## Bursary16+ Journey

**Curriculum Year 12-14** 



### Setting up your New Cycle (For current customers)

Creating a New Academic Year

Renewing student Bursary into year 13

**Updating School Bands** 

Updating your Student Homepage

**Application Form Configuration** 

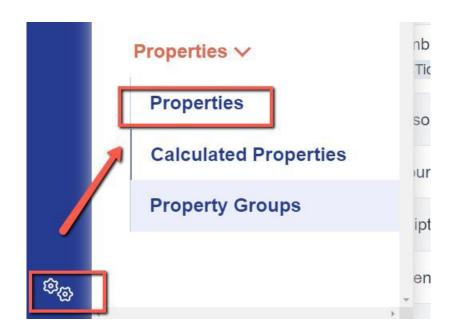
Email Templates to check/review

Linking your B16+ with your Admissions+ System

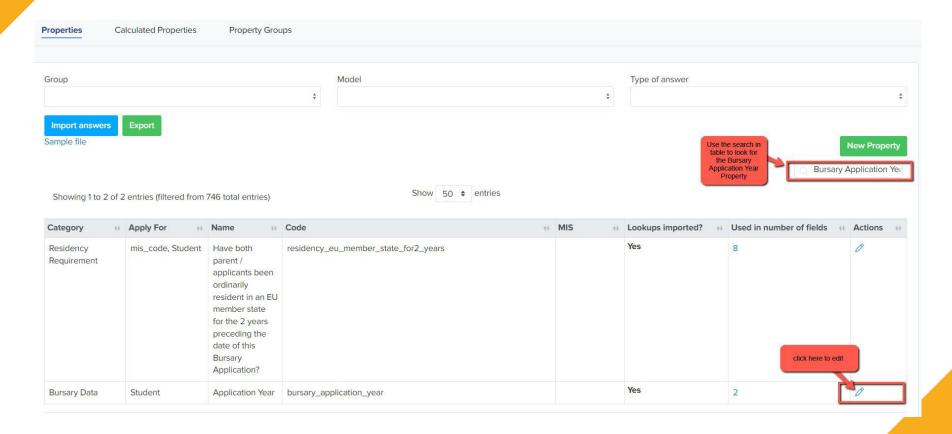
#### **Creating a New Academic Year**

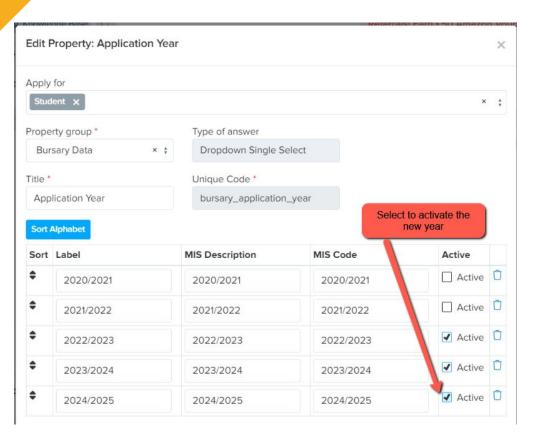
To create a new Academic Year, this needs to be added on your system's properties area first.

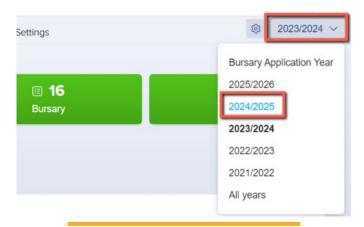
To do this, navigate to your Settings (on the lower left corner of your screen) > Properties and then Properties again.



On your properties area, look for "Bursary Application Year" and click the pencil icon to make the new academic year visible.







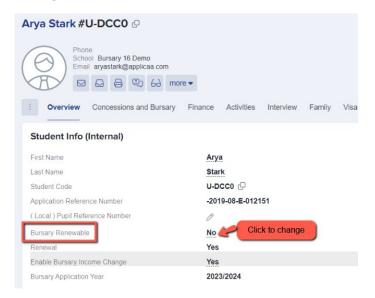
When you return to your Dashboard, your new Academic Year will be visible once at least one student has renewed their bursary or you have received new applications for the new year.

#### Renewing your existing students' bursaries

When a student has been eligible for the bursary during Year 12, as per the ESFA guidance they will need to reapply to access the funds again in Year 13. For them to do this, you must make their status 'Bursary Renewable'.

You have two options to renew the Bursary of your students. You can do this **individually via the student profile**, or **in bulk by going to the registered students table**.

