

[REDACTED]
[REDACTED]
[REDACTED]

Needs Assessment Centres claiming travel/time for Home (Residential) Assessments

A home assessment should only be carried out under exceptional circumstances – for instance where a student has a severe disability affecting mobility issues. This should be notified to us by the assessor in advance; in any event the NAR should state on the front page that the venue type is ‘Residential’ (see the section above for more information on Assessment Centre Venues).

Some Needs Assessors/Assessment Centres have tried to invoice for the cost of the Needs Assessment, as well as other expenses such as time, travel and toll costs. E.g., The cost of normal assessment, plus £XX per hour + vat for travel time, plus mileage at £0.XX per mile, plus toll costs. This can come to upwards of £200 additional costs on the NAR.

With NMH we expect any travel/administration costs to be built into the hourly rates for that support but are not able to apply this to residential NARs.

If a Needs Assessment Centre queries if they can charge travel costs/toll costs/travel time, then we can advise them that we can support the invoicing of mileage, but only at our rate (28p per mile for 2013/14 academic year, 29p per mile for 2014/15 academic year). This is the same mileage rate that we would pay were a student to claim mileage costs to/from the Needs Assessment Centre and we feel that there is no justification to go above these costs.

These instances should be few and far between, but if you have any queries then please refer to your Team Leader, [REDACTED] or the Q&D team in the first instance.

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Students' travel costs with regard to field trips will be paid from Travel Allowance, whereas any travel costs associated with a Non Medical Helper (NMH) as a result of this field trip will be paid out of NMH Allowance.

Travel to and from the Needs Assessment will be paid from General Allowance.

This will apply to new and continuing students from academic year 2013/14 – other than in those cases where study needs assessment recommendations to the contrary have already been agreed in a DSA2 letter.

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DSA Policy Update – Increases to Maximum Allowances – 2014/15

The maximum allowances available have remained unchanged for a number of years, but in 2014/15 an increase has been made to all allowances (NMH, Equipment and General – Travel remains uncapped). Please see below for a table detailing the new allowances – these apply to all students (new or continuing) in 2014/15 and beyond. Any previous years allowances remain unchanged.

Full Time	Specialist Equipment	£5,212	(+£51)	Course Duration	
	Non Medical Helper	£20,725	(+£205)	Per Year	
	General Allowance	£1,741	(+£17)	Per Year	
Part Time	Specialist Equipment	£5,212	(+£51)	Course Duration	
	Non Medical Helper 75%	£15,543	(+£153)	Per Year	
	Non Medical Helper 60%	£12,435	(+£123)	Per Year	
	Non Medical Helper 50%	£10,362	(+£102)	Per Year	
	Non Medical Helper 25%	£5,181	(+£51)	Per Year	
	General Allowance 75%	£1,305	(+£12)	Per Year	
	General Allowance 60%	£1,044	(+£10)	Per Year	
	General Allowance 50%	£870	(+£8)	Per Year	
	General Allowance 25%	£435	(+£4)	Per Year	
Post Grad		£10,362	(+£102)	Per Year	

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

We will be issuing communication to Assessment Centres to advise of this process update.

Email Template

Dear (Needs Assessor's Name)

I am currently processing the NAR for the above named student and unfortunately the NMH titles for xxxxx do not fit with the new NMH role descriptors which have been in place since 31st March 2014.

Can you please confirm which of the new role descriptors this is meant to be?

If you are unaware of the new NMH role descriptors please refer to the NMH Services Reference Manual which is available on the Practitioners Website.

<http://www.practitioners.slc.co.uk/products/disabled-students'-allowances/dsas-forms-and-guides.aspx>

To prevent future queries please could these new role descriptors be used in all Needs Assessments and additional recommendations.

Please reply to [insert your email address] to confirm this information. If you wish to discuss this matter further, please email me or phone on [insert telephone number]. Please do not pass my phone number onto students.

To ensure a good customer service and not to cause unnecessary delays for the student, I will release the agreement after 10 working days from today [insert date of the pend]. If the requested information will not be available within this time, any outstanding allowances will be confirmed to the student in an updated letter, once the necessary information is received.

Kind Regards

Your Name
DSA Officer

To ensure consistency across our systems, when NMH agreements are added to the Student Database, only the agreed NMH Descriptors should be used. The Student Database template was updated recently so that only these terms appear in the drop down options - for any documents created before this change the information will need to be updated manually.

If you have any questions please refer to your Team Manager in the first instance.

BSL Interpreter at the Needs Assessment

It has been confirmed that if a student requires an interpreter at the Needs Assessment, **this is not something that is fundable through the DSA**. We took advice from BIS policy on this matter a number of years ago (this was confirmed in the March 2011 bulletin). As far as we are aware, Assessment centres should be able to support the access needs of students with all disabilities. If an interpreter is required for the student to access the Assessment, then we would expect the Assessment centre to provide this and we wouldn't expect a deaf student to be charged an additional cost on top of the standard NAR fee.

[Redacted Signature Block]

NLP – Non Loan Products Screen

Assign the account to yourself and enter the Non Loan Products (NLP) Screen.

Set the figures in the NLP Screen as follows (this will vary depending on the academic year the student started).

NLP Screen – NEW Students 2010/11 and before

These student's should have their NLP set as per the actual agreement on the NAR/DSA2 – this includes their Non Medical Help.

NLP Screen – NEW Students 2012/13 and before

When entering the agreed cost of the support on the NLP Screen for new students who started in 2011/12 or 2012/13, ensure that the figures on the NLP screen that are entered match the types of support and amounts agreed in the DSA2 letter - **apart from the Non Medical Help**. This figure should be set at £3000 less than the maximum allowed for that particular student.

So, the allowances the above students should be set as following:

	NMH	GENERAL	Equipment	Travel
FT Undergrad	£17,520	As per DSA2	As per DSA2	As per DSA2
Post Grad	£7,260	N/A	N/A	N/A
Part Time (any % intensity)	£12,390	As per DSA2	As per DSA2	As per DSA2

This enables us to keep a closer eye on when a student only has £3000 remaining in their allowances so that we can send a reminder to the Disability Officer (DO) at the HEI to advise. If the student reaches this amount the NLP can be increased to the maximum amount available if they have the agreed hours of support available. This will act as a trigger to let the DO and suppliers know they are close to that maximum amount.

General, Equipment and Travel will remain the same and these amounts will be entered as per the actual agreement on the NAR/DSA2.

NLP Screen – NEW Students 2013/14

	NMH (All Years)	GENERAL (Year 1)	GENERAL (Year 2 onwards)	EQUIPMENT	TRAVEL
FT Undergrad	£17,520	As per DSA2 (General + NAR Fee)	As per DSA2	As per DSA2	As per DSA2
Post Grad	£7,260	N/A	N/A	N/A	N/A
Part Time 75%	£15,390	As per Calculation Tool (blue cells)	£1305	As per DSA2	As per DSA2
Part Time 60%	£12,312	As per Calculation Tool (blue cells)	£1044	As per DSA2	As per DSA2
Part Time 50%	£10,260	As per Calculation Tool (blue cells)	£870	As per DSA2	As per DSA2
Part Time 25%	£5,130	As per Calculation Tool (blue cells)	£435	As per DSA2	As per DSA2

NLP Screen – NEW Students 2014/15

	NMH (All Years)	GENERAL (Year 1)	GENERAL (Year 2 onwards)	EQUIPMENT	TRAVEL
FT Undergrad	£17,725	As per DSA2 (General + NAR Fee)	As per DSA2	As per DSA2	As per DSA2
Post Grad	£7,362	N/A	N/A	N/A	N/A
Part Time 75%	£15,543	As per Calculation Tool (blue cells)	£1305	As per DSA2	As per DSA2
Part Time 60%	£12,435	As per Calculation Tool (blue cells)	£1044	As per DSA2	As per DSA2
Part Time 50%	£10,362	As per Calculation Tool (blue cells)	£870	As per DSA2	As per DSA2
Part Time 25%	£5,181	As per Calculation Tool (blue cells)	£435	As per DSA2	As per DSA2

NLP Screen – Continuing Students

The Invoice Team/Claims Team will need to update the NLP Screen (if this was not already updated), so they can make the first payment of that new academic year. When they do this they should first determine if the student is new for 14/15, 13/14 or 12/13 (depending on the year they started will determine which of the table of figures above should be used).

Equipment - Not required so will not need to be updated (equipment is usually paid from year 1)

NMH - would be entered as per the figures from the relevant table above

General - would be entered as per the figures from the relevant table above

Travel - would be entered as per the figures from the relevant table above

NLP – No Non Medical Help (NMH) Agreed

If no NMH has been recommended / agreed, then the NLP screen for NMH would be completed in one of two ways;

For new students prior to 2013/14 – the NLP screen can still be set at £3,000 below the maximum, or can be set with just the cost of the NAR.

For new students from 2013/14 or later – the NLP screen for NMH should be set at zero (since the NAR is paid from the general allowance for these students).

NLP – Postgraduate and Part-Time Students (no application created)

There will be cases where you are not able to set the NLP for a student because the application for that specific year has not been created yet. In these cases please enter the agreed amounts into your Portal note.

NLP – Future Academic Years

Ensure that if the agreement is for one Academic Year (e.g., 2011/12) and there is also an application on the system for a future academic year (in this example, 2012/13) that you set both the 2011/12 and 2012/13 NLP screens as per the instructions above.

***** PLEASE REMEMBER TO CHECK THE SYSTEM CORRESPONDENCE SCREEN AND CANCEL ANY SYSTEM GENERATED DSA1 LETTERS THAT MAY BE GENERATRED WHEN SETTING THE NLP FOR THE SECOND YEAR. *****

[illegible]

Quote Selection (DSA Officers)

Please find attached a copy of the updated [Quote Selection Process](#) which gives advice on how to select quotes for Equipment and NMH following the latest decision to separate these items and to use Net Costs.

This process should be used when reviewing Needs Assessments that were **carried out on or after 1st March 2013**. The following information can also be found in the Forms and Guides folder.

Separate Equipment and AT Training

This update confirms that Equipment and AT Training quotes will be considered as a separate item from the 1st March 2013. DSA Officers would compare the three equipment quotes, choosing the most cost effective and then compare the AT Training quotes and choose the most cost effective. There will be no longer be a marginal allowance for both equipment and training to be delivered from the same supplier.

NOTE - When choosing this please refer to the [DSA Contacts - HEI Assessment Centre spreadsheet](#) to ensure the supplier will train on other suppliers equipment. [REDACTED]

Should a student wish to change the supplier they would need to inform us as per their DSA2 Letter.

Please note that currently AT Training is included in NMH and one quote would be accepted for any HEI on this list (**until April 1st 2013** when **2 quotes** would be required in all instances for AT Training).

QAG Suppliers and Assessment Centres have been notified of this which should ensure their quotes for training are priced as if not winning the equipment order.

of the features) and may be complicated for a student to set up. It is therefore felt that if a Needs Assessor recommends that a student is provided with updated versions of Assistive Software to ensure compatibility with a new DSA funded machine we should look to support this request. Not providing new software would mean that the student does not have access to the software to support the recommended strategies.

