

Advanced Learner Loans funding and performance-management rules

for the 2016 to 2017 funding year (1 August 2016 to 31 July 2017)

Version 4

November 2016

Of interest to providers and employers delivering provision funded by learners through Advanced Learner Loans

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Summary of main changes since Advanced Learner Loans Funding and Performance Management Rules 2016 to 2017 V3

- We have highlighted the main changes from version 3 (V3) of the Advanced Learner Loans Funding and Performance Management Rules 2016 to 2017 as set out in the table below.
- We have made the updates in the Performance Management Section which sets out changes to the process for requesting an increase to your loans facility.
- If you have a specific query on the funding rules, please email servicedesk@sfa.bis.gov.uk.

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Section	Paragraph number	Change
	F1	Change to reflect that providers now hold a loan facility and loans bursary fund agreement with the Secretary of State for Education acting through the
		SFA.
	F34	Change to reflect that it is now the Secretary of State for Education who is responsible for designating the qualifications eligible to be funded with loans.
Performance Management	F132	We have added the action we will take if you exceed your loans facility without our permission.
	F149	We have introduced a requirement for you to have used at least 75% of your loans facility to be eligible for an increase in your loans facility.
	F150	We have introduced a limit to the amount of loans facility you can apply for if you do not already have a loans facility and are applying for one for the first time.
	F151-157 (replaces F151-F151,1)	We have revised the process for requesting an increase to your loans facility, and introduced limits to the amount you can apply for.
	F158 (previously F151.2)	We have confirmed that if you are requesting a loans bursary for the first time, or an increase to your existing loans bursary, you must explain why you need it.
	F159 – (previously F152)	We have added additional criteria (in the final two bullet points) that we will use to assess requests for increases in loans facilities.
	F160-161 (replaces F153)	We have clarified that we will acknowledge requests for increases to loans facilities within two working days, and we have introduced a new timescale for notifying you of our decision.
Annex 2, Diagram 1		We have updated the Annex to reflect the changes to the process for requesting an increase to your loans facility.

Introduction and purpose of the document

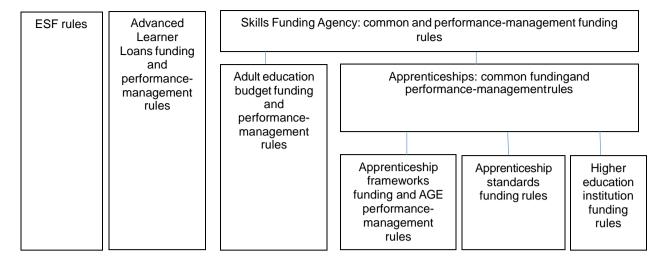
- F1. This document sets out the Advanced Learner Loans (loans) funding rules for the 2016 to 2017 funding year (1 August 2016 to 31 July 2017). The rules apply to all providers of education and training who hold a loans facility and loans bursary fund agreement with the Secretary of State for Education acting through the Skills Funding Agency (SFA). This agreement allows providers to receive loans payments from the Student Loans Company (SLC) on behalf of learners and loans bursary payments from the SFA.
- F2. The SFA may make changes to these rules. We will publish and highlight any changes through <u>Update</u>.
- F3. You must comply with the terms and conditions of the loans facility and loans bursary fund agreement, these funding rules and the Individualised Learner Record (ILR) Specification.
- F4. If you do not, you are in breach of the loans facility and loans bursary fund agreement with the SFA.

Understanding the terminology

- F5. The term 'we' refers to the SFA.
- F6. When we refer to 'you' or 'providers', this includes colleges, training organisations, local authorities and employers who receive funding through a loans facility or loans bursary fund agreement, to deliver education and training. We will use the individual type of provider if the requirements apply only to that type of provider.
- F7. The term 'funding agreement' means the loans facility and loans bursary fund agreement.
- F8. We use the terms 'learner' to cover all those who fund their education or training with a loan, and where appropriate, those learners who receive support through the loans bursary fund.

How the documents are structured

F9. This document forms one of a suite of documents which set out the funding rules for 2016 to 2017. You should read this document together with the other relevant documents in the suite as shown in the diagram below.



F10. We give a summary of the levels of government contributions towards skills provision, excluding apprenticeships, in the tablebelow.

Provision	19-23 year-olds	24+ Unemployed	24+ Other
English and Maths up to and including Level 2	Fully funded*	Fully funded*	Fully funded*
Level 2	Fully-funded* (first and full)	Fully funded	Co-funded
Learning to progress to Level 2	Fully funded	Fully funded	Co-funded
Level 3	Fully funded* (first and full)	Loan-funded	Loan-funded
	Loan- funded**/*** (previously achieved full Level 3 or above)		
Levels 4, 5 and 6	Loan-funded***	Loan-funded***	Loan-funded***
Traineeship#	Fully funded (including 24 year-olds)	N/A	N/A
English for Speakers of Other	Co-funded	Fully funded	Co-funded
Languages (ESOL) learning up to and including Level 2	Fully funded - unemployed		
Learning aims up to and including Level 2, where the learner has already achieved at Level 2 or above	Co-funded	Fully funded	Co-funded
admicved at Edvar 2 of above	Fully funded - unemployed		

^{*}Must be delivered as one of the qualifications required for the legal entitlement.

^{**} The availability of loans at Level 3 does not replace the legal entitlement to full funding for learners undertaking their first full Level 3.

^{***}Qualifications designated for loans, please see paragraphs F34 and F35.

^{*}Excludes flexible element where funding depends on age and level

- F11. This document contains all of the rules relevant to provision funded through loans and the loans bursary fund.
- F12. You should refer to the adult education budget (AEB) funding rules 2016 to 2017 for information about the circumstances under which learners aged 19 and older, including those studying at level 3, may be eligible for direct funding from us.

Contacting us

F13. If you need to contact us you can do so through our Service Desk at servicedesk@sfa.bis.gov.uk or telephone 0370 2670001.

Advanced Learner Loans

Advanced Learner Loans (loans) help people aged 19 and over undertake vocational, technical and professional qualifications at Levels 3, 4, 5 and 6. Loans provide a source of fees support for learners, enabling them to reap the personal and financial benefits of their study, which in turn will support the economy.

