



OS-HELP

Estimates

User Guide

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

Release 2.2

August 2014

Contents

1	Introduction	4
1.1	Purpose	4
1.2	Timing of Estimates	4
1.3	History Reports	4
1.4	OS-HELP Process Flow.....	5
1.5	OS-HELP Estimates Processing	6
1.6	Signing-off Estimates	6
1.7	Before Starting.....	6
1.8	Logging into HEIMS Online.....	6
1.9	Technical Issues/Support.....	7
1.10	Access to OS-HELP.....	8
2	Web Page Features	10
2.1	Login Id and Time	10
2.2	Navigation Bar	10
2.3	Breadcrumbs	11
2.4	Header Details	11
2.5	Download Report Link.....	11
2.6	Year Tabs	11
2.7	Footnotes.....	12
2.8	Edit Fields.....	12
2.9	Messages	12
2.9.1	Error Messages	12
2.9.2	Warning Messages	12
2.9.3	Information Messages.....	13
2.10	Printing	13
3	Web Page Functions	14
3.1	Edit Fields.....	14
3.2	Edit OS-HELP Loan Amount.....	14
3.3	Save Changes	14
3.4	Cancel Changes	14
4	Adjusting OS-HELP Estimates	16
4.1	Overview.....	16
4.2	Loan Estimates	17
4.2.1	Current Year	17
4.2.2	Next Year.....	18
5	Confirm and sign-off Estimates	20
5.1	Overview.....	20
5.2	Confirm Estimates Details.....	21
5.3	Sign-off Estimates.....	22
5.4	Amending Signed-off Estimates.....	23

6	History Reports	24
6.1	Overview.....	24
6.2	Display History Reports	25

1 Introduction

1.1 Purpose

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

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

The **Program Funding** application web pages allow providers to record and submit OS-HELP estimates online.

