



Hampshire
County Council

Hampshire Achieves

Adult Tailored Learning Data Collection Guidance Notes 2025-26

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Summary

To satisfy all the data requirements of the Department for Education (DfE) we require:

- complete course information for each course entered onto the Management Information System (MIS) including the details required for the Course Search and national Course Directory;
- venue information for each venue used for face-to-face delivery;
- tutor information for each tutor;
- learner information from the enrolment form entered onto the MIS;
- details of all learner enrolments entered onto the MIS;
- summarised Learner Evaluation information for each course (see section on Learner Evaluation);
- learner attendance entered onto the MIS within 48 hours of the completion of the course;
- learner achievement and outcome information from the HA16b form recorded on the MIS;
- Electronic copies of the HA16b form for all courses;
- Progression (learner actual destination) information for learners recorded on the MIS.

The timetable for returning the data is:

Before the start of the course – Enter detailed Course information onto the Tribal EBS – Management Information System (MIS) as soon as the details are finalised. For the majority of courses, the course information should be on the MIS in advance taking place.

Within 2 weeks after the start of the course – All enrolments are recorded on Tribal EBS MIS. For the tutor to be able to mark the register electronically, the learners need to have been entered onto the system and so this should be completed as soon as possible.

Once the enrolment forms have been processed the register marks for the tutor-added learners will need to be merged with the enrolments in EBS Shape.

During the course – Ensure all late enrolments are recorded on the MIS. Centre admin staff must enter the attendance and punctuality information on behalf of the tutor, using a paper register completed by the tutor during the session. In either case, the information must be recorded on MIS within 48 hours of the end of the session.

Completion - Record all individual learner achievement and outcome data from the HA16b on the MIS. Return a copy of the fully completed HA16b by email to the group email address, HAQuality@hants.gov.uk

Within six weeks after the completion of the course – Learners who completed a course should be contacted to gather information on their post-course progression. The information should be recorded as part of contract compliance and shared with HA.

Monthly – Enter the learner evaluation summary information for completed courses onto the ATL evaluation summary spreadsheet. Evaluations summaries should be returned for all courses (only once) and highlighted where the data has been changed.

Important Reminders

The following reminders cover common mistakes found during the verification process.

- Please do not add the ILR Funding Year to a learner address, leave the field blank

The screenshot shows the 'Learner Details' form. In the 'Address' section, the 'ILR Funding Year' field is highlighted with a red circle and a yellow background. The form includes fields for Person Code, Surname, Forename, Title, Date of Birth, NI Number, Previous Surname, Middle Names, Sex, Email Address, Mobile Number, Address Type, Address Line 1, Address Line 2, Address Line 3, City or Town, County, Postcode, Telephone, Start Date, and End Date.

- Make sure that the Qual Start and Qual End dates fields on a UIO are blank

The screenshot shows the 'UIO Details' form. The 'Qual Start' and 'Qual End' fields are highlighted with red circles and yellow backgrounds, indicating they should be left blank. The form includes fields for UI Code, Description, Status, Cal. Occ Code, End Date, End Time, Day of Week, Target Places, Target Bookable Places, Over Enrol Action, Hours per Week, Possible Hours, Achievement %, Success %, Staff Code, Unit of Length, Start Date, Start Time, Duration, Minimum Places, Trigger Places, Total Places, Total Applications, Weeks per Year, Retention Continuing %, Retention %, Room Code, and Number of Units.

- Always use the Address Search and select an address from the list rather than typing in the address

The screenshot shows the 'Learner Details' form. The 'Address' section is expanded, and the 'Search' field is highlighted with a red circle. The dropdown menu is open, showing a list of addresses. The form includes fields for Person Code, Surname, Forename, Title, Date of Birth, NI Number, Previous Surname, Middle Names, Sex, Email Address, Mobile Number, Address Type, Address Line 1, Address Line 2, Address Line 3, City or Town, County, Postcode, Telephone, Start Date, and End Date.

- Ensure all tutors record punctuality on their registers. Ensure H2050 are aware of how to record punctuality on electronic registers. Use the L mark to indicate a learner was late and record the number of minutes late (on Ontrack) or the number of minutes attended if entering attendance information centrally via ebs Shape.

Completing the Enrolment Form (EN24)

One of these forms, or an electronic version containing the same information, must be completed and signed by each learner. The signature may be a “wet” signature or electronic/digital but where an electronic/digital signature is used you must have wider systems and processes in place to assure yourself that learners exist and are eligible for funding. These forms have been designed to capture the information required by the DfE and the information you need for your own records so you must retain these forms for the retention period specified by the DfE (currently 5 years).

Acceptable evidence of electronic/digital signature includes:

- an email from the learner’s email address with details of the confirmation and their typed name at the end of the message;
- a typed name on an electronic form or document emailed from the learner’s personal email address;
- a signed scanned document attached to an email from the learner;
- a photo taken on a camera/digital medium of the signed document attached to an email from the learner.

An enrolment should be completed by each learner that attends any part of the course even if the learner later withdraws. All enrolments including those for any withdrawn learners must be recorded on the MIS. A learner who enrolls but then does not attend any sessions is considered a “non-starter” rather than to have withdrawn and the enrolment should be removed from the MIS rather than being marked as withdrawn. Once an enrolment has been included in the ILR you will need to email MIS Support (see contacts) to have the enrolment removed. Such enrolments do not affect your achievement rate and are not eligible for funding.

All enrolments should use the standard enrolment form EN24 or electronic equivalent irrespective of the course length.

Forms should be completed by the learners by the end of the first session of the course they attend. Ensure all enrolments are recorded on the MIS as soon as possible and in all cases within two weeks of the learner’s first attendance on the course.

Please encourage all learners to fully complete all pages of the enrolment form and ensure learners are aware of the Privacy Notices. Enrolment forms must be signed by the learner to indicate that they have seen the privacy notices. The Privacy Notices explain what data is collected, why and who the data is shared. If you process the data on your own system, you will need to add your own privacy notice explaining your own use of data. Providers that have migrated the enrolment form into their own enrolment process must ensure that the learners are shown all the privacy notices.

Learner Details

Please ensure that all these boxes are completed. Telephone numbers and email addresses are useful for contacting learners in case a lesson is cancelled and for collecting post-course progression information. The learner must agree to be contacted regarding progression and have provided the means to do so to enrol on any Hampshire course. The learner can control how and why they may be contacted for reasons other than providing post-course progression information by ticking the appropriate boxes in the privacy statement at the end of the enrolment form.

