

Annex C: How to submit a request to vary your provider's access and participation plan

Introduction

1. This annex describes how to submit a request to the Office for Students (OfS) to vary an access and participation plan. Please ensure you read it before making your submission.

Who needs to complete a variation request?

2. We expect **all** providers with an approved access and participation plan to submit a variation request and produce a summary of their existing plan which should include the content of their variation.

Submission deadline

3. The OfS will provide a pre-populated variation template containing your target and investment plan and fee information via the OfS provider portal from 1 May 2022. You will also find a weblink to the plan summary template for you to complete and submit via the portal.¹ If your variation request includes changes to your plan, you will also be able to submit this information using the portal.
4. You are invited to submit a completed summary of your plan, your varied access and participation plan, and amended variation template if this applies, via the OfS portal by **31 July 2022**.
5. As part of this request, by 31 July, you should also submit an accompanying email to app.process@officeforstudents.org.uk, outlining and explaining changes requested to your plan.
6. Once you have submitted your request to vary your access and participation plan, it will be considered against all the legislative requirements set out in HERA and the Higher Education (Access and Participation Plans) (England) Regulations 2018 and the expectations set out in Regulatory notice 1.
7. Following your submission, we may need to contact you with further questions when assessing your variation. Please ensure that a named contact at your provider is available to respond to any queries we may have.

¹ See www.officeforstudents.org.uk/publications/advice-on-requests-to-vary-access-and-participation-plans-2023-24/.

8. You will then be given the opportunity to make further amendments to the plan or provide further evidence. You should ensure that the appropriate staff, with sufficient levels of authority (or delegated authority), are available until the variation to the plan has been approved.
9. The Director for Fair Access and Participation will then decide whether to approve the variation to your plan.

Completing the return

How to find the templates

How to access the OfS portal access and participation plan area

10. To download the templates and submit your variation request, you will need access to the 'Access and participation plan' area on the OfS portal homepage (at <https://extranet.officeforstudents.org.uk/Data>). Each portal user will need to be granted access to this area to download the templates and submit the return.
11. If you have not registered on the OfS portal before, you will need to ask the nominated portal user administrator at your provider to create an account for you. Each person who requires access to the access and participation plan area will need to be registered with their own account.
12. You will need to be assigned to the 'Access and participation plan' area by the nominated OfS portal user administrator at your provider. The user administrator can find guidance on how to add portal users to portal areas on the main portal login page. If you are the user administrator, you will still need to assign yourself to the 'Access and participation plan' area.
13. If you do not know who your user administrator is, you can view the user administrators at your provider by logging onto the OfS portal:
 - Select 'My account' towards the right-hand side of the yellow banner
 - Click 'Activate an access key'
 - The names and contact details of the user administrator(s) at your provider will be at the top of the page.

If you do not have a OfS portal account and do not know who your user administrator is, please contact portal@officeforstudents.org.uk.

Navigating the access and participation plan portal area

14. Once you have been granted access, the 'Access and participation plan' area will be visible to you on the portal homepage. From the access and participation plan area you will see a section of the page titled 'Variations to access and participation plans'. Use the link provided to access the variations area.
15. The variations area has three sections. **Please ensure you use the section relevant to your most recent approved access and participation plan:**
 - Variations to access and participation plans that started in 2020-21
 - Variations to access and participation plans that started in 2021-22
 - Variations to access and participation plans that start in 2022-23.

16. Each section contains two links:

- Download your variations template and submit variations to your targets, investments or fee information
- Submit your plan summary and variations to your written plan.

17. Your variations template will be pre-populated with targets, investments and fee information from your most recent access and participation plan. Your template will only be available from the section relevant to your most recent access and participation plan. Once you have downloaded your template, you can amend the information as appropriate and submit amended templates to the same area of the portal.

18. You will not be able to make retrospective amendments to any information or milestones relating to historic academic years. If you wish to add new targets as part of your variation, you will only be able to set milestones for these targets into the future. You will only be able to submit an amended variation template to the section relevant to your most recent access and participation plan from which your template was downloaded.

19. If you cannot find your variations template in the relevant section, or if you think there are any errors in your pre-populated information, please email appdata@officeforstudents.org.uk.

20. Once you have successfully uploaded your variation template, you will be able to download a results package from the same area of the portal. The results package will highlight the amendments that you have made to your approved plan in your submission. Please review this information to confirm your amendments are as expected.

21. To submit a plan summary, please use the template available on the OfS website from the link provided.² If you wish to also make amendments to your written plan you can submit them in the same area. Please ensure that your summary and written plan submissions are uploaded to the section relevant to your most recent access and participation plan. Your summary and written plan should be free of any tracked changes and comments.

Submitting the required files

22. When you submit the document(s) noted in paragraph 4 via the portal we recommend that you use the following file prefixes:

Plan summary
Access and participation plan
Variation template

23. When you have uploaded these files to the portal, please email appprocess@officeforstudents.org.uk outlining and explaining the changes you have requested.

² See www.officeforstudents.org.uk/publications/advice-on-requests-to-vary-access-and-participation-plans-2023-24/.

Confirmation and sign-off

24. As with all OfS regulation, any submissions to the OfS are ultimately made on behalf of the provider's governing body. The variation request should be explicitly approved and signed off by the provider's accountable officer, but we do not require explicit assurance of approval by the governing body.