Bursary+ User Training Guide

Contents

1. How parents apply (new bursary applications)

For Schools that are <u>only using Bursary+</u> (not using Admissions+ to manage school admissions)

1. You will need to decide how you want you parents to get the website link for your school's bursary system.

The school admissions team should have a list of applicants for the school that are interested in applying for a bursary.

You can either have them share the bursary link directly with them or have them share a list of contacts with you so you can

get in touch and send a welcome email.

Here is a sample email you could use to send the link to the parents.

The parts in red would need to be filled in with the correct information for your school and bursary system.

Sample message for providing parents with a link for the bursary system

Dear ***parents salutation***

Thank you for your interest in applying for a bursary at ***your school's name***

The next step in completing your application is to create a parent account on our online Bursary Application System.   Please click the link below to register.

School's Bursary System URL e.g. https://bursarydemo.applicaa.com/

Should you have any questions or difficulty please email ***Bursar's Email Address***

Kind regards,
School Bursar
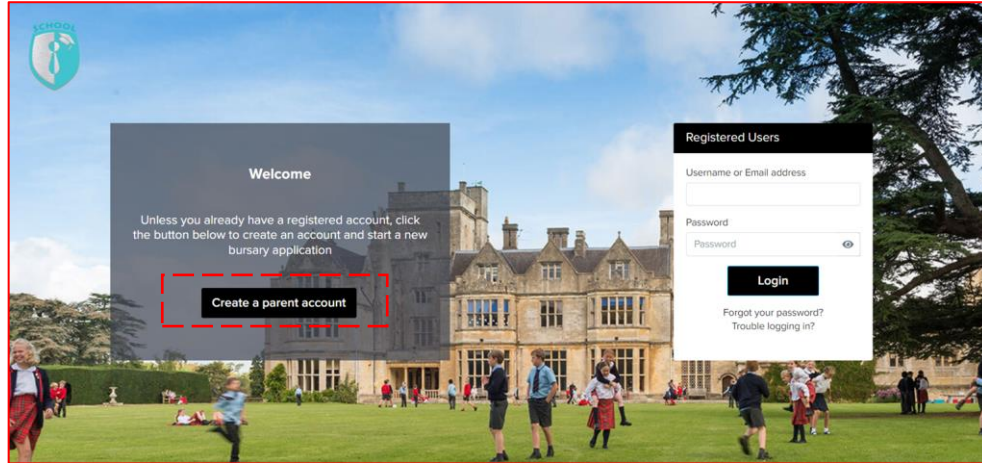***Bursar's Email Address***
Bursar's Contact Number

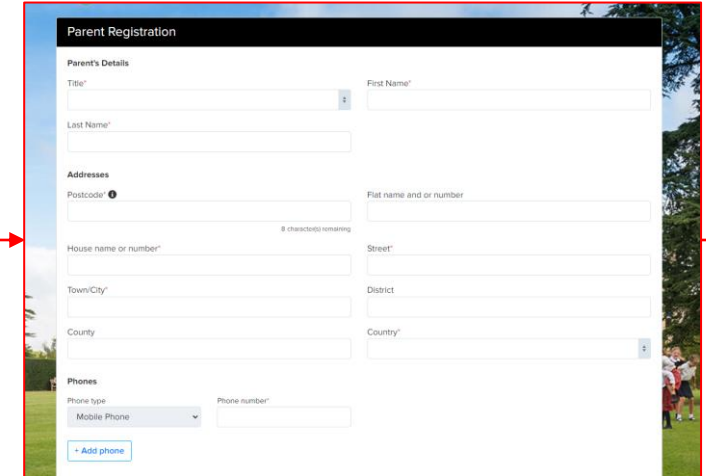# 1. How parents apply (new bursary applications)

Schools that are <u>only using Bursary+</u> (not using Admissions+ to manage school admissions)

The Image below show parent registration process once they have received the website link.
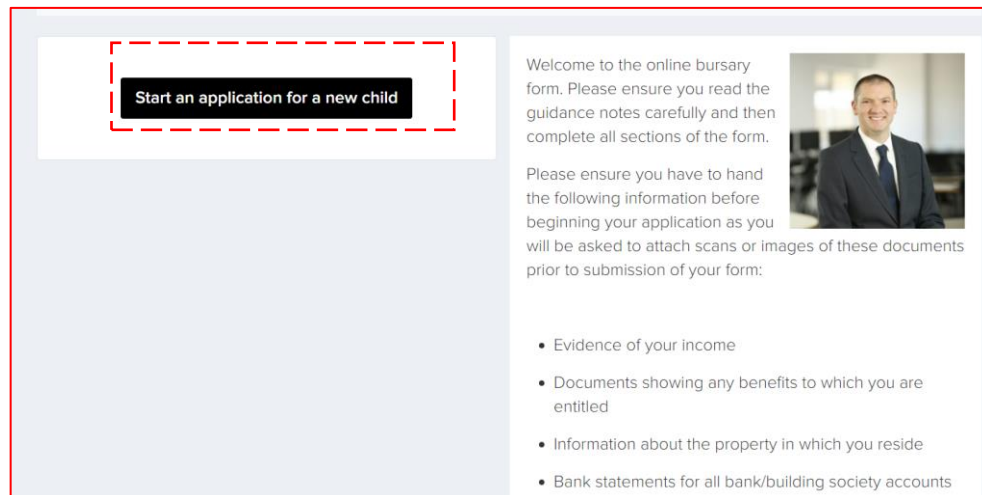
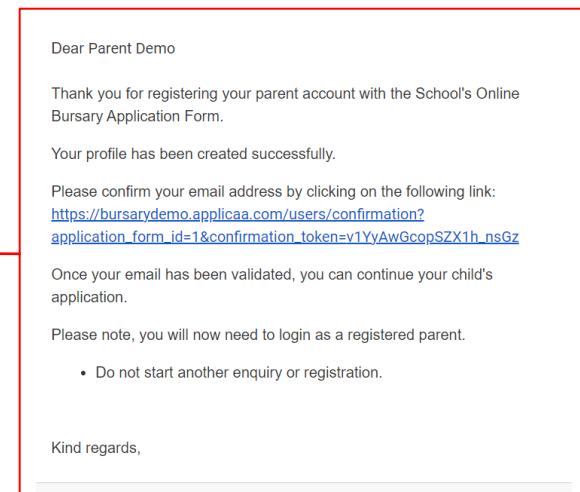*1. Parents click the register button on the home page*