Date of Birth

Dates of birth are collected so that the DfE can monitor and report on provision by learners' characteristics, monitor equality and diversity, inform local and national planning, for determining learner ages on particular dates and for analysis of the age structure and profile of the learner population. The date of birth also provides validation of funding eligibility for Adult Skills funded learners. The learner's age or age range is not sufficient. Please make every effort to collect the date of birth. If a learner declines to provide a date of birth, please record that this is the case on the enrolment form to show that this information was requested. **Please do not estimate a date of birth.** Remember that a learner must normally be aged 19 or over on 31-Aug-2025 to be eligible for Tailored Learning funding in 2025-26. The only exception to this is for a parent, carer or guardian attending provision delivered through family learning.

Residency Qualification

The full rules governing learner eligibility are too complex to be summarised on the enrolment form or indeed in these guidance notes. UK nationals and other persons with right of abode, resident in areas of England outside of devolved authority areas, undertaking DfE funded Tailored Learning, that have been ordinarily resident in the UK for at least three years on the first day of learning are eligible for funding. If a learner ticks NO, then you will need further information to confirm eligibility. It is the responsibility of the provider to confirm the learner's eligibility and to ensure that the DfE's Adult Skills Fund <https://www.gov.uk/government/publications/adult-skills-fund-funding-rules/adult-skills-fund-funding-rules-2025-to-2026> are met in this and every other respect.

The 2025/26 Tailored Learning enrolment includes extra criteria in the Eligibility section as follows

Eligibility

Courses are provided free of charge to eligible learners. Please tick which of the following eligibility criteria apply:	
Do not have a Full Level 2 qualification <input type="checkbox"/>	Have a learning difficulty or disability <input type="checkbox"/>
Receive Income Support / Universal Credit <input type="checkbox"/>	Earn less than £20,319 annual gross salary <input type="checkbox"/>
Have school-aged children who qualify for Free School Meals <input type="checkbox"/>	Currently unemployed and seeking work <input type="checkbox"/>
At risk of / have mental health needs <input type="checkbox"/>	At risk of redundancy <input type="checkbox"/>
Do you have refugee status? <input type="checkbox"/>	Yes <input type="checkbox"/>
Have you been granted leave to remain in the UK under any of the following schemes	
Afghanistan <input type="checkbox"/>	Hong Kong <input type="checkbox"/>
	Ukraine <input type="checkbox"/>

The normal 3-year residency rule does NOT apply to learners granted leave to remain in the UK under the resettlement schemes in place for Afghanistan, Hong Kong or Ukraine.

To record the fact that a learner is in the UK under one of these schemes, please use the Nationality field on the Learner Details

Learner Details

Person Code 3

Surname: Whitehead Previous Surname: Middle Names: Title: MR / My Sex: M / Male Date of Birth: dd/mm/yyyy on 31/08/2023 Email Address: paul.whitehead@hants.gov.uk NI Number: Mobile Number: Address: Address Type: W (Work) ILR Funding Year: Search: Address Line 1: Four Chimneys Address Line 2: Winton Close Address Line 3: City or Town: Winchester County: Hampshire Postcode: SO32 6AB Telephone: 01962 845474 Start Date: 19/01/2017 End Date: dd/mm/yyyy

Other details

Nationality: 806 (1) English / Welsh / Scottish / Northern Irish Country of Domicile: 999 England Gender: Declared Sex: Pronouns: Learn Diff/Dis: 2 (2) Does not have learning diff/disability Restricted Use 1: Restricted Use 2: Contact Method 1: Contact Method 2: College Login: Privacy Notice Seen: 1 (1) YES Verification Type: 0 (0) None provided In Care/Care leaver: Young Carer: Lone Parent: No Eng/Maths qual: Requires Interview Assistance: Young Offender: Teenage Parent: Other Verification: Staff Code: Use Email: Place of Birth: Has Health Care Plan:

Use one of the following codes:

Afghanistan = 602

Hong Kong = 669

Ukraine = 845

To be clear, it is only when the learner has indicated they are in the UK under one of these resettlement schemes that you need to complete the Nationality field. You can ignore the field for all other learners.

Recent changes of name or address

Wherever possible a learner will be registered for a Unique Learner Number (ULN) using the information provided on the enrolment form. During the registration process, the national system will detect near matches in terms of learners with similar names, addresses or dates of birth. All such near matches need to be resolved before the ULN can be assigned. If a learner that has previously been assigned a ULN, changes their address or name then supplying the previous registered information assists in the process of finding the ULN and maintaining the accuracy of the national database.

Ethnic Monitoring

The categories are those defined by the DfE. Whilst “Roma” was added in the 2021 Census this has not yet been added to the DfE categories. They appear on the enrolment form in the order and layout recommended by the Office of National Statistics (ONS) to maximise correct completion. If a learner is unwilling to provide these details, please record this is the case on the enrolment form by asking the learner to tick the “I prefer not to say” box to show that this information was requested rather than just leaving the section blank. This will be needed for audit purposes.

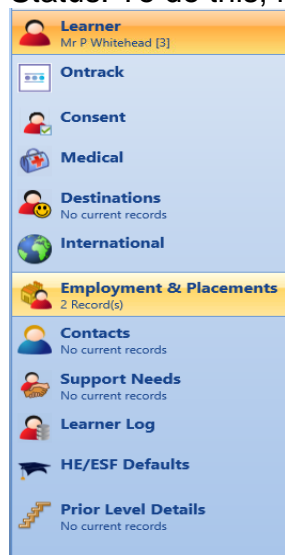
Learning Difficulty or Disability

Where a learner has indicated that they have a disability or learning difficulty that may affect their learning, please encourage them to indicate the nature of each disability or learning difficulty they have in the left-hand column and to tick ONE in the right-hand column to indicate the one they consider to be the most significant. If the learner does not wish to

reveal this information, the learner should be asked to tick the “prefer not to say” option to show that the information was withheld.

Employment Status

Once the main learner details have been saved, you will need to add the Employment Status. To do this, in the left-hand menu click on Employment & Placements



Add a new record to the lower table, Learner Employment, by clicking on “Add Employment”. If you mistakenly click on Add and find the record you are creating is in the top section, discard your changes and try again.