Reimbursement Policy Change

As of 24th January 2013 DSAs are not available to cover the costs of any equipment already bought by the student. Therefore, with immediate effect, students should not be encouraged to buy equipment ahead of their study needs assessment and subsequent SLC approval, as they will not receive any reimbursement for it.

This reflects the stated intent of DSAs that they should be available to cover the additional cost of attending HE resulting from a student's disability. BIS take the view that equipment already in the student's possession cannot be considered to be additional. It is acknowledged that sometimes students purchase equipment without realising they are entitled to support, or that some students may wish to purchase equipment in advance of their course. However this is considered to be the only fair way to apply the policy.

This process should include all items and support, apart from Interim NMH (as the guidance specifically states this can be put in place and reclaimed). This means student claims for any of the following; Equipment, Travel (apart from to the Needs Assessment), Internet, Books, Batteries, Consumables, Photocopying/Printing costs and other miscellaneous items that may be recommended.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

What this means for you – DSA Officers...

The way in which you agree to the above items in your DSA2 letters would not change. A line has been added to all versions of the DSA2 letter in the General Allowance Next Steps to advise 'Only items purchased after the date of agreement can be considered for reimbursement'. This line covers the above decisions so students are aware.

The only support which is not affected by this reimbursement process is Interim NMH claims as the guidance specifically states NMH can be put in place and reclaimed through the DSAs.

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[Redacted]

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[illegible]

The NAR in Detail – Non-Medical Help

The purpose of NMH support is to assist the student in becoming an independent learner. The student can exercise their right to choose whomever they like to supply their NMH support. We need to be supportive of the student's choice; however we have to balance this with effective management of public funds.

We always look to pay for NMH support from the student's choice - if the cost difference is marginal. What would be classed as marginal would depend on the type of NMH support being received. If unsure what is classed as marginal then please refer to your TL for advice.

For NARs undertaken on 31st March 2014 later, and for new recommendations from this date, the NMH recommended must meet certain descriptors. Please refer [here](#) for more information.

Non Medical Helper Recommendations

There have been some occasions recently where Needs Assessors / Disability Advisers are recommending unusual NMH support which in some cases may not be deemed study/disability related and should not be funded.

Please take care when reviewing NMH recommendations. It is important to read what the support entails as it may be that some aspects of the support are therapy/medical support and shouldn't be funded. Try to take into account if this is required as a direct result of the students disability, is it needed to complete the course, would all students need this regardless of disability.

Some examples which have been given are:

Non English Speaking Support / Language Support - English was the students 2nd language. As this is not a direct result of a disability it was agreed it should not be funded.

Shorthand Tutoring - A requirement of the course was for students to produce work in shorthand, as this is something all students on this course would require it was deemed not suitable to be provided by DSA.

Presentation Skills - All students on the course were required to do presentations. It was deemed not disability related in this case.

Please note, we are not saying these types of support would never be funded and you should consider the full scenario before making your decision. If you are unsure call the Needs Assessor and discuss this with them to try and get a better understanding, refer the case to your TL or ask for it to be raised in the referral panel.

NMH Checklist

Ensure that there are 2 quotes for each type of non-medical help. Some HEI's have contracts set up with providers, in these cases one quote is acceptable – note though, that **this does not extend AT training**. It should state this in the report or it can be checked on our internal record (part of the [DSA Contacts – HEI Assessment Centres sheet](#)).
If the HEI does not appear with a 'YES' in the one-quote column on this list, query this with the assessor.

Travel Costs for Non-Medical Helpers – we will not agree to fund travel costs for Non-Medical Helpers as this should be built into their business costs. However, there may be exceptions to this, for example when it is a specialised type of support. Please refer to your TL for advice.

Ensure that the name of the non-medical help is entered into the DSA2 letter exactly how it appears on the NAR. Please ensure that any costs are entered including VAT, where applicable and that this is clear in the table.

Wording of Non-Medical Help agreement – In Total / Per Year

The wording of the amount of Non-Medical Help in the DSA2 should be as clear as possible.
30 x 1 hour should be agreed as 30 hours in total – we should not assume that it is to be per academic year unless this is clearly stated in the NAR.
However, if the support is recommended as 1 hour per week for 30 weeks per year we should agree this as 30 hours per academic year. This gives the student the flexibility to use the support as and when and should eliminate emails/calls requesting flexibility.

If the support is recommended at 1 hour per week we should use the additional information within the NAR to determine how many weeks per academic year, either by the total cost of support or the number of weeks in an academic year and then agree the support as above.

We should not be agreeing support at 1 hour per week as in theory this would allow the student to have 52 hours of support per academic year.
The details given for the amount of NMH should be as concise as possible to reduce confusion and help colleagues who pay invoices.

The below examples cover many of the different layouts you may come across and should provide a useful guide when processing NARs:

In Total	Per Year
30 x 1 hour support sessions	1 hour per week for 30 weeks per year (per year)
1 hour per week of 1:1 support for one academic year	30 hours per year
30 hours for the duration of the course	1 hour per week for the duration of the course

30 hours of 1:1 support to be taken across the Academic year	30 hours/year
30 hours in the academic year used flexibly throughout the year	1 hour per week of one to one support
1 hour per week of 1:1 support for 30 weeks	8 hours of note taking support per week
10 hours of Specialist one to one support	8 hours of note taking support per week for 30 weeks per year
8 hours per week of note taking support to be taken flexibly across one academic year	2 hours per week of one to one support
Study Support – 20 hours at £55 per hour	
One hour for each week of the thirty week academic year	

Please note that these are just examples of some of the scenarios you may come across and this is not an exhaustive list. All scenarios cannot be covered in one document and you will need to use your own judgement when making the decision, please call the assessor if you are unsure as this is a quick and easy method for getting the correct answer.

There are instances where a NAR lists both ways. In these situations you should call the assessment centre to check exactly what they are recommending.

When the NAR isn't clear, go with what is definite. Assessors rarely contradict their own recommendations. If the NAR looks like it may be contradictory, go with the definitive:

Section C states '30 hours of 1:1 support' but Section D states '30 hours per year'

Above would be 'per year' as Section D definitively states this, whereas Section C (if taken alone) only suggests it would be 'in total' and doesn't state this directly.

Section C states '1 hour of support per week for 30 weeks per year' and Section D states '30 hours of one to one support'

The above would be 'per year' as Section C has clearly stated this. Section D (if taken alone) might look like it would be 'in total' but the fact that Section C has definitively stated otherwise overrides this.

If a section (C or D) in the report specifically states 'Per Year' or 'In Total' then this overrides other, vaguer statements (e.g. 30 hours or support etc.)

There may be some assessments (e.g. [REDACTED]) where it might not clearly state if the NMH support is per year or in total in the recommendations or sometimes even in the table but a lot of the time there's a paragraph within or around the table in Section D that states **'All costs are Per Academic Year unless stated'**

Some assessors include in the table in Section D a paragraph relating to Pro Rata-ing the support. This does not automatically mean that this support will be per year. Make sure to check both Sections C & D.

Blended NMH Support - AT Training and Study Skills

It has been brought to light that blended support of AT Training and Study Skills has been recommended by [REDACTED]. This has been referred to Management and to BIS for their view and it has been decided we would not support this request and the following text was issued to the Assessment Centre Manager regarding this support:

We understand the role of an AT trainer and a Study Skills tutor to be completely separate and a clear distinction has always been made between the two. AT training is ordinarily time bound to a number of sessions and linked to providing a programme of training for the specialist software and hardware, whereas study skills support tends to be a longer term arrangement.

We expect a recommendation for AT training to be indicated separately in the Needs Assessment report and supported by 2 quotes (this does not preclude a study skills provider being one of the named suppliers, if they have the appropriate skill to deliver the training). This has been recently reinforced through correspondence which hopefully has made it's way to your HEI by now. The correspondence confirms that we are reviewing the current exemptions in place from our NMH policy and sets out that exemption from the 2 quote system will no longer extend to Assistive Technology training. In all circumstances, we will require 2 competitive quotes.

Apologies, but our requirement is that if study skills and AT training is being recommended, then we would expect to see a separate recommendation for each and this to be invoiced in a way which allows us to track the delivery of support in line with the recommended hours (as is the accepted practise).

I am not personally aware of any other Assessment centres recommending 'blended support' and it is not something that has ever been discussed at any meetings I have been involved in with Stakeholders. I will be raising this for discussion in meetings planned in for March.

Another Assessment Centre where this has been recommended is [REDACTED]
Following this, please refer any recommendation for such 'blended' support back to the Assessment Centre to request individual quotes.

Also following this some of the recommendations were for "32 hours per year plus 8 per year for the holidays if required" It has been agreed in these instances we are fine to accept 40 hours per year without needing to question this. This would also apply to other types of NMH.

Not all details of the Non-Medical Help are given in the NAR

There will be occasions where the assessor is unable to confirm in the NAR either the amount of support needed (e.g. note-taker), supplier or the hourly rate. In these cases the NAR can be processed as normal but with the standard paragraphs which can be found in the [DSA Appendix](#).

Student Employs Own Support Workers - payment of statutory costs

Where a student employs their own NMH support worker, the DSA Guidance states that the student should seek advice and needs to consider statutory costs such as Holiday Pay, National Insurance Contributions, etc. We would expect therefore that the rate the student pays to their employed support worker would incorporate things such as this in the hourly rate, however, because of various government legislation's, it may be difficult for a student to calculate holiday pay etc into an hourly rate, as holiday entitlement can be based on the number of hours work provided and other varying factors). We have therefore had a couple of cases where a student has claimed the cost of their support workers Holiday Pay.

Although we would expect the hourly rate to encompass such costs, Policy have confirmed that where a student claims the costs for Holiday Pay and NI contributions separately, this can be reviewed and paid if appropriate.

We would treat this similar to, say, a company like [REDACTED], who may charge SFE £50 per hour, but out of this £50 it may be broken down to, for example, £20 wages for the worker, £5 NI, £5 Holiday Pay, £5 Insurance and £15 profit for [REDACTED].

As a student employing their own support worker is, effectively, acting as [REDACTED], then she is able to claim these costs from us. For students employing their own NMH workers, while we may pay holiday and NI contributions, we would not necessarily be expected to pay profit as the student is not an employer in order to make profit, but is an employer because they chose to employ their own support worker. We would also not expect them to just add a 'mark-up' on their cost, holiday pay etc, needs to be calculated and funded accordingly.

Such claims will only occur in isolated and rare cases, and there is no firm guidance on this matter either way - DSA Guidance says SFE and BIS do not advise students follow the route of employing their own support

workers (due to the complexities involved) but it is their choice if they choose to do so. ***In cases where a student employs their own worker, it should be explained at the outset that we should have one overall cost (like [redacted]) to include aspects of all costs.***

In the event you do have such a case please consider the above and refer to a Team Leader if necessary.

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- [redacted]
[redacted]
[redacted]

NMH Descriptors - Note Taking in Absence

Since the implementation of the NMH Role Descriptors we have asked that only those specific terms are to be used in the DSA2 agreement letters. This has started to cause an issue in instances where students are recommended and agreed note taking in absence.

