

Student Information Management System (SIMS) Instructional Guide

Effective Date: October 11, 2023



StudentAidBC

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Section 1 Institution Account

1.1 Obtaining a BCeID

A BCeID will be required to access the institution account in the Student Information Management System (SIMS). Institutions are required to apply for a **Business BCeID** (further instructions below). In the event that a Business BCeID cannot be obtained, a **Basic BCeID** may be granted, but will only offer an institution limited functionality within SIMS. Business BCeID access is the StudentAid BC preferred path.

Business BCeID For the Institution

Instructions for setting up the Business BCeID are available [here](#).

Basic BCeID

The registration page for Basic BCeID is available [here](#).

1.2 Account Creation

Each institution will need to have a BCeID account created to access the SIMS system, and to have an account administrator added to that BCeID so that they can access it. Once this is this set up, the institution will go down one of two paths, depending on the type of BCeID they possess.

Business BCeID

Background:

Institutions with a Business BCeID will be able to manage more of the account and have an easier overall experience setting up their profile.

Process:

The institution user that is attached to the Business BCeID as the profile manager will log in to the SIMS Institution Account using their BCeID. The institution will be prompted to create the institution profile.



Complete the “Create Your institution Profile” page.

Create Your Institution Profile

Please confirm your email and add your institution details below. An account will be created for your institution and you will be assigned an admin.

Your profile

Given names ? Andrew	Last name ? Schwenker
--------------------------------	---------------------------------

Verified email
andrew.schwenker@gov.bc.ca

i **Updating read-only information**
The read-only information above is retrieved from your BCeID account and it is not possible to change it here. If any read-only information needs to be changed, please visit bceid.ca.

Your institution profile

Legal operating name ? Camosun College LTD
Operating name ?

Select create profile. The profile will be approved automatically and allow access to the main home page for the institution.

Basic BCeID

Background:

Each institution using a Basic BCeID will need to have an account created for them by StudentAid BC, and have a base user added to that account so that they can access it.

Documentation:

Below is a list of information that should be provided to StudentAid BC to support account creation for Basic BCeID users. Additional information may be required.

- All institution contacts and profile information
- Consent for StudentAid BC to set up the account on the institution's behalf - written consent in e-mail form will suffice.
- Proof that the account administrator has had their identity confirmed.
- List of users to be added.

1.3 Account Administration

Adding Users

Each institution needs to add users that will have access to the system and will be able to act on behalf of the institution.

There are three types of users: User, Admin and Legal Signing Authority.

Legal Signing Authority: Each institution can only have one legal signing authority. The legal signing authority must have the ability to sign on behalf of the institution for the purposes of SIMS designation status. This user type is the only one that can complete the designation request process.

Admin User: The admin user exists to handle all day-to-day institution account management. Admin users can interact with all locations.

User: Each user can complete day-to-day tasks. Users are attached to specific institution locations and will only be able to interact with the locations they are connected to.

Note: At this time there is no "read only" user type.

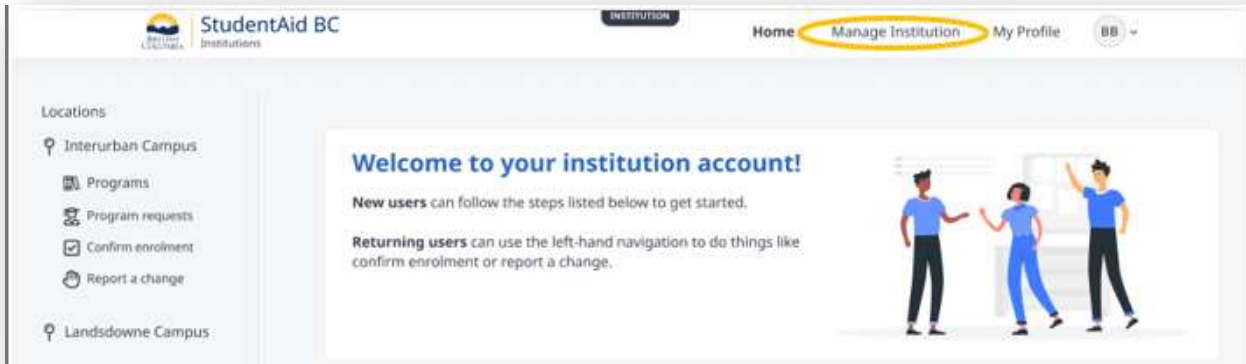
Add User for Business BCeID

Background:

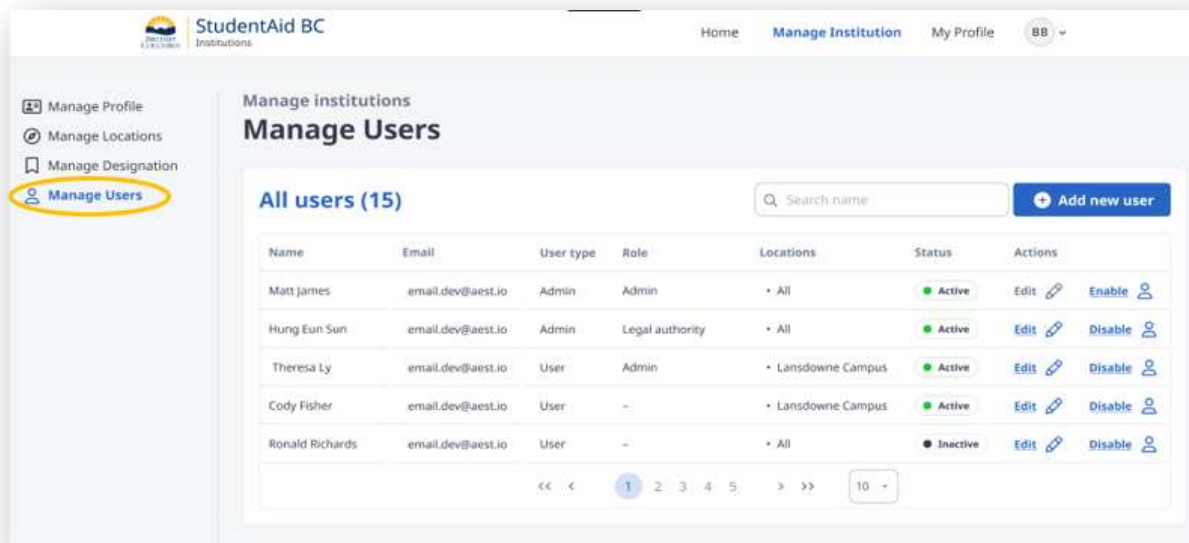
Institutions using a Business BCeID will manage the users in their institution account. To add a user the account manager of the Business BCeID account will need to update the users on the Business BCeID platform first because the information to add a user using the Student Information Management System will pull the names of the eligible users directly from the BCeID account.

Process:

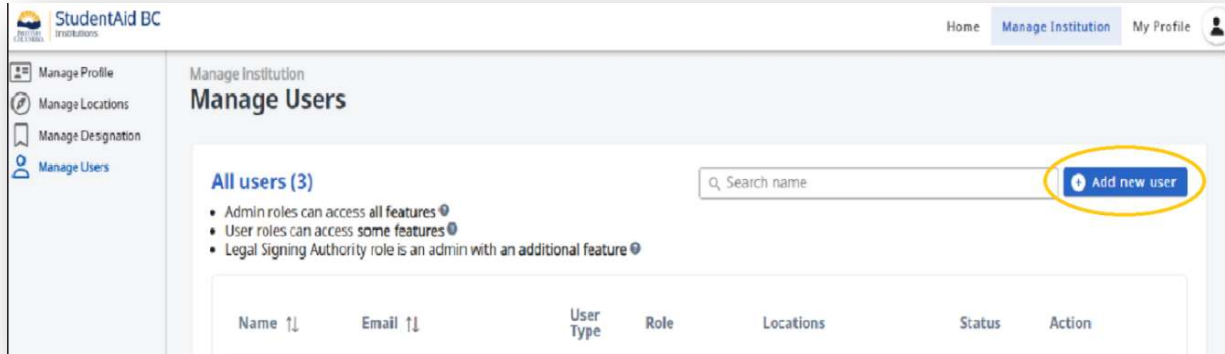
Once logged into the account click on the Manage Institution link.



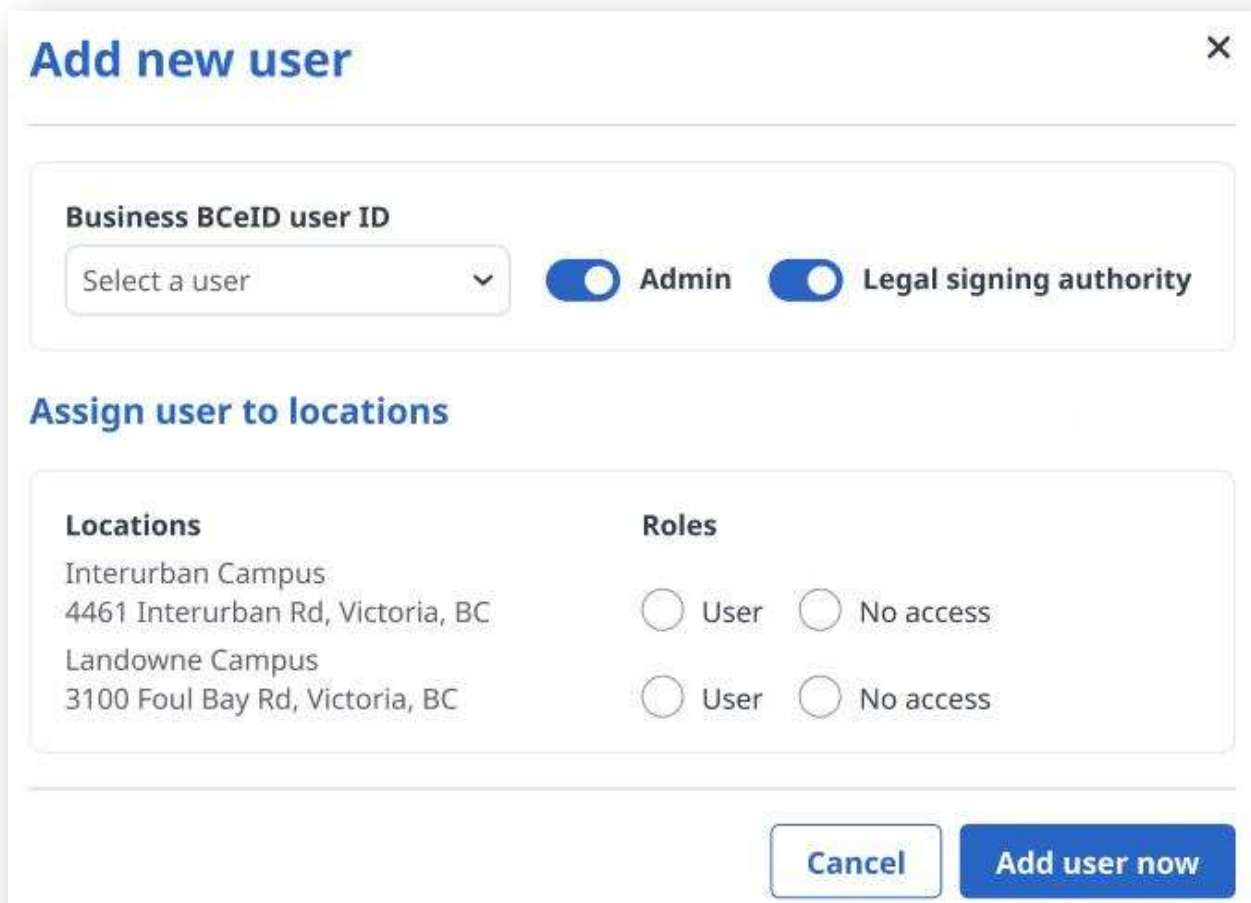
Next click Manage Users located on the left-hand side. This will take you to the manage users' page.