1.2 Timing of Estimates

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

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

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

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

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

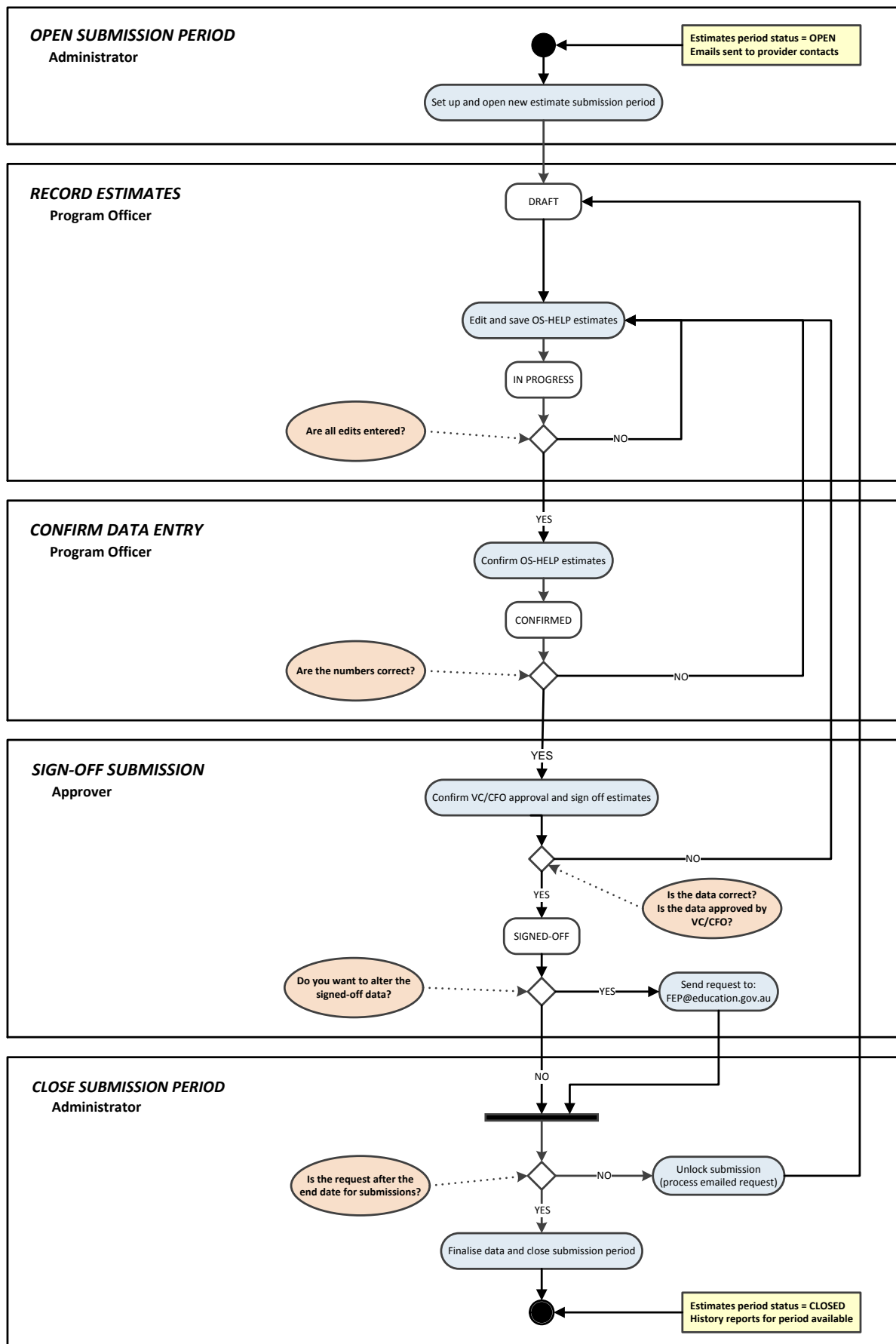
1.3 History Reports

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

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

The application will start with a history report of the estimates submitted in Estimates Period 1 (April 2014 submission).

1.4 OS-HELP Process Flow



1.5 OS-HELP Estimates Processing

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

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

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

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

1.6 Signing-off Estimates

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

1.7 Before Starting

The **Program Funding** application is located within HEIMS Online.

To apply for access to OS-HELP estimates, select the appropriate role for OS-HELP for the user in the **Program Funding** application in the [Access to HEIMS applications form](#) and send the completed form to heims.datacollections@education.gov.au for processing. The access request form is available in HEIMS Help.

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

The access roles for OS-HELP are:

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

All three roles have access to view history reports and current data reports.

A user can be assigned one or more access roles (i.e., to enter and approve estimates data).

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

1.8 Logging into HEIMS Online

Program Funding is accessed from HEIMS Online at <https://app.heims.education.gov.au/HeimsOnline>.

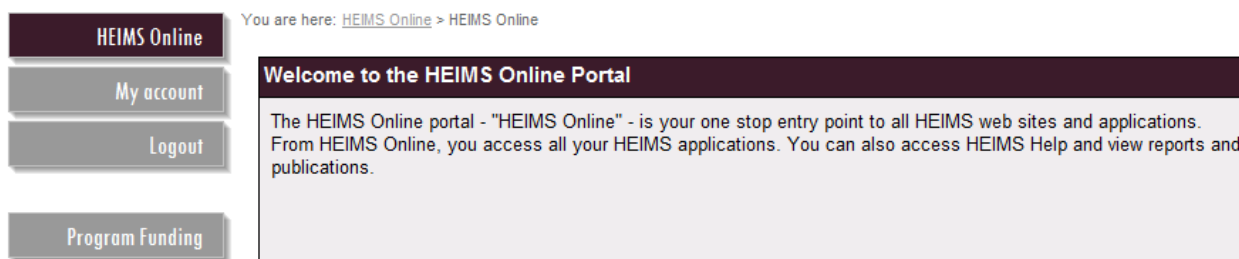
1.9 Technical Issues/Support

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

- heims.datacollections@education.gov.au – for issues relating to system access
- fep@education.gov.au – for issues relating to estimates processing

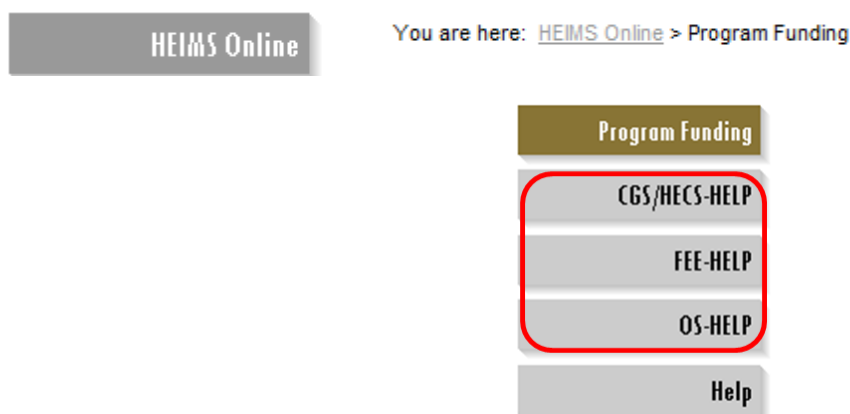
1.10 Access to OS-HELP

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



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

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



The **OS-HELP** home page is accessed by selecting **OS-HELP** when the **Program Funding** application menu has been expanded. Select **OS-HELP**:



