This guide provides an overview of the key steps involved in using version 3 of Interim Learning Provider Portal (LPP) to register and make payment decisions for all Learners.

There are twelve sections in this Guide:

1. Checklist of Interim LPP Version 3 functions
2. Log into the Interim LPP Version 3
3. My Account
4a. Maintenance – Locations
4b. Maintenance – Groups
4c. Maintenance – Study Patterns
5. Register Learners
6. Record Attendance
7. Record EMA FE Bonus
8. Record 2007/08 EMA Bonus Decision
9. Record End of Learning
10. Amend Registrations
11. Registered Learners Report
12. Third Party Interfaces

General Guidance

This guidance is for version 3 of the Interim LPP system and is applicable for all Learners, including Adult Learning Grant (ALG) Learners and any 2007/08 Learners that still require Attendance/Bonus Payment decisions.

Please follow the guidance instructions provided in this document very carefully to ensure all Learner information is entered correctly and the relevant Learner information and attendance records are submitted to the Learner Support Service (LSS).

You will need a Username and Password to login to the Interim LPP. If you are already using the system to make payment decisions for 2008/09 EMA Learners you can continue to use the username and password you will have been sent during the week beginning the 18th August. If you do not have a Username and Password please call our Learning Provider helpline on 0845 600 7979 and they will advise you on how to access the Interim LPP.

As we update the LPP, please be aware that the Learner data you enter on the Interim LPP for 2008/09 Learners on all types of courses will automatically be transferred to the full LPP when it is released.

If you need further assistance to use the Interim LPP, please call our Learning Provider helpline on 0845 600 7979 and one of our dedicated support team will be happy to help.
# 1. Checklist of Interim LPP user functions

The checklist below provides a summary of all the functions available on version 3 of the Interim LPP. Any functions that are not available as part of the Interim LPP, will be available in the full LPP.

<table>
<thead>
<tr>
<th>Function</th>
<th>Via Interim LPP Version 3</th>
<th>Via Help line</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Register Learner for all 2008/09 courses</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 5 (pg 12 - 15)</td>
</tr>
<tr>
<td>2. Record/amend weekly attendance and/or flexible bonus indicators</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 6 (pg 16 - 19)</td>
</tr>
<tr>
<td>3. Maintain Locations</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 4a (pg 7)</td>
</tr>
<tr>
<td>4. Maintain Groups</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 4b (pg 8)</td>
</tr>
<tr>
<td>5. Maintain Study Patterns</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 4c (pg 9 - 11)</td>
</tr>
<tr>
<td>6. <strong>NEW</strong> - Record EMA FE Bonus</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 7 (pg 20 - 22)</td>
</tr>
<tr>
<td>7. Record 2007/08 EMA Bonus</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 8 (pg 23 - 24)</td>
</tr>
<tr>
<td>8. Record End of Learning</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 9 (pg 25 - 26)</td>
</tr>
<tr>
<td>9. <strong>NEW</strong> - Amend learner registrations</td>
<td>✓✓ ✓✓</td>
<td>✓✓ ✓✓</td>
<td>Please refer to Section 10 (pg 27 - 30)</td>
</tr>
<tr>
<td>10. Registered Learners Report</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 11 (pg 31)</td>
</tr>
<tr>
<td>11. Forgotten Username and/or Password</td>
<td>✓✓ ✓✓</td>
<td>✓✓ ✓✓</td>
<td>Please refer to Section 2 (pg 3)</td>
</tr>
<tr>
<td>12. Maintain ‘My Account’</td>
<td>✓✓ ✓✓</td>
<td>✓✓ ✓✓</td>
<td>Please refer to Section 3 (pg 5)</td>
</tr>
<tr>
<td>13. Third Party Interfaces (3PIs)</td>
<td>✓✓ ✓✓</td>
<td>✗</td>
<td>Please refer to Section 12 (pg 32)</td>
</tr>
</tbody>
</table>
2. Log into the Interim LPP

To Login to the Interim LPP version 3, you will need a Username and Password. If you are already using the Interim LPP version 2 to make payment decisions for 2008/09 EMA and ALG Learners you can continue to use the Username and Password you should have been provided during the first week in August 2008 for version 1 of the Interim LPP.

If you do not have a Username and Password, please call the Learning Provider Helpline on 0845 600 7979 for advice on how to access the Interim LPP. Your existing EMASYS or EMS Usernames and Passwords will not work in the Interim LPP.