Learner eligibility for loans

- F14. Loans are not means-tested and are available to eligible learners (see paragraph F16.2) who are:
 - F14.1. aged 19 or older on the first day of their learning aim
 - F14.2. studying in England, with a provider in receipt of a loan facility from us (see paragraphs F18 and 19)
 - F14.3. studying one or more approved learning aims at Levels 3, 4, 5, or 6 (see paragraphs F42 to F44)
- F15. Offenders must also:
 - F15.1. have the right to stay in the UK after completing their sentence
 - F15.2. not be subject to a deportation order
 - F15.3. have been sentenced and not be on remand
 - F15.4. have their prison governor's approval to study the learning aim the loan will fund

F15.5. be studying their learning aim with a provider in England who has a loans facility from us and be within six years of their release date

F16. For 19 to 23 year olds:

- F16.1. the availability of loans at Level 3 does not replace the legal entitlement to full funding for learners undertaking their first full Level 3. You can find the definition of a full Level 3 in the Glossary.
- F16.2. you must check their legal entitlement before providing information on loans and if they have not used their legal entitlement to full funding for a first full Level 3, you must make them aware of that entitlement. If you are unable to offer a fully-funded first full Level 3 yourself, through your AEB funding agreement, if you have one, you must signpost the learner to the National Careers Service to obtain information about alternative providers.
- F16.3. who have achieved a Level 3 qualification, that was at the time they started or still is classed as a full level 3, and wants to enrol on any subsequent Level 3 qualification, of any size, they will have to either apply for a loan or pay for their own learning. Please contact qualifications@sfa.bis.gov.uk if you need advice on a previous qualification's designation.
- F16.4. where you have an AEB funding agreement with us to deliver a first full Level 3 qualification, a learner must not access a loan for the same qualification delivered at the same time. Should this situation occur, you must withdraw the learner through the SLC's learner provider portal to remove the fee liability for the loan. The SLC will then recover the overpayment from you from future loans payments due.
- F17. On receipt of learners' loan applications, the SLC is responsible for assessing whether a learner is eligible. You can find more <u>information on eligibility</u> on GOV.UK.

Provider eligibility to receive loans payments from the SLC, on behalf of learners

- F18. You can receive loan payments from SLC on behalf of learners if we have given you a loans facility, and learners have applied for loans which have been approved by the SLC. You must not complete a loan application form on behalf of a learner, or influence a learner's decision on whether to apply for a loan.
- F19. To retain your eligibility for a loans facility you must successfully complete the Register of Training Organisations (the Register) refresh and update your information when we ask you to. If you fail or do not update when we ask you to, you must apply at the next opening. During this period you and any subcontractors will not:
 - F19.1. be listed on the Register
 - F19.2. be invited to tender, and
 - F19.3. be able to increase the value of your loans facility
- F20. If your organisation does not apply at the next opening of the Register, or you fail the application process, we will review your eligibility for a loans facility.
- F21. We will not allow the subcontracting of provision which learners fund with loans from the start of the 2017 to 2018 funding year. Subcontracting is defined in the Glossary.
- F22. If you only hold a loans facility agreement with us (and do not have a direct funding agreement for any other funding stream) in 2016 to 2017, you must not subcontract the delivery of provision funded with loans.
- F23. If you hold a direct funding agreement with us for the adult education budget (AEB) and/or apprenticeships and did not subcontract the delivery of provision funded with loans in 2015 to 2016, you must not subcontract the delivery of provision funded with loans in 2016 to 2017.
- F24. If you hold a direct funding agreement with the SFA for AEB and/or apprenticeships and were in a subcontracting relationship for the delivery of provision funded with loans in 2015 to 2016 please note the following.
 - F24.1. You can continue to subcontract loans funded learning aims in the 2016 to 2017 funding year with those organisations where you had a loans subcontracting arrangements in place for the 2015 to 2016 funding year, subject to paragraph F24.4below.
 - F24.2. You must not enter any new loans subcontracts with organisations you did not have a loans subcontract with, in 2015 to 2016.

- F24.3. Delivery of all loans-funded subcontracted learning aims for learners who started before 1 August 2016 can continue until the learning aims are complete, including where these continue beyond 31 July 2017.
- F24.4. Subject to paragraph F24.3, you must ensure all other subcontracted loans-funded learning aims are completed by 31 July 2017, unless we have given you exceptional permission to extend beyond this date. If this applies, you must retain evidence in the learners' files of our decision, which will usually be in the form of an email from us.
- F24.5. You must comply with the rules on subcontracting as set out in the Skills Funding Agency: common funding rules 2016 to 2017. You remain responsible to the learner for the delivery of the provision and will be liable to make any repayment of fees in the event that the subcontractor fails to deliver the provision as agreed with the learner. All of a subcontractor's learners are ultimately the responsibility of the lead provider.
- F25. You must not deliver loans-funded provision outside England unless we give you permission before learning starts. This applies to learning delivered on your or an employer's premises, and to distance learning or learning where a variety of methods and locations are used.
- F26. You must record the 'Delivery location postcode' field in the ILR as in England. Where we agree that a learning aim may be delivered elsewhere, you must first get authorisation from us. You must keep this authorisation in the learner file for the learner. This will usually be an email from us.

Loan amounts and financial contributions

- F27. You must advise all learners of your fees and charging policy in advance of their decision to apply for a loan.
- F28. A learner will only be eligible to apply for a loan that is either equal to, or less than:
 - F28.1. the maximum loan amount in the learning aims section of the <u>Hub</u> for the qualification(s) they are undertaking or
 - F28.2. your fee, as shown in your learning and funding information letter and provided to the SLC as part of the learner's loan application (see paragraph F49 for further details)
 - F28.3. the minimum loan value a learner can apply for is £300
- F29. We do not expect that you would need to charge more than the maximum loan amount as shown on the Hub. For information about how the maximum amount of the loan is set, please refer to the Advanced Learner Loans: Maximum Loan Amounts for Designated Qualifications 2016 to 2017.

- F30. Learners can only apply for loans to cover the tuition fee element of their provision, including all costs and charges for items without which alearner cannot complete their course.
- F31. You can pass on membership fees, made by professional bodies, to the learner. You can charge these as a requirement of enrolling if this is needed to achieve the learning aim.
- F32. You can ask a learner funded by a loan to pay directly for extra activities not essential to the learning, such as trips and visits. You must not make it a condition that the learner takes up the optional extra provision to complete or achieve their learning aim.
- F33. If a learner funds their provision with a loan and needs a Disclosure and Barring Service (DBS) check to take part in learning, you cannot charge them for this. If the learning is associated with the learner's employment, their employer is responsible for carrying out and paying for this check.

