

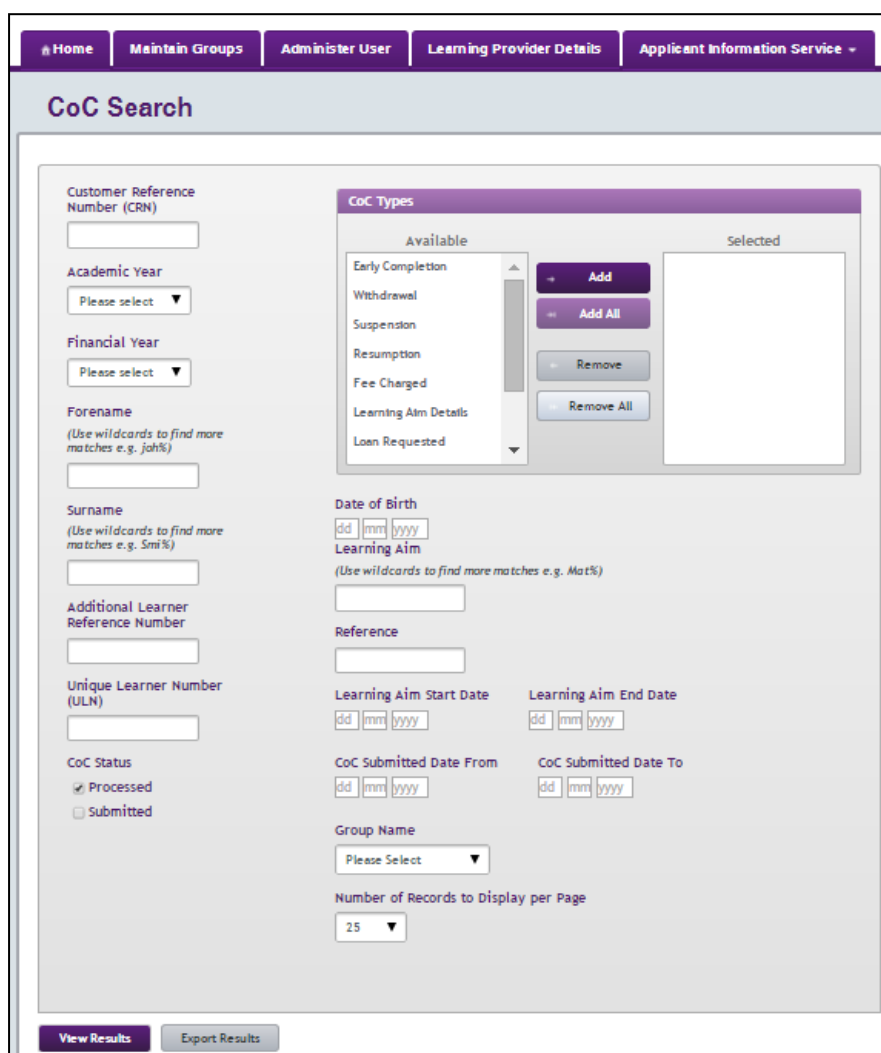
# Learning Provider Portal Quick Guide

## View submitted Change of Circumstance

Please refer to section 13.14 of the User Guide for full and detailed instructions on how to View submitted Change of Circumstances.

LP CoC Advisor and Administrator Users are able to search previously submitted CoCs

1. Hover over the Applicant Information Service tab, select CoC Home, then View CoCs
2. Enter criteria appropriate to search



The screenshot shows the 'CoC Search' interface within the Learning Provider Portal. At the top, there is a navigation bar with tabs: Home, Maintain Groups, Administer User, Learning Provider Details, and Applicant Information Service. The 'Applicant Information Service' tab is active, and the 'CoC Search' sub-section is selected.

The search interface includes the following fields and controls:

- Customer Reference Number (CRN):** A text input field.
- Academic Year:** A dropdown menu with 'Please select' as the current selection.
- Financial Year:** A dropdown menu with 'Please select' as the current selection.
- Forename:** A text input field with a note: '(Use wildcards to find more matches e.g. Joh\*)'.
- Surname:** A text input field with a note: '(Use wildcards to find more matches e.g. Sm\*)'.
- Additional Learner Reference Number:** A text input field.
- Unique Learner Number (ULN):** A text input field.
- CoC Status:** Two radio buttons: 'Processed' (checked) and 'Submitted'.
- Date of Birth:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- Learning Aim:** A text input field with a note: '(Use wildcards to find more matches e.g. Mat\*)'.
- Reference:** A text input field.
- Learning Aim Start Date:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- Learning Aim End Date:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- CoC Submitted Date From:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- CoC Submitted Date To:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- Group Name:** A dropdown menu with 'Please Select' as the current selection.
- Number of Records to Display per Page:** A dropdown menu with '25' as the current selection.