2. They fill in required details and their email

4. They add their child and start the application

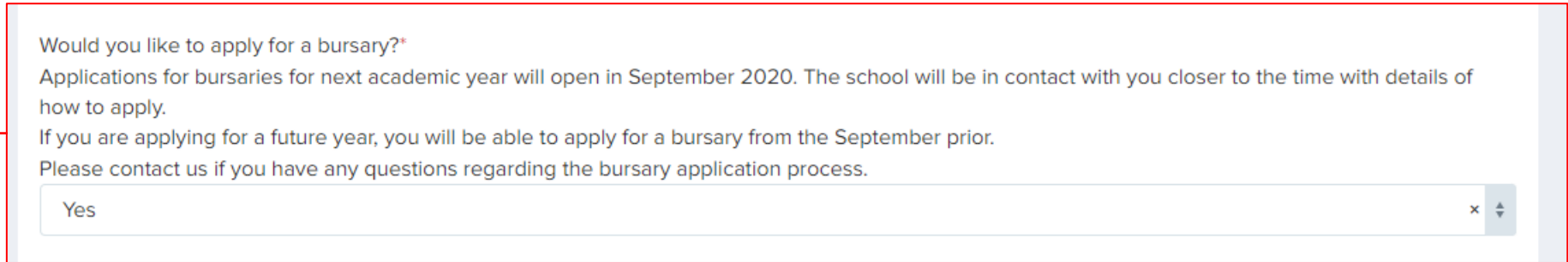
3. They click the link on the confirmation email

Dear Parent Demo

Thank you for registering your parent account with the School's Online Bursary Application Form.

Your profile has been created successfully.

Please confirm your email address by clicking on the following link:
https://bursarydemo.applicaa.com/users/confirmation?application_form_id=1&confirmation_token=v1YyAwGcopSZX1h_nsGz

Once your email has been validated, you can continue your child's application.

Please note, you will now need to login as a registered parent.

- Do not start another enquiry or registration.

Kind regards,

2. How parents apply (new bursary applications)

Schools that using both **Bursary+ & Admissions+**

For school using both Applicaa Systems, parents interested in applying for a Bursary are _automatically_ directed from the Admissions+ system to the Bursary+ Platform. They can log in using the same login details and the status will be shared back to the Admissions team automatically.

1. Parent selects 'Yes' to applying for Bursary on Admissions+
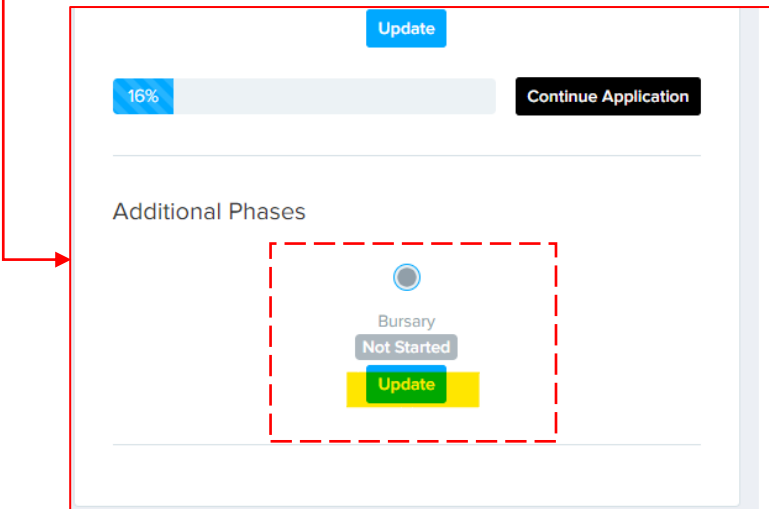
Would you like to apply for a bursary?*
Applications for bursaries for next academic year will open in September 2020. The school will be in contact with you closer to the time with details of how to apply.
If you are applying for a future year, you will be able to apply for a bursary from the September prior.
Please contact us if you have any questions regarding the bursary application process.

Yes	× ⇕

3. When they click on it, they are taken to the Bursary+ system where they log in

2. This activates the Bursary Phase on their Admissions form
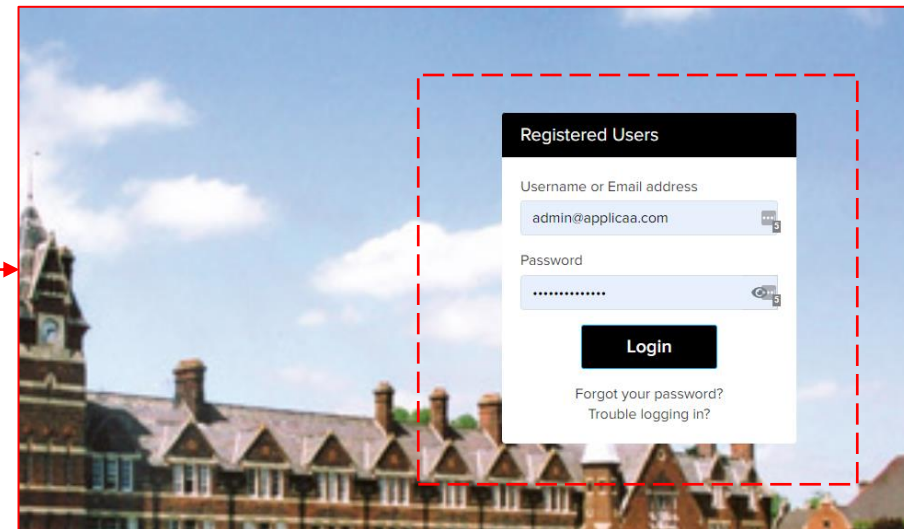
Update

16%   Continue Application

Additional Phases

Bursary
Not Started
Update

Registered Users

Username or Email address
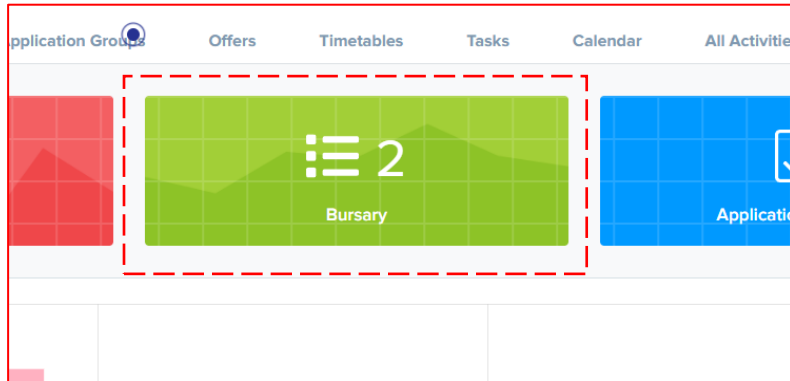admin@applicaa.com

Password
•••••••••••

Login

Forgot your password?
Trouble logging in?

