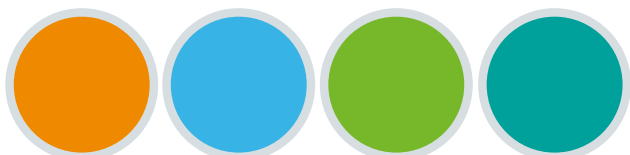


Student Services

NHS Learning Support Fund



NHS LSF

Travel and Dual

Accommodation Expenses

(TDAE) Portal Guide



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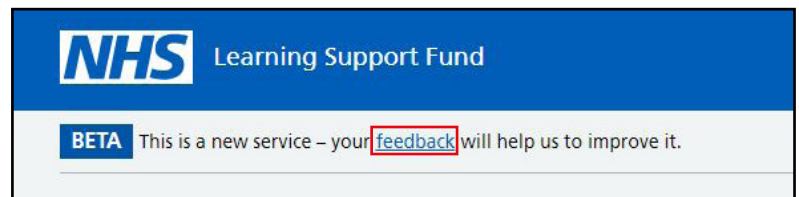
1. Introduction

If a student has attended a placement as part of their course, they may be able to claim back:

- excess costs for travel relating to their placement, compared to their usual journey to university
- dual accommodation costs they paid for to attend their placement

2. Feedback

This is **your** portal; your feedback is important if we are to shape future development to deliver the best experience for you.



As part of our continuous improvements, we carry out Stakeholder and User Research sessions to help us improve the functionality of the NHS LSF HEI portal.

Based on the feedback received during the sessions, we have made some updates to the HEI portal making the system more efficient and user friendly.

If you would like to provide feedback regarding the portal, please log in and use the link at the top of the page as highlighted here.

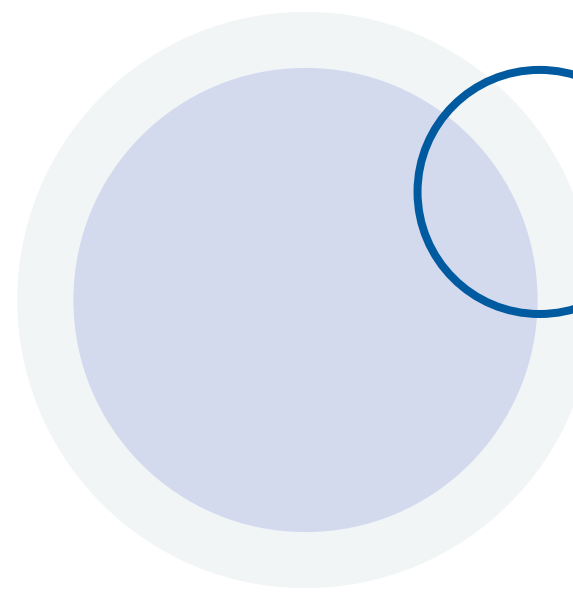
We welcome all feedback and will analyse all contributions to inform development of future functionality.

3. Purpose

The functionality available to you is determined by your assigned role. The TDAE portal will allow you to review, authorise and return students' TDAE claims.

You can view all new and previous TDAE applications submitted by your students. You will also be able to view any cases that have been returned to you by the NHSBSA which will require further action, either by you or/and the student.

The TDAE scheme rules and policy can be found [here](#).



4. Logging in

You need an account to use the portal. Accounts come in two types (**see Dashboard - User administration section**).

Once your account is created, you will receive an activation link via email and be asked to create a password.



You can then access the portal with your email and password.

Once logged in, your email address will appear in the upper right corner of the portal along with an option to logout.

5. Welcome to your dashboard

When you log into your account, you will land on the portal dashboard. From here, you will have a quick reference snapshot of all active TDAE claims you have.

There is a Notice Board where we will post relevant and useful documents and articles to address common themes/questions, and this will evolve over time.

Dashboard

YORK ST JOHN UNIVERSITY

Travel and Dual Accommodation Expenses

1

Active TDAE claims

[View active TDAE claims](#)

Notice board

Here you'll find answers to frequently asked questions and any messages from NHSBSA Student Services.

If your query is not answered by the items on the notice board, you can raise a general query.

- ▶ [Confirmation of Attendance](#)
- ▶ [Changes to Travel And Dual Accommodation \(TDAE\) claim and approval process](#)

6. View active TDAE claims

The 'View active TDAE claims' button on the portal takes you to the details of all the active TDAE claims assigned to your university.

