



Features:

- ◆ Institutionally defined Fund types
- ◆ Institutionally defined reason codes
- ◆ Easy to use enquiry screen
- ◆ A Detailed Report can be produced
- ◆ Can be integrated to Agresso QL Financials cashbook and sales ledger to complete the full cycle.

The financial aid module caters for any type of funds the student may receive, for example hardship, bursary etc. The ability for the institution to define the fund types means the system is flexible to suit any institutions needs.

All details relating to when the student applied, why they have applied and the outcome can be recorded within the details section of the module. Within the workbench there is the ability to link to Agresso QL finance to record and make the payment against the students account.

A detailed report can be produced detailing all the students along with the type of fund, how much they have applied for along with the reason and outcome.

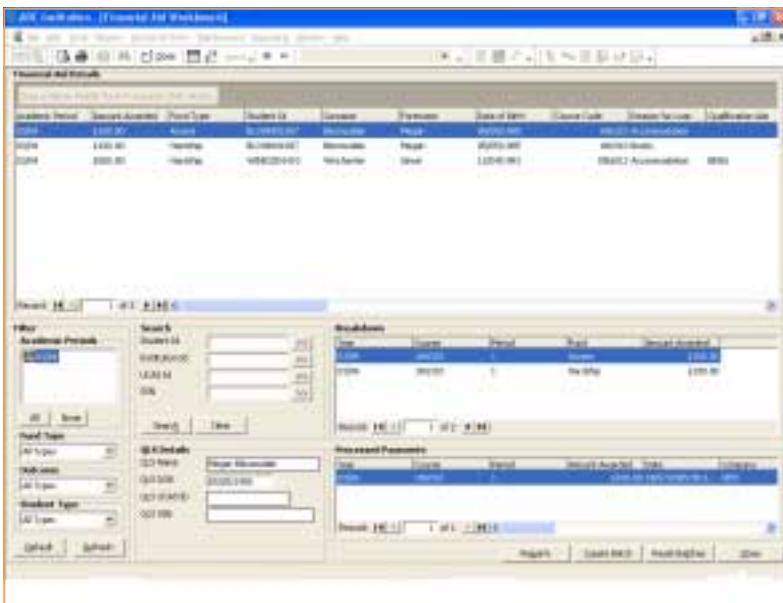
Defining Fund Types

Different institutions may have different funds they want to issue to students. The ability to set up institutionally defined fund types means that all funds can be catered for. Against each fund the annual values for each fund can be assigned and each time a fund is awarded the value will reduce.

Academic Period	Allocated	Remaining
04/05	£10,000.00	£10,000.00

Financial Aid Details

The financial aid details tab enables you to enter details of the funds students have applied for. Details of whether the fund has been applied for, accepted or declined can be recorded along with an institutionally defined reason code. Students can apply for multiple funds with all details recorded along with the ability to enter notes.



Financial Aid Workbench

The Financial aid workbench provides a useful enquiry tool enabling the user to view all funds which have been applied for by the students. Filter criteria help to analysis the data by academic year, fund type, outcome and student date.

Agresso QL Financials Integration

When used in conjunction with Agresso QL financials cash book transactions can be created and recorded against the sales ledger account. Different cash book journals can be used to help analyse the fund information in both the cash book and the general ledger.



Reporting

The learner support fund is one of the standard outputs for the financial aid module. In addition a fund monitoring report can be produced in and exported to a spreadsheet.

Learner Support Fund - 2002-03 Academic Year Financial Monitoring Data

Please do not alter this form in any way. Complete yellow boxes only.

Provider name: _____

Address: _____

Contact name: _____ To: No. _____ e-mail: _____

Please enter the fund name, amount or hard copy to your local LSC office by 31st August 2005 - attention of: _____

Email: _____ To: _____ Fax: _____

LSC name: _____ LSC Code: _____

FUNDS PROVIDED (as detailed on LEP Schedule)

2002-03 Hardship Funds

Hardship Funds		
Successful		
Unsuccessful		
Total Allocation		

2002-03 Access Funds

Access Funds		
Successful		
Unsuccessful		
Total Allocation		

2002-03 Fee Remission Funds

Fee Remission Funds		
Successful		
Unsuccessful		
Total Allocation		

2002-03 Other Funds

Books and equipment (to complete course)		
Transport and other private school accommodation and meals		
Additional course costs (eg. trip)		
Other (to be specified in comments)		

	A	B	C	D	E	F	G
1	Financial Aid.csv						
2	2002 - 03 Access and Hardship Monitoring Return						
3	All Aid Types 2002 - 03 interim return 31 October 2003						
4							
5	Hardship		Number of first-year students awarded at this institution by 31 October 2003	Funds required to make payments to first-year students in 2002 - 03 (£)	Number of second-year students awarded at this institution by 31 October 2003	Funds required to make payments to second-year students in 2002 - 03 (£)	
6		Successful	2	440.00	1	500.00	
7		Unsuccessful	0	0.00	0	0.00	
8		Total	2	440.00	1	500.00	
9							
10							
11	Access		Number of first-year students awarded at this institution by 31 October 2003	Funds required to make payments to first-year students in 2002 - 03 (£)	Number of second-year students awarded at this institution by 31 October 2003	Funds required to make payments to second-year students in 2002 - 03 (£)	
12		Successful	2	1,560.00	1	400.00	
13		Unsuccessful	0	0.00	0	0.00	
14		Total	2	1,560.00	1	400.00	
15							
16							
17	Bursary		Number of first-year students awarded at this institution by 31 October 2003	Funds required to make payments to first-year students in 2002 - 03 (£)	Number of second-year students awarded at this institution by 31 October 2003	Funds required to make payments to second-year students in 2002 - 03 (£)	
18		Successful	2	1,200.00	1	300.00	
19		Unsuccessful	0	0.00	0	0.00	
20		Total	2	1,200.00	1	300.00	
21							
22							
23	Fee Remission		Number of first-year students awarded at this institution by 31 October 2003	Funds required to make payments to first-year students in 2002 - 03 (£)	Number of second-year students awarded at this institution by 31 October 2003	Funds required to make payments to second-year students in 2002 - 03 (£)	
24		Successful	2	2,000.00	1	700.00	
25		Unsuccessful	0	0.00	0	0.00	
26		Total	2	2,000.00	1	700.00	
27							
28							
29	This sheet lists all fund applications for a given academic year.						
30	First year students with an outcome date <= 31 October 2003 are included						
31	Second year students with an outcome date <= 31 October 2003 are included						
32							

