Funding Calculation Rulebase for the 2014 to 2015 funding year

Version

This document is dated 13 January 2015. It corresponds to the logic in the current version of the Funding Information System (FIS) and online systems.

The version number defined within the rulebase is shown in section 13 of this document, on page 53.

This document sets out the main funding calculation for the 2014 to 2015 funding year.

January 2015

Of interest to technical staff in further education and skills training providers

1. Table of Contents

2. Introduction

This document is an annotated version of the main funding calculation for the Skills Funding Agency in the 2014 to 2015 funding year.

The funding calculation is implemented as a "rulebase" using a rules management product called Oracle Policy Automation (OPA), which uses a natural language approach to turn statements into computer logic.

This document itself is compiled into the product to produce the calculations; there is no separate set of programming code to implement the logic.

The next section briefly explains about the rulebase and how it is constructed and viewed. The formatting in the rulebase is important as some types of formatting represent a certain function or logic. This is explained fully in the next section.

3. Introduction to rulebases

3.1. What is a rule?

A **rule** is an assertion that a conclusion can be drawn from a particular state of affairs. For example:

> If you leave the ice cream in the sun, then the ice cream will melt.
>
> Full-time students and pensioners are eligible for a discount at the university bookshop.
>
> Your plane can take-off from the airport if it has permission from the control tower and has completed a safety check.

Rules operate on data and can incorporate operations such as comparisons and mathematical functions.

3.2. What is a rulebase?

A **rulebase** is simply a collection of one or more connected rules. For example:

Rule 1:

> the person is eligible for a discount at the university bookshop if
>
> the person is a full-time student or
>
> the person is a pensioner

Rule 2:

> the person is a full-time student if
>
> the person is studying a full-time course and
>
> the person does not have a full-time job

3.3. Conclusions and conditions

Each rule must have a **conclusion** (the state of affairs that can be determined) and usually has at least one **condition** (the conditions upon which that determination may be made). A conclusion is the "Then" part of an "If… Then…" statement. A condition is the "If" part of an "If…. Then…" statement.

> CONCLUSION: the ice-cream will melt if
>
> CONDITION: the ice-cream has been left in the sun
>
> CONCLUSION: the person is eligible for a discount at the university bookshop if
>
> CONDITION: the person is a full-time student
>
> CONDITION: the person is a pensioner
>
> CONCLUSION: your plane can take-off from the airport if
>
> CONDITION: it has permission from the control tower
>
> CONDITION: it has completed a safety check

3.4. What is an attribute?

An attribute is a single unit of data or fact. For example:

- the person is a full-time student

- the ice-cream has been left in the sun

An attribute is of a particular data type: boolean, or variable (text, number, currency, date, time of day, or date and time). Boolean attributes can either have a true or false value, and variable attributes take a text, number, currency, date, time of day, or date and time value depending on the type of variable.

The following are some examples of attributes and types:

- the person is hungry (boolean attribute)

- the person's name (variable attribute – text)

- the person's date of birth (variable attribute – date)

- the number of cookies the person wants to eat (variable attribute – number)

- the cost of the person's meal (variable attribute – currency)

Attributes form the building blocks of rules.

3.5. Connecting conditions using and/or

Where a rule contains multiple conditions, the conditions must be separated by an **and** or an **or** to indicate whether one or all conditions are required to satisfy the conclusion.

For instance,

Example 1	Example 2
the person is eligible for a pension if:	the person is eligible for a pension if:
the person is over 65.	the person is over 65.
AND	OR
the person is a citizen.	the person is unable to work.

In Example 1, both conditions must be true to be able to draw a positive outcome for the person's eligibility. If either condition is false, then only a negative outcome can be drawn.

In Example 2, either the first or second condition, or both, must be true to be able to draw a positive outcome. If both the conditions are proved false, then a negative outcome is drawn.

3.6. Grouping conditions using both/all and either/any

The **all** operator is used to group conditions separated by **and**. In the example "A if B or (C and D)" the brackets are around the conditions joined by an **and** so you must use the **all** operator in your rule:

The **any** operator is used to group conditions separated by **or**. In the example "A if (B or C) and D" the brackets are around the conditions joined by an **or** so you must use the **any** operator in your rule:

conclusion	**A is true if**
level 1	any
level 2	B is true
level 2	or
level 2	C is true
level 1	and
level 1	D is true

NOTE: You may also use the word **both** in place of **all** and **either** in place of **any**. Using these words has the same effect but may make the text more readable where only two conditions are grouped.

The grouping operators sit above the conditions they are grouping. The conditions being grouped sit beneath the grouping operator and should therefore take the style of the next level down. For example, if the word "any" is in **Level 1** style, the conditions it is grouping should be in **Level 2** style.

The following example demonstrates this placement:

conclusion	**the claimant is eligible for a pension if**
level 1	the claimant is poor
level 1	or
level 1	all
level 2	the claimant is sick and
level 2	the claimant has been sick for more than 6 months and
level 2	the claimant does not have another form of income

Where your rule continues (as in the example below) at the higher level, the appropriate operator (**and** or **or**) should be added as a separate line at the same level as the subsequent condition. For example:

conclusion	**the claimant is eligible for a pension if**
level 1	the claimant is poor or
level 1	all
level 2	the claimant is sick and
level 2	the claimant has been sick for more than 6 months and
level 2	the claimant does not have another form of income
level 1	or
level 1	the claimant has been entitled to a pension previously

3.7. Alternative conclusions

By default, Oracle Policy Modelling assumes all rules contain an **alternative conclusion**. That is, if the conditions are not satisfied, you can infer the opposite of the conclusion. For example, given the rule:

CONCLUSION: it is a good idea to take an umbrella if

CONDITION: it is raining outside

If it is not raining outside, you may conclude that it is not a good idea to take an umbrella.

The alternative conclusion need not be stated, it is assumed in all rules unless otherwise indicated.

3.8.   Understand Oracle Policy Modelling format and structure

Oracle Policy Modelling format is quite strict in order to maintain consistency and completeness of rules and to avoid logical ambiguity. In particular, styles and indentation play an important role in recognizing the meaning of rules. Indentation and styles are used to separate the conditions from the conclusion, and conditions of different levels from each other. Distinct conditions are separated onto different lines, and the placement of **and** and **or** between conditions has special significance.

Rules are marked up in Word using Oracle Policy Modelling styles. Each style has a unique style name and colouring to make it easy to identify.

The rule below shows an example of how a rule would be formatted in Word using Oracle Policy Modelling document styles:

conclusion	**the claimant is eligible for living allowances if**
level 1	the claimant is living alone and
level 1	the claimant satisfies the age criteria
level 2	the claimant satisfies the male age criteria
level 3	the claimant is aged over 65 and
level 3	the claimant is a man
level 2	or
level 2	the claimant satisfies the female age criteria
level 3	the claimant is aged over 63 and
level 3	the claimant is a woman

3.9.   Rule tables in Word documents

In many cases it is more efficient to use rule tables for expressing logic, especially where there is an implied order of logic and/or you need to make sure a conclusion is always reached.

The following diagram shows how a rule table is structured:

attribute to be set (conclusion)	
value if	premise
value if	premise
...	...
value	otherwise

The first row of the table defines which variable or statement will be used as the conclusion attribute for the rule.

The left hand column is used to specify values (includes mathematical expressions) which will set the value of the conclusion attribute if the condition in the right hand column of the same row equates to true.

The final row provides an alternative conclusion, to which the conclusion will be set if all of the conditions equate to false.

In other words:

B	
C	A
E	D
F	otherwise

would mean 'If A is true then B is set to C, otherwise if D is true then B is set to E, otherwise B is set to F'.

Rule tables operate from top to bottom, with an implicit 'otherwise' between each row. So the conclusion is set based on the first condition that is proved to be true and the rule exited at that point (without assessing any of the conditions in the rows below). Therefore the order of the rows in rule tables is important.

3.10. Uncertain vs Unknown

We use 'uncertain' as well as 'unknown' in rule bases and it is important to understand the difference between the two.

An attribute is unknown if it has simply not been provided (or in the context of an interview, the question has not yet been asked).

An attribute is uncertain if some or all of the information necessary to prove a conclusion has been provided but the conclusion can still not be determined to be either true or false.

The following truth tables show how uncertainty works with **and** and **or** statements:

P	Q	P AND Q
TRUE	UNCERTAIN	UNCERTAIN
UNCERTAIN	TRUE	UNCERTAIN
FALSE	UNCERTAIN	FALSE
UNCERTAIN	FALSE	FALSE
UNCERTAIN	UNCERTAIN	UNCERTAIN

P	Q	P OR Q
TRUE	UNCERTAIN	TRUE
UNCERTAIN	TRUE	TRUE
FALSE	UNCERTAIN	UNCERTAIN
UNCERTAIN	FALSE	UNCERTAIN
UNCERTAIN	UNCERTAIN	UNCERTAIN

3.11. Determining whether an attribute's value is certain or known

The known and certain operators are used on rule conditions and cause the condition to evaluate a predictable way when the underlying attribute in the condition has a particular value:

The **uncertain** operator causes the condition to return true only if its value is uncertain. A condition using the uncertain operator returns false if the underlying value is not uncertain.

The **known** operator is commonly used in procedural rules that drive an investigation. For example, forcing attributes to be known in a particular order before determining a goal.

The **currently known** operator is used to test whether an attribute is known, without causing it to be brought up in the question search and asked of the user, ie it will test the *current* state of the attribute. It is used a lot where the rule base runs off data (rather than an interactive interview) where the data may or may not be provided, and the fact that a piece of data has not been provided has meaning (e.g. if the 'eligibility for entitlement funding' is simply not returned in the ILR then we can infer that the learner is not eligible for entitlement).

The **unknown** operator is most commonly used for defaulting values in the rulebase where the user has the option of providing an overriding value (either directly or through an inferred attribute).

For example:

Operator	Example
certain	the claimant is eligible for the benefit if it is certain whether or not the claimant is entitled to a payment or the claimant's eligibility status is certain
uncertain	the outcome is unclear if it is uncertain whether or not the means have been achieved or the status of the investigation is uncertain
known	the interview has been completed if it is known whether or not the claimant is eligible for a payment or the claimant's rate of benefit is known
unknown	the generic heading should be shown if it is unknown whether or not the person is eligible or the person's rate of entitlement in unknown
currently known	income details are available if the applicant's income is currently known

3.12.   How are comments shown?

Some explanatory comments are added within the rules. These are not part of the rules but may give background information or context. They are shown in the following format:

Comments are shown in this format.

They are usually shown above the rule or set of rules which the comment relates to.

4. Parameters

This section contains some parameters used by the calculation. They are grouped together in this section rather than 'hard-coding' values such as the current funding year start date, to make for easier maintenance of the rulebase in future.

the current funding year = "2014/2015"

the current funding year start date = 2014-08-01

the current funding year end date = 2015-07-31

the default job outcome percentage = 10%

the default total achievement percentage = 20%

the national non-government percentage = 50%

The 2012/13 value is used for Functional Skills within apprenticeships, which have an adjustment applied to give them the same effective rate as in 2012/13 for existing Frameworks.

the 2012/2013 Functional Skills fee proportion = 17.5%

the default area uplift = 1

the default disadvantage uplift = 1

the OLASS disadvantage uplift = 1.12

The large employer factor does not apply to Classroom learning, Traineeships, OLASS provision, or 16-18 Apprenticeships.

the default large employer factor = 1

the large employer factor for 19-24 Traineeships = 1

the large employer factor for 16-18 Apprenticeships = 1

the large employer factor for 19-23 Apprenticeships = 0.75

the large employer factor for 24+ Apprenticeships = 0.75

the large employer factor for Adult OLASS = 1

the large employer factor for Classroom learning = 1

the large employer factor for Workplace learning = 0.75

The next three factors are applied to the funding rates for apprenticeships in different age categories, and are based on the ratios between the 2012/13 National Rates.

the default Apprenticeship age factor = 1

This is the ratio of the 2012/13 National Rates between 16-18 Apprenticeships and 19-24 Apprenticeships.

the 16-18 Apprenticeship age factor = 1.0723

This is the ratio of the 2012/13 National Rates between 25+ Apprenticeships and 19-24 Apprenticeships.

the 24+ Apprenticeship age factor = 0.8

The cap is calculated from a learner's monthly instalments, excluding achievement. So to correspond to this, the main figure of £4,400 which represents the whole aim funding, has the default achievement percentage subtracted.

the yearly cap amount excluding achievement = £4,400 * (1 - the default total achievement percentage)

5. Categorisations

This section includes categorisations. In many cases they are simple translations of ILR values into attributes to be used in other rules.