Organisation Code	Organisation Name	Employer ID	Organisation Type	Relationship Type	Start Date	End Date	Include in Data...	Organisation C
Unspecified	Unspecified			Employee	01/01/0001		N	
Unspecified	Unspecified			Placement	01/01/0001		N	

Employment Status	Date Status Ap...	Employer ID	Agreement ID	Employer Postc...	Self Employed?	Employment In...	Benefit Status

Fill in the fields as required

- Employment status – select value from the list

- Date Status Applies – this should be a date BEFORE the learner’s first enrolment in the academic year.
- If the learner is employed, you also need to enter the Employment Intensity and Length of Employment.
- If the learner is not employed, you need to complete the length of Unemployment field.
- In either case, enter the benefit Status field as required using one of the following values:
 - 1 – In receipt of Job Seekers Allowance
 - 4 – In receipt of Universal Credit
 - 5 – In receipt of Employment and Support Allowance (all categories)
 - 6 – In receipt of other state benefits

Leave the field blank if the learner is not in receipt of any state benefits.

Be careful not to complete the wrong field – length of Employment instead of Length of Unemployment when Unemployed or vice versa. Length of Employment is in the range 0 to 12 months while the length of unemployment ranges from 0 to 3 years+.

Course/Learning Details

This section is used to identify which course the learner has enrolled on.

Course Code

If, for any reason, the enrolment data is to be entered by Hampshire Achieves, then the course code must be added if the learner has not filled it in. Even if you are adding the information to the MIS yourselves, it would still be advisable to ensure the course code was added to make it easier for the data inputter to find the correct course.

Planned Start Date

This start date refers to the specific learner not the course as a whole. If the learner joins the course after the planned start date of the course, please specify the date on which the learner is planned to join the course.

Fee Paid

Record the fee paid by the learner on the enrolment form in the course details section. If no fee is charged for the course, please mark the fee paid box N/A. If the fee is not properly recorded on the enrolment form, it may not be possible to refund the Provider for any concession granted.

Concessions

If a learner is receiving a fee concession, evidence of their entitlement is required from the learner. You are not required to send in a copy of the evidence, just to record the reason for the concession and what kind of evidence was supplied together with the signature or initials of the person who has seen it. If the concession is not properly recorded on the enrolment form, we may not be able to refund you. Only concessions specified in the fees policy will be refunded.

Privacy Notice

Please draw the learners' attention to the Privacy Notices at the end of the form.

Signature

The enrolment form, or electronic equivalent, must be signed by the learner. In signing the form, the learner is confirming the accuracy of the details provided and that they have seen the privacy notices. The signature may be wet or electronic/digital.

- An electronic signature is defined as any electronic symbol or process that is associated with any record or document where there is an intention to sign the document by any party involved. An electronic signature can be anything from a check box to a signature.
- A digital signature is where a document with an electronic signature is secured by a process making it non-refutable. It is a digital fingerprint which captures the act of signing by applying security to a document. Usually documents which have a digital signature embedded are extremely secure and cannot be accessed or amended easily.

The enrolment form is part of the learner's Learning Agreement and a physical form with a wet signature provides the evidence that the learner exists and is eligible for funding. If an electronic/digital signature is used, you must have wider systems and processes in place to assure us that learners exist and are eligible for funding.

Eligibility Checks

The Provider should confirm the eligibility of each learner and tick the appropriate box on the enrolment form to confirm that the learner meets the requirements of the DfE Funding Rules 2025-26 AND the criteria described in Tailored Learning section of the Adult Skills Fund funding framework. The eligibility checks for all enrolments should include checking that a phone number and/or email address has been provided by the learner to enable post-course learner tracking to be carried out to determine the progression information.

Additional Notes for MIS Data Entry – Learner details

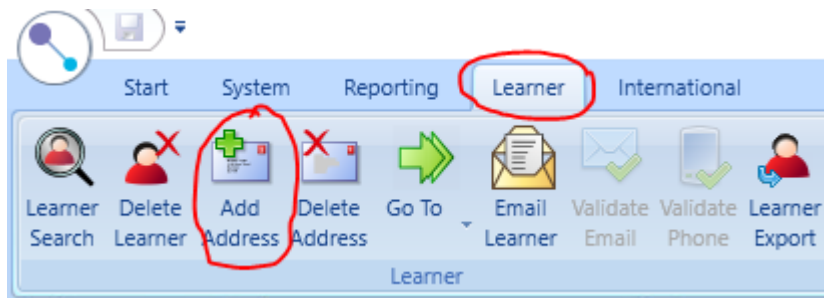
- Before adding a new learner, you should ensure you have done a thorough search to ensure that there is no existing record for the learner. Bear in mind when searching that the learner could have moved or given different information on previous enrolments. For example, a learner may have previously enrolled as Robert but has written his name as Bob on subsequent enrolments.
- The recommended procedure for ensuring the learner is not already on the MI system before adding them as a new learner is as follows:
- Before starting the search, click on the "Clear" button to ensure all previous search criteria are removed

Please enter search criteria

- Enter the learner's date of birth and press Return
- Check that none of the learners found are the learner you are looking for
- Assuming no match is found, again click on Clear to remove the date of birth and then search on Postcode.
- Assuming no matching learner is found, click on Clear again and then enter the learner surname – either partially or fully as appropriate. You can search for partial surnames by changing the “matches” in the search criteria to “starts with” or “contains” or whichever is most suitable. You change that by clicking on the dropdown next to “matches”.
- If there are a lot of matches, without first clicking on Clear, add the learner's forename (either partially or fully as above) to focus the search and again check none of the returned records are the learner you are looking for.
- Having searched on date of birth, postcode and name we can be reasonably certain there is no matching learner and so we can carry on and **Add** a new learner

Please note that you should search by one criterion at a time and so it is important to click on Clear between searches otherwise you will be searching for matches with ALL the criteria which may mean you miss near matches.

- If the learner already exists on the system, check the details and make any additions or amendments. Ensure you have recorded the information about contact permissions as these need to be refreshed for all learners following the introduction of the General Data Protection Regulations (GDPR). If there are any of the Contact Method or Restricted Use fields that have a value in a red font with the word (Inactive), you need to clear out these old values by resetting them to the values on the enrolment form or changing them to be blank.
- Do not forget to enter the learner's title. If not specified on the form use Mr or Ms as appropriate. Entering a title will also pre-populate the Gender field where possible.
- Address Type should always be Home. Work addresses should not be used; we require the learner's **home** address because the eligibility rules are based on where they live.
- You need to draw a distinction between *correcting* a learner's address and recording a *change of address* because the learner has moved house. In the first case, where there is an error in the learner's address or postcode then these should be corrected by changing the recorded address. In the second instance, where a learner has moved, do NOT change the address. Instead, you should add an address to the existing learner record using the Add Address button.