Qualifications designated for loans

- F34. The Secretary of State for Education is responsible for designating the further education qualifications eligible to be funded with loans. The SFA provides operational support to the Secretary of State in relation to designation. The criteria for designation are set out in the Advanced Learner Loans Prospectus 2015 to 2016 and 2016 to 2017: Designating Qualifications and includes the following types of provision.
 - F34.1. A-levels and AS-levels (up to a maximum of four full A-levels) (see paragraphs F43 to F45).
 - F34.2. Quality Assurance Agency (QAA) Access to Higher Education Diplomas.
 - F34.3. Vocational qualifications including technical and professional qualifications at Levels 3, 4, 5 and 6.
- F35. For the specific details on learning aims that are eligible to be funded through a loan, please refer to the learning aims section of the Hub or the Advanced Learner Loans Qualifications Catalogue.
- F36. You must check that the learning aim is valid for new starts on the date that the learner is due to start.
- F37. Loans cannot be used to fund components of qualifications.
- F38. You must make sure that you provide accurate unique learner number (ULN) information to awarding organisations and that all information you use to register learners for qualifications is correct (you can find more information on the learning records service section of GOV.UK).

F39. Where a learner takes out a loan for the Access to HE Diploma, completes it and progresses to, and completes a Student Finance England funded HE course, the balance relating to the loan for the Access to HE Diploma will be written off

Number of loans

- F40. Learners are entitled to access up to four loans, which they can take out either one after the other or at the same time.
- F41. Learners will need to apply for a loan for each learning aim.
- F42. Within the entitlement of four loans, a learner is entitled to apply for:
 - F42.1. no more than one loan to complete an Access to HE Diploma
 - F42.2. up to eight loans to undertake up to a maximum of four full A-levels; this will be treated as one single loan entitlement. See paragraphs F43 to F44
 - F42.3. no more than four loans to undertake vocational qualifications including technical and professional qualifications at Levels 3, 4, 5 and 6
- F43. A learner can study a full A-level by enrolling on an A-level learning aim or enrolling on an AS-level learning aim and then progressing to an A-level learning aim.
 - F43.1. Where a learner intends to study towards, and sit only an A-level exam, they can apply for up to four loans for four A-level learning aims. They can make these applications at the same time or one after the other.
 - F43.2. Where a learner intends to study towards, and sit an AS-level exam, not followed by an A-level exam, a learner can apply for up to four loans for four AS-level learning aims.
 - F43.3. Where a learner intends to study towards, and sit an AS-level exam, and chooses to follow this with an A-level exam, a learner can apply for up to four loans for four AS-level learning aims and up to four loans for the corresponding A-levels. In this scenario providers must reduce the fee charged to the learner for the A-level(s) to take account of the prior study of AS-levels, thereby reducing the amount of loan a learner would have to take out. The total fee for the AS-level and A-level must not exceed the maximum loan amount for the A-level.
- F44. If a learner enrols on a combination of A-level and AS-level learning aims, they will be able to apply for loans to undertake up to four full A-levels, subject to the overall limits for each learning aim type, outlined above.

F45. You can access further information, including illustrative examples, in Section 16 (Recording A and AS-levels) of our ILR <u>Provider Support Manual 2016 to 2017.</u>

Recognition of prior learning

- F46. A learner could have prior learning that has been previously accredited by an awarding organisation or could be formally recognised and count towards a qualification. If this is the case you must:
 - F46.1. reduce the fee charged to the learner for the learning aim by the percentage of learning and assessment that the learner does not need
 - F46.2. follow the policies and procedures set by the awarding organisation for the delivery and assessment of the qualification
 - F46.3. not require a learner to take out a loan if the prior learning meets the full requirements of the awarding organisation to achieve the learning aim or where a learner only resits a learning aim assessment or examination and no extra learning takes place
- F47. Where a learner undertakes a Subsidiary Diploma and progresses to an Extended Diploma at the same level, the progression can be considered as a single loan and the loan amount amended through the change of circumstance (change of learning aim) process (please see paragraphs F60 and F61).
 - F47.1. The change must be reported while the learner is still in learning on the Subsidiary Diploma.
 - F47.2. You must issue another learning and funding information letter (please see paragraph F49 for more information).
 - F47.3. The learner must make a new loan request to cover the fee for the Extended Diploma.
- F48. Where a learner has already undertaken a Subsidiary Diploma funded with a loan and then wishes to undertake an Extended Diploma at the same level and in the same subject at a later date, they can apply for another loan for the Extended Diploma within their overall entitlement to four loans. In this scenario providers must reduce the fee charged to the learner for the Extended Diploma to take account of the prior study of the Subsidiary Diploma.

Information needed

The SLC will assess a learner's loan application against the eligibility criteria and where they approve it, make loan payments to you on behalf of learners. The SLC will give you access to their <u>learning provider portal</u> (an interactive webbased service that will act as the main channel of communication between you and the SLC). You must use the portal to confirm learner attendance and release loan payments.

- F49. If the learner decides to apply for a loan, you must give them information in the <u>learning and funding information letter</u>. This letter must provide the learner with the information they need to complete their loan application. The letter must include:
 - F49.1. all of the standard text as set out in the template letter
 - F49.2. the UK provider reference number (UKPRN)
 - F49.3. the learning aim reference number
 - F49.4. the title of the learning aim
 - F49.5. the learning aim start date and planned end date
 - F49.6. the fee charged to the learner and
 - F49.7. the maximum amount of loan available for the learning aim as published on the learning aims section of the Hub
- F50. There is a separate learning and funding information letter for offenders. Offenders will make loan applications on the <u>standard paper-based loan application form</u>, which you can download from GOV.UK. The application must be accompanied by an SLC Prisoner Application Proforma (available from the Head of Learning, Skills and Employment within the prison) or a letter from the prison governor (or their representative).
- F51. The proforma or governor's letter must confirm information such as the offender's release date and permission for the offender to study. If the offender does not have the required evidence of their identity (such as a passport or birth certificate), the proforma or the governor's letter must also confirm the offender's identity.
- F52. You must have evidence of an initial completed learning and funding information letter for each learner, and, if applicable, an updated learning and funding information letter when there is a change to a learner's learning aimor fees.

You will be able to see the status of the learner's loan application using the SLC's learning provider portal.

F53. You must provide the SLC with the information they need to administer loans in line with a formal service agreement being developed by the SLC.

- F54. Once the learner's loan application has been approved and the learner has started the learning aim (please see paragraph F125) you must confirm the learner's attendance to the SLC through the learning provider portal.
- F55. You can only confirm that the learner has started once the learner has been attending for at least two weeks. Learners become liable for their loan two weeks after their start date; this is referred to as the 'initial liability point' and will either be:
 - F55.1. two weeks from the learning aim's start date, as shown on the loan application form or
 - F55.2. two weeks after the learner started their studies; if they started at a later date than the one given on the loan application form (in this case you must tell the SLC about the change to the start date through the learning provider portal before you confirm the learner's attendance please refer to the SLC's Learning Provider Portal User Guide)
- F56. You must accurately record the learner's unique learner number (ULN) in the learning provider portal before you can confirm their attendance.
- F57. If a learner leaves their learning aim before the initial liability point, or if a learner has never attended, you must confirm this to the SLC.
- F58. Once a learner has passed the initial liability point, you must confirm attendance to the SLC using the learning provider portal on: 1 November, 1 February, 1 May and 1 August.