Click “Add new user”.



The add new user tab will pop up. You will then add the new users by selecting them from the drop-down menu. Select the role to be assigned and attach them to the appropriate locations. This information is pulled from the Business BCeID database external from SIMS.



Note: To add just a standard user you will first need to add the location that they will be attached to.

Add User for Basic BCeID

Background:

It is not possible for a user to be added by an institution using a Basic BCeID. The institution must request each user to be added directly by StudentAid BC. To request users be added you will need to send the Basic BCeID user ID, the location the user should be attached to, and their authority level to the DESIGNAT@gov.bc.ca email. StudentAid BC will review the request and then add the users.

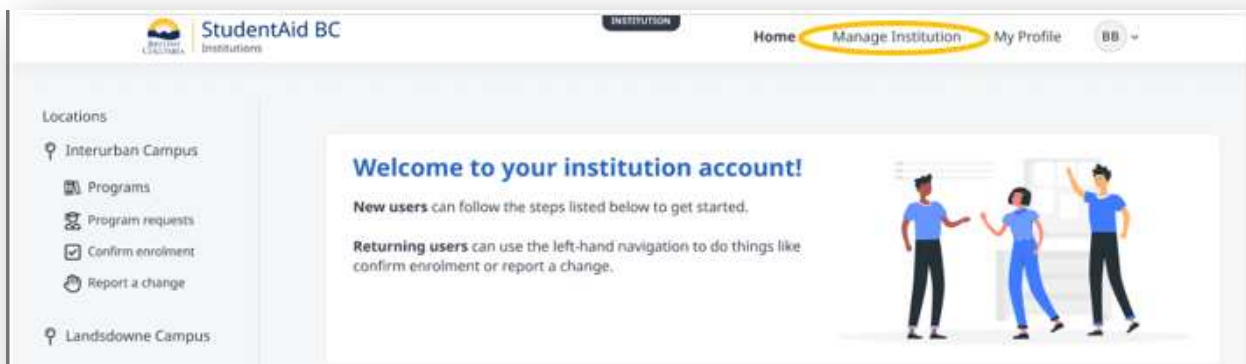
Editing Users

Background:

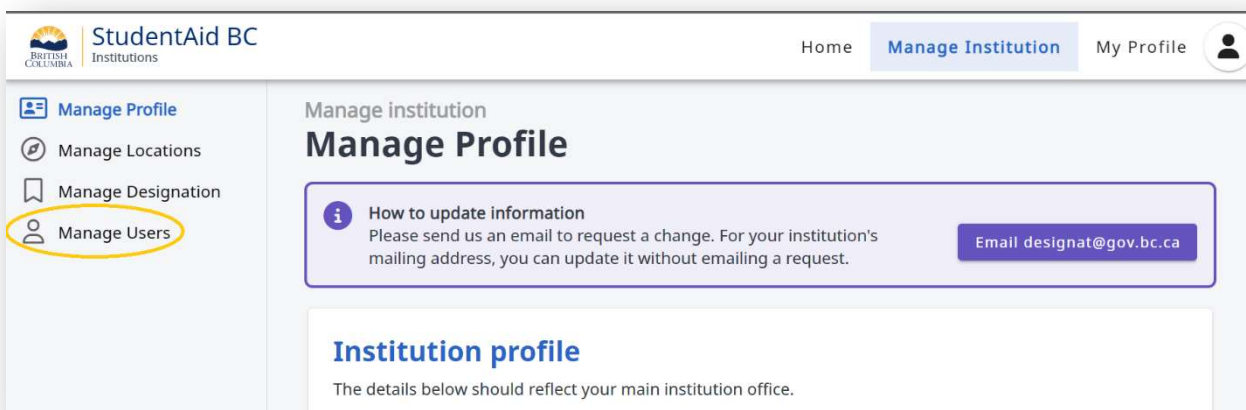
Managing users is the responsibility of the institution. The institution must maintain up to date records for each of its employees that can access the system. This includes ensuring they have the correct authorization or disabling staff members that have departed the organization.

Process:

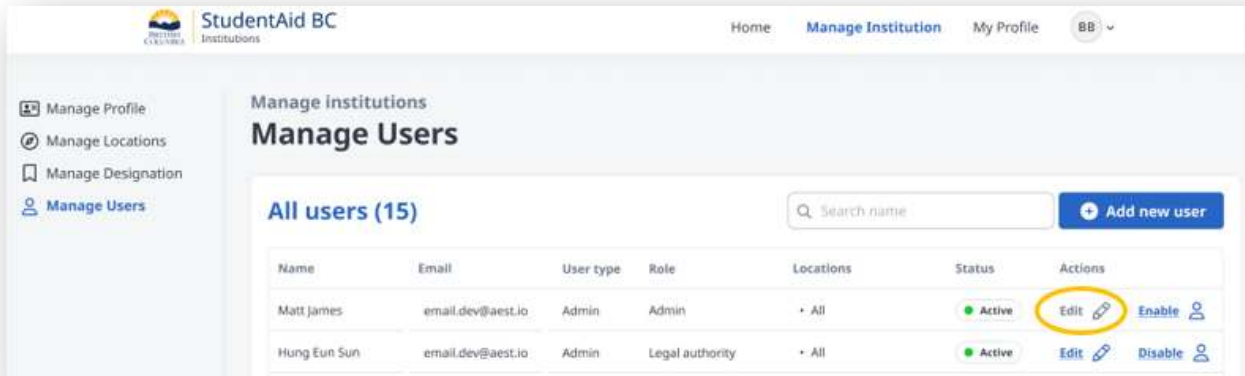
To make changes to a user an **Admin User** must access the **Manage Institution** page.



Next select **Manage Users** on the left-hand side of the page.



Then go to the user you want to change on the list and click edit.



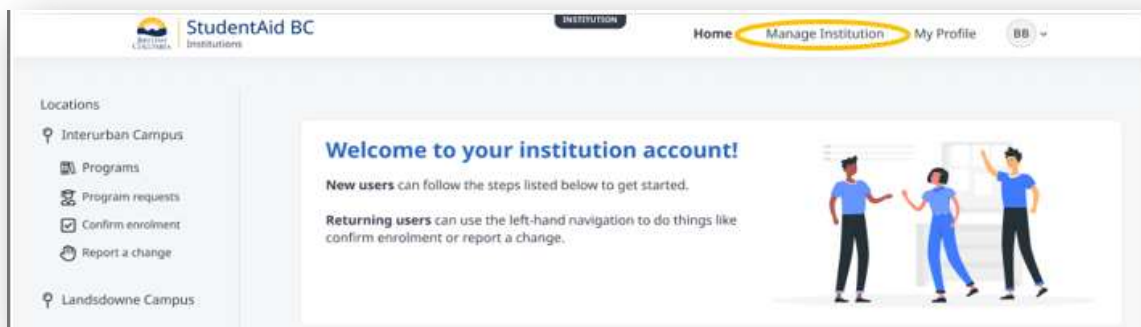
From here make the changes necessary and click “Edit user now”

Disable Users

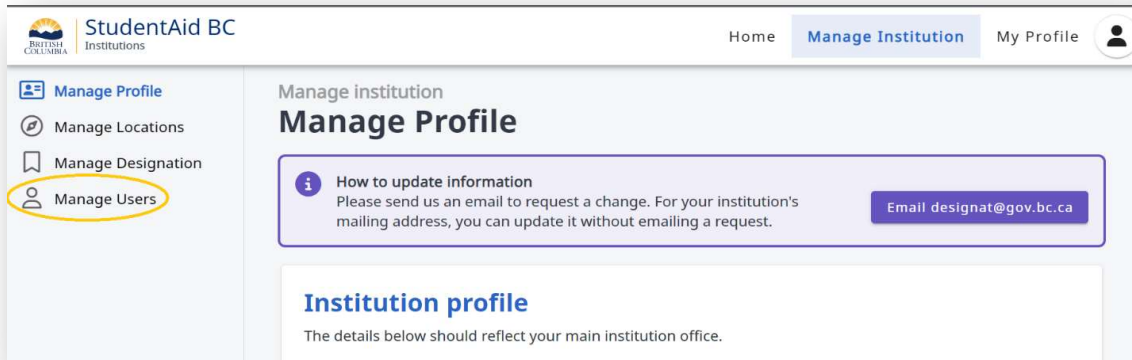
A part of the management of users requires the institution to also disable users that will no longer have permission to access the system.

Process:

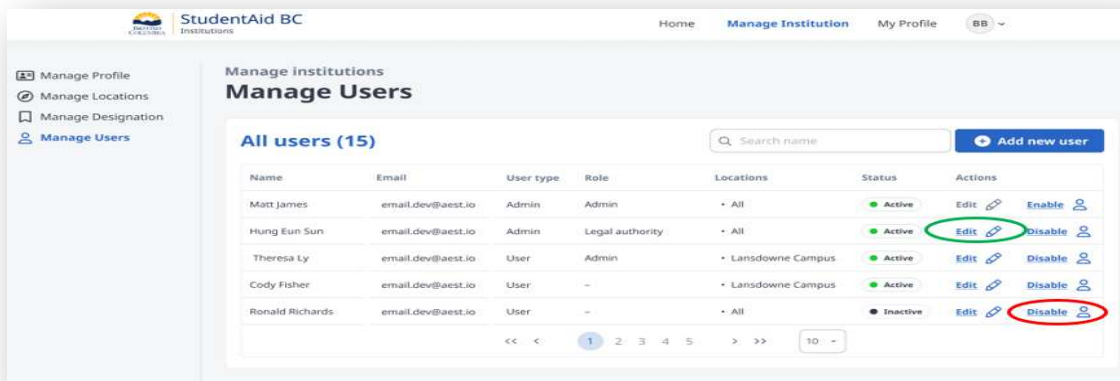
Access the **Manage Institution** page at the top right of the home page.



Click **Manage Users** on the left-hand side of the page.



Go to the user you would like to disable and click disable.



