

Funding changes and migration of contracts from 2014/15



Introduction

As we are approaching the new funding year 2015-16 which starts on 1st 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 31st 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 1st 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 1st August, Sunesis will contain a PDF ILR form which incorporates the necessary fields and formats to cover data and funding requirements.

Relevant Date: 01/08/2015



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 6th 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 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 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 1st 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 1st 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 1st 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 1st 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 7th August 2015, to avoid duplication.
- ☐ Input any learner data **with a start date of 1st 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 1st August 2015 onto a 2014-15 contract**, and complete the 2014-15 ILR.
- ☐ Make amendments to learner data with a start date prior to 1st 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:



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Email: support@perspective-uk.com