5.1.   Apprenticeship Programmes

This section has a series of attributes derived from ILR values.

the learning delivery is an Apprenticeship if

the learning delivery's programme type is currently known and

any

the learning delivery's programme type = 2 or
the learning delivery's programme type = 3 or
the learning delivery's programme type = 10 or
the learning delivery's programme type = 20 or
the learning delivery's programme type = 21 or
the learning delivery's programme type = 22 or
the learning delivery's programme type = 23

the learning delivery is an Apprenticeship programme aim if

the learning delivery is an Apprenticeship and
the learning delivery's aim type = 1

the learning delivery is an Apprenticeship component aim if

the learning delivery is an Apprenticeship and
the learning delivery's aim type = 3

the learning delivery is a Traineeship if

the learning delivery's programme type is currently known and
the learning delivery's programme type = 24

the learning delivery is a Traineeship programme aim if

the learning delivery is a Traineeship and
the learning delivery's aim type = 1

the learning delivery is a Traineeship component aim if

the learning delivery is a Traineeship and
the learning delivery's aim type = 3

Apprenticeship Knowledge and Competency component aims have their achievement payments held back until the programme aim achieves.

the learning delivery is an Apprenticeship Knowledge aim if

the learning delivery is an Apprenticeship component aim and
the learning delivery's framework component type is currently known and
the learning delivery's framework component type = 2

Code 003 represents aims which are both Competency and Knowledge; categorised as Competency for this purpose.

the learning delivery is an Apprenticeship Competency aim if

the learning delivery is an Apprenticeship component aim and

the learning delivery's framework component type is currently known and

any

the learning delivery's framework component type = 1 or

the learning delivery's framework component type = 3

the learning delivery is an Apprenticeship Knowledge or Competency aim if

the learning delivery is an Apprenticeship Knowledge aim or

the learning delivery is an Apprenticeship Competency aim

The assumption is that codes "004" and "005" will be used for Employer Rights and Responsibilities (ERR) and Personal Learning and Thinking Skills (PLTS), which are not funded within apprenticeships, but could have non-zero matrix rates set for them outside apprenticeships.

This logic was added to ensure they get zero funding within apprenticeships, as the original intention was to use matrix rates for some apprenticeship aims. As matrix rates are not now being used in apprenticeships, this step is now less essential but has been left in because it is still true that these types of aims should not be funded.

the learning delivery is a non-funded Apprenticeship aim if

the learning delivery is an Apprenticeship component aim and

the learning delivery's framework component type is currently known and

any

the learning delivery's framework component type = 4 or

the learning delivery's framework component type = 5

the learning delivery is an Apprenticeship Functional Skills aim if

the learning delivery is an Apprenticeship and

the learning delivery's framework common component is currently known and

any

the learning delivery's framework common component = 10 or

the learning delivery's framework common component = 11 or

the learning delivery's framework common component = 12

5.2. Funding and Monitoring Codes

the learning delivery is Workplace learning if

the learning delivery's WPL FAM code is currently known and

the learning delivery's WPL FAM code = 1

Any aim which is not Workplace learning and not an apprenticeship is automatically classed as Classroom learning.

the learning delivery is Classroom learning if

the learning delivery is not Workplace learning and

the learning delivery is not an Apprenticeship

the learning delivery is OLASS in custody if

all	
	the learning delivery's LDM 1 FAM code is currently known and the learning delivery's LDM 1 FAM code = 34

or	
all	
	the learning delivery's LDM 2 FAM code is currently known and the learning delivery's LDM 2 FAM code = 34

or	
all	
	the learning delivery's LDM 3 FAM code is currently known and the learning delivery's LDM 3 FAM code = 34

or	
all	
	the learning delivery's LDM 4 FAM code is currently known and the learning delivery's LDM 4 FAM code = 34

Residential aims get a long term residential college (LTRC) uplift if the provider is also an LTRC provider.

the learning delivery is residential if

all	
	the learning delivery's LDM 1 FAM code is currently known and the learning delivery's LDM 1 FAM code = 322

or	
all	
	the learning delivery's LDM 2 FAM code is currently known and the learning delivery's LDM 2 FAM code = 322

or	
all	
	the learning delivery's LDM 3 FAM code is currently known and the learning delivery's LDM 3 FAM code = 322

or	
all	
	the learning delivery's LDM 4 FAM code is currently known and the learning delivery's LDM 4 FAM code = 322

Achievement does not have funding adjustment for prior learning applied if the learning delivery is a restart.

the learning delivery is a restart if

the learning delivery's RES FAM code is currently known and the learning delivery's RES FAM code = 1

Eligibility for Enhanced Apprenticeship Funding.

the learning delivery is EEF 2 if

the learning delivery's EEF FAM code is currently known and the learning delivery's EEF FAM code = 2

the learning delivery is EEF 3 if

the learning delivery's EEF FAM code is currently known and the learning delivery's EEF FAM code = 3

Determine whether the aim is fully funded or co-funded.

the learning delivery is fully funded if

the learning delivery's FFI FAM code is currently known and the learning delivery's FFI FAM code = 1

The large employer factor is not applied to ATA or GTA apprenticeship aims.

the learning delivery is an ATA or GTA Apprenticeship aim if

the learning delivery is an Apprenticeship and

any

all

the learning delivery's LDM 1 FAM code is currently known and

any

the learning delivery's LDM 1 FAM code = 129 or
the learning delivery's LDM 1 FAM code = 130

or
all

the learning delivery's LDM 2 FAM code is currently known and

any

the learning delivery's LDM 2 FAM code = 129 or
the learning delivery's LDM 2 FAM code = 130

or
all

the learning delivery's LDM 3 FAM code is currently known and

any

the learning delivery's LDM 3 FAM code = 129 or
the learning delivery's LDM 3 FAM code = 130

or
all

the learning delivery's LDM 4 FAM code is currently known and

any

the learning delivery's LDM 4 FAM code = 129 or
the learning delivery's LDM 4 FAM code = 130

5.3. Area and Disadvantage Uplifts

The area cost factor and disadvantage uplift default to 1 if they are unknown.

the learning delivery's adjusted area cost factor	
the learning delivery's area cost factor	the learning delivery's area cost factor is currently known
the default area uplift	otherwise

the learning delivery's adjusted disadvantage uplift	
the OLASS disadvantage uplift	the learning delivery is OLASS in custody
the learner's disadvantage uplift	the learner's disadvantage uplift is currently known
the default disadvantage uplift	otherwise

5.4. Funding Line Type

The funding line type is used to aggregate the funding into various different categories based on the learner's age, whether they are an Offender in Custody, Traineeship, Classroom Learning, Workplace Learning etc.

Note that if the learner was aged 24 when they started an apprenticeship, and they started before 1 August 2013, the learner is classed as a 19-23 Apprenticeship. This is to maintain the principle of paying using the rate at start; otherwise the rates would be scaled by 80% with the change in categorisation from '19-24' (in 2012/13) to '19-23'.

the learning delivery's funding line type	
"19-24 Traineeship"	the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is a Traineeship
"Classroom Learning"	the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is Classroom learning
"Workplace Learning"	the learner's age at 31st August of the current funding year >= 19 and the learning delivery is not OLASS in custody and the learning delivery is not an Apprenticeship and the learning delivery is Workplace learning
"Adult OLASS - Learning and Skills"	the learning delivery is OLASS in custody and any the learning delivery's upper case unit type is unknown or the learning delivery's upper case unit type <> "CL"
"Adult OLASS - PSD"	the learning delivery is OLASS in custody
"16-18 Apprenticeship"	the learning delivery's age at start < 19 and the learning delivery is an Apprenticeship
"16-18 Apprenticeship"	the learning delivery's age at start >= 19 and the learning delivery is EEF 2 and the learning delivery is an Apprenticeship
"19-23 Apprenticeship"	the learning delivery's age at start >= 19 and the learning delivery's age at start < 24 and the learning delivery is not EEF 2 and the learning delivery is an Apprenticeship
"19-23 Apprenticeship"	the learning delivery's age at start = 24 and the learning delivery is an Apprenticeship and the learning delivery's adjusted Apprenticeship programme start date is earlier than the funding method transition date
"19-23 Apprenticeship"	the learning delivery's age at start >= 24 and the learning delivery is EEF 3 and the learning delivery is an Apprenticeship
"24+ Apprenticeship"	the learning delivery's age at start >= 24 and the learning delivery is not EEF 3 and the learning delivery is an Apprenticeship
"None"	otherwise

5.5. Entity Counts

The Learner FAM entity count has to be done in two stages because if there are no Learner FAM records, OPA returns an unknown rather than a zero.

the learning delivery's number of FAM records stage 1 = the number of the learning delivery's FAMs

the learning delivery's number of FAM records	
the learning delivery's number of FAM records stage 1	the learning delivery's number of FAM records stage 1 is currently known
0	otherwise

the learning delivery's number of Apprenticeship pathway programme aim records = the number of the learning delivery's Apprenticeship pathway programme aims

5.6. Upper Case Conversions

The ILR data is case insensitive, but OPA is case sensitive, so the FAM type is upper-cased here so that, for example, "LsF" can be used in the rulebase without worrying about the case of the original ILR data.

the learning delivery's upper case unit type = ToUpper(the learning delivery's unit type)

the learning delivery FAM's upper case type = ToUpper(the learning delivery FAM's type)

6. Date Rules

This section contains some derived date attributes and attribute which define the start and end of various periods or years.

6.1.   Aim Start and End Dates

Use the original start date if it is known, otherwise use the start date.

the learning delivery's adjusted start date	
the learning delivery's original learning start date	the learning delivery's original learning start date is currently known
the learning delivery's learning start date	otherwise

If an aim starts and finishes in the same period, it always generates funding in that period (assuming other funding eligibility criteria are met).

the learning delivery's planned end date and start date are in the same period if

ExtractMonth(the learning delivery's learning planned end date) = ExtractMonth(the learning delivery's learning start date) and

ExtractYear(the learning delivery's learning planned end date) = ExtractYear(the learning delivery's learning start date)

the learning delivery's actual end date and start date are in the same period if

ExtractMonth(the learning delivery's learning actual end date) = ExtractMonth(the learning delivery's learning start date) and

ExtractYear(the learning delivery's learning actual end date) = ExtractYear(the learning delivery's learning start date)

If the start date is 10 August 2014, this attribute would be set to 1 August 2014. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery's start date period = MakeDate(ExtractYear(the learning delivery's learning start date), ExtractMonth(the learning delivery's learning start date), 1)

If the actual end date is 10 August 2014, this attribute would be set to 1 August 2014. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery's actual end date period = MakeDate(ExtractYear(the learning delivery's learning actual end date), ExtractMonth(the learning delivery's learning actual end date), 1)

The next rules are used to determine the last period where funding is to be generated. For funding to be generated in a period, the planned or actual end date has to reach the end of that period. For example:

Planned end date = 10 August 2014. Below attribute = 1 August 2014.

Planned end date = 30 August 2014. Below attribute = 1 August 2014.

