

Individual Training Account

Upload & Manage Courses Using the Course Management Tool

October 2017

V6

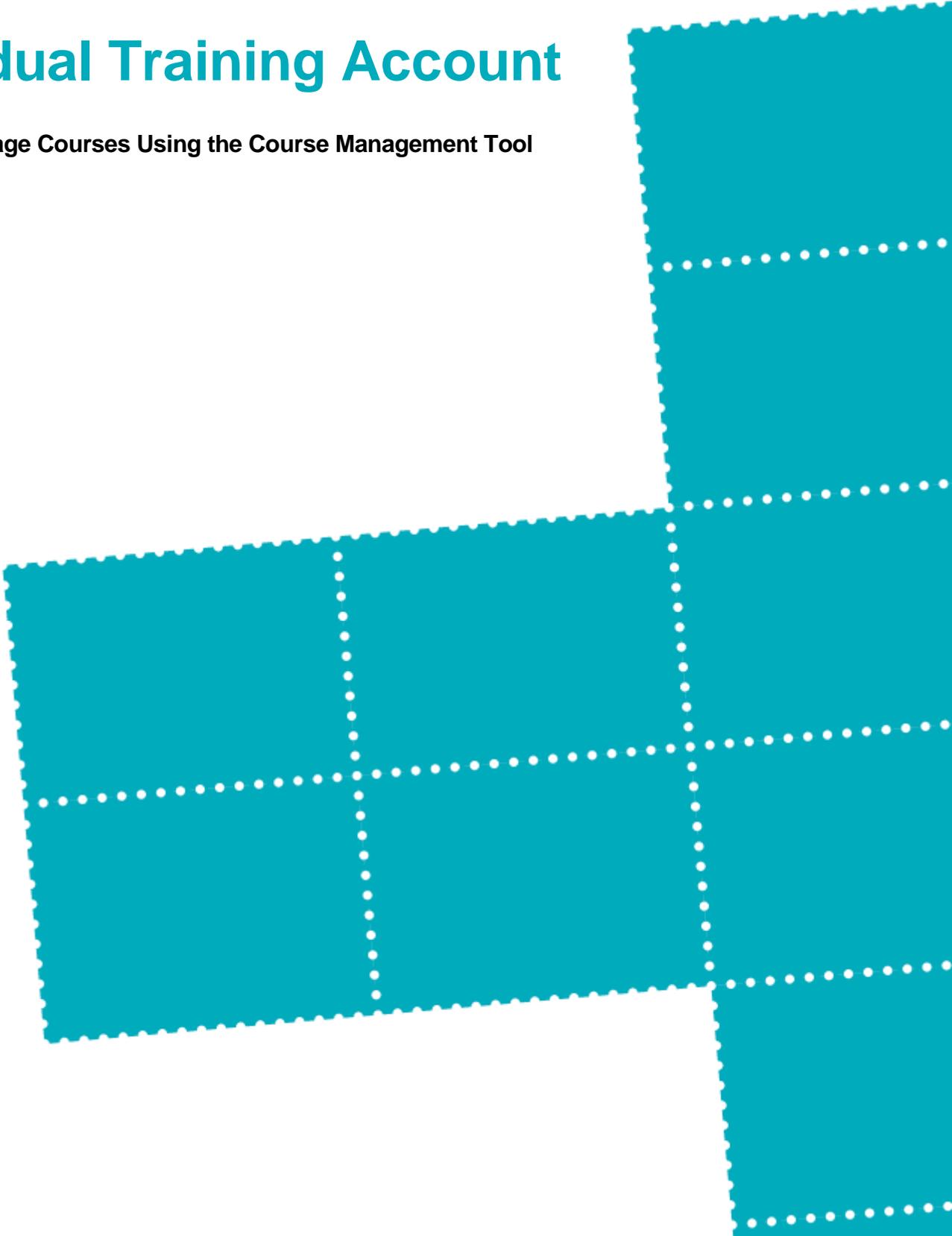


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The Course Management Tool

What it is

ITA is administered by training providers using 2 systems: the Course Management Tool and FIPS.

