

Funding changes and migration of contracts 2014/15



Introduction

As we are approaching the new funding year 2014-15 which starts on 1st August 2014, there are important deadline dates and data changes to explain.

This document contains information on how the transition from 2013/14 to 2014/15 will take place. We have categorised the series of events involved in the transition, detailing tasks and responsibilities.

1. New Contracts for 2014/15

- Perspective will create new contracts for the 2014/15 funding year on 31st July 2014. The new contracts will be a continuation of all 2013-14 contracts.
- If there are some contracts you don't require in 2014/15, you must send a list of contracts to be removed, to Sunesis Support prior to 31/07/2014.
- If a new contract is required in the 2014-15 funding year (which did not exist in 2013/14), **users should create the new contract within Sunesis**.
- Once the 2014/15 contracts have been created, any learner with a **start date of 1st August 2014 onwards** should be input onto the **2014/15 contracts only** and updated using the **2014/15 ILR screens**.

Relevant Date: 31/07/2014

2. New ILR Form

- From 1st August, Sunesis will contain a PDF ILR form which incorporates the necessary fields and formats to cover data and funding requirements.

Relevant Date: 01/08/2014

3. Migration of Active Learners from 2013-14 into 2014-15

- Perspective will carry out the migration of all continuing learners once Period 12 ILR has been submitted on 6th August. All continuing learners from 2013-14 contracts will be migrated into 2014-15 contracts.
- Sunesis users should endeavour to bring all of their data as up to date as possible prior to 6th August to avoid duplication of input following migration.

Once migration has been completed:-

- New learners with a start date **prior to 1st August 2014** **must** be added to the 2013/14 contract which will create a 2013/14 ILR.
- When the 2013/14 ILR is first saved, the record will be automatically migrated forward onto the 2014/15 contract.
- If a learner with a start date before 1st August is added to a 2014/15 contract in error, an error message will appear to ask you to enrol the learner to the 2013/14 contract.
- If a learner subsequently leaves or achieves with an actual end date of prior to 1st August, this should be entered onto the 2013/14 contract. Once this has been saved, the 2014/15 record will be automatically removed/ de-migrated.
- If a learner with an actual end date before 1st August is amended on a 2014/15 contract in error, an error message will appear to ask you to make the amendment to the 2013/14 contract.
- Any other subsequent changes to a learner with a start date prior to 1st August 2014, should be made to both the 2013/14 and the 2014/15 ILR screens. E.g. Change of employer and EDRS number. This is the responsibility of the user.

Relevant Date: 07/08/2014



Important Note

As well as the above undertaking by Perspective to create the new 2014/15 environment within Sunesis, there are certain responsibilities for Sunesis Users

Sunesis Users Should:

- Inform Sunesis Support of any current 2013/14 contracts which are not required in 2014/15, prior to 31/07/2014.
- Create new 2014/15 contracts in Sunesis, which do not exist in 2013/14.
- Ensure data is as up to date as possible, prior to migration on the 7th August, to avoid duplication.
- Input any learner data **with a start date of 1st August 2014 onwards onto a 2014/15 contract** and only use the 2014/15 ILR screens.
- Input a new learner **with a start date prior to 1st August onto a 2013/14 contract**, and complete the 2013/14 ILR.
- Make amendments to learner data with a start date prior to 1st August to both 2013/14 and 2014/15 ILRs. Sunesis will not automatically synchronise such data changes between the two teaching years.
- Learners on a non/other funded contract for which ILR's are not updated will be migrated forward unless a relevant actual end date has been entered into the ILR. If this is not required please send a list of associated learners to Perspective to avoid unnecessary migration.

If you require any further clarification or advice on the end of year processes, please contact Sunesis support:



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