Where this type of NMH is recommended in the NAR please ensure that this is made clear on the DSA2 letter so the invoice staff are aware of what has been agreed.

For example:

"Manual Note Taker (in absence)"

Going forward this should reduce the amount on invoices being passed to the Invoice Champions or investigated as Missed Sessions.

Additional NMH Agreements/Requests

A Guidance Document ([NMH Support Additional Hours Requests - Guidance Document](#)) was created to accompany the [NMH Support Additional Hours Request Form](#). This provides advice to partners on things such as who can make additional requests, how can the requests be made, where should the request be sent and gives DSA Officers guidance on what reasons for request could be accepted.

When agreeing to additional hours of NMH support you must ensure you update the Invoice Pilot Spreadsheet and update the notes on the account. When updating the note on the account please use the below note as an example as there are occasion where Invoices are not paid as the Invoice Team have not been aware of increased hours

Example:
30 hours Study Skills agreed for 11/12 and DO has emailed justification for an additional 5 hours which we have agreed. The portal shows we have paid for 25 hours of this support so far this year therefore the following should be included in addition to your usual note:

Study Skills 2011/12
30 hours previously agreed
35 hours now agreed
25 hours already used
10 hours remaining

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

How this should be listed in DSA2 letter

Non-Medical Helper's Allowance	Assistive Technology training from [REDACTED] for 5 half days at £160.00 for the first half day, £135 for the second half day and £100 per half day for the third, fourth and fifth half day
--------------------------------	--

How this should be given on Invoice Database

NON MEDICAL HELPER INVOICES						
AT TRAINING						
SUPPLIER : [REDACTED]						
INITIAL SUPPORT AGREED	3	Half Day	IN TOTAL			
INITIAL + ADDITIONAL SUPPORT AGREED	3	Half Day	IN TOTAL			
RATE AGREED :	£160.00	PER	Half Day			
INVOICE SUPPLIER	£160.00 for the first half day £135 for the second half day £100 per half day for the third, fourth and fifth half day	SESSIONS REMAIN	PAID DATE	AMOUNT	QUALITY CHECKED	

NMH +VAT Costs wording

It has been identified that further clarification is required regarding VAT costs therefore we have updated the existing 'DSA Guidance - VAT costs' document and a copy is saved in the G Drive in the following location;

[G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance\DSA FORMS AND GUIDES](#)

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Super Reading Course

This is a specific course that is provided, mainly, by [REDACTED] (though other formats have been seen). The super reading course is sometimes recommended within a NAR, generally only for dyslexic students – though please note that other disabilities may have this recommended. Following managements review it was decided that DSA can be used to fund this support, from the Non-Medical Helpers Allowance, so long as it is justified in the NAR. The costs of this would be paid from the NMH allowance and would be paid from the academic year in which the support was taken.

UPDATE 29/04/2014

The Super Reading course does not fall under any of the agreed activity descriptors which have recently been published in the NMH Manual (effective for NARs undertaken on 31/03/14 or later, and for new recommendations from this date). As such we cannot currently agree to any new recommendations for this support to be funded via the DSA. If you receive a recommendation for this support please advise that it is currently under review and that we cannot agree to fund it at this time. A further update will follow once this possible exception has been reviewed by DSA Management.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED].

Moodswings

Upon review it has now been confirmed that MoodSwings support **can** be funded via DSA. The support that is offered does fall in line with the Specialist Mentor NMH descriptor and as long as the correct term is used within the recommendation MoodSwings can be confirmed as a supplier of this support.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

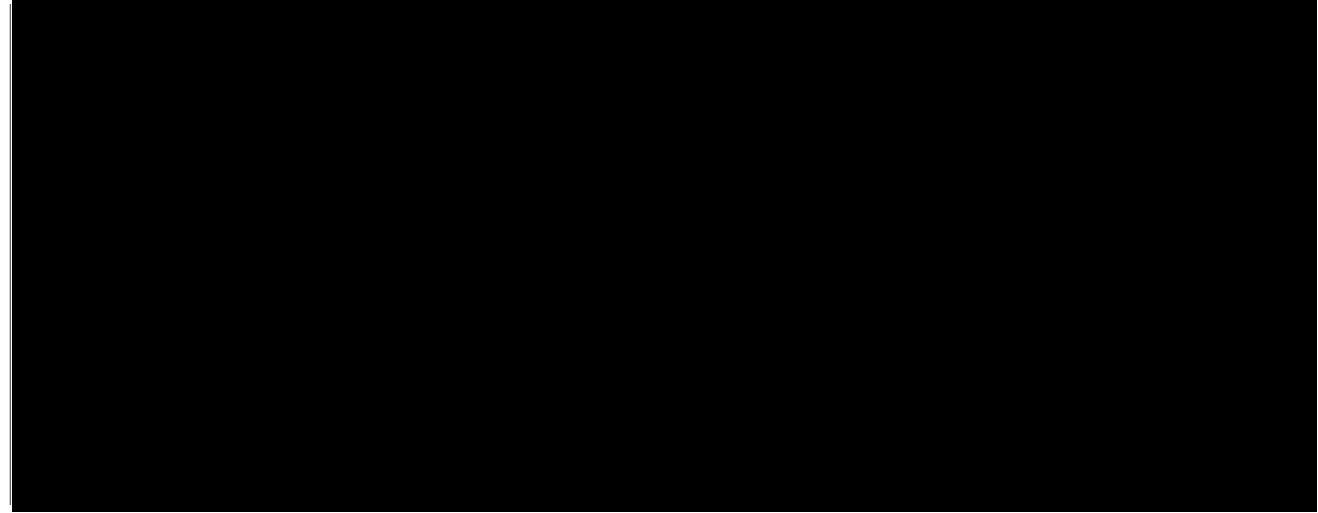
[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



Requests to update NMH supplier - agreed supplier not able to provide

There will be cases where we are contacted by agreed suppliers to state that they are not able to provide the support agreed for the student and that the supplier needs to be changed to 'X', this is usually because they do not have enough staff available to provide the support. As we know we have some HEIs that are on our one quote exemption list and some for whom two quotes are needed. However, it has come to light that different Officers are dealing with this situation in different ways, so to ensure consistency the following examples are given about how to deal with these requests to change supplier.

You need to ensure that when you are changing the supplier that you update all the required information - update the DSA2, Student Database etc.

The full process is found in the following location:

[G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance\DSA FORMS AND GUIDES\DSA Process - Changing Supplier v4.0](#)

Please note that this information relates only to a supplier wanting to change the provider of NMH because they do not have the capacity to do so, how we deal with other requests to change supplier remains unchanged.

Contact/ 1 Quote Spreadsheet

[G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance](#)

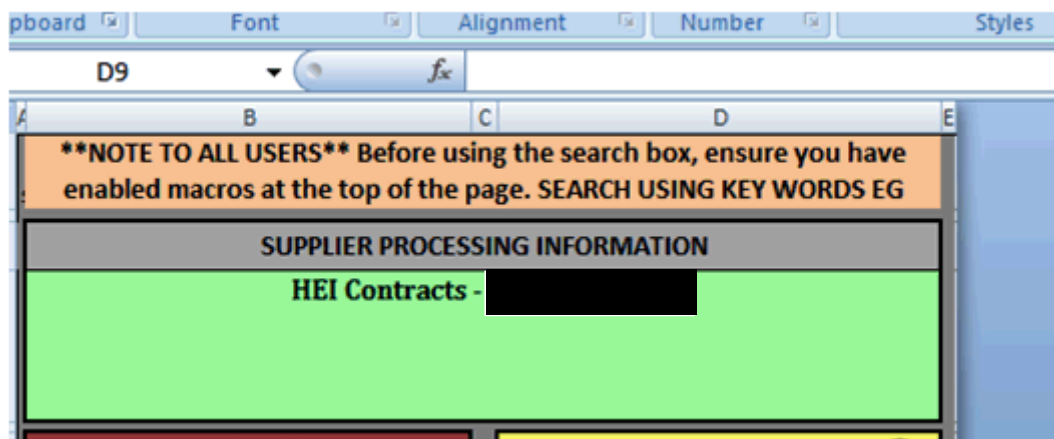
Invoice Supplier Database – be sure to use the most recent version

[G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance\Invoice Teams\Supplier Database](#)

(Please note that the HEI can be located on the Invoice Supplier Database in the same way as the Contact sheet – enter the name of the chosen HEI within the search box and select the appropriate option).

Example 1

University of [REDACTED] is agreed as the supplier of study skills. They then contact us to confirm they are unable to provide the support and have outsourced this to [REDACTED] at the same cost. We would check the 1 quote spreadsheet. If they were not exempt, we would require another quote to go ahead and compare with [REDACTED]. However, in this instance 1 quote is OK. Check the Invoice Supplier Database to determine whether or not this 1 quote contract is with [REDACTED].



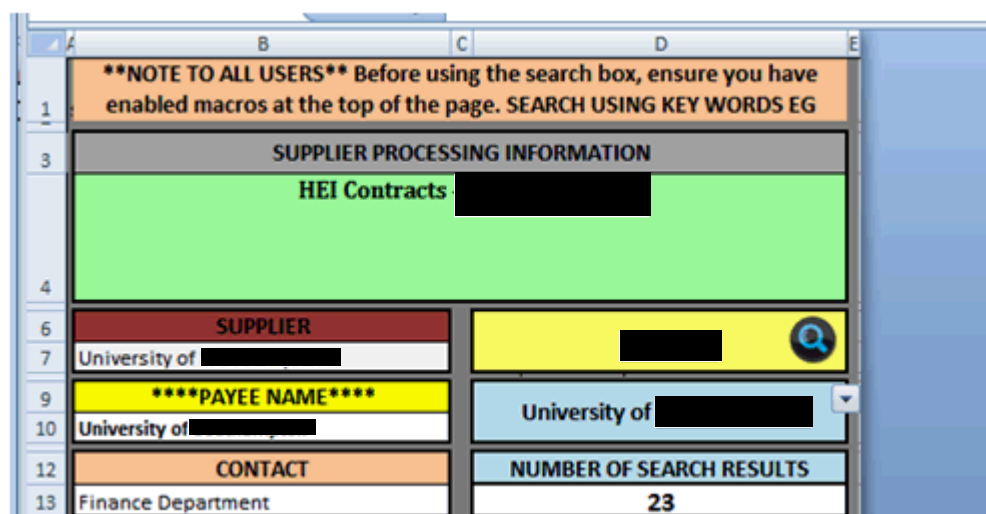
Since the contract is with [REDACTED], we would be OK to go ahead and update this student's agreement letter to show the suppliers name and their hourly rate. If the contract was not with [REDACTED], you will need to refer this case to the invoice champions inbox (DSA Invoice Champs/SLC)

Example 2

[REDACTED] College and [REDACTED] are recommended within the NAR - [REDACTED] College is the chosen supplier. [REDACTED] then contacts us to confirm they are unable to provide the support. We would check the 1 quote spreadsheet. Since [REDACTED] College is not 1 quote exempt, another quote would be required. This would then be reviewed along with the quote in the NAR from [REDACTED].