If the learner's circumstances change

- F59. If a learner's details or circumstances change, you must tell the SLC as soon as you are aware, as this will reduce the risk of a learner becoming legally responsible for a loan for a learning aim they are no longer studying. Learners also have a responsibility to keep the SLC informed of changes to their circumstances.
- F60. The following reasons may result in a learner's details or circumstances changing from the information they supplied in their initial application.
 - F60.1. A change in personal details.
 - F60.2. A change in provider.
 - F60.3. A change of learning aim.
 - F60.4. A change of loan amount or the fee you charge. (Please refer to paragraph F63.)
 - F60.5. Cancellation of an application.

- F60.6. Withdrawal from the learning aim.
- F60.7. Taking a break from learning or suspending or resuming learning.
- F61. Only a learner can make a request to the SLC to change their personal details or to request an increase in their loan amount.
- F62. If you cancel a learner's loan, you must only reinstate it with the learner's written permission.
- F63. If the details or fees for the learning aim change, you must provide the learner with another learning and funding information letter in advance of the change being implemented.
- F64. If a learner changes provider during the learning aim they must tell the SLC and the learner must be marked as a withdrawal from you. The learner will then need to reapply to the SLC for a loan to continue their studies at the new provider.
- F65. You can find detailed information and guidance on managing changes of circumstance on the SLC's Learning Provider Services website.

If the learner's circumstances change: offenders

F66. Undertaking learning in custody is likely to lead to more frequent changes in circumstances. The provider must tell the SLC when an offender's circumstances change (for example, if they are released from prison, transfer to another prison or change or withdraw from their learning aim).

If an existing learner is sent to prison

F67. If an individual undertaking an eligible learning aim financed through a loan is sent to prison, they may be able to continue their studies while they are in custody. The individual will have to meet the eligibility criteria for offenders as set out in paragraph F15 above, including the prison governor's confirmation that the learning aim is appropriate.

Changes in circumstances that affect eligibility for a loan

- F68. When the prison governor decides that an offender's eligibility for a loan has changed (for example, if a further conviction makes the learning aim inappropriate), or the offender's release date is extended beyond the maximum time period:
 - F68.1. the offender must be withdrawn from their learning aim
 - F68.2. the prison governor should tell the provider and

- F68.3. the provider should tell the SLC through the learning provider portal
- F69. The offender will still be liable for repaying loan payments made before the withdrawal.

Transfers between prisons

Guidance to prison governors advises them to avoid transferring offenders in loanfunded learning where possible. The section below describes what happens when this is not possible.

- F70. There are times when an offender will be transferred between prisons in England. If the same provider operates in both prisons, the transfer will be treated as a 'Change to personal details' change of circumstance. The offender must tell the SLC about the change.
- F71. If the prisons have different providers:
 - F71.1. the transfer will be treated as a withdrawal from the learning aim, using the process for those with compelling personal reasons
 - F71.2. the provider must tell the SLC about the withdrawal through the Learning Provider Portal
 - F71.3. the offender must make a new loan application if the provider in the prison the offender is transferred to can offer a comparable learning aim
- F72. The prison governor at the receiving prison will need to confirm the offender's eligibility for a loan.
- F73. The provider in the prison the offender is transferred to must take account of the offender's prior attainment when setting the fee for the rest of the course.
- F74. The two providers must work together to provide continuity of the offender's learning programme.
- F75. If there is no comparable course offered by the provider in the receiving prison, the offender withdraws from their loan and remains liable for loan payments made in respect of attendance on the course at the original prison. The offender may subsequently (for example on release) be able to apply for a further loan (under compelling personal circumstances) to complete the original course.

- F76. If an offender with a loan transfers from an English prison to a prison inWales, they must leave their loans-funded learning aim, using the process for those with compelling personal reasons.
- F77. Before the transfer, the prison governor should tell the provider, who must then tell the SLC through the Learning Provider Portal. If there is a comparable learning aim available in the prison in Wales, the offender may be able to complete the remainder of the learning aim (education remains publicly funded in Wales).
- F78. The offender will still be liable for repaying loan payments made to the provider in England up to the point they leave their learning aim.
- F79. If an offender who has already started a loans-eligible learning aim transfers from a prison in Wales to an English prison, they will need to apply for a loan if they want to continue their studies. The provider should take account of the prior learning when setting the fee for the learning aim the loan will fund.

The period leading up to an offender being released, and the release itself

- F80. An offender may be released on temporary licence to commence learning aims at Levels 3 to 6 with a provider with a loans facility from us. The intention is likely to be that this learning will continue post-release.
 - F80.1. The offender must still meet the additional eligibility criteria set out in paragraph F15 with the loan application made in the same way as those from offenders in custody and accompanied by an SLC Prisoner Application Proforma or a letter from the prison governor (or their representative) to confirm the information, such as the offender's release date and their permission for the offender to study.
- F81. An offender who started a loan-funded learning aim in custody and is released on temporary licence should be able to continue their studies with a provider with a loans facility from us. If this involves a change of provider:
- F82. The offender must withdraw from their loan-funded learning aim in custody, using the process for those with compelling personal reasons and apply for another loan for their study with the new provider.
 - F82.1. the prison governor should tell the provider about the withdrawal
 - F82.2. the provider must then tell the SLC through the learning provider portal and
 - F82.3. the new provider should take account of the learning the offender completed in custody when setting the fee for the rest of the learning aim

- F83. An offender who started a loan-funded learning aim towards the end of their sentence, should be able to continue their studies with an eligible provider who has a loans facility from us on release. If this involves changing provider:
 - F83.1. the offender should withdraw from the learning aim, using the process for those with compelling personal reasons, and apply for another loan with their new provider
 - F83.2. the prison governor should tell the provider about the withdrawal and the provider must tell the SLC about the withdrawal using the learning provider portal and
 - F83.3. the new provider should take account of the learning the offender completed in custody when setting the fee for the rest of the learning aim

Retrospective applications and changes

- F84. A learner can apply for a loan retrospectively (after the initial liability point but must be while they are still undertaking the learning aim). If the loan is approved by the SLC and the learner has already paid fees to you, then you must refund the full amount to the learner to avoid double funding.
- F85. You, or the learner will be able to raise a change of circumstance retrospectively. This must be raised while the learner is undertaking their learning aim.

Advanced Learner Loans Bursary Fund

We provide a loans bursary fund to help vulnerable and disadvantaged learners who are funding their learning with a loan, such as those with learning difficulties or disabilities, and parents who need help with childcare.