To update OS-HELP, select **OS-HELP Estimates**

Program Funding

OS-HELP

OS-HELP Estimates

Sign-off Estimates

History Reports

Then select **Loan Estimates**:

Program Funding

OS-HELP

OS-HELP Estimates

Loan Estimates

2 Web Page Features

Heims Online

You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#) > [OS-HELP Estimates](#) > [Loan Estimates](#)

You are logged in as: ExamplePvt1 Combined 08:48:48 AM

Navigation Bar

Breadcrumbs

Message

Header Details

Download Report Link

Edit Field

Year Tabs

Footnotes

OS-HELP Estimates – Loan Estimates

Provider: Example Provider 1 (EX01)
Estimates Period: 2014 Period 2
Estimates Due Date:
Provider Estimates Status: Draft
[Download Report](#)

	Current Number of Loans	Adjusted Number of Loans	Number of Loans Difference	Number of Loans % Variance
OS-HELP Study in Non-Asian Countries	100	110	10	10.00 %
OS-HELP Study in Asia	175	99.99	0	0.00 %
OS-HELP Language Study	175	175	0	0.00 %
Total OS-HELP Loans	275	275	0	0.00 %

• OS-HELP Study in Non-Asian Country is E490=240.
• OS-HELP Study in Asia is E490=241.
• OS-HELP Language Study is E490=242.
• The Total OS-HELP Loans is the sum of the OS-HELP Study in Non-Asian Countries loans and the OS-HELP Study in Asia loans.

OS-HELP Liability

	Current Liability	Adjusted Liability	Liability \$ Difference	Liability % Variance
OS-HELP Liability	\$2,337,500	\$2,337,500	\$0	0.00 %

• The OS-HELP Liability is calculated by multiplying the Total OS-HELP Loans by the OS-HELP Maximum Loan Amount.

[Save](#) [Cancel](#)

2.1 Login Id and Time

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

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

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

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

2.2 Navigation Bar

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

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

- **Programme Home Page**
 - Select this option to list all programme sections available for the selected programme.
 - From time to time, information specific to the submission period will be published in the **News** section on the programme home page.
- **Programme Section**
 - Lists all the web pages available for the programme.
 - Select the programme section to display the web page where data can be entered or view.
- **Details Web Pages**
 - Individual web pages for data entry or to view data.

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

Note: As web pages are selected in the navigation bar, they will be highlighted. Select the **OS-HELP** option to return to list all the OS-HELP programme sections.

2.3 Breadcrumbs

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

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

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


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

2.4 Header Details

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

2.5 Download Report Link

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

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

2.6 Year Tabs

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

	Estimates Period 1	Estimates Period 2
--	---------------------------	---------------------------

Loan Estimates	Current year ONLY	Current year and the following <u>next</u> year, e.g., 2014 to 2015
----------------	-------------------	---

2.7 Footnotes

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

2.8 Edit Fields

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

100	<input type="text" value="120"/>
175	<input type="text" value="175"/>
175	<input type="text" value="175"/>

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

100	<input type="text" value="140"/>
175	<input type="text" value="99.99"/>
175	<input type="text" value="175"/>

2.9 Messages

2.9.1 Error Messages

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

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

The error message is displayed immediately below the breadcrumbs.

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

100	<input type="text" value="140"/>
175	<input type="text" value="99.99"/>
175	<input type="text" value="175"/>

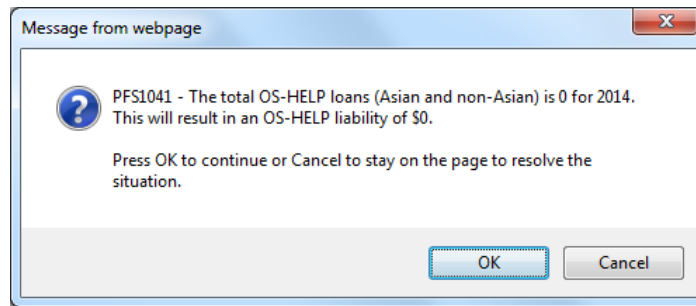
When an error message is displayed, changes that have been made on the web page will not be saved until the error is resolved.

2.9.2 Warning Messages

Warning messages can also be displayed on the page.

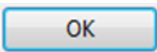

A warning allows the user to decide whether to continue to the changes or stay on the current web page to resolve the situation.