If you want to set up additional users to access the Interim LPP, please contact the Learning Provider Helpline on 0845 600 7979 and they will do this for you. The new version of the Interim LPP will be available from 9.00am on Monday 22nd December 2008. To access the system, please go to https://providerportal.lsclearnersupport.co.uk

Please follow the instructions below to log into the Interim LPP.

1. Please enter your Username as it appears in the Login email or copy the username from within the Login email and paste into the Username field.

2. Please enter your Password as it appears in the Login email or copy the Password from within the Login email and paste into the Password field. Upon successful Login to the Interim LPP, you can change your Password to one that is more memorable. Please see Step 3 overleaf for more details.

3. Once you have entered your Username and Password as they appear in your Login emails, please click on the ‘Login’ button and you will enter the Interim LPP.

4. If you forget your Username or Password for the Interim LPP, click on the ‘Forgotten Password’ or ‘Forgotten Username’ link and follow the instructions provided to receive a new Password and a copy of your existing Username.

If you forget both your Username and your Password for the Interim LPP, please contact the Learning Provider Helpline on 0845 600 7979 and one of our support team advisors will re-send your existing Username and a new Password.
2. Log into the interim LPP

Upon successful Login, you will gain access to the Interim LPP and be presented with the screen below.

There are eight tabs running along the top of the screen which represent the key functionality of the Interim LPP: Register Learners; Record Attendance; Record EMA FE Bonus; Record 07/08 Bonus; Record EOL; Amend Registration; Maintenance and Learners Report. Please click on the relevant tab to access these functions.

To amend any of your personal details, click on the ‘My Account’ link on the left of the screen. As indicated in the screen on the next page you can use this function to change your Password and change your Email address.

If you want to Logout of the Interim LPP, please click on the ‘Logout’ link on the left hand side of the screen. If you have entered any Learner information during a session on the Interim LPP, please ensure you have pressed ‘Submit’ for all the relevant Learner information before Logging out to avoid losing any Learner information.

The main home page screen now has a message board function. This will provide updates to users on updates to the Interim LPP.

By clicking on the ‘Show Archived Messages’ button, you can view all message board messages created in the past.
You can manage your Interim LPP account using the ‘My Account’ function.

1. **Change Password**
   - Current Password
   - New Password
   - Confirm New Password
   - Save New Password

2. **Change Email Address**
   - Current Email Address
   - New Email Address
   - Save New Email Address

3. **Change Name**
   - New Forename
   - New Surname
   - Save Name

4. **Change Username**
   - New Username
   - Current Password
   - Save Username

You can change your password for the Interim LPP by typing in your current password in the relevant field and then creating and confirming a new password. Remember to click ‘Save New Password’ to ensure this change is recorded and saved on the system.

You can change your email address by typing in your current email address in the relevant field and then typing in your new email address. Remember to click ‘Save New Email Address’ to ensure this change is recorded and saved on the system.

You can change the Name that appears on the system by typing in your new Forename and surname in the relevant fields. Remember to click ‘Save Name’ to ensure this change is recorded and saved on the system.

You can change your username for the Interim LPP by typing in your new Username in the relevant field and the entering your current password. Remember to click ‘Save Username’ to ensure this change is recorded and saved on the system.

Please note, you will be logged out of the system and will need to login again using your new username.
4. Maintenance

Before registering any of your Learners on the Interim LPP, you must create Locations, Groups and Study Patterns. Please click on the seventh tab along the top of the screen labelled ‘Maintenance’.

This Maintenance tab now includes the maintenance of three areas:

- Maintain Location
- Maintain Group
- Maintain Study Pattern

Please note: all of the Locations, Groups and Study Patterns created on previous versions of the Interim LPP will still be recorded on version 3 of the Interim LPP. Nevertheless, if you need to update, delete or create new Locations, Groups or Study Patterns you can do so by using the Maintenance function.
4a. Maintenance - Locations

Before registering your Learners on the Interim LPP, you must create Locations that can then be attached to Learners upon registration. To add and edit Locations, please click on the seventh tab along the top of the screen labelled ‘Maintenance’ and click on the first link ‘Maintain Location’.

<table>
<thead>
<tr>
<th>Record Attendance</th>
<th>Record EMA FE Bonus</th>
<th>Record 07/08 Bonus</th>
<th>Record EOL</th>
<th>Amend Registrations</th>
<th>Maintenance</th>
<th>Learners Report</th>
</tr>
</thead>
</table>

- Maintain Location
  - Maintenance of Course Locations
- Maintain Group
  - Maintenance of Course Groups
- Maintain Study Pattern
  - Maintenance of Study Patterns

**Maintain Location**

<table>
<thead>
<tr>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
</tr>
<tr>
<td>Liverpool</td>
</tr>
<tr>
<td>London</td>
</tr>
<tr>
<td>Nuneaton</td>
</tr>
</tbody>
</table>

1. If you want to add Locations for your Learners, enter the relevant name i.e. something easily recognisable to you, in the blank field provided.

