



# Learning Provider Portal Quick Guide

## Loan Facility Details

From October 2017, the Education & Skills Funding Agency has the ability to send a Learning Provider(s) Loan Facility Amount for an Academic Year at any time via the existing web service. Once the data has successfully loaded, SLC creates a Loan Facility Record for each Learning Provider.

The Loan Facility Record will contain the following fields:

### Example for AY 2018/19

- Contract End Date
- Loan Facility Start Date: 01/08/2017
- Loan Facility End Date: 31/07/2018
- Loan Facility Allocation Amount: £1000.00
- Loan Facility Amount Used: £0.00
- Loan Facility Percentage Used: 0%
- Loan Facility Amount Remaining: £1000.00

If you have the LP Financials Administrator Role, you can view this information by selecting the 'Loan Facility Details' tab within the Financials Home screen.

The screenshot shows the 'Financials Home' screen with a navigation bar at the top containing: Home, Select LP, Maintain Groups, Administer User, Learning Provider Details, and Applicant Information Service. Below this, a sub-menu includes: Loan Position Report, Remittance Report, Loan Facility Details (highlighted with a red box), and Payment Instalment Report. A 'Sign out' link is visible in the top right. The main content area contains a message: 'This area of the portal allows you to view financial reports for your organisation. If you require any further assistance, you can contact the Operations Helpdesk on 0300 100 0643 or use the guidance material which can be found at <http://lpservices.slc.co.uk/>'. A 'HELP' button is located in the bottom right corner.

Next, select the relevant Academic Year then click on 'Display Details'.

Loan Facility Details

Academic Year  
18/19

Display Details

HELP

The following screen will then be displayed with a read only set of results which are correct as at close of business the previous night. An overnight batch runs daily which updates the results accordingly.

Please note that the details returned on this report will be correct as at the close of business last night.

Academic Year 18/19

|                                 | Details       | Message |
|---------------------------------|---------------|---------|
| Contract End Date               | 01/01/2020    |         |
| Loan Facility Start Date        | 01/08/2018    |         |
| Loan Facility End Date          | 31/07/2019    |         |
| Loan Facility Allocation Amount | £1,000,000.00 |         |
| Loan Facility Amount Used       | £66,419.56    |         |
| Loan Facility Percentage Used   | 6.64%         |         |
| Loan Facility Amount Remaining  | £933,580.44   |         |

Close

**Please Note:** The 'Loan Facility Amount Used' figure is calculated using all scheduled instalments. This includes scheduled instalments for learners whose course may have started in a previous Academic Year and are still in learning. It is updated by the overnight batch taking into account all Change of Circumstances performed on that day which reduce/increase this figure.

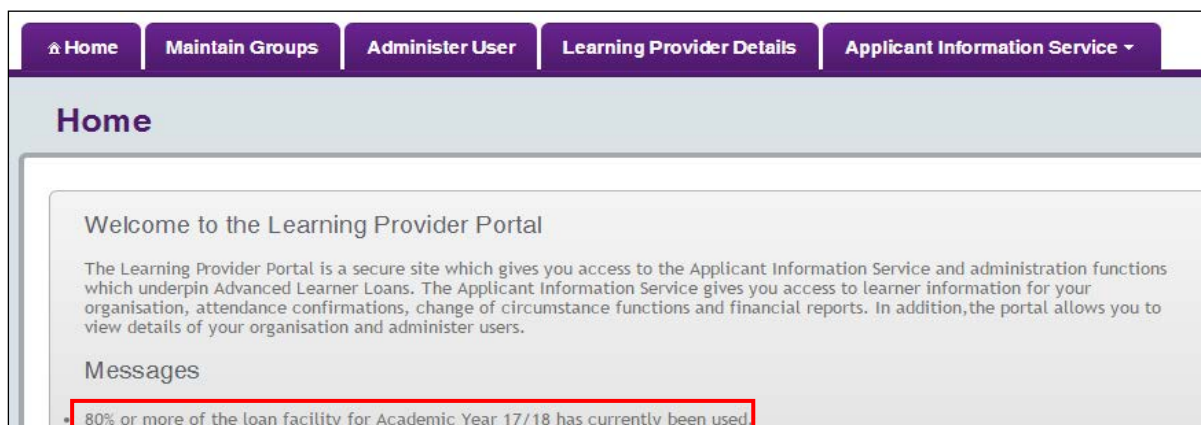
To identify the Learners that make up this figure you can export the CSV Payment Schedule & Attendance Report from the Learner Information Screen and filter on **Academic Year only**. Next, filter on column L 'Scheduled Payment Date' and select all dates between 1 August and 31 July, for the Academic Year. Then, total column N 'Payment Amount'.