- **FIPS** is for registering ITA participants and processing claims for their ITA funding
- **Course Management Tool** is for managing the courses that are offered by a training provider on My World of Work. It also sends approved courses to FIPS in order for ITA claims to be made against those courses.

The Course Management Tool brings the process of uploading courses online and replaces the NLOD and PROMT systems that performed this task for the former ILA scheme.

Registering on the Course Management Tool

You can register your organisation on the Course Management Tool, and create user accounts to manage your courses. You can have as many accounts as required for each user at your organisation.

Once you have registered for an account you will receive an email confirming your registration. You will then be able to use the Course Management Tool to manage your courses on My World of Work and FIPS.

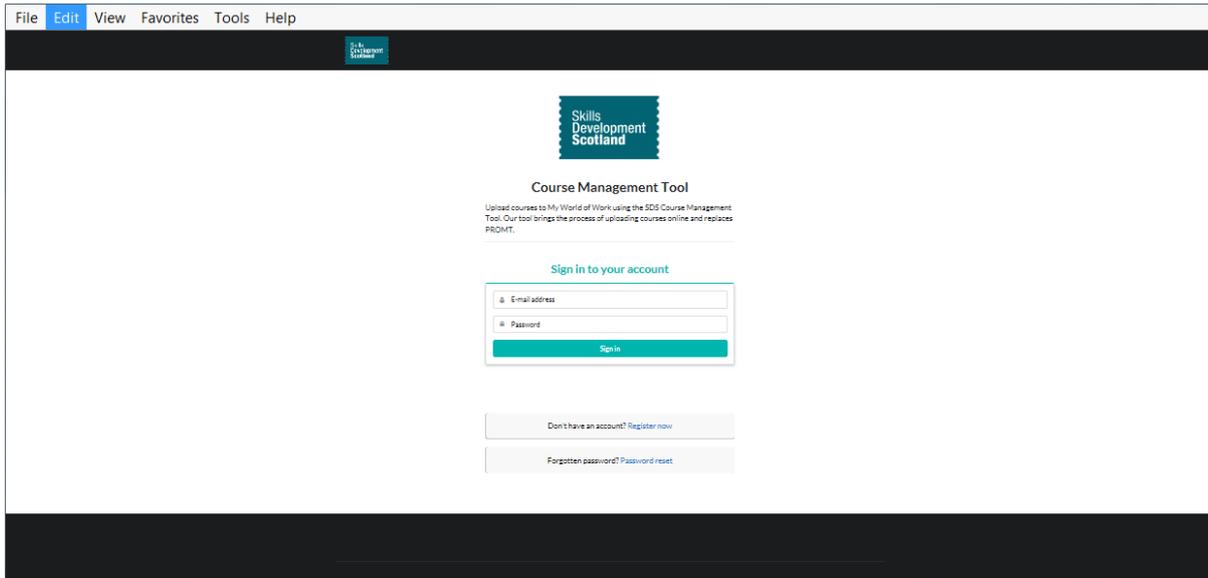
Get in touch

If you've got any further questions about the Course Management Tool, the registration process or uploading courses after reading this guide, please contact Customer Services at customer.services@sds.co.uk or call 0141 285 6100.

Upload Courses onto the Course Management Tool

1. Go to the Courses section on the Course Management Tool

- Log in to the Course Management Tool at www.courses.sds.co.uk



The screenshot shows the login page for the Course Management Tool. At the top, there is a navigation bar with 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below this is a dark header with the 'Skills Development Scotland' logo. The main content area features the 'Skills Development Scotland' logo, the title 'Course Management Tool', and a brief description: 'Upload courses to My World of Work using the SDS Course Management Tool. Our tool brings the process of uploading courses online and replaces PRCMT.' Below this is a 'Sign in to your account' section with two input fields: 'Email address' and 'Password'. A 'Sign In' button is positioned below the password field. At the bottom of the sign-in section, there are two links: 'Don't have an account? Register now' and 'Forgotten password? Password reset'.

2. Select the Courses section from the menu along the top of the page

Courses

Here you can manage [courses](#)

- A "Course" describes the title, qualification, description and entry requirements for the overall course.
- A "Presentation" is when and where that course is available, and how much it costs.

So a "Course" can have multiple "Presentations", and they can be added and removed from the edit screen for each Course.

