PFS – CGS & HECS–HELP User Guide

A guide on how to use the estimates system to record CGS & HECS–HELP estimates

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Introduction

Purpose
Higher education providers who receive Commonwealth Grant Scheme (CGS) and Higher Education Contribution Scheme – Higher Education Loan Program (HECS–HELP) funding are required to use HEIMS Online to submit estimates for advance funding for these programs.

This document provides instructions on how to use the estimates system to record CGS & HECS–HELP estimates.

The Program Funding application web pages allow providers to record and submit CGS & HECS–HELP estimates online.

Timing of Estimates
With the introduction of the online system, there is no change to submission periods.

The estimates are due on 1 April and 1 October each year.

The web pages will be accessible to enter estimates in early March and early September each year.

You will be advised via email when the web pages are open to enter estimates and the date the submission period will close.

Access to make changes to estimates data will only be available during this period.

History Reports
The online system will make available reports from previous submission periods.

History reports of the final submitted data from previous reporting periods will be available where recorded in the system.

The application will start with a history report of the estimates submitted in Estimates Period 1 (April 2017 submission).
CGS & HECS–HELP Process Flow

Different web pages have been developed for Table A and non–Table A providers to take into account the different data to be provided:

- **Table A providers** record CGS estimates by clusters and campus within the CGS estimates web pages.

- **Non–Table A providers** have access to view the CGS funding and how it is allocated and only record CGS estimates as a total by cluster with the HECS–HELP estimates web pages.

There is also a difference in the web pages to confirm and sign off estimates:

- Table A providers must confirm the CGS estimates **before** the HECS–HELP can be confirmed. CGS estimates and HECS–HELP are signed–off together.

- Non–Table A providers need only confirm and sign off the HECS–HELP estimates.
Table A providers only

Figure 1: Program Funding application process flow and activity diagram – Table A providers

Open submission period
Administrator

Record estimates
Program Officer

Confirm data entry
Program Officer

Sign off submission
Approver

Close submission period
Administrator
Non–Table A providers only

Figure 2: Program Funding application process flow and activity diagram – non–Table A providers

<table>
<thead>
<tr>
<th>OPEN SUBMISSION PERIOD</th>
<th>Program Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>DRAFT</td>
</tr>
<tr>
<td>Set up and open new estimate submission period</td>
<td>IN PROGRESS</td>
</tr>
<tr>
<td></td>
<td>NO</td>
</tr>
<tr>
<td>Are all edits entered?</td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>CONFIRM DATA ENTRY</td>
<td>Program Officer</td>
</tr>
<tr>
<td>Confirm HECS-HELP estimates</td>
<td>CONFERMED</td>
</tr>
<tr>
<td>Are the numbers correct?</td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>SIGN-OFF SUBMISSION</td>
<td>Approver</td>
</tr>
<tr>
<td>Confirms VC/CFO approval and sign off estimates</td>
<td>SIGNED-OFF</td>
</tr>
<tr>
<td>Is the data correct?</td>
<td></td>
</tr>
<tr>
<td>YES</td>
<td></td>
</tr>
<tr>
<td>Is the data approved by VC/CFO?</td>
<td></td>
</tr>
<tr>
<td>NO</td>
<td></td>
</tr>
<tr>
<td>CLOSE SUBMISSION PERIOD</td>
<td>Administrator</td>
</tr>
<tr>
<td>Unlock submission (process emailed request)</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Finalise data and close submission period</td>
<td></td>
</tr>
<tr>
<td>Estimates period status = CLOSED History reports for period available</td>
<td></td>
</tr>
</tbody>
</table>

Are all edits entered?

Are the numbers correct?

Do you want to alter the signed-off data?

Is the request after the end date for submissions?
CGS & HECS–HELP Estimates Processing

Processing CGS (Table A providers only)

For *Estimates Period 1 (April)*, provide the following CGS estimates:

- Non–designated place estimates for the *current* year and the following *three* years
- Designated place estimates for the *current* year; and
- Campus undergraduate and postgraduate place estimates for the *current* year

For *Estimates Period 2 (October)*, provide the following CGS estimates:

- Non–designated place estimates for the *current* year and the following *four* years;
- Designated place estimates for the *current* year; and
- Campus undergraduate and postgraduate place estimates for the *current* year.

Processing HECS–HELP estimates

For *Estimates Period 1 (April)*, provide the following HECS–HELP estimates for the *current* year:

- Provider estimated EFTSL (non–Table A providers only);
- Funding sub–cluster percentage splits;
- WEI EFTSL;
- Enabling EFTSL;
- Other Commonwealth supported EFTSL;
- Grandfathering clause percentage splits;
- Student contribution amount, if lower than the pre–set maximum amount; and
- Payment type percentage splits.
For *Estimates Period 2 (October)*, provide the following HECS–HELP estimates for both the *current* year and the *following* year:

- Provider estimated EFTSL (non–Table A providers only);
- Funding sub–cluster percentage splits;
- WEI EFTSL;
- Enabling EFTSL;
- Other Commonwealth supported EFTSL;
- Grandfathering clause percentage splits;
- Student contribution amount, if lower than the pre–set maximum amount; and
- Payment type percentage splits.

**Signing–off Estimates**

When adjustments to both CGS & HECS–HELP estimates are completed and have been confirmed, the estimates are ready to be signed off.