In order for the two figures to match, you should run the report as early as possible in the morning so that it is not long after the batch has run the previous night and before processing of new applications and Change of Circumstances take place that day.

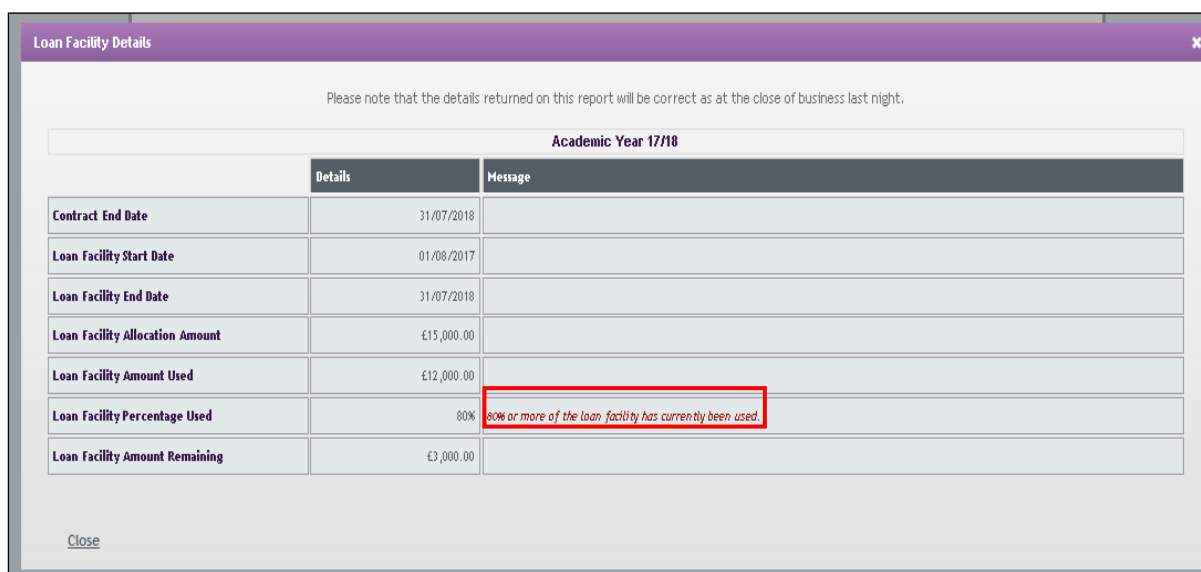
## Loan Facility Warning Messages

### Loan Facility Used = 80%

When a Learning Provider reaches 80% Used for any Academic Year, a warning message will be displayed on the Learning Provider Portal Home page within the message section and on the Loan Facility Details screen, as shown below.



The screenshot shows the Learning Provider Portal Home page. The navigation bar includes Home, Maintain Groups, Administer User, Learning Provider Details, and Applicant Information Service. The main content area has a 'Home' header and a welcome message. Below the welcome message is a 'Messages' section with a single message: '80% or more of the loan facility for Academic Year 17/18 has currently been used.' This message is highlighted with a red box.



The screenshot shows the Loan Facility Details screen for Academic Year 17/18. It includes a table with columns for Details and Message. The table contains the following data:

|                                 | Details    | Message   |
|---------------------------------|------------|---|
| Contract End Date               | 31/07/2018 |   |
| Loan Facility Start Date        | 01/08/2017 |   |
| Loan Facility End Date          | 31/07/2018 |   |
| Loan Facility Allocation Amount | £15,000.00 |   |
| Loan Facility Amount Used       | £12,000.00 |   |
| Loan Facility Percentage Used   | 80%        | 80% or more of the loan facility has currently been used. |
| Loan Facility Amount Remaining  | £3,000.00  |   |

The message '80% or more of the loan facility has currently been used.' is highlighted with a red box. A 'Close' button is visible at the bottom left of the screen.

