PICS MAIN CHANGES 2019/20

PICS Version 15.30 is due for release by 14/08/2019. This document is aimed at existing PICS users and outlines main changes to the software; it is not a full guide to PICS and must be read in conjunction with the ILR guidance documents and provider support manual (PSM) for the years concerned.

See also this page in our on-line help and a video of a recent Pellcomp webinar on our website.

ESFA also have a video on ILR 2019/20 changes with a related Q&A doc.

Important Note: We rely on ESFA systems to prove our data capture and processing. We test ILR data against beta versions of FIS when available but please be aware that it is liable to change and the national system (i.e. the Hub/Submit Learner Data (SLD)) may vary to it.

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PICS 15.30 SOFTWARE AND DATA UPGRADE

The new software will be available through the usual update process. Once installed the dataset will be upgraded on first login using the new software – this could take 20-45 minutes depending on size and system performance. **Do not attempt to stop or interrupt the upgrade as this could corrupt your data**. **If your copy of PICS is hosted by Pellcomp please see our blog for details on upgrading**. All PICS users must upgrade to 15.30 by the end of August.

SUMMARY OF CHANGES & ISSUES

There are only minor changes to the ILR form for 2019/20, detailed in the official ILR guidance documents. Please refer any queries on using the correct values to your contract manager/holder. See section at the front of the ILR specification for summary of changes.

ILR changes 2019/20 See page 2 Note that some changes may affect 2018/19 carry over.	Main changes:
	 • Funding Model (FM) 36 Apprenticeships Programme Aim:
	   ○ New field for Planned Off-The-Job Training hours (starts > 31/07/2019).
	   ○ Changed use for Achievement Date field.
	 • FM36 Non-levy Apprenticeships. Learner Destination & Progression data is now required for non-levy apprenticeships starting on or after 01/08/2018.
	 • FM36 Apprenticeship Standards (read ILR spec and PSM for details):
	   ○ Significant changes on dates for Planned and Actual end of Learning.

	o Changed use for Completion Status and Outcome code.
	• FM36 Apprenticeships. Actual Off-The-Job Training hours are removed from ILR but still available in PICS Learning & Contact Hours page for local tracking.
	• AEB changes relating to devolved funding: o New field for aim postcode at start date. o New fields for Devolved Area Monitoring (DAM). o Aim Source of Funding has new options for authorities in receipt of AEB.
	• ESF aims. FM70 Aims open on 31/07/2019 are migrated to new format.
PICS Processes 2019/20 Page 4	• The usual PICS processes for ILR and funding have been updated. See this video for details of cross-year working with them.
2018/19 actions Page 4	• You can process and submit data for 2018/19 year until 17th October 2019.

ILR DATA FOR 2019/20

Please see the 2019/20 ILR specification and provider support manual for full details.

SELECTED FIELD CHANGES

All learner names must be in 'Proper Case' (not UPPER CASE or lower case).

FM36 Apprenticeships

- Planned Hours (for off-the-Job training across the whole programme). New field on the Programme Aim, mandatory for all new FM36 Apprentices starting after 31/07/2019 but available for all Apprentices. Must be at least 278 hours unless programme is identified as a restart.

- Programme Aim - New field for Achievement Date has modified use - see ILR spec.

- Learner Destination & Progression data is now required for Non-levy apprenticeship leavers (i.e. FM36 & ACT=2) who start after 31/07/2018 and remain non-levy.

- For FM36 learners on Standards:
   - Significant changes to how/when to record the dates for Planned and Actual end of Learning. See ILR spec and especially PSM for details, no change required in PICS.
   - Note changed guidance re Completion Status 1 and Outcome code 8.

AEB

These changes relate mostly to the new devolved funding arrangements (excluding 19-24 Traineeships):

- Aims starting after 31/07/2019 have a new mandatory field for home postcode at aim start date, i.e. not updated if they move (PICS defaults this initially from the learner's current postcode). ESFA will also cross reference this against the aim source of funding. (also captured for Community Learning)

- Aims starting after 31/07/2019 & linked to SOF 110-116 have a new field for Devolved Area Monitoring (DAM) – see LDM codes spreadsheet on gov.uk.

- Aim Source of Funding field has new options for authorities in receipt of AEB (for devolved areas this must match the aim start postcode).

- Various value changes in other fields (see ILR spec for details).

ESF round 1 aims

FM70 aims open on 31/07/2019, where *ESF Contract Ref does not start 'ESF-5'* (and continuing into 2019/20) are migrated as follows

- Copy of original aim created, starting 01/08/2019 and with FM99.

- Original aim given End Date = 31/07/2019, Completion Status = 3 & Withdrawal Reason = 40.

OTHER PICS CHANGES

- Qualification Plans. New default values for
  Plan Elements: Source of Funding (devolved AEB), DAM (AEB).
  Programme Aim: Apprentice Planned Hours for Off-the-Job.

- AEB reporting. The new fields for devolved funding will be added where appropriate and following feedback from customers.

REMINDERS ON ILR DATA FOR 2018/19 CARRYOVER LEARNERS

Below are some reminders on things you may need to update manually for carry over learners - we can't do these updates for you as part of the upgrade.

ENTERING 2018/19 STARTS IN PICS VER 15.30

- Residual 2018/19 starts are created in PICS 15.30 using the 2019/20 format screens; use the 'Historic' page/sections for learner and aims to enter the old 2018/19 field values. *You must fill in these fields - they are part of your ILR upload*.