On this page you will be able to

- View 'Previously processed claims'
- Download details of claims that need processing' using CSV
- You can filter all claims

Active TDAE claims

These are claims that you need to start processing or complete. Claims are displayed in order of when they were submitted, with the oldest at the top.

[View previously processed claims](#)

[Download details of claims that need processing \(CSV, 1KB\)](#)

Show filter

TDAE claims list

Student name	Course	Claim submitted	Status	Action
Cosa Demo	Adult Nursing	17 October 2024	To be completed	Process claim

1 Showing 1 - 1 of 1 claims

Clicking 'Process claim' will begin the assessment

- **'Student personal and course details'**
This will show you the student's NHS LSF reference number, academic year and course they are studying.
- On this screen you will see how many sections have been completed and how many sections are still outstanding.
- By clicking on 'Claim notes and history' You will be able to view when a student has submitted a claim, along with a claim audit trail.

Following on from your initial checks, you will now be required to commence processing 'Travel Details'. Within the 'Travel details' section you will be presented with two options:

- Check university travel details
- Check placement travel details

[Go back](#)

Travel and Dual Accommodation Expenses

Cosa Demo

[Student's personal and course details](#)

Claim start and end date 1 February 2024 to 30 May 2024

Total claim value £15.02 [View Costs summary](#)

There are incomplete checks for this claim
You have completed 1 of 2 sections.

[Claim notes and history](#)

1. Travel details

[Check university travel details](#) **Completed**

[Check placement travel details](#) **Completed**

2. Finish checking claim

[Submit claim checks](#) **Not started**

Return or decline this claim

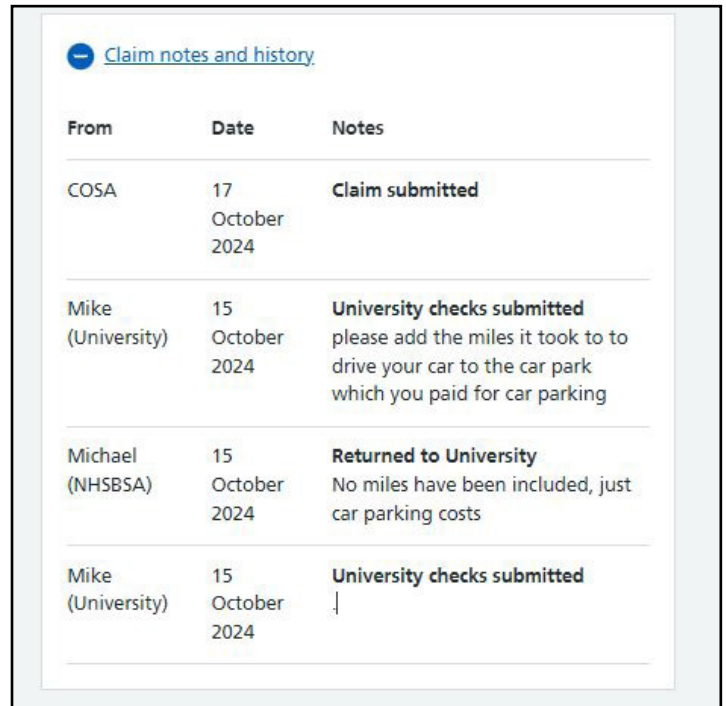
If there are issues with this claim, you can either:

- return it to the student
- decline the claim

Return or decline claim

In the above two sections you will be able to add comments, check all supporting documentation, authorise the claim or 'Return and decline claim' Additional guidance can be found [here](#).

You will only be able to authorise a claim once all sections have been completed and the declaration has been ticked.



From	Date	Notes
COSA	17 October 2024	Claim submitted
Mike (University)	15 October 2024	University checks submitted please add the miles it took to to drive your car to the car park which you paid for car parking
Michael (NHSBSA)	15 October 2024	Returned to University No miles have been included, just car parking costs
Mike (University)	15 October 2024	University checks submitted

7. Active TDAE claim statuses

To be completed - claim needs to be reviewed.

Started by you - case is locked by you and will unlock at the end of each day.

Started by [...] - case is locked by your colleague and will unlock at the end of each day.

Returned from NHSBSA - action is required. Click 'view claim'. The reason for return will be provided in the 'claims notes and history'.

