

Provider Guidance

1. Purpose

This guide is intended to be a resource for all Learning Providers involved in the delivery of Next Step, formerly Skills Accounts, from October 2010 onwards. It should be used in conjunction with the Next Step Reference Guide for Learning Providers, the Next Step Frequently Asked Questions and Communication Brief - Introduction to Next Step, all available on the Skills Funding Agency website.

This document supersedes the previous Skills Accounts Delivery Partners Guidance Manual (August 2010). Future guidance will be made available as further enhancements are made to the service.

2. Background

The arrival of Next Step brings together commitments set out in several key documents, primarily, World Class Skills: Implementing the Leitch review of Skills England (July 2007); Skills for Growth: A National Skills Strategy for Economic Growth and Individual Prosperity (Nov 2009), Shaping the Future – a new adult advancement and careers service for England (October 2008) and more recently, Fuelling Potential: A blueprint for Skills Account and the adult advancement and careers service (April 2010).

From August 2010, Next Step, the new adult careers service, became available through a national telephone and face-to-face service. The new Next Step website is also now operational and has replaced the previous Skills Accounts and Careers Advice websites. The functionality contained within Skills Accounts has now transferred to the new Next Step website.

In establishing a new integrated adult careers service, John Hayes MP, Minister of State for Further Education, Skills and Lifelong Learning, said:

“By integrating adult careers services, we are building a more responsive system that will provide all the information and tools people need in one place, making it easier and quicker for all users to get the right information and support for them”

3. What is Next Step?

Next Step, the adult careers service, will give everyone access to the best information and advice supported by resources to enable them to make more effective choices about skills, careers, work and life. Information, advice and resources are available online, as well as through advisers on the telephone and face-to-face.

Next Step is available to all adults in England, aged 19 and over, or 18 and over for Jobcentre Plus customers and offenders in custody, whatever their prior skills, qualifications or employment status.

4. Learning Providers' role as Delivery Partners

Individuals, via the Next Step website www.direct.gov.uk/nextstep, will have the ability to register with Next Step (formerly Skills Accounts) with the ability to store their personal information on skills development, achievements, careers and financial support for learning.

Below is a brief outline of the different delivery routes and the key partners involved:

- **For individuals who are already undertaking learning via Skills Funding Agency approved providers** - either Strategic Learning Providers (primarily ALR Providers), Employability Skills Programme Providers or Young Persons Guarantee Providers can register expressions of interest for Next Step
- **Mediated route** - an individual can visit a Next Step face-to-face adviser or via the telephone service where they will be supported as part of a careers, information or advice session to register with Next Step
- **Self-directed route** - an individual can access the Next Step website themselves to register online.

4.1. Strategic Learning Providers (ALR funded providers)

Feedback from the Skills Accounts trial has suggested that learners are well placed to be signposted to Next Step at any point in their learning journey. For example, at the point of an information and advice session during enrolment, at a course review time or when a learner is due to leave a course and is looking for their next engagement.

Role of the Strategic Learning Provider

Strategic Learning Providers will fulfil four main functions these are:

- 4.1.1 Provide information and promote the Next Step offer
- 4.1.2 Capture customer details for those that are interested in the offer and produce an ILR extract and submit via monthly batch return
- 4.1.3 Perform role as a Learner Registration Body
- 4.1.4 Update the Course Directory

4.1.1. Provide Information and promote Next Step

- Introduce and promote Next Step using the supporting materials explaining the features and benefits
- Explain that by registering for Next Step, learners are part of the Next Step service and that they may be contacted for their feedback
- Ensure the learner is aware of the Fair Processing Notice which should include Next Step and that they are happy to be registered with the service

- Inform the learner of the availability and functionality of the Next Step service
- The learner should have a clear understanding of what they can expect to receive and when. Once the batch file (see below) is received by the Skills Funding Agency a welcome letter will be produced and sent to the learner, asking them to register. (The welcome letter will be sent out 5 working days after the batch file has been received and approved by the Skills Funding Agency)
- Inform learner of support facilities and customer helpline as appropriate
- Respond to queries from learners regarding Next Step
- To log an issue/query/feedback, refer to your Skills Funding Agency contact

4.1.2. Learning Provider Batch Extract Process

For the purposes of Next Step registration, providers are asked to capture learner details using normal business enrolment processes ensuring that contact telephone numbers are collected and where possible email address for evaluation purposes. Providers will need to upload a standard FO file to the Provider Gateway (PG) Document Exchange on a monthly basis as follows:

