



Sunesis

## Funding changes and migration of contracts from 2014/15



## Introduction

As we are approaching the new funding year 2015-16 which starts on 1<sup>st</sup> August 2015, there are important deadline dates and data changes to explain.

This document contains information on how the transition from 2014-15 to 2015-16 will take place. We have categorised the series of events involved in the transition, detailing tasks and responsibilities.

## 1. New Contracts for 2015-16

- Perspective (UK) will create new contracts for the 2015-16 funding year on 31<sup>st</sup> July 2015. The new contracts will be a continuation of all 2014-15 contracts.
- If there are some contracts you don't require in 2015-16, you must send a list of contracts to be removed, to Sunesis Support prior to 31/07/2015.
- If a new contract is required in the 2015-16 funding year (which did not exist in 2014-15), **users should create the new contract within Sunesis**.
- Once the 2015-16 contracts have been created, any learner with a **start date of 1<sup>st</sup> August 2015 onwards** should be input onto the **2015-16 contracts only** and updated using the **2015-16 ILR screens**.

Relevant Date: 31/07/2015

## 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: 01/08/2015

### 3. Migration of Active Learners from 2014-15 into 2015-16

- Perspective (UK) will carry out the migration of all continuing learners once Period 12 ILR has been submitted on 6<sup>th</sup> August 2015. All continuing learners from 2014-15 contracts will be migrated into the 2015-16 contracts with the same name.
- 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 2014-15 contract which will create a 2014-15 ILR.
- When the 2014-15 ILR is first saved, the record will be automatically migrated forward onto the 2015-16 contract.
- If a learner with a start date before 1<sup>st</sup> August 2015, is added to a 2015-16 contract in error, an error message will appear to ask you to enrol the learner to the 2014-15 contract.
- If a learner subsequently leaves or achieves with an actual end date of prior to 1<sup>st</sup> August 2015, this should be entered onto the 2014-15 ILR. Once this has been saved, the 2015-16 ILR will be automatically removed/ de-migrated.
- If an ILR with an actual end date before 1<sup>st</sup> August 2015 is completed on a 2015-16 contract in error, an error message will appear to ask you to make the amendment to the 2014-15 ILR.
- Any other subsequent changes to a learner with a start date prior to 1<sup>st</sup> August 2015, should be made to both the 2014-15 and the 2015-16 ILR screens. E.g. Change of employer and EDRS number. This is the responsibility of the user.

Relevant Date: 07/08/2015

## Important Note

As well as the above undertaking by Perspective (UK) to create the new 2015-16 environment within Sunesis, there are certain responsibilities for Sunesis Users

### Sunesis Users Should:

- Inform Sunesis Support of any current 2014-15 contracts which are not required in 2015-16, prior to 31/07/2015.
- Create new 2015-16 contracts in Sunesis, which do not exist in 2014-15.
- Inform Sunesis Support of any situation where learners are changing contracts and should not be migrated forward onto their like named contract.
- Ensure data is as up to date as possible, prior to migration on the 7<sup>th</sup> August 2015, to avoid duplication.
- Input any learner data **with a start date of 1<sup>st</sup> August 2015 onwards onto a 2015-16 contract** and only use the 2015-16 ILR screens.
- Input a new learner **with a start date prior to 1<sup>st</sup> August 2015 onto a 2014-15 contract**, and complete the 2014-15 ILR.
- Make amendments to learner data with a start date prior to 1<sup>st</sup> August 2015 to both 2014-15 and 2015-16 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:



Tel: 0121 506 9400

Email: support@perspective-uk.com