Planned end date = 31 August 2014. Below attribute = 1 September 2014.

the beginning of the period the day after the learning delivery's planned end date = MakeDate(ExtractYear(the date 1 days after the learning delivery's learning planned end date), ExtractMonth(the date 1 days after the learning delivery's learning planned end date), 1)

the beginning of the period the day after the learning delivery's actual end date = MakeDate(ExtractYear(the date 1 days after the learning delivery's learning actual end date), ExtractMonth(the date 1 days after the learning delivery's learning actual end date), 1)

This is a time-based attribute which is set to True for every day in the period of the aim's actual end date. This is used when assigning the balancing and job outcome payments.

the date is in the learning delivery's actual end date period	
true	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the beginning of the learning delivery's actual end date period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's actual end date period) and the date is in the current funding year
false	otherwise

This is the start date of the earliest apprenticeship programme aim with the same framework code and pathway code as the apprenticeship component aim.

the learning delivery's Apprenticeship programme start date	
the earliest of all the learning delivery's learning start date for the learning delivery's Apprenticeship programme aims	the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim
uncertain	otherwise

This is similar to the above except that it uses the original start date if it is known.

the learning delivery's adjusted Apprenticeship programme start date	
the earliest of all the learning delivery's adjusted start date for the learning delivery's Apprenticeship programme aims	the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim
uncertain	otherwise

6.2. Funding and Monitoring From and To Dates

If the Learning Delivery FAM's 'from' date is 10 August 2014, this attribute would be set to 1 August 2014. This is used when setting the time-based cash outputs as they have to span a whole period.

the beginning of the learning delivery FAM's from date period = MakeDate(ExtractYear(the learning delivery FAM's date applies from), ExtractMonth(the learning delivery FAM's date applies from), 1)

This is a way of determining the last period in which Learning Support Funding is to be generated, because for funding to be generated in a period, the Learning Delivery FAM's 'to' date has to reach the end of that period.

the beginning of the period the day after the learning delivery FAM's to date = MakeDate(ExtractYear(the date 1 days after the learning delivery FAM's date applies to), ExtractMonth(the date 1 days after the learning delivery FAM's date applies to), 1)

6.3. Planned, Actual and Threshold Days

This is the number of days between the start date and the planned end date.

the learning delivery's planned number of days in learning = 1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning planned end date)

This is the number of days between the start date and the actual end date.

the learning delivery's actual number of days in learning	
1 + DayDifference(the learning delivery's learning start date, the learning delivery's learning actual end date)	the learning delivery's learning actual end date is currently known
0	otherwise

This is the number of days which the aim has to be in learning for in order to be considered for funding (unless the aim is achieved).

the learning delivery's threshold days	
1	the learning delivery's planned number of days in learning >= 0 and the learning delivery's planned number of days in learning < 14
14	the learning delivery's planned number of days in learning >= 14 and the learning delivery's planned number of days in learning < 168
42	the learning delivery's planned number of days in learning >= 168
uncertain	otherwise

6.4. Age

This is the learner's age at the start of the aim. If the aim is an apprenticeship component aim, it calculates the age at the start of the related apprenticeship programme aim.

Note that this indirectly uses the Original Start Date ILR field if completed.

the learning delivery's age at start	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the learning delivery's adjusted Apprenticeship programme start date	any the learning delivery is an Apprenticeship programme aim or the learning delivery is an Apprenticeship component aim and the learner's date of birth is on or earlier than the learning delivery's adjusted Apprenticeship programme start date
the number of years between the learner's date of birth and the learning delivery's adjusted start date	the learning delivery is not an Apprenticeship programme aim and the learning delivery is not an Apprenticeship component aim and the learner's date of birth is on or earlier than the learning delivery's adjusted start date
0	otherwise

This is the learner's age at the 31 August of the current funding year.

the learner's age at 31st August of the current funding year	
uncertain	the learner's date of birth is unknown
the number of years between the learner's date of birth and the 31st August of the current funding year	the learner's date of birth is on or earlier than the 31st August of the current funding year
0	otherwise

the 31st August of the current funding year = MakeDate(ExtractYear(the current funding year start date), 8, 31)

6.5. Global Date Rules

This is a time-based attribute which is set to True on the last day of every period. This is used when totalling up uncapped funding.

the date is the last day of the period if

> TemporalOncePerMonth(the current funding year start date, the date 1 days after the current funding year end date, 31)

This is a time-based attribute which is set to True on every day in the current funding year. This is used when setting the time-based cash outputs to ensure that funding is only generated in the current funding year.

the date is in the current funding year	
true	TemporalOnOrAfter(the current funding year start date) and TemporalOnOrBefore(the current funding year end date)
false	**otherwise**

7. Funding Rate

This section derives the funding rate for each aim, using values from the Learning Aim Reference Service (LARS).

7.1. Determine date used to select the Rate

This date field is used to pick the rate and programme weighting from LARS. The rate used will be the rate as at this date in LARS.

Aims which start before the funding method transition date (1 August 2013) use the LARS rate which is effective on 31 July 2013. Other aims use the LARS rate which is effective on the aim's start date, or the aim's original start date if it is known.

the learning delivery's applicable rate date	
the date 1 days before the funding method transition date	the learning delivery's adjusted start date is earlier than the funding method transition date
the learning delivery's adjusted start date	otherwise

7.2. Unweighted Rates

Aims which start or on after the funding method transition date (1 August 2013) use the LARS Matrix (ASB) rate.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other, Adult Learner Responsive, or OLASS.

The unweighted rate is used for calculating the funding cap (not applied to apprenticeships) and for calculating the Government contribution for non-apprenticeship aims. Because neither of these is relevant to apprenticeships, a zero rate is used.

Traineeship programme aims do not earn funding, so a zero rate is used for those too.

the learning delivery's applicable unweighted rate stage 1	
0	the learning delivery is an Apprenticeship or
	the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix unweighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR unweighted rate)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other unweighted rate)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the learning delivery's OLASS unweighted rate)	the learning delivery is OLASS in custody
0	otherwise

This converts an unknown or uncertain rate in LARS into a zero.

the learning delivery's applicable unweighted rate	
the learning delivery's applicable unweighted rate stage 1	the learning delivery's applicable unweighted rate stage 1 is currently known and
	the learning delivery's applicable unweighted rate stage 1 is certain
0	otherwise

7.3. Weighted Rates

Similar logic to the previous section; this time with the Weighted rates.

Aims which start or on after the funding method transition date (1 August 2013), which are not in apprenticeships, use the LARS Matrix (ASB) rate.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other, Adult Learner Responsive, or OLASS.

For apprenticeship and Traineeship programme aims, it uses a zero rate, because programme aims do not earn funding.

For apprenticeship component aims, it uses the LARS Matrix (ASB) rate.

the learning delivery's applicable weighted rate stage 1	
0	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER App weighted rate)	the learning delivery is an Apprenticeship component aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix weighted rate)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR weighted rate)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other weighted rate)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the learning delivery's OLASS weighted rate)	the learning delivery is OLASS in custody
0	otherwise

This converts an unknown or uncertain rate in LARS into a zero.

the learning delivery's applicable weighted rate	
the learning delivery's applicable weighted rate stage 1	the learning delivery's applicable weighted rate stage 1 is currently known and the learning delivery's applicable weighted rate stage 1 is certain
0	otherwise

7.4. Applicable Programme Weighting

Again, a similar set of logic to the previous two sections, this time to determine the programme weighting code.

This code is only used for providers with a Specialist Resources flag, which have a different funding rate applied for aims with programme weighting G.

Aims which start or on after the funding method transition date (1 August 2013), which are not in apprenticeships, use the LARS Matrix (ASB) programme weighting code.

Other aims use the LARS rate based on their old funding model, Employer Responsive Other or Adult Learner Responsive, or the OLASS LARS programme weighting code.

For apprenticeship and Traineeship programme aims, it uses the default "A" programme weighting code, because the programme aims do not earn funding.

For apprenticeship component aims, it uses the LARS Matrix (ASB) programme weighting.

the learning delivery's applicable programme weighting factor stage 1	
"A"	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER App programme weighting factor)	the learning delivery is an Apprenticeship component aim
ValueAt(the learning delivery's applicable rate date, the learning delivery's Matrix programme weighting factor)	the learning delivery's adjusted start date is on or later than the funding method transition date
ValueAt(the learning delivery's applicable rate date, the learning delivery's Adult LR programme weighting factor)	the learning delivery was Adult Learner Responsive
ValueAt(the learning delivery's applicable rate date, the learning delivery's ER Other programme weighting factor)	the learning delivery was Employer Responsive Other
ValueAt(the learning delivery's applicable rate date, the learning delivery's OLASS programme weighting factor)	the learning delivery is OLASS in custody
"A"	otherwise

This converts an unknown or uncertain programme weighting factor in LARS into the default "A".

the learning delivery's applicable programme weighting factor	
the learning delivery's applicable programme weighting factor stage 1	the learning delivery's applicable programme weighting factor stage 1 is currently known and the learning delivery's applicable programme weighting factor stage 1 is certain
"A"	otherwise

7.5. Specialist Resources Uplift

Programme weighting factor "G" attracts an extra uplift if the provider has been flagged as a specialist resource provider.

The uplift value is based on the ratio of 2012/13 programme weighting factors.

the learning delivery's specialist resources uplift	
192/172	the learning delivery's applicable programme weighting factor = "G" and the provider has specialist resources
1	**otherwise**

7.6. Long Term Residential College Uplift

If the aim is residential, and the provider is a long term residential college (LTRC), then the funding is uplifted.

the learning delivery's LTRC uplift	
4.7	the provider is a long term residential college and the learning delivery is residential
1	**otherwise**

8. Funding

This section contains the main funding calculation.

8.1. Apprenticeship Age Factor

For apprenticeship aims which are part of frameworks, apply factors to 16-18 Apprenticeships and 24+ Apprenticeships. These factors are based on the relationships between the 2012/13 National Rates between 16-18, 19-24 and 25+ Apprenticeships.

the learning delivery's Apprenticeship age factor	
0	the learning delivery's funding line type = "None"
the default Apprenticeship age factor	the learning delivery is not an Apprenticeship programme aim and the learning delivery is not an Apprenticeship component aim
the 24+ Apprenticeship age factor	the learning delivery's funding line type = "24+ Apprenticeship"
the default Apprenticeship age factor	the learning delivery's funding line type = "19-23 Apprenticeship"
the 16-18 Apprenticeship age factor	the learning delivery's funding line type = "16-18 Apprenticeship"
the default Apprenticeship age factor	otherwise

8.2. Functional Skills Adjustment Factor

Apply a reduction to the funding if the aim is a 16-18 Apprenticeship Functional Skill.

The general principle is that learners on existing apprenticeship Frameworks should have the same rate in 2013/14 and beyond as at the end of 2012/13.

Between 2012/13 and 2013/14, the rate for Functional Skills increased, but at the same time the Government contribution for 19+ apprenticeship Functional Skills changed from 82.5% to 50%. The overall effect is that Functional Skills which are co-funded for 19+ learners have the same effective rate as in 2012/13.

However, in order to maintain the 2012/13 rates for fully-funded 16-18 learners, a further factor is applied to 16-18 Apprenticeship Functional Skills, based on the ratio of the Government contributions in 2012/13 and 2013/14.

the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor	
(1 - the national non-government percentage) / (1 - the 2012/2013 functional skills fee proportion)	the learning delivery's funding line type = "16-18 Apprenticeship" and the learning delivery is an Apprenticeship Functional Skills aim
1	otherwise

8.3. Large Employer Factor

Apply a reduction to the funding if the provider is a large employer and it is a 19-23 or 24+ Apprenticeship or Workplace learning aim. The logic also applies factors for OLASS, Classroom Learning, Traineeships and 16-18 Apprenticeships, but these parameters are currently set to 1.

Providers who are directly-funded employers have the discount applied to them, regardless of the individual learner's employer. For example if a provider delivers training to employees of a smaller subcontractor, the discount would still apply.