The fund is not an entitlement, and you must decide how it will be distributed.

- F86. The loans bursary fund provides funding for the following.
 - F86.1. Learner support funding for hardship, childcare and residential support. This excludes learner support for learners in custody or released on temporary licence.
 - F86.2. Learning support activity for 'in-learning' support, such as support for teaching assistants or reasonable adjustments under the Equality Act 2010. This includes learning support activity for learners in custody or released on temporary licence.

- F86.3. Your area costs, if applicable, which reflect the higher cost of delivering provision in some parts of the country, such as London and the south east.
- F87. You must make sure that you keep sufficient funding to provide the support we refer to in paragraph F86.2.

F88. You must:

- F88.1. prioritise vulnerable groups and disadvantaged learners
- F88.2. consider the most appropriate learner support fund to draw from where a learner is receiving AEB funding from us as well as through a loan
- F88.3. use your loans bursary fund only for learners who have had a loan approved by the SLC, and who have an assessed need
- F89. When you are making decisions about awarding loans bursary funding, you must take into account the availability of other financial support for learners. You must make it clear to learners that it is their responsibility to tell the Department for Work and Pensions about any learner support that they are receiving from you, as the learner support payment may affect their eligibility for some benefits.
- F90. If you are funded through a grant, you can claim up to 5% of your loans bursary expenditure for learner support on administration costs. Your administration costs must not be more than 5% of the value of your Loans Bursary allocation.

F91. You must not:

- F91.1. use loans bursary funding to cover costs and charges for items without which a learner could not complete their course, as these must be charged in the course fee
- F91.2. transfer funding between your loans bursary and your adult education budgets
- F91.3. use loans bursary funding for learner support for learners in custody or released on temporary licence.

Learner support

Hardship

F92. You can support learners based on their needs and local circumstances. Types of support include the following.

- F92.1. Course-related costs, including course trips, books and equipment (where these costs are not included in the tuition fee), support with domestic emergencies and emergency accommodation.
- F92.2. Transport costs.
- F92.3. Examination fees.
- F92.4. Accreditation fees, professional membership fees and any fees or charges due to external bodies.
- F92.5. Your registration fees.
- F92.6. Support provided by others, or by providing items or services or cash direct to the learner. This can be in the form of a grant or repayable loan provided by you.

20+ childcare

- F93. You can only use childcare funding to pay for childcare with a childminder, provider or childminder agency who is registered with Ofsted.
- F94. For learners aged under 20 on the first day of learning you must direct them to the Education Funding Agency (EFA) 'Care to Learn' programme. The Bursary must not be used to top up childcare payments for those receiving 'care to learn'.
- F95. You must not use childcare funding:
 - F95.1. to fund informal childcare, such as that provided by a relative
 - F95.2. to set up childcare places or to make a financial contribution to the costs of a crèche

Residential support

F96. We provide residential funding to support learners receiving specialist provision which involves a residential element or to support learners who cannot access provision locally. The fund can help learners in private accommodation or in accommodation you own or manage.

F97. You must:

- F97.1. set out the criteria and procedures for considering and agreeing applications for support from your Loans Bursary Residential funds
- F97.2. give priority to learners who need accommodation and only pay for travel costs in exceptional circumstances

Learning support

- F98. Learning support must not be used to deal with everyday difficulties that are not directly associated with a learner's learning on their programme.
- F99. You must:
 - F99.1. carry out a thorough assessment to identify the support the learner needs
 - F99.2. agree and record the outcome of your assessment in the learner file
 - F99.3. record all outcomes on the learner file and keep all evidence of the assessment of the needs, planned and actual delivery
- F100. You may claim learning support if learning continues past the planned end date and the learner still needs support.

Area costs

- F101. If a learner funded through a loan attracts area cost uplift funding, this will be calculated automatically based on information in the ILR about where the learning takes place (as reported in the 'Delivery location postcode' field).
- F102. The total area cost uplift is equally spread across the planned length of the aim recorded on the ILR.
- F103. We detail area cost uplifts by region in Annex 1.

Exceptional Learning Support claims above £19,000

Learners who need significant levels of support to start or continue learning can get access to Exceptional Learning Support if their support costs more than £19,000.

Learners aged 19 to 24 requiring significant levels of support would normally be expected to have an Education, Health and Care Plan (EHC plan) provided by their local authority and therefore would access funding from their local authority.

F104. If a learner has support costs of more than £19,000 in any one funding year, you can access Exceptional Learning Support. You can find details of how to claim in the exceptional learning support costs form.

F105. To claim Exceptional Learning Support for a learner aged 19 to 24 who does not have an EHC plan, you must confirm why the learner does not have an EHC plan.

Loans bursary funding rates

- F106. If you are funded through a contract or a loan facility conditions agreement, you can claim loans bursary funding at three different monthly rates:
 - F106.1. Rate 1 (£50) low-cost learner support, not including childcare and residential
 - F106.2. Rate 2 (£150) learning support recognising that the learner could have learner support needs as well
 - F106.3. Rate 3 (£250) residential or childcare support recognising that the learner could have other learning support or learner support needs as well
- F107. You can only claim one rate for each learner each month, but you can claim a different rate each month to reflect the needs of the learner being supported.
- F108. If you are funded through a grant you must only claim rate 2 (£150) for learners needing learning support; you must claim the actual cash value for learner support (hardship, childcare, residential).
- F109. If you plan to deliver the learning aim in less than one month and the learner is receiving learning support, you must claim the full value of the learning support through the Earnings Adjustment Statement (EAS).
- F110. We expect the total you claim using the fixed rates, to cover the costs of supporting that learner. If the cost of providing support to a learner goes above the total earned from the fixed monthly rate, you can claim the excess through the EAS. (You must have evidence to support the excess claim.)

Provision of evidence: Advanced Learner Loans and Loans Bursary Fund

F111. You must hold evidence to assure us that you have delivered education and training which learners have chosen to fund through loans, in line with our loan facility and bursary fund agreement and the funding rules. Most evidence will occur naturally from your normal businessprocess.

F112. As part of our financial assurance work, we will continue to monitor compliance with the funding rules. We will contact you where we identify you have submitted data that does not meet our funding rules. We will require you to correct inaccurate ILR data, data reported to the SLC through the Learning Provider Portal and earning adjustment statement (EAS) data associated with the loans bursary.