[Add new course](#)

Company: Skills Development Scotland

User: Stewart Forrest

Account status: Approved

Course title	Training Provider	Curriculum	Qualification
<input type="text"/>	<input type="text" value="Enter the training provider name"/>	<input type="text" value="All"/> <input type="button" value="v"/>	<input type="text" value="All"/> <input type="button" value="v"/>
Created by	Created on	ITA	Status
<input type="text" value="Enter the user's email"/>	<input type="text"/>	<input type="text" value="All"/> <input type="button" value="v"/>	<input type="text" value="All"/> <input type="button" value="v"/>
<input type="button" value="Search"/>			

Brian's initial test Course for Production Environment

Training Provider
Skills Development Scotland

Eligible for ITA
No

Created by
admin@example.com

Approved

Qualification
Award at SCQF Level 1

Course ID
3

Created on
06/09/2017

[View](#) [Actions](#)

Here you can view all courses previously added, search for specific courses or add new courses.

3. Create a new course

- To create a new course click on the blue button, 'Add new course'

Create new course

New courses will be sent to our customer services team for approval. You can still add presentations on the next page while your course is being reviewed.

Course title *
Counselling Skills

Qualification *
Higher National Diploma (HND)

Course description *
Counselling skills training -
THIS FIELD SHOULD CONTAIN DETAILS OF THE COURSE AS YOU WISH IT TO APPEAR ON MYWOW

Entry requirements *
4 Highers
6 Standard Grades

Individual Training Accounts
If this course is eligible for Individual Training Account (ITA) funding then check the box below. The course will be reviewed by our customer services team to ensure that it meets the criteria for ITA.
 This course is eligible for Individual Training Account funding

Curriculum
Social care

[Create course](#)

- Enter details of the course
Note that although the Course Management Tool accepts course titles of up to 150 characters, FIPS will reject any course title that is more than 100 characters
- Press the 'Create course' button

Your course has now been created and submitted for approval by SDS Customer Services.



4. Consider how you want to display different presentation(s) of the course

Now you have created a course but in order for it to be displayed on My World of Work you need to create Presentations of the course.

Presentations are the dates and locations where you will deliver the course. Each presentation of a course will be displayed on FIPS and My World of Work and learners will apply for their chosen presentation.

For example, Emily's Training organisation wants to deliver the Counselling Skills HND 3 times a year, with start dates in September, January and April. Therefore Emily's Training has to create 3 presentations of the Counselling skills course on the Course Management Tool.

This is how approved courses uploaded through the Course Management Tool display on FIPS:

The screenshot shows the FIPS interface for a contract titled "Emily's Training - ITA - 2017". The interface includes a top navigation bar with "Workplace" and "Contracts" tabs, and a "SANDBOX" label. Below the navigation, there are utility icons for PRISM, SHARE SECURED FIELDS, EMAIL A LINK, WORD TEMPLATES, RUN REPORT, and OTHER ACTIVITIES. The main content area is divided into sections: "General" and "Courses".

General

Contract Executive	Kerr Murray	Date Active From	29/08/2017
Programme	ITA	Date Active To	--
Training Provider	Emily's Training	Contract Signatory	A Pest
TP Creditor Code	000231		

Courses

Course Title	Course Cost	Participant Contributio...	ITA Contribution	Course Duration (days)	Curriculum	Course Venue	Contract	Training Provider (Cont...	Created I
Graphic who has qualified	£100.00	£0.00	£100.00	20.00	Agriculture	Italy, G2 1dy	Emily's Training - ITA - 20...	Emily's Training	06/10/
Oxlade chamberlain squanders opportunity	£199.00	£0.00	£199.00	24.00	Construction	Grand Prix, ML8 4AX	Emily's Training - ITA - 20...	Emily's Training	06/10/
Winning the Champions League	£2,000.00	£1,800.00	£200.00	14.00	Adult Literacy & Numeracy	Belgium, G1 2DY	Emily's Training - ITA - 20...	Emily's Training	12/09/

At the bottom of the interface, there is a status bar showing "Active" and "Activated" with a "Read only" icon.