Example 3

University of [REDACTED] is the agreed supplier and are on the 1 quote spreadsheet. They are unable to provide the support. A request is received recommending the NMH is provided by [REDACTED] Learning at an increased cost of £12 per hour. We would need to check the 1 quote spreadsheet. In this instance University of [REDACTED] are 1 quote exempt. We then check the Invoice Supplier Database to check who the contract is with.



In this instance, **regardless of the price increase**, we would agree the support with [REDACTED] Learning and update the DSA2 to show the supplier name and their hourly rate. If the contract was not listed with [REDACTED], you would need to refer this to the invoice champions inbox (DSA Invoice Champs/SLC)

To confirm, this is now a 3 Step Process:

- 1. Check the 1 Quote Spreadsheet**
- 2. Check the Invoice Supplier Database**
- 3. Either update the DSA2 letter, or refer to the invoice champs.**

If you have any questions please refer to your TL in the first instance.


Provision of Support via 3rd Party Suppliers

It's been identified that some HEIs/suppliers have been emailing us with numerous queries in connection with the provision of support via 3rd party suppliers.


When a HEI is agreed on a DSA2 as provider and they subsequently advise that the work is outsourced please ensure you are checking the details held on the Invoice Team's supplier database for details regarding HEIs/Supplier arrangements as in many cases an updated letter is not required and we just need to advise we already hold the relevant details on file.

For example, the University of [REDACTED] outsources their Study Skills support to freelance tutors, we've been provided with this information in the past so we're already aware that particular Tutors work on behalf of the HEI and this will be recorded against their entry in the database.


You should initially check the agreed supplier's entry on the database, for [REDACTED] it confirms they 'employ' own NMH a HEI has a contract with [REDACTED] etc it will also be stated here).

SUPPLIER PROCESSING INFORMATION	
2 Quote Exempt - Employs own NMH	
SUPPLIER	[REDACTED] 
University of [REDACTED]	
****PAYEE NAME****	University of [REDACTED]
University of [REDACTED]	
CONTACT	NUMBER OF SEARCH RESULTS
Finance and Planning Department	3
ADDRESS LINE 1	BANK DETAILS LAST UPDATED

If the specific individual or company isn't confirmed as a contractor on the HEI's entry you should then check the entry for supplier who we have been advised will be supplying the support, if the relevant information is provided in the 'Processing Information' section of the database we are OK just to advise that we hold the relevant details on file and there should be no issues with invoices received from the supplier.

SUPPLIER PROCESSING INFORMATION	
Provides support on behalf of University of [REDACTED]	
SUPPLIER	[REDACTED] 
****PAYEE NAME****	[REDACTED]

On occasion there may not be an entry for a supplier - for example this is a new tutor who we have not been advised about previously so there is no information held.

SUPPLIER PROCESSING INFORMATION	
SUPPLIER	[REDACTED] 
****PAYEE NAME****	[REDACTED]
CONTACT	NUMBER OF FEARS/REFUSE

If you come across this scenario, i.e the HEI are advising the tutor works for them but the database does not contain this information please email the Invoice Champs at DSA_invoice_champs@slc.co.uk and we'll review and have the relevant details added into the database if appropriate to avoid further queries, we'll then advise you on how to respond to the HEI.

The supplier database can be found here:

G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance\Invoice Teams\Supplier Database

If you have any queries on how to use the database please seek guidance from an Invoice champ.

****Please note this should not be confused with the change in supplier process****

If when working emails a trend in information being provided/requested is identified from certain HEIs or suppliers please bring this to the attention of your Team Manager as there are potentially steps that can be taken to reduce the number of queries being submitted.

If you have any queries regarding this please refer to your TM or an Invoice Champ.

Study Skills Group Sessions

Following on from the introduction of the NMH Manual, we have been asked if Study Skills Group Sessions will be funded through DSAs. It has been confirmed that this **will not** fall under the remit of DSA as it is not in-line with the new role descriptors in the NMH Manual, therefore we will no longer accept recommendations for Study Skills Group Sessions.

Any students who already have this support agreed in their DSA2 Letter will continue to have this funded, but new recommendations should be declined.

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

The 'click and collect' approach allows students to order a book to be ready to collect from the library, this means they do not have to use the library search functions or look through the shelves to find the book they need. Although generally available to all students, it is of more benefit to a student with a disability or an SpLD. It is often a suitable alternative to library support, and as it is normally a free service it reduces the impact on a students NMH allowance and wouldn't represent a cost to DSA in most cases.

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Travel to placements/fieldtrips etc – 2013/14 onwards

Please note that we only fund additional costs to work placement/fieldtrips/visits etc, if all students are required to arrange their own transportation. If the HEI is providing transport for all other students then it is their responsibility to also provide suitable transport for the disabled students. If it is not clear within the NAR how all other students will be travelling please query this before making the agreement.

[REDACTED]

For the academic year 2013/14 onwards, students travel costs with regard to fieldtrips/visits will be paid from the Travel Allowance; any travel costs associated with a non-medical helper (NMH) as a result of the trip will be paid from the NMH allowance. This will apply to new and continuing students from academic year 2013/14 – other than in those cases where study needs assessment recommendations to the contrary have already been agreed in a DSA2 letter.

[REDACTED]

We can accept further recommendations with sufficient justification from a Study Needs Assessor or Disability Adviser depending on what the additional recommendation is. Further information within this Matrix, regarding agreeing to additional NMH support can be found [here](#).

Source of Support	Percentage of Respondents
Family	45%
Friends	55%
Community	15%
NMH Support	100%

New recommendations for NMH Support (NOT AT TRAINING)
 Increase of NMH Support (NOT AT TRAINING)

Please note as of 17th September 2012 any recommendations for AT Training/ additional hour requests for AT Training must come from Needs Assessors.

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

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[REDACTED]
[REDACTED]

[REDACTED]

[REDACTED]
[REDACTED]

Claims Overview

There are approximately twelve types of student claim that you may come across which are listed below under five main headings:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- Other Claims – [REDACTED] / NMH / [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

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[REDACTED]
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 [REDACTED]
 [REDACTED]
 [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Reimbursement Policy Change

As of 24th January 2013 DSAs are not available to cover the costs of any equipment already bought by the student. Therefore, with immediate effect, students should not be encouraged to buy equipment ahead of their study needs assessment and subsequent SLC approval, as they will not receive any reimbursement for it.

This reflects the stated intent of DSAs that they should be available to cover the additional cost of attending HE resulting from a student's disability. BIS take the view that equipment already in the student's possession cannot be considered to be additional. It is acknowledged that sometimes students purchase equipment without realising they are entitled to support, or that some students may wish to purchase equipment in advance of their course. However this is considered to be the only fair way to apply the policy.

This process should include all items and support, apart from Interim NMH (as the guidance specifically states this can be put in place and reclaimed). This means student claims for any of the following; Equipment, Travel (apart from to the Needs Assessment), Internet, Books, Batteries, Consumables, Photocopying/Printing costs and other miscellaneous items that may be recommended.

[REDACTED]
 [REDACTED]
 [REDACTED]
 [REDACTED]
 [REDACTED]

Non Medical Helper Claims

Please refer to the [PROCESS MAPS](#) for detailed instruction on how to process a NMH Claim.

FAQs

What is required for an NMH Claim? We require a receipt to show that the support has been paid for and a timesheet to show the student has signed to show they have had this support.

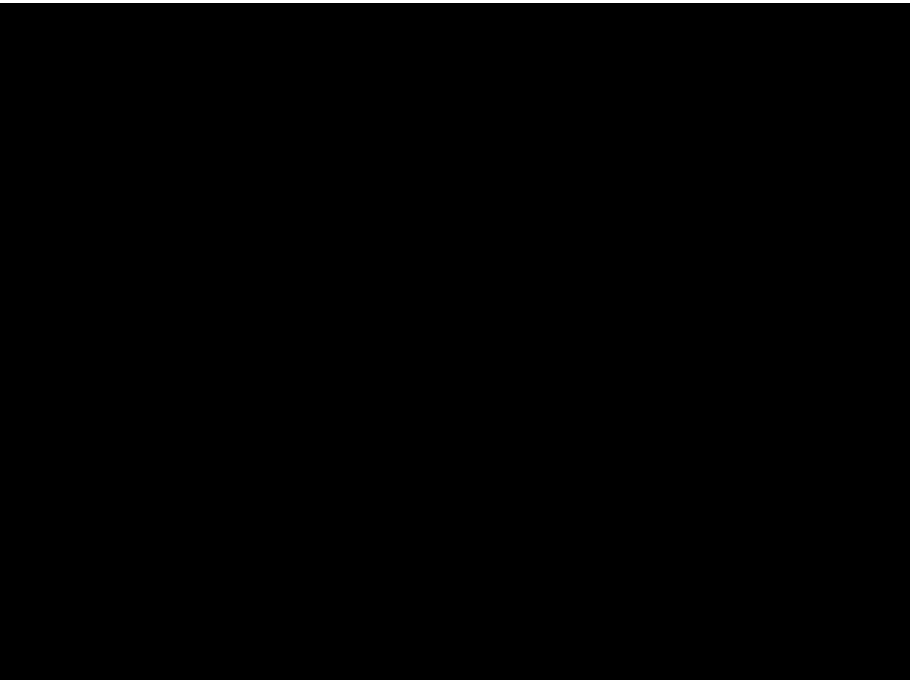
What should the timesheet contain? The timesheet should confirm the date of the support, the areas of support covered during the session, the student's signature to say that they have attended the support, the support workers signature and also a calculation of the amount of hours of support received.

What if the claim is for NMH that has not been agreed? If the support claimed for hasn't been agreed then the disability officer needs to send a recommendation for this support and we are unable to reimburse until this is received and agreed.

What if a claim contains 'typing up time? Some Note Taking invoices include 'typing up time'. This should be counted and deducted from the hours that are taken and remaining.

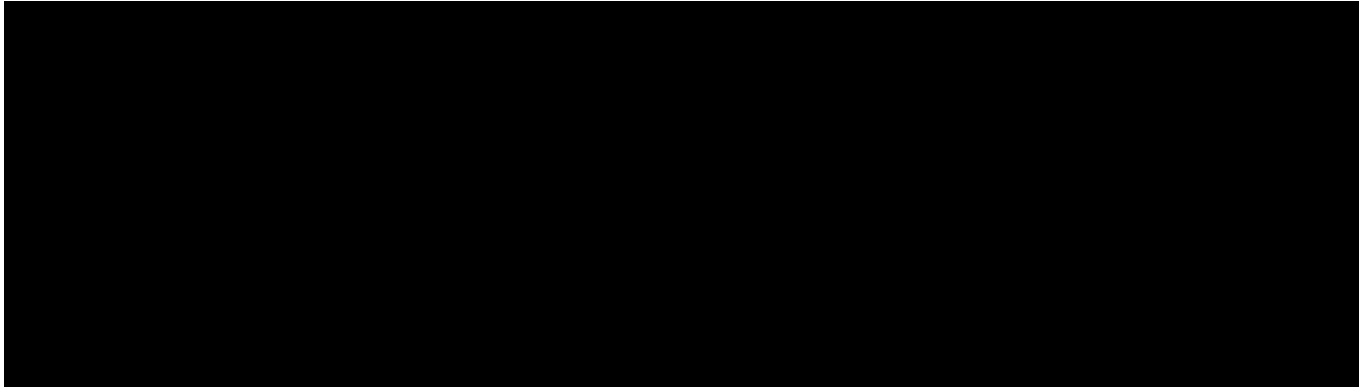
What year should NMH be paid from? NMH support should be paid from the academic year that the support was carried out.

