



Learning Provider Portal Quick Guide

Current Payment Schedule and Attendance Export

Please refer to section 11.3 of the User Guide for full and detailed instructions on the Current Payment Schedule and Attendance Report.

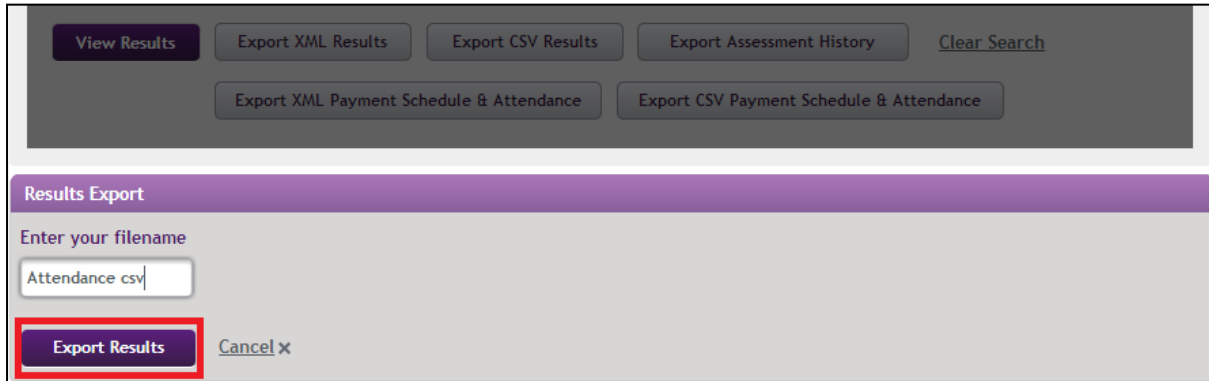
Within the 'Learner Search' and 'Learner Information Results screen' of the Learning Provider Portal, the Current Payment Schedule and Attendance Report can be exported in either CSV or XML format, for a number of learners.

Two options appear on the 'Learner Search' and 'Learner Information Results' screens; 'Export XML Payment Schedule & Attendance' and 'Export CSV Payment Schedule & Attendance'.

The screenshot displays the 'Learner Search' interface with the following elements:

- Navigation:** 'Learner Search' and 'Learning Aim Search' tabs.
- Message:** 'You have learners who currently do not have a ULN'.
- Filters:**
 - Academic Year: 18/19
 - Forename: (Use wildcards to find more matches e.g. joh%)
 - Surname: (Use wildcards to find more matches e.g. Smi%)
 - Date of Birth: dd mm/yyyy
 - Unique Learner Number
 - Customer Reference Number
 - CoC Applied?: Please Select
 - CoC Type Applied: View All
 - Additional Learning Reference Number: Search for blanks
 - NINO Verified?
 - Last Assessment Date From/To: dd mm/yyyy
 - Start Date From/To: dd mm/yyyy
 - End Date From/To: dd mm/yyyy
 - Group Name: Please Select
 - Number of Records to Display per Page: 25
- Application States:** A list of states (Applications in Progress, Eligibility Incomplete, Missing Evidence, Approved, Cancelled, Held Pending Budget Approval) with 'Add', 'Add All', 'Remove', and 'Remove All' buttons.
- Actions:** 'View Results', 'Export XML Results', 'Export CSV Results', 'Export Assessment History', 'Clear Search', 'Export XML Payment Schedule & Attendance', and 'Export CSV Payment Schedule & Attendance'.

To export the results directly from the 'Learner Search screen', the relevant search criteria should be entered and then either the XML or CSV option selected. A filename should be entered and then 'Export Report' selected.

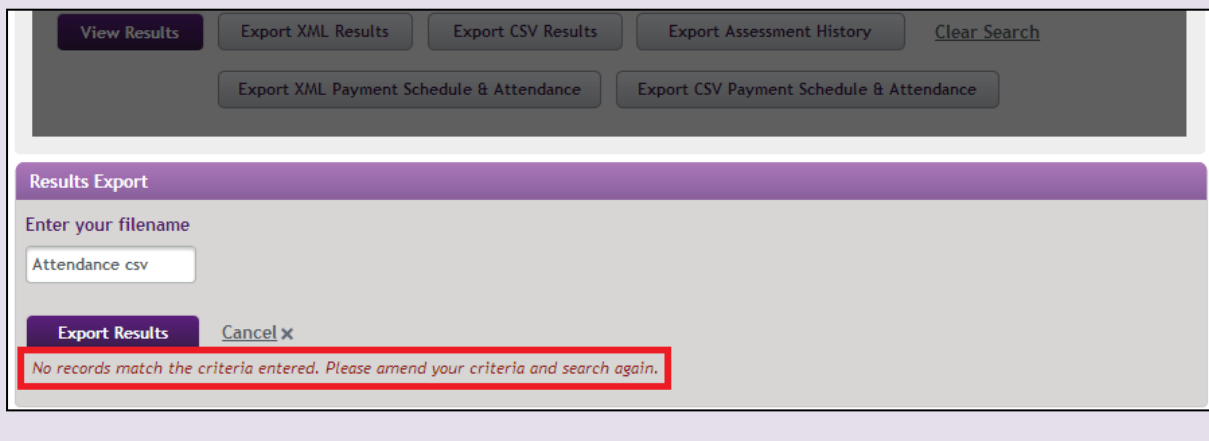


The screenshot shows a 'Results Export' dialog box. At the top, there are several buttons: 'View Results', 'Export XML Results', 'Export CSV Results', 'Export Assessment History', 'Clear Search', 'Export XML Payment Schedule & Attendance', and 'Export CSV Payment Schedule & Attendance'. Below these buttons, there is a section titled 'Results Export' with a purple header. Underneath, it says 'Enter your filename' and has a text input field containing 'Attendance csv'. At the bottom of this section, there are two buttons: 'Export Results' (highlighted with a red box) and 'Cancel x'.

Alternatively, after entering the relevant search criteria on the Learner Search screen, the 'View Results' option can be selected to first bring up the required learners on screen. The 'Export XML Payment Schedule & Attendance' or 'Export CSV Payment Schedule & Attendance' option can then be selected from the bottom of the results screen.

Note – There are no restrictions to the search criteria which can be selected for the Payment Schedule and Attendance Export, however, only those applications with a payment schedule will appear on the exported file (for example those Approved, Withdrawn, Suspended).

If none of the applications selected have a payment schedule, then an error message will appear on attempt to export as follows:



The screenshot shows the same 'Results Export' dialog box as above. The 'Export Results' button is still highlighted with a red box. Below the 'Export Results' and 'Cancel x' buttons, there is a red-bordered box containing the error message: 'No records match the criteria entered. Please amend your criteria and search again.'

CSV Export

The CSV Export will comprise of a file containing the following headings:

- Learner Surname
- Learner Forename
- Learner Date Of Birth
- Unique Learner Reference Number
- Additional Learner Reference Number
- Scheduled Payment Date
- Actual Payment Date
- Payment Amount
- Payment Status
- Payment Pended Reason
- Attendance Confirmation Date
- Attendance Confirmation Status
- Submitted By

The CSV file will comprise of one row for each scheduled payment, therefore multiple rows will appear for most learners. The data will be ordered alphabetically by learner surname.

XML Export

Details of the XML export are defined in the Current Payment Schedule and Attendance Export Schema. If you require a copy of this please contact LP_Services@SLC.co.uk