

# FIPS Modern Apprentice External Focus Group

30<sup>th</sup> April 2018

SDS, Houldsworth Room, Shandwick Place, Edinburgh (1pm to 3pm)

## Attendees

<b>Name</b>	<b>Organisation</b>
Pamela Lockhart, Manager, NTP Reports and Funding Team	Skills Development Scotland
Lindsay Hewitt, National Operations Manager	Skills Development Scotland
Andrew Bruce, NTP Reports and Funding Team Leader	Skills Development Scotland
Drew Reid, NTP Reports and Funding Team Adviser	Skills Development Scotland
Emily Gasquoine, NTP Senior Data Analyst	Skills Development Scotland
Fraser Ingram, Solutions Architect, EIS Strategy	Skills Development Scotland
Mandy Kirk	Forth Valley College
Jennifer White	JB Management (Scotland) Limited
Marissa Renucci	learndirect limited
Gillian Harvey	Scottish Electrical Charitable Training Trust
Isobel Dobson	The Intraining Group Limited
Linda Kinniburgh	The Tell Organisation Limited
Linsay Bryce	Xtra-Mile.com Ltd
Michelle Batt	MGT Training
Veronica McNeill	Limelight Careers
Helen O'Hare	CITB

## Section 1 - Welcome / Purpose of this group / Terms of Reference

- Introductions
- Overall purpose - SDS are very keen to hear from TPs around sharing their knowledge and best practises, plus also any items they want added to the agenda for these meetings.
- SDS advised that the meeting invitation will be opened out to include more than 15 TP representatives next time, and wish to hear from the staff in training organisations who are the most active FIPS users
- Agreed aim to get dates lined up for further meetings within current financial year by the end of the meeting.

## Section 2 - Reporting update

### SCQF & VQ Reporting

SDS updated the group regarding the change of reporting to SCQF levels.

All Training Providers who deliver MAs are now required to ensure that their MA programmes meet SCQF qualification criteria.

Currently SDS provide reports generated from both CTS & FIPS, however there is a plan to migrate CTS information to FIPS at some point in the coming year.

### CTS Migration

- There will be updates to the monthly TP Activity report to take into account that SDS will be reporting on SCQF levels as well as VQ levels
- Trainees already on system aiming for VQ will continue to be reported against VQ levels and new starts will be reported against SCQF levels

### MA Stats Report

- Q: Do Training Providers need stats split by Local Authority on the MA Activity report?  
A: No, just need stats split by Highlands/Lowlands.  
*NOTE – further information received after the meeting has indicated that TPs also require the current split*
- Q: Do we need to retain all details currently in reports such as age group, framework, etc?  
A: Yes, these are useful to keep in the reports.
- Q: Do Training Providers want Occupational Group included in reports as well as Framework?  
A: Yes, would be good to include Occupational Group.

## Outstanding Claims Report

Training Providers gave useful feedback in a previous meeting about the need for a report showing MAs completed and outcomes outstanding, and said that they liked the ability to view outstanding milestones clearly on CTS, but this is not possible on FIPS.

- Q: Is it possible to view just completed milestones, not including outstanding milestones?  
A: This can be achieved by viewing Claims and filtering this system view. SDS have also created an Outstanding Claims report for more in-depth information. To use this, go to Workplace/ Reports/Available Reports list, select the Outstanding Claims report and open it in Excel. You are then able to calculate outstanding value and can calculate from that how much is due for each remaining milestone in Excel, and can also filter out participants who are yet to complete in order to see only fully-funded leavers.

The following [guidance document](#) was handed out and feedback requested before SDS publish on the website.

### Action for Training Providers:

- Provide feedback on the guidance (included in this document) and whether it will assist with using the new report.

### CRM Views

There are extensive lists of system views on FIPS and many of them may not be getting used, so for ease of use, SDS are keen to provide a more concise suite of reports. A discussion was held around this and the group agreed that the next meeting should be to discuss reporting only.

### Questions re CRM Views received at the meeting included:

- Q: How do I look at active assignments for MA only?  
A: Best way is to create a personal view filtered by programme and save it (demonstration given on how to save view, name it, share it with other FIPS users, and find it in list of personal views.
- Q: How do I remove unnecessary columns from view?  
A: Demonstration given on how to add/remove columns from the personal view.