5. Create presentation(s)

On the Course Management Tool:

- Click on 'Add Presentation'
- Enter details

Add a new presentation

Presentations provide the detail of when and where the course is available, the cost and attendance requirements, and any other details you feel are necessary. Courses can have multiple presentations at different dates, times, and locations.

1 Course information
Provide the course details

2 Presentation details
Key details about this course

3 Venue
Where's the course taking place?

Delivery details

Lorem ipsum dolor sit amet, id pri alliquip corpora honestatis, putent quodsi delenit vix ne, movet evertitur voluptaria id pri. Minimum inciderint cum ex, qui modus harum legimus in.

Start date: *

2018-09-16

End date: *

2019-07-05

This presentation has a flexible end date.
Selecting this will make your course available for 1 year from the start date

Cost *

£ 300

Attendance Type

Full time Part time

Online/Self-study Part time days

Online/Self-Study with Mandatory Attendance Part time evenings

Weekends

Your reference

Counselling123

Cancel Next

The above example is for the Counselling Skills course that is to run in September. I will need to add presentations for the January & April instances of the course as well.

Note that it is possible to opt for a flexible end date by selecting the tick box if you wish to not specify particular dates for the course end, however the course must have a start date. This is the date that the course will be available from, and could be today's date.

- Press 'Next'

6. Provide details of the venue for the training

This is where you provide information about where the course will be delivered on the dates specified for this presentation of the course.

It is possible to display multiple presentations of a course, each with different delivery dates and venues.

Add a new presentation

✓ Course information
Provide the course details

✓ Presentation details
Key details about this course

3 Venue
Where's the course taking place?

Presentations provide the detail of when and where the course is available, the cost and attendance requirements, and any other details you feel are necessary. Courses can have multiple presentations at different dates, times, and locations.

Venue information
You can search for the venue's address below, or add a new venue and we'll store it for use next time.

Search for venue

Invica Office

OR

Enter venue details

Venue name *
Invica Office

Venue address *
300 Bath Street
Street address 2

Glasgow County/Region

G2 4JR

Cancel Add presentation

- You can search to see if the venue already exists in the Course Management Tool, and if it does you can select it from a list
- If the venue doesn't already exist you can enter new venue details
- Click on the 'Add presentation' button

You need to repeat this process for each presentation. Note that it is possible to copy a presentation and amend the information on each copy:

- *Course Details screen*
- *Scroll down to Presentations*

Presentation details	Venue details	Contact details	Active
Attendance type Part time evenings	ONLINE Online from participant's location	Stewart Forrest CS Manager stewart.forrest@sds.co.uk 07740337227	Edit Copy Archive
Start Date 16/09/2018	Online Self Study		View history
End Date 05/07/2019	Online Self Study		
Cost £300.00			Created on: 08/10/2017

- Use the Edit & Copy buttons as required
- If you wish to delete a presentation, press 'Archive'

7. Await approval

Your course and presentations will now be shown as 'Awaiting Approval' on the Course Management Tool.

Courses will not display on My World of Work until they have been approved by SDS Customer Services as meeting the ITA course eligibility criteria (see Appendix 2 for the Definition of Eligible Training).

The screenshot displays the 'Counselling Skills' course page in the Course Management Tool. The course is currently in an 'Awaiting approval' state, indicated by an orange button. The course details include:

- Curriculum:** Social care
- Course description:** Skills in counselling
- Qualification:** Higher National Diploma (HND)
- Entry requirements:** Highers & Standard Grades
- Eligible for ITA:** Yes
- Created by:** stewart.forrest@sds.co.uk
- Created on:** 08/10/2017

Actions available for the course include 'Approve', 'Edit', and 'Reject'. A 'View history' link is also present.

Below the course details, the 'Presentations' section is visible. It includes a description: 'Course presentations are when and where your course is available, and how much it costs. Add, edit and remove course presentations below.' and a 'Sort by: newest' dropdown menu. An 'Add presentation' button is located at the top of this section.

Two presentation cards are shown, both in an 'Active' state:

- Card 1:** Attendance type: Part time days; Start Date: 16/09/2018; End Date: 05/07/2019; Cost: £900.00; Venue: Monza, Italy; GP; Contact: Stewart Forrest, CS Manager, stewart.forrest@sds.co.uk, 07740337227.
- Card 2:** Attendance type: Part time evenings; Start Date: 16/09/2018; End Date: 05/07/2019; Cost: £900.00; Venue: ONLINE, Online from participant's location; Online Self Study; Contact: Stewart Forrest, CS Manager, stewart.forrest@sds.co.uk, 07740337227.