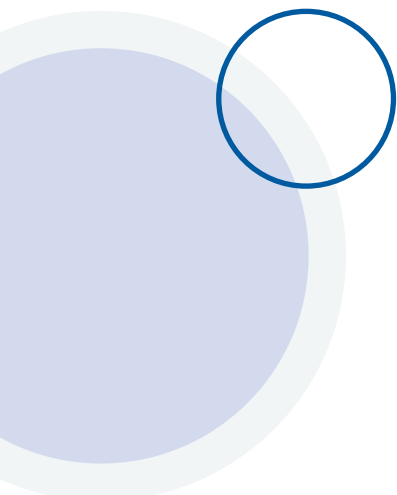
8. Previous TDAE claim statuses

Returned to student – this has been sent back to the student because it needs to be reviewed or completed, or because further evidence is required. You can check the reason by clicking 'view claim'. The reason for return will be provided in the 'claims notes and history'.

Submitted to the NHSBSA – the university has authorised the claim and submitted to the NHSBSA for assessment.

Paid – the claim has been assessed by the NHSBSA and payment has been released.

Rejected – either by the university or NHSBSA. Click 'view claim'. The reason for rejection will be provided in the 'claims notes and history'.



9. Filter statuses

This will then open the following screen allowing you to search and filter by using the following categories.

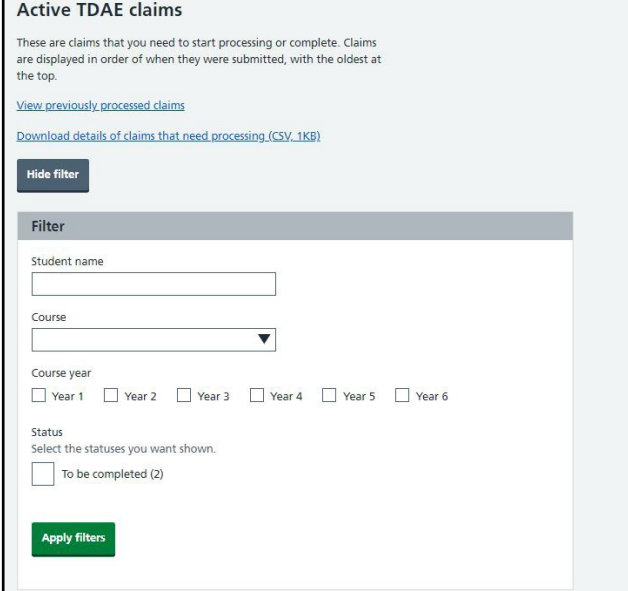
Student name - the ability to search for a student by name.

Course – all students who have claimed on a specific course or the courses you administer.

Course year – all students on a specific study year

Status – show all claims with a specific status (for example, to be completed), started by you.

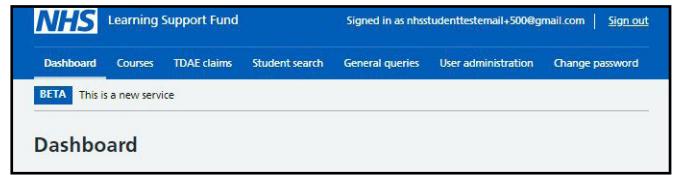
To view information in the category you have selected, you need to click 'Apply filter'.



The screenshot shows a web interface for 'Active TDAE claims'. At the top, there is a title 'Active TDAE claims' and a brief explanation: 'These are claims that you need to start processing or complete. Claims are displayed in order of when they were submitted, with the oldest at the top.' Below this are two links: 'View previously processed claims' and 'Download details of claims that need processing (CSV, 1KB)'. A 'Hide filter' button is located below the links. The main section is titled 'Filter' and contains several input fields: a text box for 'Student name', a dropdown menu for 'Course', and a group of radio buttons for 'Course year' (Year 1 through Year 6). Underneath, there is a 'Status' section with the instruction 'Select the statuses you want shown.' and a single radio button option 'To be completed (2)'. At the bottom of the filter section is a green 'Apply filters' button.