2. To ensure this new Location is recorded on the Interim LPP, **click on the ‘Add’ button**. You should then see the new Location included in the Location table below.

3. To edit existing Locations that you have set up, click on the ‘Edit’ button on the relevant row.

Once you have amended your Location name in the text field provided, you must remember to click the ‘Update’ button that appears in place of the Edit button.

Upon completion of adding new Locations or editing existing Location, **a message should appear ‘Submitted Successfully’**

Please note: Once you have attached Learners to a Location, this Location cannot be deleted.
4b. Maintenance - Groups

Before registering your Learners on the Interim LPP, you must create Groups that can then be attached to Learners upon registration. To add and edit Groups, please click on the seventh tab along the top of the screen labelled ‘Maintenance’ and then click in the second link in the list ‘Maintain Group’.

If you want to add Groups for your Learners, enter the relevant name i.e. something easily recognisable to you, in the blank field provided.

To ensure this new Group is recorded on the Interim LPP, click on the ‘Add’ button. You should then see the new Group included in the Group table below.

To edit existing Groups that you have set up, click on the ‘Edit’ button on the relevant row.

Once you have amended your Group name in the text field provided, you must remember to click the ‘Update’ button.

Upon completion of adding new Groups or editing existing Groups, a message should appear ‘Submitted Successfully’

Please note: Once you have attached Learners to a Group, this Group cannot be deleted.
If your 2008/09 ALG and EMA FE Learners do not use standard term dates, you must create Study Patterns on the Interim LPP for your Learning Provider before you can begin to register Learners. If you have already created these on previous versions of the Interim LPP, these will still exist on the new version. If you want to create new ones or amend or delete existing study patterns, click on the ‘Maintenance’ tab and then the third link ‘Maintain Study Pattern’ as illustrated in the screen below.

1. You can only Edit or Delete an existing study pattern if it has not already been attached to a registered learner.

2. You can Disable an existing study pattern by clicking on the ‘Disable’ button.

3. If you want to create Study Patterns, click on the ‘Add’ button. A series of blank fields will be displayed under the ‘Add’ button. See screen shot on the next page.
To add a new study pattern, in the blank ‘Name’ field, please enter an appropriate name for your study pattern. You can enter anything that will be recognisable to you and your Provider.

You can enter a description for your study pattern for your own reference. This field is not mandatory and therefore you can leave it blank if necessary.

The ‘Enabled?’ box is defaulted to a tick so the Study Pattern you have created appears as a drop down menu in the register learner section (Section 5). If you do not want to use this study pattern when registering Learners, you must untick the ‘Enabled?’ box.

To enter the Start and End Dates for each Term study pattern, please select the relevant dates from the drop down menus provided (see Default study pattern dates in the table below). Please note, the number of weeks of study must be 10 or more. If the dates entered correspond to less than 10 weeks, when you try to submit the study pattern details as in Step 6 overleaf, a message will display indicating the invalid Term dates. You will need to re-enter valid term dates that confirm eligibility.

A default study pattern is pre-loaded onto the Interim LPP using the dates below. For any other term dates please create a suitable study pattern (Section 4c) and apply it on Registration.

<table>
<thead>
<tr>
<th>Term</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term 1</td>
<td>01/09/08</td>
<td>13/10/08</td>
</tr>
<tr>
<td>Term 2</td>
<td>03/11/08</td>
<td>15/12/08</td>
</tr>
<tr>
<td>Term 3</td>
<td>05/01/09</td>
<td>09/02/09</td>
</tr>
<tr>
<td>Term 4</td>
<td>23/02/09</td>
<td>30/03/09</td>
</tr>
<tr>
<td>Term 5</td>
<td>20/04/09</td>
<td>18/05/09</td>
</tr>
<tr>
<td>Term 6</td>
<td>01/06/09</td>
<td>20/07/09</td>
</tr>
</tbody>
</table>
To save your Study Pattern details, you must remember to press the ‘Submit’ button on the bottom left hand side of the screen. Upon successful submission, the Add/Edit study pattern section will no longer be displayed and your new study pattern should appear in a study pattern summary table at the top of the screen. If you do not press Submit after entering your Study Pattern details, all of the information entered will be lost and you will need to begin the process again from Step 1 of this section.