Bar Index	Approximate Length (%)
1	25
2	95
3	80
4	10
5	98
6	100
7	25
8	90
9	95
10	98
11	25
12	90
13	35
14	100
15	40



[Redacted text block]

[Redacted text block]



Assistive Technology (AT) Training Invoices

- When paying an AT Training Invoice, firstly you need to check:
- Has the Student given full DSA Consent to Share (or at least DSA CTS to pay invoices)
- Has AT Training been agreed, and at what cost and for how long
- Who is the chosen supplier to provide the AT Training
- Which Academic Year was the AT Training agreed
- Has a signed timesheet (or signed delivery note) been included with the invoice

NON MEDICAL HELPER INVOICES						
AT TRAINING						
SUPPLIER :		Supplier A				
INITIAL SUPPORT AGREED	3	Half Day	IN TOTAL			
INITIAL + ADDITIONAL SUPPORT AGREED	3	Half Day	IN TOTAL			
RATE AGREED :	€150.00	PER	Half Day			
INVOICE SUPPLIER	INVOICE NUMBER	SESSIONS USED	SESSIONS REMAIN	PAID DATE	AMOUNT	QUALITY CHECKED

AT Training is generally provided and invoiced in either:

Half Days – One half day equals 3 hours

Sessions – One session, typically, is for 2 hours

Individual Hours – e.g. 9 hours

Firstly, see if AT training was agreed, and if so, check the supplier, how many hours/sessions/half days were agreed, and at what cost.

Secondly, we need to see how many hours/sessions/half days of AT Training the student has previously had and therefore how many they have remaining. So from the example above, the student has 3 half days agreed, and has not yet used any of this support.

Now check your invoice for:

The Supplier – Is it the same supplier as agreed on the Student Invoice Database

The price – Is it within the agreed price

The hours – Are the hours within the agreed amount on the Student Invoice Database.

The screenshot shows an invoice form with the following sections:

- Invoice Number:** 12345
- SUPPLIER:** A
- SUPPLIER ADDRESS:** (Redacted)
- Telephone:** (Redacted) **Email:** (Redacted) **Web:** (Redacted)
- Invoice Address:** Student Finance England, PO Box 210, Darlington, DL1 9HJ
- Invoice Summary Details:** Invoice Number: 12345, Date: 03/07/13, Ref No: (Redacted), Student Name: (Redacted), Account No.: (Redacted)
- Delivery Address And Details:** (Redacted)
- Table:**

Quantity	Equipment / Service Details	VAT Rate	Unit Price	VAT Amount	Net Amount
1.0	2 Hours Training on Specific Supplied Accessibility Products	0.00	£100.00	£0.00	£100.00

With AT Training invoices we also require a timesheet that has been signed by the student and the support worker. This must also show the date and times of the support (this could be in the form of a signed Delivery Note)

The screenshot shows a Delivery Note form with the following sections:

- DELIVERY NOTE:** 13267
- SUPPLIER:** A
- SUPPLIER ADDRESS:** (Redacted)
- Telephone:** (Redacted) **Email:** (Redacted) **Web:** (Redacted)
- Delivery Address:** (Redacted)
- Contact Details:** (Redacted)
- Summary Details:** Delivery Date: 03 July 2013, Ref No: (Redacted), Supplier Name: (Redacted), Account Ref: (Redacted)
- Table:**

Quantity	Equipment / Service Details
1.0	2 Hours Training on Specific Supplied Accessibility Products

Signature: (Redacted)
Date: 03/07/13
Name: (Redacted)

If the invoice is for both AT equipment and AT training **do not split this invoice. Contact the supplier and ask them to resubmit as two separate invoices – one for equipment and one for AT training.**

- We will pay for any missed sessions and these are not deducted from the hours agreed. Please check the [Missed/Cancelled Sessions Section](#)

AT Training is paid from the academic year that it was agreed.
 AT Training invoices are paid from the Non Medical Helpers Allowance

Non-Loan Products					
Payment Totals	Maximum	Assessment <input type="checkbox"/>	Authorised	Remaining	Create New Payment
DSA - Non Medical Helpers	20,520.00	<input type="text" value="17520.00"/>	689.59	16,830.41	
DSA - Equipment	5,161.00	<input type="text" value="1543.50"/>	1,543.50	0.00	New Period of Study
DSA - General					
What is payment for?					
<input type="radio"/> Photocopying	1,724.00	<input type="text" value="350.00"/>	0.00	350.00	
<input type="radio"/> Consumables (batteries, cartridges, paper)					
<input type="radio"/> Other					
DSA - Travel	n/a	<input type="text" value="0.00"/>	0.00	0.00	Save Assessment Changes

Non-Medical Helper Invoices

On 31st March 2014 the NMH Service Manual went live. From this date, support workers will be required to adopt the descriptors used in this manual on their invoices when providing support that was recommended on or after 31/03/2014. Please refer [here](#) for more information.

When paying Non-Medical Helper invoices, first you need to check:
 Has the student given full DSA Consent to Share (or at least DSA CTS to pay invoices)
 Has the support type been agreed
 Who is the chosen supplier to provide the support
 What is the agreed hourly rate of the support
 How many hours are agreed, and how many are available.
 How many hours are being invoiced
 Has a signed timesheet (or acceptable alternative) been included with the invoice

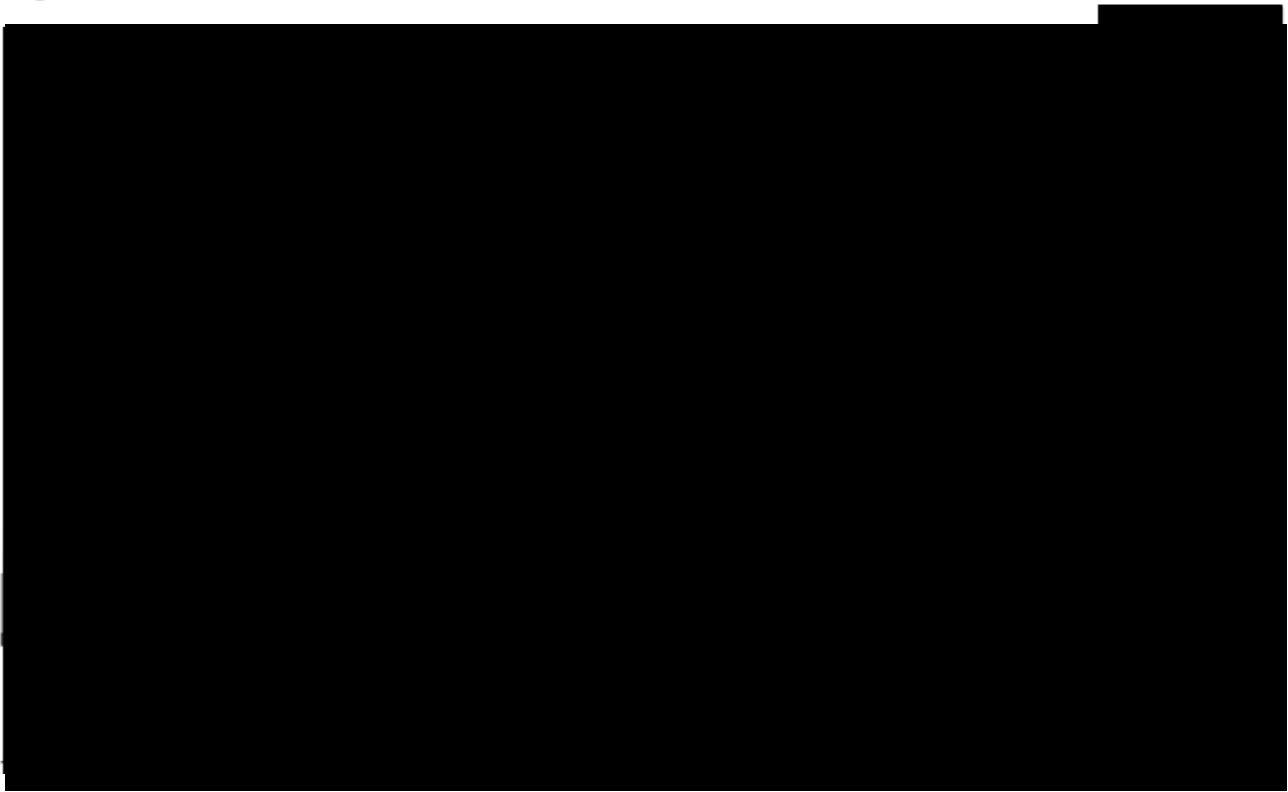
Please note that not every supplier will use the same term for the same support type.
 For example, Study Skills may be called Dyslexia Support, or 1 to 1 Tuition, amongst other terms. The DSA Officers should record the support on the Invoice Database/DSA2 letter as it was given on the quote in the NAR, so the name of the support on the invoice should match.
 The support type should be clearly labelled on the invoice, however if not you can check the hourly rate on the invoice against the student's Invoice Database to try and determine the support, or could also check the timesheet as these generally list the support type.