At the bottom of the search area, there are two buttons: 'View Results' and 'Export Results'.

- Select View Results or Export. If View Results is selected, the results will appear below the search

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### CoC Search

Customer Reference Number (CRN):

13/14

Forename (Use wildcards to find more matches e.g. J\*H\*):

Surname (Use wildcards to find more matches e.g. S\*H\*):

Additional Learner Reference Number:

Unique Learner Number (ULN):

CoC Status:  Failed  Processed  Submitted

Date of Birth: dd mm yyyy

Learning Aim (Use wildcards to find more matches e.g. Mat\*):

Reference:

Learning Aim Start Date: dd mm yyyy  Learning Aim End Date: dd mm yyyy

CoC Submitted Date From: dd mm yyyy  CoC Submitted Date To: dd mm yyyy

Number of Records to Display per Page: 25

**CoC Types**

Available		Selected
Learning Aim Details	<input type="button" value="Add"/>	Fee Charged
Loan Requested	<input type="button" value="Add All"/>	
Learning Provider	<input type="button" value="Remove"/>	
Cancel Application	<input type="button" value="Remove All"/>	
Reinstate Application		

[Clear Results](#)

**CoC Search Results**

Fullname	ULN	Add Learner Ref	Date of Birth	CoC Type	CoC Status	Submitted By	Submitted Date/Time
<a href="#">DEFECT 2911</a>			15/05/1988	Fee Charged	Processed	000e8	22/05/2013 00:00
<a href="#">MARTIN BROWN</a>			05/07/1985	Fee Charged	Processed	000e8	22/05/2013 00:00
<a href="#">LPTST FOUR</a>			12/02/1985	Fee Charged	Processed	000e8	18/05/2013 00:00

- Selecting any of the result headers will reorder the results in the following way:
  - Full Name, Add Learner Ref and Created By will be ordered alphabetically and then numerically.
  - CoC Type and CoC Status will be ordered alphabetically
  - ULN will be ordered numerically
  - Created Date Time will be ordered by Date and then Time

5. The Full Name hyperlink will take the user to the CoC Summary screen

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### CoC Search

Summary

Change of Circumstance

- Fee Charged

Change Fee Charged

Fee Charged	£550.00
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Effective Date

Start Date	22/05/2013
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Contact Details

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

CoC Home

HELP

6. If Export is selected, the CoC Results Export will appear below the search

CoC Results Export

Enter your filename

Fee Charged CoC

Export Results

Cancel x

7. Select Export Results and enter your filename

## Submissions Report

The report will detail the number of CoCs raised for each category, the total number raised and the percentage that each category represents of the total raised.

To request the report hover over the Applicant Information Service tab, select CoC Home, Reports, then Submissions Report.



Home

Learning Provider Details

Applicant Information Service

Sign out

## CoC Home

View CoC

Create CoC

Import CoCs

View Import Result

Reports

Submissions Report



HELP

1. Enter CoC Date Range
2. Choose an Academic Year or Financial Year



Home

Learning Provider Details

Applicant Information Service

Sign out

## CoC Submissions Report

1. Enter a CoC Date Range

CoC Submitted From

dd mm yyyy

CoC Submitted To

dd mm yyyy

2. Choose an Academic or Financial Year for active applications

Select

Financial Year

Select

Create Report

Clear Search



HELP

3. Click Create Report, the CoC Submissions Report pop up will appear

The screenshot shows the 'Learning Provider services' interface. At the top left is the logo and text 'LEARNING PROVIDER services Partnering with Colleges and Training Organisations'. At the top right, it says 'You are administering: LP0001 Falkirk College'. Below this is a navigation bar with 'Home', 'Administer User', 'Learning Provider Details', and 'Applicant Information Service'. A 'Sign out' link is on the far right.

### CoC Submissions Report

1. Please Enter a CoC Date Range

CoC Submitted From: 10 10 2012  
CoC Submitted To: 10 06 2013

2. Please Enter Academic Year or Financial Year if Required

CoC Submissions Report

CoC Types

Learning Aim Details	Fee Charged	Loan Requested	Cancel Application	Reinstate Application	Learning Provider	Total
73 (27.14%)	100 (37.17%)	37 (13.75%)	13 (4.83%)	9 (3.35%)	31 (11.52%)	269

Buttons: Create Report, Clear Search, Cancel