- The “Start Date” in the Address panel of the Learner details refers to the date from which this address is valid. It must be on or before the date of the first enrolment for the learner. When adding a new learner, it is recommended to use either the start of the academic year (1-Aug-2025 for academic year 2025-26) or the start of the term to avoid using a date after the start date of the course the learner has enrolled on. Do not use the date of data entry unless you are sure the enrolment is being added before the course starts.

Additional Notes for MIS Data Entry – Enrolment details

- ‘Progress date’ should be the date on which the Progress Code is first valid. When enrolling a learner and setting the Progress Code to Active it would need to be on or before the date of the first session the learner is expected to attend. When recording achievement or withdrawing a learner, it should be the date of the last session the learner attended.
- ‘Who to pay’ should be “No fee” when the course is free to the learner and “Learner” where there is a fee payable.
- If a learner enrolls on the course after the first session, you will need to use the Special Details to record the correct start date for this learner. To enable the Special Details, you need to put a tick in the box on the Special Details tab. Once you have done that the other fields will accept data. The fields you need to change are the **“Register Start Date”** and the **“ILR Aims Special Start Date”** which should be set to the date of the first session the learner is due to attend. This ensures that the learner is not considered to be absent from sessions that occurred before they enrolled on the course.
- If a learner indicates on their enrolment form that the purpose of their enrolment is something which differs from the default purpose you added to the course, then you will need to use the Special Details to override the default.

You only need to set the purpose in Special Details when the purpose for the individual learner is not the same as the default ATL Purpose you put on the course.

- If a learner has not given their date of birth, the automatic fee waiver will not apply, and you will find an unpaid fee against the learner as below and you will have to apply the waiver manually.

Course	Occurrence	Title	Prog date	Status	Unit Group Ref	Start Date	End Date	Hours
US19MATHS1	18/19	Functional Skills - Maths	24/06/2019	F		29/01/2019	25/06/2019	1.50
US19ENG2	RORO	Functional Skills - English Level 2	17/03/2020	F		12/08/2019	31/01/2020	1.50
US22BFCAS2	22/23	Using Feedback to Develop Critical Skills	18/07/2023	F		18/07/2023	18/07/2023	3.00
US22BSPS2	22/23	Presentation Skills Workshop	27/07/2023	F		27/07/2023	27/07/2023	3.00
US22W3PHRRR1	23/24	Preparation for Higher Education Academic Research, Referencing & Plagiarism	03/08/2023	F		03/08/2023	03/08/2023	3.00
US22W3PHCCR1	23/24	Preparing for Higher Education - Critical Reading and Writing Skills	10/08/2023	A		10/08/2023	10/08/2023	3.00

- To apply the waiver, click on the Payments tab, select the correct course in the top window and select the ATLFREE waiver by changing the N to a Y by clicking on it, then save your changes.

Attainments

No current records

Academic History

No current records

Enrolments

6 Record(s)

Payments

£10.00 / Unc £0.00

Fees*

Receipts

Installments

Showing All

(select)

Description

Date

Who to Pay

Fee Level

Orig Fee

Curr Fee

Adjusts

Installments

Unconf

Receipts

Outstanding

N

Admin fee for Functional Skills - Maths (18/19)

20/05/2019

N

Unit fee

£10.00

£0.00

-£10.00

£0.00

£0.00

£0.00

£0.00

£0.00

N

Admin fee for Functional Skills - English L2 (RORO)

24/07/2019

N

Unit fee

£10.00

£0.00

-£10.00

£0.00

£0.00

£0.00

£0.00

£0.00

N

Admin fee for Preparation for Higher Education - Crit

10/08/2023

N

Unit fee

£10.00

£10.00

£0.00

£0.00

£0.00

£0.00

£0.00

£10.00

Statistics

Type

Student

Sponsor

Total fees

£10.00

£0.00

Unmatched Receipts

£0.00

£0.00

Matched Receipts

£0.00

£0.00

Balance

£10.00

£0.00

Unrestricted Balance

£10.00

£0.00

Till Number

No till connected

Fee Details

Fee Date

10/08/2023

Instance Code

US22W3PHCCR1 23/24

Fee Type

Administration fee

Description

Admin fee for Preparation for Higher Education - Crit (23/24)

Who to Pay

N

(N No fees (1))

Vat Code

Standard Fee

€ 10.00

VAT Amount

£0.00

Occurrence

23/24

Funding Year

30

30 (2023 - 2024)

Sponsor

Vat Rate

Actual Fee

£ 0.00

Waivers

Waiver code

Order

cmf

Evidence

Description

Calculated by

Notes

Start date

End date

ATLFREE

N

N

N

ACJ - Free to learner

Reduce by %100.00

01/08/2023

COFUND

N

N

N

Co funded

Reduce by %100.00

01/08/2013

FULLFUND

N

N

N

Fully Funded

Reduce by %100.00

01/08/2013

Notes (0)

- You will see that the outstanding fee is reduced by 100%, so there is no longer an outstanding fee

Attainments
No current records

Academic History
No current records

Enrolments
6 Record(s)

Payments
£0.00 Unc £0.00

FeesReceiptsInstallmentsShowing All

(select)	Description	Date	Who to Pay	Fee Level	Orig Fee	Curr Fee	Adjusts	Instalments	Unconf	Receipts	Outstanding
N	Admin fee for Functional Skills - Maths (18/19)	20/05/2019	N	Unit fee	£10.00	£0.00	-£10.00	£0.00	£0.00	£0.00	£0.00
N	Admin fee for Functional Skills - English L2 (RORO)	24/07/2019	N	Unit fee	£10.00	£0.00	-£10.00	£0.00	£0.00	£0.00	£0.00
N	Admin fee for Preparation for Higher Education - C	10/08/2023	N	Unit fee	£10.00	£0.00	-£10.00	£0.00	£0.00	£0.00	£0.00

Statistics

Type	Student	Sponsor
Total Fees	£0.00	£0.00
Unmatched Receipts	£0.00	£0.00
Matched Receipts	£0.00	£0.00
Balance	£0.00	£0.00
Unrestricted Balance	£0.00	£0.00

Till Number
No till connected

Fee Details

Fee Date10/08/2023

Instance CodeUS22W3PHCCR1 23/24

Fee TypeAdministration fee

DescriptionAdmin fee for Preparation for Higher Education - Crit (23/24)

Who to PayN (N No fees (1))

Vat Code

Standard Fee£ 10.00

VAT Amount£0.00

Occurrence23/24

Funding Year3030 (2023 - 2024)

Sponsor

Vat Rate

Actual Fee£ 0.00

Notes (0)

Waivers

Waiver code	att	Order	cmf	Evidence	Description	Calculated by	Notes	Start date	End date
ACLFREE	Y	N	N	N	ACJ - Free to learner	Reduce by %100.00		01/08/2023	
COFUND	N	N	N	N	Co funded	Reduce by %100.00		01/08/2023	
FULLFUND	N	N	N	N	Fully Funded	Reduce by %100.00		01/08/2023	

- Note that you can tell whether the waiver will be automatically applied when you enrol a learner as it will appear at the bottom of the enrolment screen with the Y automatically set.

