

## Funding changes and migration of contracts 2014/15



## Introduction

As we are approaching the new funding year 2014-15 which starts on 1<sup>st</sup> 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 31<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> 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 6<sup>th</sup> 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 6<sup>th</sup> August to avoid duplication of input following migration.

Once migration has been completed:-

- New learners with a start date **prior to** 1<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> 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 1<sup>st</sup> 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 7<sup>th</sup> August, to avoid duplication.
- ☐ Input any learner data **with a start date of 1<sup>st</sup> 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 1<sup>st</sup> August onto a 2013/14 contract**, and complete the 2013/14 ILR.
- ☐ Make amendments to learner data with a start date prior to 1<sup>st</sup> 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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