

End of Year Monitoring of Higher Education Enrolments (EYM) 2023/24 and outcomes of consultation of changes to EYM for 2023/24

Date: 16 August 2024

Reference: Medr/2024/00

To: **Heads of higher education institutions in Wales**
Principals of directly-funded further education institutions in Wales

Respond by: 13 December 2024

More information:

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This publication gives definitions and guidance to higher education providers relating to the end of year data that are extracted from the 2023/24 HESA student record. It also summarises the outcomes of the consultation on changes to end of year monitoring for 2023/24.

The extraction is performed via the HESA Information Reporting Interface Service (IRIS) and will be used to calculate part-time undergraduate credit based funding and the higher cost subjects premium for 2025/26, calculate any adjustment to the 2023/24 part-time undergraduate credit based teaching funding, monitor medicine and dentistry provision and establish final numbers of students and credit values at providers for 2023/24.



Introduction

1. This publication gives definitions and guidance to higher education institutions (HEIs) and further education institutions (FEIs) with higher education provision (known collectively as higher education (HE) providers) that were funded directly by the Higher Education Funding Council for Wales in 2023/24 and are now funded by the Commission for Tertiary Education and Research (Medr). The guidance relates to the end of year data that are extracted from the 2023/24 Higher Education Statistics Agency (HESA) student record via the HESA Information Reporting Interface Service (IRIS) to enable Medr to:
 - a) Calculate funding allocations for part-time undergraduate credit based funding and the higher cost subjects premium for 2025/26;
 - b) calculate any adjustments to 2023/24 part-time undergraduate credit based funding;
 - c) monitor provision of medicine and dentistry courses;
 - d) establish final numbers of students and credit values at HE providers for 2023/24 for funding modelling and information purposes.

Main changes for 2023/24

2. HEFCW reviewed the extraction and presentation of the end of year monitoring data earlier this year in HEFCW circular [W24/10HE: End of Year Monitoring of Higher Education Enrolments – consultation on changes for 2023/24](#). Annex M summarises the outcomes of that consultation and the actions taken or to be taken as a consequence. The main changes made since the EYM 2022/23 survey are as follows:
 - a) In 2023/24, HEFCW was responsible for funding provision at HE providers. However, HEFCW is now part of Medr and HEFCW no longer exists as an organisation. Therefore, throughout the circular, references to HEFCW have been updated to Medr, and any references to Medr should be assumed to also cover the previous arrangements under HEFCW. In particular, Medr-fundable has replaced HEFCW-fundable and for the purposes of this document includes provision funded by HEFCW in 2023/24;
 - b) Annex K has been updated to reflect the mapping included in the consultation document, with some amendments as a result of the consultation;
 - c) Annex A, which provides a summary of the EYM guidance, has been updated to include any changes made to the rest of the guidance in this circular;
 - d) Tables 2a to 2c and 6 have been removed from the extraction. This means that tables previously labelled Tables 3, 4 and 5 have become Tables 2, 3 and 4 respectively, and guidance has been updated to reflect this. See Annex J. References and guidance relating to Tables 2a, 2b, 2c and 6 have been removed from all annexes;
 - e) There is only one sign off sheet for the EYM outputs for 2023/24, relating to Tables 1a to 1c. In addition, there is now an 'Explanations' sheet contained within the EYM workbook in the IRIS report. Providers should use this sheet to

provide any explanations of highlighted changes between 2022/23 and 2023/24;

- f) Changes have been made to the template used to present the extracted data to reflect the outcomes of the consultation. See Annex O;
- g) The Excel workbook containing the extracted data output in the IRIS system, now includes data from the previous two EYM data extractions;
- h) As an additional annex, Annex M, has been included, Annexes M and N in EYM 2022/23 have been renamed N and O respectively for 2023/24.