The SDS Customer Service team will email whoever uploaded the course to let them know if it has been approved, or if it has been rejected and the reason for rejection.

Once approved it displays on the Course Management Tool as below:

The screenshot displays the 'Counselling Skills' course page in the Course Management Tool, now in an 'Approved' state, indicated by a green button. The course details include:

- Training Provider:** Skills Development Scotland
- Eligible for ITA:** Yes
- Created by:** stewart.forrest@sds.co.uk
- Qualification:** Higher National Diploma (HND)
- Course ID:** 26
- Created on:** 08/10/2017
- Curriculum:** Social care
- Approved by:** stewart.forrest@sds.co.uk

Actions available for the course include 'View' and 'Archive'. A 'View history' link is also present.

It will also now be displayed on My World of Work and FIPS.

Manage Your Courses on the Course Management Tool

You can make all changes to courses and presentations on the Course Management Tool.

- Go to the 'Courses' section
- Use the Search fields to find the course you want to edit.

Courses

Here you can manage [courses](#)

- A "Course" describes the title, qualification, description and entry requirements for the overall course.
- A "Presentation" is when and where that course is available, and how much it costs.

So a "Course" can have multiple "Presentations", and they can be added and removed from the edit screen for each Course.

Company: Skills Development Scotland

User: Stewart Forrest

Account status: Approved

[Add new course](#)

Course title	Training Provider	Curriculum	Qualification
<input type="text"/>	<input type="text" value="Enter the training provider name"/>	All <input type="button" value="v"/>	All <input type="button" value="v"/>
Created by	Created on	ITA	Status
<input type="text" value="Enter the user's email"/>	<input type="text"/>	All <input type="button" value="v"/>	All <input type="button" value="v"/>
<input type="button" value="Search"/>			

Brian's initial test Course for Production Environment

Training Provider
Skills Development Scotland
Qualification
Award at SCQF Level 1

Eligible for ITA
No
Course ID
3

Created by
admin@example.com
Created on
06/09/2017

Approved

[View](#) [Archive](#)

- Use the Edit & Copy buttons to make changes to either the whole course or individual presentations of the course
- Use the Archive button to delete a course or presentation

Graphic: who has qualified

Curriculum
Agriculture

Qualification
Award at SCQF Level 1

Eligible for ITA
Yes

Created by
e.gasquoine@gmail.com

Created on
06/10/2017

Course description
Test

Entry requirements
Test

Approved

[Edit](#) [Archive](#)

[View history](#)

Presentations

Course presentations are when and where your course is available, and how much it costs. Add, edit and remove course presentations below.

Sort by:

[Add presentation](#)

Presentation details

Attendance type
Full time

Start Date
01/01/2018

End Date
28/02/2018

Venue details

Monza
Italy

GP

G2 1dy

Contact details

Emily Gasquoine
FIPS test manager
e.gasquoine@gmail.com
01211236548

Active

[Edit](#) [Copy](#) [Archive](#)

[View history](#)

View Your Courses on FIPS

Once you have uploaded (or amended) your course on the Course Management Tool and it has been approved by the SDS Customer Service Team you will be able to view it on FIPS.

- *Workplace*
- *Contracts (Select your organisation's ITA contract)*
- *Courses*

CONTRACT : INDIVIDUAL TRAINING ACCOUNT

Emily's Training - ITA - 2017

Training Provider: Emily's Training

General

Contract Executive: Kerr Murray
 Programme: ITA
 Training Provider: Emily's Training
 TP Creditor Code: 000231

Date Active From: 29/08/2017
 Date Active To: --
 Contract Signatory: A Pest

Courses

Course Title	Course Cost	Participant Contribution	ITA Contribution	Course Duration (days)	Curriculum	Course Venue	Contract	Training Provider (Con
Graphic: who has qualified	£100.00	£0.00	£100.00	20.00	Agriculture	Italy, G2 1dy	Emily's Training - ITA - 20...	Emily's Training
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Winning the Champions League	£2,000.00	£1,800.00	£200.00	14.00	Adult Literacy & Numeracy	Belgium, G1 2DY	Emily's Training - ITA - 20...	Emily's Training