**Note:** Non–Table A providers only record CGS estimates within the HECS–HELP web pages.

**Before Starting**

The *Program Funding* application is located within HEIMS Online. HEIMS Online is accessed through the [Education Portal](#).

To apply for access to CGS & HECS–HELP estimates, select the appropriate role for CGS & HECS–HELP for the user in the *Program Funding* application in the [Access to HEIMS applications form](#) and send the completed form to [HEIMS.datacollections@education.gov.au](mailto:HEIMS.datacollections@education.gov.au) for processing.

If you already have access to HEIMS Online, you will still need to submit a form with the *Amend User Access* checked. The additional role(s) selected for the *Program Funding* application will be added to your profile.

The access roles for CGS & HECS–HELP are:

- **Program Officer** – update, save and confirm CGS & HECS–HELP estimates data
- **Approver** – indicate Vice–Chancellor, Chief Executive Officer and/or Chief Financial Officer approval and sign–off CGS & HECS–HELP estimates data
- **Review (Read Only)** – view CGS & HECS–HELP estimates data only

All three roles have access to view history reports and current data reports.
A user can be assigned one or more access roles (i.e., to enter and approve estimates data).

Separate roles have been set up to support a quality assurance process and it is recommended that different users are assigned as the Program Officer and Approver.

Logging into HEIMS Online

Program Funding is accessed from HEIMS Online through the Education Portal.

Technical Issues/Support

Problems in using the system or technical issues should be raised with the following:

- HEIMS.datacollections@education.gov.au – for issues relating to system access
- FEP@education.gov.au – for issues relating to estimates processing
Access to CGS & HECS–HELP

If you have been given access to any program in the Program Funding application, the Program Funding button will display in the HEIMS Online navigation bar.

There are several programs that can be accessed by selecting Program Funding from the HEIMS Online navigation bar.

Individual users will only see the programs in the Program Funding navigation bar where they have been given access.

The CGS & HECS–HELP home page is accessed by selecting CGS/HECS–HELP when the Program Funding application menu has been expanded. Select CGS/HECS–HELP.
Web Page Features

Login Id and Time

User login id and time are always displayed on the top right of the screen.

When entering data, it is recommended that changes be saved at regular intervals.

The system times--out when there has not been any activity in a 20 minute period. Any data that have not been saved will be lost.

The time displayed on the web page is the last time the web page was refreshed.
Navigation Bar

The navigation bar can be found on the left hand side of the screen. In the Program Funding application, there are three levels of web pages:

- **Program Funding Home Page**
  - Select this option to list all funding programs that are available for the user’s access level.

- **Program Home Page**
  - Select this option to list all program sections available for the selected program.
  - From time to time, information specific to the submission period will be published in the News section on the program home page.

- **Program Section**
  - Lists all the web pages available for the program.
  - Select the program section to display the web page where data can be entered or view.

- **Details Web Pages**
  - Individual web pages for data entry or to view data.

Options displayed in the navigation bar will depend on the access level of the person logged on. Users will only be able to see the screen(s) they have access to view/edit.

**Note:** As web pages are selected in the navigation bar, they will be highlighted. Select the CGS & HECS–HELP option to return to list all the CGS & HECS–HELP program sections.

Breadcrumbs

Breadcrumbs identify the path that has been taken to get to the current web page.

Previous pages in the path are displayed as a hyperlink which can be used to return directly to that page.

The current page is displayed as the final element in the breadcrumbs.

Breadcrumbs provide a quick method of returning to any previous web pages without using the navigation bar.

Header Details

Header details are always displayed at the top of every web page. The header details provide information specific to the web page that you are on.
**Download Report Link**

Click *Download Report* to export the data displayed on the web page to Excel.

*Only data that has been saved will be available in the report.*

**Year Tabs**

Year tabs are provided to indicate the number of years that data is required to be provided:

<table>
<thead>
<tr>
<th>CGS Estimates (Table A providers only)</th>
<th>Estimates Period 1</th>
<th>Estimates Period 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimates EFTSL</td>
<td>Current year and the following <em>three</em> years, e.g. 2017 to 2020</td>
<td>Current year and the following <em>four</em> years, e.g. 2017 to 2021</td>
</tr>
<tr>
<td>Campus EFTSL</td>
<td>Current year ONLY</td>
<td>Current year ONLY</td>
</tr>
<tr>
<td>Payment Summary</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g. 2017 to 2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CGS Estimates (non–Table A providers only)</th>
<th>Estimates Period 1</th>
<th>Estimates Period 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGS Estimated Funding</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g., 2017 to 2018</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HECS–HELP Estimates</th>
<th>Estimates Period 1</th>
<th>Estimates Period 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Load</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g., 2017 to 2018</td>
</tr>
<tr>
<td>Student Status Split</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g., 2017 to 2018</td>
</tr>
<tr>
<td>Student Contribution Liabilities</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g., 2017 to 2018</td>
</tr>
<tr>
<td>Payment Split</td>
<td>Current year ONLY</td>
<td>Current year and the following <em>next</em> year, e.g., 2017 to 2018</td>
</tr>
</tbody>
</table>
HECS–HELP Estimates | Estimates Period 1 | Estimates Period 2
---|---|---
Payments Estimates | Current year ONLY | Current year and the following next year, e.g., 2017 to 2018

Panels
Information within each web page is sometimes presented in a number of panels on the page.