Contents

3. This circular provides:
 - a) guidance and definitions for the various categories used to classify students;
 - b) information about the criteria used to extract EYM data from the 2023/24 HESA student record via IRIS;
 - c) details of the sign off arrangements for the tables made available through HESA IRIS outputs (see paragraph 10 for the list of tables requiring sign off).

4. The contents of the annexes are as follows:

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Adjustment of 2023/24 funding

5. For the purposes of calculating the funding consequences of under-recruitment for 2023/24 funding, part-time undergraduate credit based teaching funding is

recalculated using EYM data. Credit values (for part-time undergraduate students) resulting from modules for which students registered up to and including, as well as after, 1 November 2023 will be used and the number of credit values associated with modules from which students withdraw will be deducted. The signed off EYM tables from the HESA IRIS extraction will be used for this purpose.

Process for signing off end of year monitoring and other data extracted from the HESA student record

6. Providers must sign off the data presented in the final 2023/24 HESA student record IRIS outputs as of the 1 November 2024 HESA final sign off date. The deadline for returning the signed IRIS outputs to Medr is **13 December 2024**. This is the second year of producing IRIS outputs under the new HESA student record, and we have made some changes since last year as a consequence of the consultation on changes to EYM for 2023/24. If any amendments to the extraction mapping or method are made after initial implementation of the extraction, we will inform providers. Providers should also inform us if they find any issues with the extraction, either in the presentation of the outputs or the mapping used.
7. During the HESA data quality checking period from 21 August to 25 October 2024, Medr will conduct quality checks of the data submitted. We will contact providers around six weeks prior to the final sign off date for the HESA student record of 1 November, and once providers have confirmed they are ready for us to send on any queries, we will provide a set of queries. Providers can also ask us to raise questions earlier than six weeks or set a date that they want us to send them our list of queries if they prefer, and can ask at any point for us to look at particular aspects of their data if that is useful to them. This is to assist with the provider's own internal quality checking process and to ensure the data are fit for purpose for Medr. As described in the [HESA Student Record collection schedule](#), providers are required to either resubmit their data to amend these anomalies, or provide an explanation as to why they are genuine.
8. Prior to returning the signed off IRIS outputs to Medr, providers must have undertaken sufficient checks to be satisfied that the extracted data are accurate, and/or have made amendments where necessary if data are not accurate. As 2023/24 is the second year of the new student record under Data Futures, and given the difficulties in the implementation of the new record, we are allowing changes to be made to all IRIS outputs at the sign off stage. Providers should provide an explanation of any changes made. Further details of the process are contained in the Data Requirements publication for 2024/25, to be published in August 2024.
9. We do not require a hard copy of the signed IRIS outputs. Signed outputs should be returned by emailing them to Hannah Falvey at hestats@medr.cymru. The deadline for return of the signed off outputs is 13 December 2024. Details about the process will be emailed separately to authorised signatories and data contacts in October 2024 as a reminder.
10. The IRIS outputs requiring sign off have an "S" prefix in front of their filename and are as follows:

- a) End of Year Monitoring
- b) Medr National Measures
- c) Part-time fee waiver allocations
- d) Part-time fee waiver monitoring
- e) Degree apprenticeships monitoring (along with the requested additional information)
- f) Master's bursaries monitoring
- g) Per capita funding
- h) Disability premium
- i) Access and retention premium
- j) Welsh medium premium
- k) Expensive subjects premium
- l) PGR training allocation
- m) Race equality/Wellbeing and mental health funding
- n) Targeted Employability Support funding
- o) Total full-time equivalent (FTE) (for capital funding allocations)

Audit of data

11. Providers are reminded that EYM data, and other tables as described in paragraph 10 as extracted from the HESA student record via IRIS, and any amendments made to the extractions, including methods used to calculate any estimates included in the amendments, may be subject to an external audit carried out by Medr or by contractors working on Medr's behalf. The systems and processes used to generate the HESA data extracted are in the scope of the institution's internal audits.

Further information

12. Any queries should be directed to Hannah Falvey (email hestats@medr.cymru).

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