## Loan Facility Warning Email

### Loan Facility Used = 90%

When a Learning Provider reaches 90% Used, a warning Email is sent to the Primary and Secondary Contacts at the Learning Provider. The email will advise:

**Subject:** Learning Provider Portal – Advanced Learner Loan – Facility Used

Dear Colleague,

**Important – Please Read.....**

90% or more of your Advanced Learner Loan Facility for Academic Year 17/18 has currently been used. You may want to consider this when recruiting further learners.

This email is for information purposes only.

Yours sincerely

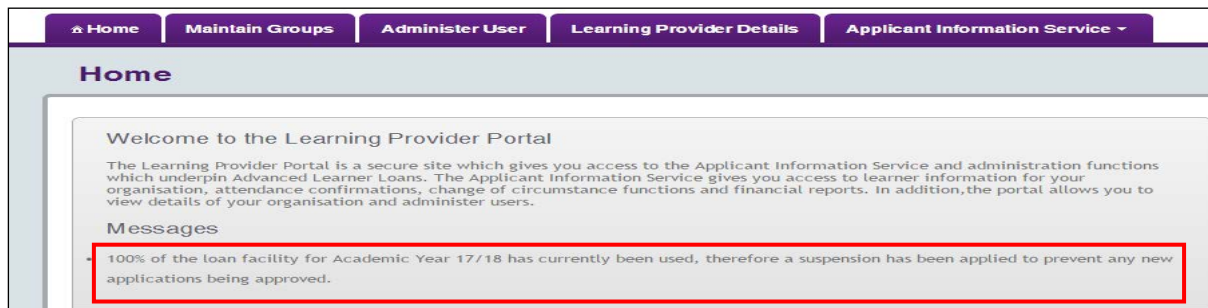
Student Loans Company

Please do not reply to this email. It has been automatically produced from an address which cannot accept incoming mail.