To update this individually, go to the student profile and look for the **Bursary Renewal Status** option on their overview tab and change the answer to "**Yes**".

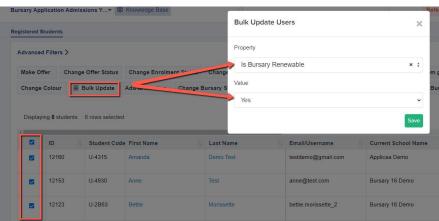




The second option is to change the students' bursary status to renewable in bulk.

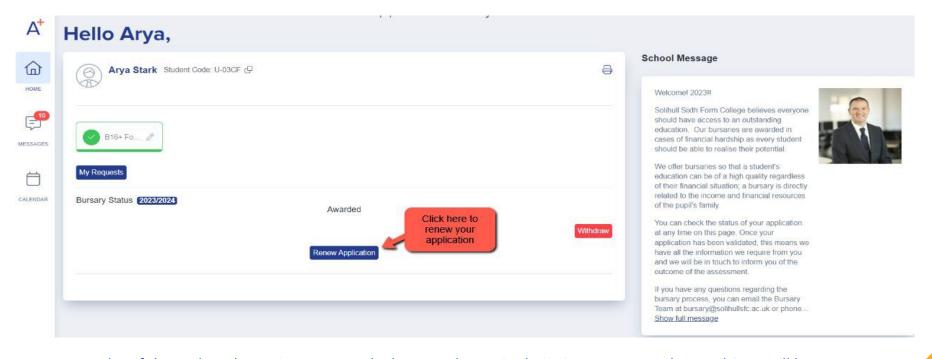
To do so, navigate to your previous year's **Awarded** tile, select your students, and then click **Bulk Update**.





A pop-up window will then display for you. Choose "Is Bursary Renewable" in the Property Field and "Yes" in the Value, then Save.

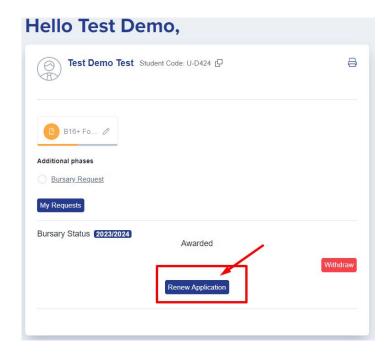
Once you've renewed the student's bursary, they should log in and a "renew application" option will appear, allowing them to fill out a new form or sign a declaration that nothing has changed, and retain all their financial information for the next form.

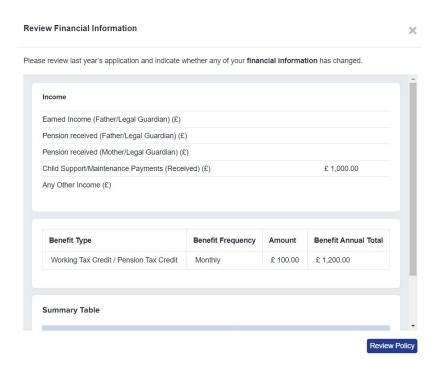


Note that if they select the option to re-apply due to a change in their circumstances, the Pupil Step will be auto-populated from last year, so that the student may ensure that all of the information is still correct. Then they must complete the remaining stages.

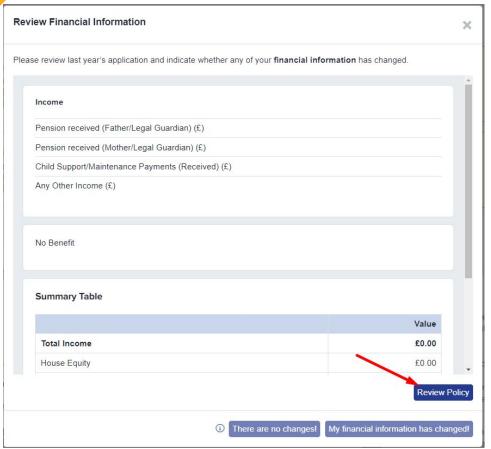
#### Renewal Feature - how it appears to the student

Once the student has logged in and clicked on the 'Renew Application' button, the students will see a pop up preview which shows them a review of their Financial Information.





They will also have to review your policy again and agree to it by clicking the 'Review Policy' button.



Review Policy	×
Please review and agree to the the bursary policy attached below	
Bursary Policy September 2021	
☐ I have read and agree to the above policy	
Bursary Guidelines and Next Steps	
☐ I have read and agree to the above policy	
	Submit

#### **Declaration of Financial Information**

Once the policies have been reviewed and agreed, the buttons below will become active for the students.