Clicking on the panel bar opens and closes these panels:

- On initial access, only the first panel is fully expanded with all remaining panels collapsed.
- Where the panel is fully expanded, clicking on the panel bar collapses the panel.
- Where the panel is collapsed, clicking on the panel bar expands the panel.

The number of panels on a web page will depend on both the information and the year being displayed.

Footnotes
Footnotes are provided to explain how data is processed and calculated.

Edit Fields
The fields for data entry are highlighted and display fields are not highlighted. For example:

Fields that have been changed are highlighted in blue with fields that contain errors highlighted in red. For example:

A copy and paste facility is available to allow users to copy data from a table created either in Excel or Word and insert the copied data directly into any of the fields on the page.

This function is currently only available on the CGS Estimates – Campus EFTSL page.
The cursor must be positioned in the first field on the page where data is to be inserted.

Where the amount of copied data is more than the number of available columns/rows on the page, the excess data will be discarded when the data has been inserted.

It is important to note that where multiple panels are available on the web page, data will have to be inserted separately into each panel.

Messages

Error Messages

When errors are detected in the data provided, an error message is displayed. For example:

![PFS0001 - The EFTSL field has not been completed correctly. The EFTSL must be 0 (zero) or less than 10,000.]

The error message is displayed immediately below the breadcrumbs.

The field that triggered the error is highlighted in red. For example:

![99999999.445767772
166.00000000
0.00000000
3000.741421435
1.50000000
0.00000000]

When an error message is displayed, changes that have been made on the web page will not be saved until the error is resolved.

Warning Messages

Warning messages can also be displayed on the page.

A warning allows the user to decide whether to continue to the changes or stay on the current web page to resolve the situation.
Warning messages are displayed in the form of a pop–up over the page. For example:

![Message from webpage](image)

The text in the pop–up message identifies the potential data problem.

Select one of two actions:

- Click **OK** – the data is saved.
- Click **Cancel** – you will be returned to the unsaved page to resolve the situation.

**Information Messages**

When no error situations or potential problems are detected and the data has been successfully saved, an information message is displayed. For example:

```
PFS0053 : Estimates EFTSL successfully saved and all data recalculated. You may also need to check the HECS-HELP estimates where applicable.
```

The information message is displayed immediately below the breadcrumbs.

**Printing**

Details on any web page can be printed.

To print, use the browser print function as shown above.

*The details that are printed will only include the details from expanded panels.*
Web Page Functions

Edit Fields

To edit any field:

- Click in the required field and adjust the data as required.
- To save the changes, click **Save**.

Edit EFTSL Value

When adjusting any EFTSL Value, the following rules apply:

- The field cannot be left blank.
- Only numeric characters can be entered.
- Only one decimal point is allowed.
- The value entered can be 0 (zero) but must be in the range 0 to **9,999.999999999**.
- When an EFTSL has been entered with greater than 9 decimal places, the value will be truncated (cut off) to 9 decimal places when the data is saved.

Edit Percentage Value

When adjusting any percentage value, the following rules apply:

- The field cannot be left blank.
- Only numeric characters can be entered.
- Only one decimal point is allowed.
- The value entered must be in the range 0 to 100.
- There is no need to key the percentage (%) sign.
- When a percentage has been entered with greater than 4 decimal places, the value will be rounded to the nearest 4 decimal places when the data is saved.

Edit Monetary Value

When adjusting any maximum student contribution amount, the following rules apply:

- The field cannot be left blank.
- Only numeric characters can be entered.
- A decimal point is **NOT** allowed as only whole dollar values must be entered.
There is no need to key the dollar ($) sign.

**Save Changes**

Changes can be made in different panels on the same web page before saving the data.

When an error has been detected on the screen, a message is displayed and none of the changes made will be saved. The error must be corrected *before* the changes can be saved.

When the changes have been saved, the web page is refreshed containing the recalculations based on the data provided on the screen.

All changes must be saved *before* navigating to another year tab or another web page.

> Changes need to be saved at regular intervals. The system will log out when there has not been any activity in a 20 minute period. Any data that have not been saved will be lost.

**Cancel Changes**

Changes that have been made can be cancelled before the data is saved.

To cancel the changes, click *Cancel*

The following pop-up message is displayed:

- Click *OK* – unsaved data are discarded and the page is refreshed with the latest saved details.
- Click *Cancel* – the unsaved page is redisplayed.
CGS Estimates

Overview

The *CGS Estimates* home page is accessed by selecting *CGS Estimates* when the CGS/HECS–HELP menu has been expanded:

![Diagram of menu options]

The following message is displayed when the submission period is not open:

```
PFS6047 - Your estimates cannot be adjusted and signed-off at this time. You will be advised when the estimates window is open for you to adjust your estimates.
```
Table A providers

When the submission period is open, expand CGS Estimates to display the web pages that can be selected from the navigation bar:

<table>
<thead>
<tr>
<th>CGS Estimates Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimates EFTSL</td>
<td>Adjust CGS non-designated and designated place estimates.</td>
</tr>
<tr>
<td>Campus EFTSL</td>
<td>Adjust undergraduate and postgraduate place estimates for each campus.</td>
</tr>
<tr>
<td>Payment Summary</td>
<td>View a summary of the estimated CGS advance payment.</td>
</tr>
</tbody>
</table>