Waiver code	Alt	Evidence	Description	Notes	Calc Criteria	Start Date	End Date
ACLFREE	Y	N	ACL - Free to		Reduce by %100	01/08/2023	
COFUND	N	N	Co funded		Reduce by %100	01/08/2013	
FULLFUND	N	N	Fully Funded		Reduce by %100	01/08/2013	

Course Information

Course information should be on the system as soon as the details have been finalised. This is increasingly important as the information on EBS is used to plan observations. Do not wait until you have sufficient enrolments for a course to run before adding the details to EBS.

Courses due to be led by a new tutor, or a tutor who has not been observed in the academic year, that are entered within two weeks of the course start date, will only be approved in exceptional circumstances.

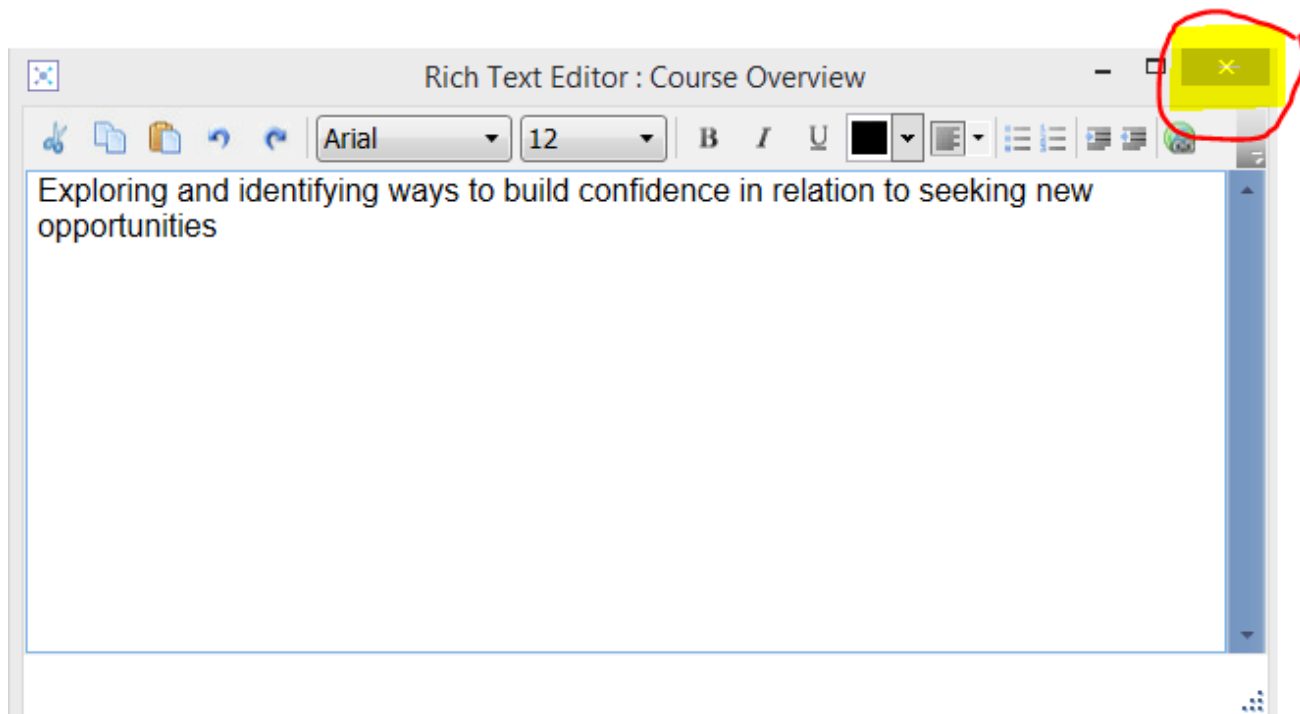
Unit Instance (UI)

- For 2025-26 providers should allocate course codes themselves following three simple rules. Course codes must:
 - be no longer than 20 characters;
 - be unique;
 - start with your two-character provider prefix to ensure uniqueness across the county.

If you are uncertain of your provider prefix, please contact MIS Support (see Contacts).

- Each course (in MIS terms 'Unit Instance' or UI) requires a unique code. If the same course is run termly then each running of the course can be created as a separate occurrence (in MIS terms, 'Unit Instance Occurrence' or UIO) of this UI. **However, I would suggest that you keep to a simple model of having a different UI for each UIO rather than having multiple UIOs using the same UI.**
- Please complete all three description fields with the course title, Short, Long and Full. The Short Description is limited to 13 characters so will often need to be an abbreviated version of the course title. The Long Description is limited to 100 characters which is ample for most purposes. Assuming your course title is less than 100 characters then the Full Description can just be cut and pasted from the Long Description. Do not include text describing the content of the course in the Full Description, just enter the course title.
- Course Overview should be completed by clicking on the EDIT button

- Enter your text in pop up window that appears and when you have finished, click on the cross



- “Owning Organisation” should always be “H2050”, use the code allocated to your organisation as the “Offering Organisation”

Unit Instance Occurrence (UIO)

