



Learning Provider Portal Quick Guide

Submit a Change of Circumstance

Please refer to section 13 of the User Guide for full and detailed instructions on Change of Circumstances.

When a learner's circumstance changes, SLC should be notified as soon as possible to ensure that payments made are correct avoid overpayments.

The CoC will be processed automatically once it is submitted to SLC. SLC will update the learner's information and adjust their Advanced Learner Loan entitlement if required. SLC will send the learner confirmation of their updated application information.

User Roles and Contacts

Users need to be assigned the following user roles to access the coc area of the Applicant Information Service

- Learning Provider Change of Circumstance Administrator
- Learning Provider Change of Circumstance Advisor

Please refer to section 2, Learning Provider User Roles of the User Guide for further details of these user roles.

A coc contact will also need to be created. Please refer to section 6, Maintain Learning Provider Contacts of the User Guide for guidance on creating and maintaining contact information.

CoCs can be created for;

- A single learner with a single change
- A single learner with multiple changes
- Multiple learners with a single change
- Multiple learners with multiple changes

Pre liability coc

Applications will need to be at one of the following workstages to perform a coc

- Approved
- Approved Awaiting Signature
- Ineligible
- Cancelled

For full details of Pre liability coc types please refer to Section 13.6 of the User Guide

Pre liability cocs can be created using different sections of the portal

Detailed Learner Information Screen

1. After selecting a learner within the Learner Information Home section on the Detailed Learner information page select create coc

The screenshot shows the 'Detailed Learner Information' screen in the Learning Provider services portal. The page header includes the logo for 'LEARNING PROVIDER services' with the tagline 'Partnering with Colleges and Training Organisations' and the user information 'You are administering: 10000238 ALLIANCE LEARNING'. The navigation menu contains 'Home', 'Maintain Groups', 'Administer User', 'Learning Provider Details', and 'Applicant Information Service', with 'Sign out' in the top right corner.

The main content area is titled 'Detailed Learner Information' and features an 'Expand All' button. A 'Learner Information' section is expanded, displaying the following details:

Full name	MARK EXT14
Date of Birth	12/06/1981
Sex	Male
Customer Reference Number	01083648983
ULN	
<input type="text" value="8312617689"/>	
Additional Ref No.	<input type="text"/>
Address Line 1	STUDENT LOANS CO LTD
Address Line 2	100 BOTHWELL STREET
Address Line 3	
Town	GLASGOW
County	
PostCode	G2 7JD
NINO Verified Flag	No
Group Name	<input type="button" value="Assign Group"/>

At the bottom of the 'Learner Information' section are 'Submit Changes' and 'Cancel x' buttons. Below this are two collapsed sections: 'Assessment Information' and 'Current Payment Schedule & Attendance'. At the very bottom of the screen are 'Create CoC' and 'Back' buttons.

- The Create CoC screen will appear to confirm the learners that have been selected, select next

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering:10000238 ALLIANCE LEARNING

Home Maintain Groups Administer User Learning Provider Details Applicant Information Service Sign out

Create CoC

▼ Learner Details

You have selected 1 learner application to apply this CoC to.

▼ Learner Information Details

Full Name	ULN	Additional Ref No	Learning Aim
MARK EXT14	8312617689		Diploma in Health & Social Care (Adults) for England (QCF), QCF Diploma (50111942)

Displaying Page 1 of 1, 1 records found

Next Cancel x

HELP

- Select the CoC type required from the Available Types and select Add

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering:10000238 ALLIANCE LEARNING

Home Maintain Groups Administer User Learning Provider Details Applicant Information Service Sign out

Create CoC

▶ Learner Details

▼ Change of Circumstance

Available Selected

Early Completion → Add

Withdrawal → Add All

Suspension ← Remove

Resumption ← Remove All

Fee Charged

Learning Aim Details

Loan Requested

Next Back

HELP

Please refer to section 13.6 of the User Guide for guidance on how to select the CoC type required.