'There are no changes'

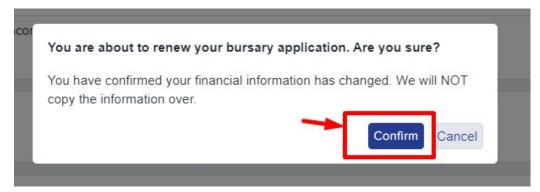
OR

'My Financial Information has changed'

If they clicked on 'There are no changes'
- it will ask them for a signature to
declare that there are no changes with
their financial information and it will be
copied over to next cycle.



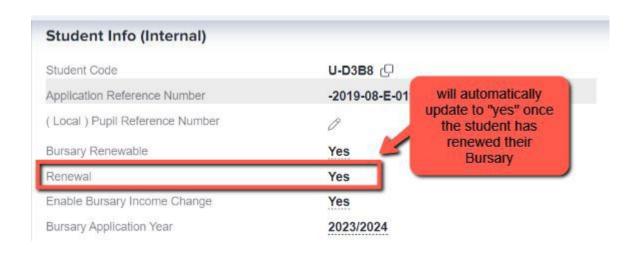
If there are changes to their information they'll select 'My Financial Information has changed' and a pop up will appear:



Once confirmed, it will show on their homepage that their current status is back to 'Not Started'.



The renewal information on the student's profile overview will also instantly update to "Yes" once the student has renewed their bursary via the student profile.

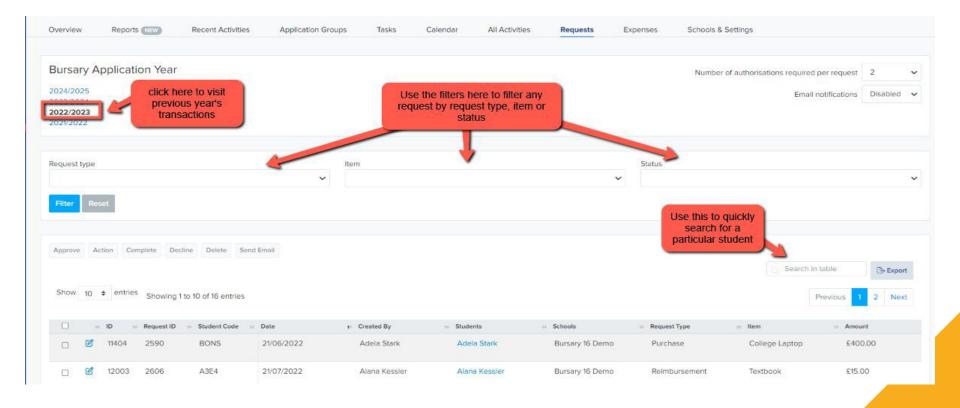


A fresh Approval Band will be calculated for the students after their Bursary has been renewed, regardless of whether they still have any bursary funds left over from previous year (funds do not carry over).

•	
Approval Band	£500.00
Funds Remaining	£500.00 (100.00%)

Additional information: Any transaction records from the previous year will also be removed on the student profile.

But you may still view these past transactions on the Bursary request area of the student by impersonating them, or by simply going to your system's request area to view your transactions from the previous academic year.



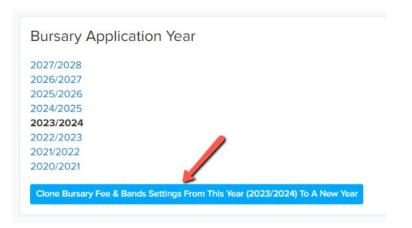
Another option is to view the student's Bursary History on the student profile. This will then allow you to access the student's prior year profile, as well as their previous year's transactions, band assignments, and household income information.



#### **Updating School Bands**

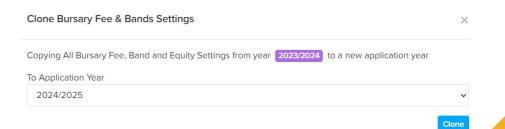
After renewing your students, you should check your bands to ensure that you have the accurate banding for this year.

To do so, go to the **Schools & Settings** tab on your Dashboard.