### Actions for SDS and for Training Providers prior to the next meeting:

- SDS to send out a feedback form in relation to reporting
- Training Providers to complete and return feedback form confirming which views they use and don't use

## Section 3 - Role of the NTP Hub

### NTP Hub Requests

Following on from feedback received in relation to the time taken by the NTP Hub to respond to enquiries received, SDS have reviewed the volumes and types of requests that are being received. This has highlighted timescales taken are due to:

- A high volume of non-technical requests received which should be directed to Skills Investment Advisors in the first instance after reviewing guidance materials already published on the FIPS page on the SDS corporate website.
- Training Providers sending multiple requests for the same enquiry
- Technical enquires which take longer to resolve

### **Correct process for raising queries and issues**

As above, TPs should first check the guidance materials provided on the website to ensure that the answer to their query is not already available, and then contact an SIA. Only after that should they be contacting the NTP Hub.

(Please be aware that as the NTP Hub are dealing with technical requests these will take longer to resolve than a “How-To” question.)

When contacting the NTP Hub, Training Providers should always use the FIPS [customer support request form](#) published on the SDS corporate website.

Q: What is the timescale for responses to issues raised via the issue-raising form? Sometimes we raise issues multiple times because we’ve not had a response.

A: The SLA is 4 working days, and it may take longer if SDS need to refer issues to the software developers, however going forward the NTP Hub will advise if your request needs to be escalated to system developers for resolution. Please be aware however, SDS cannot at this time send a receipt for each request received.

### **Frequently Asked Questions received by the Hub which should be handled outwith the Hub**

SDS will be adding further information to the website based on the common requests coming in. This will be published in the Announcements section on FIPS when available.

- **Contract Changes**  
SDS receive frequent queries regarding making changes to a contract, and confirm that any contract changes made must always be approved by the Contract Executive.
- **Re-sending Milestone Messages**  
SDS are not able to resend Milestone messages. If a preferred method of contact is updated and the learner misses a milestone message then they will have to wait to receive the next one when they meet the next milestone. This is because the volume

of requests for resending messages is so high that SDS do not have the capacity to manually resend. SDS advise that the stats show that 78% of validation messages receive a response from learners within 24 hours, so the validation process appears to be working quite well now.

Q: Why is it that a few learners are not getting any milestone messages despite details being correct?

A: This should be raised with SDS for further investigation.

Q: When does the message get sent to the learner?

A: It goes out when the payment leaves the Posting Run.

*Note – A previous action on SDS was to update the wording on SMS and email messages being sent to TPs and MAs following a discussion at a previous meeting of the group. SDS had held back on implementing this as there has been a significant increase in successful validations within one day of requests for validation being issued. Group members were asked if this request was still required and the feedback received was that this is no longer required.*

- **Undoing Claims**

Frequent requests are received from Training Providers asking for claims to be undone.

Unpaid Claims: SDS advises that Training Providers are able to undo unpaid claims themselves at any point before the Posting Run is issued (cut-off is 1pm on Fridays).

Paid Claims: If a Training Provider requires a paid claim to be undone then this must be done by SDS. However, this was implemented to account for exceptions rather than being received in the volumes that the NTP Hub are currently experiencing. Therefore, going forward any requests for undoing paid claims will require the Training Provider to provide full details of the reason for the undo.

- **Being unable to submit an assignment**

This is usually for one of following reasons:

- Mandatory address details missing. Training Providers must ensure the address pulled through when the application created is correct. This can be performed by using the address search facility and updating the address accordingly.
- Off-the-job training required states “Yes” and then Training Venue not provided.
- Training Category field is blank (Please note this should be populated automatically by FIPS, however occasionally it is left blank). TPs can update this by choosing “Yes” in the “Change to Training Category Required” field and then changing it back to “No”.

Feedback from group was that sometimes school information pulls through on the assignment in the wrong fields and has to be manually switched around.

### How does the group feel about FIPS now?

Feedback was unanimous from the group that they now liked the system. The following points were also noted:

- FIPS took a while to get used to but it is now working well and able to see that it has a lot of potential.
- Sometimes works slowly.
- The flow between screens can be inconvenient – for example when registering a learner with a disability you have to go back a screen and then go forward again.