ATA and GTA aims do not have the large employer reduction applied to them.

the learning delivery's large employer factor	
the default large employer factor	the learning delivery is not for a large employer and the provider is not a directly funded employer
the default large employer factor	the learning delivery is an ATA or GTA Apprenticeship aim
the large employer factor for 19-24 Traineeships	the learning delivery's funding line type = "19-24 Traineeship"
the large employer factor for 16-18 Apprenticeships	the learning delivery's funding line type = "16-18 Apprenticeship"
the large employer factor for 19-23 Apprenticeships	the learning delivery's funding line type = "19-23 Apprenticeship"
the large employer factor for 24+ Apprenticeships	the learning delivery's funding line type = "24+ Apprenticeship"
the large employer factor for Classroom learning	the learning delivery's funding line type = "Classroom Learning"
the large employer factor for Adult OLASS	the learning delivery's funding line type = "Adult OLASS - Learning and Skills" or the learning delivery's funding line type = "Adult OLASS - PSD"
the large employer factor for Workplace learning	the learning delivery's funding line type = "Workplace Learning"
the default large employer factor	otherwise

Find the date of the latest applicable employment status record.

For apprenticeship component aims, this is the latest employment status record which has an applicable date on or before the related apprenticeship programme aim's start date.

For other aims, this is the latest employment status record which has an applicable date on or before the aim's start date.

the learning delivery's large employer employment status date	
the latest of all the employment status's date applies for the Apprenticeship programme aim's applicable employment statuses	the learning delivery is an Apprenticeship component aim
the latest of all the employment status's date applies for the learning delivery's applicable employment statuses	otherwise

Get the employer id from that employment status record.

the learning delivery's large employer id	
InstanceValueIf(the Apprenticeship programme aim's applicable employment statuses, the employment status's employer identifier, the employment status's date applies = the learning delivery's large employer employment status date)	the learning delivery is an Apprenticeship component aim
InstanceValueIf(the learning delivery's applicable employment statuses, the employment status's employer identifier, the employment status's date applies = the learning delivery's large employer employment status date)	**otherwise**

Determine whether that employment status record's employer id is for a large employer. There is a workaround to convert the boolean large employer attribute into "Y"/"N" and back again because InstanceValueIf doesn't work with booleans.

the employment status's large employer flag	
"Y"	it is currently known whether the employment status's employer identifier is a large employer and the employment status's employer identifier is a large employer
"N"	**otherwise**

the learning delivery's large employer flag	
InstanceValueIf(the Apprenticeship programme aim's applicable employment statuses, the employment status's large employer flag, the employment status's date applies = the learning delivery's large employer employment status date)	the learning delivery is an Apprenticeship component aim
InstanceValueIf(the learning delivery's applicable employment statuses, the employment status's large employer flag, the employment status's date applies = the learning delivery's large employer employment status date)	**otherwise**

the learning delivery is for a large employer	
true	the learning delivery's large employer flag is currently known and the learning delivery's large employer flag is certain and the learning delivery's large employer flag = "Y"
false	**otherwise**

8.4. Start Indicator

The aim counts as a start for funding purposes if it has no actual end date, or if it has achieved, or if the actual number of days in learning meets the threshold number of days.

the learning delivery is a start for funding purposes	
false	the learning delivery is a non-funded Apprenticeship aim
true	the learning delivery's learning actual end date is unknown
true	the learning delivery's outcome is currently known and anythe learning delivery's outcome = 1 or the learning delivery's outcome = 6 or the learning delivery's outcome = 7
true	the learning delivery's actual number of days in learning is currently known and thelearning delivery's threshold days is currently known and the learning delivery's actual number of days in learning >= the learning delivery's threshold days
false	otherwise

8.5. Base Aim Values

The aim value is the weighted base rate from LARS multiplied by all of the previously calculated adjustment factors.

the learning delivery's aim value	
the learning delivery's applicable weighted rate * the learning delivery's Apprenticeship age factor * the learning delivery's specialist resources uplift * the learning delivery's LTRC uplift * the learning delivery's adjusted area cost factor * the learning delivery's adjusted disadvantage uplift * the learning delivery's large employer factor * the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

This is the unweighted base rate from LARS.

the learning delivery's base unweighted value	
the learning delivery's applicable unweighted rate	the learning delivery is a start for funding purposes and the learning delivery's funding line type <> "None"
0	otherwise

8.6.   Non-Government Contribution

If the aim is co-funded, and is an apprenticeship, the non-government contribution is half of the weighted aim value. If the aim is co-funded, and is not an apprenticeship, the non-government contribution is half of the unweighted aim value.

the learning delivery's non-government contribution	
0	the learning delivery is fully funded
the learning delivery's aim value * the national non-government percentage	the learning delivery is not fully funded and the learning delivery is an Apprenticeship
the learning delivery's base unweighted value * the national non-government percentage	the learning delivery is not fully funded and the learning delivery is not an Apprenticeship
0	otherwise

8.7.   Proportion of Funding Remaining

This is a combination of the funding adjustment for prior learning and the other funding adjustment multiplied together.

This factor is applied to monthly instalments (on-programme and balancing).

the learning delivery's proportion of funding remaining	
the learning delivery's other funding adjustment / 100 * the learning delivery's funding adjustment for prior learning / 100	the learning delivery's other funding adjustment is currently known and the learning delivery's funding adjustment for prior learning is currently known
the learning delivery's other funding adjustment / 100	the learning delivery's other funding adjustment is currently known
the learning delivery's funding adjustment for prior learning / 100	the learning delivery's funding adjustment for prior learning is currently known
1	otherwise

In some cases, the funding adjustment factors are also applied to the achievement cash (including job outcome payments).

The other funding adjustment always applies across all cash values.

The adjustment for prior learning applies to the achievement cash if the aim is not a restart.

the learning delivery's proportion of funding remaining for achievement	
the learning delivery's other funding adjustment / 100	the learning delivery is a restart and the learning delivery's other funding adjustment is currently known
the learning delivery's proportion of funding remaining	the learning delivery is not a restart
1	otherwise

8.8. Number of Instalments Per Period

The aim always receives a double instalment in the first period and a single instalment in subsequent periods, up to the earlier of the planned end date and actual end date.

From the second period onwards, the aim only receives funding if it reaches the end of that period.

	the learning delivery's number of instalments this period
2	TemporalOnOrAfter(the beginning of the learning delivery's start date period) and
	TemporalBefore(the date 1 months after the beginning of the learning delivery's start date period)
1	the learning delivery's learning actual end date is currently known and
	TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and
	TemporalBefore(the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date)
1	the learning delivery's learning actual end date is unknown and
	TemporalOnOrAfter(the date 1 months after the beginning of the learning delivery's start date period) and
	TemporalBefore(the beginning of the period the day after the learning delivery's planned end date)
0	otherwise

8.9. Planned, Actual and Outstanding Instalments

This is planned number of instalments for the aim, which is the number of periods between the start date and the planned end date, with two instalments in the first period.

	the learning delivery's planned instalments
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the beginning of the period the day after the learning delivery's planned end date	otherwise

This is the number of periods between the start date and the earlier of the planned end date and actual end date, with two instalments in the first period.

	the learning delivery's actual instalments
the learning delivery's planned instalments	the learning delivery's learning actual end date is unknown
0	the learning delivery is not a start for funding purposes
2	the learning delivery's planned end date and start date are in the same period or
	the learning delivery's actual end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date	otherwise

This is the difference between the number of planned instalments and the number of actual instalments. This is used to calculate the balancing payment, as detailed elsewhere, if applicable.

the learning delivery's outstanding instalments = the learning delivery's planned instalments - the learning delivery's actual instalments

8.10. On-Programme Payments

This is a time-based attribute which is the percentage of the aim value that will be paid as on-programme funding in each period.

It is calculated as 100% minus the amount held back for achievement, multiplied by the proportion of funding remaining, and then divided up among the planned instalments.

For transitional aims continuing from 2012/13, the percentage is calculated in the transitional calculation.

The same percentage value is used to calculate the uncapped on-programme cash, and then the main cash value.

the learning delivery's on-programme percentage	
the learning delivery's transitional on-programme percentage	the learning delivery is transitional
(1 - the default total achievement percentage) * the learning delivery's number of instalments this period / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining	the learning delivery is a start for funding purposes and the date is in the current funding year
0	otherwise

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values.

the learning delivery's uncapped on-programme cash	
the learning delivery's base unweighted value * the learning delivery's on-programme percentage	the learning delivery is a start for funding purposes and the date is in the current funding year
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the on-programme percentage calculated above and the cap factor.

the learning delivery's on-programme cash	
(the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's on-programme percentage * the learning delivery's cap factor	the learning delivery is a start for funding purposes and the date is in the current funding year
0	otherwise

8.11. Balancing Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a balancing payment.

For non-transitional learners, it is calculated as 100% minus the amount held back for achievement, multiplied by the proportion of funding remaining, and then divided up among the planned instalments, and the date is assigned to the period of the actual end date.

Balancing payments are only generated if the learning aim has been achieved.

For transitional aims continuing from 2012/13, the percentage, and temporal information on when it applies, are calculated in the transitional calculation.

The same percentage value is used to calculate the uncapped balancing cash, and then the main cash value.

the learning delivery's balancing percentage	
the learning delivery's transitional balancing percentage	the learning delivery is transitional
(1 - the default total achievement percentage) * the learning delivery's outstanding instalments / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining	the learning delivery has been achieved and the learning delivery's planned instalments > 0 and the date is in the learning delivery's actual end date period
0	otherwise

The uncapped cash values are used to calculate the cap factor, which in turn is used to calculate the capped cash values.

the learning delivery's uncapped balancing payment cash = the learning delivery's base unweighted value * the learning delivery's balancing percentage

This is the weighted aim value minus the non-government contribution, multiplied by the balancing percentage calculated above and the cap factor.

the learning delivery's balancing payment cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's balancing percentage * the learning delivery's cap factor

8.12.   Eligibility for Aim Achievement Payment

An aim is considered to be achieved if its completion status is 'Completed', its outcome is 'Achieved', and it has an actual end date.

the learning delivery has been achieved if

> the learning delivery's completion status is currently known and
>
> the learning delivery's completion status = 2 and
>
> the learning delivery's outcome is currently known and
>
> any
>
>> the learning delivery's outcome = 1 or
>>
>> the learning delivery's outcome = 6 or
>>
>> the learning delivery's outcome = 7
>
> and
>
> the learning delivery's learning actual end date is currently known

An aim is eligible for an aim achievement payment if it achieves. Apprenticeship Knowledge or Competency aims are a special case because they do not receive their aim achievement payment until the related apprenticeship programme aim achieves.

The relationship between apprenticeship aims includes the pathway in this case.

the learning delivery is eligible for an aim achievement payment	
true	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery has been achieved and the learning delivery's number of Apprenticeship pathway programme aim records > 0 and for at least one of the learning delivery's Apprenticeship pathway programme aims (the programme aim) > the programme aim has been achieved
true	the learning delivery is not an Apprenticeship Knowledge or Competency aim and the learning delivery has been achieved
false	otherwise

8.13. Applicable Aim Achievement Date

The aim achievement is paid in the period of the aim's actual end date, except for apprenticeships where the aim achievement is paid in the period of the related apprenticeship programme aim's actual end date.

the learning delivery's latest Apprenticeship pathway programme aim actual end date = the learning delivery's learning actual end date which is the latest for all of the learning delivery's Apprenticeship pathway programme aims for which it is the case that the learning delivery has been achieved

the learning delivery's applicable aim achievement date	
the learning delivery's latest Apprenticeship pathway programme aim actual end date	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery is eligible for an aim achievement payment **Knowledge and Competency aims receive their achievement payment on the related programme aim's actual end date.**
the learning delivery's learning actual end date	the learning delivery is eligible for an aim achievement payment
uncertain	otherwise

the beginning of the learning delivery's aim achievement payment period = MakeDate(ExtractYear(the learning delivery's applicable aim achievement date), ExtractMonth(the learning delivery's applicable aim achievement date), 1)

This is a time-based attribute which is set to True for every day in the period of the aim's applicable achievement date. This is used when assigning the achievement payment.

the date is in the learning delivery's aim achievement payment period	
true	the beginning of the learning delivery's aim achievement payment period is currently known and the beginning of the learning delivery's aim achievement payment period is certain and TemporalOnOrAfter(the beginning of the learning delivery's aim achievement payment period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's aim achievement payment period) and the date is in the current funding year
false	otherwise

8.14. Aim Achievement Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as an aim achievement payment, if it is eligible. The aim achievement percentage is reduced if the aim also receives a job outcome payment.