Learner file (previously called Learning Agreement)

- F113. All learners who chose to fund their education and training with a loan must have a learner file.
- F114. The learner file must contain the evidence needed to support the loans payments you will receive on behalf of a learner from the SLC, and must be available to us if required.
- F115. You and the learner must confirm that the information in the learner file is correct and, therefore, the information you have reported to the SLC through the Learning Provider Portal and to us in the ILR is correct.
- F116. If the time spent in learning is short, the level of evidence in the learner file would reflect this.
- F117. Where you hold information centrally, you only need to refer to the source.
- F118. The learner file must confirm the following.
 - F118.1. All information reported to us in the ILR and the Earnings Adjustment Statement, and if it applies, the supporting evidence of the data being reported.
 - F118.2. Information on prior learning that affects the learning or the fee that you charge the learner for the learningaims.
 - F118.3. A description of how you will deliver the learning and skills and how the learner will achieve.
 - F118.4. The fee you are charging and details of any learner or employer contribution.
 - F118.5. Support needs identified including how you will meet these needs and the evidence of that.
- F119. All records and evidence of achievement of learning aims. This must be available within three months of you reporting it in the ILR.
- F120. You must hold evidence:
 - F120.1. that the learner exists

- F120.2. that the learning activity which the learner is funding with a loan is taking place or has taken place
- F120.3. that the achievement of learning aims is certified (that is, a certificate has been issued by an awarding organisation or held in the Personal Learning Record), and
- F120.4. of why other funding has been claimed, such as learning support and learner support through the loans bursary fund
- F121. You must have evidence to show the learning is taking or has taken place and that the learner was not just certificated for prior knowledge. This will depend on the methods you use and could include registers, reviews, online software and so on. Attendance at a location, such as a classroom or training centre, is not sufficient on its own to evidence learning has taken place.

Confirmation and signatures

- F122. The learner must confirm the information is correct when it is collected. You must have evidence of this, which can include electronic formats.
- F123. We accept electronic evidence, including digital systems but you must have wider systems and processes in place to assure you that learners exist and are eligible for funding.
- F124. You must keep effective and reliable evidence. You are responsible for making the evidence you hold easily available to us when we need it.

Starting, participating and achieving

- F125. The start date for a learning aim is when activity directly related to the learning aim has begun. We do not consider enrolment, induction, prior assessment, diagnostic testing or similar activity as the start of learning.
- F126. You must apply for, and give to learners, the certificates that awarding organisations issue for achieving a learning aim. You must evidence in the learner file that you have done this.

Recording data on the Individualised Learner Record (ILR)

F127. You must accurately complete all ILR fields for loans-funded learners as required in the ILR Specification even if they are not used for funding. Where your data does not support the funding you have received from the SLC or claimed from the loans bursary, we will take action to get this corrected and could recover funds or require you to make repayments to the SLC.

F128. You must make sure that data reported on the ILR matches the information you have filled in on the SLC's learning provider portal.

Self-declarations by learners

- F129. All learner self-declarations must confirm the learner's details and describe what the learner is confirming.
- F130. If a learner self-declares prior attainment, you must check this in the PLR and challenge any contradictory information with the learner. The PLR will not necessarily override the learner's self-declaration.

Performance-management

General principles

- F131. There is a performance-management timeline for 2016 to 2017 at Diagram 1 of Annex A of Skills Funding Agency common funding and performance-management rules.
- F132. We have no responsibility to allow you to receive loans payments from the SLC for any amount over your loans facility value or to pay any amount over your loans bursary funding allocation for the funding year or financial year, as set out in your loans facility agreement. If you exceed your loans facility without our permission, we will instruct the SLC to stop processing your loan applications with immediate effect.
- F133. We will use our approach to funding to make sure learning provision is of a high quality. We will use your track record to assess your ability to deliver education and training to the required standard. Your track record will include Ofsted grades, minimum standards of performance, financial management and control, and your previous delivery against your contract.
- F134. As part of our financial assurance work, we will continue to monitor compliance with the funding rules. We will contact you where we identify you have submitted data that does not meet our funding rules. We will require you to correct inaccurate ILR and EAS data or to adjust your final funding claim.
- F135. We will take your performance into account when agreeing your loan facility or loan bursary allocation for 2017 to 2018. We may adjust your 2017 to 2018 facility and bursary:
 - F135.1. loan facility to reflect the value of approved loans held by the SLC
 - F135.2. loan bursary allocation to reflect your final funding claim or final ILR and EAS data for 2016 to 2017

Advanced Learner Loan facility

- F136. You will receive payments from the SLC based on information you provide through their Learning Provider Portal about the learners who pay for their learning with you in part or in full with a loan.
- F137. To manage the loans budget we will use information from the SLC on loans commitments (approved loans). Your loan facility is the total funding that you can claim for loans-funded learners. If your delivery is likely to exceed your facility, you must request an increase.
- F138. We will review your performance in December 2016 and in April 2017. We will only reduce your loan facility during the year if there is a risk that the demand for loans may exceed the national budget. We will focus first on providers that have delivered small values of loans-funded activity and we will contact you if we need to reduce your loan facility.

Advanced Learner Loan Bursary Allocation

All providers

F139. You must only use your loan bursary allocation to support learners funded through a loan.

Providers funded through a grant

- F140. You will receive your loan bursary funding allocation in three stages (that is, you will receive 'profile' payments).
 - F140.1. 50% in August
 - F140.2. 25% in January
 - F140.3. 25% in April
- F141. You must provide the following two funding claims, giving details of the amount of loan bursary funding you have used.
 - F141.1. The mid-year funding claim (February 2017), including a forecast of your spending for the rest of the year.
 - F141.2. The final funding claim (October 2017).
- F142. You must make your funding claims in line with the <u>Funding Claims 2016 to 2017 Guide</u>. We will publish this in autumn 2016 and it will contain more information on the claim process, evidence we need and audit.

- F143. At the end of the year we will compare the amount of loan bursary funding you have used with your loan bursary allocation.
- F144. We will not apply an automatic payment when you have spent more than your loan bursary allocation. You must pay back any loan bursary funding you have not spent. We will confirm that value of funding you must pay back in your reconciliation statement.
- F145. We will use information from the latest validated ILR and EAS data you provide to review your actual spend on learner support, learning support and area cost uplift for learners funded through aloan.
- F146. If we have evidence you have not completed your ILR data correctly, we may reduce your loan bursary allocation.

Providers funded through a contract or loans facility conditions agreement

- F147. We will pay you each month for eligible learners up to your contract value for the financial year. We will calculate the value of funding using the latest validated ILR and EAS data you provide.
- F148. We will review your performance in December 2016 and in April 2017. We will contact you if we need to reduce your loan bursary allocation. We will focus first on providers that have used small values of their loan bursary allocation.