4. Select next and enter the effective date for the changes

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering: 10000238 ALLIANCE LEARNING

Home Maintain Groups Administer User Learning Provider Details Applicant Information Service Sign out

Create CoC

- ▶ Learner Details
- ▶ Change of Circumstance
- ▼ Change of Circumstance Details

Change Loan Requested

Decrease Loan Requested?
 Yes No

Effective Date

11 / 09 / 2015

Next Back

HELP

5. Select the appropriate radio button to choose a contact for the coc

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering: 10002327 ESSEX COUNTY COUNCIL

Home Learning Provider Details Applicant Information Service Sign out

Create CoC

- ▶ Learner Details
- ▶ Change of Circumstance
- ▶ Change of Circumstance Details
- ▼ Contact Details

Title	First Name(s)	Surname	Department	Telephone Number	Email Address	
Dr	alan	john	cpc	000000000	john@aol.com	<input type="radio"/>

Next Back

HELP

6. Select next and the CoC Summary screen will appear to allow you review the details of the CoC to ensure they are correct.

- If details are correct, select submit. If details are incorrect, select cancel to amend or cancel.

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering: 10002327 ESSEX COUNTY COUNCIL

Home Learning Provider Details Applicant Information Service Sign out

Create CoC

Summary
You have selected 1 learner application to apply this CoC to.

Change of Circumstance

- Loan Requested

Change Loan Requested

Decrease Loan Requested?

Loan Requested £1,000.00

Effective Date
22/05/2013

Contact Details

Title	Dr
First Name(s)	alan
Surname	john
Department	cpc
Telephone Number	000000000
Email Address	john@aol.com

Submit Cancel

HELP

CoC Search – Within the CoC Home section of the portal

- Cocs can be created by hovering over the Applicant Information Service tab, then selecting CoC Home.

LEARNING PROVIDER services
Partnering with Colleges and Training Organisations

You are administering: 10000238 ALLIANCE LEARNING

Home Maintain Groups Administer User Learning Provider Details Applicant Information Service Sign out

Learner Information Home

Learner Search Import View

Learner Information Home
CoC Home
Financials Home
Attendance Home

If you require any further assistance, you can contact the Operations Helpdesk on 0300 100... be found at <http://lpservices.slc.co.uk/>

HELP

2. Select create coc

The screenshot shows the Learning Provider Services portal. At the top, there is a logo for 'LEARNING PROVIDER services' with the tagline 'Partnering with Colleges and Training Organisations'. To the right, it says 'You are administering: 10000238 ALLIANCE LEARNING'. Below the logo is a navigation bar with buttons for 'Home', 'Maintain Groups', 'Administer User', 'Learning Provider Details', and 'Applicant Information Service'. A 'Sign out' link is also present. The main content area is titled 'CoC Home' and includes a sub-menu with 'View CoC', 'Create CoC', 'CoC Worklist', 'Import CoC', 'View Import Result', and 'Reports'. A 'Pre Liability' button is highlighted in the sub-menu. Below this, there is a text box explaining the area's purpose: 'This area of the portal allows you to create and view change of circumstances and associated reports. SLC should be notified of any changes as soon as possible. If you require any further assistance, you can contact the Operations Helpdesk on 0300 100 0643 or use the guidance material which can be found at <http://lpservices.slc.co.uk/>'. A 'HELP' button is located on the right side of the text box.

3. To search for a number of learners select learner search and complete all the required fields

The screenshot shows the 'Create Pre Liability CoC' page. The main heading is 'Create Pre Liability CoC'. Below it is a 'Learner Search' section with two tabs: 'Learner Search' and 'Learning Aim Search'. A message states: 'You have learners who currently do not have a ULN'. The search criteria include: 'Academic Year' (dropdown menu with '15/16' selected), 'Additional Learning Reference Number' (text input with a 'Search for blanks' checkbox), 'Forename' (text input with a note '(Use wildcards to find more matches e.g. joh%)'), 'Surname' (text input with a note '(Use wildcards to find more matches e.g. Smi%)'), 'Date of Birth' (date picker), 'Unique Learner Number' (text input with a 'Search for blanks' checkbox), 'Customer Reference Number' (text input), 'CoC Applied?' (dropdown menu with 'Please Select' selected), 'Group Name' (dropdown menu with 'Please Select' selected), 'CoC Type Applied' (dropdown menu with 'View All' selected), and 'Number of Records to Display per Page' (dropdown menu with '25' selected). An 'Application States' panel is open, showing a list of states: 'Applications in Progress', 'Eligibility Incomplete', 'Missing Evidence', 'Approved', 'Cancelled', and 'Held Pending Budget Approval'. There are buttons for 'Add', 'Add All', 'Remove', and 'Remove All'. At the bottom, there are buttons for 'View Results', 'Export XML Results', 'Export CSV Results', 'Export Assessment History', 'Export XML Payment Schedule & Attendance', and 'Export CSV Payment Schedule & Attendance'. A 'Clear Search' link is also present.