## Loan Facility Warning Messages and Further Email

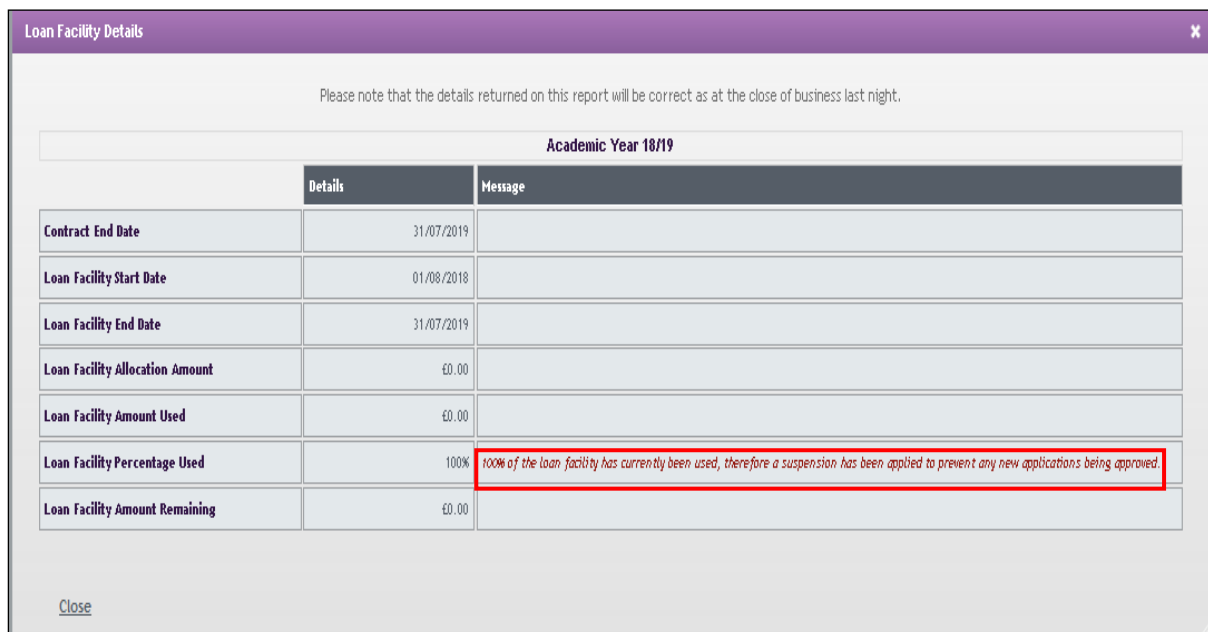
### Loan Facility Used = 100%

When a Learning Provider reaches 100% Used for any Academic Year, a warning message will be displayed on the Learning Provider Portal Home page within the message section and on the Loan Facility Details screen. A further Email will also be sent, as detailed below:



The screenshot shows the Learning Provider Portal Home page. The navigation bar includes Home, Maintain Groups, Administer User, Learning Provider Details, and Applicant Information Service. The main content area has a 'Home' header and a welcome message. Below this is a 'Messages' section with a red-bordered box containing the following text:

100% of the loan facility for Academic Year 17/18 has currently been used, therefore a suspension has been applied to prevent any new applications being approved.



The screenshot shows the Loan Facility Details screen. It includes a disclaimer: "Please note that the details returned on this report will be correct as at the close of business last night." Below this is a table for Academic Year 18/19. The table has two columns: 'Details' and 'Message'.

|                                 | Details    | Message  |
|---------------------------------|------------|--|
| Contract End Date               | 31/07/2019 |  |
| Loan Facility Start Date        | 01/08/2018 |  |
| Loan Facility End Date          | 31/07/2019 |  |
| Loan Facility Allocation Amount | £0.00      |  |
| Loan Facility Amount Used       | £0.00      |  |
| Loan Facility Percentage Used   | 100%       | 100% of the loan facility has currently been used, therefore a suspension has been applied to prevent any new applications being approved. |
| Loan Facility Amount Remaining  | £0.00      |  |

A 'Close' link is visible at the bottom left of the screen.

**Please Note:** An automatic Service Restriction will be applied preventing any new applications for that Academic Year being approved. Any applications with an application received date prior to the restriction effective date (ie. applications sitting at Missing Evidence, Eligibility incomplete and Auto-Cancelled) will still be approved. The email will advise:

**Subject:** Learning Provider Portal – Advanced Learner Loan – Facility Used

Dear Colleague,

**Important – Please Read.....**

100% of your Advanced Learner Loan Facility for Academic Year 17/18 has currently been used, therefore a suspension has been applied to prevent any new applications being approved. Please ensure you do not recruit any further learners at this time.


If you require any further information please contact your Provider Manager at the Education & Skills Funding Agency (ESFA).

Yours sincerely  
Student Loans Company

Please do not reply to this email. It has been automatically produced from an address which cannot accept incoming mail.

**Contract End Date**

When a Learning Provider's Contract End Date is prior to the Loan Facility End Date, a warning message will be displayed on the Learning Provider Portal Home page within the message section and on the Loan Facility Details screen as detailed below:



Loan Facility Details

Please note that the details returned on this report will be correct as at the close of business last night.

Academic Year 17/18

|                                 | Details    | Message  |
|---------------------------------|------------|--|
| Contract End Date               | 08/11/2017 | Please Note: The Contract End Date is prior to the Loan Facility End Date. Applications with a Start Date after the Contract End Date will be deemed ineligible. |
| Loan Facility Start Date        | 01/08/2017 |  |
| Loan Facility End Date          | 31/07/2018 |  |
| Loan Facility Allocation Amount | £0.00      |  |
| Loan Facility Amount Used       | £0.00      |  |
| Loan Facility Percentage Used   | 100%       | 100% of the loan facility has currently been used, therefore a suspension has been applied to prevent any new applications being approved.                       |
| Loan Facility Amount Remaining  | £0.00      |  |

[Close](#)