Adding Locations

Background:

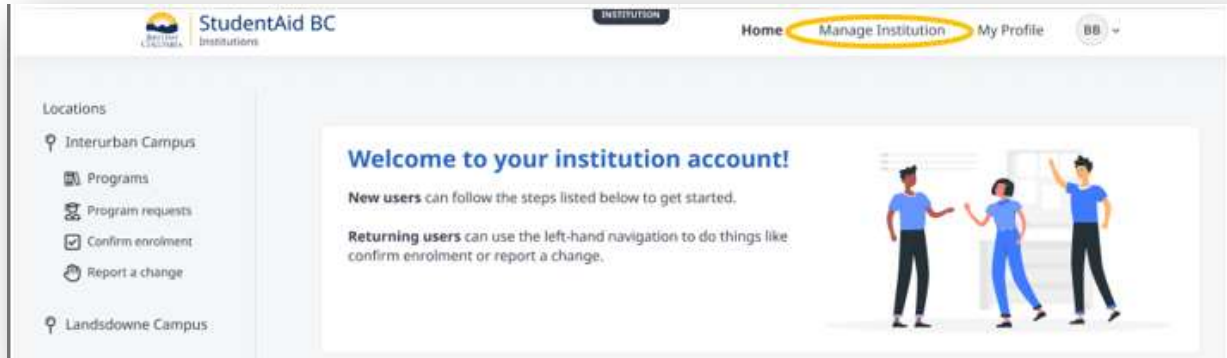
The institution is required to add each location within its institution that operates with its own unique Education Institution Code. Each location must receive its own distinct designation status with StudentAid BC before it is searchable by students during their application process.

Please see section 3.4 for more information on the designation process.

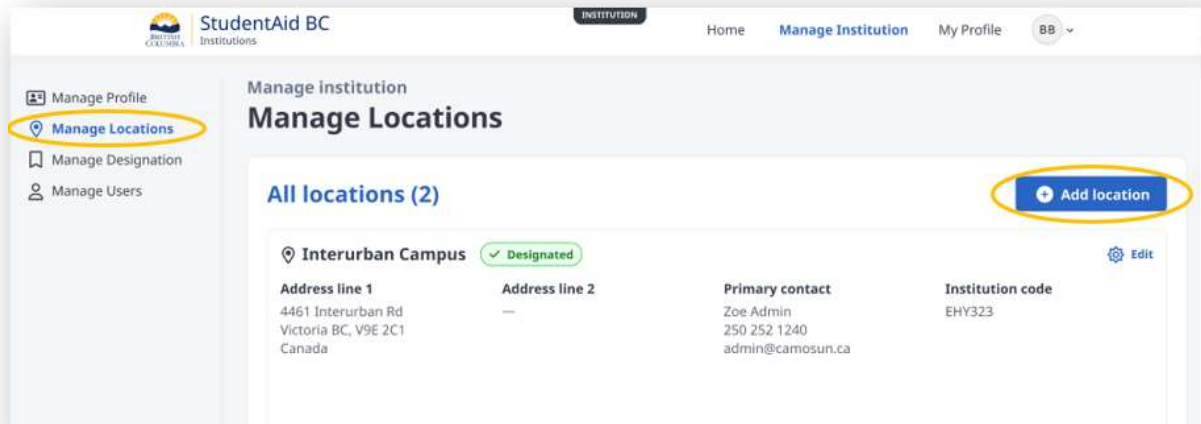
Note: Students will select only the location name during their application, not the overarching institution name. Take this into consideration when naming your locations to ensure that each location name identifies both the overarching institution name as well as the specific campus location name. For example, the Victoria campus of Sprott Shaw College may be listed as “Sprott Shaw College – Victoria Campus”.

Process:

To add a location, select **Manage Institution** to access the manage institution page.



Click on **Manage Locations** and then select **Add location**.



Enter the location information and submit.

Note: If your school is not yet designated and does not yet have a valid Institution Code (Federal Education Institution Code), use a temporary code and then contact StudentAid BC

once you have received your formal Education Institution code so that StudentAid BC can edit the code on your behalf.

Note: If BC Public schools use a singular Education Institution Code for all campuses, then only a single location should be created in SIMS.

<https://www.canada.ca/en/employment-social-development/programs/designated-schools.html>

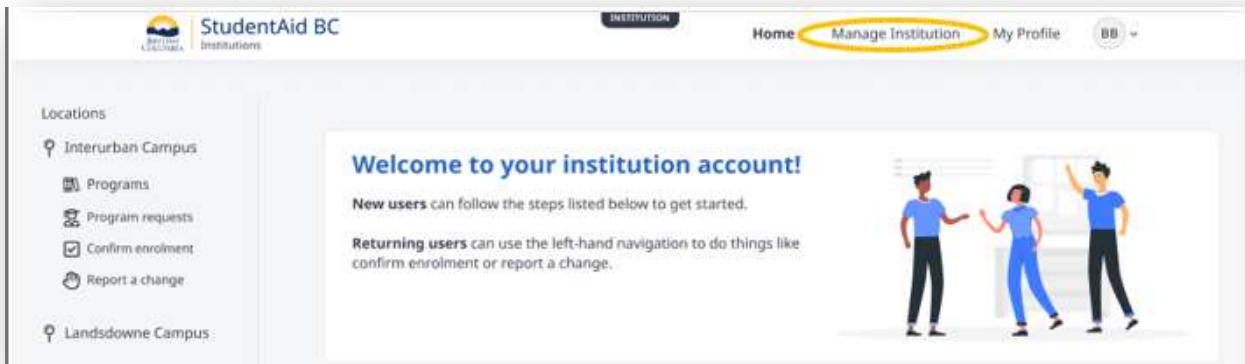
Edit Locations

Background:

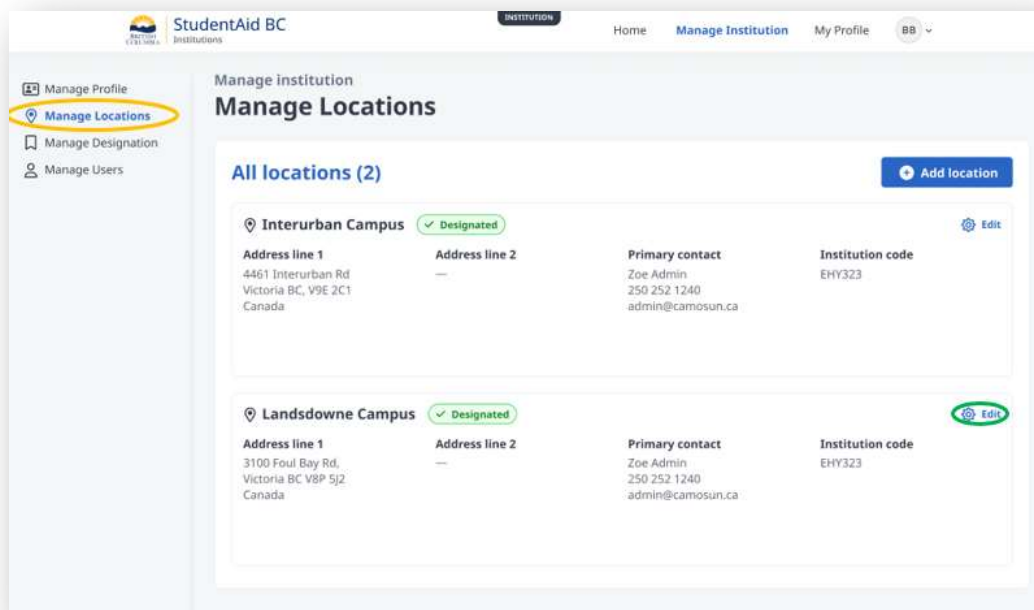
Locations may occasionally require editing. Institution users will only be able to change the location's primary contact information. If other changes are required, please email DESIGNAT@gov.bc.ca.

Process:

Select **Manage Institution** to access the Manage Institution page.



Select **Manage Locations**. Click “Edit” on the location to be changed.



Make required changes to the location Primary contact and click submit to finalize the changes.

1.4 Institution Designation

Institution Designation is the process by which post-secondary institutions are deemed eligible to administer federal and provincial student financial assistance. Designation allows students attending

colleges and universities to access financial aid programs, making education more affordable and accessible. It helps students pursue their educational goals without being burdened by excessive financial barriers.

Designation Framework

StudentAid BC institution designation is guided by the Pan-Canadian Designation Policy Framework. In 2001, provincial/territorial and federal governments developed the framework to guide institution designation policy. The policy framework is based on the principles of taxpayer protection, accountability, informed choice, and consumer protection. The framework outlines the following elements for designated institutions:

- The institution's programs meet the eligibility criteria as defined by federal, provincial, and territorial legislation with respect to post-secondary education.
- The institution is capable of appropriate administration of the student loan program and is accountable for this administration.
- The institution provides students with adequate consumer protection and information upon which to make informed choices about their post-secondary options. Designated educational institutions are expected to focus on student success, improve ways to retain students and ensure students improve their overall employability so they can repay their loans.
- The level of financial risk of designated institutions is monitored and addressed.

Designation Requests

Background:

Designation status can be obtained for all institutions through the Student Information Management System (SIMS). Institutions will submit a designation request with all required information, and this request will be manually reviewed by StudentAid BC staff before approving or declining the request. Institution users cannot 'delete' or withdraw a designation request once submitted; the request must be actioned by Ministry staff before a new designation request can be submitted. An approved designation is not required to continue setting up the institution account in SIMS. All functionality will remain available even if designation status is not requested or pending approval. However, each institution location must be approved for designation for students to be able to select that location as part of their application. When StudentAid BC staff are approving designation status for a location, they will set an effective 'end' date, after which point the school must re-submit a designation request for new approval.

B.C. Public Institution Designation

Background:

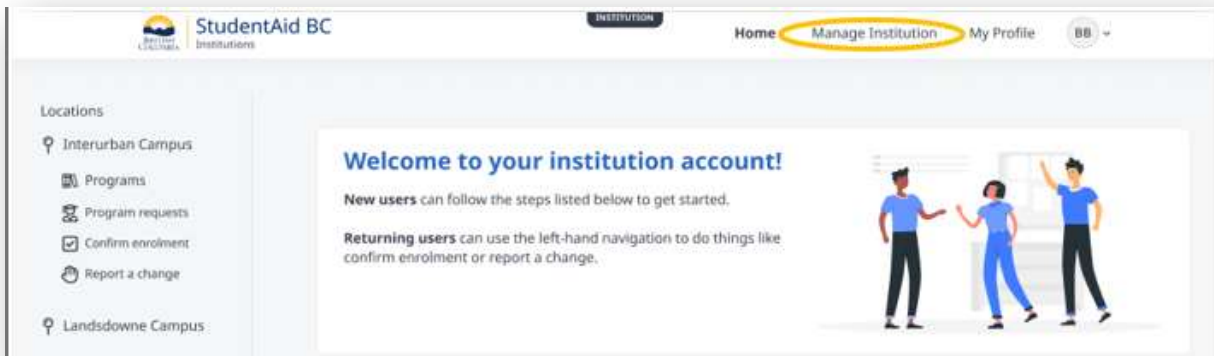
B.C. Public Institutions are designated through a Memoranda of Understanding (MOU) with StudentAid BC. BC Public Institutions must request designation in the Student Information Management System (SIMS). Requesting designation in the Student Information Management System (SIMS) must be done in

conjunction with the signing of all other associated documents. The Designation Request will not be approved until the institution returns the signed MOU to StudentAid BC for review.