4. To search for learners by common learning aim information, select Learning Aim Search and complete the required fields

Create Pre Liability CoC

Learner Search

Learner Search Learning Aim Search

Academic Year
Please Select

Start Date From
dd mm yyyy

Start Date To
dd mm yyyy

Learning Aim
(Use wildcards to find more matches e.g. Mat%)

End Date From
dd mm yyyy

End Date To
dd mm yyyy

Reference

Course Trainer
(Use wildcards to find more matches, e.g. A12%)
 Search for blanks

Learning Aim Type
Please Select

Course Location
(Use wildcards to find more matches, e.g. J15%)
 Search for blanks

CoC Applied ?
Please Select

CoC Type Applied
View All

Group Name
Please Select

Number of Records to Display per Page
25

View Results Export XML Results Export CSV Results Export Assessment History Clear Search

Export XML Payment Schedule & Attendance Export CSV Payment Schedule & Attendance

HELP

5. Select View Results or Export. If View Results selected, the search results will appear
6. Select the appropriate learners by clicking the tick boxes and then select create coc
7. Then follow steps 2 to 7 as described in Detailed Learner Information

Post liability coc

Applications will need to be at one of the following workstages to perform a coc

- Approved
- Ineligible
- Suspended

For full details of post liability coc types please refer to section 13.9 of the User guide

Post liability cocs can be created using different sections of the portal

Detailed Learner Information Screen

Follow Steps 1 to 7 above to select and submit the correct coc's for the correct learners

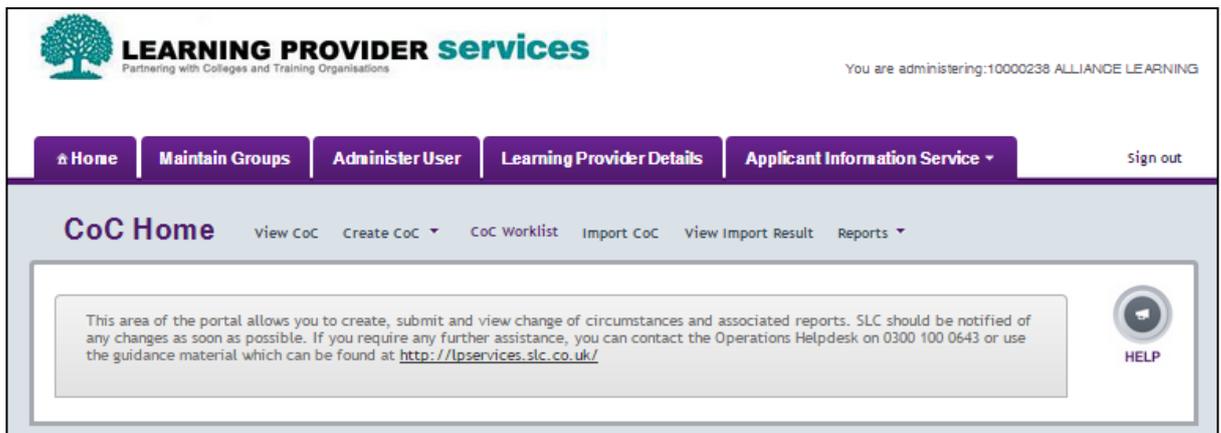
Create Pre and Post Liability CoCs via CoC Worklist

Learners will populate the CoC Worklist after attendance has been confirmed.

Not all learners who have had an attendance confirmation will fall onto the CoC Worklist, it is dependent on what type of attendance confirmation is it (initial or subsequent) as well as what the attendance or none attendance reason is.