Requesting an increase to your Loan Facility or Loan bursary allocation with effect from 2 November 2016

- F149. You can ask for an increase to your loan facility or loan bursary allocation by sending an Advanced Learner Loans Facility: Change Request Form 2016
 to 2017
 to ALLfacilityrequests@sfa.bis.gov.uk. You must have used at least 75% of your 2016 to 2017 loans facility to be eligible for an increase. You can also use the form to request either a new loan bursary allocation for an existing loan facility or an increased loans bursary. The last date you can request these changes is 30 September 2017.
- F150. You can use the Advanced Learner Loans Facility: Change Request Form 2016 to 2017 to request a loan facility if you do not have one. You can request a loan bursary allocation at the same time if you need one. You must have an adult apprenticeship or AEB funding agreement with us. If you are applying for a loan facility for the first time, the maximum amount you can apply for in 2016 to 2017 is £250,000. The last date you can request a loan facility for the first time for 2016 to 2017 is 30 April 2017.
- F151. If you have a loans facility of up to £500,000 as at 2 November 2016, a

- maximum growth limit of £250,000 will apply for the remainder of the funding year.
- F152. If you have a loans facility of £500,000 or more as at 2 November 2016 a maximum growth limit of £750,000 or 50% of your initial 2016 to 2017 loan facility value (whichever is the lesser), will apply for the remainder of the funding year.
- F153. If you are requesting an increase of £250,000 or less, you will only need to complete part 1 of the <u>Advanced Learner Loans Facility: Change Request Form 2016 to 2017.</u>
- F154. If you are requesting an increase of more than £250,000, you will need to complete parts 1 and 2 of the <u>Advanced Learner Loans Facility: Change</u> Request Form 2016 to 2017.
- F155. In exceptional circumstances, you may request growth above the limits set out in paragraphs F151 and F152. You must complete parts 1 and 2 of the Advanced Learner Loans Facility: Change Request Form 2016 to 2017. We will assess these requests on a case by case basis.
- F156. For growth requests under paragraph F151, F152 and F155, we reserve the right to take into account growth awarded to you since 1 August 2016.
- F157. If you have not yet had an Ofsted inspection and/or you have not yet had your qualification achievement rates assessed against the SFA's Minimum Standards, your growth will be limited to £250,000 for the remainder of the funding year. Once you have had an Ofsted inspection and/or been assessed against Minimum Standards (whichever occurs the sooner), and the results are satisfactory, we will consider awarding growth above these limits.
- F158. If you are requesting a loans bursary for the first time, or an increase to your existing loans bursary you must explain why you need it. You must separately identify the number of learners and the funding required for area cost uplift, learner support and learning support and, if appropriate, explain why the learner's needs are different to previous years.
- F159. We will increase your existing loan facility or loan bursary allocation (or approve one for the first time) if funds are available and if:
 - you are listed on the <u>Register of Training Organisations</u> and have completed the capacity and capability questions successfully
 - o you have a good trackrecord
 - you are not under notice for Failure of Inspection, Financial Health or Financial Control
 - you are not under notice for Minimum Standards for classroom and workplace learning

- we are confident that awarding an increase to your loan facility is a good use of public funds
- the SLC confirm you are compliant with their service standards for managing learner attendance, withdrawals and changes of circumstances through the learning provider portal and you are making timely ILR returns.
- for growth requests over £250,000, you must demonstrate you have capacity and capability and quality assurance arrangements in place to successfully deliver the growth requested
- F160. We will acknowledge receipt of your request within two working days.
- F161. For requests we receive within four working days of month-end, we will notify you of the outcome by the 10th working day of the following month.
- F162. This process, set out in Diagram 1 in Annex 2, is open to you until:
 - F162.1. 30 April 2017 if you are requesting a loan facility for the first time; you can ask for a loan bursary allocation at the same time if you need one
 - F162.2. 30 September 2017 if you are requesting a change to an existing loan facility or if you are requesting a new or changed loan bursary allocation for an existing loan facility

Annex 1: Area cost uplifts by region

London A 1.20	London B 1.12
Camden	Barking and Dagenham
City of London	Bexley
Greenwich	Havering
Islington	Redbridge
Kensington and Chelsea	Barnet
Lambeth	Enfield
Southwark	Waltham Forest
Westminster	Bromley
Wandsworth	Croydon
Hackney	Kingston upon Thames
Tower Hamlets	Merton
Lewisham	Richmond upon Thames
Newham	Sutton
Haringey	Brent
Hammersmith and Fulham	Ealing
	Harrow
	Hounslow
	Hillingdon

Bedfordshire and Hertfordshire Non-fringe 1.03		
Central Bedfordshire	North Hertfordshire	Stevenage
Bedford	South Bedfordshire	Luton

Berkshire, Surrey and West Sussex Fringe 1.12		
Bracknell Forest	Runnymede	Reigate and Banstead
Crawley	Slough	Tandridge
Elmbridge	Spelthorne	Waverley
Epsom and Ewell	Surrey Heath	Windsor and Maidenhead
Guildford	Woking	Mole Valley

Berkshire Non-fringe 1.12		
Reading	Wokingham	West Berkshire

Buckinghamshire Non-fringe 1.07		
Aylesbury Vale	Milton Keynes	Wycombe

Hampshire and Isle of Wight 1.02		
Basingstoke and Deane	Hart	Rushmoor
East Hampshire	Havant	Southampton
Eastleigh	Isle of Wight	Test Valley
Fareham	New Forest	Winchester
Gosport	Portsmouth	

Cambridgeshire – 1.02		
Cambridge	Huntingdonshire	South Cambridgeshire
East Cambridgeshire	Peterborough	Fenland

Hertfordshire and Buckinghamshire Fringe 1.10		
Broxbourne	South Buckinghamshire	Watford
Chiltern	St Albans	Welwyn Hatfield
Dacorum	Three Rivers	East Hertfordshire
Hertsmere		

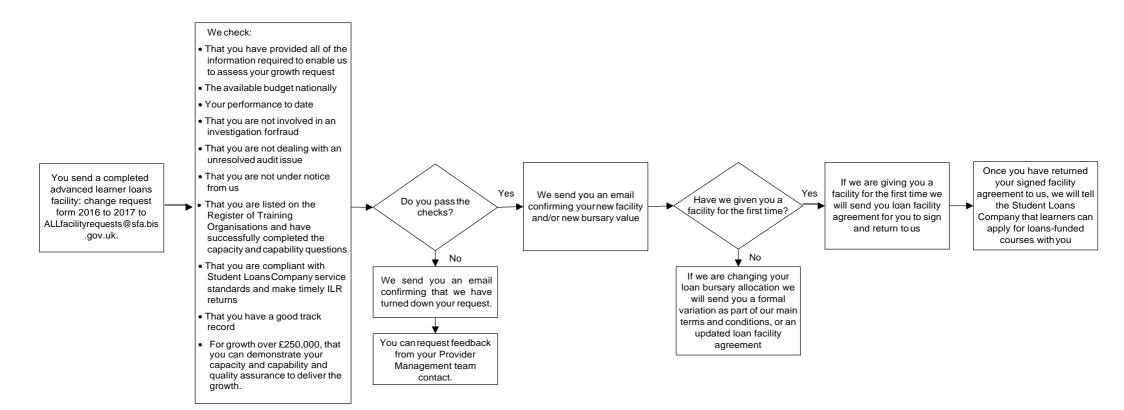
Kent and Essex Fringe 1.06		
Basildon	Harlow	Thurrock
Brentwood	Sevenoaks	Dartford
Epping Forest		