Status Reason: Activated

Active

- Click on the course to view details and associated assignments

COURSE : INDIVIDUAL TRAINING ACCOUNT

Graphic: who has qualified

General

Course Title: Graphic: who has qualified
 Contract: Emily's Training - ITA - 2017
 Course Cost: £100.00
 VAT: £0.00
 ITA Contribution: £100.00
 Participant Contribution: £0.00
 Curriculum: Agriculture
 Course Venue: Italy, G2 1dy
 Course Duration (days): 20.00
 Qualification: Award at SCQF Level 1
 Status Reason: Taking Bookings
 Attendance: Full Time
 Owner: Emily's Training

Assignments

Individual	National Insur...	Date of Birth	ITA Contribution	Status Reason	Preferred Met...	Name (Local...	Email (Individ...	Home Phone	Mobile Phone...	Age Group	Age at Training Start	Expected End...
Tracy Sally Clarke	JM854404C	20/04/1968	£100.00	Unconfirmed Assignment	SMS	Glasgow City	wilson.tina@exa...	01736354814	07928094440		49	05/03/2018

Active

Appendix 1

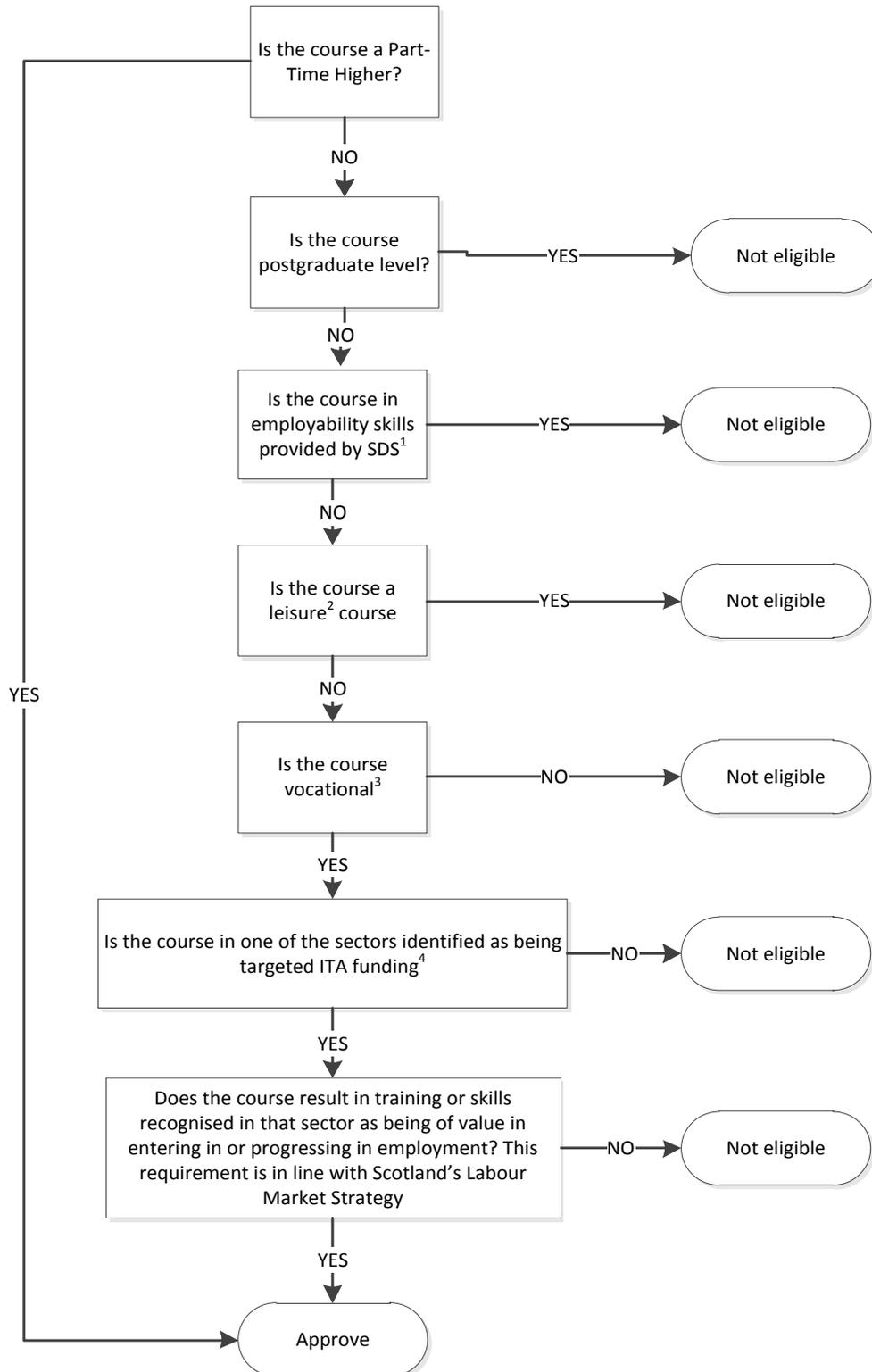
Glossary of Terms

Application:	The process of requesting funding for a particular funded course through the My World of Work website, details of which are presented in FIPS
Assignment:	The status of an individual who has been verified by the Training Provider as being eligible for ITA and subsequently booked onto a course
Claim:	The request for payment for an ITA funded course delivered by an approved training provider to an approved learner account holder
Contract:	The agreement between SDS, Scottish Ministers and a Training Provider which allows that training provider to offer ITA funded courses
Contract Signatory:	The person within the training organisation who is ultimately responsible for the delivery of ITA training
Course:	The training delivered to the learner in exchange for payment, including ITA funds
Course Management Tool:	The online tool, available on the SDS website, which allows training providers to upload and manage courses
FIPS:	Funding and Information Processing System - the system provided by SDS and used to manage all ITA payment activity
Participant:	The individual who has applied for ITA funding
Payment:	The payment that is generated when a claim is submitted
Payment Claim:	The claim submitted by a training provider for payment(s)
Presentation:	The individual instance(s) of a course, including cost and location. Every course must have at least one presentation
Proof of income:	Evidence of annual income submitted by the ITA applicant to the training provider when they are booked onto a course