- Initial Attendance Confirmation - Change of Start Date
- Subsequent Attendance Confirmation - Not in Attendance

1. Users can access the CoC Worklist by hovering over the Applicant Information Service tab, then selecting CoC Home



The screenshot displays the Learning Provider Services portal interface. At the top left is the logo for Learning Provider Services, which includes a tree icon and the text "LEARNING PROVIDER services" with the tagline "Partnering with Colleges and Training Organisations". On the top right, it states "You are administering: 10000238 ALLIANCE LEARNING". Below the header is a navigation bar with several tabs: "Home", "Maintain Groups", "Administer User", "Learning Provider Details", and "Applicant Information Service" (which is currently selected and has a dropdown arrow). A "Sign out" link is located on the far right of this bar. Underneath the navigation bar, the "CoC Home" section is active, showing a sub-menu with options: "View CoC", "Create CoC" (with a dropdown arrow), "CoC Worklist", "Import CoC", "View Import Result", and "Reports" (with a dropdown arrow). A large text box in the center of the page provides instructions: "This area of the portal allows you to create, submit and view change of circumstances and associated reports. SLC should be notified of any changes as soon as possible. If you require any further assistance, you can contact the Operations Helpdesk on 0300 100 0643 or use the guidance material which can be found at <http://lpservices.slc.co.uk/>". To the right of this text box is a circular "HELP" button with a speech bubble icon.

2. Select CoC Worklist which will be populated with any relevant learners

LEARNING PROVIDER services
Partnership with Colleges and Training Organisations

You are administering: 10000238 ALLIANCE LEARNING

Home Maintain Groups Administer User Learning Provider Details Applicant Information Service Sign out

CoC Worklist

Full Name	ULN	Additional Ref Number	Learning Aim Ref	Fee Amount	Entitlement Amount	Attendance Conf Status	
PRZEMEK BULK TWO	8323387442		00287133	£600.00	£450.00	Not in Attendance	<input type="checkbox"/>
JENNY COC 9464E	4376684235		60048463	£2,000.00	£1,900.00	Change Start Date	<input type="checkbox"/>
ADHOC PAYMENTS ONE	9263866642		00287133	£800.00	£800.00	Not in Attendance	<input type="checkbox"/>
PRZEMEK REG A1	1476464447		50033943	£455.00	£455.00	Not in Attendance	<input type="checkbox"/>
PRZEMEK REG A2	2297581148		50033943	£455.00	£450.00	Not in Attendance	<input type="checkbox"/>
PRZEMEK REG A7	7913849222		00287133	£0.00	£0.00	Not in Attendance	<input type="checkbox"/>
PRZEMEK REG C7	7995842421		00287133	£1,100.00	£1,000.00	Not in Attendance	<input type="checkbox"/>
FFSFSFS SDFFSFSFS	4123242854		50033943	£800.00	£800.00	Not in Attendance	<input type="checkbox"/>
CUPA SOUP 9957	8813232607		50026252	£2,000.00	£724.00	Not in Attendance	<input type="checkbox"/>
JENNY STEP 12 9957	5506393201		60007606	£2,000.00	£1,645.00	Not in Attendance	<input type="checkbox"/>
GARY SUPPORT TEST 1708		55555555555555555555	50077132	£1,000.00	£1,000.00	Not in Attendance	<input type="checkbox"/>
GARY TEST START DATE	9826992916		60003649	£800.00	£800.00	Change Start Date	<input type="checkbox"/>
SUPPORT TEST 1773	9229045828		00287133	£1,000.00	£800.00	Not in Attendance	<input type="checkbox"/>

Displaying Page 1 of 1, 13 records found

Number of Records to Display per Page: 25

Create CoC Delete

3. Select the relevant learners by selecting the correct tick box and select create coc
4. Follow steps 2 to 7 as per guidance under detailed learner information

Bulk Import - Within the CoC Home section of the portal

Users have the facility to import and submit CoC data from XML files for up to 500 learners for an AY.

1. Hover over the Applicant Information Service tab, select CoC Home.
2. Select Import Coc's and then select Choose file



CoC Bulk Upload

CoC Bulk Upload

Please specify a file (xml): No file chosen



HELP

Contact Details

Title	First Name	Surname	Department	Telephone Number	Email	
Brigadier	First	Contact	dogjae	01415571110	aojf@aoj.com	<input type="radio"/>

3. To select the CoC file to be imported, follow the on screen prompts specific to your system
4. Select a contact for this CoC by selecting the radio button
5. Select submit. The file upload summary will be displayed.
6. Select Back to CoC Home. The submitted CoC Bulk Import data file format will be validated, and the results will be displayed to confirm successes and failures

If any CoC submissions fail, these will be itemised to allow users to view and subsequently amend the XML file if appropriate.