10. General queries

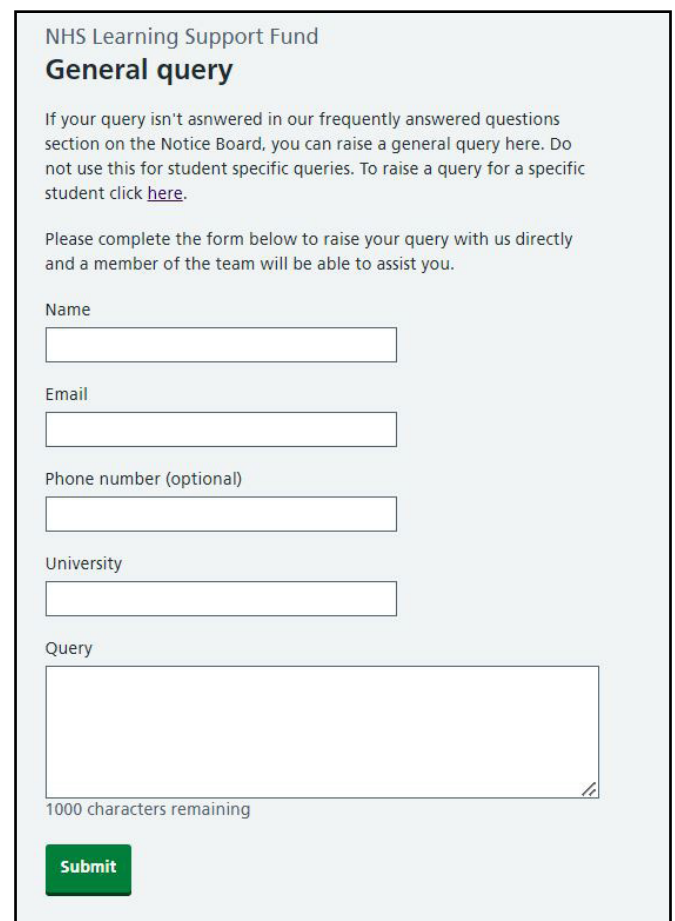
If your query isn't in our frequently answered questions section on the Notice Board and isn't student specific, you can raise a general query using the relevant option in the navigation menu.



You'll be presented with this e-form to complete. Some of the fields will be autocompleted based on your account information.

You should provide as much information as possible in the 'query' box, which can be expanded using the circled icon in the lower right corner if required.

Once complete, click 'submit' and this will be sent directly to a member of our team who will be able to assist you.

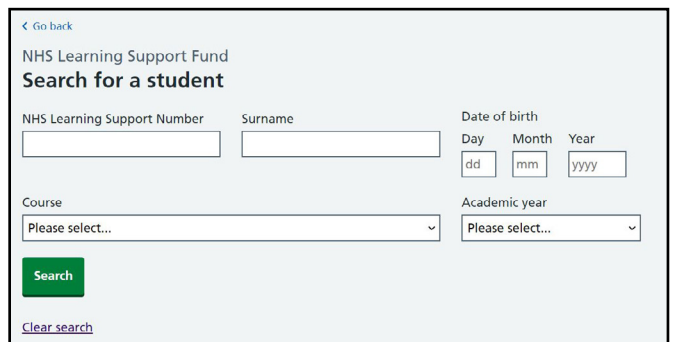
A screenshot of the 'General query' form on the NHS Learning Support Fund website. The form is titled 'NHS Learning Support Fund General query'. Below the title, there is a paragraph of text: 'If your query isn't answered in our frequently answered questions section on the Notice Board, you can raise a general query here. Do not use this for student specific queries. To raise a query for a specific student click [here](#).' Below this, there is another paragraph: 'Please complete the form below to raise your query with us directly and a member of the team will be able to assist you.' The form contains several input fields: 'Name', 'Email', 'Phone number (optional)', 'University', and a large 'Query' text area. Below the 'Query' field, it says '1000 characters remaining'. At the bottom of the form, there is a green 'Submit' button.

11. Student search

If you want to quickly find a student studying at your university, you can use the search function by selecting it in the navigation menu.



Clicking 'search' will return results for all students who have selected your university. If you want to refine your search, you can use any number/combination of the parameters presented.



Search results will list all students who meet the following three criteria:

- created an NHS LSF account and made an application
- are linked to your university via the selection they made on their application
- their application is approved

If the student you are searching for doesn't meet all of the above criteria then they will not be returned in results and they should check the information on their NHS LSF account.

Students have full control of the information that links them to your university, so should alter this if it is incorrect via their NHS LSF account.

12. Student specific general queries

To log a general student query, you need to search for the relevant student, by selecting Student Search in the navigation menu.