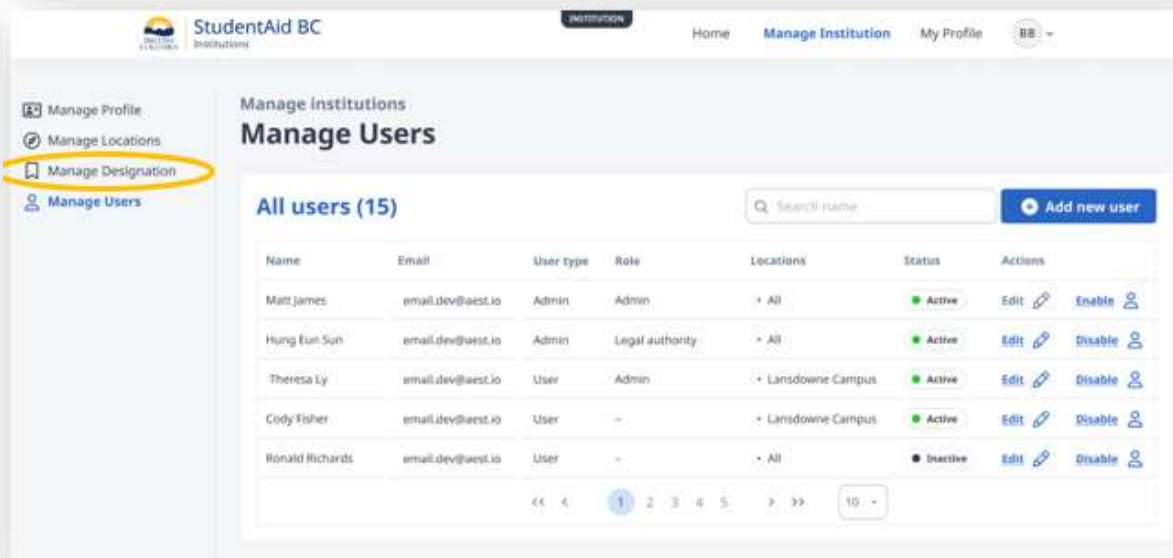
Reminder: The Legal Signing Authority user is the only one that can complete the Designation Request process.

Process:

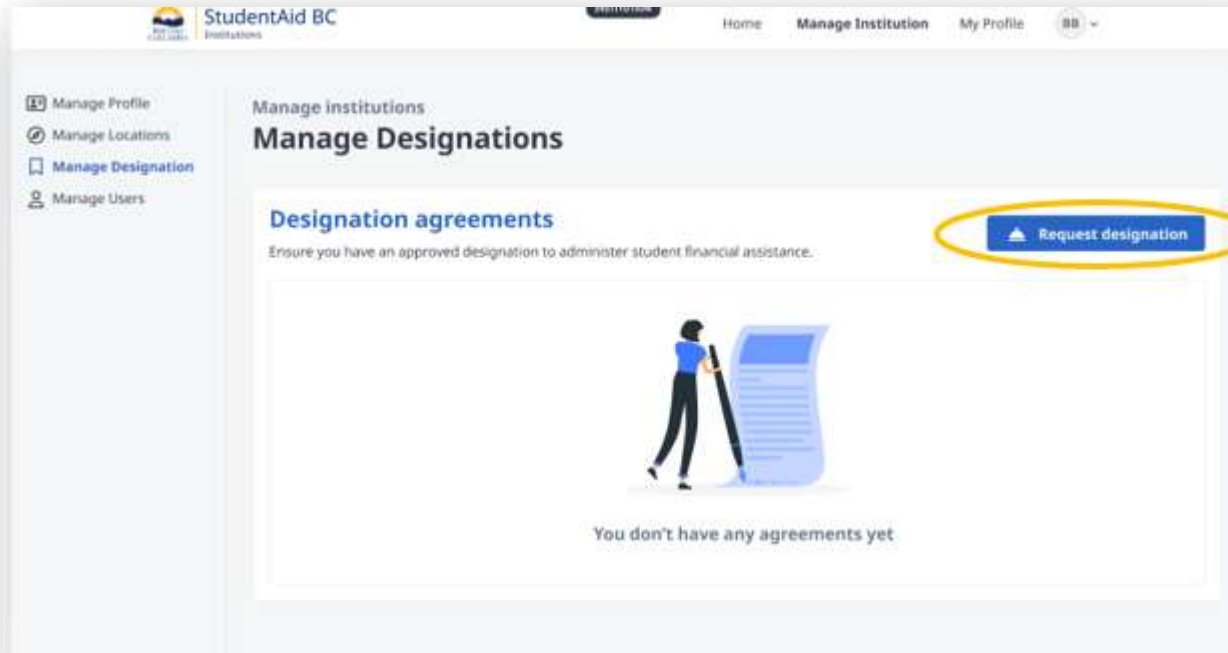
From the institution home page select **“Manage Institution”**.



Select **“Manage Designation”** on the left-hand side of the screen.



Then on the top right side of the screen select “Request designation”.



Select the location that will be included in the designation request. This is done by checking the boxes next to the location being designated and then click “Submit”.

Designation details

Institution name: Birbilopolous Institution type: BC Public

Designated locations

Request your location(s) be designated. To add locations, go to [manage locations](#).

Name	Address	Request for designation
Chewyopolous	123 birb, Vernon, BC, V1T7H6, Canada	<input type="checkbox"/>
DeathStrok University	3011 Vernon rd, Vernon, BC, V1T7H6, Canada	<input type="checkbox"/>
Houstonopolous	111 dog st, vernon, BC, V1T7H6, Canada	<input type="checkbox"/>

at least one location must be selected

Note: You can select multiple locations at a time and submit them in bulk. However, it is easier from an administrative perspective to request each location individually.

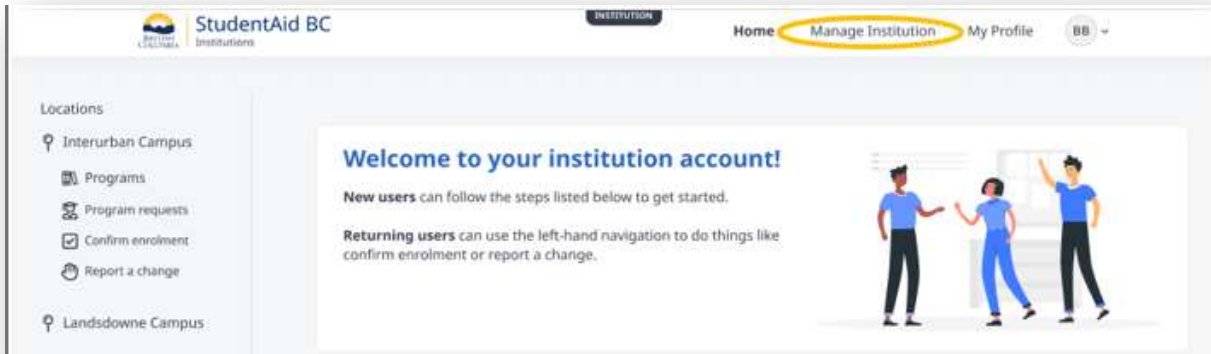
Private Institution Designation

Background:

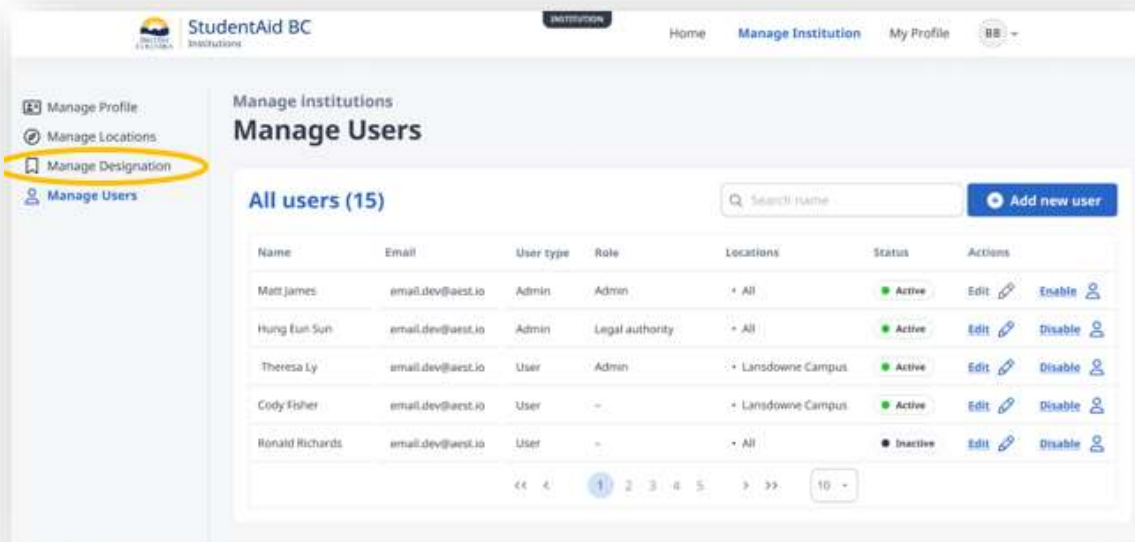
B.C. Private Institutions will be required to complete the online designation process which will walk them through the required information they must submit online in the system. For additional details on required support documentation please contact StudentAid BC at DESIGNAT@gov.bc.ca.

Process:

From the institution home page select **Manage Institution**.



Select **Manage Designation** on the left-hand side of the screen.



Select the location that will be included in the designation request. This is done by checking the boxes next to the location being designated and then click “Submit”.

Designation details

Institution name: Birbitopolous Institution type: BC Public

Designated locations

Request your location(s) be designated. To add locations, go to [manage locations](#).

Name	Address	Request for designation *
Chewyopolous	123 birb, Vernon, BC, V1T7H6, Canada	<input type="checkbox"/>
DeathStrok University	3011 Vernon rd, Vernon, BC, V1T7H6, Canada	<input type="checkbox"/>
Houstonopolous	111 dog st, vernon, BC, V1T7H6, Canada	<input type="checkbox"/>

at least one location must be selected

Cancel **Submit**

Note: You can select multiple locations at a time and submit them in bulk. However, it is easier from an administrative perspective to request each location individually.

Enter all Signing officers (eligibility and enrolment officers)

Signing officers

Add your signing and enrolment officers below. **Your eligibility and enrolment officer need to be different people.**

Eligibility officers have responsibility and authority for:

- Completing the Confirmation of Enrolment process to confirm the student's enrolment and attendance status
- Documenting the student's tuition payments to your institution
- Reporting changes to the student's scholastic standing (withdrawals, unsuccessful completion, or early completion)
- Reporting changes to course load

Name *	Position (title) *	Email *	Phone *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Add Another

Enrolment officers have responsibility and authority for:

- Completing the Program Information Requests (to help students confirm and/or locate program and study period offering information)

Name *	Position (title) *	Email *	Phone *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Add Another

Note: It is necessary to have distinct individuals serving as an Eligibility Officer and an Enrolment Officer, ensuring separation of duties and preventing conflicts of interest. By maintaining this distinction, organizations can promote transparency, impartiality, and effective management of eligibility assessment and enrollment processes.

Confirm and accept all agreement documents.

Agreement documentation

Please check each box to confirm that you have read, understood, and agreed to each Schedule:

- Schedule A * [Schedule A - StudentAid BC Policy Manuals](#)
- Schedule B * [Schedule B - StudentAid Administration Manual](#)
- Schedule D * [Schedule D - Information Sharing agreement](#)

Designation acknowledgments

A designation can only be signed by a legal authorized authority. To change or add a legal authorized authority, go to [manage users](#).

