**Adult Tailored Learning**

**Data Collection**

**Guidance Notes 2025-26**

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# **Summary**

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

* Sub-contractor details (name, address, UKPRN)
* venue information for each venue used for face-to-face delivery;
* tutor information for each tutor;
* 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;
* 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 session;
* 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 information is sourced in a variety of ways: details of sub-contractors from the team awarding the contract, course information from the delivery team / provider and associated quality documentation, learner information from the Enrolment Form, registers and quality documentation etc.

The timetable for returning the data is:

**Immediately a contract has been awarded to a new provider** – Team awarding contract sends provider details to MIS support – Provider name, address, UKPRN. The names of tutors delivering the courses and venues to be used will also need to be notified to MIS support before any course information can be entered.

**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. The course information should be on the MIS in advance of the course taking place.

This is important as the information on EBS is used to plan lesson 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.

**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.
* Attendance and punctuality information must be entered either by the tutor with access to On-track, or by support staff 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.

# **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 check that they have been properly completed. Incomplete information could mean that the learner would not be funded. You will also need to make arrangements to 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 enrols 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. 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 EN25 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 with whom 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 needed 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 are ordinarily resident in the UK 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 to confirm their entitlement to a free course as follows:




### **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 confirm in the box provided, which 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**

The questions and response options are prescribed by the DfE. This is not itself an eligibility check, but clearly could confirm a learner’s entitlement to a free course, although this is not the purpose of this section. There are two options for ‘Not in paid employment’ to distinguish between those able and looking for work (economically active), and those who are not able or looking to work (economically inactive). Examples of the learner groups who may not be able / looking for work are: those who are retired, those with caring responsibilities at home, those prevented from accessing the employment market due to medical conditions and / or disabilities.

Once the response to the headline question ‘Are in you currently in Paid Employment’ has been selected, the associated supplementary questions MUST also be answered.

## **Course/Learning Details**

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

### **Course Code**

Enter the course code – required for data entry purposes AND document audit trail and retention.

### **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.

### **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 check the form has been **fully** completed **AND** confirm the eligibility of each learner by completing the confirmation boxes 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.

# **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 AllenAdult Tailored Learning (ATL) Development Manager Mobile: 07925 034 959claire.allen@hants.gov.uk |
| Quality | Sue Muldowney / Amy BeadellDevelopment Manager (Quality & Assessment)Mobile: 07701 020 441/ 0370 779 4129sue.muldowney@hants.gov.ukamy.beadell@hants.gov.uk |
| MIS, Data and Finance | Rich ProsserDevelopment Manager (Funding & Information)Tel 07922 580 507richard.prosser@hants.gov.uk |

Hampshire Achieves

Children’s Services Directorate, Hampshire County Council

First Floor, EII Court West,

The Castle

WINCHESTER

SO23 8UG

**Annex 1 EBS – Adding a Course**

**Annex 2 EBS – Adding and Enrolling Learners**