For transitional aims continuing from 2012/13, the percentage, and temporal information on when it applies, are calculated in the transitional calculation.

the learning delivery's aim achievement percentage	
the learning delivery's transitional aim achievement percentage	the learning delivery is transitional
(the default total achievement percentage – the default job outcome percentage) * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for an aim achievement payment and the date is in the learning delivery's aim achievement payment period the learning delivery is eligible for a job outcome payment
the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for an aim achievement payment and the date is in the learning delivery's aim achievement payment period and the learning delivery is not eligible for a job outcome payment
0	otherwise

This is the weighted aim value minus the non-government contribution, multiplied by the achievement percentage calculated above and the cap factor.

the learning delivery's aim achievement cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's aim achievement percentage * the learning delivery's cap factor

This achievement element cash value is not used elsewhere in the calculation, but is produced as an output to aid interpretation of the funding calculation results.

It represents the maximum achievement cash that a learner might generate if they achieve, and stays the same regardless of whether the learner actually achieves the aim or a job outcome.

the learning delivery's achievement element	
(the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's transitional achievement percentage held back * the learning delivery's cap factor	the learning delivery is transitional
(the learning delivery's aim value - the learning delivery's non-government contribution) * the default total achievement percentage * the learning delivery's cap factor * the learning delivery's proportion of funding remaining for achievement	otherwise

8.15. Eligibility for Job Outcome Payment

The aim is eligible for a job outcome payment if it is Classroom learning, has an actual end date which is on or after 1 August 2012, and has an employment outcome of 'Employed'.

the learning delivery is eligible for a job outcome payment	
true	the learning delivery is Classroom learning and the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than 2012-08-01 and the learning delivery's employment outcome is currently known and any - the learning delivery's employment outcome = 1 or - the learning delivery's employment outcome = 2
false	**otherwise**

8.16. Job Outcome Payment

This is a time-based attribute which is the percentage of the aim value that will be paid as a job outcome payment, if it is eligible for one.

the learning delivery's job outcome percentage	
the learning delivery's transitional job outcome percentage	the learning delivery is transitional
the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement	the learning delivery is eligible for a job outcome payment and the date is in the learning delivery's actual end date period
0	**otherwise**

This is the weighted aim value minus the non-government contribution, multiplied by the job outcome percentage calculated above and the cap factor.

the learning delivery's job outcome cash = (the learning delivery's aim value - the learning delivery's non-government contribution) * the learning delivery's job outcome percentage * the learning delivery's cap factor

9. Cap Factor

A funding cap applies to each learner with the provider for each year, across all Adult Skills Budget provision, except Apprenticeships. The funding cap will be £4,400 per learner per year, before any weightings or government contribution calculations are applied.

Total the uncapped on-programme and balancing funding for the learner. Note that apprenticeships are excluded from the total, and that achievement funding is not part of the calculation of the cap. However the resultant cap factor is applied to achievement funding if there is any.

The IntervalDailySumIf function converts the time-based on-programme and balancing payments into a single non time-based value, using the values as at the last day of each period.

the learner's total uncapped funding = IntervalDailySumIf(the current funding year start date, the date 1 days after the current funding year end date, ((the learning delivery's uncapped on-programme cash totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is not an Apprenticeship) + (the learning delivery's uncapped balancing payment cash totalled for all of the learner's learning deliveries for which it is the case that the learning delivery is not an Apprenticeship)), the date is the last day of the period)

Because the value of £4,400 is based on full rates, but achievement is not used as part of calculating the cap factor, the limit value is reduced by the achievement percentage. This limit ('yearly cap amount excluding achievement') is 80% of £4,400, which is £3,520.

Cap the learner's funding if it goes over the yearly cap amount (excluding achievement). For example, if the total un-capped funding is twice the yearly cap amount, the cap factor would be 50%.

the learner's cap factor	
the yearly cap amount excluding achievement / the learner's total uncapped funding	the learner's total uncapped funding > the yearly cap amount excluding achievement
1	otherwise

Apply the learner's cap factor to all non-apprenticeship learning deliveries. This is because capping is not applied to apprenticeships.

the learning delivery's cap factor	
1	the learning delivery is an Apprenticeship
the learner's cap factor	otherwise

10. Learning Support Funding

Determine the Learning Support rate based on the funding line type. Currently all funding line types attract the same rate but by holding the rates in this way there is flexibility to hold differing rates in future, if required.

the learning delivery's LSF rate	
150	the learning delivery's funding line type = "Adult OLASS - Learning and Skills"
150	the learning delivery's funding line type = "Adult OLASS - PSD"
150	the learning delivery's funding line type = "Classroom Learning"
150	the learning delivery's funding line type = "Workplace Learning"
150	the learning delivery's funding line type = "19-24 Traineeship"
150	the learning delivery's funding line type = "16-18 Apprenticeship"
150	the learning delivery's funding line type = "19-23 Apprenticeship"
150	the learning delivery's funding line type = "24+ Apprenticeship"
0	**otherwise**

Aims are only eligible for Learning Support in a period if the start date is in that period, the actual end date (if known) reaches the end of that period, the Learning Delivery FAM's 'from' date is in that period, and the Learning Delivery FAM's 'to' date reaches the end of that period. Also an aim must have a planned (and actual if known) length of at least one calendar month to be eligible for LSF.

the learning delivery is eligible for LSF in the period	
false	the learning delivery is not a start for funding purposes or the learning delivery's learning planned end date is earlier than the date 1 months after the learning delivery's learning start date

true	the learning delivery's learning actual end date is currently known and
	 the learning delivery's number of FAM records > 0 and
	 for at least one of the learning delivery's FAMs
	
	     the learning delivery FAM's upper case type = "LSF" and
	     the learning delivery FAM's code = "1" and
	     TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period)
	     TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)
	
	 and
	 the date is in the current funding year and
	 TemporalOnOrAfter(the beginning of the learning delivery's start date period)
	 TemporalBefore(the beginning of the period the day after the learning delivery's actual end date)

true	the learning delivery's learning actual end date is unknown and
	 the learning delivery's number of FAM records > 0 and
	 for at least one of the learning delivery's FAMs
	
	     the learning delivery FAM's upper case type = "LSF" and
	     the learning delivery FAM's code = "1" and
	     TemporalOnOrAfter(the beginning of the learning delivery FAM's from date period)
	     TemporalBefore(the beginning of the period the day after the learning delivery FAM's to date)
	
	 and
	 the date is in the current funding year and
	 TemporalOnOrAfter(the beginning of the learning delivery's start date period)

false	**otherwise**

The next steps are to deal with the cases when two or more aims for the same learner are flagged with Learning Support - the ILR value 'LSF'.

Each learner only generates a maximum of one Learning Support payment per month, even if all their aims are flagged with LSF. Because all funding outputs are at aim level, a priority order is used to work out which aim should be allocated that learner's Learning Support value for that month.

The priority order for choosing which aim is allocated the funding is as follows:

(a)   Look for the highest Learning Support rate that month. An aim which has been flagged with the LSF code will be given higher priority than an aim which wasn't flagged. If two or more aims are flagged then currently they all have the same the same Learning Support rate, but this also future-proofs against scenarios when the rates might vary, in which case the highest rate would takes priority.

(b)   If multiple aims have the same rate, then apprenticeship and Traineeship Programme aims are higher priority than other aims (because the LSF value should be recorded in ILR against the Programme aims).

(c)   If there are multiple Programme aims, or if the learner is not on an apprenticeship or Traineeship, find the aim with the earliest start date. This reduces cases when the Learning Support funding generated would moves from one aim to another during the learner's programme.

(d)   If there are multiple aims starting on the same date (with other previous criteria equal) use the aim with the lowest sequence number in the ILR data.

Find the highest LSF rate across all of the aims which are eligible for LSF.

the learner's highest LSF rate = the learning delivery's LSF rate which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery is eligible for LSF in the period

Flag the eligible aims which have the highest LSF rate.

the learning delivery's LSF rate is the highest priority if

> the learning delivery is eligible for LSF in the period and
>
> the learning delivery's LSF rate = the learner's highest LSF rate

Find the LSF aim type priority across all of the aims.

the learning delivery's LSF aim type	
2	the learning delivery is an Apprenticeship programme aim or the learning delivery is a Traineeship programme aim
1	otherwise

Find the highest LSF aim type across all of the eligible aims which have the highest LSF rate.

the learner's highest LSF aim type = the learning delivery's LSF aim type which is the greatest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF rate is the highest priority

Flag eligible aims which have the highest LSF rate and highest LSF aim type.

the learning delivery's LSF aim type is the highest priority if

> the learning delivery is eligible for LSF in the period and
>
> the learning delivery's LSF rate is the highest priority and
>
> the learning delivery's LSF aim type = the learner's highest LSF aim type

Find the earliest start date across all of the eligible aims which have the highest LSF rate and highest LSF aim type.

the learner's earliest LSF start date = the learning delivery's learning start date which is the earliest for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF aim type is the highest priority

Flag eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learning delivery's LSF start date is the highest priority if

the learning delivery is eligible for LSF in the period and

the learning delivery's LSF aim type is the highest priority and

the learning delivery's learning start date = the learner's earliest LSF start date

Find the lowest aim sequence number among the eligible aims which have the highest LSF rate, highest LSF aim type and earliest start date.

the learner's lowest LSF aim sequence number = the learning delivery's aim sequence number which is the least for all of the learner's learning deliveries for which it is the case that the learning delivery's LSF start date is the highest priority

Pay the LSF to the eligible aim, determined above.

the learning delivery's LSF cash	
the learning delivery's LSF rate	the learning delivery is eligible for LSF in the period and the learning delivery's aim sequence number = the learner's lowest LSF aim sequence number
0	**otherwise**

11. Transitional Learners

This section calculates funding for aims continuing from 2012/13.

The general approach is this:

(a)   The funding adjustment for prior learning is used to calculate what proportion of the 2012/13 aim value the learner would have been expected to generate, as at the start date, assuming everything was achieved.

(b)   Then, the calculation determines what proportion of the 2012/13 aim value has been generated up to 31 July 2013, using the 2012/13 earnings methods (including the funding adjustment for prior learning).

(c)   The result of (a) minus (b) is the percentage which is left to be generated from 1 August 2013 onwards. This is called the Transitional Start Proportion. This is applied to the 2014/15 aim value, which in many cases will be the same as the 2012/13 value.

(d)   Calculate the achievement percentage. In 2014/15 this is usually 20% but in some cases it is affected by the funding adjustment factors. Also, if (c) is already less than the default achievement element, all of (c) becomes the achievement percentage.

(e)   If the learner is eligible for a job outcome payment on or after 1 August 2013, then half of (d) is allocated to a job outcome percentage. This is usually 10%, but it may not be if (d) is not 20%.

(f)   What is left after subtracting (d) from (c) is allocated to monthly instalments and apportioned over planned periods from 1 August 2013. If there are no planned periods after 1 August then all of {(c) minus (d)} becomes a balancing percentage in August 2013, as long as the aim is achieved.

(g)   If the learner's actual periods on the aim (from 1 August 2013 onwards) are less than the planned periods (from 1 August 2013 onwards), and they achieve the aim, they generate a balancing percentage in the period of the actual end date, using the normal earnings method as applied to (f).

(h)   If the learner achieves the aim, they generate the achievement percentage in (d) (minus (e) if applicable) in the period of the actual end date. If the actual end date is before 1 August 2013, and the achievement date is on or after 1 August 2013, then achievement is assigned to the August 2013 period. For Knowledge and Competency aims, achievement is only generated when the learner achieves the framework as well as the aim, and the period used is the actual end date of the whole framework, or August 2013 if that actual end date is before 1 August 2013 and the achievement date is after 31 July 2013.