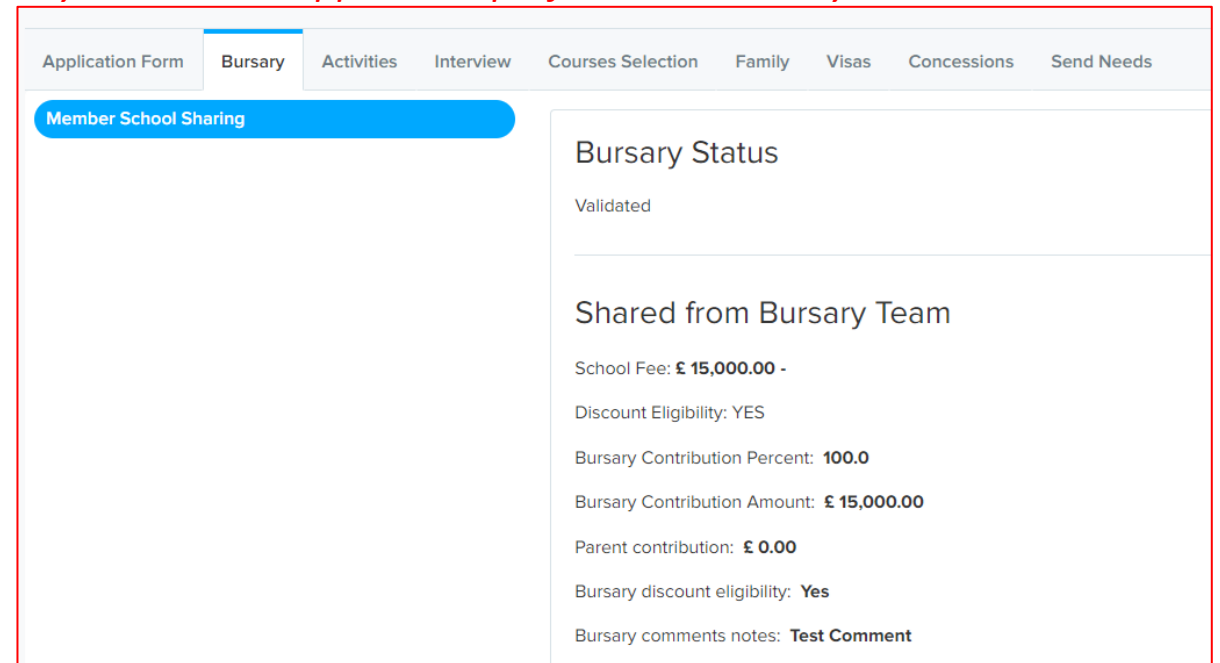# 2. How parents apply (new bursary applications)

Schools that using both Bursary+ & Admissions+

The admissions team using Admissions+ will be able to see the status of the bursary application from their dashboard and also see the bursary outcome shared from the bursary team.

1. The Bursary Applicants on the Admissions System

2. The Bursary Status is shown next to each student

3. The admissions team can see the outcome from the bursary system on the applicant's profile automatically

3. How to import existing bursary applications

You may need to import existing applications for the following reasons:

1. You are joining Bursary+ in the middle of your cycle and already have a list of parents that wanted to apply

2. You need to renew existing bursaries (see how to manage bursary renewals).

You can easily import parents with their child using a .CSV file. Once imported you are able to send a welcome email to the parent that includes their login details so they can login and renew their bursary.

Each row of the Import file must contain the following

1. One parent with at least: First Name, Last Name, Email Address

2. One child with at least their: First Name, Last Name, Application Year, Year Group

Click here to download a copy of the .CSV Import Sample File

Once you have prepared your file you will need to send it to your Customer Success Manager who will be able to have your import processed

3. How to import existing bursary applications

Once the applications have been imported, your Customer Success Manager will let you know so that you can login and send the welcome email to the parents.

The welcome email includes the website link and the details parents will use to login.

The mail-merge fields will be automatically populated when you send the email. The parts in red will need to be updated by you manually with the correct details before using the template

Here is a sample email you will use to send the link to the parents (it can be edit). **This email will be sent via the Bursary System when you are ready.**

The mail-merge fields (e.g. {{CONTACT_TITLE}} would be filled in automatically provided the data was imported for that contact.

The parts in red would need to be filled in with the correct information for your school before using the template

Sample welcome email for existing applications. This email is not for bursary renewals, click here for the renewal process.

Dear {{CONTACT_TITLE}} {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}}

Thank you for your interest in applying for {{SCHOOL_NAME}}. Please find below your login details for our online Bursary System.

Please log in and complete the bursary application form.

Email: {{CONTACT_EMAIL}}
Password: {{CONTACT_PASSWORD}}
{{LINK}}

Should you have any questions or difficulty please email *Bursar's Email Address*

Kind regards,
School Bursar
Bursar's Email Address
Bursar's Contact Number

4. How the bursary application is structured

See below for the structure of the bursary application form and the key information collected at each step

Step	Key Information Collected	Notes	Customisations Available
Step 1: Welcome	• The type of place (e.g. Day or Boarding) • Year Group Applied for	The combination of the place and the year group are used to assign the fee category	Welcome text at the top of the page can be customised
Step 2: Pupil	• Pupils Name, DOB and Address	The Bursary Application Year is set automatically to the current application year (e.g. 2022/2023) when the application is created. School Admin can manually change the year to a different one from the admin view if needed.	
Step 3: Parent	• Number of parents/legal guardians to be assessed (Father only, Mother Only or both) • Employment status of parents and employers details	Each parent also have space to say if they are self employed, provide the details of the company and their percentage ownership of the company. For split families, there is a place for the parent to add the details of the second parent and an automated link will be sent to them requesting the financial information.	
Step 4: Income	• Income for the parents/legal guardians identified in Step 3 • Benefits (selected from a drop down of options)	There a number of fields covering income from different sources. Parents cannot skip a field, if there is no value they must enter £0.00 The system automatically calculates a running grand total to help parents ensure they are entering the correct figures	Benefits drop down options can be edited (they do included current government benefits available)