You will now be able to search for the student using a number of fields, such as:

- NHS LSF number
- surname
- date of birth
- course
- academic year

You will also be able to use a number of combinations to search for a student.

Clicking on the student's name will open the student's details screen where you can access the general student query option.

Joe Jackson		
Reference Number SSRN0083668	Date of birth 05/08/1980	Email nhsstudenttestemail+20@gmail.com
Address 1 High Lane Liverpool Fleetwood FY5 76P	Phone number 01234 1234567	General student query

General student query for Joe Jackson
Study year If your query relates to a specific year of study, then select it here Please select... <input type="text"/>
Query Tell us all the details of your query <input type="text"/>
1000 characters remaining
Submit

13. User administration

The types of users for the portal and their permissions are as follows:

HEI Admin

This role can only be assigned and managed by the NHSBSA Student Services. Any user with this role has control over all other users at their university and can manage these (including creation of new users, amendment to current users and deactivating accounts for users no longer required) via the 'User administration' section. They have access to the 'Courses' section and 'TDAE' section.

HEI Admin users assume responsibility for managing the other users at their university and it is expected that the user list will be maintained, including the deactivation of accounts where required.

If a HEI admin leaves their organisation, NHSBSA Student Services should be notified so the defunct admin account can be removed and another allocated if required. This can be actioned by submitting a general query - see section 10.

User Access

Assigning HEI Portal roles depending on your user's job role;

Confirmation of Student Attendance

COSA user – review, submit change request, termly COSA

COSA read only – view but not change or submit

COSA none – does not require a view of the COSA process

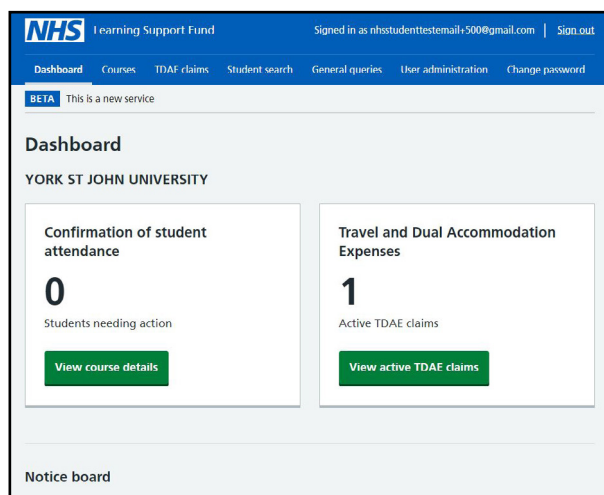
Travel and Accommodation Expenses access

TDAE user – review, assess, permission to authorise TDAE claims

TDAE read only – view but not authorised to access

TDAE none - doesn't not require a view of TDAE process

You can select an option in both categories if required.



NHS Learning Support Fund
Signed in as nhsstudenttestemail+500@gmail.com | Sign out

Dashboard Courses TDAE claims Student search General queries User administration Change password

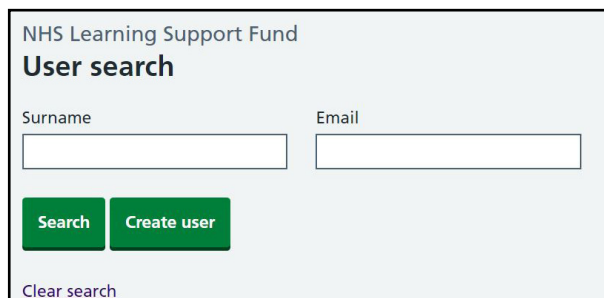
BETA This is a new service

Dashboard
YORK ST JOHN UNIVERSITY

Confirmation of student attendance
0
Students needing action
View course details

Travel and Dual Accommodation Expenses
1
Active TDAE claims
View active TDAE claims

Notice board

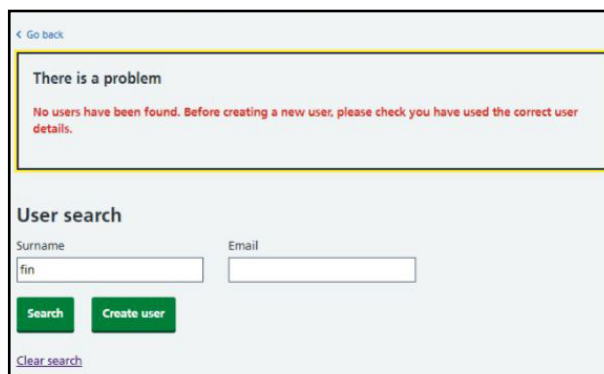


NHS Learning Support Fund
User search

Surname Email

Search Create user

Clear search



< Go back

There is a problem
No users have been found. Before creating a new user, please check you have used the correct user details.