Legal authorized authority

Name

Andrew Schwenker

Email address

Andrew.Schwenker@gov.bc.ca

WHEREAS:

A The Ministry of Advanced Education ("the Ministry") is responsible for the administration of:

(a) the Canada Student Loans Program in accordance with agreements under the Canada Student Loan Act, R.S.C. 1985, c. S-23 and Canada Student Financial Assistance Act, S.C. 1994, c. 28; and

(b) the British Columbia Student Assistance Program ("StudentAid BC") authorized by British Columbia OIC 1252/2000;

B StudentAid BC financial assistance is available only to students enrolled in StudentAid BC approved programs at institutions with StudentAid BC designation;

C The Ministry designates institutions with StudentAid BC designation in accordance with the Pan-Canadian Designation Policy Framework and the StudentAid BC Policy Manual;

- By clicking the box, you confirm that you are legally authorized by the Institution to enter into an agreement on behalf of the Institution and that the Institution agrees to the terms and conditions of the Agreement.

Cancel

Submit

Select and confirm that the person signing off on the designation request has the legal signing authority to enter into an agreement on behalf of the institution and then submit.

BC Private Institution Designation Renewal

Background:

BC Private Institutions are required to renew their Designation Agreement every program year to maintain designation.

Process:

Please follow the same process as outlined for BC Private Institution Designation above.

All Other Post-Secondary Institution Designation

At this time all other institutions will complete the designation process within the SIMS system similar to how it is referenced in the “BC Private Institution Designation” section above. Schools outside of BC will simply identify the locations they wish to receive designation status and submit that for approval to StudentAid BC.

1.5 Programs

A program is defined as a course or series of courses leading to a credential. Institutions are required to report to StudentAid BC information describing each program of study as approved by the governing body overseeing the delivery of the program and/or the operation of the institution.

Adding a program

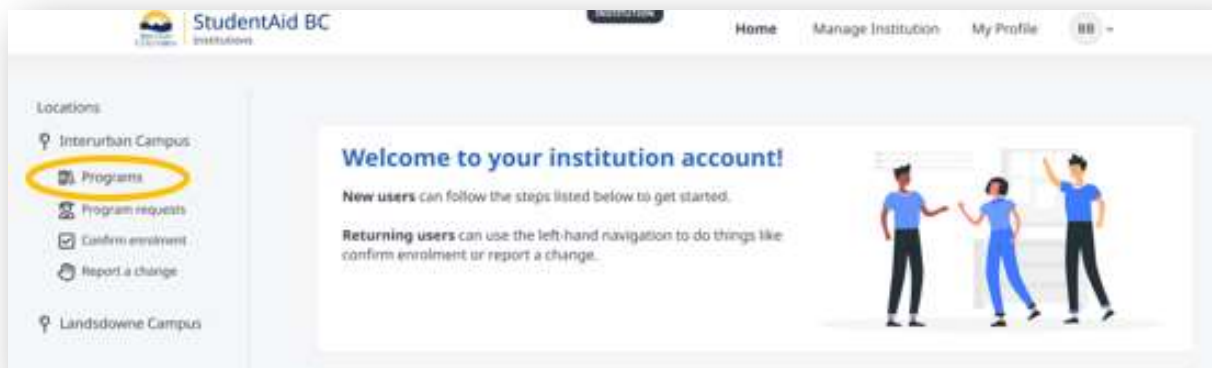
Background:

Each eligible program that is available at an institution needs to be included in the account. Programs only need to be entered once and they will remain available for all subsequent program years. Programs are automatically applicable to all locations; therefore, the location name should be specified in the program title if it needs to be differentiated across locations.

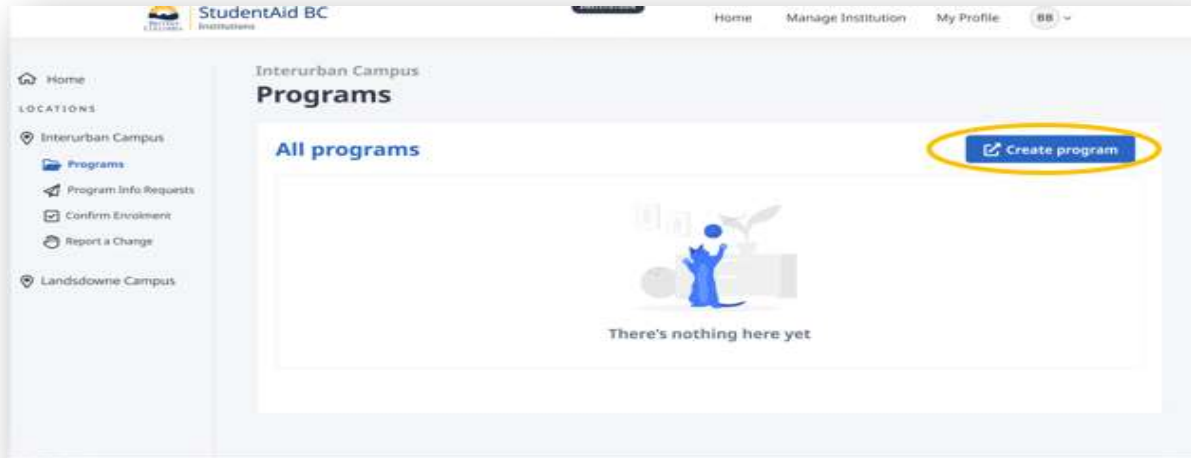
Note: At this time, programs cannot be deleted.

Process:

On the home page click on the location that you want to add the program for and then click **Programs**.



Click **Create program**.



Complete the program information fields (all fields with a red asterisk are mandatory).

A screenshot of the 'Program information' form. The form has four input fields: 'Program name *', 'Program description', 'Credential type *', and 'Classification of Instructional Programs (CIP) *'. The first, third, and fourth fields have a red asterisk indicating they are mandatory. Below the CIP field, there is a note: 'Format (##.####)'.

When you are done go to the bottom of the page and click "Submit".

Tip: The Student Aid BC Program code is optional; however, it is pre-requisite for using the Bulk Offering Upload feature.

Institution Program Code is optional as well and exists to help create unique identifiers for the programs. The program code can interact with the CIP Code and StudentAid BC Program Code for further identification.

Tip: The program description field can be used to provide information to students who are applying for funding. If you are an institution which has students applying term by term this is where you could put a

comment. If you want all students in a program, regardless of option, to apply under one code a comment can be added here. This field can be edited at any time.

Changing a program

Background:

Sometimes there will be scenarios where there will be a need to change a program. A program will be fully editable up until the first offering is submitted for that program. Once an offering is attached, there will be limitations on editing a program so as not to impact active validations of the offerings connected to the program. If there is something that you need to change that is in a locked field, you will need to change the program to DO NOT USE and create a new version of the program. It is changed in order to prevent use by future applicants but to allow for the preservation of the program for the students already using it for financial aid.

Process:

Select the program you would like to change from your list of programs.

The screenshot shows the StudentAid BC web application interface. The main heading is "Interurban Campus Programs". Below this is a table titled "All programs" with columns for CIP, Program name, Credential, Study periods, Status, and Action. The first row is highlighted with a yellow circle around the "View" button. The table contains five rows of data. At the bottom of the table, there is a pagination control showing "1" selected out of 10 items.

CIP	Program name	Credential	Study periods	Status	Action
00.0000	Practical Nursing	Associate degree	2	Active	View
00.0000	Something	Something	6	Active	View
00.0000	Something	Something	6	Active	View
00.0000	Something	Something	6	Active	View
00.0000	Something	Something	6	Inactive	View

Once selected click Edit in the top right corner of the screen.

The screenshot shows the 'Program Detail' page for 'Plumbing'. At the top right, there is an 'Edit' button circled in yellow. Below the program name, there are several fields: 'Description', 'Offering' (Full Time), 'Credential Type' (Undergraduate Certificate), 'Classification of Instructional Programs (CIP)' (12.1234), 'National Occupational Classification (NOC)', and 'Institution Program Code'. A section titled 'Study period offerings (2)' contains a table with two rows of offerings. The first row is 'Pipe Work' with study dates 'Feb 01 2023 - May 31 2023', intensity 'Part Time', offering type 'Public', study delivery 'online', and status 'Approved'. The second row is 'Plumbing FT' with study dates 'Feb 01 2023 - May 01 2023', intensity 'Full Time', offering type 'Public', study delivery 'online', and status 'Approved'. Each row has an 'Edit' link. At the bottom of the table, there are navigation arrows and a page number '1'.

You can edit any fields that are fillable on the page.

The screenshot shows the 'Edit Program' page. At the top, there is a green banner with a checkmark icon and the text: 'Students have applied financial aid for this program. You can still make changes to the program name and description without impacting the students funding. Please create a new program if you'd like to edit the other fields.' A 'Create program' button is on the right. Below the banner is the 'Program information' section with several form fields: 'Program name' (filled with 'Plumbing'), 'Program description' (empty), 'Credential type' (filled with 'Undergraduate Certificate'), 'Classification of Instructional Programs (CIP)' (filled with '12.1234', format '###.###'), 'Field of study code' (filled with '25'), 'National Occupational Classification (NOC)' (empty), and 'Format (###) Optional**' (empty).

Proceed to the bottom and click "Submit".

Note: Even if you want to apply for an exception on a denied program, you will still need to submit it here first and then contact StudentAid BC. See "Program Exceptions" for more information.

How to disable a program

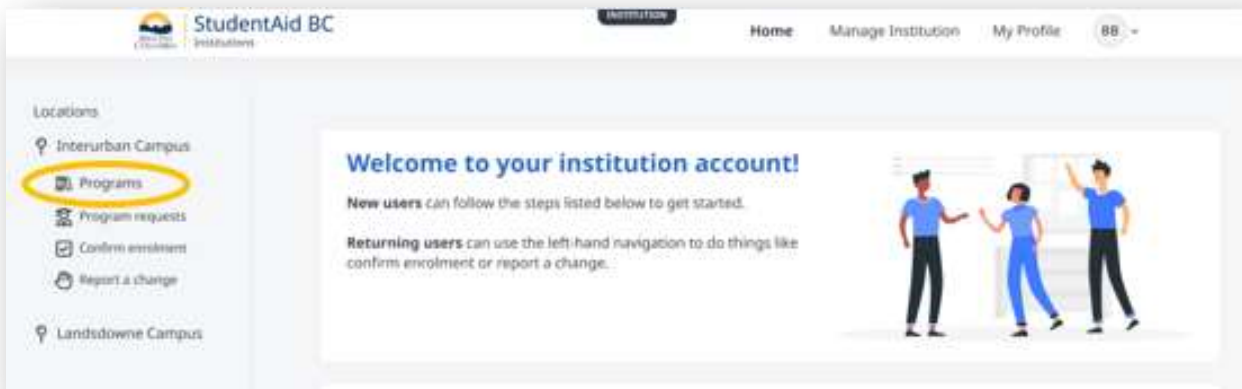
Background:

There is no function to delete or disable a program so the program should be renamed instead. The program name will need to be changed to show DO NOT USE.