11.1.   Parameters

This is the date that the funding methodology changed. Aims which start before this date are considered transitional, assuming they meet the other transitional criteria detailed below. Also define the end of the transition period (in practice, the end of August) because aims ending before 31 August are treated as ending in a previous funding year.

the funding method transition date = 2013-08-01

the end of the funding method transition period = the date 1 days before the date 1 months after the funding method transition date

This is the achievement percentage that was used in the 2012/13 funding calculation, as it is different to the 2014/15 achievement percentage.

the default 2012/2013 total achievement percentage = 25%

11.2. Funding Model

Determine whether the aim was Employer Responsive Other (old funding model 45) or Adult Learner Responsive (old funding model 22) in 2012/13.

the learning delivery was Employer Responsive Other if

the learning delivery's adjusted start date is earlier than the funding method transition date and

the learning delivery is not an Apprenticeship and

the learning delivery is not OLASS in custody

any

> the learning delivery is Workplace learning or
>
> all
>
> > the learning delivery's LDM 1 FAM code is currently known and
> >
> > the learning delivery's LDM 1 FAM code = 125
>
> or
>
> all
>
> > the learning delivery's LDM 2 FAM code is currently known and
> >
> > the learning delivery's LDM 2 FAM code = 125
>
> or
>
> all
>
> > the learning delivery's LDM 3 FAM code is currently known and
> >
> > the learning delivery's LDM 3 FAM code = 125
>
> or
>
> all
>
> > the learning delivery's LDM 4 FAM code is currently known and
> >
> > the learning delivery's LDM 4 FAM code = 125

the learning delivery was Adult Learner Responsive if

the learning delivery's adjusted start date is earlier than the funding method transition date and

the learning delivery is not an Apprenticeship and

the learning delivery is not OLASS in custody and

the learning delivery was not Employer Responsive Other

11.3. Transitional Criteria

Determine if the aim has been achieved, or might potentially be achieved, on or after 1 August 2013.

the learning delivery will potentially achieve after transition if

all

> the learning delivery's achievement date is currently known and
>
> the learning delivery's achievement date is on or later than the funding method transition date

or

all

> the learning delivery's achievement date is unknown and
>
> any
>
> > the learning delivery's outcome is unknown or
> >
> > the learning delivery's outcome = 4 or
> >
> > the learning delivery's outcome = 5

Determine if the aim is a transitional apprenticeship programme aim.

It must start before 1 August 2013, be a start for funding purposes, and not be OLASS. Also it must have an actual end date which is either unknown or on or after 1 August 2013. There is a special case for aims that have an actual end date before the funding method transition date (1 August 2013) but have not yet had an achievement date recorded by then. These will not have generated achievement funding in the 2012/13 funding calculation so exceptionally the 2014/15 funding calculation uses the achievement date field to determine if it needs to generate achievement in 2014/15.

the learning delivery is a transitional Apprenticeship programme aim if	
false	the learning delivery's learning start date is on or later than the funding method transition date or
	the learning delivery is OLASS in custody or
	the learning delivery was Adult Learner Responsive or
	the learning delivery is not a start for funding purposes or
	the learning delivery is not an Apprenticeship programme aim
true	the learning delivery's learning actual end date is unknown
true	the learning delivery's learning actual end date is on or later than the funding method transition date
true	the learning delivery will potentially achieve after transition
false	otherwise

The aim is transitional if they are still in learning (or waiting for achievement) on 1 August 2013, even though they might get no on-programme funding because they have passed their planned end date.

Apprenticeship Knowledge and Competency component aims are counted as transitional if their related apprenticeship programme aim is transitional. This is wider than just the Competency aims because Knowledge aims didn't have achievement held back in 2012/13 but if they run through the normal calculation it will try to give them 20% achievement in 2014/15 when the Framework is achieved.

Other aims in apprenticeships (for example Functional Skills) don't inherit transitional status from the programme aim because they would not generate achievement when the programme aim achieves in either the 2012/13, 2013/14 or 2014/15 calculations.

the learning delivery is transitional	
false	the learning delivery's learning start date is on or later than the funding method transition date or
	the learning delivery is OLASS in custody or
	the learning delivery is not a start for funding purposes
true	the learning delivery's learning actual end date is unknown
true	the learning delivery's learning actual end date is on or later than the funding method transition date
true	the learning delivery was not Adult Learner Responsive and
	the learning delivery will potentially achieve after transition
true	the learning delivery is an Apprenticeship Knowledge or Competency aim and
	for at least one of the learning delivery's Apprenticeship pathway programme aims (the programme aim)
	the programme aim is a transitional Apprenticeship programme aim
false	otherwise

11.4. Pre-Transition Instalments

This is the number of on-programme instalments paid before 1 August 2013, for aims that were funded using funding model 45 in 2012/13.

the learning delivery's pre-transitional actual instalments		
0	the learning delivery is not transitional or all	
		the learning delivery was not Employer Responsive other and the learning delivery is not an Apprenticeship
the learning delivery's actual instalments	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is earlier than the funding method transition date	
2	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date and any	
		the learning delivery's actual end date and start date are in the same period or the learning delivery's planned end date and start date are in the same period
1 + the number of months from the beginning of the learning delivery's start date period to the earliest of the funding method transition date and the beginning of the period the day after the learning delivery's planned end date	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date	
the learning delivery's planned instalments	the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is earlier than the funding method transition date	
2	the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is on or later than the funding method transition date and the learning delivery's planned end date and start date are in the same period	
1 + the number of months from the beginning of the learning delivery's start date period to the funding method transition date	the learning delivery's learning actual end date is unknown and the learning delivery's learning planned end date is on or later than the funding method transition date	
0	otherwise	

This is the number of on-programme instalments which would have been paid as a balancing payment before 1 August 2013.

the learning delivery's pre-transitional balancing instalments	
the learning delivery's planned instalments - the learning delivery's actual instalments	the learning delivery is transitional and the learning delivery's achievement date is currently known and the learning delivery's achievement date is earlier than the funding method transition date
0	otherwise

This is the planned number of days before 1 August 2013.

the learning delivery's pre-transitional planned number of days = (the number of days from the learning delivery's learning start date to the earliest of the date 1 days before the funding method transition date and the learning delivery's learning planned end date) + 1

11.5. Pre-Transition Achievement Percentage

This is the percentage of achievement held back from the aim before 1 August 2013. Only applicable to aims funded through Funding Model 45 in 2012/13, and within apprenticeships, only Competency aims.

There are both "scaled" and "unscaled" values depending on the proportion of funding remaining for achievement; both values are required later.

the learning delivery's pre-transitional achievement percentage held back unscaled	
the default 2012/2013 total achievement percentage	the learning delivery is transitional and any the learning delivery was Employer Responsive Other or the learning delivery is an Apprenticeship Competency aim
0	otherwise

the learning delivery's pre-transitional proportion of funding remaining for achievement	
the learning delivery's other funding adjustment / 100	the learning delivery's other funding adjustment is currently known
1	otherwise

the learning delivery's pre-transitional achievement percentage held back = the learning delivery's pre-transitional achievement percentage held back unscaled * the learning delivery's pre-transitional proportion of funding remaining for achievement

11.6. Pre-Transition On-Programme Percentage

This is the percentage of on-programme and balancing funding received before 1 August 2013.

the learning delivery's pre-transitional on-programme percentage	
0	the learning delivery is not transitional
(the learning delivery's pre-transitional actual instalments + the learning delivery's pre-transitional balancing instalments) / the learning delivery's planned instalments * the learning delivery's proportion of funding remaining * (1 - the learning delivery's pre-transitional achievement percentage held back unscaled)	the learning delivery was Employer Responsive Other or the learning delivery is an Apprenticeship
the learning delivery's pre-transitional planned number of days / the learning delivery's planned number of days in learning * the learning delivery's proportion of funding remaining	the learning delivery was Adult Learner Responsive
0	otherwise

11.7. Pre-Transition Job Outcome Percentage

This is the job outcome percentage that the aim received in 2012/13.

the learning delivery's pre-transitional job outcome percentage		
the default job outcome percentage * the learning delivery's pre-transitional proportion of funding remaining for achievement	the learning delivery is transitional and the learning delivery was Employer Responsive Other and the learning delivery is Classroom learning and the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than 2012-08-01 and the learning delivery's learning actual end date is earlier than the funding method transition date and the learning delivery's employment outcome is currently known and any	
		the learning delivery's employment outcome = 1 or the learning delivery's employment outcome = 2
O	otherwise	

11.8. Transitional Start Proportion

This is one of the main results in the transitional calculation. It represents the total percentage of the aim rate (on-programme, balancing and achievement) which is left at 1 August 2013, and is used as the baseline amount from which 2014/15 funding is apportioned.

The principle is to take the percentage which the aim would have been expected to generate as at the start, and subtract what has been generated before 1 August 2013.

This is the achievement held back before 1 August 2013 (minus any job outcome already earned), plus the maximum potential on-programme and balancing at start, minus the amount of on-programme (including balancing) received before 1 August 2013.

the learning delivery's transitional start proportion	
the learning delivery's pre-transitional achievement percentage held back - the learning delivery's pre-transitional job outcome percentage + (the learning delivery's proportion of funding remaining * (1 - the learning delivery's pre-transitional achievement percentage held back unscaled)) - the learning delivery's pre-transitional on-programme percentage	the learning delivery is transitional
O	otherwise

11.9. Transitional Achievement Percentage

This is the percentage of achievement (aim achievement plus job outcome) held back from 1 August 2013.

This uses the 2014/15 achievement percentage, adjusted for the proportion of funding remaining and job outcomes already generated before 1 August, unless the total amount left as at 1 August 2013 (transitional start proportion) is less than the normal achievement value.

the learning delivery's transitional achievement percentage held back	
0	the learning delivery is not transitional
the learning delivery's transitional start proportion	((the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement) - the learning delivery's pre-transitional job outcome percentage) > the learning delivery's transitional start proportion
(the default total achievement percentage * the learning delivery's proportion of funding remaining for achievement) - the learning delivery's pre-transitional job outcome percentage	otherwise

11.10. Transitional Instalments

This is the number of planned on-programme instalments from 1 August 2013. The aim receives a double instalment in August 2013 if the aim (planned end date) reaches the end of August, and if the extra instalments parameter is set, and then a single instalment in subsequent periods if the aim reaches the end of that period. Any aim that wasn't planned to reach the end of August has already had all of its on-programme (possibly not balancing) instalments in 2012/13.

the learning delivery's transitional planned instalments	
0	the learning delivery is not transitional
1	the learning delivery's learning planned end date = the end of the funding method transition period
(the number of months from the funding method transition date to the beginning of the period the day after the learning delivery's planned end date)	the learning delivery's learning planned end date is later than the end of the funding method transition period
0	otherwise

This is the number of actual on-programme instalments from 1 August 2013. It is calculated in the same way as the attribute above, except for using the earliest of the aim's planned and actual end dates, if the actual end date is known, or just the planned end date if not.

the learning delivery's transitional actual instalments	
0	the learning delivery is not transitional
the learning delivery's transitional planned instalments	the learning delivery's learning actual end date is unknown
1	the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date = the end of the funding method transition period
(the number of months from the funding method transition date to the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date)	the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date is later than the end of the funding method transition period
0	otherwise

This is the number of outstanding on-programme instalments which will be included in the balancing payment.

the learning delivery's transitional outstanding instalments = the learning delivery's transitional planned instalments - the learning delivery's transitional actual instalments

This is the number of on-programme instalments per period, from 1 August 2013. This is a time-based attribute with each period in the current funding year having a value of 0 or 1. The aim receives a double instalment in August 2013 if the aim (planned end date) reaches the end of August, and if the extra instalments parameter is set, and then a single instalment in subsequent periods if the aim reaches the end of that period.