Non-Table A providers

When the submission period is open, expand CGS Estimates to display the web pages that can be selected from the navigation bar:

<table>
<thead>
<tr>
<th>CGS Estimates Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGS Estimated Funding</td>
<td>View CGS designated place estimates and estimated CGS funding (including CGS loadings, where applicable).</td>
</tr>
</tbody>
</table>
Estimates EFTSL (Table A providers Only)

The *Estimates EFTSL* page is accessed by selecting the option from the navigation bar when the CGS Estimates menu has been expanded:

The details shown in the Estimates panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

Adjust non–designated place estimates and designated place estimates for the ‘Current Year’ in the Estimates panel.
Adjustments to the ‘Current Year’ non-designated place estimates and designated place estimates in the Estimates panel have an impact on the ‘Current Year’ HECS–HELP data.

Next Year and Future Years

The details shown in the Estimates panel above apply to:

- ‘Next Year’ and ‘Future Years’ in Estimates Period 1; and
- ‘Next Year’ and ‘Future Years’ in Estimates Period 2.

Only non-designated place estimates for the ‘Next Year’ and ‘Future Years’ can be adjusted in the Estimates panel.

Adjustments to the ‘Next Year’ non-designated place estimates in the Estimates panel have an impact on the ‘Next Year’ HECS–HELP data.

In Estimates Period 2, the department collects non-designated place estimates for an additional year.
Estimates Summary Panel

Current Year

The details shown in the *Estimates Summary* panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

*The Estimates Summary panel displays the calculated values for each funding cluster based on the ‘Current Year’ details provided in the Estimates panel.*
Next Year

The details shown in the Estimates Summary panel above apply to the ‘Next Year’ in Estimates Period 2.

The Estimates Summary panel displays the calculated values for each funding cluster based on the ‘Next Year’ details provided in the Estimates panel.
Future Years

The details shown in the *Estimates Summary* panel above apply to:

- ‘Future Years’ in Estimates Period 1; and
- ‘Future Years’ in Estimates Period 2.

*The Estimates Summary panel the calculated values for each funding cluster based on the ‘Future Years’ details provided in the Estimates panel.*

CGS Estimated EFTSL Funding Panel

Current Year
The details shown in the **CGS Estimated EFTSL Funding** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

The **CGS Estimated EFTSL Funding** panel displays a summary of the estimated CGS payment based on the ‘Current Year’ calculated details shown in the **Estimates Summary** panel.

**Next Year**

The details shown in the **CGS Estimated EFTSL Funding** panel above apply to:

- ‘Next Year’ in Estimates Period 1; and
- ‘Next Year’ in Estimates Period 2.

The **CGS Estimated EFTSL Funding** panel displays a summary of the estimated CGS payment based on the ‘Next Year’ calculated details shown in the **Estimates Summary** panel.

The **CGS Estimated EFTSL Funding** panel does not apply to ‘Future Years’.
Campus EFTSL (Table A providers Only)

The Campus EFTSL page is accessed by selecting the option from the navigation bar when the CGS Estimates menu has been expanded:

Campus undergraduate and/or postgraduate place estimates only apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

Campus EFTSL Panel

Each Campus EFTSL panel displays up to a maximum of 4 campuses. Where more than 4 campuses are available, the remaining campuses are displayed in additional Campus EFTSL panels.

The campuses are displayed in ascending alphabetical campus name order.

Provide undergraduate and/or postgraduate place estimates for each campus against the appropriate funding clusters in Estimates Period 1.

Adjust undergraduate and/or postgraduate place estimates for each campus against the appropriate funding clusters in Estimates Period 2.
The campuses displayed in the Campus EFTSL panel(s) are the campuses listed in each provider’s CGS Funding Agreement as those permitted to enrol Commonwealth Supported students.

All campus undergraduate and postgraduate place estimates are defaulted to ‘0’ at the start of Estimates Period 1.

Campus Summary Panel

The Campus Summary panel displays a summary of the campus data based on the details provided in the Campus EFTSL panel.

The Campus Summary panel provides a comparison of the campus data with the estimates data provided in the Estimates panel on the Estimates EFTSL page.

The total undergraduate EFTSL for all campuses should match the Estimated EFTSL – Total Undergraduate EFTSL.

The total postgraduate EFTSL for all campuses should match the Estimated EFTSL – Total Postgraduate EFTSL.
Payment Summary (Table A providers Only)

The Payment Summary page is accessed by selecting the option from the navigation bar when the CGS Estimates menu has been expanded:

![Payment Summary](image)

Payment Summary Details

**Current Year**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>Current Advance Payment</th>
<th>Adjusted Advance Payment</th>
<th>Variance $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non Designated Course of Study Advance</td>
<td>$121,030.972</td>
<td>$121,030.972</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designated Course of Study Advance</td>
<td>$41,402,606</td>
<td>$41,402,606</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enabling Loading</td>
<td>$1,230,000</td>
<td>$1,230,000</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional Loading</td>
<td>$8,754,497</td>
<td>$8,754,497</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Student Loading</td>
<td>$633,524</td>
<td>$633,524</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CGS Payment Total</td>
<td>$173,641,999</td>
<td>$173,641,999</td>
<td>$0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The details shown in the Payment Summary page above apply to the ‘Current Year’ in Estimates Period 1.

