



Education
Funding
Agency

16 to 19 Bursary Fund: management information return

**A guide to completing the 2013 to 2014
end of academic year data return**

September 2014

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Introduction

1. This guide provides information for institutions to support the completion and return of the 2013 to 2014 end of year Management Information (MI) return for the 16 to 19 Bursary Fund.
2. The MI return will open on 1 October 2014; and institutions are asked to complete their return by 31 October 2014.
3. The MI return is for institutions to inform the Education Funding Agency (EFA) about the numbers of students in the defined vulnerable groups supported by the full £1,200 bursaries (or part of it); the amount of vulnerable student bursary funding paid to students in the defined vulnerable groups; the number of students supported by discretionary bursaries and the number of discretionary bursary awards made. This information is for the whole of the 2013 to 2014 academic year.

Who should complete the MI return

4. Institutions that received 16 to 19 bursary funding direct from the EFA; and institutions that are maintained by a local authority (LA) and received EFA funding (including, but not exclusively, 16 to 19 bursary funding) via the LA - i.e. school sixth forms - should complete and submit their own MI return.
5. Local authorities should complete a separate MI return on behalf of each institution whose 16 to 19 Bursary Fund is paid via the local authority - but was not in receipt of other EFA funding during 2013 to 2014; i.e. institutions that featured on an LA's Annex C in 2013 to 2014 (of which there were only twenty four (24) in total).
6. Local authorities that received 16 to 19 bursary funding for their own education provision should submit a separate MI return.
7. In the 2013 to 2014 academic year, a significant number of institutions that may have appeared on their LA's Annex C in previous years were in receipt of EFA funding through the High Needs Students (HNS) funding process. Reflecting this change, these institutions should complete their own MI return for the 2013 to 2014 academic year.

Accessing the MI return

8. The 2013 to 2014 academic year MI return can be accessed through two (2) routes. Firstly, it can be accessed via the EFA Information Exchange; a Secure Access web-enabled facility. The Information Exchange is a facility through which information can be shared between the EFA and the institutions we fund. [Initial access](#) to the EFA Information Exchange is available now for all EFA funded institutions; each of which has a designated 'super user'. Each super user has the facility to grant access to the Information Exchange to their colleagues. That process will include the creation of a password – which will be needed to access Information Exchange.
9. The Information Exchange will become one of the primary conduits for sharing information, so it may be beneficial to use it to make this MI return; and so familiarise yourself with its functionality. [Further information](#) – including how to request support to use the Information Exchange is available on the gov.uk website.
10. Once in the Information Exchange, you should click on 'Forms' and select: <http://www.education.gov.uk/16-to-19-bursary-fund-management-information-return>. It is also possible to access the form directly at: <http://www.education.gov.uk/16-to-19-bursary-fund-management-information-return>
11. The 16 to 19 Bursary Fund MI form itself has a registration stage. Registration is accomplished by clicking on the "Sign-up now" option; entering your e-mail address; and creating a password. These details can then be used to "Login".
12. This stage of registration is optional; though only by registering here will you be able to start the form; save it, and come back to it later - at the point at which you saved it. Please be aware that this registration process is solely to give you this facility. The only reason we may use this registration information would be to clarify details of the MI return. Your registration details will not be used for any other purpose.
13. Please note that a part-completed form is linked to an individual's account; so can only be re-accessed at a later stage using that individual's log in details.
14. If you choose not to register, and subsequently exit the form prior to it being submitted, you will need to start the form again when you come back to it later.
15. Your registration details will also be pulled through automatically to the final 'Declaration' stage of the form. Anyone who doesn't register will be required to manually input their details at the Declaration stage instead.

Introducing the return

16. The following paragraphs provide information on a number of the fields within the form. They should be read in conjunction with the form and any error messages generated when completing the form to ensure appropriate data is entered at each field.

Institution Details

17. Institutions must enter their Unique Provider Identification Number (UPIN); a six digit reference number commonly used by the EFA (and SFA) in correspondence with you. Institutions that were a 2013 to 2014 Annex C institution do not have a UPIN. MI Returns being made by, or on behalf, of these Annex C institutions should instead use the appropriate Unique Reference Number (URN); a six digit reference number as recorded on Edubase.

You should enter your UPIN (or URN for Annex C institutions only) as it stood at 30th September 2014. If you do not know your UPIN (or URN for Annex C institutions only), we have uploaded a full list for reference at:

<https://www.gov.uk/government/publications/16-to-19-bursary-fund-mi-return-for-2013-to-2014>

18. Entry of a correct UPIN or URN (for Annex C institutions only) will lead to the auto-population of "Institution Name", "Institution Type" and the "Local Authority" in which you are based. For institutions that deliver provision from multiple sites or locations, "based" is determined by the main correspondence address as used by the EFA or SFA.