the learning delivery's transitional number of instalments this period	
0	the learning delivery is not transitional
1	the learning delivery's learning actual end date is currently known and TemporalOnOrAfter(the funding method transition date) and TemporalBefore(the earliest of the beginning of the period the day after the learning delivery's actual end date and the beginning of the period the day after the learning delivery's planned end date) and the earliest of the learning delivery's learning planned end date and the learning delivery's learning actual end date is on or later than the end of the funding method transition period
1	the learning delivery's learning actual end date is unknown and TemporalOnOrAfter(the funding method transition date) and TemporalBefore(the beginning of the period the day after the learning delivery's planned end date) and the learning delivery's learning planned end date is on or later than the end of the funding method transition period
0	otherwise

11.11.   Transitional On-Programme Percentage

This is the percentage of the aim value that is paid as on-programme payments. This is a time-based attribute which only has values in the periods in which the aim receives on-programme payments (because the variable 'the learning delivery's transitional number of instalments this period' is time-based).

the learning delivery's transitional on-programme percentage	
(the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back) * the learning delivery's transitional number of instalments this period / the learning delivery's transitional planned instalments	the learning delivery is a start for funding purposes and the learning delivery is transitional and the learning delivery's transitional planned instalments > 0 and the date is in the current funding year
0	otherwise

11.12.   Transitional Balancing Percentage

This is the date on which the balancing payment is paid, that is, the aim's actual end date.

the learning delivery's transitional balancing payment date	
the learning delivery's learning actual end date	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery's learning actual end date is currently known
uncertain	otherwise

the beginning of the learning delivery's transitional balancing payment period =
MakeDate(ExtractYear(the learning delivery's transitional balancing payment date),
ExtractMonth(the learning delivery's transitional balancing payment date), 1)

This is a time-based attribute which is only set to True in the period in which the balancing payment is to be paid.

the date is in the learning delivery's transitional balancing payment period	
true	the beginning of the learning delivery's transitional balancing payment period is currently known and
	the beginning of the learning delivery's transitional balancing payment period is certain and
	TemporalOnOrAfter(the beginning of the learning delivery's transitional balancing payment period) and
	TemporalBefore(the date 1 months after the beginning of the learning delivery's transitional balancing payment period) and
	the date is in the current funding year
false	otherwise

This is the percentage of the aim value that is to be paid as a balancing payment.

If there are any planned instalments in 2013/14, it will be the outstanding number of monthly instalments using the standard value for instalments after 1 August.

If there are no planned instalments in 2013/14, it will be the remaining funding left after subtracting achievement from the transitional start proportion.

The effect is to include the 5% achievement due to the difference in achievement percentage between 2012/13 and 2013/14 in the balancing payment if there are no on-programme payments in 2013/14.

This is a time-based attribute which only has a value in the period in which the balancing payment is to be paid.

the learning delivery's transitional balancing percentage	
0	the learning delivery is not transitional or
	the learning delivery has not been achieved or
	the learning delivery's transitional balancing payment date is unknown or
	the learning delivery's transitional balancing payment date is uncertain
the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back	the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back > 0 and
	the learning delivery's transitional planned instalments = 0 and
	the date is in the learning delivery's transitional balancing payment period
(the learning delivery's transitional start proportion - the learning delivery's transitional achievement percentage held back) * the learning delivery's transitional outstanding instalments / the learning delivery's transitional planned instalments	the learning delivery's transitional planned instalments > 0 and
	the date is in the learning delivery's transitional balancing payment period
0	otherwise

11.13. Transitional Job Outcome Percentage

This is the percentage of the aim value that is held back for a job outcome payment.

the learning delivery's transitional job outcome percentage held back	
0	the learning delivery is not transitional or the learning delivery is not eligible for a job outcome payment or the learning delivery's learning actual end date is earlier than the funding method transition date
the learning delivery's transitional achievement percentage held back / 2	(the learning delivery's transitional achievement percentage held back) / 2 < (the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement)
the default job outcome percentage * the learning delivery's proportion of funding remaining for achievement	otherwise

This is the above percentage converted into a time-based attribute which only has a value in the period in which the job outcome payment is to be paid, that is, the aim's actual end date.

the learning delivery's transitional job outcome percentage	
the learning delivery's transitional job outcome percentage held back	the date is in the learning delivery's actual end date period
0	otherwise

11.14. Transitional Aim Achievement Percentage

This is the date on which the aim achievement payment is to be paid.

the learning delivery's transitional aim achievement payment date	
uncertain	the learning delivery is not eligible for an aim achievement payment
the learning delivery's latest Apprenticeship pathway programme aim actual end date	the learning delivery is an Apprenticeship Knowledge or Competency aim and the learning delivery's latest Apprenticeship pathway programme aim actual end date is currently known and the learning delivery's latest Apprenticeship pathway programme aim actual end date is certain and the learning delivery's latest Apprenticeship pathway programme aim actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery is an Apprenticeship Knowledge or Competency aim
the learning delivery's learning actual end date	the learning delivery's learning actual end date is currently known and the learning delivery's learning actual end date is on or later than the funding method transition date
the funding method transition date	the learning delivery's learning actual end date is currently known
uncertain	otherwise

**the beginning of the learning delivery's transitional aim achievement payment period =
        MakeDate(ExtractYear(the learning delivery's transitional aim achievement payment date),
        ExtractMonth(the learning delivery's transitional aim achievement payment date), 1)**

This is a time-based attribute which is only set to True in the period in which the aim achievement payment is to be paid.

the date is in the learning delivery's transitional aim achievement payment period	
true	the learning delivery's transitional aim achievement payment date is currently known and the learning delivery's transitional aim achievement payment date is certain and TemporalOnOrAfter(the beginning of the learning delivery's transitional aim achievement payment period) and TemporalBefore(the date 1 months after the beginning of the learning delivery's transitional aim achievement payment period) and the date is in the current funding year
false	otherwise

This is the percentage of the aim value that is held back for an aim achievement payment. The aim achievement payment is reduced if the aim also has a job outcome payment. This is a time-based attribute which only has a value in the period in which the aim achievement payment is to be paid.

the learning delivery's transitional aim achievement percentage	
0	the learning delivery is not transitional or the learning delivery is not eligible for an aim achievement payment or the learning delivery's transitional aim achievement payment date is unknown or the learning delivery's transitional aim achievement payment date is uncertain
(the learning delivery's transitional achievement percentage held back - the learning delivery's transitional job outcome percentage held back)	the date is in the learning delivery's transitional aim achievement payment period and the learning delivery is eligible for a job outcome payment
the learning delivery's transitional achievement percentage held back	the date is in the learning delivery's transitional aim achievement payment period and the learning delivery is not eligible for a job outcome payment
0	otherwise

12. Entity Relationships

This section defines some inferred relationships between entities such as learning aims. For example it relates programme aims to the whole set of aims for that learner's Apprenticeship.

This relationship is used to find matching Traineeship programme aims for the Traineeship component aim. This is used to work out the start date and adjusted start date of the component aim's related programme aim.

the learning delivery (the Traineeship programme aim) is a member of the learning delivery's Traineeship programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Traineeship programme aim (the other learner)

one learner is the other learner

the Traineeship programme aim is a Traineeship programme aim and

the Traineeship programme aim's programme type = the learning delivery's programme type

This relationship is used to find matching apprenticeship programme aims for the apprenticeship component aim - not using the apprenticeship pathway. This is used to work out the start date and adjusted start date of the component aim's related programme aim.

the learning delivery (the Apprenticeship programme aim) is a member of the learning delivery's Apprenticeship programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Apprenticeship programme aim (the other learner)

one learner is the other learner

the Apprenticeship programme aim is an Apprenticeship programme aim and

the Apprenticeship programme aim's framework code is currently known and

the learning delivery's framework code is currently known and

the learning delivery's programme type is currently known and

the Apprenticeship programme aim's framework code = the learning delivery's framework code and

the Apprenticeship programme aim's programme type = the learning delivery's programme type

This relationship is used to find matching apprenticeship programme aims for the apprenticeship component aim - using the apprenticeship pathway. This is used during the achievement calculation, as certain apprenticeship component aims are not counted as achieved unless their related apprenticeship programme aim achieves.

the learning delivery (the Apprenticeship programme aim) is a member of the learning delivery's Apprenticeship pathway programme aims if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the Apprenticeship programme aim (the other learner)

one learner is the other learner

the Apprenticeship programme aim is an Apprenticeship programme aim and

the Apprenticeship programme aim's framework code is currently known and

the Apprenticeship programme aim's Apprenticeship pathway is currently known and

the learning delivery's framework code is currently known and

the learning delivery's Apprenticeship pathway is currently known and

the learning delivery's programme type is currently known and

the Apprenticeship programme aim's framework code = the learning delivery's framework code and

the Apprenticeship programme aim's Apprenticeship pathway = the learning delivery's Apprenticeship pathway and

the Apprenticeship programme aim's programme type = the learning delivery's programme type

These relationships are used to find the learner employment status records which are applicable to the learning delivery and the learning delivery's related apprenticeship programme aim. They are used during the large employer factor calculation to find the appropriate employer id.

the learner employment status is a member of the learning delivery's applicable employment statuses if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner and

the employment status's date applies <= the learning delivery's learning start date and

the employment status's employer identifier is currently known

the learner employment status is a member of the Apprenticeship programme aim's applicable employment statuses if

in the case of the learner associated with the learning delivery (one learner)

in the case of the learner associated with the learner employment status (the other learner)

one learner is the other learner and

the employment status's date applies <= the learning delivery's Apprenticeship programme start date and

the employment status's employer identifier is currently known

13. Rulebase version

the current version of the rulebase = "22.1.10"

the current version of the interface specification = "001.09"

14. Interface fields

This section lists inputs to, and outputs from the OPA Rulebase.

14.1. Inputs

Learning Delivery records, and associated records, are passed into the rulebase if Funding Model=35, and:

(a)   the Learner does not fail any ILR Validation Rules which are marked as Errors (for the Online systems) or

(b)   the Learner does not fail any ILR Validation Rules marked as SFA Funding Rules (for the offline/FIS system).

global

Public Name	OPA Local Name	Data Type	Temporal	Source
DirectFundEmp	the provider is a directly funded employer	boolean		1415.ORG_Details.DirectFundEmpIndicator
LargeEmployerVersion	the large employer reference data version	text		Reference data
LARSVersion	the LARS reference data version	text		Reference data
LTRC	the provider is a long term residential college	boolean		1415.ORG_Details.LongTermResid WHERE LearningProvider.UKPRN = Org_UKPRN
OrgVersion	the Org reference data version	text		Reference data
PostcodeAreaCostVersion	the postcode area cost reference data version	text		Reference data
PostcodeDisadvantageVersion	the postcode disadvantage reference data version	text		Reference data
SpecialistResources	the provider has specialist resources	boolean		ORG_Funding.Org_FundingFactorValue WHERE LearningProvider.UKPRN = ORG_Funding.UKPRN AND UPPER(FundingFactor) = "SPECIALIST RESOURCES" AND UPPER(FundingFactorType) = "ADULT SKILLS". True if the record exists, and is 1. False otherwise
UKPRN	the provider's UKPRN	number		ILR

Learner

Public Name	OPA Local Name	Data Type	Temporal	Source
DateOfBirth	the learner's date of birth	date		ILR
DisadvantageUplift	the learner's disadvantage uplift	number		PostcodeDisadvantage.SFAUplift (Join on LearnerContact.Postcode = Postcode. ContType = 1, LocType = 2.)
LearnRefNumber	the learner's reference number	text		ILR

LearnerEmpStat

Public Name	OPA Local Name	Data Type	Temporal	Source
DateEmpStatApp	the employment status's applicable date	date		ILR
EmpId	the employment status's employer identifier	number		ILR
LargeEmployer	the employment status's employer identifier is a large employer	boolean		LargeEmployers (True if the EmpId is in the reference table. False if not, or if the EmpId is null.)