The Payment Summary page provides a summary of the various payments and a comparison of the payments between the current and previous estimates period.

**Next Year**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>Current Advance Payment</th>
<th>Adjusted Advance Payment</th>
<th>Variance $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non Designated Course of Study Advance</td>
<td>N/A</td>
<td>$150,887,556</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designated Course of Study Advance</td>
<td>N/A</td>
<td>$42,230,558</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enabling Loading</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regional Loading</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Student Loading</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CGS Payment Total</td>
<td>N/A</td>
<td>$173,110,216</td>
<td>N/A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The details shown in the Payment Summary page above apply to the ‘Next Year’ in Estimates Period 2.

The Designated Course of Study Advance for the ‘next year’ is derived from the Maximum Basic Grant for Designated Course of Study on the CGS Provider Data – MBGA and Loading page.

Loadings are not payable for the ‘next year’.

Payments do not apply to ‘Future Years’.

CGS Estimated Funding (Non–Table A providers Only)

The CGS Estimated Funding page is accessed by selecting the option from the navigation bar when the CGS Estimates menu has been expanded:

Provider Estimated EFTSL Panel

Current Year
The details shown in the *Provider Estimated EFTSL* panel above apply to the ‘Current Year’ in Estimates Period 1.

**Next Year**

The details shown in the *Provider Estimated EFTSL* panel above apply to the ‘Next Year’ in Estimates Period 2.

The *Provider Estimated EFTSL* panel displays the calculated values for each funding cluster based on the details provided in the *HECS–HELP Estimates – Student Load* page.

**Estimated Funding Summary Panel**

**Current Year**

The details shown in the *Estimated Funding Summary* panel above apply to the ‘Current Year’ in Estimates Period 1.
Next Year

The details shown in the *Estimated Funding Summary* panel above apply to the ‘Next Year’ in Estimates Period 2.

*The Estimated Funding Summary panel displays a summary of the estimated CGS payment.*

*Loadings are not payable for the ‘next year’.*
HECS–HELP Estimates

Overview

The HECS–HELP Estimates home page is accessed by selecting HECS–HELP Estimates when the CGS/HECS–HELP menu has been expanded:

The following message is displayed when the submission period is not open:

When the submission period is open, expand HECS–HELP Estimates to display the web pages that can be selected from the navigation bar:

<table>
<thead>
<tr>
<th>HECS–HELP Estimates Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Load</td>
<td>Adjust HECS–HELP student load estimates.</td>
</tr>
<tr>
<td>Student Status Split</td>
<td>Adjust grandfathering clause percentage splits.</td>
</tr>
</tbody>
</table>
### HECS–HELP Estimates

<table>
<thead>
<tr>
<th>Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Contribution Liabilities</td>
<td>Adjust maximum student contribution amounts.</td>
</tr>
<tr>
<td>Payment Split</td>
<td>Adjust HECS–HELP payment type percentage splits.</td>
</tr>
<tr>
<td>Payment Estimates</td>
<td>View a summary of the estimated HECS–HELP advance payment.</td>
</tr>
</tbody>
</table>

### Student Load

The **Student Load** page is accessed by selecting the option in the navigation bar when the **HECS–HELP Estimates** menu has been expanded:
HECS–HELP EFTSL Panel

**Table A providers**

<table>
<thead>
<tr>
<th>Funding Cluster</th>
<th>CGS Estimated EFTSL</th>
<th>Funding Sub-Cluster</th>
<th>Funding Sub-Cluster %</th>
<th>WEEK EFTSL (GST+)=</th>
<th>HELP EFTSL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Law, Accounting, Arts, Com, Comm</td>
<td>1,000</td>
<td>1,000</td>
<td>1,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Humanities</td>
<td>747</td>
<td>747</td>
<td>747</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Maths, Stats, Behavioral Science, Social Studies, Computing,笛音, Other Health</td>
<td>2,200</td>
<td>2,200</td>
<td>2,200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Education</td>
<td>1,790</td>
<td>1,790</td>
<td>1,790</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Clinical Psychology, Allied Health, Languages, Vis and Perfor</td>
<td>2,054</td>
<td>2,054</td>
<td>2,054</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Nursing</td>
<td>2,005</td>
<td>2,005</td>
<td>2,005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Engineering, Science, Surveying</td>
<td>2,300</td>
<td>2,300</td>
<td>2,300</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Dentistry, Med, Vet Science, Agriculture</td>
<td>666</td>
<td>666</td>
<td>666</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Agriculture</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>14,250</td>
<td>14,250</td>
<td>14,250</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- When a percentage has been entered with greater than 4 decimal places, the value will be rounded to 4 decimal places when the data is saved.
- When an EFTSL has been entered with greater than 3 decimal places, the value will be truncated to 3 decimal places when the data is saved.
- The Funding Sub-Cluster EFTSL is also rounded to 3 decimal places.
- The HECS-HELP EFTSL is the sum of the Funding Sub-Cluster EFTSL and the WEFS.