4. How the bursary application is structured

See below for the structure of the bursary application form and the key information collected at each step


Step	Key Information Collected	Notes	Customisations Available
Step 5: Outgoings	• Household outgoings	The outgoings will be deducted from the total family resource available.	The list of outgoings accepted and which ones are required (e.g. Council Tax)
Step 6: Other Assets	• Value and equity of the residential home • Value and equity of other others	Other assets covered include: Other properties, Bank Account balances, Stock & Shares, Any other asset, Business ownership value	The equity bands for the residential home and other assets can be customised.
Step 7: Dependent Children	• Names of dependent children • Whether the family already receives support for paying fees and how much	For each dependent child, the system can automatically give an allowance	The allowance per child can be customised (e.g. £5,000 per child)
Step 8: Continuation	• Any supporting information	Optional step for parents to share any information they feel is relevant	Can be turned off, or a word limit applied
Step 9: Bursary Summary		Summarise the totals from the previous steps: Income, Other Assets, House Equity, Bank Accounts, Other Properties, Stocks & Shares, Business Net Value, Outgoings	
Step 10: Submission		Declaration for patents to confirm they have completed the information accurately. Once submitted the main application would become locked so it can't be changed	
Phase 2: Documents		After the main application form, the parents can enter the documents phase where they can attach financial evidence.	

5. How the Bursary Calculator Works

The Bursary+ System will automatically recommend a Bursary outcome based on the figures collected from parents.

[Click here](#) to watch a summary of how the Bursary Calculator works and how you can make changes to it

Watch time 13 minutes.

6. How the partner financial assessment works

Bursary⁺
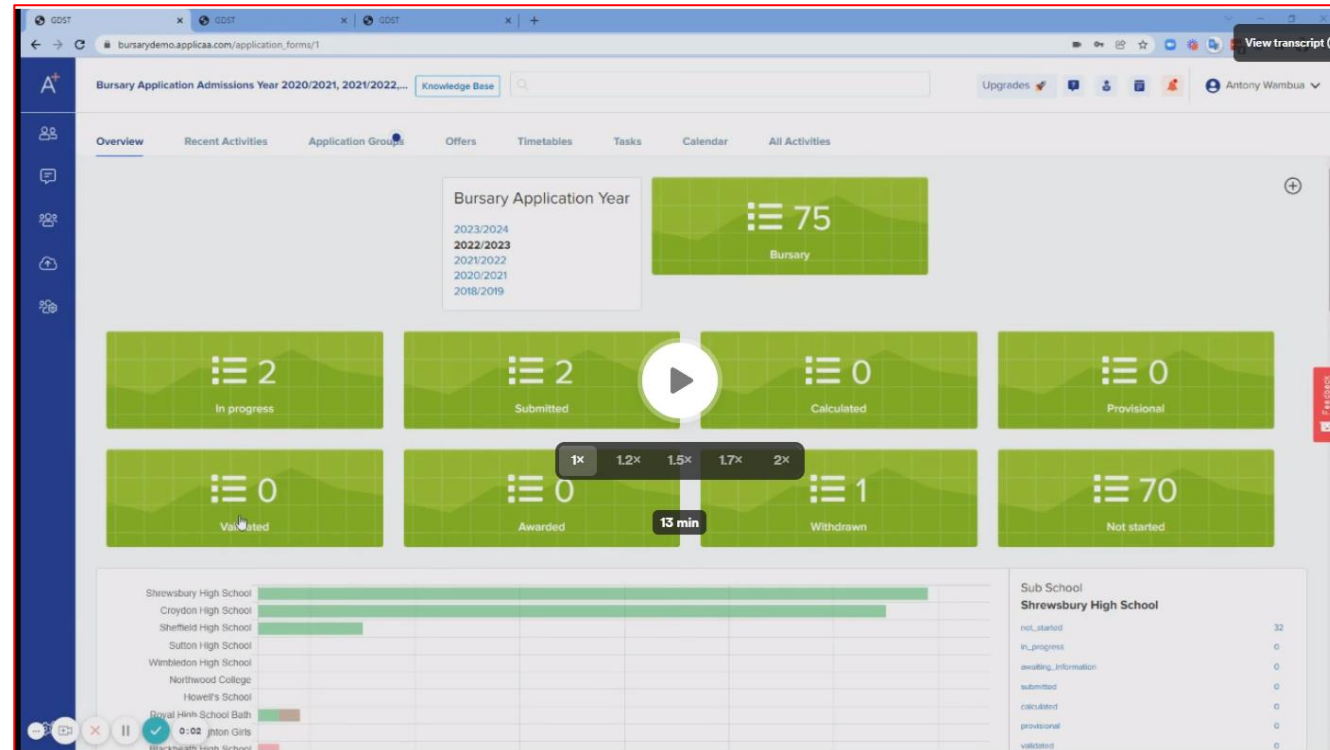
On Step 3 of the application form (parent information), the parents select the number of parents/legal guardians to be assessed (Father only, Mother only or both).

If they select only one parent (i.e. split family), the second parent may still need to be assessed if they meet the criteria of being **'financially responsible'.**

Partner Financial Declaration

Please see here for our definitions of parents/applicants.

Based on the definitions of parents/applicants above, does a second person need to be considered in the financial assessment?*

◉ Yes   ○ No

Partner's Details

Please provide the other parent's/partner's details below.

Partner First name*

First Name

Partner Last name*

Last Name

Partner Email*

Partner Relationship*

Telephone

Telephone Mobile*

Selecting a single parent triggers this section at the bottom of step 3.

The parent reviews the definition of parents/applicants and they answer whether a second person need to be considered for financial assessment.

Selecting 'Yes' reveals this section where they provide the name and contact information of the second person. When this application is submitted, the second person receives a link asking them to complete the financial assessment.

6. How the partner financial assessment works

Here is a copy of the email that is automatically sent to the second partner for them to complete the financial assessment.

This is a standard email but it can be edited if requested.

Partner financial assessment invitation email

Dear {{CONTACT_FIRST_NAME}} {{CONTACT_LAST_NAME}}

We are writing with regards to an application for a bursary {{STUDENT_FIRST_NAME}} {{STUDENT_LAST_NAME}} for {{SCHOOL_NAME}}.