User search

Surname Email

Search Create user

Clear search

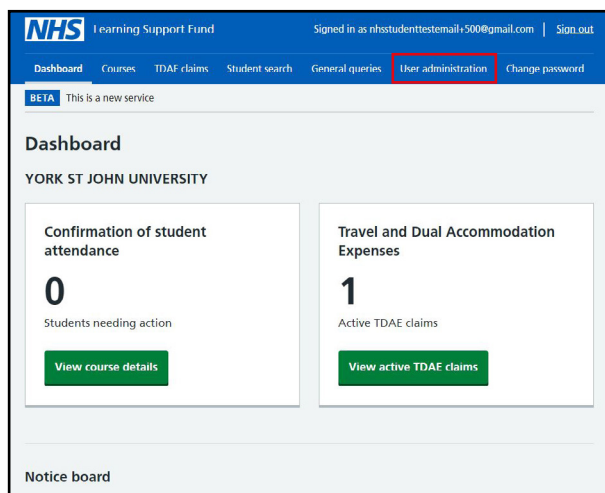
For example, if a member of staff works on both COSA and TDAE, select 'COSA user' and 'TDAE user'.

If they access TDAE but only need view COSA details, select 'TDAE user' and 'COSA read only'.

User administration can be accessed by clicking the relevant option of the navigation menu.

Once here, you'll be prompted to enter a surname and/or email address for the user, then click 'Search'. If the user exists, the portal will return a result.

If no search results are presented, this means there is no existing account for the user and you need to create one by clicking 'create user'.



Here you will need to provide the email address, surname, first name, Job/department, contact number and intended role type for the user and indicate whether the account is active or not.

Once this information is correct, click 'create'. This will email the new user with an activation link and next steps to activate their account.

Alternatively, immediately clicking 'search' will display a list of all existing users associated with your university.

Clicking a users' email address will present the details for the selected account. Actions here include:

- changing details for the account owner
- amending the role
- making the account active/inactive

Any changes you make to the account can be committed by clicking 'update' or aborted by clicking 'cancel'.

NHS Learning Support Fund | Signed in as nhstudenttestemail+500@gmail.com | Sign out

BETA This is a new service

< Go back

User search

Surname

Email address

Search

[Clear search](#)

< Go back

Create user

Email address

First name

Surname

Job or department

Phone number

Which courses is the user responsible for? (optional)
Select all that apply

Adult Nursing Physiotherapy

Occupational Therapy

User access

Confirmation of Student Attendance access

COSA user

COSA read only

COSA none

Travel and Dual Accommodation Expenses access

TDAE user

TDAE read only

TDAE none

Is this user active?
Select No to stop a user accessing the system. For example, if they leave the university.

Yes No

Create

[Cancel](#)

Please remember:

- do not share your password with anyone else as this creates a security risk to the student's accounts and across the wider systems.
- if someone requires a different user access level, please speak to your designated admin user in the first instance.
- it is important you notify us when users no longer require access so their accounts can be closed. By failing to notify us of a staff member no longer needed access, this creates a security risk to the students' accounts and the wider system.

< Go back

User search

Surname

Email

Search **Create user**

[Clear search](#)

Search results

Email	Name ▲	Role	Active
testenvironment277+9@gmail.com	Bobbus Cattus	HEI ADMIN	Yes
testenvironment277+8@gmail.com	Bobby Catty	HEI ADMIN	Yes
marshall.dave2000+heiaadmin4@gmail.com	Dave Marshall	HEI ADMIN	Yes
marshall.dave2000+hei@gmail.com	Dave Marshall	HEI ADMIN	Yes
marshall.dave2000+heiaadmin2@gmail.com	Dave Marshall	HEI ADMIN	No
swbtest001+hei008@gmail.com	eight eight	HEI ADMIN	Yes
swbtest001+hei018@gmail.com	eighteen eighteen	HEI ADMIN	Yes