**Non–Table A providers**

<table>
<thead>
<tr>
<th>Funding Cluster</th>
<th>CGS Allocated EFTSL</th>
<th>Provider Estimated EFTSL</th>
<th>Funding Sub-Cluster</th>
<th>Funding Sub-Cluster %</th>
<th>WEEK EFTSL (GST+)=</th>
<th>HECS-HELP EFTSL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Law, Accounting, Arts, Com, Comm</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Humanities</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Maths, Stats, Behavioral Science, Social Studies, Computing,笛音, Other Health</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Education</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Clinical Psychology, Allied Health, Languages, Vis and Perfor</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Nursing</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Engineering, Science, Surveying</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Dentistry, Med, Vet Science, Agriculture</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>448</td>
<td>448</td>
<td>448</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- When a percentage has been entered with greater than 3 decimal places, the value will be rounded to 3 decimal places when the data is saved.
- When an EFTSL has been entered with greater than 3 decimal places, the value will be truncated to 3 decimal places when the data is saved.
- The Funding Sub-Cluster EFTSL is also rounded to 3 decimal places.
- The HECS-HELP EFTSL is the sum of the Funding Sub-Cluster EFTSL and the WEFS.

The details shown in the **HECS–HELP EFTSL** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

Adjust the following student load estimates in the **HECS–HELP EFTSL** panel:

- Provider estimated EFTSL for each funding cluster (non–Table A providers only);
• Percentage splits for each funding sub–cluster; and
• WEI EFTSL for each funding sub–cluster.

If the CGS Estimated EFTSL (Table A providers only) or CGS Allocated EFTSL (non–Table A providers only) is ‘0’ for a specific funding cluster, the following rules must be followed:

• The provider estimated EFTSL must be ‘0’ (non–Table A providers only).
• The funding sub–cluster percentage split must be 0%.
• The WEI EFTSL must be ‘0’.

If the CGS Estimated EFTSL (Table A providers only) or CGS Allocated EFTSL (non–Table A providers only) is not ‘0’ for a specific funding cluster, the combined funding sub–cluster percentage split must be 100%.

Adjustments made to the student load estimates in the HECS–HELP EFTSL panel have an impact on the data in the remaining HECS–HELP Estimates pages.

Adjustments made to the provider estimated EFTSL have an impact on the HECS–HELP advance payment shown on the CGS Estimated Funding page for non–Table A providers.

The WEI EFTSL is defaulted to ‘0’ for the ‘Next Year’ at the start of Estimates Period 2.
### Student Contribution Liable EFTSL Panel

<table>
<thead>
<tr>
<th>Funding Sub-Cluster</th>
<th>Enabling EFTSL (E490-261)</th>
<th>Other Commonwealth Supported EFTSL (E490-260)</th>
<th>Student Contribution Liable EFTSL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-Law, Accounting, Admin, Econ, Comm</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>1,588,100000000</td>
</tr>
<tr>
<td>2-Humanities</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>747,500000000</td>
</tr>
<tr>
<td>3a-Maths, Stats, Computing, Built Env, Other Health</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>1,647,447875000</td>
</tr>
<tr>
<td>3b-Behavioural Science, Social Studies</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>1,183,154625000</td>
</tr>
<tr>
<td>4-Education</td>
<td>1.00000000</td>
<td>0.00000000</td>
<td>1,767,387500000</td>
</tr>
<tr>
<td>5a-Languages, Vis and Perf Arts</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>1,863,61590000</td>
</tr>
<tr>
<td>5b-Clinical Psychology</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>454,655400000</td>
</tr>
<tr>
<td>6c-Allied Health</td>
<td>0.00000000</td>
<td>0.50000000</td>
<td>435,19010000</td>
</tr>
<tr>
<td>6-Nursing</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>2,065,00000000</td>
</tr>
<tr>
<td>7-Engineering, Science, Surveying</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>2,350,00000000</td>
</tr>
<tr>
<td>8a-Dentistry, Med, Vet Science</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>663,414000000</td>
</tr>
<tr>
<td>8b-Agriculture</td>
<td>0.00000000</td>
<td>0.00000000</td>
<td>324,98500000</td>
</tr>
<tr>
<td>Total</td>
<td>1.00000000</td>
<td>0.50000000</td>
<td>14,230,90000000</td>
</tr>
</tbody>
</table>

- When an EFTSL has been entered with greater than 9 decimal places, the value will be truncated to 9 decimal places when the data is saved.
- The Student Contribution Liable EFTSL is the HECS-HELP EFTSL minus the sum of the Enabling EFTSL and the Other Commonwealth Supported EFTSL.

The details shown in the **Student Contribution Liable EFTSL** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

Adjust the following student load estimates in the **Student Contribution Liable EFTSL** panel:

- Enabling EFTSL for each funding sub–cluster; and
- Other Commonwealth Supported EFTSL for each funding sub–cluster.

If the **CGS Estimated EFTSL** (Table A providers only) or **CGS Allocated EFTSL** (non–Table A providers only) is ‘0’ in the **HECS–HELP EFTSL** panel for a specific funding cluster, the following rules must be followed:

- The Enabling EFTSL must be ‘0’; and
- The Other Commonwealth Supported EFTSL must be ‘0’.
The combined *Enabling EFTSL* and *Other Commonwealth Supported EFTSL* must not be greater than the calculated *HECS–HELP EFTSL* in the *HECS–HELP EFTSL* panel.

| The Enabling EFTSL is defaulted to ‘0’ for the ‘Next Year’ at the start of Estimates Period 2. |
| The Other Commonwealth Supported EFTSL is defaulted to ‘0’ for the ‘Next Year’ at the start of Estimates Period 2. |

**Student Status Split**

The *Student Status Split* page is accessed by selecting the option from the navigation bar when the *HECS–HELP Estimates* menu has been expanded:
Grandfathering Percentage Panel

The details shown in the Grandfathering Percentage panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

Adjust the percentage split for each grandfathering clause.