If you have already created Study Patterns for your Provider, you can edit existing Study Patterns. However, if you have already used the Study Pattern when registering learners, you will no longer be able to edit/delete the Study Pattern. You can only view the Study Pattern details by clicking on the ‘View’ button as illustrated in the screen below.

To change your Study Pattern, click on the ‘Edit’ button by the relevant Study Pattern. A series of fields containing the existing Study Pattern details will display under the ‘To add/edit existing study pattern and terms’ header. You can now edit study pattern details accordingly. Remember to press the ‘Submit’ button on the bottom left hand side of the screen.
5. Register Learners

To Register all of your new 2008/09 EMA and ALG Learners, please click on the ‘Register Learners’ tab on the top left of the Interim LPP screen and follow the instructions provided below. Please note, you must first create the appropriate Study Patterns, Locations and Groups before registering your Learners. Please refer to section 4 of this guide to perform these functions.

Under the personal details header, you will see a LURN (Learner Unique Reference Number) blank text box. There are four valid LURN’s you can enter depending on whether the it is an ALG or EMA Learner:

For ALG Learners

1. Enter the 9 character reference number that is on the ALG Learners Notice of Entitlement. This includes a 5 digit number, followed by a ‘/’, 2 digits to represent the Academic year, and a letter used to signify whether or not this is the Learners 1st, 2nd or 3rd year of claiming ALG

For EMA Learners

1. Enter the 12 digit number that is recorded on the Notice of Entitlement number (NoE) letter. Remember to press ‘Tab’ on your keyboard; or

2. Enter a Manual Number (MN). This is 8 characters beginning with MN. If you enter a MN number and the Learner has a NoE number, when you press ‘Tab’ on your keyboard you will be prompted to enter the NoE number that is displayed on screen; or

3. Enter an Entitlement Letter number (EL number). The system will prompt you to contact the learner to get their NoE or their MN number. If these are not available, it will allow you to progress by translating the EL number into an MN number. Please note, Contract part 1 and 2 are still required for EMA Learners.

Remember to press ‘Tab’ on your keyboard after entering the relevant LURN. This will automatically populate the Learners Surname, Forename, Date of Birth and Postcode. Please check these details to ensure the system has matched the LURN to the correct Learner. If no Learner details are displayed, please check you have entered the correct LURN and pressed ‘Tab’ on your keyboard.
5. Register Learners

Using the dropdown menu, please select the relevant Group for this Learner. To create/edit your Learner Groups please refer to Section 4b of these Guidance notes.

Using the dropdown menu, please select the relevant Programme. You can select from ALG, EMA E2E, PLA, FE or EMA FE short course. When registering your learner please ensure that you have selected the correct programme of study type from the drop down list as once you have submitted the details you will not be able to amend them.

Please note: for the EMA E2E option, there is a message displaying in the drop down menu that a Provider Declaration is required (See screen above). Please ensure you have submitted this declaration to LSS before registering a learner on EMA E2E entitlement.

Depending on the Programme selected, the registration data fields displayed will differ. The following instructions provide specific guidance for registering learners according to the different Programmes a learner is taking part in.
5. Register Learners for EMA E2E, PLA or FE short courses

If a learner is on an EMA E2E, PLA or EMA FE short course, you will be presented with Start and End Date fields and a Bonus Pattern field. See screen below.

If a learner is on ALG or EMA FE, please see the screen overleaf.

Using the dropdown menu, select the relevant ‘Start Date’ and ‘End Date’. Please ensure the End Date is a minimum of 10 weeks after the Start Date. If you enter any period of less than 10 weeks, when you try to Submit this data you will receive a message informing you of the 10 week minimum rule and will need to re-enter a valid End Date.

Using the dropdown menu under ‘Bonus Pattern’ please select the relevant Bonus Pattern from the options provided: Weekly, Fortnightly, Monthly, 3-Monthly and 6-Monthly. Please note, all flexible bonus payments will only be made on a weekly basis.

Once you have selected all the Learner’s Course details you must click the ‘Submit’ button on the bottom left of the screen. Upon successful submission, a message will be displayed ‘Learner registered successfully’ and all the Learner and Course details fields above will become blank. If you do not press ‘Submit’ after entering your Learner details, all of your information will be lost and you will need to begin the process again from Step 1.
5. Register Learners for EMA E2E

If your learner is on ALG or EMA FE, you will be presented with the screen below.

Please note: version 3 of the Interim LPP has a new function that allows you to confirm you have completed Contract Part 2 with your learners on EMA FE courses. You must complete Contract Part 2 before EMA FE Bonus decisions can be confirmed.