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal	Source
AchDate	the learning delivery's achievement date	date		ILR
AdultLRWeightingFactor	the learning delivery's Adult LR programme weighting factor	text	Yes	LARS_Funding1415.WeightingFactor WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "ADULT_LR"
AdultLRUnweightedRate	the learning delivery's Adult LR unweighted rate	currency	Yes	LARS_Funding1415.RateUnweighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef

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Public Name	OPA Local Name	Data Type	Temporal	Source
				AND UPPER(FundingCategory) = "ADULT_LR"
AdultLRWeightedRate	the learning delivery's Adult LR weighted rate	currency	Yes	LARS_Funding1415.RateWeighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "ADULT_LR"
AimSeqNumber	the learning delivery's aim sequence number	number		ILR
AimType	the learning delivery's aim type	number		ILR
AreaCostFactor	the learning delivery's area cost factor	number		PostcodeAreaCost.SFA_AreaCostFactor (Join on DelLocPostcode = Postcode.)
CompStatus	the learning delivery's completion status	number		ILR
EmpOutcome	the learning delivery's employment outcome	number		ILR
ERAppWeightingFactor	the learning delivery's ER App programme weighting factor	text	Yes	LARS_Funding1415.WeightingFactor WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "APP_ACT_COST "
ERAppWeightedRate	the learning delivery's ER App weighted rate	currency	Yes	LARS_Funding1415.RateWeighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "APP_ACT_COST""
EROtherWeightingFactor	the learning delivery's ER Other programme weighting factor	text	Yes	LARS_Funding1415.WeightingFactor WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "ER_OTHER"
EROtherUnweightedRate	the learning delivery's ER Other unweighted rate	currency	Yes	LARS_Funding1415.RateUnweighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "ER_OTHER"
EROtherWeightedRate	the learning delivery's ER Other weighted rate	currency	Yes	LARS_Funding1415.RateWeighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef

Public Name	OPA Local Name	Data Type	Temporal	Source
				AND UPPER(FundingCategory) = "ER_OTHER"
FrameworkCommonCompo nent	the learning delivery's framework common component	number		LARS_1415.FrameworkCommonComponent
FrameworkComponentType	the learning delivery's framework component type	number		LARS_FrameworkAims1415.FrameworkCommonComponentType
FworkCode	the learning delivery's framework code	number		ILR
LearnActEndDate	the learning delivery's learning actual end date	date		ILR
LearnPlanEndDate	the learning delivery's learning planned end date	date		ILR
LearnStartDate	the learning delivery's learning start date	date		ILR
LrnDelFAM_EEF	the learning delivery's EEF FAM code	number		ILR from LearningDeliveryFAM where FAMType="EEF"
LrnDelFAM_FFI	the learning delivery's FFI FAM code	number		ILR from LearningDeliveryFAM where FAMType="FFI"
LrnDelFAM_LDM1	the learning delivery's LDM 1 FAM code	number		ILR from LearningDeliveryFAM where FAMType="LDM"; record 1
LrnDelFAM_LDM2	the learning delivery's LDM 2 FAM code	number		ILR from LearningDeliveryFAM where FAMType="LDM"; record 2
LrnDelFAM_LDM3	the learning delivery's LDM 3 FAM code	number		ILR from LearningDeliveryFAM where FAMType="LDM"; record 3
LrnDelFAM_LDM4	the learning delivery's LDM 4 FAM code	number		ILR from LearningDeliveryFAM where FAMType="LDM"; record 4
LrnDelFAM_RES	the learning delivery's RES FAM code	number		ILR from LearningDeliveryFAM where FAMType="RES"
LrnDelFAM_WPL	the learning delivery's WPL FAM code	number		ILR from LearningDeliveryFAM where FAMType="WPL"
MatrixWeightingFactor	the learning delivery's Matrix	text	Yes	LARS_Funding1415.WeightingFactor

Public Name	OPA Local Name	Data Type	Temporal	Source
	programme weighting factor			WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "MATRIX"
MatrixUnweightedRate	the learning delivery's Matrix unweighted rate	currency	Yes	LARS_Funding1415.RateUnweighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "MATRIX"
MatrixWeightedRate	the learning delivery's Matrix weighted rate	currency	Yes	LARS_Funding1415.RateWeighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) ="MATRIX"
OLASSWeightingFactor	the learning delivery's OLASS programme weighting factor	text	Yes	LARS_Funding1415.WeightingFactor WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "OLASS_ADULT"
OLASSUnweightedRate	the learning delivery's OLASS unweighted rate	currency	Yes	LARS_Funding1415.RateUnweighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "OLASS_ADULT"
OLASSWeightedRate	the learning delivery's OLASS weighted rate	currency	Yes	LARS_Funding1415.RateWeighted WHERE LearningDelivery.LearnAimRef = LARS_Funding1415.LearnAimRef AND UPPER(FundingCategory) = "OLASS_ADULT"
OrigLearnStartDate	the learning delivery's original learning start date	date		ILR
OtherFundAdj	the learning delivery's other funding adjustment	number		ILR
Outcome	the learning delivery's outcome	number		ILR
PriorLearnFundAdj	the learning delivery's funding adjustment for prior learning	number		ILR
ProgType	the learning delivery's programme type	number		ILR
PwayCode	the learning delivery's	number		ILR

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal	Source
	Apprenticeship pathway			
UnitType	the learning delivery's unit type	text		LARS_1415.UnitType

LearningDeliveryFAM

Public Name	OPA Local Name	Data Type	Temporal	Source
LearnDelFAMCode	the learning delivery FAM's code	text		ILR
LearnDelFAMFromDate	the learning delivery FAM's date applies from	date		ILR
LearnDelFAMToDate	the learning delivery FAM's date applies to	date		ILR
LearnDelFAMType	the learning delivery FAM's type	text		ILR

14.2. Outputs

global

Public Name	OPA Local Name	Data Type	Temporal
CurFundYr	the current funding year	text	
InterfaceVersion	the current version of the interface specification	text	
RulebaseVersion	the current version of the rulebase	text	

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal
AchApplicDate	the learning delivery's applicable aim achievement date	date	
Achieved	the learning delivery has been achieved	boolean	
AchieveElement	the learning delivery's achievement element	currency	
AchievePayElig	the learning delivery is eligible for an aim achievement payment	boolean	
AchievePayment	the learning delivery's aim achievement cash	currency	Yes
AchievePayPct	the learning delivery's aim achievement percentage	number	Yes
AchievePayPctPreTrans	the learning delivery's pre-transitional achievement percentage held back	number	
AchievePayPctTrans	the learning delivery's transitional aim achievement percentage	number	Yes
AchPayTransHeldBack	the learning delivery's transitional achievement percentage held back	number	
ActualDaysIL	the learning delivery's actual number of days in learning	number	
ActualNumInstalm	the learning delivery's actual instalments	number	
ActualNumInstalmPreTrans	the learning delivery's pre-transitional actual instalments	number	
ActualNumInstalmTrans	the learning delivery's transitional actual instalments	number	
AdjLearnStartDate	the learning delivery's adjusted start date	date	
AdltLearnResp	the learning delivery was Adult Learner Responsive	boolean	
AgeAimStart	the learning delivery's age at start	number	
AimValue	the learning delivery's aim value	currency	
AppAdjLearnStartDate	the learning delivery's adjusted Apprenticeship programme start date	date	
AppAgeFact	the learning delivery's Apprenticeship age factor	number	
AppATAGTA	the learning delivery is an ATA or GTA Apprenticeship aim	boolean	
AppCompetency	the learning delivery is an Apprenticeship Competency aim	boolean	
AppFuncSkill	the learning delivery is an Apprenticeship Functional Skills aim	boolean	
AppFuncSkill1618AdjFact	the learning delivery's 16-18 Apprenticeship Functional Skills adjustment factor	number	
AppKnowl	the learning delivery is an Apprenticeship Knowledge aim	boolean	
AppLearnStartDate	the learning delivery's Apprenticeship programme start date	date	
ApplicFundRateDate	the learning delivery's applicable rate date	date	
ApplicProgWeightFact	the learning delivery's applicable programme weighting factor	text	

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal
ApplicUnweightFundRate	the learning delivery's applicable unweighted rate	currency	
ApplicWeightFundRate	the learning delivery's applicable weighted rate	currency	
AppNonFund	the learning delivery is a non-funded Apprenticeship aim	boolean	
AreaCostFactAdj	the learning delivery's adjusted area cost factor	number	
BalancePayment	the learning delivery's balancing payment cash	currency	Yes
BalancePaymentUncapped	the learning delivery's uncapped balancing payment cash	currency	Yes
BalancePct	the learning delivery's balancing percentage	number	Yes
BalancePctTrans	the learning delivery's transitional balancing percentage	number	Yes
BalInstalmPreTrans	the learning delivery's pre-transitional balancing instalments	number	
BaseValueUnweight	the learning delivery's base unweighted value	currency	
CapFactor	the learning delivery's cap factor	number	
ClassRm	the learning delivery is Classroom learning	boolean	
DisUpFactAdj	the learning delivery's adjusted disadvantage uplift	number	
EmpOutcomePay	the learning delivery's job outcome cash	currency	Yes
EmpOutcomePayElig	the learning delivery is eligible for a job outcome payment	boolean	
EmpOutcomePct	the learning delivery's job outcome percentage	number	Yes
EmpOutcomePctHeldBackTrans	the learning delivery's transitional job outcome percentage held back	number	
EmpOutcomePctPreTrans	the learning delivery's pre-transitional job outcome percentage	number	
EmpOutcomePctTrans	the learning delivery's transitional job outcome percentage	number	Yes
EmpRespOth	the learning delivery was Employer Responsive Other	boolean	
FullyFund	the learning delivery is fully funded	boolean	
FundLine	the learning delivery's funding line type	text	
FundStart	the learning delivery is a start for funding purposes	boolean	
InstPerPeriod	the learning delivery's number of instalments this period	number	Yes
LargeEmployerID	the learning delivery's large employer id	number	
LargeEmployerSFAFctr	the learning delivery's large employer factor	number	
LargeEmployerStatusDate	the learning delivery's large employer employment status date	date	

LearningDelivery

Public Name	OPA Local Name	Data Type	Temporal
LearnSuppFund	the learning delivery is eligible for LSF in the period	boolean	Yes
LearnSuppFundCash	the learning delivery's LSF cash	currency	Yes
LTRCUpliftFctr	the learning delivery's LTRC uplift	number	
NonGovCont	the learning delivery's non-government contribution	currency	
OLASSCustody	the learning delivery is OLASS in custody	boolean	
OnProgPayment	the learning delivery's on-programme cash	currency	Yes
OnProgPaymentUncapped	the learning delivery's uncapped on-programme cash	currency	Yes
OnProgPayPct	the learning delivery's on-programme percentage	number	Yes
OnProgPayPctPreTrans	the learning delivery's pre-transitional on-programme percentage	number	
OnProgPayPctTrans	the learning delivery's transitional on-programme percentage	number	Yes
OutstndNumOnProgInstalm	the learning delivery's outstanding instalments	number	
OutstndNumOnProgInstalmTrans	the learning delivery's transitional outstanding instalments	number	
PlannedNumOnProgInstalm	the learning delivery's planned instalments	number	
PlannedNumOnProgInstalmTrans	the learning delivery's transitional planned instalments	number	
PlannedTotalDaysIL	the learning delivery's planned number of days in learning	number	
PlannedTotalDaysILPreTrans	the learning delivery's pre-transitional planned number of days	number	
PropFundRemain	the learning delivery's proportion of funding remaining	number	
PropFundRemainAch	the learning delivery's proportion of funding remaining for achievement	number	
Residential	the learning delivery is residential	boolean	
Restart	the learning delivery is a restart	boolean	
SpecResUplift	the learning delivery's specialist resources uplift	number	
StartPropTrans	the learning delivery's transitional start proportion	number	
ThresholdDays	the learning delivery's threshold days	number	
Traineeship	the learning delivery is a Traineeship	boolean	
Trans	the learning delivery is transitional	boolean	
TransInstPerPeriod	the learning delivery's transitional number of instalments this period	number	Yes
WPLProv	the learning delivery is Workplace learning	boolean	