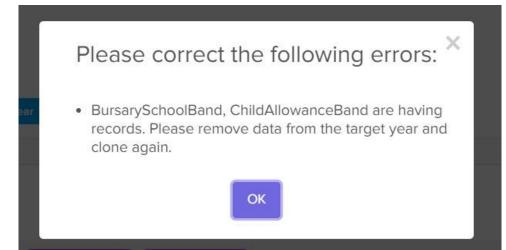


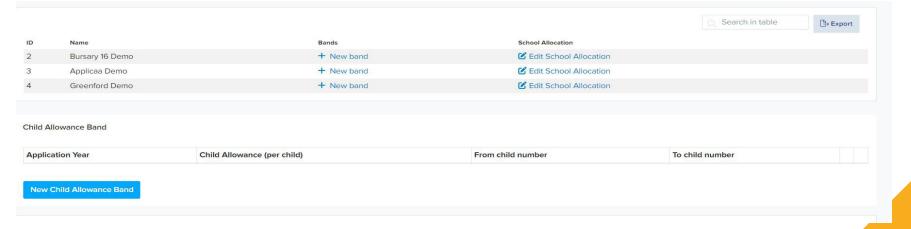
On your Bands Area, you may choose to clone last year's Bands by clicking the "Clone Bursary Fee & Band Settings from this Year to a New Year".



If you see this error notice while cloning your bands, ensure that your Band settings and Child allowance Band on the new academic year are both empty.

Here is an example of how your Band and Child Allowance should appear in the new academic year if you are wishing to clone your Bands and Child Allowance from the previous year.





#### Bursary Application Year

2027/2028

2026/2027

2025/2026

2024/2025

2023/2024

2022/2023

2021/2022

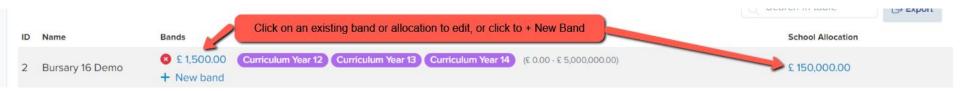
2020/2021

Click here to switch from one academic year to another

Clone Bursary Fee & Bands Settings From Th

To switch from one academic year to another, and view your banding and allocation for each year, select the year you wish to view on your **Schools & Settings** page.

Once you have successfully cloned your bands, you can also edit the bands to suit your school, and enter the total allocation you have for this academic year.



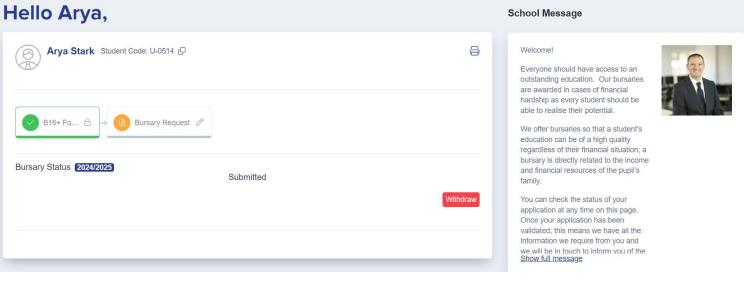
In this area you can also set or update an allowance for dependent children; if you would like the platform to reduce the 'household income' where there are a large number of children in the household, you may do so here:

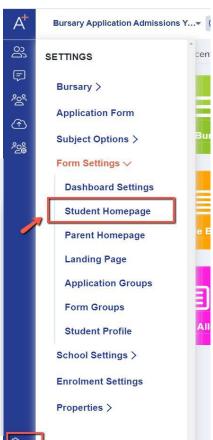
#### Child Allowance Band

Application Year	Child Allowance (per child)	From child number	To child number		
2024/2025	400.0	1	4	Edit	Destroy
2024/2025	600.0	5	10	Edit	Destroy

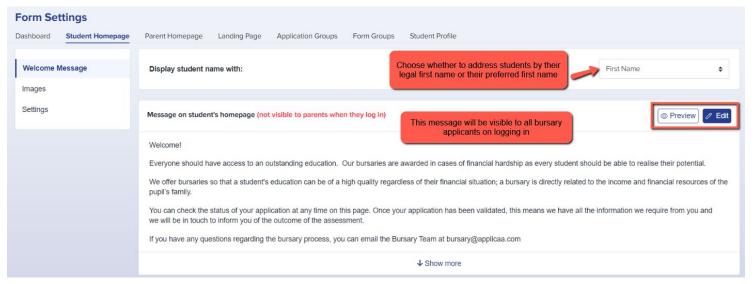
#### **Updating Student Homepage**

If you would like to make changes on your Student Homepage to update the message that you have there for this new cycle, go to Settings > Form Settings > Student Homepage.

