



Learning Provider Portal Quick Guide

Search and View Reassessments

Please refer to section 9 of the User Guide for full and detailed instructions on searching and viewing learner information.

Within the 'Learner Search' and 'Learning Aim Search' screens of the Learner Information section of the Learning Provider Portal, users can perform a search for learner's applications which have had a reassessment due to a CoC.

Two search fields are available within the 'Learner Search' and 'Learning Aim Search' screens;

- CoC Applied?
- CoC Type Applied

You have learners who currently do not have a ULN

Academic Year: 18/19

Additional Learning Reference Number: Search for blanks

Start Date From: dd mm yyyy

Start Date To: dd mm yyyy

Forename: (Use wildcards to find more matches e.g. joh%)

NINO Verified?:

End Date From: dd mm yyyy

End Date To: dd mm yyyy

Surname: (Use wildcards to find more matches e.g. Smi%)

Last Assessment Date From: dd mm yyyy

Last Assessment Date To: dd mm yyyy

Date of Birth: dd mm yyyy

Unique Learner Number:

Search for blanks

Customer Reference Number:

CoC Applied?: Please Select

CoC Type Applied: View All

Group Name: Please Select

Number of Records to Display per Page: 25

Application States

Available		Selected
Applications in Progress	→ Add	
Eligibility Incomplete	→ Add All	
Missing Evidence		
Approved	← Remove	
Cancelled		
Held Pending Budget Approval	← Remove All	

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

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

Where the 'CoC Applied' dropdown is left as the default **'Please Select'**, all applications will be returned in the search regardless of whether or not they have had a CoC applied. The 'CoC Type Applied' drop down will remain inactive.

Where **'No'** is selected from the 'CoC Applied' dropdown, only applications which have not had a CoC applied will appear in the search. The 'CoC Type Applied' drop down will remain inactive.

Where **'Yes'** is selected from the 'CoC Applied' dropdown, the 'CoC Type Applied' drop down will become active. This allows users to either leave the default as 'View All' to search for all applications where a CoC has been applied, or to select from one of the most common CoC types as follows:

- Fee Charged
- Learning Aim Details
- Loan Requested
- Learning Provide
- Cancel Application

Note – Where the ‘CoC Type Applied’ dropdown is left as ‘View All’, this will include all CoC’s, including any other CoC’s types which are not listed in the dropdown.

In order to find applications which have had a reassessment due to a CoC within a particular time period, for example the last week, the ‘Last Assessment Date To’ and ‘Last Assessment Date From’ fields can be entered in conjunction with the required ‘CoC Applied’ search criteria.

The screenshot displays the 'Learner Search' interface. At the top, there are tabs for 'Learner Search' and 'Learning Aim Search'. Below the tabs, a message states: 'You have learners who currently do not have a ULN'. The search filters are organized into several sections:

- Academic Year:** A dropdown menu set to '18/19'.
- 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. Smi%)'.
- Date of Birth:** A date picker with fields for 'dd', 'mm', and 'yyyy'.
- Unique Learner Number:** A text input field with a 'Search for blanks' checkbox.
- Customer Reference Number:** A text input field.
- CoC Applied?:** A dropdown menu set to 'Yes'.
- CoC Type Applied:** A dropdown menu with 'View All' selected, showing a list of options: 'View All', 'Fee Charged', 'Learning Aim Details', 'Loan Requested', 'Learning Provider', and 'Cancel Application'.
- Additional Learning Reference Number:** A text input field with a 'Search for blanks' checkbox.
- NINO Verified?:** A dropdown menu.
- Start Date From / End Date From:** Date pickers with 'dd', 'mm', and 'yyyy' fields.
- Start Date To / End Date To:** Date pickers with 'dd', 'mm', and 'yyyy' fields.
- Last Assessment Date From / Last Assessment Date To:** Date pickers with 'dd', 'mm', and 'yyyy' fields, highlighted with a red box. The values are '01 09 2018' and '30 09 2018' respectively.
- Application States:** A panel with two columns: 'Available' and 'Selected'. The 'Available' column lists states: 'Applications in Progress', 'Eligibility Incomplete', 'Missing Evidence', 'Approved', 'Cancelled', 'Held Pending Budget Approval', and 'Withdrawn'. The 'Selected' column is empty. Between the columns are buttons: 'Add', 'Add All', 'Remove', and 'Remove All'.
- Group Name:** A dropdown menu set to 'Please Select'.
- Number of Records to Display per Page:** A dropdown menu set to '25'.

At the bottom of the interface, 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'.