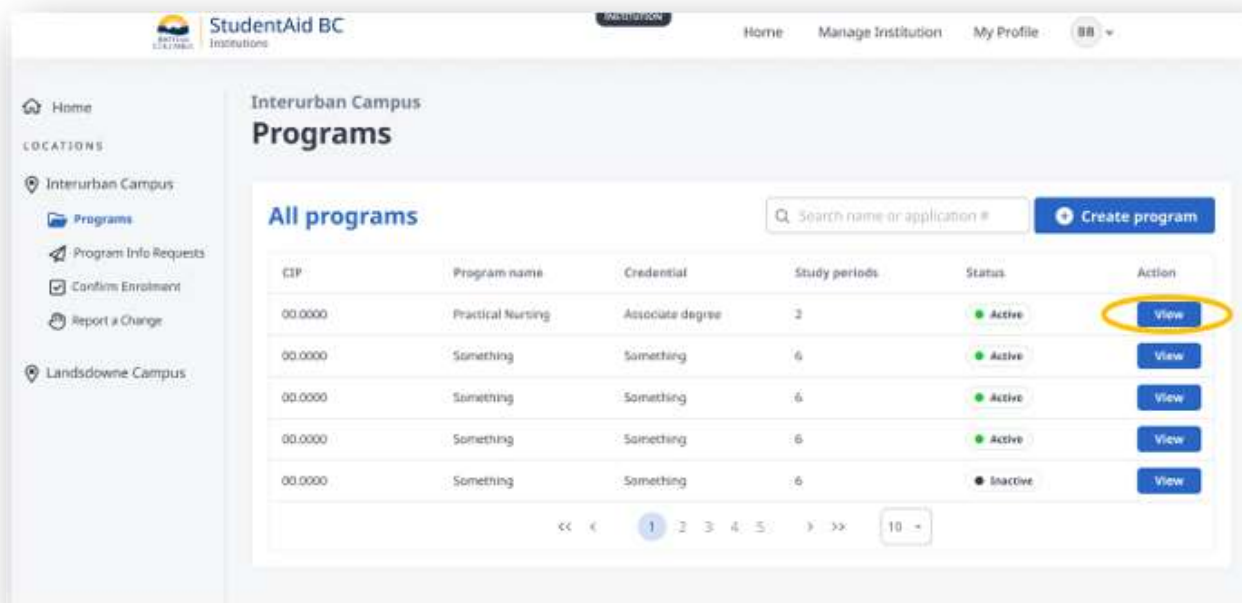
Note: Students will see the updated version of the program name on any assessments that already exist for that program.

Process:

Select **Programs** under the location that holds the program to be disabled.



Find the program to be disabled from the list of programs and click **View**.



Click **Edit** in the top right corner of the program details page.

The screenshot shows the 'Program Detail' page for 'Plumbing'. At the top right, there is an 'Edit' button circled in yellow. Below the program name, there is a status indicator 'Approved'. The page is divided into sections: 'Description', 'Offering' (Full Time), 'Credential Type' (Undergraduate Certificate), 'Classification of Instructional Programs (CIP)' (12.1234), 'National Occupational Classification (NOC)', and 'Institution Program Code'. Below these sections is a 'Study period offerings (2)' table with a search bar and an 'Add offering' button. The table has columns for Name, Study Dates, Intensity, Offering type, Study delivery, Status, and Action. Two offerings are listed: 'Pipe Work' and 'Plumbing FT', both with 'Approved' status and an 'Edit' link.

Add **DO NOT USE** to the front of the program name.

The screenshot shows the 'Program Detail' page for 'z- DO NOT USE Joinery'. The page header includes the 'StudentAid BC Institutions' logo and a 'Home' link. The program name is 'z- DO NOT USE Joinery' with an 'Approved' status indicator. The 'Description' section contains the text: 'DO NOT USE Joinery is now listed as Carpentry. Students should apply under that program name.' The 'Offering' section is 'Full Time'. The 'Classification of Instructional Programs (CIP)' and 'National Occupational Classification (NOC)' sections are also visible.

Tips: If you want the program to show at the bottom of the program list you can add “z-” to make the program appear at the end as the list is alphabetical. The comment field of the program can also be used, if applicable, to advise students what to do: ex. “Joinery is now listed as Carpentry. Students should apply under that program name”.

Program Exceptions

Background:

When submitting programs that do not comply with all of StudentAid BC policy, warning messages will appear in the interface indicating that the program is ineligible for funding. These messages mean the program will not automatically get approved, but the program can still be submitted for manual review by StudentAid BC staff. Any programs requiring manual review and policy exceptions will be listed as 'pending' until they are approved or denied by Ministry staff. While a program is pending, it is not viewable by students.

Process:

Upon submitting a program which enters 'pending' status, you will need to email DESIGNAT@gov.bc.ca and will need to include the program information including which location it is for so that there are no errors on where the program is approved. You will also need to include information that supports the case for approving the program. This can include special circumstances, historical approvals, or any other documentation that supports StudentAid BC's review process.

1.6 Program Offerings

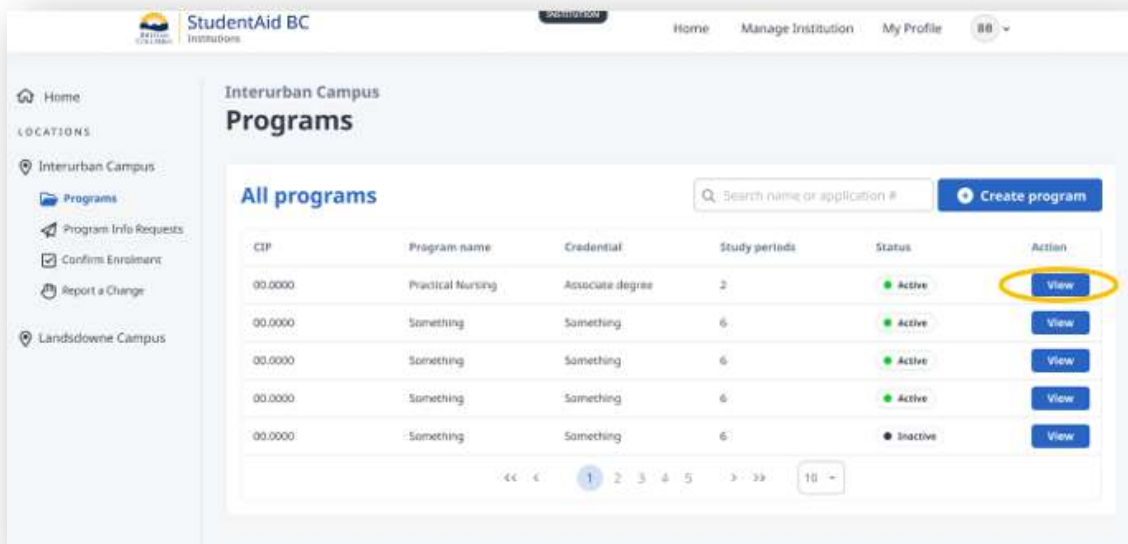
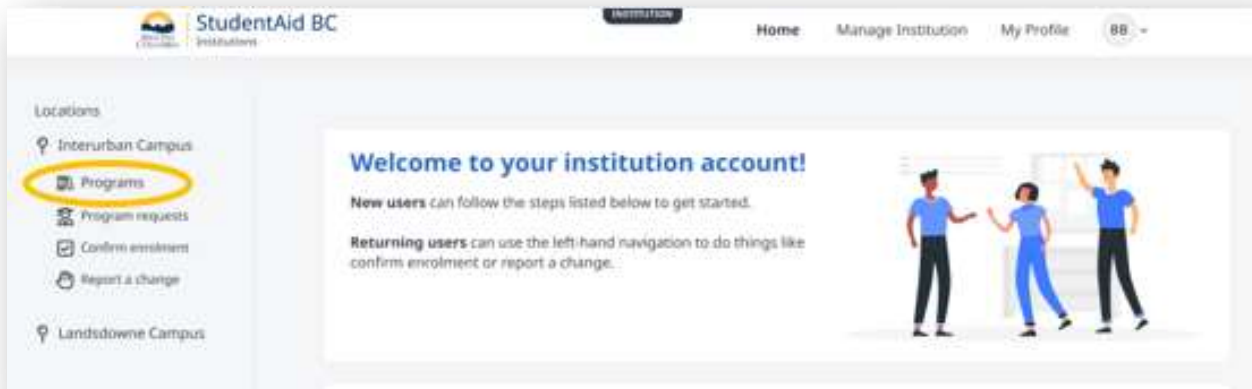
Adding an Offering

Background:

An "offering" refers to a specific period when a program is available for students to participate in. Each offering has its own start and end dates and may be offered in different formats (i.e. online or in-person). An offering is when students can join and take part in a particular program for a set period and be eligible for financial aid. It is important to note that offerings are program year specific and will not carry over to future program years and will need to be added to the relevant programs each year. Offerings are also location specific and will only appear to students attending the location the overarching program is attached to (this differs from the programs that show to all institution staff across all locations).

Process:

First access the **Programs** list.



Find the program that the offering will be added to from the list and click **View**.

Click on **Add offering**.

The screenshot shows the 'Program Detail' page for 'Psychology' on the StudentAid BC website. The page includes a navigation bar with 'Home', 'Manage Institution', and 'My Profile'. Below the program name, there is a status indicator 'Approved' and an 'Edit' button. The program details are organized into three columns: Description (dvsd), Offering (Full Time, Part Time), and Credential Type (Graduate Diploma). Below this, there are three rows of information: Classification of Instructional Programs (CIP) 12.3456, National Occupational Classification (NOC), and Institution Program Code ABCV. A section titled 'Study period offerings (2)' contains a search bar and a circled 'Add offering' button. Below this is a table with columns for Name, Study Dates, Intensity, Offering type, Study delivery, Status, and Action. The table lists two offerings: 'Fall 2023 Semester (Sep 1 - Dec 1)' and 'hugh's PIR request', both with 'Approved' status and 'Edit' links. A pagination control at the bottom shows page 1 of 10.

Complete the offering information in its entirety. (Red asterisks indicate mandatory fields)

Tuition and mandatory fee amounts must be separated for all offerings. Do not combine the tuition and mandatory fees and enter sum total in tuition and leave mandatory fees as \$0.

Note: Exceptional expenses are only relevant for full-time offerings. For part-time offerings indicate \$0.

Then select **Validate** - this will check for any errors in the offering before it is submitted. After the validation is confirmed select “Submit” and the offering will be created.

Study costs
Please add the costs for each section (use 0 if there are no costs)

Tuition *
\$

Mandatory fees *
\$

Program related costs *
\$

Exceptional expenses *
\$

Study period availability

Do you want to add this study period for all students to select? *

Yes, this offering is for all students

No, this offering is for a specific student

Declaration

All information is subject to verification and auditing.