Using the dropdown menu please select the relevant Study Pattern from the options you have created. To create your Study Patterns please refer to Section 4c of these Guidance notes. The Study Pattern term dates will then be displayed in a table below.

For EMA FE only: You must have completed Contract Part 2 with the learner before EMA FE Bonus can be confirmed. This can be recorded when Registering Learners (on this screen) or through Record EMA FE Bonus (section 7) or Amend Registration (section 10)

Once you have selected all the learner’s course details you must click the ‘Submit’ button on the bottom left of the screen. Upon successful submission, a message will be displayed ‘Learner registered successfully’ and all the Learner and Course details fields above will become blank. If you do not press Submit after entering your Learner’s details, all of your information will be lost and you will need to begin the process again from Step 1.

Once you have submitted your first Learner’s personal and course details, all the previously populated fields will become blank and you can begin to enter another Learner’s details. To do this please repeat steps 1-7.

If any of the Learner or course data you enter is invalid, when you click the ‘Submit’ button, you will be presented with a message in red text describing the reason the data has not been successfully submitted. If a message in red is displayed, you will need to re-enter the correct data and press Submit again.
6. Record Attendance

Once you have registered your Learners, you can record Attendance and flexible bonus indicators by clicking on the second tab along the top of the screen ‘Record Attendance’ and following the instructions below.

- If you want to record EMA FE 2008/09 Bonus decisions (January and July bonuses) refer to Section 7
- If you want to record 2007/08 EMA Bonus decisions, please refer to Section 8.

You will only be able to make historical payment decisions for 2007/08 EMA Learners who were migrated from EMASYS. You cannot backdate any later than the w/c 27th August 2007.

To speed up or simplify the process of recording attendance for Learners you can use various Learner search criteria.

1. You must select the appropriate ‘Week Commencing’ date that you wish to record Learner attendance for.

2. To refine your Learner Attendance Recording search, you can select a Scheme and Programme or you can select ‘All’ to display a list of all Learners on all courses during the week commencing date selected. By clicking on the ‘Select’ button as described in step 6 of these instructions, all Learners on the Programme Scheme and Week Commencing date selected will be displayed in a table below.

3. To refine your Learner Attendance Recording search, you can select a particular Location or you can select ‘All’ to display a list of all Learners at that Location attending Learning during the Week Commencing date selected. By clicking on the ‘Select’ button as described in step 6 of these instructions, all Learners under the Location and Week Commencing date selected will be displayed in a table below.
6. Record Attendance

To refine your Learner Attendance Recording search, you can select a particular Group, or you can select ‘All’ to display a list of all Groups of Learners attending Learning during the week selected. By clicking on the ‘Select’ button as described in Step 6 of these instructions, all Learners under the Group and Week Commencing date selected will be displayed in a table below.

To refine your Learner Attendance Recording search, search by selecting a particular Learner or you can select ‘All’ to display a list of all of your Learners. You will notice that after each learner name, the Learner Unique Reference Number (LURN) is displayed so you can distinguish between any learners with the same name. By clicking on the ‘Select’ button as described in Step 6, all relevant Learners for the Week selected will be displayed in a table.

To display a list of all the Learners you wish to record attendance for - according to the search criteria selected during steps 1-5 – you must click on the ‘Select’ button on the right of the screen. A list of all relevant Learners should be displayed in a table.

If you have previously submitted Learner attendance records for a specific learner/group of learners, you can select the ‘Show previously submitted’ check box. If you then click on ‘Select’, the Learner attendance table will display the Learner Attendance history for all the Learners according to the search criteria selected. For all those weeks you have recorded attendance/bonus payment against, the ability to select an option for Attendance/Bonus payment will be greyed out and the Attendance Payment Reference (‘Att Pay Ref’)/Bonus Payment Reference (‘Bonus Pay Ref’) will display if it has been paid.

If you require further guidance on selecting Learners to record Attendance and Bonus Patterns, please click on the ‘Show/hide help’ box and guidance text will be displayed.
6. Record Attendance

Upon selecting your relevant Learner details, you can now record attendance and flexible bonus indicators against each Learner displayed in the Learner Attendance table. See screen below.

To record whether a Learner has attended their course for the week selected, please select either ‘Yes’ or ‘No’ from the drop down field. If you are unsure whether the Learner has attended, simply select the blank field. This blank field can then be updated to either a ‘Yes’ or ‘No’ as and when you can make the attendance decision.