Warning messages are displayed in the form of a pop-up over the page. For example:



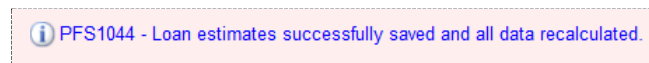
The text in the pop-up message identifies the potential data problem.

Select one of two actions:

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

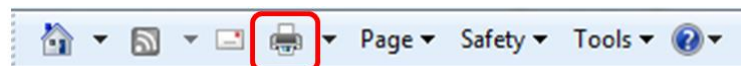
2.9.3 Information Messages

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



The information message is displayed immediately below the breadcrumbs.

2.10 Printing



Details on any web page can be printed.

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

3 Web Page Functions

3.1 Edit Fields

To edit any field:

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

3.2 Edit OS-HELP Loan Amount

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

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

3.3 Save Changes

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

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

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

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



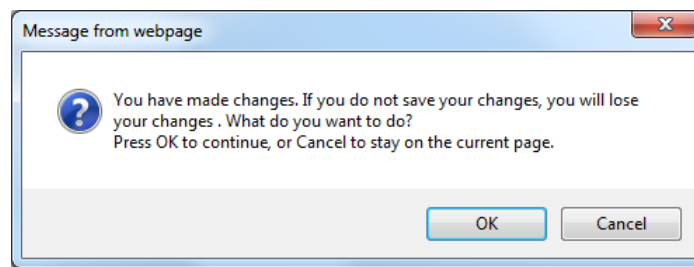
Changes need to be saved at regular intervals. The system will log out when there has not been any activity in a 20 minute period. Any data that have not been saved will be lost.

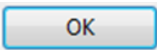
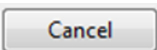
3.4 Cancel Changes

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

To cancel the changes, click .

The following pop-up message is displayed:

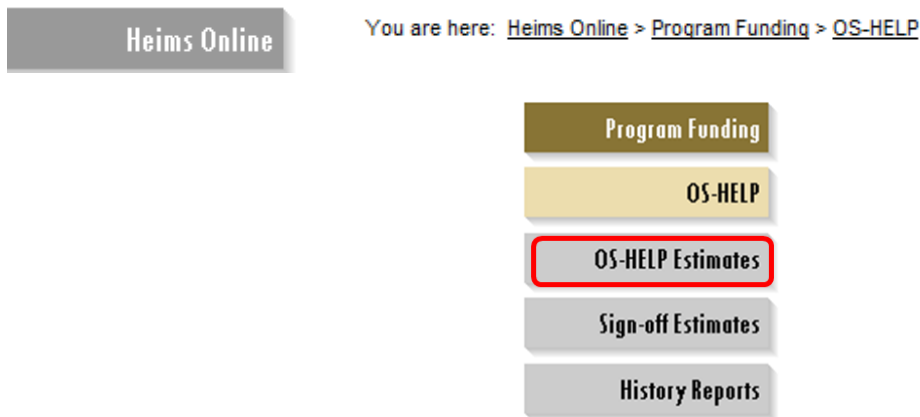


- Click  – unsaved data are discarded and the page is refreshed with the latest saved details.
- Click  – the unsaved page is redisplayed.


4 Adjusting OS-HELP Estimates

4.1 Overview

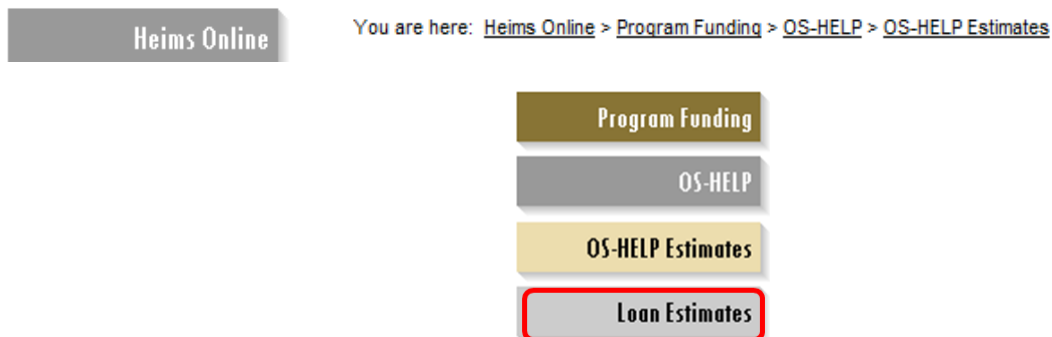
The **OS-HELP Estimates** home page is accessed by selecting **OS-HELP Estimates** when the **OS-HELP** menu has been expanded:



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

 PFS1008 - Your estimates cannot be adjusted and signed-off at this time. You will be advised when the estimates window is open for you to adjust your estimates.