- Complete the description field with the course title. I suggest you cut and paste it from the Unit Instance.
- Complete the Hours per Week and Weeks per Year fields which should then calculate the Possible Hours field. If the Possible Hours does not match what you expected, check the Hours per Week and Weeks per Year fields. Is there more than one session a week? If so the Hours per Week needs to reflect that.
- Enter the tutor in the Staff field using the search. If the tutor taking the course has not been finalised, use tutor code 14 (Jill Speirs) to indicate the tutor is yet to be arranged. Remember to change this value once the tutor has been finalised.
- Always remove the default dates from the “Qual Start” and “Qual End” fields as they are not required for Tailored Learning. This is one of the most common errors and causes problems when the ILR is verified as the Qual Start and End dates override the course start and end dates you enter when the enrolments are included in the ILR.
- On the Details screen, enter the Lot Number. Without this, the enrolments will not be counted towards your targets and so will not attract funding. If you do not know which lots you have received funding for, contact MI Support (contact details are at the bottom of this document). Please note that these lot numbers will be different each year.
- LA1 – Aims
 - Funding Year should be 32 for 2025-26,
 - Aim Type should be 4 (Aim that is not part of a programme)
 - Aim – Use the search and search for an aim that starts with Z006 with a description containing Tailored Learning

Qualification Aim Search

Recent Searches

Aim Code

matches ▼

Description

contains ▼

Level

matches ▼

Once you have entered this a first time, you will just be able to pick it from the list of recent searches. Choose the appropriate learning aim to match the subject your course from the list produced by the search above.

Code	Description
Z0060047	Non regulated Tailored Learning, Supported Learning and Independent Living
Z0060048	Non regulated Tailored Learning, First step engagement in learning
Z0060049	Non regulated Tailored Learning, Employability and transferable skills
Z0060050	Non regulated Tailored Learning, Managing mental health and well-being
Z0060051	Non regulated Tailored Learning, Vocational introduction - Health and Social Care
Z0060052	Non-regulated Tailored Learning, Entry Level, Health and Social Care
Z0060053	Non-regulated Tailored Learning, Level 1, Health and Social Care
Z0060054	Non-regulated Tailored Learning, Level 2, Health and Social Care
Z0060055	Non-regulated Tailored Learning, Entry Level, Construction
Z0060056	Non-regulated Tailored Learning, Level 1, Construction
Z0060057	Non-regulated Tailored Learning, Level 2, Construction
Z0060058	Non-regulated Tailored Learning, Entry Level, Childcare, Teaching
Z0060059	Non-regulated Tailored Learning, Level 1, Childcare, Teaching
Z0060060	Non-regulated Tailored Learning, Level 2, Childcare, Teaching
Z0060061	Non regulated Tailored Learning, Entry Level, Horticulture, Agriculture, Animal Care, Environmental Conservation
Z0060062	Non regulated Tailored Learning, Level 1, Horticulture, Agriculture, Animal Care, Environmental Conservation
Z0060063	Non regulated Tailored Learning, Level 2, Horticulture, Agriculture, Animal Care, Environmental Conservation
Z0060064	Non regulated Tailored Learning, Entry Level, Manufacturing, Engineering
Z0060065	Non regulated Tailored Learning, Level 1, Manufacturing, Engineering

Z0060066	Non regulated Tailored Learning, Level 2, Manufacturing, Engineering
Z0060067	Non regulated Tailored Learning, Entry Level, Retail, Marketing
Z0060068	Non regulated Tailored Learning, Level 1, Retail, Marketing
Z0060069	Non regulated Tailored Learning, Level 2, Retail, Marketing
Z0060070	Non regulated Tailored Learning, Entry Level, Hospitality, Catering
Z0060071	Non regulated Tailored Learning, Level 1, Hospitality, Catering
Z0060072	Non regulated Tailored Learning, Level 2, Hospitality, Catering
Z0060073	Non regulated Tailored Learning, Entry Level, Leisure Industries, Tourism
Z0060074	Non regulated Tailored Learning, Level 1, Leisure Industries, Tourism
Z0060075	Non regulated Tailored Learning, Level 2, Leisure Industries, Tourism
Z0060076	Non regulated Tailored Learning, Entry Level, Creative Industries, Media
Z0060077	Non regulated Tailored Learning, Level 1, Creative Industries, Media
Z0060078	Non regulated Tailored Learning, Level 2, Creative Industries, Media
Z0060079	Non regulated Tailored Learning, Entry Level, Digital Sector
Z0060080	Non regulated Tailored Learning, Level 1, Digital Sector
Z0060081	Non regulated Tailored Learning, Level 2, Digital Sector
Z0060082	Non regulated Tailored Learning, Entry Level, Transport, Distribution
Z0060083	Non regulated Tailored Learning, Level 1, Transport, Distribution
Z0060084	Non regulated Tailored Learning, Level 2, Transport, Distribution
Z0060085	Non regulated Tailored Learning, Entry Level, Business Administration, Legal, Finance, Marketing, Public Services and Enterprises
Z0060086	Non regulated Tailored Learning, Level 1, Business Administration, Legal, Finance, Marketing, Public Services and Enterprises
Z0060087	Non regulated Tailored Learning, Level 2, Business Administration, Legal, Finance, Marketing, Public Services and Enterprises
Z0060088	Non regulated Tailored Learning, Entry Level, Science
Z0060089	Non regulated Tailored Learning, Level 1, Science
Z0060090	Non regulated Tailored Learning, Level 2, Science
Z0060091	Non regulated Tailored Learning, Essential Skills, Pre-Entry Level, ESOL
Z0060092	Non regulated Tailored Learning, Essential Skills, Entry Level, ESOL (Entry 1)
Z0060093	Non regulated Tailored Learning, Essential Skills, Entry Level, ESOL (Entry 2)
Z0060094	Non regulated Tailored Learning, Essential Skills, Entry Level, ESOL (Entry 3)
Z0060095	Non regulated Tailored Learning, Essential Skills, Level 1, ESOL