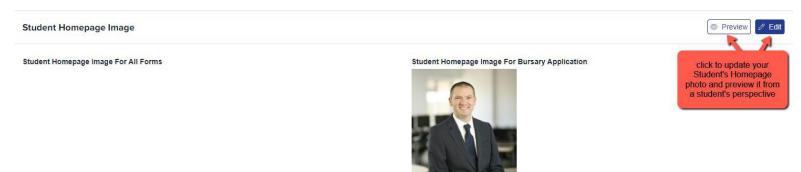




To update your message to the student, click edit and then you may preview it from a student's perspective afterwards.



You may also update your student's homepage photos by clicking edit and previewing it as a student as well.



#### **Application Form Configuration**

Your Bursary Application form from last year will be the same one that your new candidates will use this year. However, you are free to make any necessary changes to your form.

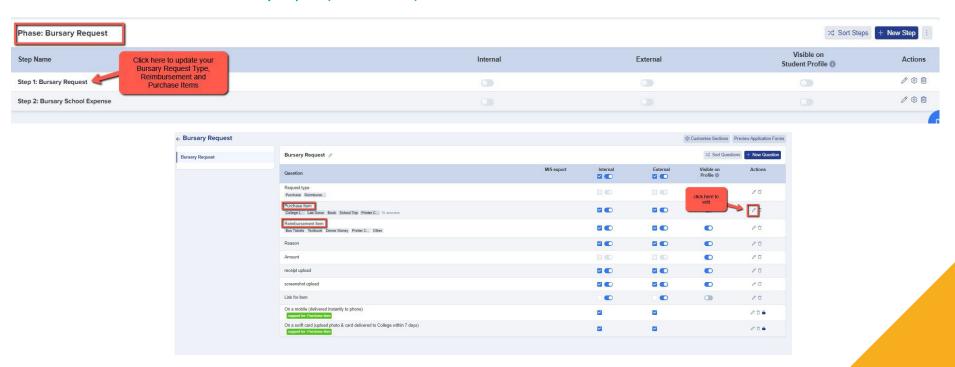
Please see on our Knowledge Base, a PDF guide on how to customise your Bursary Application form

Phase: B16+ Form		pd Sort Steps + New Step		
Step Name	Internal	External	Visible on Student Profile	Actions
Step 1: Welcome	•	•	•	19
Step 2: Agreement	•			00
Step 3: Pupil	•			00
Step 4: Household Information	•			0 8
Step 5: Income	•			0 8
Step 6: Outgoing				00
Step 7: Other Assets				00
Step 8: Dependent Children	•			0 8
Step 9: Continuation				00
Step 10: Documents			<b>3</b>	0 0
Step 11: Bursary Summary				00

You may also wish to review the type of requests that the student can make.

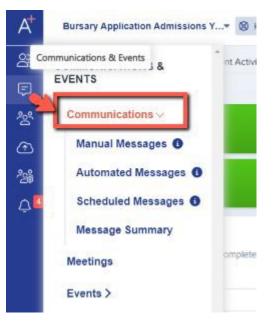
Navigate to Settings > Application Form and scroll down to Bursary Request to update your school's Bursary Request type, Reimbursement Items or Purchase Items

How to submit a Bursary Request (Staff guide only)
How to update the Bursary Request form
How to submit a Bursary Request (Student Guide)



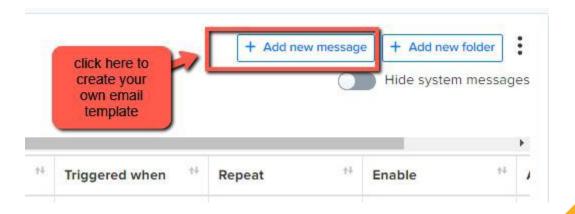
#### **Email Templates**

In your Communications & Events tab you will see sections for Manual Messages, Automated Messages and Scheduled Messages.