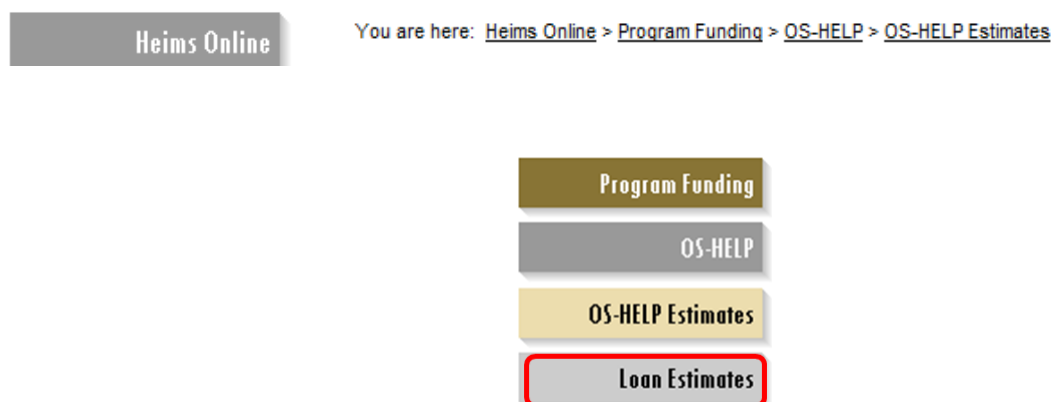
When the submission period is open, expand **OS-HELP Estimates** to display the web pages that can be selected from the navigation bar:



OS-HELP Estimates Option	Function
Loan Estimates	<ul style="list-style-type: none">Adjust OS-HELP loan estimates.

4.2 Loan Estimates

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





4.2.1 Current Year

Heims Online You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#) > [OS-HELP Estimates](#) > Loan Estimates

2014		2015		
Number of OS-HELP Loans				
	Current Number of Loans	Adjusted Number of Loans	Number of Loans Difference	Number of Loans % Variance
OS-HELP Study in Non-Asian Countries	100	100	0	0.00 %
OS-HELP Study in Asia	175	175	0	0.00 %
OS-HELP Language Study	175	175	0	0.00 %
Total OS-HELP Loans	275	275	0	0.00 %
<ul style="list-style-type: none">• OS-HELP Study in Non-Asian Country is E490=240.• OS-HELP Study in Asia is E490=241.• OS-HELP Language Study is E490=242.• The Total OS-HELP Loans is the sum of the OS-HELP Study in Non-Asian Countries loans and the OS-HELP Study in Asia loans.				
OS-HELP Liability				
OS-HELP Maximum Loan Amount	\$8,500			
	Current Liability	Adjusted Liability	Liability \$ Difference	Liability % Variance
OS-HELP Liability	\$2,337,500	\$2,337,500	\$0	0.00 %
<ul style="list-style-type: none">• The OS-HELP Liability is calculated by multiplying the Total OS-HELP Loans by the OS-HELP Maximum Loan Amount.				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

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


- 'Current Year' in Estimates Period 1; and
- 'Current Year' in Estimates Period 2.

	<p><u>Adjust</u> one or more of the following OS-HELP values for the 'Current Year' on the Loan Estimates page:</p> <ul style="list-style-type: none"> • Number of OS-HELP study in Asia loans; • Number of OS-HELP study in non-Asian countries loans; • Number of OS-HELP language loans.
	<p>The OS-HELP loans used for the purpose of calculating the OS-HELP liability are:</p> <ul style="list-style-type: none"> • OS-HELP study in Asia loans; <u>plus</u> • OS-HELP study in non-Asian countries loans. <p>The Loan Estimates page provides a comparison between the adjusted data and the current data.</p>

4.2.2 Next Year

2014	2015
Number of OS-HELP Loans	
	Initial Number of Loans
OS-HELP Study in Non-Asian Countries	100
OS-HELP Study in Asia	175
OS-HELP Language Study	175
Total OS-HELP Loans	275
<ul style="list-style-type: none"> • OS-HELP Study in Non-Asian Country is E490=240. • OS-HELP Study in Asia is E490=241. • OS-HELP Language Study is E490=242. • The Total OS-HELP Loans is the sum of the OS-HELP Study in Non-Asian Countries loans and the OS-HELP Study in Asia loans. 	
OS-HELP Liability	
OS-HELP Maximum Loan Amount	\$8,653
	Initial Liability
OS-HELP Liability	\$2,379,575
<ul style="list-style-type: none"> • The OS-HELP Liability is calculated by multiplying the Total OS-HELP Loans by the OS-HELP Maximum Loan Amount. 	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