I confirm this study period offering meets the policies outlined in the StudentAid BC policy manual.*

Cancel Validate Add offering now

Note: The ‘study period availability’ section allows for an offering to be listed publicly for all students or kept private so that schools can assign it to particular students at their discretion during the Program Information Request process. (See Program Information Request section for more details)

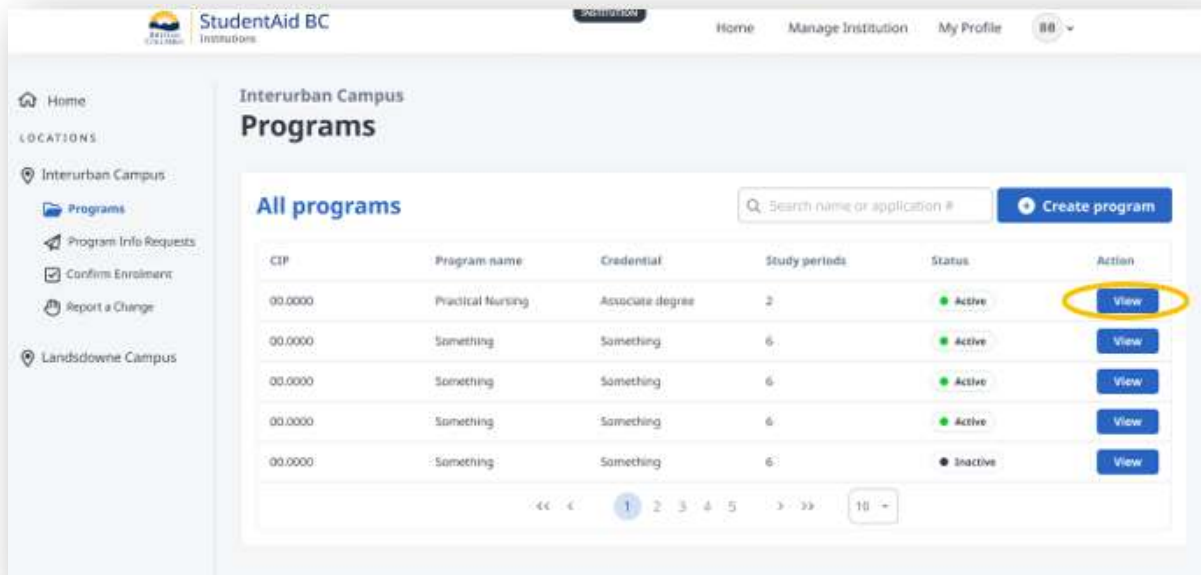
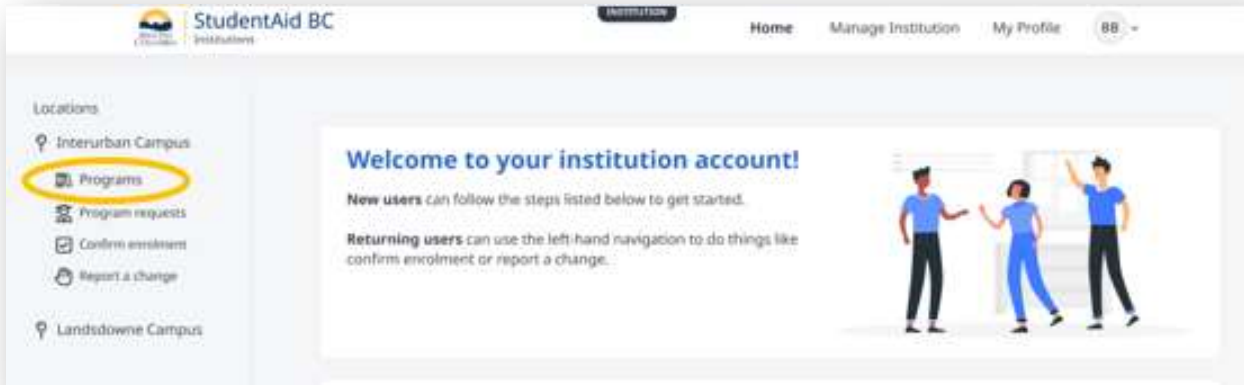
Changing an Offering

Background:

Sometimes there will be scenarios where there will be a need to change an offering. Please note that once the offering has a submitted application for financial aid there will be limitations on how much of the offering can be edited so as not to impact active applications. If there is something that you need to change that is in a locked field, you will need add DO NOT USE to the start of the offering name and create a new version of the offering for future applicants.

Process:

First, click on **Programs** to access the program that has the offering you want to change.



Click **Edit** next to the offering that you would like to change from the list of offerings.

← Programs
Program Detail
Submitted: Feb 22 2023 | Institution name: Birbilopolous

Plumbing Edit

Approved

Description: Offering: Full Time; Credential Type: Undergraduate Certificate

Classification of Instructional Programs (CIP): 12.1234; National Occupational Classification (NOC); Institution Program Code

Study period offerings (2) Add offering

Name	Study Dates	Intensity	Offering type	Study delivery	Status	Action
Pipe Work	Feb 01 2023 - May 31 2023	Part Time	Public	online	Approved	Edit
Plumbing FT	Feb 01 2023 - May 01 2023	Full Time	Public	online	Approved	Edit

Note: Changes will only be available to all fields until the first application is submitted using that offering.

Bulk Offering Upload

Background

In addition to individual program uploads, a convenient feature allows for bulk uploading of program offerings. This process entails using the institution account to upload a spreadsheet that has been specifically created by StudentAid BC. Only the Account Administrator role can upload a bulk offering document. By utilizing this streamlined approach, institutions can efficiently manage and update multiple program offerings, saving time and effort in the process. The spreadsheet and additional resources for completing this process will be made available on the StudentAid BC website.

Process:

To submit the bulk upload, access the institution portal and select **Manage Institution**.

StudentAid BC

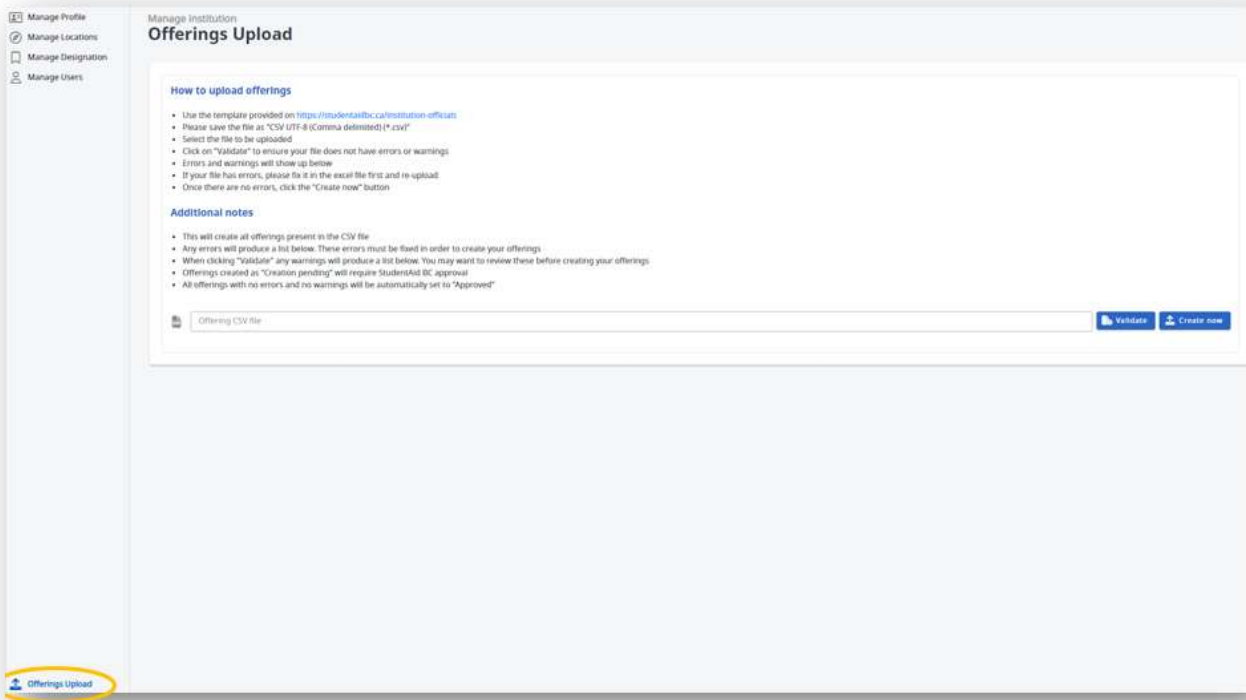
Home **Manage Institution** My Profile

Welcome!

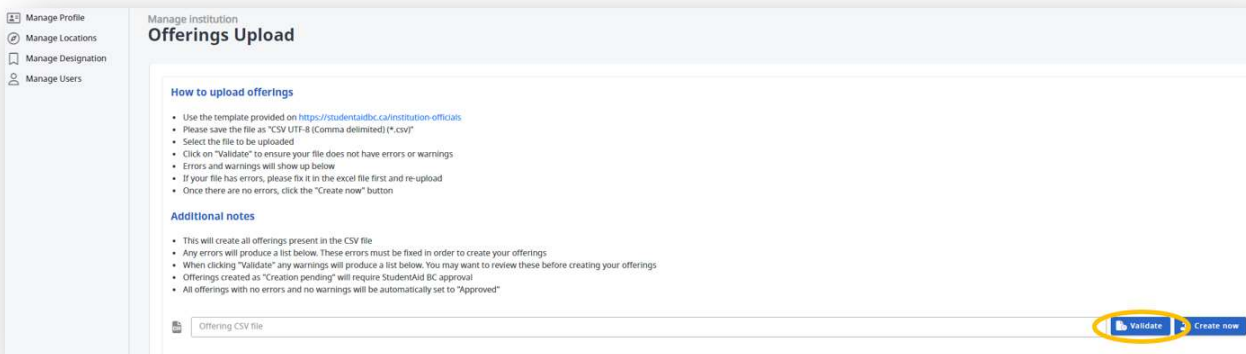
Here you will find features to:

- Add programs and study period offerings
- Complete program info requests
- Confirm enrolments and view upcoming enrolments
- Report a change for scholastic standing
- Manage your institution profile, locations, users, and designations (admins only)

On the bottom left of the screen click **Offerings Upload**.



Follow the instructions on how to upload the spreadsheet. Click **Validate** to check for errors or warnings. Errors are critical and will not allow submission of the document. Warnings are policy-based issues which will put the pertinent offering into the pending status upon creation. If there are no errors, click **Create Now** to submit the document.



Note: If you want to add more program offerings using this method, make sure you don't include the ones that were already uploaded before. Only include new offerings in your additional uploads to avoid repeating the same information.

Offering Exception Requests

Background:

Institutions will occasionally have programs or study period offerings flagged as ineligible during the 'create program' or 'add offering' activities, i.e., when the program or offering does not meet the built-in policy validations. The institution can request a review if a program or offering is flagged as ineligible.

Process:

You will need to email DESIGNAT@gov.bc.ca and will need to include the offering information. You will also need to include information that supports the case for approving the offering on review. This can include special circumstances, historical approvals, or any other documentation that supports StudentAid BC's review process.