Training Provider:	The individual or organisation approved by SDS to deliver ITA funded training

Appendix 2

Definition of Eligible Training

Figure one - Definition of Eligible Training



Notes to assist with Definition of Eligible Training

1. For example interview skills, CV writing
2. Leisure courses are defined as courses that have no employability element, for example arts and crafts appreciation, basic driving lessons, sports (other than coaching)
3. Education and training which aims to equip people with practical knowledge, skills and/or competences required to meet the needs of employers in particular sectors-
4. The approved sectors for ITA funding are
 - i. Adult Literacy and Numeracy
 - ii. Agriculture
 - iii. Business
 - iv. Construction
 - v. Early Years and Childcare
 - vi. Fitness, Health and Beauty
 - vii. Health and Safety
 - viii. Hospitality
 - ix. IT
 - x. Language
 - xi. Security
 - xii. Social care
 - xiii. Transport

Targeted areas are subject to change.

5. The [Scottish Labour Market strategy](#) seeks to address specific issues including:

Labour Market Issue	Learner Outcomes
Addressing Barriers	Enable equal access to an increased range of opportunities while challenging bias and systemic institutional bias: <ul style="list-style-type: none"> ➤ Provide learners from equality groups access to skills and training required to enter or progress in employment
Tackling Inequalities	Tackle inequalities in health, wellbeing and education across Scotland, including widening access to higher and further education: <ul style="list-style-type: none"> ➤ Provide learners with skills to meet sectoral or regional skills gaps
Up-skilling	Ensure that the workforce is adequately equipped with the skills that businesses need, both now and in the future: <ul style="list-style-type: none"> ➤ Provide learners with the skills or training to meet the requirements of a specific industry
Digital Technology	Ensure that our population is equipped with the necessary digital capabilities, qualifications and specialisms: <ul style="list-style-type: none"> ➤ Provide learners with digital skills
Support for Carers	Support those with caring responsibilities to participate in the labour market: <ul style="list-style-type: none"> ➤ Provide learners with skills to begin a career or progress a career as a carer.
Childcare	Support the expansion of free early Training and childcare provision: <ul style="list-style-type: none"> ➤ Provide learners with the skills to begin a career or progress a career in childcare provision.