	<p><u>Adjust</u> one or more of the following initial OS-HELP values for the 'Next Year' on the Loan Estimates page:</p> <ul style="list-style-type: none"> • OS-HELP study in Asia; • OS-HELP study in non-Asian countries; and • OS-HELP language study.
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The OS-HELP loans used for the purpose of calculating the OS-HELP liability are:

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

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

To save the changes, click [Save](#).

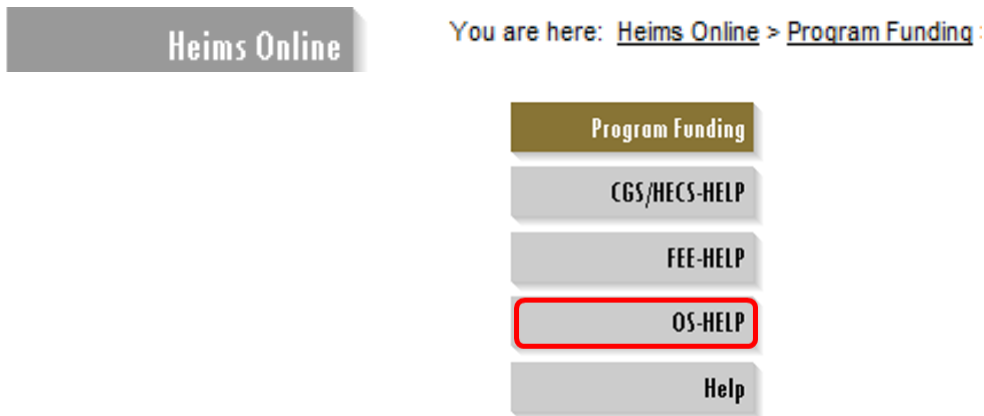


Changes need to be saved at regular intervals. The system will log out when there has not been any activity in a 20 minute period. Any data that have not been saved will be lost.

5 Confirm and sign-off Estimates

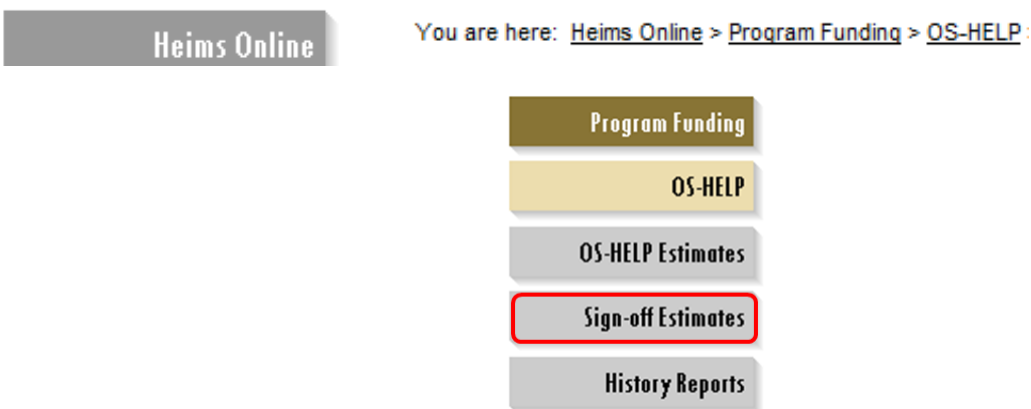
5.1 Overview

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

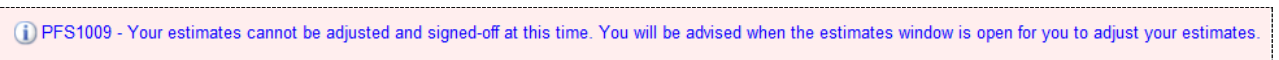


Select **OS-HELP**.