In accordance with our assessment criteria and guidance, it has been noted that in order to proceed with the assessment, we require you to complete a declaration of your income and assets.

Please click on the link below to follow the request

{{LINK}}

This form will ask you to declare your own individual financial circumstances, which we respect as strictly private and confidential between yourself and the School.
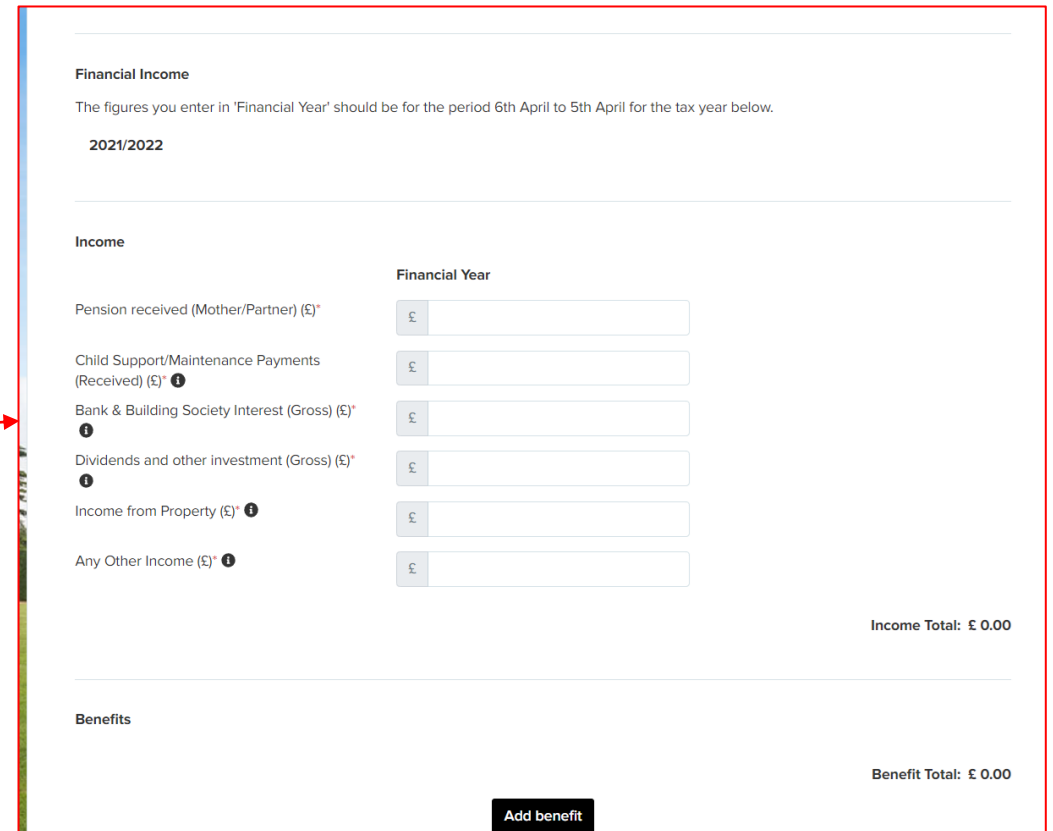
Kind regards,
School Bursar
Bursar's Email Address
Bursar's Contact Number
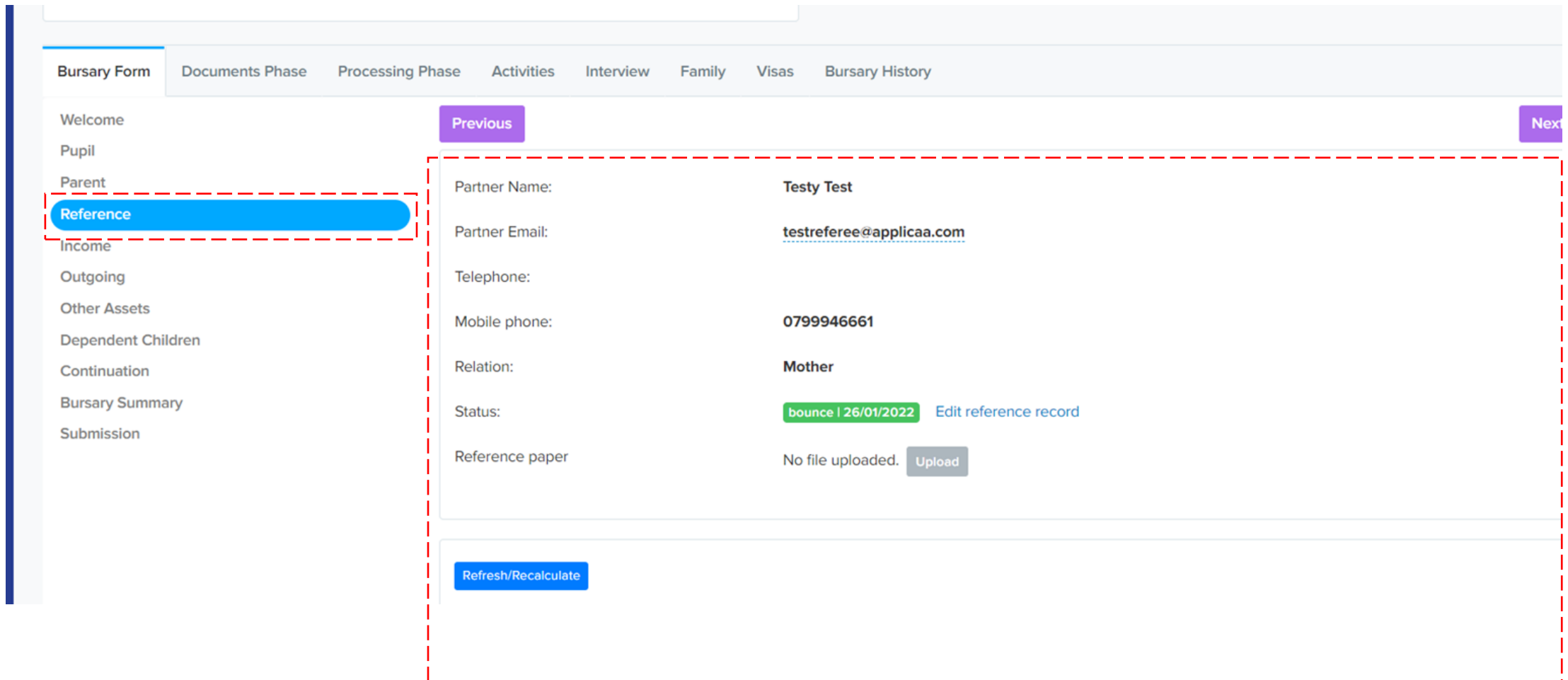
Clicking the link, takes the partner to a secure form to complete the financial assessment. The link is open until the form is submitted after which it becomes read only.