### Questions & Comments

- Q: Can we change the expected end dates?  
A: There was an issue with this which has now been fixed and is being user-tested this week.
- C: The message chain can be unreadable.  
A: The NTP Hub review the unreadable messages and fix them wherever possible.
- C: We are finding temporary NI numbers getting added onto assignments unexpectedly.  
A: This is caused by a change happening in CTS but will no longer occur in the near future.
- Q: We still get a lot of Business Process Errors - what's the best process for raising them?  
A: These should be sent to the NTP Hub using the FIPS customer support request form. Please always remember to include the downloaded log file from the error message.
- Q: It is difficult to update a learner's address because we can't see their full address in the field.  
A: You can use the arrow keys to move along and view full address.
- Q: Is there a preferred browser that should be used for FIPS?  
A: IE 11 is the only browser supported by SDS for FIPS as per guidance issued. (Please see further information on the [User Permissions Application Form](#).)

### FIPS Information

SDS advise that the [FIPS page on the SDS website](#) has been updated and provides a great deal of information for Training Providers. (Please be aware this can also be found from a link on the FIPS Dashboard)

### **Action for Training Providers**

- Training Providers will shortly receive lists of all registered FIPS users for their organisation; they need to review these users and update SDS on any changes before SDS issue charges for the new financial year's FIPS user licences.

## **Section 4 - Break**

## **Section 5 - Sharing Good Practice**

### **Validation Responses**

- One Training Provider issues Welcome & Congratulations emails to learners explaining next steps and communications to expect. This has improved the validation response rate.
- Some Training Providers are using Whatsapp to confirm each milestone as this is free and secure and learners usually pay attention to it – this also gets a good response rate and making validation volumes much better now than at the start.
- Many learners delete emails thinking they're junk. Advice should be given to learners to be aware of the types of requests they will receive from SDS.

### **Helping employers to return all required paperwork**

- One TP shared their practise of sending out a list of all paperwork required to be completed and returned by employers. They do this when registering learners for MA starts and have a form they've created to help employers keep track. The Training Provider sends this paperwork out to the employer when registering the learner, before they've done their induction, and after their induction the employer sends it back to the Training Provider who then further populates the form. This has proved to be a big time-saver and is helpful to employers as well as Training Providers.

### **How does the group feel about including other programmes in future focus group sessions?**

SDS is considering whether separate support sessions are required for the different programmes on FIPS or if it would be better to include the other programmes in the existing focus group, which has previously always centred around the MA programme.

The group responded that it would be best to keep the other programmes separate for their first session or two, but after that there would be a benefit to new Training Providers on FIPS in getting advice from TPs who are already familiar with it.

### **Update on FIPS & Multivue**

SDS advises that these systems are both being updated at some point over the summer but are unable to give exact dates yet.

### **Questions:**

- Q: Training agreements still say 2017/18 on footer & 'FF' rather than 'FG' when printed off even when using the blank one on FIPS, is that an issue?  
A: This is now resolved.
  
- Q: Is it possible to print off alert that a learner is doing another programme?  
A: Best way is to screenshot the alert message.
  
- Q: Is it possible to print off learner history?  
A: Yes, up to 3 years' history available – if a Training Provider is not able to print this out then they can take a screen-print.
  
- Q: When the CTS migration happens will there be a validation run?  
A: There are no current plans to include validation for participants who will migrate from CTS.

## **Section 6 - Next steps for this group / AOB / Date of next meeting**

### **Dates for next meetings:**

Tues 12th June, 1pm-4pm (this meeting will focus on reporting)

Tues 28<sup>th</sup> August, 1-4pm

### **Summary of Actions:**

1. SDS to add Occupational Group to MA Stats reports
2. SDS to issue electronic version of draft Outstanding Milestone Report Guidance for provider feedback
3. SDS to issue list of available system views for TPs to review
4. TPs to review list of system views and feed back to SDS before next meeting
5. TPs need to review FIPS user licenses (once received from SDS)
6. SDS will send out minutes & agenda for next meeting