Learner basic details - see this 'Historic'tab:

| ILR Learner Information | PICS Episode | ILR Programme Aim | ILR Component Aims | Additional | Prior Education | Notes | LRS Client | Additional Forms | EAS | **Historic** |

Programme Aim has a 'Historic' section at the bottom of that page.

For Component Aims see this tab: Aim Start | Aim End | **Historic Details**

PLANNED LEARNING/EEP HOURS FIELDS FOR CARRYOVER FROM 2018/19

Planned hours are entered as usual for certain programmes (not apprenticeships) – this is a reminder on the actions required. Ensure your 2018/19 carryover have hours entered for all relevant years and enter hours for all starts in 2019/20. (View video)

🖱 Open the learner record and select the 'ILR Learner Information' screen.
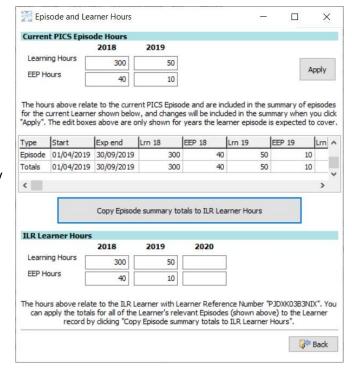
🖱 Click […] next to the Planned Learning Hours.

A learner can have multiple episodes in an academic year but hours are collected once across all of them. You enter the hours for each year, relevant to the aim dates.

🖱 Enter hours for the 'Current Episode' and click [Apply]. See the important note below on restarts/returners.

🖱 Click [Copy Episode summary totals...] to apply the hours across all relevant PICS episodes linked to this client.
The figures in 'ILR Learner Hours' will be exported to ESFA and may be used for funding.

🖱 Click [Back] to exit. The hours should now appear in the field on the page.

Use the **Learner Audit report** to show learners with no planned hours in a year (see the tab 'LearnHours').

Important note on planned hours for restarts/returners: Where a new episode is required, always enter these using the [New Episode] button for the existing client. Clicking [Apply] as above adds a new line to the upper table and the [Copy] button will copy down the total across them. (Using [New Client] for a restart creates a duplicate client record with no link to tally the hours between them. Please contact the helpdesk for guidance on fixing any duplicate client records.)

16-19 WORK EXPERIENCE AIMS CROSSING ACADEMIC YEARS (STUDY PROGRAMME & TRAINEESHIPS)

Where a 16-19 work experience aim crosses a year boundary, it must be split into two aims, one running up to July 31st and another starting on August 1st. You can identify these aims using an option in the Learner Audit Report on the Reports Switchboard - the Client Selection list also has a filter and function as below.

🖱 In the client selection screen, click [Reset Filters], select the 'More Filters' tab and use the Special Filters option 'Learners with EFA Placement Aims crossing into 2019'.

- Single click a learner in the list to select but not open the record. From the selection list menu bar run 'Main > Split Cross Year EFA Placement Aims for 2019'.
- Select the aim required for 2019/20, based on the number of hours (either the same or less than the 2018/19 aim).
- Click [OK] - a prompt reminds you to resubmit 2018/19 ILR data with the end details for the old aim.
- Click [OK]. The learner record opens to check the component aims. You should add a placement record for the new aim.

ILR PROCESSING & FUNDING 2019/20

PICS FUNDING FACILITIES 2019/20

PICS funding reports cannot be finally verified until SFA/EFA systems are fully released. Please run the funding calculators as usual but be aware that initially all financial figures for 2019/20 are our estimates and liable to recalculation

Funding Calculator	• This will produce the usual reports for the new year.
Reconcilers	Our reconcilers for FM36 Apprenticeships are liable to update as FIS and Hub/SLD facilities become available for 2019/20: • Data Match/Lock report (checks ILR against Apprenticeship Service data). • Check against Indicative/Actual funding reports. • ILR validation in FIS is waiting on new FIS release. FM35 Apprenticeships (funding starts before 01/05/2017) • PICS-FIS validation and reconciler are waiting on FIS. • PICS-PFR waiting on the Hub/SLD.

PICS ILR TOOLS AND FACILITIES 2019/20

Audit report	• Run this regularly from PICS Reports to check for anomalies.
ILR export	• Create your ILR data file and validate through FIS or Hub/SLD.
ILR print	• Prefilled 2019/20 forms can be printed using the button from the learner summary screen. • Printable blank ILR forms for 2019/20 are available from our website via this link.
Basedata	• Annual Contract Data. 2018/19 values are rolled forward to 2019/20, you can add new qualifications. You can re-run the 'roll' process manually if necessary.
ILR import 18/19 files	• Importing ILR data files via PelControl is available now for all records. • Importing from csv/xlsx files to PICS is available for new learners/episodes. • Importing ILR data files to PICS is available for new clients only.

ILR PROCESSING & FUNDING 2018/19

You have until **6.00pm 17th October 2019** to make ILR submissions for the 2018/19 year. *After that date the Hub/SLD will be closed for the year and no further uploads possible*. Please do not leave submissions until the last minute – it's much less stressful to get it done a few days before. See this video in PICS help.

FUNDING CALCULATOR, ILR EXPORTS/IMPORTS AND RECONCILIATIONS FOR 2018/19

- These processes will prompt you to select the new or previous year.
- You can create ILR data files for 2018/19 as required and submit according to the timetable. Submit a final ILR file for 2018/19 in October so that the year is closed with your latest information.
- Remember to refinal period 12-13 in the Funding Calculator for 2018/19 each time you submit a new ILR data file for that year.
- FIS is available for 2018/19. Update and run ILR data validations and funding reconciliations.
- PelControl - ILR file import. **Remember to keep and import the last file produced for all prior years, otherwise you will lose your historic data.**