Z0060096	Non regulated Tailored Learning, Essential Skills, Level 2, ESOL
Z0060097	Non regulated Tailored Learning, Essential Skills, Pre-Entry Level, English
Z0060098	Non regulated Tailored Learning, Essential Skills, Entry Level, English (Entry 1)
Z0060099	Non regulated Tailored Learning, Essential Skills, Entry Level, English (Entry 2)
Z0060100	Non regulated Tailored Learning, Essential Skills, Entry Level, English (Entry 3)
Z0060101	Non regulated Tailored Learning, Essential Skills, Level 1, English
Z0060102	Non regulated Tailored Learning, Essential Skills, Level 2, English
Z0060103	Non regulated Tailored Learning, Essential Skills, Pre-Entry Level, Maths
Z0060104	Non regulated Tailored Learning, Essential Skills, Entry Level, Maths (Entry 1)
Z0060105	Non regulated Tailored Learning, Essential Skills, Entry Level, Maths (Entry 2)
Z0060106	Non regulated Tailored Learning, Essential Skills, Entry Level, Maths (Entry 3)
Z0060107	Non regulated Tailored Learning, Essential Skills, Level 1, Maths
Z0060108	Non regulated Tailored Learning, Essential Skills, Level 2, Maths
Z0060109	Non regulated Tailored Learning, Essential Skills, Pre-Entry Level, Essential Digital Skills
Z0060110	Non regulated Tailored Learning, Essential Skills, Entry Level, Essential Digital Skills
Z0060111	Non regulated Tailored Learning, Essential Skills, Level 1, Essential Digital Skills
Z0060112	Non regulated Tailored Learning, Life skills: healthy eating/cooking
Z0060113	Non regulated Tailored Learning, Life skills: first aid
Z0060114	Non regulated Tailored Learning, Life skills: household budgeting, financial literacy
Z0060115	Non regulated Tailored Learning, Life skills: lipreading
Z0060116	Non regulated Tailored Learning, Life skills: British Sign Language
Z0060117	Non regulated Tailored Learning, Life skills: parenting skills
Z0060118	Non regulated Tailored Learning, Life skills: environmental sustainability
Z0060119	Non regulated Tailored Learning, Life skills: volunteering, active citizenship
Z0060120	Non regulated Tailored Learning, Life skills: managing life transitions
Z0060121	Non regulated Tailored Learning, Preparation for Access to Higher Education
Z0060122	Non regulated Tailored Learning, Humanities and social sciences
Z0060123	Non regulated Tailored Learning, Languages
Z0060124	Non regulated Tailored Learning, Creative Arts
Z0060125	Non regulated Tailored Learning, Performing Arts

Note that many of these learning aims include the Level and care should be taken to select the appropriate aim.

- Description should be the course title
- Funding Model should be 11 (Tailored Learning)
- Planned OTJ Hours – leave blank (See LA4 – Funding below)
- Funding Source should be 105 (ESFA – Adult)
- Programme Type – leave blank
- Partner UKPRN (UK Provider Reference Number) – select your UKPRN from the drop-down list. Note that HCC departments should leave this blank. Schools that are academies will find their own UKPRN on the list.
- Other fields should be left at their default values

LA2 – Aims

- ATL Purpose – Set this to the appropriate value that you anticipate will be the purpose for the majority of learners who enrol on this course. You will be able to override this on the enrolment of any learner who has a different purpose. Available values are
 1. Engaging and/or building confidence
 2. Preparation for further learning
 3. Preparation for employment
 4. Improving essential skills including English, ESOL, maths and digital
 5. Equipping parents/carers to support children's learning
 6. Health and well-being
 7. Developing stronger communities
- AFL Prov Type – Set this to 1 if the course is a Family Learning course, otherwise leave blank.
- All other fields should be ignored including **ASL Prov Type** which is no longer valid.

LA3 – HE

- Ignore all fields, these apply only to Higher Education.

LA4 – Funding

- Remember to set the **Planned Learn Hrs** field to the length of the course in guided learning hours
- Leave all other fields blanks

UIO Fees

The ILR (Individualised Learner Record) Specification for ATL changed in 2023-24 so that we are required to return a field which indicates, for each enrolment, whether the learner has contributed to the cost of their learning. This applied to Community Learning in 2023-24 and applies equally to Tailored Learning in 2024-25 onwards. As all courses are currently free to eligible learners, there is a way of setting it on the course so that it does not need to be recorded on each enrolment. This involves adding a zero charge to each course. A fee waiver is then automatically applied which removes the fee and sets the field to show that

the course is fully funded. To add the fee, click on 'Fees' under the UIO, then Add to add a new record and create a record as below.

Be sure to tick the “Include by Default” box.

This will then apply the correct waiver to all enrolments on the course for learners that give a date of birth. You will have to apply the waiver manually to any learner that does not have a date of birth on the system – see Enrolments section.

Amount payable can be changed to £0 rather than the 1p shown above as the fee waiver works just as well with a zero fee and the cost is reflected on the course search.

Informing Hampshire Achieves about any Course Changes

Providers with access to the MIS system may inform us of changes by changing the details on the system.

To cancel a course, change the course status to

INACTIVE – if the course started but has then had to be cancelled part way through
WITHDRAWN – if the course did not start.

If the course did not start, any learner enrolments on the course need to be removed. Contact MI Support to arrange this.

If the course started but was then cancelled, any enrolments should have their Progress status changed to “Withdrawn – other reason” with the progress date set to the date of the last session that took place.

If you have already created the Register Event on Shape, you will either need to delete the event (if the course never started) or de-activate the cancelled sessions (if the course started but was then cancelled before the planned end date) to ensure that the register sessions are not counted as “unmarked” against the tutor. Contact MI Support if you are unsure how to do this.

If using a copy of the CS18 to inform us of course changes, please ensure all changes are highlighted, for example by highlighting the cells that have changed to avoid making unnecessary work comparing existing course details against your new spreadsheet.

Attendance Information

Attendance for all courses must be recorded after each session by the tutor and then you will need to plan for the attendance information to be collected and entered promptly onto the MIS within 48 hours of the course finishing. A blank register proforma is available on the VLE that providers may wish to use when a paper register is necessary however, providers are free to use whatever best suits their requirements.

The attendance marks entered by the tutor are then recorded against the correct learner. This method could be used for the first session of a course where it is possible that there are a few learners that have not yet been entered onto the MIS. Contact MI Support if you are unclear how to do this. Learners entered manually by the tutor will not be funded until the enrolment form has been processed and the marks merged.

Ensure everyone who marks a register is aware of, and uses, the correct marks. In particular, that the punctuality of learners is recorded using the late mark L and recording how many minutes late on the register.

Recording Achievement and Outcome data

It is beyond the scope of this document to explain the Quality process in full but the key document from a data entry point of view is the HA16b – Tutor Record of Learner Progress and Achievement. This form should be completed by the tutor and used to inform the values entered on to EBS when recording achievement at the end of their course.

Learners that are recorded on the HA16b as having completed the course and achieved their learning objectives should have a final Progress Code of CA = Completed and Achieved. Those that are recorded on the HA16b as having completed the course but not having achieved should have the Progress code set to CC = Completed Course without Achievement. Learners who withdraw from the course should be recorded with one of the W progress codes with the precise value determined by the reason for withdrawal.