Financial Income

The figures you enter in 'Financial Year' should be for the period 6th April to 5th April for the tax year below.

2021/2022

Income

	Financial Year
Pension received (Mother/Partner) (£)*	£
Child Support/Maintenance Payments (Received) (£)* ⓘ	£
Bank & Building Society Interest (Gross) (£)* ⓘ	£
Dividends and other investment (Gross) (£)* ⓘ	£
Income from Property (£)* ⓘ	£
Any Other Income (£)* ⓘ	£

Income Total: £ 0.00

Benefits

Benefit Total: £ 0.00

Add benefit

6. How the partner financial assessment works

If a partner financial assessment has been requested, you will be able to view it here on the applicant profile

# 7. Reviewing and processing application forms

Once parents have submitted a bursary application you will be able to process it and confirm the information provided.

Key Tasks will involve:

1. Checking the sums provided and making changes where necessary to produce an initial outcome

2. Checking documents submitted

3. Updating the status of the application as you move it through the checking process

4. Communicating with parents where necessary by sending emails or making a phone call

Click here to watch a summary of how to process a bursary application
Watch time 13 minutes.
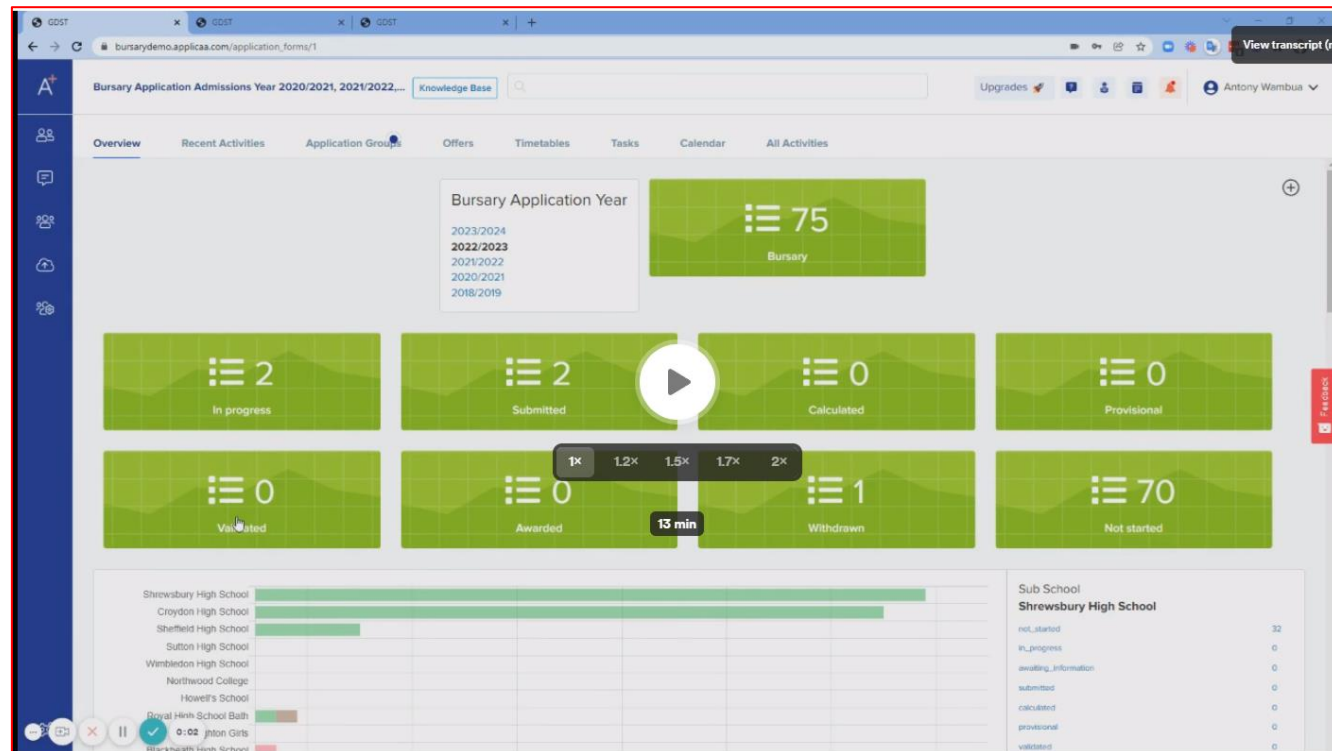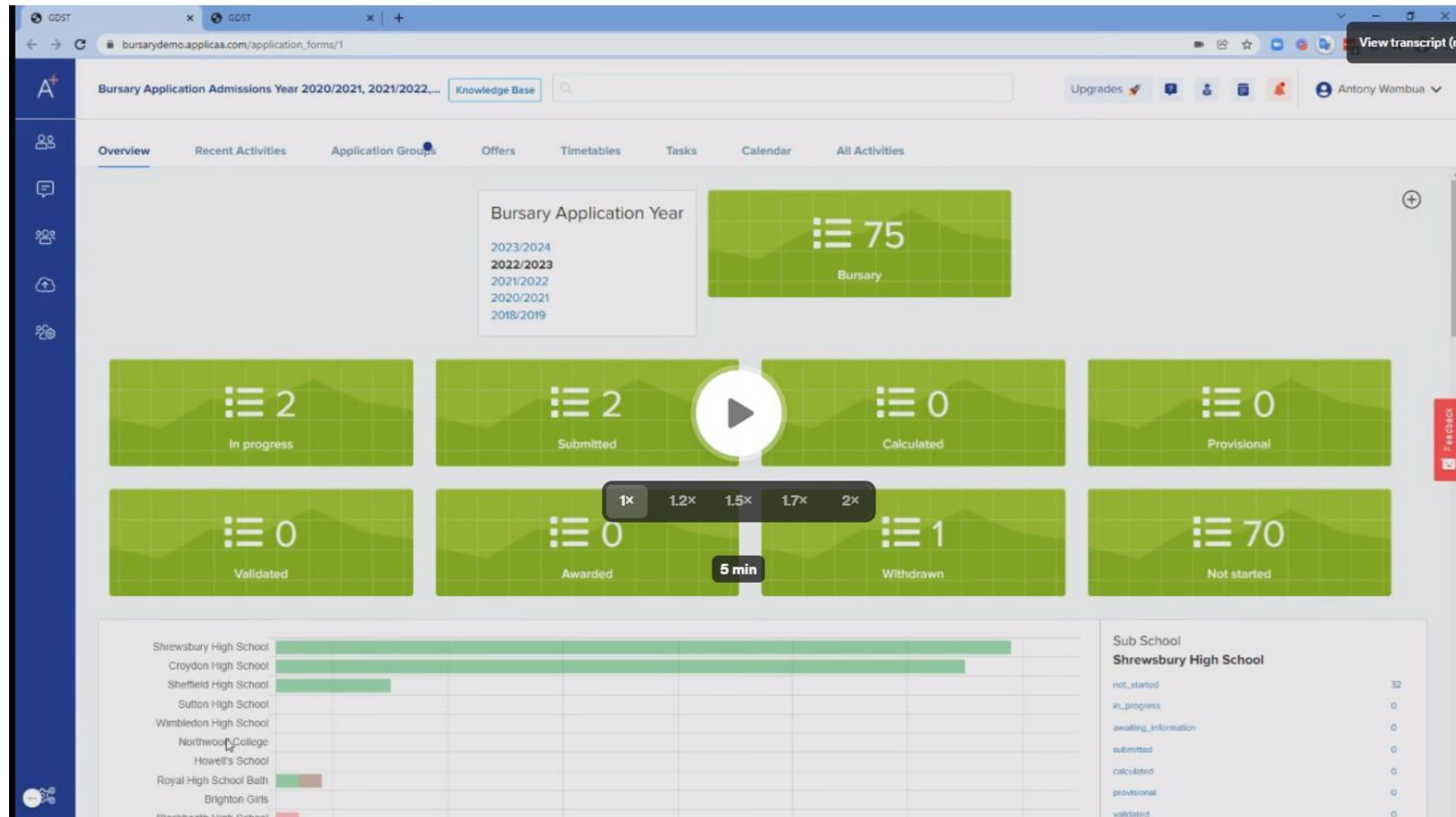
8. Definition of application statuses on the bursary system