1. Distance Training

- 1.1. To qualify for ITA funding, distance Approved Training must include a level of qualified tutor support and/or monitoring via email or telephone as deemed appropriate by SDS.
- 1.2. Without prejudice to paragraph 1.1 of this Annex A, distance Training without tutor support and monitoring, will **not** qualify for ITA funding.

2. Training that does not qualify for ITA funding

2.1. The following types of Training do not qualify for ITA funding:-

- 2.1.1. secondary education
- 2.1.2. full-time education courses
- 2.1.3. full-time higher education courses
- 2.1.4. advanced professional qualifications at SCQF 11
- 2.1.5. Training which is a statutory requirement for the individual's continuing employment
- 2.1.6. lessons towards attaining a driving licence category A or B
- 2.1.7. courses given as a reward or an inducement by an employer
- 2.1.8. private flying lessons (including fixed wing, rotary and paragliding)
- 2.1.9. diving lessons (scuba, deep sea and high board)
- 2.1.10. outward bound type courses; and leisure or sporting activities other than those that lead to a recognised coaching or teaching qualification,
- 2.1.11. postgraduate study
- 2.1.12. Employability skills provided as part of SDS' service offer e.g. CV writing, or interview skills, and any and all other Training which Scottish Ministers and/or SDS may specify in the Operational Rules from time to time.

2.2. The following definitions are applied to the exclusions set out in paragraph 6.1 of this Annex A:-

- 2.2.1. **“secondary education”** as defined in section 135(2) (b) of the Education Scotland Act 1980.
- 2.2.2. **“full-time higher education” (HE)** as defined in section 38(2) (b), (c), (d) or (e) of the Further Education and Higher Education (Scotland) Act 1992. This includes full-time degree courses offered by Universities or Colleges and courses such as Higher National Certificates, Higher National Diplomas and Diplomas of Higher Education which match the definition of full time courses. Part-time HE courses, including distance Training courses such as those offered by the Open University are not considered to be full-time higher education.

2.2.3. **“advanced professional qualifications”**, is defined as being courses leading to a professional qualification at SCQF level 9 (Ordinary degree) or above, or which are generally recognised as a graduate or postgraduate qualification by professional bodies and/or employers (e.g. many qualifications in accountancy or architecture) are excluded from ITA funding.

2.2.4. **“Training which is a statutory requirement for the individual’s continuing employment”** is defined as being any training which an employee is required by law to undertake in order to carry out the duties associated with his or her employment (e.g. certain health and safety training).

2.2.5. **“driving lessons in category A or B”** is defined as being those which lead to the award of an ordinary driving licence, other than an ordinary car or motorcycle driving licence. ITA funding may be used to gain a driving qualification which is additional to an ordinary driving licence e.g. HGV or forklift truck driving. ITA funding may also be used to gain a driving instructor qualification.

2.2.6. **“Courses given as a reward or inducement by an employer”** is defined as:

2.2.6.1. Courses provided to reward an employee (paying for, or reimbursing, the cost of any facilities or other benefits) for the performance of the duties of his or her office or employment under his or her employer or for the manner in which he or she has performed them; or

2.2.6.2. Courses which provide the employee with an employment inducement, which is unconnected with the imparting, instilling, improvement or reinforcement of knowledge, skills or personal qualities.

2.2.7. **“Leisure or sports activities”** is defined as leisure or sport activity courses other than those which specifically offer a recognised coaching or teaching qualification. Courses which could be undertaken for either leisure or vocational purposes e.g. languages or ICT must result in certification recognised, in their sector, as being of value for achieving or progressing in employment in line with the Scottish Government Labour Market Strategy

2.2.8. **“Postgraduate study”** is defined as a level of study above SCQF level 10; i.e. SCQF levels 11 and 12.

2.3. The exclusions contained in paragraph 6.1 of this Annex A are not exhaustive.