Please note, you will also be able to make historical attendance decisions for 2007/08 EMA Learners but you can backdate no later than the w/c 27th August 2007.

To record whether a flexible bonus indicator for the week selected, please select either ‘Yes’ or ‘No’ from the dropdown field. If you are unsure or are not yet aware of whether the Learner should receive a Bonus Payment, simply select the blank field. This blank field can then be updated to either a ‘Yes’ or ‘No’ as and when you can make the flexible bonus indicator decision. Please note, Bonus Indicators do not apply to ALG Learners.

Once you have updated your Learner Attendance/Bonus payment indicators, all of the updated rows should turn green as displayed in the screen above. Any attendance/Bonus payment indicators that have already been set and display a payment reference number or ‘Unpaid’ or ‘Authorised’ in either the ‘Att Pay Ref’ or ‘Bonus Pay Ref’ columns will be greyed out.
6. Record Attendance

Upon selecting ‘Yes’, ‘No’ or blank for Learner Attendance and Bonus Payment, the whole row will change to green. The ‘Att Pay Ref’ and ‘Bonus Pay Ref’ will display one of the following:

- **Unpaid**: No payment made yet
- **Authorised**: A payment decision has been made and this had been batched into a daily payment run. At this point, the decision can no longer be set to N or no show.
- **A payment reference number**: This is an internal reference number that will display when a payment has been made

A message will also appear in the bottom left of the screen, reminding you to press the ‘Submit’ button in order to save data. Only press Submit when you have recorded attendance against all the learners displayed in the table. If you want to record decisions for the learners on a subsequent page, you will need to submit changes for this page before progressing to the next page.

You can record attendance/bonus payments as a bulk process. Select ‘Set attendance all to ‘Yes’ or ‘No’ or set bonus all to ‘Yes’ or ‘No’. The Attendance/Bonus decisions will be changed for the list you are viewing and you can edit the exceptions individually and change decisions to a ‘Yes’ or ‘No’ accordingly.

Remember to click on the ‘Submit’ button on the bottom left of the screen. You will notice each Learner Attendance row you have just updated will disappear. If you have checked the box ‘Show previously submitted’, only those rows displaying Attendance/Bonus Payments that have already been set to ‘Yes’ or ‘No’ will remain displayed. If you do not press Submit after entering your Learner attendance records, all of your information will be lost and you will need to begin the process again from Step 1 of this section.
7. Record EMA FE Bonus

Version 3 of the Interim LPP has new functionality – the ability to make bonus payment decisions for learners on 2008/09 EMA FE Courses (for January and July bonuses only).

Please click on the third tab ‘Record EMA FE Bonus’ and follow the instructions below.

To select the Learners against each Bonus Payment Type (January or July), you can search using Location, Group or Learner name criteria. Please follow the instructions in Section 6 for Record Attendance to understand the search criteria instructions in more detail.

Upon selecting the relevant Learner according to the search criteria, you must click on ‘Select’ to display the learners in a table for recording 2008/09 EMA FE Bonus decisions. The relevant learner’s Programme, Location, Group, Surname and First Name will then be displayed in a table.

If you have previously submitted Learner attendance records for a specific learner/group of learners, you can select the ‘Show previously submitted’ check box. Click on ‘Select’, the 2008/09 EMA FE Learner Bonus table will display all the relevant Learners. For all those weeks you have recorded bonus payment against, the ability to select an option for Bonus payment will be greyed out and the Bonus Payment Reference (‘Bonus Pay Ref’) will display if it has been paid.
To record a bonus payment against a Learner on a 2008/09 EMA FE course, please select either ‘Yes’ or ‘No’ from the drop down field. If you are unsure whether the Learner should receive a Bonus Payment, simply select the blank field. This blank field can then be updated to either a ‘Yes’ or ‘No’ as and when you can make the Bonus Payment decision. Upon selecting a Bonus option, the row should turn green and a message in green text will appear prompting you to press ‘Submit’ to save your data.

You must have completed Contract Part 2 with the learner before EMA FE Bonus can be confirmed. You will not be able to submit a payment decision unless you have completed Contract Part 2 with the learner and checked the relevant box.

This can also be recorded when Registering Learners (Section 5) or through Amend Registration (section 10)
You can record bonus payments as a bulk process. Select to either ‘Set all bonus flags to ‘Yes’ or ‘No’. The Bonus decisions will be changed for the list you are viewing and you can edit the exceptions individually and change decisions to a ‘Yes’ or ‘No’ where appropriate. You should check all decisions are correct before you click ‘Submit’.

