PFS – OS–HELP User Guide

A guide on how to use the estimates system to record OS–HELP estimates

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Introduction

Purpose

Higher education providers who receive OS–HELP funding are required to use HEIMS Online to submit estimates for advance funding for this program.

This document provides instructions on how to use the estimates system to record OS–HELP estimates.

The Program Funding application web pages allow providers to record and submit OS–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).
OS–HELP Process Flow

**OPEN SUBMISSION PERIOD**
Administrator
- Set up and open new estimate submission period

**RECORD ESTIMATES**
Program Officer
- DRAFT
- Edit and save OS–HELP estimates
- IN PROGRESS
- Are all edits entered?

**CONFIRM DATA ENTRY**
Program Officer
- CONFIRMED
- Are the numbers correct?

**SIGN-OFF SUBMISSION**
Approver
- SIGNED OFF
- Is the data correct?
- Is the data approved by VC/CFO?

**CLOSE SUBMISSION PERIOD**
Administrator
- YES
- Unlock submission
- Finalise data and close submission period

Estimates period status = OPEN
Emails sent to provider contacts

Estimates period status = CLOSED
History reports for period available
OS–HELP Estimates Processing

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

- Number of OS–HELP study in Asia loans
- Number of OS–HELP study in non–Asian countries loans
- Number of OS–HELP language loans

For *Estimates Period 2 (October)*, provide the following OS–HELP estimates for both the *current* year and the *following* year:

- Number of OS–HELP study in Asia loans
- Number of OS–HELP study in non–Asian countries loans
- Number of OS–HELP language loans

**Signing–off Estimates**

When adjustments to the OS–HELP estimates are complete, confirm and sign–off the estimates.

**Before Starting**

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

To apply for access to OS–HELP estimates, select the appropriate role for OS–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 OS–HELP are:

- **Program Officer** – update, save and confirm OS–HELP estimates data
- **Approver** – indicate Vice–Chancellor, Chief Executive Officer and/or Chief Financial Officer approval and sign–off OS–HELP estimates data
- **Review (Read Only)** – view OS–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 OS–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 **OS–HELP** home page is accessed by selecting **OS–HELP** when the **Program Funding** application menu has been expanded. Select **OS–HELP**:

To update **OS–HELP**, select **OS–HELP Estimates**:

Then select **Loan Estimates**:
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 OS–HELP option to return to list all the OS–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></th>
<th>Estimates Period 1</th>
<th>Estimates Period 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Estimates</td>
<td>Current year ONLY</td>
<td>Current year and the following next year, e.g., 2017 to 2018</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>100</th>
<th>120</th>
</tr>
</thead>
<tbody>
<tr>
<td>175</td>
<td>175</td>
</tr>
<tr>
<td>175</td>
<td>175</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>100</th>
<th>140</th>
</tr>
</thead>
<tbody>
<tr>
<td>175</td>
<td>99.99</td>
</tr>
<tr>
<td>175</td>
<td>175</td>
</tr>
</tbody>
</table>

Messages

**Error Messages**

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

*PFS1001 - The number of OS-HELP loans has not been completed correctly. Only whole numeric values are acceptable. Negative values are not permitted.*

The error message is displayed immediately below the breadcrumbs.
The field that triggered the error is highlighted in red. For example:

```
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>140</td>
</tr>
<tr>
<td>175</td>
<td>99.99</td>
</tr>
<tr>
<td>175</td>
<td>175</td>
</tr>
</tbody>
</table>
```

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]

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:

```
[1] PFS1044 - Loan estimates successfully saved and all data recalculted
```

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.

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 OS–HELP Loan Amount

When adjusting an OS–HELP loan amount, the following rules apply:

• The field cannot be left blank.
• Only numeric characters can be entered.
• A decimal point is NOT allowed.
• The value entered must be in the range 0 to 99,999.

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.

Adjusting OS–HELP Estimates

Overview

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

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

> PFS1008 - 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.
When the submission period is open, expand **OS–HELP Estimates** to display the web pages that can be selected from the navigation bar:

<table>
<thead>
<tr>
<th>OS–HELP Estimates Option</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Estimates</td>
<td>Adjust OS–HELP loan estimates.</td>
</tr>
</tbody>
</table>

**Loan Estimates**

The *Loan Estimates* page is accessed by selecting the option in the navigation bar when the **OS–HELP Estimates** menu has been expanded:
Current Year

The details shown on the Loan Estimates page above apply to:

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

Adjust one or more of the following OS–HELP values for the ‘Current Year’ on the Loan Estimates page:

- Number of OS–HELP study in Asia loans;
- Number of OS–HELP study in non–Asian countries loans;
- Number of OS–HELP language loans.

The OS–HELP loans used for the purpose of calculating the OS–HELP liability are:

- OS–HELP study in Asia loans; plus
- OS–HELP study in non–Asian countries loans.

The Loan Estimates page provides a comparison between the adjusted data and the current data.
Next Year

The details shown on the Loan Estimates page above apply only to ‘Next Year’ in Estimates Period 2.

Adjust one or more of the following initial OS–HELP values for the ‘Next Year’ on the Loan Estimates page:

- OS–HELP study in Asia;
- OS–HELP study in non–Asian countries; and
- OS–HELP language study.

The OS–HELP loans used for the purpose of calculating the OS–HELP liability are:

- OS–HELP study in Asia loans; plus
- OS–HELP study in non–Asian countries loans.

In Estimates Period 2, the department collects estimates for an additional year.

To save the changes, click Save.
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.

Confirm and sign–off Estimates

Overview
To confirm and sign–off estimates, go back to the OS–HELP Menu by selecting Program Funding.

Select OS–HELP.

The Sign–off Estimates home page is accessed by selecting Sign–off Estimates when the OS–HELP menu has been expanded:

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

PFS 1003 - 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.
When the submission period is open, expand **Sign-off Estimates** to display the web pages that can be selected from the navigation bar:

Select **OS–HELP Estimates**

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

**Confirm Estimates Details**

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

**Estimates Period 1**
Estimates Period 2

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

The **Total OS–HELP Loans** and **Initial Total OS–HELP Loans** used for the purpose of calculating the OS–HELP liability are:

- OS–HELP study in Asia loans; **plus**
- OS–HELP study in non–Asian countries loans.

The **Total OS–HELP Loans Difference** is the difference between the adjusted total OS–HELP loans and the current total OS–HELP loans.

The **OS–HELP Liability $ Difference** and the **OS–HELP Liability % Variance** is the difference between the adjusted OS–HELP liability and the current OS–HELP liability.

The **Provider Estimates Status** is updated to **Confirmed** when the estimates have been confirmed.
Sign–off Estimates

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

To sign–off the OS–HELP estimates:

- Key the reason for the variation in the **Reason for Variation** field, if required;
- Select (tick) the **Certified by the Vice– Chancellor, Chief Executive Officer and/or Chief Financial Officer** checkbox; and
- Click **Sign–off Estimates**.

The reason for the variation must be supplied when both the **Total OS–HELP Liability $ Difference** and **Total OS–HELP Liability % Variance** for the ‘Current Year’ have exceeded the specified variation thresholds. Note: The specified variation thresholds are outlined in the footnote on the OS–HELP Estimates page (see screenshot above).

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

**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.
History Reports

Overview

The History Reports home page is accessed by selecting History Reports when the OS-HELP menu has been expanded:

When final submitted data from previous reporting periods are available, expand OS-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>OS-HELP History Reports</td>
<td>View details of previously submitted OS-HELP estimates.</td>
</tr>
</tbody>
</table>
Display History Reports

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

To display an OS–HELP 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.