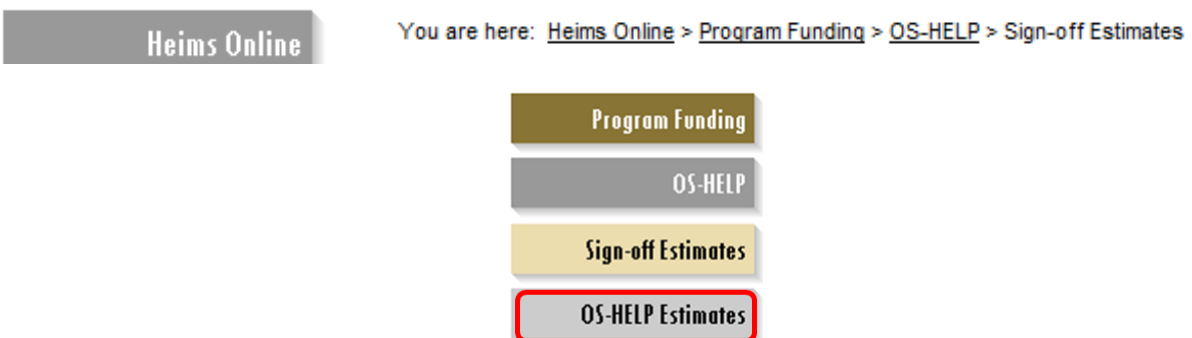
The **Sign-off Estimates** home page is accessed by selecting **Sign-off Estimates** when the **OS-HELP** menu has been expanded:



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



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



Select **OS-HELP Estimates**

Sign-off Estimates Option	Function
OS-HELP Estimates	<ul style="list-style-type: none"> Confirm and sign-off OS-HELP estimates.

5.2 Confirm Estimates Details

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

Estimates Period 1

You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#) > [Sign-off Estimates](#) > OS-HELP Estimates

Sign-off Estimates – OS-HELP Estimates								
Provider: Macquarie University (3025)								
Estimates Period: 2016 Period 2								
Estimates Due Date: 01/09/2014								
	2016					2017		
Provider Estimates Status	Total OS-HELP Loans	Total OS-HELP Loans Difference	OS-HELP Liability	OS-HELP Liability \$ Difference	OS-HELP Liability % Variance	Initial Total OS-HELP Loans	Initial OS-HELP Liability	Confirm Estimates
Draft	355	0	\$4,011,500	\$0	0.00 %	355	\$4,031,025	<input type="button" value="Confirm"/>
<ul style="list-style-type: none"> The estimates must be confirmed first before sign-off. The reason for variation must be provided when the OS-HELP Liability exceeds by +/- 10% and +/- \$100,000. To sign-off, indicate that the estimates have been certified by the Vice-Chancellor, Chief Executive Officer and/or Chief Financial Officer and then click the 'Sign-off Estimates' button. To adjust your estimates after sign-off, contact FEP@education.gov.au. 								
Reason for Variation:								
<div style="border: 1px solid black; height: 40px; width: 100%;"></div>								
<input type="checkbox"/> Certified by the Vice-Chancellor, Chief Executive Officer and/or Chief Financial Officer								
<input type="button" value="Sign-off Estimates"/>								

Estimates Period 2

You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#) > [Sign-off Estimates](#) > OS-HELP Estimates

Sign-off Estimates – OS-HELP Estimates

Provider: Example Provider 1 (EX01)
Estimates Period: 2014 Period 2
Estimates Due Date: XXXXXXXXXX

	2014					2015		
Provider Estimates Status	Total OS-HELP Loans	Total OS-HELP Loans Difference	OS-HELP Liability	OS-HELP Liability \$ Difference	OS-HELP Liability % Variance	Initial Total OS-HELP Loans	Initial OS-HELP Liability	Confirm Estimates
In Progress	295	20	\$2,507,500	\$170,000	7.27 %	295	\$2,552,635.00	Confirm


- The estimates must be confirmed first before sign-off.
- The reason for variation must be provided when the OS-HELP Liability exceeds by +/- 5% and +/- \$50,000.
- To sign-off, indicate that the estimates have been certified by the Vice-Chancellor and/or Chief Financial Officer and then click the 'Sign-off Estimates' button.
- To adjust your estimates after sign-off, contact fep@innovation.gov.au.

Reason for Variation:

☐ Certified by the Vice-Chancellor and/or Chief Financial Officer

[Sign-off Estimates](#)

To confirm the OS-HELP estimates, click [Confirm](#).

	The <i>Total OS-HELP Loans</i> and <i>Initial Total OS-HELP Loans</i> used for the purpose of calculating the OS-HELP liability are: <ul style="list-style-type: none">OS-HELP study in Asia loans; <u>plus</u>OS-HELP study in non-Asian countries loans.
	The <i>Total OS-HELP Loans Difference</i> is the difference between the adjusted total OS-HELP loans and the current total OS-HELP loans.
	The <i>OS-HELP Liability \$ Difference</i> and the <i>OS-HELP Liability % Variance</i> is the difference between the adjusted OS-HELP liability and the current OS-HELP liability.
	The <i>Provider Estimates Status</i> is updated to Confirmed when the estimates have been confirmed.