You must remember to click on the ‘Submit’ button on the bottom left of the screen. Upon successful submission, a message will be displayed indicating successful submission and each Learner row you have just updated will disappear.

If you have checked the box ‘Show previously submitted’, only those rows displaying Bonus Payments that have already been set to ‘Yes’ or ‘No’ will remain displayed. If you do not press Submit after entering your Learner attendance records, all of your information will be lost and you will need to begin the process again from Step 1 of this section.
8. Record 2007/08 EMA Bonus Decisions

Providing you have registered all of your EMA Learners, you can record Bonus Indicators for 2007/08 EMA Learners by selecting the fourth tab on the Interim LPP labelled ‘Record 07/08 Bonus’ and following the instructions below. To record Bonus decisions for any learners on 2008/09 EMA FE courses, please refer to Section 7.

There are four Bonus Payment Types you can record bonus indicators for, please select the relevant option form the menu provided: Passport/ILP; Achievement 1; Achievement 2 and Progression.

<table>
<thead>
<tr>
<th>Scheme And Programme</th>
<th>Location</th>
<th>Group</th>
<th>Surname</th>
<th>First Name</th>
<th>Bonus</th>
<th>Bonus Pay Ref</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMA E2E 0708</td>
<td></td>
<td></td>
<td>CHAMBERS</td>
<td>LESLIE</td>
<td></td>
<td>Unpaid</td>
</tr>
<tr>
<td>EMA E2E 0708</td>
<td></td>
<td></td>
<td>COY</td>
<td>JAMES</td>
<td></td>
<td>Unpaid</td>
</tr>
<tr>
<td>EMA PLA 0708</td>
<td></td>
<td></td>
<td>YARD</td>
<td>PHIL</td>
<td></td>
<td>Unpaid</td>
</tr>
</tbody>
</table>

Remember to click on ‘Select’ to display the learners in a table for recording 07/08 Bonus indicators. The relevant learners Programme, Location, Group, Surname and First Name will then be displayed in a table.

If you have previously submitted Learner attendance records for a specific learner/group of learners, you can select the ‘Show previously submitted’ check box. Click on ‘Select’ and the 2007/08 Learner Bonus table will display all the Learners according to the search criteria selected. For all those weeks you have recorded bonus payment against, the ability to select an option for Bonus payment will be greyed out and the Bonus Payment Reference (‘Bonus Pay Ref’) will display if it has been paid.
8. Record 2007/08 EMA Bonus Decisions

To record a bonus payment against a Learner still on a 2007/08 course, please select either ‘Yes’ or ‘No’ from the drop down field. If you are unsure whether the Learner should receive a Bonus Payment, simply select the blank field. This blank field can then be updated to either a ‘Yes’ or ‘No’ as and when you can make the Bonus Payment decision. Upon selecting a Bonus option, the row should turn green and a message in green text will appear prompting you to press ‘Submit’ to save your data.

You can record 2007/08 bonus payments as a bulk process. To do this, go to the bottom left of the screen, above the Submit button. You can select to either ‘Set all bonus flags to ‘Yes’ or ‘No’. The Bonus decisions will be changed for the list you are viewing and you can edit the exceptions individually and change decisions to a ‘Yes’ or ‘No’ where appropriate. You should check all decisions are correct before you click ‘Submit’.

In order to save your 2007/08 Learner Bonus Payment records you must remember to click on the ‘Submit’ button on the bottom left of the screen. Upon successful submission, a message will be displayed indicating successful submission and each Learner row you have just updated will disappear. If you have checked the box ‘Show previously submitted’, only those rows displaying Bonus Payments that have already been set to ‘Yes’ or ‘No’ will remain displayed. If you do not press Submit after entering your Learner attendance records, all of your information will be lost and you will need to begin the process again from Step 1 of this section.
9. Record End of Learning

Using the End of Learning (EOL) function on the Interim LPP, you can indicate whether a Learner has left learning. Please click on the fifth tab along the top of the screen labelled ‘Record EOL’ and follow the instructions below.

To select the Learners, you can search using Scheme, Location, Group or Learner name criteria. Please follow the instructions in Section 7 for Record Attendance to understand the search criteria in more detail. **Remember to click ‘Select’**

Please select the relevant date for the EOL week using the drop down menu provided.

To record a reason for EOL, please select an option from the drop down menu. The options provided are: No Show; Transferred to another Provider; Left Learning; Programme Completed; Alternative Funding

You can insert a description for the End of Learning indicator in the Notes open text field. This field is not mandatory and therefore you can leave it blank if necessary.