Oxfordshire 1.07		
Cherwell	Vale of White Horse	West Oxfordshire
Oxford	South Oxfordshire	

West Sussex Non-fringe 1.01		
Adur	Arun	Worthing
Chichester	Horsham	Mid-Sussex

Annex 2

Diagram 1. Process for requesting an increase to an advanced learner loan facility and loan bursary



Glossary

20+ Childcare	Within the Loans Bursary Fund a category of support to assist learners aged over the age of 20 who are at risk of not starting learning or leaving learning due to issues in obtaining childcare.
Area Cost Uplift	Area cost uplift is paid to eligible providers from the Loans Bursary Fund and reflects the higher cost of delivering provision in some parts of the country, such as London and the south east.
Break in Learning	When a learner is not continuing with their learning but has told you beforehand that they intend to resume their learning aim in the future.
Care to Learn	A Department for Education scheme to assist young parents under the age of 20 with their childcare costs that may form a barrier to them continuing in education.
Direct costs of learning	Any costs for items without which it would be impossible for the learner to complete their learning aim. This can include the costs of registration, examination or any other activities or materials without which the learner cannot achieve their programme of study.
Distance Learning	Learning delivered away from the learner's main place of employment or place of learning.
Earnings adjustment statement (EAS)	The form providers need to fill in to claim Loans Bursary funding that cannot be claimed through the Individualised Learner Record.
Exceptional Learning Support	Learning support when the needs of the learner are over £19,000 in a single year.
Full level 3	 A full Level 3 is the level of attainment which is demonstrated by: a General Certificate of Education at the advanced level in two subjects, or a General Certificate of Education at the advanced subsidiary (AS) level in four subjects, or

	a Quality Assurance Agency Access to Higher Education (HE) Diploma at Level 3, or
	 a Tech level; or Applied general qualification at Level 3 which meets the requirements for 2018 16 to 19 performance tables, and a number of Tech levels and applied general qualifications from the 2017 16 to 19 performance tables, or
	other technical and professional qualifications which are part of the RQF and listed as part of the legal entitlement for the Level 3 entitlement which must be at least 300 guided learning hours
Grant-funded providers	Providers with a financial memorandum or conditions of funding (grant).
Guided Learning	As defined by Ofqual: "The activity of the learner in being taught or instructed by – otherwise participating in education or training under the immediate guidance or supervision or – a lecturer, supervisor, tutor or other appropriate provider of education ortraining.
	For these purposes the activity of 'participating in education and training' shall be treated as including the activity of being assessed if the assessment takes place under the immediate guidance or supervision of a lecturer, supervisor, tutor or other appropriate provider of education or training. You can find more information in the Ofqual General Conditions of Recognition September 2015.
Hardship	Within the Loans Bursary Fund Learner Support, a category of support to assist vulnerable and disadvantaged learners to remove barriers to education and training.
The Hub	The Hub provides online services including the return of your individualised learner record (ILR) and completed Earnings Adjustment Statement (EAS). You can also search all learning aims, components of qualifications, apprenticeship frameworks and standards along with their validity and funding details.
Individualised learner record (ILR)	The primary data collection we request from learning providers for further education and work-based learning in England. The data is used widely, most notably by the government, to monitor policy implementation and the

	performance of the sector. It is also used by organisations that allocate funding for further education.
Information advice and guidance (IAG)	Services available to learners to enable them to consider further learning opportunities, progression and career choices.
Initial Liability Point	When a learner undertakes a learning aim funded through an Advanced Learner Loan, the point at which a provider can confirm that the learner has started learning, and the point at which the learner becomes liable for their loan.
Learner file	A collection of documents and information brought together to form a single point of reference relating to the learning that is taking place.
	This provides the evidence to prove that the learner, for whom loans payments have been made by the SLC, exists and is undertaking the learning aim that the loan is funding.
Learning aim reference number	The unique eight-digit code used to identify a specific learning aim.
Learning Provider Portal	A service managed by the Student Loans Company (SLC) for providers to obtain and input information for loansfunded learners.
Loans Bursary Fund	A fund to provide learner and learning support-type assistance to learners who are funding their learning through an Advanced Learner Loan. It also provides areacost uplifts to eligible providers.
Loans Facility	The SFA issues loans facilities agreements to eligible providers. This facility agreement enables providers to offer loan-funded provision to individuals, and to receive payments from the Student Loans Company (SLC) on behalf of individuals.
Personal Learning Record (PLR)	A database which allows individual learners access to their past and current achievement records. These can be shared with schools, colleges, further education training providers, universities or employers.
Learning planned end date	The date entered onto the individualised learner record (ILR) when the learner is expected to complete their learning.

Prescribed higher education	Any provision at Level 4 or above which is classed as a first degree, foundation degree or higher national.
Recognition of prior learning (RPL)	An assessment method that considers whether a learner can demonstrate that they can meet the outcomes for a qualification or a component of a qualification through knowledge, understanding or skills they already have and so do not need to undertake a course of learning for that component or qualification.
Register of training organisations	A register that provides assurance on organisations that deliver education and training services funded by the SFA, or subcontractors with more than £100,000 in our supply chain. Organisations apply to enter the Registerby completing our market-entry pre-qualification process which includes due diligence questions and testing of capacity and capability.
Residential support	Within the Loans Bursary Fund, a category of Learner Support to help learners receiving specialist provision which involves a residential element, or to support learners who cannot receive provision locally.
Self- certification	A process where the learner is able to confirm something through their own signature.
Start of learning	The date on which learning begins. We do not consider enrolment, induction, diagnostic assessment or prior assessment to be part of learning.
Subcontractor	A separate legal entity that has an agreement with you to deliver any element of the education and training we fund, or which is funded through Advanced Learning Loans. A separate legal entity includes companies in your group, other associated companies and sole traders. It also includes individuals who are self-employed or supplied by an employment agency, unless those individuals are working under your direction and control, in the same way as your own employees.
UK Provider Reference Number	A number given to all providers by the UK Register of Learning Providers to enable them to be easilyidentified.
Unique Learner Number	A 10-digit number used to match a learner's achievement to their personal learning record (PLR).

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