- Create the ILR batch file: Learning Providers will be required to send an invalidated ILR Batch export file (FOx) to the Provider Gateway on the relevant date as agreed with your Skills Funding Agency contact. The batch file will need to include field L40a with code 16
- Please note this ILR return is for Next Step MI purposes only there are no funding implications associated with this return.
- Learners can also register themselves directly on the Next Step website however the ILR return is also required to validate the learner and to benefit from the full offer.
- Learners that agree to register with Next Step or have already registered (and need to be verified) are flagged on the ILR with code 16 in field L40a
- An ILR file is created from the provider's MI system and uploaded onto the Provider Gateway on a monthly basis
- The Next Step system will process the ILR file and notify the learner that they can now complete their registration by logging onto the website
- This file is not part of the annual FO return timetable as detailed in the ILR specification Appendix A. It is a stand alone output file from LIS that will not be validated against the usual ILR validation rules and will not be used for funding or performance monitoring. Consequently the majority of the fields in the ILR do not need to be fully completed or verified for this upload. The data from a small number of fields only will be used for the registration of Next Step for the learner (see the table listing below)
- Although most of the ILR fields are not required for Next Step purposes, providers are asked to upload the entire ILR file to avoid them having to create a separate file to a different specification
- The following process will need to be followed
 - 1) Log on to your Provider Gateway
 - 2) Go to the Document Exchange
 - 3) On the left hand menu click 'Document List'
 - 4) Click 'Skills Accounts' from the various document types displayed
 - 5) Click '**SA - ILR**'
 - 6) Now upload the required ILR batch file

The Next Step system will read the ILR file from Document Exchange and process the file. The general validation needed for Next Step (no postcode, DOB, first name and surname) and entitlement validation processes (below age, invalid UK postcode) are then performed. All new valid records will be inserted into the Skills Funding Agency Next Step database or if a record already exists, it will be updated. If records are invalid they will be returned to providers to make amendments.

Monthly Timeline Return

Each region has agreed with National Office a timetable for providers to send in the export file. The agreed timeline for the monthly batch returns are as follows:

- 1st Fri of the month – South East Region
- 2nd Fri of the month – East Midlands Region
- 3rd Fri of the month – South West, West Midlands and North East Regions
- 4th Fri of the month – Yorkshire & Humber, East of England, London and North West Regions

The ILR fields that must be completed for Next Step registration are as follows:

ILR Field Number	Field Name	Field Length	Field type
L01	Provider Number	6	Numeric
L03	Learner reference number	12	alphanumeric
L09	Learner surname/family name	20	alphabetic
L10	Learner forenames	40	alphabetic
L11	Date of birth	8	date
L13	Sex	1	alphabetic
L17	Home postcode	8	alphanumeric
L18	Address line 1	30	alphanumeric
L19	Address line 2	30	alphanumeric
L20	Address line 3	30	alphanumeric
L23	Telephone number	15	alphanumeric
L24	Country of domicile	2	alphabetic
L40a	National learner monitoring	2	numeric
L45	Unique learner number	10	numeric
L46	UK provider reference number	8	numeric

4.1.3. Role as a Learner Registration Body

- For the purposes of learner verification, and in order to match or create a ULN, providers **must** make sure they submit an ILR as above. (It is important to note that learners who are not identity verified will be unable to see their Verified Learning Record, Learner Statement, and Skills Action Plans, should they be available, through Next Step).



- At the point of registration, you may find that some learners are already registered with Next Step. **An ILR submission as above must still be made.** This will enable Next Step to determine that the learners' identity has been verified, and to provide those learners with access to their Verified Learning Record, Learner Statement and Skills Action Plans (should they be available)
- Current forms of accepted evidence of identity are; relationship with school, passport, driving licence, ID card or other form of national identification, National Insurance card, benefits documentation e.g. certificate of entitlement to funding, examination certificates, bank credit or debit card. The Next Step system links to the Learner Record Services for ULN matching.

4.1.4. Updates to the Next Step Course Directory

It is now a condition of funding that Learning Providers update their course information to the course directory on at least a quarterly basis. By ensuring that this information is both current and comprehensive, learners will be able to accurately search for relevant courses offered by all providers. Providers in the first instance should refer to www.coursedirectoryproviderportal.org.uk for further information or their Skills Funding Agency contact.

4.2. Employability Skills Programme (ESP) Providers

Employability Skills Programme (ESP) Providers will actively promote Next Step as part of their overall programme of support including careers, information and advice services. ESP providers will offer and register customers with Next Step, respond to customer enquiries and signpost where relevant to other providers.

Role of the ESP Adviser

ESP advisers will play an important part in supporting customers in Next Step and will specifically fulfil four key functions:

- 4.2.1 Provide Information and promote Next Step
- 4.2.2 Register customers with Next Step
- 4.2.3 Provide customers with help and support with the Next Step website functionality
- 4.2.4 Respond to customer enquiries, provide feedback and MI

4.2.1. Provide Information and promote Next Step

- Introduce and provide information on Next Step, explaining the features and benefits using the supplied supporting materials
- As part of induction sessions, the ESP adviser outlines with the learner how Next Step can be used to support their learning journey
- Explain that by registering for Next Step, learners are part of the Next Step service and that they may be contacted for their feedback.
- Ensure the learner is aware of the Fair Processing Notice which should include Next Step

- Inform the learner of the availability of the Next Step website and support facilities as appropriate

4.2.2. Register customers with Next Step

Where possible the customer should be encouraged and supported to register with Next Step at the time of the induction session (or later in the programme if appropriate).