1.7 Program Information Record (PIR)

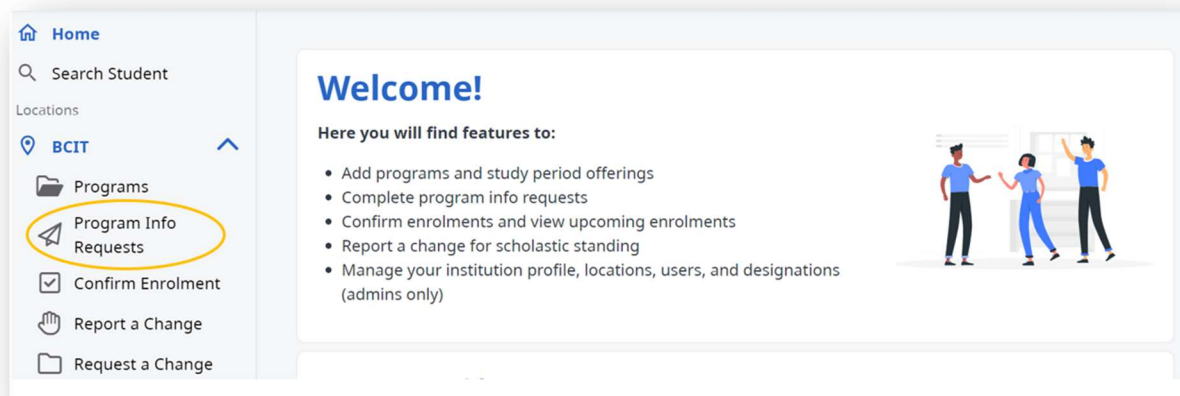
Background:

The Program Information Record (PIR) process is used to create an offering for a student, full-time or part-time, which the institution may not wish to display for all students to select.

Full-Time Program Information Request

Process:

From the home page select **Program Info Requests**:



Select the Program Information Request you wish to **View**:

The screenshot shows the BCIT Program Information Requests interface. On the left is a navigation menu with options: Home, Search Student, Locations (BCIT), Programs, Program Info Requests (highlighted), Confirm Enrolment, Report a Change, and Request a Change. The main content area is titled 'BCIT Program Information Requests' and features a section for 'Active applications (3)'. Below this is a table with the following data:

Name	Study Period	Application #	Status	Action
Becky Holmes	-	2023000649	Required	View
Becky Birbilis	-	2023000655	Required	View
Becky Birbilis	Sep 05 2023 - Dec 13 2023	2023000650	Completed	View

Review the Program Information Request to determine if required.

The screenshot shows the details for a Program Information Request. It includes the following information:

- Study dates:** Aug 28 2023 - Dec 04 2023
- Offering intensity:** Full Time (circled in yellow)
- Deny program information request
- Program ***: Finance
- Offering ***: search for the offering

If the Program Information Request is not required, then it can be denied along with the reason. If it is required, an entry must be made on the Program Offerings page. To do this go back to the main screen and select **Program Offering**:

BCIT Programs

All programs (14) Search Program Create program

CIP	Program Name	Credential	Study periods	Status	Action
11.0304	Interior Design Fundamentals	undergraduateCertificate	7	Approved	View
52.0801	Finance	undergraduateDiploma	5	Approved	View
51.0103	Clinical Genetics	undergraduateDiploma	2	Approved	View

Select the program you wish to complete the Program Information Record for.

Add the offering by clicking **Add offering**.

Study period offerings (5) Search Offering Name Add offering

Name ↑↓	Study Dates	Intensity	Offering type	Study delivery	Status	Action
BB A0124535	Sep 05 2023 - Dec 13 2023	Part Time	Private	blended	Approved	Edit
level 1	Sep 05 2023 - Dec 31 2023	Full Time	Public	blended	Approved	Edit
level 2	Jan 03 2024 - May 24 2024	Full Time	Public	blended	Approved	Edit

Add the offering information.

Study period
Students will see the program name, description, and credential type including your study period name, dates, and year of program.

Name *
B.B. A01034699 (FT)

Please include the institution location, year of study, and cohort details directly into the name of the offering so that students can differentiate it from other similar offerings.

Year of study *
Year 1

Display this to students

How will this be offered? *

Part time
 Full time

Note: Institutions may wish to consider how they name a study period for a student to assist in making it easier to link to the student.

Under study period availability click “No”.

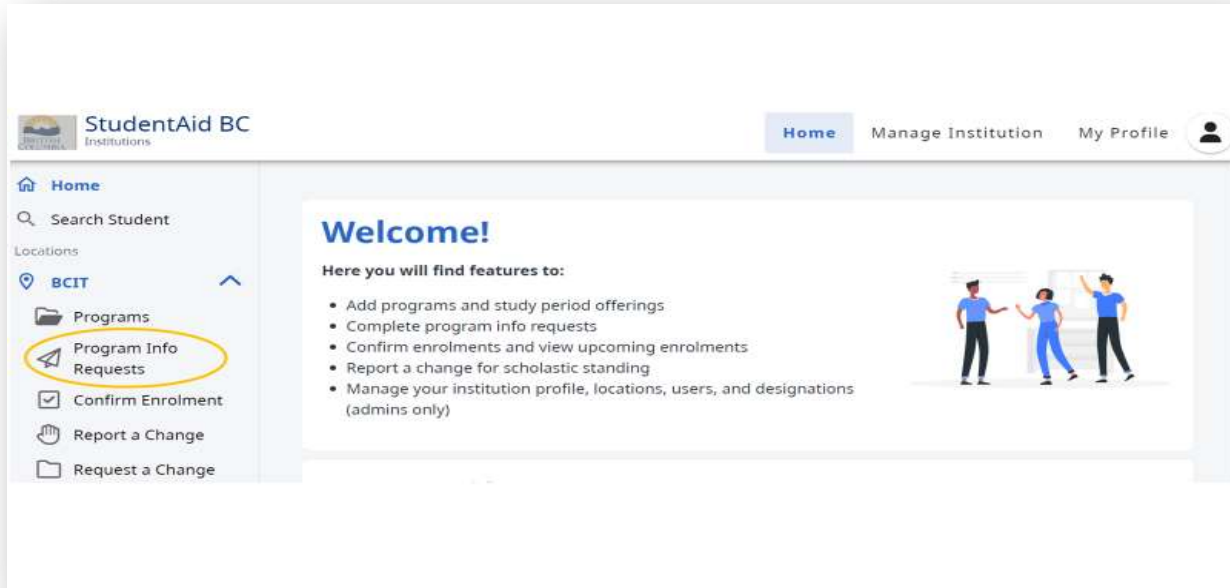
Tuition * \$ 3,000	Books and Supplies * \$ 600
Mandatory fees * \$ 480	Exceptional Costs * \$ 0

Study period availability

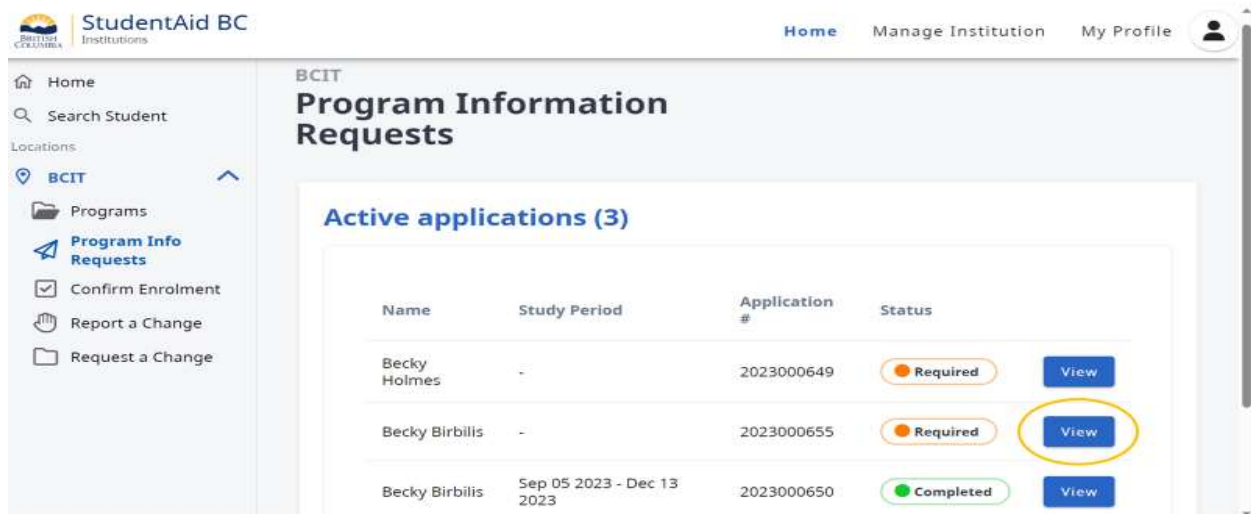
Do you want to add this study period for all students to select? *

Yes, this offering is for all students
 No, this offering is for a specific student

Once the offering is saved go back to the home page and return to the **Program Information Request** page.



Select the student record you wish to complete the Program Information Record.



In the student's Program Information Request select the Study Period Offering you created.

StudentAid BC Institutions

Home Manage Institution My Profile

Home Search Student

Locations

- BCIT
- Programs
- Program Info Requests**
- Confirm Enrolment
- Report a Change
- Request a Change

BCIT Program Information Requests

Active applications (3)

Name	Study Period	Application #	Status	
Becky Holmes	-	2023000649	Required	View
Becky Birbilis	-	2023000655	Required	View
Becky Birbilis	Sep 05 2023 - Dec 13 2023	2023000650	Completed	View

Program description
Finance

Study dates
Aug 28 2023 - Dec 04 2023

Offering intensity
Full Time

Deny program information request

Program *
Finance

Offering *
B.B. A01034699 (FT) (Aug 28 2023 - Dec 04 2023)

Submit the record by clicking on **Complete program info request**.

Program *
Finance

Offering *
B.B. A01034699 (FT) (Aug 28 2023 - Dec 04 2023)

or

If program or study period does not exist
If the program the student would like to attend does not exist in StudentAid BC, you will need to create an approved program and offering entry.

[+ Create program](#)

[Cancel](#) [Complete program info request](#)

Part-time Program Information Request

The Part-time Program Information Request follows the same process. This information is the same as what was previously gathered on the part-time paper application.

Provided by the student

Program name
Interior Design Fundamentals

Program description
Interior Design Fundamentals

Study dates
Feb 01 2024 - Mar 14 2024

Offering intensity
Part Time

Course name painting 101 12356	Course dates Mar 01 2024 - Jul 01 2024
Course name swatching 12356	Course dates Jun 03 2024 - Oct 04 2024

Study period offerings (6) + Add offering

Name ↑↓	Study Dates	Intensity	Offering type	Study delivery	Status	Action
A.B. A00347654 (PT)	Sep 17 2023 - Nov 12 2023	Part Time	Private	blended	Approved	Edit
C.R. A01045364 (FT)	Sep 18 2023 - Dec 17 2023	Full Time	Private	blended	Approved	Edit
Level 1	Sep 05 2023 - Nov 30 2023	Full Time	Public	blended	Approved	Edit
Level 2	Jan 03 2024 - Mar 30 2024	Full Time	Public	blended	Approved	Edit
Level 3	Apr 15 2024 - Jul 26 2024	Full Time	Public	blended	Approved	Edit

Tip: The Program Information Request (PIR) can only sort by study period name. If institutions anticipate having multiple PIR's for full-time and part-time you may wish to consider naming conventions that support searching by intensity.

Classification of Instructional Programs (CIP) 10.1033 National Occupational Classification (NOC) Institution Program Code PCB8

Study period offerings (2) + Add offering

Name ↑↓	Study Dates	Intensity	Offering type	Study delivery	Status	Action
A.B. A00347654 (PT)	Sep 17 2023 - Nov 12 2023	Part Time	Private	blended	Approved	Edit
S.W. A00123456 (PT)	Sep 15 2023 - Dec 14 2023	Part Time	Private	blended	Approved	Edit

<< < 1 > >>