5.3 Sign-off Estimates

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

Sign-off Estimates – OS-HELP Estimates

Provider: Example Provider 1 (EX01)
Estimates Period: 2014 Period 2
Estimates Due Date: XXXXXXXXXX

	2014					2015		
Provider Estimates Status	Total OS-HELP Loans	Total OS-HELP Loans Difference	OS-HELP Liability	OS-HELP Liability \$ Difference	OS-HELP Liability % Variance	Initial Total OS-HELP Loans	Initial OS-HELP Liability	Confirm Estimates
Confirmed	295	20	\$2,507,500	\$170,000	7.27 %	295	\$2,552,635.00	<input type="button" value="Confirm"/>


- The estimates must be confirmed first before sign-off.
- The reason for variation must be provided when the OS-HELP Liability exceeds by +/- 5% and +/- \$50,000.
- To sign-off, indicate that the estimates have been certified by the Vice-Chancellor and/or Chief Financial Officer and then click the 'Sign-off Estimates' button.
- To adjust your estimates after sign-off, contact fep@innovation.gov.au.

Reason for Variation:

☐ Certified by the Vice-Chancellor and/or Chief Financial Officer

To sign-off the OS-HELP estimates:

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


	<p>The reason for the variation must be supplied when <u>both</u> the <i>Total OS-HELP Liability \$ Difference</i> and <i>Total OS-HELP Liability % Variance</i> for the 'Current Year' have exceeded the specified variation thresholds. Note: The specified variation thresholds are outlined in the footnote on the OS-HELP Estimates page (see screenshot above).</p>
	<p>The <i>Provider Estimates Status</i> is updated to Signed-off when the estimates have been signed-off.</p>

5.4 Amending Signed-off Estimates

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

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

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

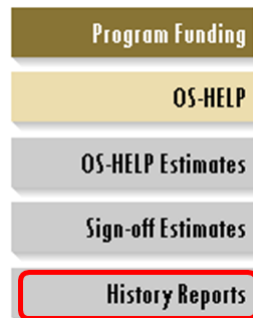
	<p>To adjust the estimates after the estimates have been signed-off, contact fep@education.gov.au.</p>
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6 History Reports

6.1 Overview

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

Heims Online You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#)



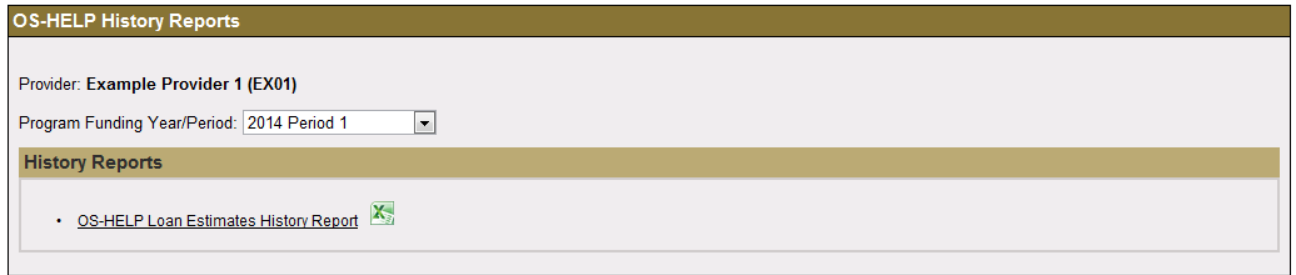
When final submitted data from previous reporting periods are available, expand **OS-HELP History Reports** to display the web pages that can be selected from the navigation bar:

Heims Online You are here: [Heims Online](#) > [Program Funding](#) > [OS-HELP](#) > History Reports



History Reports Option	Function
OS-HELP History Reports	<ul style="list-style-type: none">View details of previously submitted OS-HELP estimates.

6.2 Display History Reports




OS-HELP History Reports

Provider: Example Provider 1 (EX01)


Program Funding Year/Period: 2014 Period 1

History Reports

- [OS-HELP Loan Estimates History Report](#) 

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

To display an OS-HELP history report:

- Select a previous submission period, if required; and
- Click on the history report name (this is a hyperlink) to display the selected report in a separate window; OR
- Click the  icon displayed next to the history report name to download the selected report directly to Excel.