Once you have recorded the EOL and the Reason against each Learner, **you must remember to click on the ‘Submit’ button at the bottom of the table.** If you do not press Submit after entering your EOL indicators, all of your information will be lost and you will need to begin the process again from Step 1 of this section.
9. Record End of Learning

Upon pressing ‘Submit’, the system will then validate this EOL against this Learner. Notification messages in red text will appear under the Submit button if:

- The EOL date selected precedes weeks when payment decisions have been made.

Upon pressing ‘Submit’, the system will then validate this EOL against this Learner. Notification messages in red text will appear under the Submit button if:

- EMA courses with flexible bonuses: Flexible bonus payments will be triggered
- You select the “No Show” option and attendance/bonus decisions have already been made.

Once the EOL flag is set, the learner can register for another course.
10. Amend Registrations

Version 3 of the Interim LPP has new functionality – the ability to amend learner registration details.

Please note: you will not be able to change a Learner’s Programme or course Start Date using the Interim LPP. Please contact the Learning Provider Helpline on 0845 600 7979 and one of our dedicated support team will be able to make these changes for you.

Please click on the sixth tab ‘Amend Registrations’ and follow the instructions below.

To select the relevant Learners, you can search using Scheme and Programme, Location, Group or Learner name criteria. Please follow the instructions in Section 7 for Record Attendance to understand the search criteria instructions in more detail.

Remember to click on the ‘Filter’ button to display the results of your learner search criteria.

To edit a learner’s registration details, click on the ‘Edit’ link by the relevant learner. You should be presented with a screen similar to below. The fields displayed will differ depending on the Programme the learner is currently registered on.
10. Amend Registrations

You can view all Attendance details by date, attendance decision, reference number etc.

You can view all Bonus Pattern Details by date, bonus type, bonus flag and reference number.

You can change Location by clicking on the drop down menu and selecting the relevant new location (to edit or add locations, please see Section 4a). **Remember to press Submit after updating any learner registration details.**

You can change Group by clicking on the drop down menu and selecting the relevant new Group (to edit or add Groups, please see Section 4b). **Remember to press Submit after updating any learner registration details.**

You cannot change the Scheme and Programme for any learner. To do this, please contact the Learning Provider helpline on **0845 600 7979** and one of our advisors will be able to do this on your behalf.
10. Amend Registrations

You can change your study pattern term dates by clicking on the drop down menu and selecting the relevant study pattern that you have created (to edit your study patterns please see section 4c). Remember to press Submit after updating any learner registration details.

You cannot edit the Payment Start Date for a learner. To do this, please contact the Learning Provider helpline on 0845 600 7979 and one of our advisors will be able to do this on your behalf.

For EMA FE only: You must have completed Contract Part 2 with the learner and tick this box before EMA FE Bonus can be confirmed. This can also be recorded when Registering Learners (section 5) or Record EMA FE Bonus (section 7)

Remember to press Submit after updating any learner registration details to ensure all changes to a learner’s details will be recorded and saved on the system.

To search for and amend other learners’ registration details, click on the ‘Back to List Page’ link.
11. Learners Report

To view a list of all the Registered Learners for your Learning Provider, you can produce a report. The report will also show any migrated 2007/08 registered Learners from the previous supplier. To access a Registered Learner Report, please click on the eighth tab along the top of the screen, labelled ‘Learners Report’ and follow the instructions below.

Interim LPP version 3 has an additional column in the Learner Report – EOL (End of Learning). This column displays the reason for and date of EOL.

To filter your report by a Learner’s LURN, please enter the 12 digit LURN in the blank text box provided. If you have registered a Learner using a MN number, you can also enter this and filter Learners accordingly.

To filter your report by a Learner’s name, enter the Learners Forename and Surname in the blank text boxes provided.

Once you have entered either the LURN or the learner name or both, you must click ‘Filter’ to display the appropriate Registered Learner.

If you wish to check another Learner’s registration details, you must click on the ‘Reset Filter’ button and repeat steps 1-3 above.
12. Third Party Interface

- Third Party Interface (3PI) will work with version 3 of the Interim LPP.

- All of your XML messages will be automatically forwarded from the existing EMASYS IP address to the new url: https://3pi.isclearnersupport.co.uk/3pi.

- You will be able to submit EMA FE Bonus decisions using 3PI’s

- To logon to your third party software, you should use the same Interim LPP Username and Password. Your previous Username and Password will no longer work.

- If you have not received your new Username or Password or have any questions regarding 3PI’s, please contact the Learning Provider Helpline on 0845 600 7979.