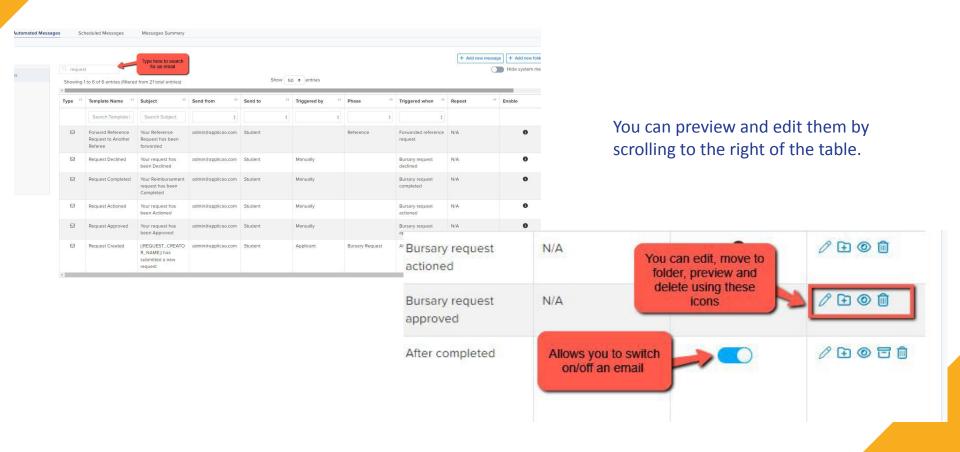


The platform has several email templates already available for you to use. We would recommend having a look through these templates, seeing which ones you would like to make any changes to, to reflect the messages you would like to use at your school for this year.

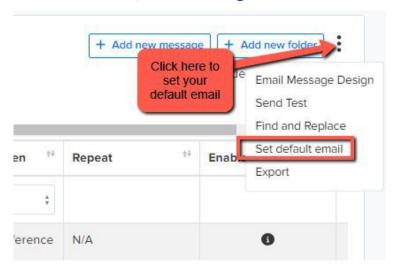
You may create your own manual templates that you may use later in the cycle here:



There are also several automated emails you will need to check. We recommend going over these templates and determining which ones you want to turn on/off or alter.



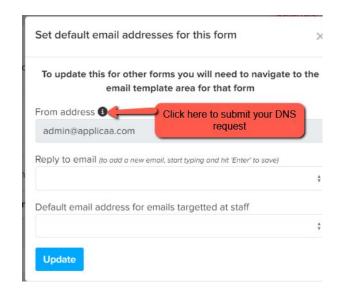
Before you send any emails via your platform, it is important to set your default emails; this will determine which email address your emails will be sent from (visible to students) and also which email address replies will go back to. You can set these by going to one of your email areas, clicking the kebab menu in the top right corner, and choosing 'Set Default Email'.



Please access our <u>Knowledge Base</u> for an overview of the communication area, and of course contact us on us on **020 8762 0882** for further questions.

Read more about DNS here.

If you are seeing "admin@applicaa.com" in the From address, this means you have not requested a DNS update. You can request this by clicking this icon and adding the details for your IT Manager - it will then mean you can send emails from your own school domain once this has been activated!



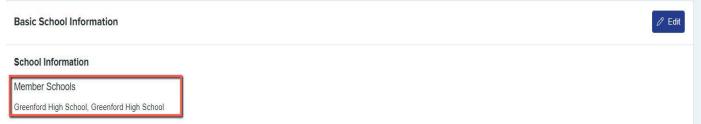
#### **Linking your Bursary Platform with your A+ System**



We can easily link your bursary platform to your A+ platform so your enrolled students in A+ can log into your B16+ system using the same credentials and begin an application for the bursary fund. Their basic details will pull across to B16+.

To check that the two platforms are already connected to one another, please log in to your Bursary Platform and navigate to **Settings > General Settings.** 

If no member school is listed, but you would like your A+ and B16+ systems to be connected please call our Support Team on **0208 762 0882**.

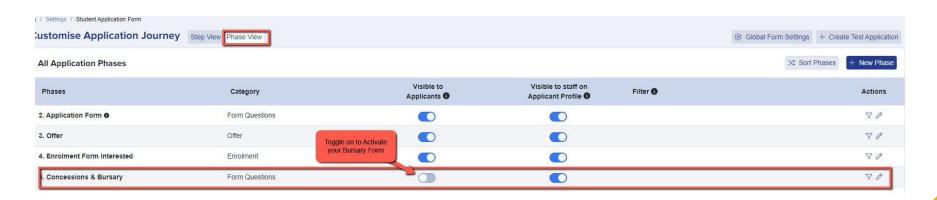


Another way of checking whether the two platforms are already linked to one another is by checking if a new Bursary Phase is visible on your A+ platform.

To verify this, log in to your A+ Platform and navigate to **Settings > Application Form > Phase View.** 

**Concessions & Bursary** should be visible to you, which you may activate so that students registered/enrolled in your A+ platform can access your Bursary while logged in on the same platform.

You may also provide them with the Bursary link (which is the same link you are using to login as a staff member), and they should be able to log in using the same credentials they used in A+.



# Do you have any questions?