19. The "Institution Name" that appears should be recognisable to you; although it may not be letter perfect. If the details that have auto-populated clearly do not belong to your institution, please contact the EFA for clarification at:

1619bursaryfund.EFA@education.gsi.gov.uk . Please do not contact us to report what may normally be considered to be 'minor' discrepancies.

20. Once this step has been completed, you may start to input your data for vulnerable student bursaries and discretionary bursaries.

The MI Return

Overview

21. Each section must be completed in full and an entry must be made at each answer field you are presented with. This means that all the fields you are presented with are mandatory. Zero (0) is an acceptable response to some questions; but mandatory fields cannot be left blank.
22. The form features introductory notes as a lead-in to some questions. Please read this information prior to entering your answer/s. It has been included to guide you away from common mistakes that have been made in MI returns in previous years.
23. The form includes some validation. This means that any entries which do not meet the defined parameters of a field will generate an error message. The message will explain the error/s and an alternative entry must be made in order to clear the error/s and progress to the next screen.
24. The form cannot be submitted until a valid entry has been made in all mandatory fields.

Vulnerable Student Bursaries

25. This section asks if you awarded any vulnerable student bursaries (Yes or No).
26. If you indicate 'No' you will be routed through to the discretionary bursary section of the form.
27. If you indicate 'Yes', you will be asked to quantify the number of vulnerable students who received support; and then quantify how much vulnerable student bursary funding was paid to those students.
28. We are asking only one (1) question to capture the total number of students who received vulnerable student bursary support; and one (1) question to capture the total amount of vulnerable student bursaries paid to students. This is different from previous years – when we have asked for some separate “full £1,200” and “pro rata” information.

When recording the amount of vulnerable student bursary funding paid to students, please do not report any element of discretionary bursary expenditure (i.e. any additional funds paid to vulnerable students from an institution's discretionary bursary allocation).

Discretionary Bursaries

29. This section asks if you awarded any discretionary bursaries (Yes or No).

30. If you indicate 'No' you will be asked to explain why not from a list of possible reasons. 'Other' is an option in the list and, if selected, you will be invited to expand on the reason/s for the non-award of discretionary bursaries in more detail (up to two hundred (200) characters) in a free text box. You will then be routed through to the Declaration stage of the form.

31. If you indicate 'Yes', you will be asked to quantify the number of students awarded a discretionary bursary; and how many awards were made to students in each of the defined categories of discretionary bursary spend: "Transport", "Books or Equipment", "Meals" or "Anything Other".

32. The form will automatically calculate the total number of awards based on the numbers you enter in each of the four (4) award categories referred to above. When applicable, please enter a zero (0) rather than leave a category blank.

33. If you indicate that you made at least one (1) bursary award in the "Anything Other" category, you will be invited to expand on the reason/s for this type of award/s in more detail (up to two hundred (200) characters) in a free text box.

The total number of discretionary bursaries awarded may be equal to or greater than the number of students who received an award – but cannot be less.

This is because you may count a student more than once – but only when reporting on "awards".

For example, if you had one (1) student who made two (2) successful applications for a discretionary bursary over the course of the academic year, you should record two (2) awards in the appropriate award category (or categories) **if each award was made for a single reason (e.g. support for "Transport")**

If one (1) student was given one (1) award and that award was made for more than one (1) reason (e.g. support for "Transport" and "Meals"), you should record two (2) reasons for the award; against both "Transport" and "Meals".

Please do not count each payment instance as an award.

Declaration / Submitting the MI return

34. When the form has been fully completed, you should read the declaration at the end of the form; confirm your acceptance; and then click on the 'Submit' button. By submitting a return, you are confirming that all the information is correct; to your knowledge.

35. You will be sent an electronic version of your submitted return by e-mail. It is recommended that you electronically save, or print and file this information; as it may be used as part of a future EFA audit of your institution.

36. Please note that you will not be able to amend any information once you have submitted your return – though you will be able to view the information that has been submitted.

37. If, after the form has been submitted, you believe that an error has been made in the return; you will need to submit a new return. Where any institution has submitted more than one return, we will take the latest (most recent) return to be correct.

Sources of further information and advice

Documents, including scheme guidance and Q&A, to support the administration of the 16 to 19 Bursary Fund and provide detailed information about the policy in the 2013 to 2014 academic year are available on the gov.uk website at: [16 to 19 Bursary Fund guidance](#)

For any queries about the data return, e-mail:

1619bursaryfund.efa@education.gsi.gov.uk



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