Student Status Split Panel

The calculated Subject to Maximum Student Contribution EFTSL and grandfathering EFTSL (where applicable) are rounded to 9 decimal places. The total EFTSL shown in the Total line is calculated using the rounded EFTSL.
The details shown in the **Student Status Split** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

*The Student Status Split panel displays the calculated values for each funding sub–cluster based on the details provided in the HECS–HELP EFTSL panel on the Student Load page and in the Grandfathering Percentage panel above.*

**Student Contribution Liabilities**

The **Student Contribution Liabilities** page is accessed by selecting the option from the navigation bar when the HECS–HELP Estimates menu has been expanded:
The details shown in the **Subject to Max Student Contribution** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

Adjust the maximum student contribution amount.

*The adjusted maximum student contribution amount must not be more than the pre-set maximum amount.*
Grandfathering Panel

The details shown in the **Grandfathering** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

The **Grandfathering** panel displays the calculated values for each funding sub-cluster based on the details provided in the **HECS–HELP EFTSL** panel on the Student Load page and in the **Grandfathering Percentage** panel on the **Student Status Split** page.
Payment Split

The *Payment Split* page is accessed by selecting the option from the navigation bar when the *HECS–HELP Estimates* menu has been expanded:

**Payment Split Details**

The details shown in the *Payment Split* page above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ and ‘Next Year’ in Estimates Period 2.

Adjust the percentage splits for any of the following HECS–HELP payment split types in the *Payment Split* page:

- Deferred to HECS–HELP loan;
- Upfront eligible for discount; and
- Upfront not eligible for discount.
The combined payment split percentages (i.e., total student contribution liability) must equal 100%.

Payment Estimates

The Payment Estimates page is accessed by selecting the option from the navigation bar when the HECS–HELP Estimates menu has been expanded:

Payment Options Panel

Current Year

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>Difference $</th>
<th>Variance %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred to HECS-HELP Loan</td>
<td>$78,791,322</td>
<td>$78,791,322</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
<tr>
<td>Upfront Eligible for Discount</td>
<td>$24,227,278</td>
<td>$24,227,278</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
<tr>
<td>Upfront Eligible for Discount</td>
<td>$2,317,392</td>
<td>$2,317,392</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
<tr>
<td>Total Student Contribution Liability</td>
<td>$165,335,892</td>
<td>$165,335,892</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
</tbody>
</table>

- The Deferred to HECS-HELP Loan amount is derived from the calculated total Deferred to HECS-HELP Loan amount shown on the Payment Split page.
- The Upfront Eligible for Discount amount is derived from the calculated total Upfront Eligible for Discount amount shown on the Payment Split page.
- The Upfront not Eligible for Discount amount is derived from the calculated total Upfront not Eligible for Discount amount shown on the Payment Split page.
- All amounts are rounded and displayed in whole dollars only.
The details shown in the **Payment Options** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

*The Payment Options panel provides a summary of the various payment types as well as a comparison of the payment between the current estimates period and the previous estimates period.*

**Next Year**

The details shown in the **Payment Options** panel above apply to the ‘Next Year’ in Estimates Period 2.
Funding Components Panel

Current Year

The details shown in the Funding Components panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

The Funding Components panel provides a summary of the various funding types as well as a comparison of the payment between the current estimates period and the previous estimates period.

Next Year

The details shown in the Funding Components panel above apply to the ‘Next Year’ in Estimates Period 2.
Provider Revenue Panel

**Current Year**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>Difference $</th>
<th>Variance %</th>
</tr>
</thead>
<tbody>
<tr>
<td>HECS-HELP Advance Payment</td>
<td>$81,214,050</td>
<td>$81,214,050</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
<tr>
<td>Upfront Student Payment</td>
<td>$24,121,042</td>
<td>$24,121,042</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
<tr>
<td>Total Provider Revenue</td>
<td>$105,335,092</td>
<td>$105,335,092</td>
<td>$0</td>
<td>0.00 %</td>
</tr>
</tbody>
</table>

- The HECS-HELP Advance Payment is the sum of the Deferred Funding and the Discounted Funding shown in the Funding Components section above.
- The Upfront Student Payment is derived from the Upfront Student Payment shown in the Funding Components section above.
- The Total Provider Revenue is the sum of the HECS-HELP Advance Payment and the Upfront Student Payment.
- All amounts are rounded and displayed in whole dollars only.

The details shown in the **Provider Revenue** panel above apply to:

- ‘Current Year’ in Estimates Period 1; and
- ‘Current Year’ in Estimates Period 2.

*The Provider Revenue panel provides a summary of the various provider revenue types as well as a comparison of the payment between the current estimates period and the previous estimates period.*
The details shown in the **Provider Revenue** panel above apply to the ‘Next Year’ in Estimates Period 2.
Confirm and Sign–off Estimates

Overview

The *Sign–off Estimates* home page is accessed by selecting *Sign–off Estimates* when the CGS/HECS–HELP menu has been expanded:

![Sign-off Estimates menu](image)

The following message is displayed when the submission period is not open:

![Message](image)

When the submission period is open, expand *Sign–off Estimates* to display the web pages that can be selected from the navigation bar:

![Sign-off Estimates open menu](image)

<table>
<thead>
<tr>
<th>Sign–off Estimates Option</th>
<th>Function</th>
</tr>
</thead>
</table>
Confirm Estimates

**Note:** Only users who have been given access as a Program Officer in CGS and HECS–HELP will see the following screens.