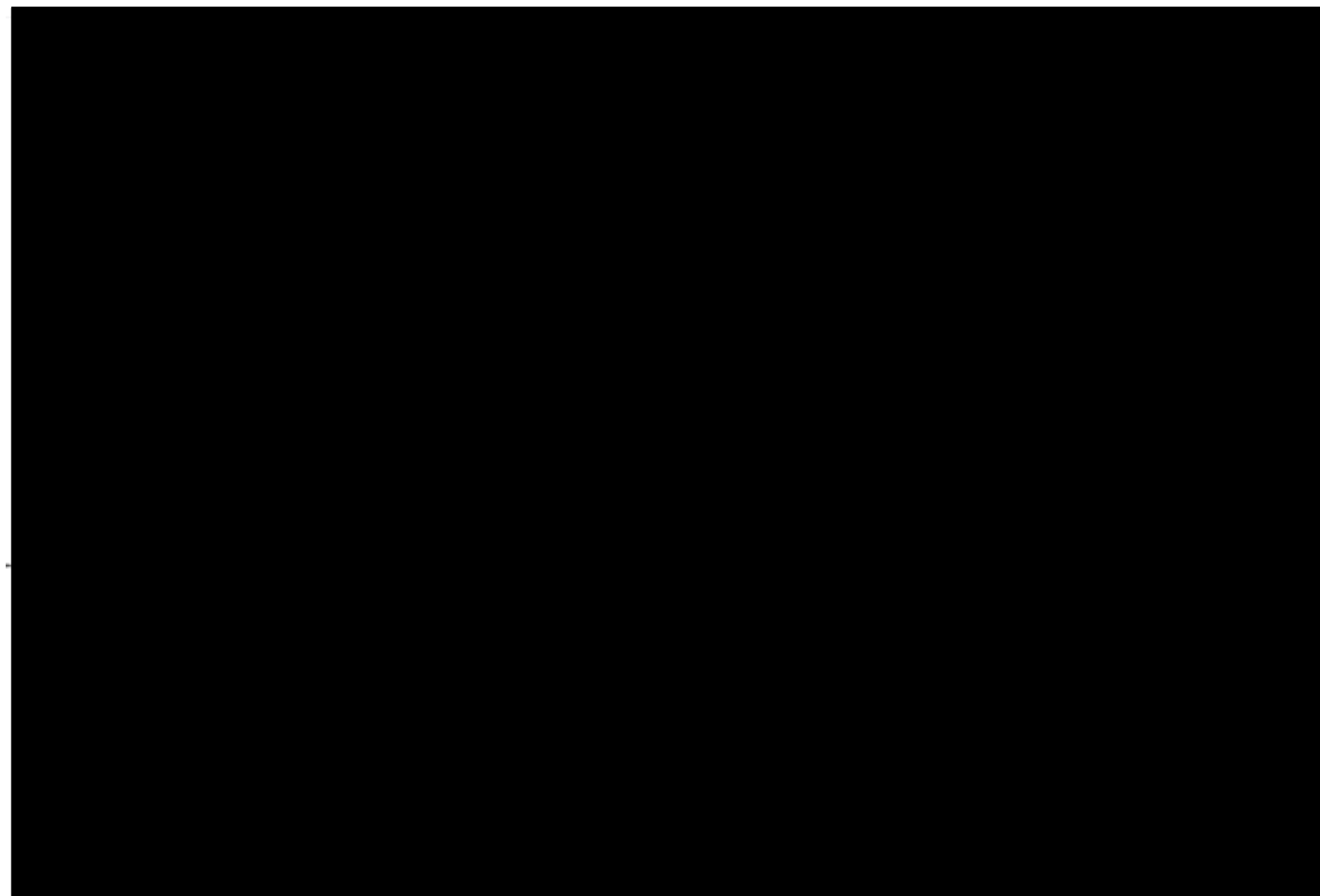
Important: When checking the agreed hours, please check to see if the hours are agreed per Academic Year, or In Total (also termed as Course Duration).

NON MEDICAL HELPER INVOICES						
Study Skills Support						
SUPPLIER :		University of Life				
INITIAL SUPPORT AGREED	30	Hours	PER	ACADEMIC YEAR		
INITIAL + ADDITIONAL SUPPORT AGREED	30	Hours	PER	ACADEMIC YEAR		
RATE AGREED :		£65.00	PER	Hours		
INVOICE SUPPLIER	INVOICE NUMBER	SESSIONS USED	SESSIONS REMAIN	PAID DATE	AMOUNT	QUALITY CHECKED
University of Life	12345	2	28	08/05/2013	£130.00	Yes
University of Life	67890	3	25	28/05/2013	£195.00	
University of Life	54321	1	24	17/07/2013	£65.00	
University of Life	9876	4	20	02/08/2013	£260.00	Yes

Once you have determined the support type, you need to ensure that there is a timesheet accompanying the invoice. The timesheet must include the full amount of hours being invoiced, and all support must be signed for by the student and support worker. Assuming that the support was agreed, the student has enough hours available, the cost is appropriate, relevant DSA CTS has been given and all sessions are signed for, you can then proceed to pay the invoice.

Example layouts of invoice and timesheet are given below.





Non-Medical Helper invoices are paid from the academic year that the support was provided. You can check which year it was provided by looking at the dates on the timesheets.

If you get one invoice for support provided over two academic years **do not split this invoice. Contact the supplier and ask them to resubmit as two separate invoices – one for each academic year.**

If you are unsure which year(s) to pay the invoice from, please refer to the [Academic Year guide](#).

Non-Medical Helpers Invoices are paid from the Non-Medical Helpers Allowance.

Non-Loan Products					
Payment Totals	Maximum	Assessment <input type="checkbox"/>	Authorised	Remaining	Create New Payment
DSA - Non Medical Helpers	20,520.00	<input type="text" value="17520.00"/>	689.59	16,830.41	
DSA - Equipment	5,161.00	<input type="text" value="1543.50"/>	1,543.50	0.00	New Period of Study
DSA - General					
What is payment for?					
<input type="radio"/> Photocopying	1,724.00	<input type="text" value="350.00"/>	0.00	350.00	
<input type="radio"/> Consumables (batteries, cartridges, paper)					
<input type="radio"/> Other					
DSA - Travel	n/a	<input type="text" value="0.00"/>	0.00	0.00	Save Assessment Changes

Guidance on Supporting Documents/Timesheets

Why do SFE need to see a timesheet to support invoices?

SFE administer DSAs for eligible students. In order to release payment from the student's allowance SFE need to see that the student has received the support invoiced. Timesheets provide this information.

When are timesheets needed to support invoices for payment?

A timesheet is needed to support all invoices relating to Non-Medical Helper and Assistive Technology (AT) Training.

What information should a timesheet include?

A timesheet should include the following information:

Name of the Company/HEI/Support Worker invoicing for support undertaken

Student's full name

Student's CRN

Date of each support session

Support type provided in each session

Start and finish times of each session

A student signature confirming the support was received

We would also *prefer* to see (however this isn't a requirement):

Total number of hours per support type

If not present on the invoice (or the timesheet is incorporated in the invoice) – Company/HEI/Support Worker's address and contact details

Invoice number the timesheet links to

Hourly rate per support type (helps us to identify support types)

A notes box (useful to explain missed sessions or circumstances leading to lack of signature)

When can I accept a NMH or AT Training invoice with no timesheet?

The timesheet is 'built in' to the invoice (i.e., a full breakdown of support dates, times and types is provided) and the Invoice is Signed by the Student.

The HEI uses [REDACTED] system; a timesheet must be present on [REDACTED] for the student and must not be authorised by the student's HEI unless Portal Notes show there is a specific agreement by a Team Leader for this.

Please note this is not an exhaustive list and any doubts should be discussed with your Team Leader:

When Can I Accept an Email in Lieu of a Timesheet?

The company/HEI/support worker can demonstrate (usually within the e-mail chain or by an attached form) the reason no timesheet is provided.

The company/HEI/support worker can demonstrate (usually within the e-mail chain or by an attached form) any steps taken to obtain a signed timesheet.

The e-mail gives the standard information required on a timesheet (i.e., sets out the session dates, times and support given).

There is a clear response from the student (via their HEI e-mail address or the e-mail address we hold on Portal) confirming the support was provided as per the breakdown.

Please note this is not an exhaustive list and any doubts should be discussed with your Team Leader:

Email Confirmations of Support

Occasionally providers of AT Training and NMH Support will be unable to obtain ink signatures from students to confirm attendance at a session. We can accept an email confirmation providing that:

- The email sets out the support provided and the dates in question.
- There is a statement confirming the information provided is correct.
- It is clear that the confirmation has been obtained from the student - **preference is for an email from the Student's HEI email address or the email address the student has registered with SFE.**

Management have agreed that we can accept email confirmation from the students HEI email address, you should be able to determine the email has in fact come from a HEI email and has been sent by the student. Sometimes you may find that the name of the student is not contained within the HEI email address but it is clear that this is in fact a HEI email, however with the absence of the students name we would expect the student to have confirmed their name in the body of the email, or that you have spoken to the student who is able to confirm the e-mail address.

If the student does not include their name in the body of the email but their name appears next to the email address as if automatically populated, like our SLC email addresses do, then we should accepting these email confirmations.

Should the confirmation come from an email address that is not clearly the student's HEI email, or the address registered on Portal, we should take the following steps:

- Call the student and ask them to confirm the information in the email. Ask if they would like to change the email address registered with SFE.
- If you are unable to call or can't get through - Email the student, using the address on the Portal, and ask them to confirm the details in the attached email. Ask if they would like to change the email address registered with SFE.

Please also refer to the Guidance on Supporting Documents/ Timesheets article [above](#).

[Redacted content]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Agreements In Absence and Exam Support

Where this type of NMH is recommended in the NAR we would expect this to be made clear on the DSA2 letter so the invoice staff have clear access to what has been agreed. Reminders will be issued to DSA Officers to include the relevant information on the DSA2 letter. Going forward this should reduce the amount being passed to the Invoice Champions. However, existing cases may still need to be referred to the Invoice Champions as they are now for DSA2 letters to be updated where necessary.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Exam Support

With effect from Monday 24th November 2014 there will be a process change with regards to receiving an invoice for exam support, where this has not been agreed on the DSA2.

Prior to this date, in cases where we have received such an invoice and the exam support had not been agreed on the student's DSA2 letter, we would refer the case to the invoice champs so that they could check the student's needs assessment for an exam support recommendation that may have been missed during the initial review of the NAR. The invoice champ would then either update the DSA2, or contact the disability adviser to request a recommendation for the support.

With the introduction of the new NMH descriptors, this has caused a significant increase in cases being referred to the champs. Since exam support could fall within a number of the new descriptors (e.g. reader, scribe, examination support worker), it will not always be agreed under the blanket term of "Exam Support". From 24/11/2014, these cases will **no longer be referred to the invoice champs** and should be processed in the same way you would process any other support which has not been agreed. The member of staff reviewing the invoice for payment should contact the supplier (copying in the disability adviser where appropriate) using the "DSA NO AGREEMENT" email template.

If anyone has any questions regarding the above process change, please speak to your team manager.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[illegible]

© 2006 The Authors

[REDACTED]

[REDACTED]

[REDACTED]

NMH Agreed Hours Exceeded

If, upon receipt of an invoice for NMH, you realise that there are not enough hours remaining for you to be able to pay the invoice then you will need to advise the Disability Officer and Supplier that the invoice will take the amount of hours over the agreed amount. The Disability Adviser/Supplier/Assessment Centre will be able to put a recommendation in to ask for additional hours (Note: only a Needs Assessor can recommend additional AT training). There is a standard email template in the [Invoice Letters Folder](#) for this scenario called 'DSA NMH HOURS RAN OUT'

Important: Do not confuse exceeding of the students agreed number of hours with the student exhausting their maximum NMH allowance. There are separate letters for these two events.

NMH Allowance Almost Exhausted

Upon receipt of an invoice for NMH you should check the amount of funds available for NMH by viewing the Non Loan Products screen. You can still pay this invoice (subject to the usual checks etc) but if, after paying the invoice, the remaining funds are less than £3000 of the students maximum allowance you will need to contact the student, Disability Officer and Supplier (subject to relevant DSA CTS) to advise them what remaining funds are available. There is a standard email template in the [Invoice Letters Folder](#) for this scenario called 'DSA NEARLY EXHAUSTED ALLOWANCE'

Important: For part-time students starting in 2013/14 and later, the NLP screen for NMH will not be set at £3,00 less than the maximum and will instead be set at the absolute maximum. This means you won't be able to rely on the 'trigger' of having to revise the NLP screen but will instead have to manually calculate when the student is within £3,000 of their allowance limit.