- If the customer is IT literate; they can then register directly on the Next Step website
- If the customer is not IT literate; the adviser will need to offer assistance to the learner to log on and register with Next Step
- If the customer has literacy and/or language problems; assistance will need to be given to register with Next Step
- In circumstances where there is no live access to the internet, the customer can refer to Next Step on 0800 100 900 to register their interest
- Customers will receive a welcome letter or email (depending on the chosen communication route) once registration is complete
- For MI purposes; please ensure the learner selects the relative provider type (e.g. ESP) on the source of awareness option when registering with Next Step.

4.2.3. Provide help and support for use of Next Step functionality

Once registered with Next Step, the ESP adviser should outline the services available to the individual as part of the Next Step website.

4.2.4. Respond to Customer Enquiries, provide feedback and MI

- ESP advisers will also need to respond to customer enquiries as and when required and in particular provide information on the Next Step website and the customer helpline numbers
- To log an issue/query/feedback, refer to your Skills Funding Agency contact
- Provide the Skills Funding Agency with the number of completed registrations.

4.3. Young Persons Guarantee (YPG) Providers

As part of the Young Persons Guarantee, advisers will actively promote Next Step as part of their overall programme of support including careers, information and advice services. Young Persons Guarantee advisers will offer and register customers with Next Step, respond to customer enquiries and signpost where relevant to other learning providers.

Role of the Young Persons Guarantee Provider

YPG providers will play an important part in supporting customers within their Next Step journey and will specifically fulfil five key functions:

Provide Information and promote Next Step
Register customers with Next Step
Capture customer details within the ILR return
Provide help and support for use of the Next Step website functionality
Responding to customer enquiries, provide feedback and MI

4.3.1. Provide Information and promote Next Step

See Employability Skills Programme Providers

4.3.2. Register the customer with Next Step

See Employability Skills Programme Providers

4.3.3. Capture Customer details via the monthly ILR return

- Learners can open register directly by visiting the Next Step website however, the ILR return is also required.
- Via the monthly ILR providers will need to include field L40a with code 16
- Please note this ILR return is for Next Step MI purposes only there are no funding implications associated with this return.

4.3.4. Provide help and support for use of Next Step functionality

Once registered with Next Step, the YPG provider should outline the services available to the individual as part of the Next Step website.

4.3.5. Respond to Customer Enquiries, provide feedback and MI

See Section relating to Employability Skills Programme Providers.

5. Supporting the Service

5.1. Operational Support

The Skills Funding Agency Next Step Operations team, monitors, evaluates and tracks issues, queries and problems. This provides the opportunity to feedback progress and input into the service moving forward.

All feedback, queries and issues should be fed into the Operations Team via your regional Skills Funding Agency contact.

Individuals can get support (including technical related) and provide feedback by either calling Next Step on 0800 100 900 or using the Call Back/ Email an Adviser/ Feedback functions on the Next Step website.

5.2. Marketing and Communications

Details of the Next Step marketing and communications materials available for use by delivery partners when communicating with learners and for awareness raising with staff, can be found on the Skills Funding Agency website:

<http://skillsfundingagency.bis.gov.uk/providers/logoanddesignguidance/nextstep/>

As part of the new government's commitment to reducing public expenditure, marketing across the public sector has been restricted. As a result, printed copies of the Next Step leaflets, posters and stationery are no longer available to order. The Skills Funding Agency apologises for the inconvenience this has caused.

The Skills Funding Agency website contains templates and downloads for:

Communication Toolkit

- Quick Guide
- Key messages and lines to take
- Frequently Asked Questions

Logos and Guidelines

- Print and web logos
- Brand Guidelines

Marketing and Materials

- Generic leaflet
- Posters
- Banner stand

Templates and Stationery

- Word
- Letters
- Powerpoint
- Business card

Press/Media Coverage

All public statements regarding Next Step require approval from the Skills Funding Agency prior to being published. Please refer to the Press Protocol document for further information; this can be obtained from your Regional or National Skills Funding Agency contact.

Data Protection

As a data controller registered with the UK Information Commissioner, the Skills Funding Agency can assure individuals that the personal details provided will only be used by Next Step.

The Next Step system meets existing data protection requirements.

When individuals register with Next Step they will receive detailed information about how their details will be stored and used.

5.3 Contacts and Further Information

For further information please refer to your Skills Funding Agency contact.

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