Definition of 'FORM STATUS'	
Not started	Application (child profile) has been created by the parent, but the application has not been started.
In Progress	The parent/applicant is currently completing the form but has not finished or fully submitted the form. If the status has not changed for some time, the parent may need to be contacted to see if there is an issue with completing the form.
Awaiting Information	Where the user has selected that they are part of a split family, and the second parent is required to complete figures to support the application.
Submitted	The parent/applicant has submitted their form successfully. They will receive notification of this. The next step is for them to upload supporting evidence on the document phase.
Calculated	An initial calculation on the outcome is carried out once the form is submitted but without any supporting documentation form the parents. The parent should be sent an email informing them that their documentation has not yet been received.
Provisional	A fairly good assessment of the application has been carried out, but further information or documents is required. The parent will receive an email asking for documentation if required.
Validated	The assessment has been completed and information shared with the school admissions team. The parent will receive an email updating them.
Awarded	The school have awarded a bursary. Applications will usually only be updated to the Awarded status just prior to billing once all of the relevant paperwork from the school is received.
Withdrawn	The parent/applicant has chosen to withdraw their application and has advised the school as such.
Closed	The application has been unsuccessful. This is usually communicated to parents at the same time awarded applicants are notified.

9. Communicating with parents

Please **click here** to see a video showing how you can send personalise groups and individual emails to parents.

Watch time 5 minutes.

10. Managing bursary renewals

The bursaries system offers you a tidy and time saving process of renewing bursary application each year.

You are able to mark bursaries that are approved for renewal and then send an email to parents with instructions on how they can log in and renew the application.

When the new renewal application is created the application is automatically:

1. Progressed up by one year group (e.g. from year 7 to year 8)

2. Promoted to the next bursary application Year (e.g. from 2021/2022 to 2022/2023)

3. You will be able to go back to look at the old application from the last year very easily

There are only two steps to activate renewals!

1. Select bursaries to renew and mark them for renewal

2. Send parents email to let them know renewal are open

[Click here](#) to see the video on how to activate bursary renewals.

Watch time 5 minutes.
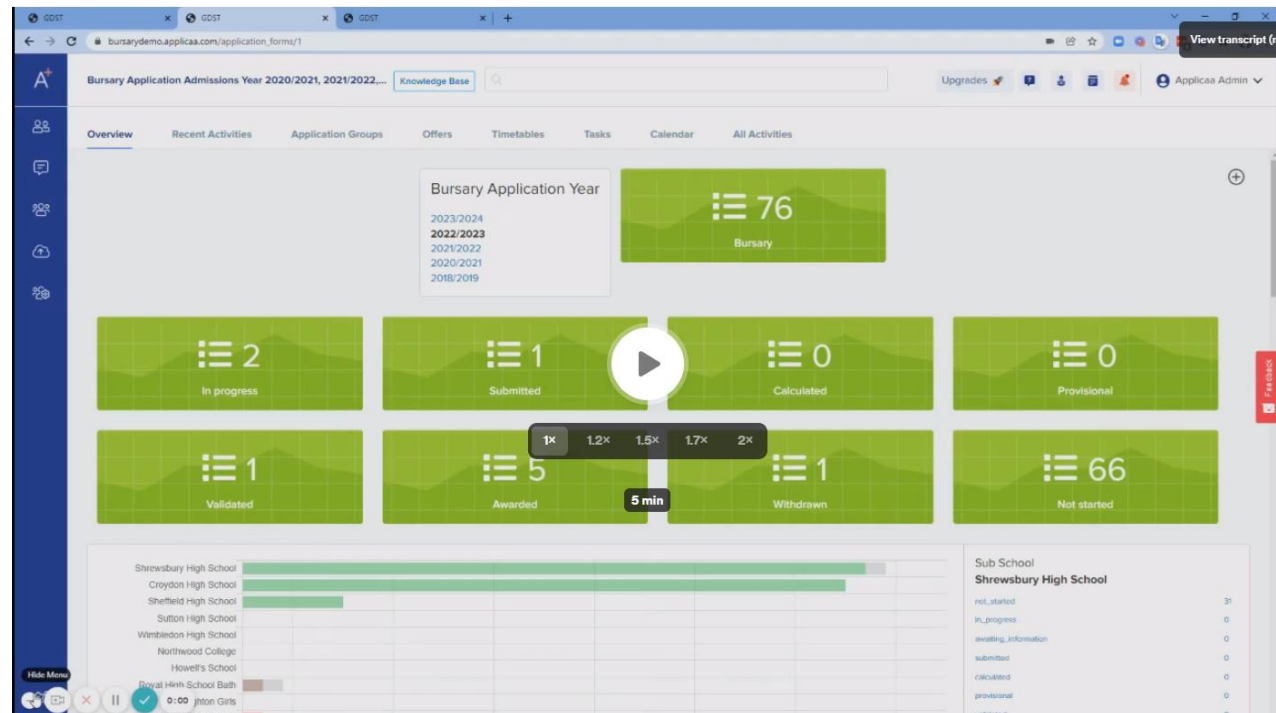
10. Managing bursary renewals

