

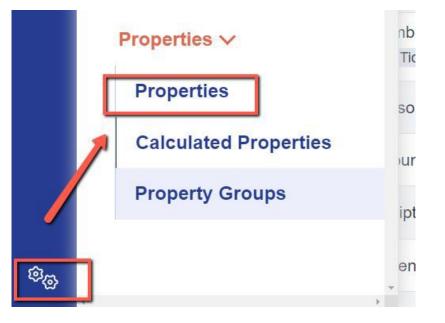
Preparing for your New Cycle (For current customers)

- Adding 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

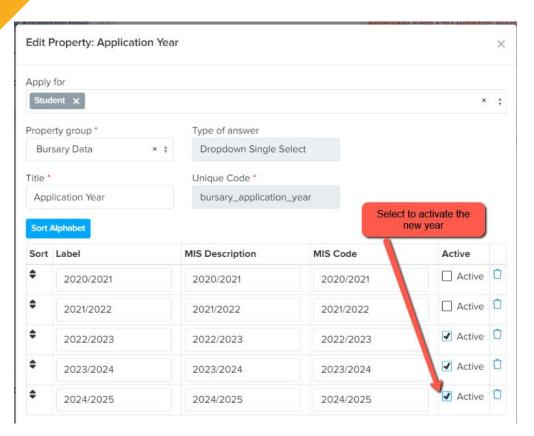
To create a new Academic Year, this needs to be added on your system's properties area first.

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.

Properties	Calculated Properties	Property Grou	ps				
Group			Model		Type of answer		
			\$		\$		ŧ
	2 of 2 entries (filtered from		Show 50		ta Ap	Property	New Property
Category	14 Apply For 14	Name 🙌	Code	†∔ MIS		Used in number of fields	Actions ++
Residency Requirement	mis_code, Student	Have both parent / applicants been ordinarily resident in an EU member state for the 2 years preceding the date of this Bursary Application?	residency_eu_member_state_for2_years		Yes	8 click here to ed	t
Bursary Data	Student	Application Year	bursary_application_year		Yes	2	0





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.

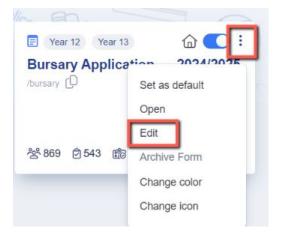
Editing the form name to reflect the new cycle

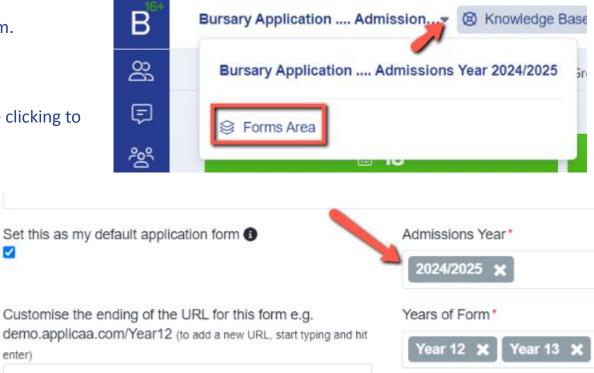
To update the academic year of your bursary form (which will be reflected in the name seen by applicants), navigate to the forms area of your system:

Click the kebab menu to edit the form.

Remove the old academic year.

Select the new academic year before clicking to save.





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enter)

Renewing your existing students' bursaries

When a student has been eligible for the bursary during Year 12, as per the DFE 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**".

Arya Stark #U-DCC0 🖓	
Phone School Bursary 16 Demo Email aryastark@applicaa.com	•
Concessions and Bursary	Finance Activities Interview Family Visa
Student Info (Internal)	
First Name	Агуа
Last Name	Stark
Student Code	U-DCC0 @
Application Reference Number	-2019-08-E-012151
(Local) Pupil Reference Number	0
Bursary Renewable	No Click to change
Renewal	Yes
Enable Bursary Income Change	Yes
Bursary Application Year	2023/2024

Update Is Bursary Renewable		×
Yes	×	4
Cancel	> Sav	/e

Important - please note:

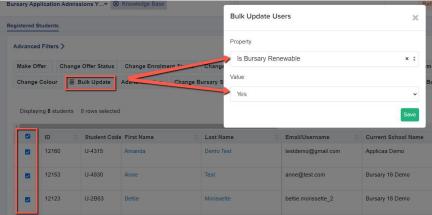
Renewing a student's bursary ends their current bursary cycle - they will be unable to submit any requests for the current year

Only renew your students once you have finished with their bursaries for the current year

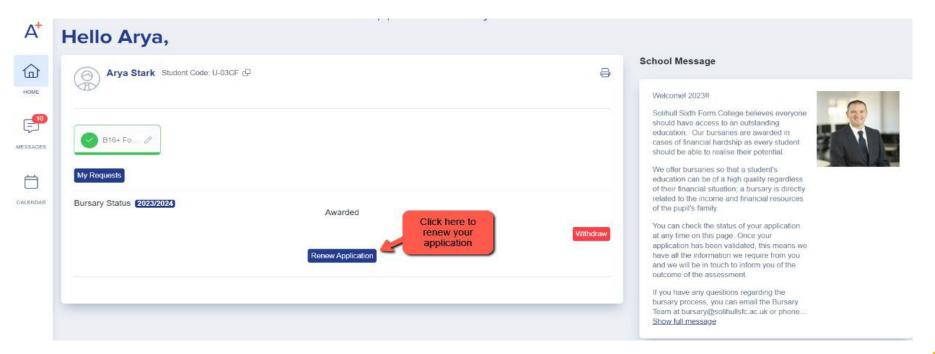
The second option is to change the students' bursary status to renewable in bulk.

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.

Hello Test Demo,	
Test Demo Test Student Code: U-D424	8
B16+ Fo Ø	
Bursary Status 2023/2024 Awarded	Withdraw

Income						
Earned Income (Father/Legal Guardian) (£)						
Pension received (Father/Legal Guardian) (\pounds)						
Pension received (Mother/Legal Guardian) (£)						
Child Support/Maintenance Payments (Received) (£) £ 1,000.00						
Any Other Income (£)						
Benefit Type	Benefit Frequency	Amount	Benefit Annual Total			
		£ 100.00	£ 1,200.00			

Review Policy

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

Review Financial Information	
Please review last year's application and indicate whether any of your financial information has changed.	
Income	Review Policy
Pension received (Father/Legal Guardian) (£)	
Pension received (Mother/Legal Guardian) (£)	Please review and agree to the the bursary policy attached below
Child Support/Maintenance Payments (Received) (£)	Bursary Policy September 2021
Any Other Income (£)	☐ I have read and agree to the above policy
	Bursary Guidelines and Next Steps
No Benefit	☐ I have read and agree to the above policy
Summary Table	Submit
Value	
Total Income £0.00	
House Equity £0.00	
Review Policy	
① There are no changes! My financial information has changed!	

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.

Add Signature
Please sign as confirmation that none of your financial information has changed.
Draw Type Upload
ت ت 🕲 🕒
By signing this area with an electronic signature, I agree that the signature will be as valid as handwritten signatures to the extent allowed by local law.
Cancel Accept & Sign

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

You are about to renew your bursary application. Are you sure?

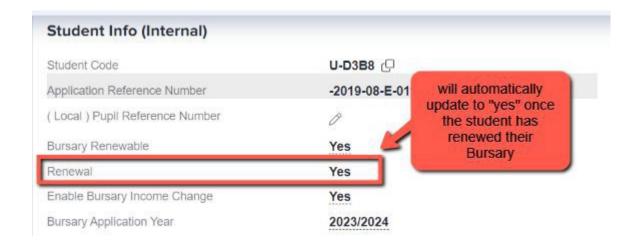
You have confirmed your financial information has changed. We will NOT copy the information over.



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

Withdraw

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.



Bursary History

Name	Bursary Year	
Bettie Morissette active	2023/2024	
Bettie Morissette this application	2023/2024	
Bettie Demo Morissette Click on this hyperlink to view the student's previous year profile	2021/2022	

Updating School Bands

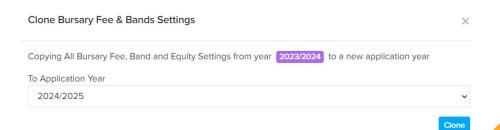
After renewing your students, you should check your bands to ensure that you have the accurate banding for this year.