**Table A providers only**

The CGS Campus UG EFTSL Flag and CGS Campus PG EFTSL Flag indicates whether the campus undergraduate and postgraduate estimates match the CGS estimates undergraduate and postgraduate EFTSL:

- **Matched** – the campus EFTSL match the CGS estimates EFTSL – confirm the CGS estimates
- **Not Matched** – the campus EFTSL does not match the CGS estimates EFTSL – resolve the situation before confirming the CGS estimates

The HECS–HELP Student Contribution Liable EFTSL Flag indicates whether the Student Contribution Liable EFTSL on the Student Load page has a negative value:

- **Positive** – the student contribution liable EFTSL does not have a negative value – confirm the HECS–HELP estimates
- **Negative** – the student contribution liable EFTSL has a negative value – resolve the situation before confirming the HECS–HELP estimates

Table A providers must confirm the CGS estimates **before** confirming the HECS–HELP estimates.
The **CGS Campus UG EFTSL Flag** and **CGS Campus PG EFTSL Flag** indicates whether the campus undergraduate and postgraduate estimates match the CGS estimates undergraduate and postgraduate EFTSL. The values must match **before** the CGS estimates can be confirmed.

The **HECS–HELP Student Contribution Liable EFTSL Flag** indicates whether the **Student Contribution Liable EFTSL** on the **HECS–HELP Estimates – Student Load** page has a negative value. The value must be positive **before** the HECS–HELP estimates can be confirmed.

To confirm the CGS estimates, click **Confirm**.

> **The CGS Provider Estimates Status is updated to Confirmed when the CGS estimates have been confirmed.**

To confirm the HECS–HELP estimates, click **Confirm**.

> **The HECS–HELP Provider Estimates Status is updated to Confirmed when the HECS–HELP estimates have been confirmed.**

**Non–Table A providers only**

The **HECS–HELP Student Contribution Liable EFTSL Flag** indicates whether the **Student Contribution Liable EFTSL** on the **HECS–HELP Estimates – Student Load** page has a negative value. The value must be positive **before** the HECS–HELP estimates can be confirmed.

To confirm the HECS–HELP estimates, click **Confirm**.
The HECS–HELP Provider Estimates Status is updated to Confirmed when the HECS–HELP estimates have been confirmed.

Sign–off Estimates

**Note:** Only users who have been given Approver access in FEE–HELP will see the following screens.

**Table A providers only**

![Sign-off Estimates - CGS/HECS-HELP Estimates](image)

Have the necessary system access in order to sign–off CGS and HECS–HELP estimates.

The CGS and HECS–HELP estimates must have been confirmed *before* signing off the CGS and HECS–HELP estimates together.

To sign–off the estimates:

- Select (tick) the **Certified by the Vice–Chancellor** and/or **Chief Financial Officer** checkbox; and
- Click **Sign–off Estimates**.

The CGS and HECS–HELP Provider Estimates Status are updated to Signed–off when the estimates have been signed–off.

To adjust the estimates after the estimates have been signed–off, contact **FEP@education.gov.au**.
Non–Table A providers only

Have the necessary system access in order to sign–off HECS–HELP estimates.

The HECS–HELP estimates must have been confirmed before signing off the estimates.

To sign–off the estimates:

• Select (tick) the **Certified by the Vice–Chancellor** and/or **Chief Financial Officer** checkbox; and

• Click **Sign–off Estimates**.

![](image)

The HECS–HELP Provider Estimates Status is updated to Signed–off when the estimates have been signed–off.

To adjust the estimates after the estimates have been signed–off, contact FEP@education.gov.au.

Amending Signed–off Estimates

When the status of the estimates is signed–off the data can no longer be updated by providers but can still be viewed on the screen.

If there is a data error, and the reporting period is still open, it may be possible for the program officers in the department to re–open the submission allowing you to edit and re-submit your changes.

Note that when the due date for submissions has passed data cannot be changed.

To adjust the estimates after the estimates have been signed–off, contact FEP@education.gov.au.
History Reports

Overview

The *History Reports* home page is accessed by selecting *History Reports* when the CGS/HECS–HELP menu has been expanded:

When final submitted data from previous reporting periods are available, expand *CGS/HECS–HELP History Reports* to display the web pages that can be selected from the navigation bar:

<table>
<thead>
<tr>
<th>History Reports Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>CGS/HECS–HELP History Reports</td>
<td>View details of previously submitted CGS &amp; HECS–HELP estimates.</td>
</tr>
</tbody>
</table>
Display History Reports

Table A providers

History reports can be generated for any submission periods.

The *Program Funding Year/Period* drop-down list displays a list of all previous submission periods.

The previous submission periods are displayed in descending order, i.e., the most recent submission period is displayed first.

To display a history report:

- Select a previous submission period, if required; and

- Click on the history report name (this is a hyperlink) to display the selected report in a separate window; OR
• Click the Excel icon displayed next to the history report name to download the selected report directly to Excel.