Exhausted Allowance - Using General Allowance (GA)

Where an invoice for Equipment or NMH cannot be paid due to the allowance being exhausted*, usually the invoice would be rejected. However, it has been agreed – as of the 4th September 2013 – that the case will be passed to DSA Officers () - please email all 3 with the details), to explore if there is any unallocated General Allowance (GA) available to use. If so, they would update the DSA2 letter to advise the student that we have used some of their GA to supplement other allowances. If not, they will call the student to discuss this and see if they are willing to substitute some of their GA, which would then be updated on the DSA2 letter and the invoice paid. Please note this does not apply to PG students as they only have one allowance so do not have a General Allowance to top up the others.

**Exhausted Allowance - this is when the maximum the student is entitled to has been reached e.g. Full Time Students: Equipment £5161 / NMH £20520 (or for 2014/15, Full time maximums of Equipment £5212 / NMH £20725)*

Please refer to the [process document](#) for full details. The process document is also in the DSA Forms and Guides Folder.

No Agreement for Support

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

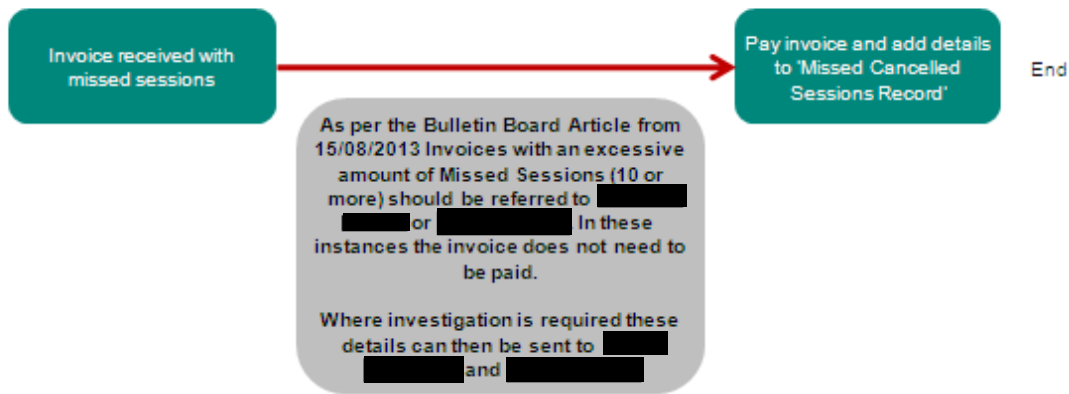
No Shows/Cancelled/Missed NMH Sessions

When you receive an invoice which contains no shows/cancelled/missed sessions, if no reason has been provided on the invoice, you should contact the Supplier and Disability Officer to ask why the sessions were missed and if the student had given any notice. You can do this using the template '[DSA MISSEDCANCELLED SESSIONS](#)'. This includes Randstad.

Missed sessions must be recorded on the [Missed Cancelled Sessions Record](#) which can be found here:

[G:\SFD_PILOT\Processing\Team Specific Information\Scanning Reports\DSA\Team Reports\Missed Cancelled Sessions Record](#)

INVOICE TEAMS



Depending on the supplier, there are two main scenarios that could apply, [see here](#).

No shows/cancelled/missed sessions with acceptable justification can be paid. However SFE will not continue to pay for NMH provision that is repeatedly not taken.

If processing an invoice where there are several cancelled or missed sessions, please ensure that these sessions are deducted from the hours/sessions agreed as per the DSA2 letter (unless work instructions for that case state otherwise). Clearly note the LA Portal confirming how many of these sessions have been missed/cancelled.

Important: Please note this would be different for AT Training in that the hours are not deducted.

If you can see that the Student has had previous missed/cancelled sessions, you need to search the students name on the spreadsheet for previous entries. What you are looking for is the last set of comments or actions taken by the DSA Officers. If there is an instruction, simply follow the instructions. If there are no instructions, fill out the spreadsheet and continue to pay the invoice.

NOTE: Where an invoice includes 10 or more missed/cancelled sessions, these invoices must be referred to a Team Leader. In turn these will be passed for Investigation as per the above process map.

When an Invoice containing missed sessions is paid, you must include this in you notes, example:

A/Y ___/___
Support Type:
Invoice Number:
Supplier Name:
Taskspace Case ID:
Hours Agreed: ___
Hours Available: ___
Hours Invoiced: ___ (including ___ cancelled session(s) on the date ___/___/___)

Hours Remaining: ____

When filling out the Invoice Pilot/Database for this invoice, you also need to fill out the missed/Cancelled Sessions Log at the top right of the Pilot/Database. The date to be entered onto this sheet should be the payment date.

Recording missed/cancelled sessions in the Pilot:

- The **date** field in the Pilot should be the date the invoice **was paid** on.
- The fields marked 'paid' and 'authorised' do not need to be filled with amounts or name. Instead please enter the **invoice number** the missed session was on.
- In the **notes**, please enter the **date/s the missed session/s** was on, and the **justification** as provided by the supplier.

MISSED SESSION LOG				
DATE	SESSION TYPE MISSED	PAID	AUTHORISED	NOTES
04/02/2014	AT Training		on [redacted]	cancelled session 15/01/14 due to illness
payment date			invoice number the session was found on	date of missed session
				and
				justification for absence - e.g. illness, family issues, disability-related, university-cancellation

Important: For Non Medical Helper Support invoices, we still deduct the missed/Cancelled sessions from the Student Support. However missed/cancelled sessions for AT Training must not be deducted. Example note:

AT Training

Hours agreed: ____

Hours available: ____

Hours Invoiced ____ (Includes Cancelled session on the __/__/____)

Hours remaining: ____

NMH DSA Late Time-table Change/Support Session Cancelled

Scenario 1 - HEI Provide NMH Support

New Cancelled and Missed Session Spreadsheet v3 [Shared] - Microsoft Excel

	A	B	C	D	E	F	G	H
	Assessor	Date	Name Of Student	CRN Of Student	Name Of Supplier	Type of Support	Missed or Cancelled Session	Date of Session Missed
1375		14/01/2013				AT Training	Missed	11/12/2012
1376		14/01/2013				AT Training	Cancelled	13/12/2012
1377		14/01/2013				NMH - Study Skills	Missed	07/11/2012 & 14/11/2012
1378		14/01/2013				AT Training	Cancelled	12/12/2012
1379		14/01/2013				NMH - Mentor	HEI Cancelled Session + HEI NMH Provider	11/12/2012
1380							Missed	
1381							Cancelled	
1382							HEI Cancelled Session + HEI NMH Provider	
							HEI Cancelled Session + Independent NMH Provider	

It has been determined that where a missed session is due to cancellation by the HEI and the support worker is provided by the HEI, no payment will be made for this missed session from a student's DSAs. This is outside of a student's control and the HEI would be expected to cover these situations through its own processes. You will need to reject the invoice but please also log this on the missed/cancelled session log. Please select HEI cancelled session from the drop down as shown below.

Scenario 2 - Provider of NMH is Independent ()

We will continue to pay for these invoices where the provider of the NMH is Independent for example or . However you must also ensure you log these on the missed/cancelled session log as shown in the example below. If you have any questions please refer to your Team Leader

New Cancelled and Missed Session Spreadsheet v3 [Shared] - Microsoft Excel

	A	B	C	D	E	F	G	H
	Assessor	Date	Name Of Student	CRN Of Student	Name Of Supplier	Type of Support	Missed or Cancelled Session	Date of Session Missed
1375		14/01/2013				AT Training	Missed	11/12/2012
1376		14/01/2013				AT Training	Cancelled	13/12/2012
1377		14/01/2013				NMH - Study Skills	Missed	07/11/2012 & 14/11/2012
1378		14/01/2013				AT Training	Cancelled	12/12/2012
1379		14/01/2013				NMH - Mentor	HEI Cancelled Session + Independent NMH Provider	11/12/2012
1380							Missed	
1381							Cancelled	
1382							HEI Cancelled Session + HEI NMH Provider	
							HEI Cancelled Session + Independent NMH Provider	

Same Missed/Cancelled Sessions - Different Invoices

Recently there have been a number of examples of a second invoice, with a new invoice number, arriving for the same missed/cancelled session as already claimed under a previous invoice. Although these particular examples related specifically to one supplier - - it is possible that this may be happening with others.

Therefore, going forward, whenever we receive an invoice for a missed/cancelled session, we need to add the date of the missed/cancelled session to the portal note:

A/Y --/--

Support Type:

Invoice Number:
Supplier Name:
Taskspace Case ID:
Invoice for ___ hours
Missed/Cancelled Session of ___ hours on __/__/____

When invoices for missed/cancelled sessions are received and there have been previous Missed/Cancelled sessions please check the Portal, Missed/Cancelled Session spreadsheet and invoice databases to see which of the previous invoices contained the missed/cancelled session(s). Then please view these invoices and cross check the dates. If the evidence suggests that the same dates have been invoiced twice - please reject the invoice and raise a query with the supplier. Ensure your Portal notes gives the reason for the query and contains the relevant dates and invoice numbers.

A/Y --/--
Support Type:
Invoice Number:
Supplier Name:
Taskspace Case ID:
Invoice for ___ hours
Queried with supplier as invoice contained ___ hours missed/cancelled session of ___support___ on __/__/____ because _____.

No student approval is required for missed/cancelled sessions. If a timesheet has not been signed (by the student) for the missed/cancelled session, we can pay this as long as a reason for missing/cancelling has been provided.

We don't need to necessarily see evidence that the reason has come from the student. If we receive an email reply from the HEI which just states the student was ill and cancelled the session, this would be acceptable.

If when working the inbox or invoices you come across email history from the student and HEI/supplier providing the missed/cancelled session reason, the email address does not need to be validated against the email address on portal or checked that it's their HEI email address.

We would only need to validate the student's email address if the student is providing **confirmation of receiving** support.

No Show sessions on invoices.

When receiving invoices which include No Show Sessions we need to identify why the student did not attend these sessions in the same way as we would with a missed/cancelled session. We therefore expect the suppliers to contact the student after the session was missed, and to let us know the outcome of this attempt. A timesheet/invoice which simply states 'No Show' or 'Did Not Attend' should be queried and the invoice not paid until the supplier has provided us with a more detailed justification. In these cases please raise a task and email the supplier using the '**DSA No Show Email**' template located here:

G:\SFD_PILOT\Processing\Team Specific Information\Specialist Support\Disabled Students Allowance\DSA Letter Templates

When a supplier can demonstrate that they have attempted to contact the student but no response has been forthcoming, there could be little else that they would be reasonably expected to do. Therefore, if a supplier informs us (either on the timesheet, or via email) **how they attempted to make contact** (e.g. through a phone call, an SMS, email etc) **as well as the date this contact was attempted** - we would pay the invoice and record the session as Did Not Attend in the missed sessions database*.