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

Bursary Applicatio	on Year
2027/2028	
2026/2027	
2025/2026	
2024/2025	
2023/2024	
2022/2023	
2021/2022	
2020/2021	
Clone Bursary Fee & Bands S	Settings From This Year (2023/2024) To A New Year



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.

Please correct the following errors: $^{ imes}$

 BursarySchoolBand, ChildAllowanceBand are having records. Please remove data from the target year and clone again.



					Q Search in table	Export
ID	Name		Bands	School Allocation		
2	Bursary 16 Demo		+ New band	C Edit School Allocation		
3	Applicaa Demo		+ New band	C Edit School Allocation		
4	Greenford Demo		+ New band	C Edit School Allocation		
Applicatio	on Year	Child Allowance (per child)		From child number	To child number	
New Chi	ild Allowance Band					

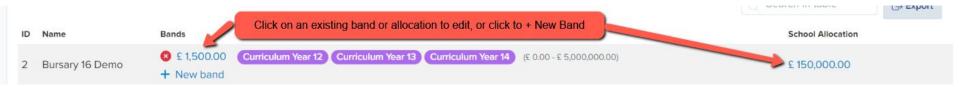


Clone Bursary Fee & Bands Settings From Th

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

Bursary Application Admissions Y

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SETTINGS

Bursary >

Application Form

Subject Options >

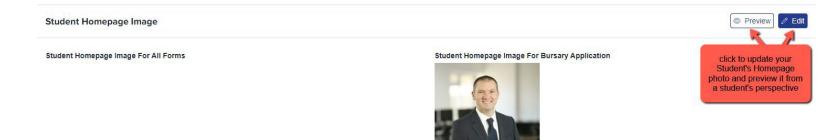
If you would like to make changes on your Student Homepage to update the message that you have there for this new cycle, go to Settings > Form Settings > Student Homepage.

Form Settings V Hello Arya, School Message **Dashboard Settings** Student Homepage Arya Stark Student Code: U-0514 🖓 0 Welcome! Everyone should have access to an **Parent Homepage** outstanding education. Our bursaries are awarded in cases of financial Landing Page hardship as every student should be able to realise their potential. **Application Groups** B16+ Fo... 合 Bursary Request 0 We offer bursaries so that a student's education can be of a high quality Form Groups regardless of their financial situation; a bursary is directly related to the income Bursary Status 2024/2025 Student Profile and financial resources of the pupil's Submitted family. School Settings > Withdraw You can check the status of your application at any time on this page. **Enrolment Settings** Once your application has been validated, this means we have all the information we require from you and Properties > we will be in touch to inform you of the Show full message

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

Form Settings	
Dashboard Student Homepage	Parent Homepage Landing Page Application Groups Form Groups Student Profile
Welcome Message	Display student name with: Choose whether to address students by their legal first name or their preferred first name
Settings	Message on student's homepage (not visible to parents when they log in) This message will be visible to all bursary This message will be visible to all bursary
	Welcome!
	Everyone should have access to an outstanding education. Our bursaries are awarded in cases of financial hardship as every student should be able to realise their potential.
	We offer bursaries so that a student's education can be of a high quality regardless of their financial situation; a bursary is directly related to the income and financial resources of the pupil's family.
	You can check the status of your application at any time on this page. Once your application has been validated, this means we have all the information we require from you and we will be in touch to inform you of the outcome of the assessment.
	If you have any questions regarding the bursary process, you can email the Bursary Team at bursary@applicaa.com
	↓ Show more

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			>⊄ Sort Steps	+ New Step
Step Name	Internal	External	Visible on Student Profile 🚳	Actions
Step 1: Welcome				08
Step 2: Agreement				0 18
Step 3: Pupil				00
Step 4: Household Information				10
Step 5: Income				00
Step 6: Outgoing				10
Step 7: Other Assets				10
Step 8: Dependent Children				10
Step 9: Continuation				00
Step 10: Documents				10
Step 11: Bursary Summary				08

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)