The Tailored Learning Outcome for each learner should be entered by the tutor in the Outcome column on the HA16b using one of the codes on the form. These values are also available in the Dropdown box for the “Tailored Learner Outcome” field in the Special Details of the enrolment on EBS

Code	Descriptor
1	Increased confidence
2	Improved skills for progressing to further learning
3	Improved skills for work
4	Improved essential skills (maths/English/Digital/ESOL)
5	Improved ability to support a child's learning
6	Improved physical health
7	Improved mental health and well-being

- 8 Improved skills to participate in community life
- 9 Increased understanding of democratic values
- 10 Improved skills for Independent Living
- 11 No outcome area 1-10 achieved

The Tailored Learning Outcome is held in the Special Details on EBS. You will need to activate the Special Details by ticking the box “Use Special Details” before the fields will accept data.

Please note that an outcome is required for learners that withdraw.

Enrolment Details	Special Details	Work Placements	Apprenticeship Finance	HE Details
<div>Use Special Details <input type="checkbox"/></div>				

Select the appropriate value from the drop down for “Tailored Learning Outcome”

Enrolment Details	Special Details	Work Placements	Apprenticeship Finance	HE Details
Use Special Details <input checked="" type="checkbox"/>				
Register Start Date	01/08/2018			
Mode of Attendance	1 Classroom based (1)			
Number of Weeks				
Learning Aims:				
Funding Year	31 31 (2024 - 2025)			
Funding Model				
Off The Job Actual Training Hours				
Planned Hours				
ILR Aims Special Start Date	01/08/2018			
Planned Learning Hours				
ACL Enrolment Purpose				
Tailored Learning Outcome	<div> <input type="checkbox"/> 1 - Increased confidence <input type="checkbox"/> 10 - Improved skills for Independent Living <input type="checkbox"/> 11 - No outcome area 1-10 achieved <input type="checkbox"/> 2 - Improved skills for progressing to further learning <input type="checkbox"/> 3 - Improved skills for work <input type="checkbox"/> 4 - Improved essential skills <input type="checkbox"/> 5 - Improved ability to support a child's learning <input type="checkbox"/> 6 - Improved physical health <input type="checkbox"/> 7 - Improved mental health and well-being <input type="checkbox"/> 8 - Improved skills to participate in community life <input type="checkbox"/> 9 - Increased understanding of democratic values </div>			
Learner Aim Restarted	<input type="checkbox"/>			
Advanced Learner Loan	<input type="checkbox"/>			
Funding Adjustment (RPL)				
Contract Reference Number				
Aim Type				
Programme Type				
Pathway				

Learner Post-Course Evaluation

Learner evaluations are not processed centrally so providers are not required to send in the forms. Instead, we require a summary of the evaluation data received. This summary takes the form of a spread sheet giving the responses received per course and should be sent monthly via the Provider Return.

The procedure is detailed below:

- Evaluation Forms issued to all learners at the end of each course:
 - All programmes; Form HA19
- Summary of evaluation prepared at the Centre at the end of each course (HA20)
- Centre Manager to ensure any action points from the evaluation have been addressed
- Copy of summary pro-forma retained on tutor's Course File with action plan as appropriate
- Summarised data for each course entered onto the 'end of course' overall summary spread sheet (ES23)
- New data recorded on the Spread sheet (ES23) returned as part of the Monthly ATL Provider Return
- Learner evaluations for Skills for Independent Living courses should be processed at the Centre. Centres are not required to submit summarised data for this provision but should retain this for review by Compliance and Quality team.

Learner Destination and Progression

All learners who attend an ATL funded course must be contacted within six weeks of their course ending to obtain information about their progression following the course. This is collected so the impact of programmes may be assessed.

There is a balance to be struck between contacting the learners too late so that they have no recollection of attending the course and contacting them too early so that they have not had a sufficient opportunity to make a positive progression.

We are obviously looking to portray our programmes in the best possible light so we would want to ensure we capture as much of the impact on the learners of our programme as possible. We would suggest you contact learners after 2 weeks and find out whether there is an outcome you can report. That may be that they have enrolled on another course with you or another provider, got a new job or that they have increased their working hours. If they have no positive destination or progression to report after 4 weeks then you ring them again after a further 2 weeks and, if still nothing to report, you will need to record the "None of the above" outcome.

The full list of available destinations is shown below:

- Started to look for work
- Started in a voluntary role
- Started a part-time job
- Started a full-time job
- Increased work hours
- Changed job
- Enrolled on further course to help find work
- Increased confidence to look for/find work/change career

- Unable to contact learner
- Learner contacted but no information given
- None of the above

Please note that if the learner were employed before the course and remains working in the same job, for the same number of hours per week and does not feel that the course has

increased their confidence to change jobs, we would anticipate the destination of “None of the above” would be returned. You would only return a positive destination where the learner has indicated that attending the course has, in some way, contributed to any given destination.

We are not looking to be too proscriptive regarding the number of hours per week that is considered “part-time” or “full-time,” use whichever option best fits for the individual learner.

An example script of questions you could use when speaking to the learner to determine any progression are available on the VLE.

Currently, rather than entering the progression information on EBS, you are required to return the information as part of the Provider Return. A spreadsheet **ATL Destination Tracking 2025-26** is available on the Data Collection topic of the VLE which should be used to collect the information. Every month, new information should be included in the Provider Return which you send to Hampshire 2050.

Please note that when one of the “Starting a new job” options is returned, we ask for the employment sector to be collected and returned.

Note that there are different values for when you have attempted to contact the learner using all the contact details given on the enrolment form without success [**Unable to contact learner**] and where the learner has been contacted but has withheld the information requested [**Learner contacted but no information given**].

The Privacy Notice informs the learner that by enrolling on the course they are agreeing to be contacted in this respect, so you need to ensure that as many learners as possible have provided a telephone number and/or a valid email address to enable you to contact them after the end of the course. If you do not have a telephone number or email address you are expected to contact them in writing (to supply them with a postcard for instance) to request the required information regarding progression.

Contact Information

Contract Management	Claire Allen Adult Tailored Learning (ATL) Development Manager Mobile: 07925 034 959 claire.allen@hants.gov.uk
Quality	Sue Muldowney Development Manager (Quality & Assessment) Mobile: 07701 020 441 sue.muldowney@hants.gov.uk
MIS, Data and Finance	Rich Prosser Development Manager (Funding & Information) Tel 07922 580 507 richard.prosser@hants.gov.uk

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