Here is a sample email you could use to notify parents about **renewing their child's bursary** (it can be edited)

This email will be sent via the Bursary System when you are ready.

The mail merge fields (e.g. {{CONTACT_TITLE}} would be filled in automatically provided the data was imported for that contact.

The parts in red would need to be filled in with the correct information for your school before using the template

Bursary renewal email

Dear {{CONTACT_TITLE}} {{CONTACT_LAST_NAME}},

As you are aware, {{STUDENT_FIRST_NAME}} currently holds a Bursary. All Bursaries are reviewed annually to ensure that they are at the appropriate level and still required.
You are now invited to complete the online application for the annual renewal of your bursary.

Click here (Bursary system Link) to log into the online bursary system using the same username and password used last year.

Please ensure you select the **Renewal button** to complete your application once logged in.

The deadline for submission of your application is ***deadline*.**

We will contact you once the review is complete, and the level of bursary for ***bursary application year*** has been ratified.

Should you have any questions regarding the completion of the application please do not hesitate to contact a member of the bursary team, contact details are below.
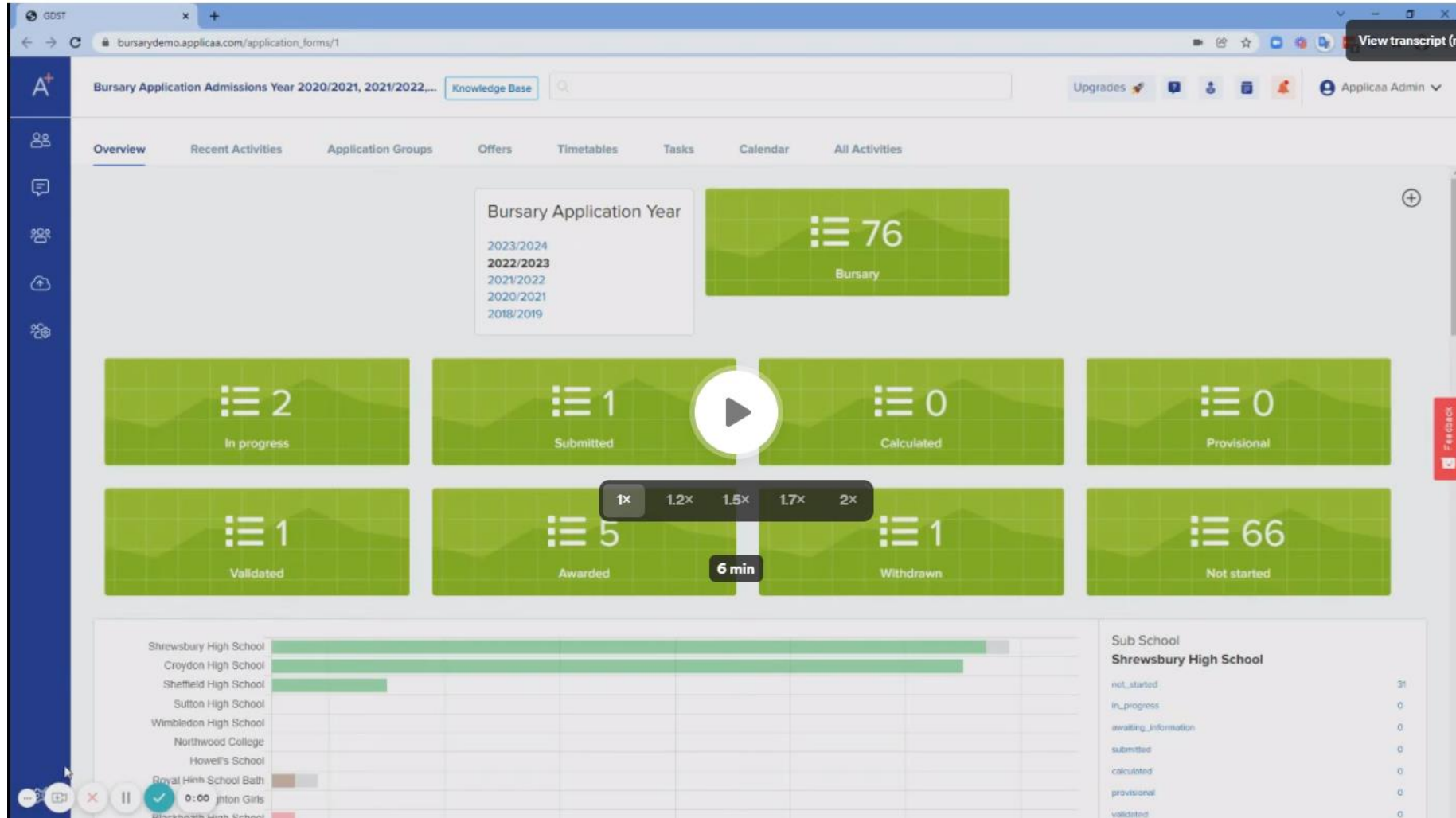
Kind regards,
School Bursar
Bursar's Email Address
Bursar's Contact Number

11. Managing fees, equity band bursary bands

Please **click here** to see the video on how managing fees, equity bands, and bursary bands.

Watch time 6 minutes

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With Us

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🌐 www.appliaa.com