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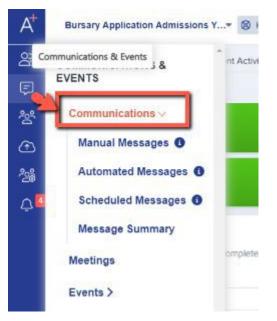
se: Bursary Request			≍; Sort Steps	+ New Step
Name Click here to update your Bursary Request Type,	Internal	External	Visible on Student Profile 🚯	Actions
1: Bursary Request Control Reimbursement and Purchase Items				1 🕸 🗎
2: Bursary School Expense				1 1 1

ursary Request					Customise Sections	Preview Application Form
rsary Request	Bursary Request 🥖	⊃⊄ Sort Questio	+ New Question			
	Question	MIS export	Internal	External	Visible on Profile ()	Actions
	Request type Purchase Reimburse				click here to	00
	Purchase Item College L. Lab Goum Book School Trip Printer C 15 answers				edit	> 🗗
	Reimbursement item Bus Tickets Textbook Dinner Money Printer C Other					00
	Reason					00
	Amount					00
	receipt upload					00
	screenshot upload					00
	Link for item					00
	On a mobile (delivered instantity to phone) support for Parchase item					006
	On a swift card (upload photo & card delivered to College within 7 days) support for: Purchase item					00



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.

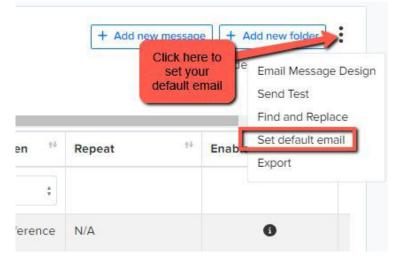
You may create your own manual templates that you may use later in the cycle here:



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.

Type	Template Name	Subject **	Send from **	Send to	14 Triggered by	Phase	Triggered when	Repeat	Enable	
	Search Template I	Search Subject			•	•	:			You can provide and adit them by
	Forward Reference Request to Another Referee	Your Reference Request has been forwarded	admin@applicaa.com	Student		Reference	Forwarded reference request	N/A	0	You can preview and edit them by scrolling to the right of the table.
	Request Declined	Your request has been Declined	admin@applicaa.com	Student	Manually		Bursary request declined	N/A	0	scrolling to the right of the table.
	Request Completed	Your Reimbursement request has been Completed	admin@applicaa.com	Student	Manually		Bursary request completed	N/A	0	
	Request Actioned	Your request has been Actioned	admin@applicaa.com	Student	Manually		Bursary request actioned	N/A	0	
	Request Approved	Your request has been Approved	admin@applicaa.com	Student	Manually		Bursary request	N/A	0	
4	Request Created	((REQUEST_CREATO R_NAME)) has submitted a new request	admin@applicaa.com	Student	Applicant	Bursary Request	* Bursary actione	y request ed		N/A You can edit, move to folder, preview and
							Bursary approv	/ request ed		N/A delete using these icons
							After co	ompleted		Allows you to switch

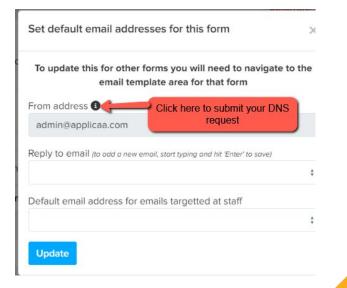
Before you send any emails via your platform, it is important to set your default emails; this will determine which email address your emails will be sent from (visible to students) and also which email address replies will go back to. You can set these by going to one of your email areas, clicking the 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.**

Basic School Information

🖉 Edit

School Information

Member Schools Greenford High School, Greenford High School

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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+.

/ Settings / Student Application Form						
ustomise Application Journey	Step View Phase View					Global Form Settings + Create Test Application
All Application Phases						→ Sort Phases + New Phase
Phases	Category		Visible to Applicants	Visible to staff on Applicant Profile	Filter	Actions
2. Application Form 0	Form Questions					$\nabla \partial$
3. Offer	Offer	Toggle on to Activate				$\nabla \mathscr{P}$
4. Enrolment Form Interested	Enrolment	your Bursary Form				$\nabla \mathcal{P}$
5. Concessions & Bursary	Form Questions					∇P

Do you have any questions?