41564	1	£66.00	£66.00	Other - Please add comment	
05/11/2013	1	£25.00	£25.00	Illness	
21/11/2013	1	£60.00	£60.00	Illness	
04/11/2013	1	£60.00	£60.00	Student did not attend	Supplier emailed the student about this DNA at 12:00 on 01/02/2014 but student has not replied
11/11/2013	1	£66.00	£66.00	Illness	
09/12/2013	1	£140.00	£140.00	Illness	
19/11/2013	1	£25.00	£25.00	timetable change	

*NB- this is the only time this option should be used as there would normally be another category in that drop-down list which would more accurately capture the reason for non-attendance.

Please also note that this check is in addition to the standard checks required when dealing with any missed/cancelled sessions, including the flowchart on page 192 of the Matrix, and referring to a TL when there are 10 or more missed sessions on any one invoice.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[Redacted]

[Redacted]

No Timesheet

If an invoice is received for NMH that is not accompanied by a fully completed timesheet, or [acceptable equivalent](#), then this would need to be requested from the supplier. Before requesting this you should check previous Case ID's on Taskspace as it may be that the timesheets has been scanned onto another piece of DSA evidence or as a separate document. If the timesheet is still not there you will need to request this using the standard email template in the Invoice Letters Folder, 'DSA TIMESHEET REQUIRED'

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[Redacted]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Risk Assessment / Health & Safety Audit fees

The cost of a supplier carrying out Risk Assessment / Health & Safety Audit, so they can provide support in a student's home, needs to be included in the hourly rate as per other administration/travel costs for NMH.

The most common example we see is from [REDACTED] who charge approximately [REDACTED] for this Risk Assessment. [REDACTED] will be contacted to advise them of this update.

Invoices and recommendations that are received should be queried as we would do with the other administration/travel cost.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Student's choice of NMH supplier / Wrong Supplier

It has been brought to our attention by a particular supplier that there have been complications with us paying invoices because the supplier was not the original agreed supplier of NMH/AT Training on our DSA2 approval letter.

Firstly, if you have received an invoice from a supplier who were not originally agreed then you need to check whether we have been made aware of this or not. If not, then your first port of call should be to contact the student to confirm this. If you are not able to get in touch with the student then you should call the supplier who has delivered the support. In every instance, please use the telephone to confirm this, only using email as a secondary method.

With DSAs, the student can exercise their right to choose where they receive their support from. We need to be supportive of the student's choice and should look to pay these invoices. However, we also have to balance this with effective management of public funds.

We will always look to pay invoices where the difference in price from the original quote is marginal. What can be considered marginal really depends on what is being claimed. Please use common sense and escalate to management/TL for a decision if you are unsure. We do have a responsibility to challenge costs which appear unreasonable, so we should look to contact the student and supplier to request further information if we feel this is necessary. We do need to bear in mind though that charges are always going to differ as company business costs can vary greatly, depending on the size of their operation plus regional differences etc.

Group	Bar Index	Relative Length (approximate)
Group 1	1	100%
	2	90%
	3	60%
Group 2	4	55%
	5	100%
	6	95%
Group 3	7	25%
	8	98%
	9	85%
Group 4	10	98%
	11	100%
	12	95%
Group 5	13	40%
	14	98%
	15	95%
Group 6	16	100%
	17	98%
	18	50%

Support Type Unknown

If, upon receipt of an invoice for NMH, you are unable to determine what type of NMH support the invoice is, you will need to request this information from the supplier. This could happen when the type of support is not detailed on the invoice/timesheet, or when there are multiple types of support and you cannot determine the amount of hours allocated to each support type. There is a standard email template in the Invoice Letters Folder for this scenario called 'DSA SUPPORT TYPE, HOURS REQUIRED'

Useful Hints and Tips

- Not every supplier will use the same term for the same support type. Study Skills Support may also be called Dyslexia support, Specialist support or Tutor support.
- Always avoid putting the name of a student's disability into a note.

- The support type should be clearly labelled on the invoice. However if not, we may be able to work out which support type by comparing the hourly rate on the invoice to that on either the Invoice Pilot Spreadsheet/DSA2 letter or the NAR, and also by checking the timesheets as these often have a list showing the different levels of support.
- Some NMH Note Taking invoices include “Typing up Time”. This should be counted and deducted from the hours that are taken and remaining.
- If an allowance has been fully exhausted you may be able to use the General Allowance for any shortfall, please refer to a Team Leader for further advice on this.
- Apportioned cost for a shared support- e.g. Note Taker. A note taker may take notes during lectures for more than one student at a time and this is reflected on the invoice by an apportioned hourly rate and number of hours. We still count the number of hours in full and not the apportioned hours.

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED].

VAT on NMH Invoices (Including AT Training)

Queries have been brought up regarding if we should pay the VAT on AT training and NMH Invoices where the quotes do not include VAT. This has been checked and you should pay these invoices if they include VAT even though they had not been quoted with this cost. The reason is that we cannot control where VAT is charged and it appears to be different depending on what council the supplier is under as they all appear to have different rules.

Suppliers and Needs Assessors are aware that the costs that are quoted should be full costs and inc VAT (and any other costs) or it should be stated otherwise so we know to allow for this to be added. However we should not delay this invoice and payment can be made. A reminder was put on the DSA Bulletin which Needs Assessors and Suppliers receive to remind them that we need to have the correct figures on a quote.

NB – The above guidance includes Invoices for AT Training.

[REDACTED]

[REDACTED]
[REDACTED]

[REDACTED]

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[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Non-medical helper (NMH)

[Click here to view as SEPARATE DOCUMENT](#)

Question: How do we communicate to students that they have a choice in who their non-medical helper is?

Answer: The assessor should recognise that where a student has already been working closely with a specific non-medical helper, the student can choose to continue working with this non-medical helper. Where this is a preference or choice of the student, this should then be recommended in the needs assessment report.

Question: Does that expand to other services, for example, if a particular trainer is more effective?

Answer: The regulations allow the students to make a choice about their preference. The needs assessor will advise the student of their options and a joint decision will be made within the recommendation of the needs assessment report. Provided there is appropriate justification within the needs assessment report, this will be supported by Student Finance England.

Question: Needs Assessment Centres are now recommending a variety of hours to suit the individual students' needs. If 30 hours per year has been recommended, will Student Finance England support this?

Answer: We rely on the needs assessor to give us the information. If the needs assessor recommends 30 hours per year, we will support 30 hours per year where there is clear justification.

Question: If the Needs Assessment Centre recommend a flexible approach but up to a maximum of 30 hours per year, will Student Finance England support the recommendation?

Answer: We are aware that some students may need support one week and perhaps none for the following week. We will support flexibility where this suits the needs of the student.

Question: If we need to increase the amount of NMH support a student receives, how do we do this?

Answer: If, in consultation with the student and the NMH provider, it is considered appropriate to increase a student's previously recommended non-medical helper provision, we require written justification detailing the number of additional hours and the hourly cost. We will accept this justification from the Disability Practitioner within HEI, the NMH provider or the Needs Assessment Centre.

Question: How will you counterbalance the very obvious fiscal incentive for the support provider to persuade the student that they require an increase in the previously recommended NMH?

Updated: June 2011

Answer: We allow NMH suppliers to agree additional support recommendations (with clear justification) on the understanding that NMH suppliers are often in the best place to understand the student's requirements. We have a responsibility to closely monitor costs and there may be times where we need to contact the supplier, the Disability Officer or the student for further information about NMH recommendations. We want to build good working relationships with all parties involved and will use our own experience to identify 'the reasonable' from the 'unreasonable', contacting the supplier, Disability Officer or student if necessary.

Question: If a HEI asks for additional recommendations, other than NMH support, does the HEI need to notify the needs assessment centre of the student's requirements? Or can the disability practitioner make a request straight to Student Finance England?

Answer: SFE will accept recommendations from the Disability Team within the HEI for General Allowance and NMH. For additional equipment or software, the HEI will need to refer back to the Needs Assessment Centre and ask that they submit notification, with justification, direct to Student Finance England.

Question: If a student starts their course at an HEI before they have their Needs Assessment, will Student Finance England support non-medical helper support put in place by the HEI?

Answer: Yes, Student Finance England acknowledge that there may be circumstances where a student's non-medical helpers support may have to be put in place prior to the student attending a Needs Assessment Centre. We will reimburse the HEI's costs prior to the needs assessment report being implemented or agreed, provided there is a recommendation for the support within the needs assessment report.

Question: Can NMH support be put in place for returning DSA students prior to the start of term, to aid with planning and organisation?

Answer: Yes, provided the support reflects the recommendations of the Needs Assessment Report and does not exceed the number of hours of support agreed. Invoices however, should not be submitted until after the start of term.

Question: Who takes responsibility for monitoring a student's DSA spend, where they might exceed the maximum for non-medical help support and where money might be paid to more than one supplier?

Answer: We have put in place a new process to make us more proactive in monitoring spending and alerting the HEI / NMH supplier and the student when support levels are rapidly diminishing. We have established a dedicated payments and claims team who are responsible for managing all payments and monitoring spend and have set tolerance levels which, when reached, will trigger the escalation of the case and result in contact being made.

Question: Do we still need to submit Individual Learning Plans?

Answer: No, we no longer need Individual learning plans.

Non Medical Helper - invoicing and timesheets

Question: Can HEIs and NMH suppliers send scanned copies (electronic versions) of invoices to SFE? Are signed timesheets still required?

Answer: No, as of 11th June 2012 we can only accept invoices via post. Student Finance England has set up the following dedicated postal address for invoices: Student Finance England, Memphis Building, Lingfield Point, PO BOX 294, Darlington, DL1 1RW

Question: What if a student has not signed their timesheet or has not attended a session?

Answer: Generally, we must have signed timesheets before we can make a payment. However, in exceptional circumstances, we may accept confirmation from the Disability Adviser along with an explanation of the circumstances for a non signature. This is at the discretion of the DSA Manager at Student Finance England.

Question: What happens if a student misses a session and does not contact the provider to cancel?

Answer: SFE expects that providers of NMH support have robust procedures for monitoring attendance and reasons for any non-attendance should be reported on the timesheet. If a student has missed a session and did not give notice within the provider's cancellation timeframe, SFE will still make payment as long as clear justification has been provided.

If the student has missed more than two sessions in the academic year, without any justification, we require that support be put on hold whilst the circumstances are looked into. SFE will look to work in partnership with the Disability adviser at the HEI and/or NMH provider to seek reassurance that the circumstances have been discussed with the student and attendance strategies are agreed for the future.

SFE will only pay up to a maximum of two missed sessions where no justification has been provided. We do advise the student of this and inform them that they may be liable for the cost of future cancelled sessions where no justification is given. We also remind the student of the importance of cancelling the session with proper notice - although we do appreciate that this is not always feasible.

Question: Can NMH suppliers charge additional costs for travel and parking on top of their agreed rates?

Answer: No, these costs should be quantified and factored into business costs by NMH providers.