FAQ Document

ESBS Wave 2 Learner Payments Project – ETB Information

Frequently asked questions

Contents

Learner Payments

Queries related to Learner's not receiving their payment / being paid incorrectly

A Learner has notified an ETB that they have not been paid at all, what should I do?

Answer: Access Group Managed Payroll Service (APS) process Learner payments and they can only use the data that has been posted directly to the PeopleXD system from PLSS, TACS and direct inputs to the PeopleXD system as completed by ETBs. The information entered to the PLSS and TACS system is entered by ETBs.
It is not possible for APS to pay outside of the normal Learner payment cycle as per the new Learner Payments Calendar.

In a situation where a Learner does not get paid at all, the ETB should establish why this has occurred. The most obvious rationale may include a) they were not recorded as joining the system b) no attendance was recorded on TACS or (c) that they did not provide the correct bank details.

It will also be necessary for ETBs to ensure that the reason the Learner did not get paid at all is rectified in advance of the next pay cycle.

A Learner has notified the ETB that they have been paid incorrectly, what should I do?

Answer: As stated above, it is not possible for APS to pay outside of the normal Learner payment cycle.

There are a number of reasons why the actual pay of a Learner may differ to what they expected. It is important that ETBs check their own records before progressing queries to APS.
ETBs should first check the Learner record on the PeopleXD system and TACS to ensure that they have been registered with the correct allowances / deductions and that time & attendance has been recorded correctly. These should be confirmed with the Learner and explained as they relate to the payment period / pay details in question.

If there is still a question about an unexplained difference between what the Learner thinks they should have been paid and what was actually paid, then the designated contact in the ETB should contact APS by email at mps@corehr.com.

The ETB should provide the following information to APS in order to assist in resolving the query: Payment period, Learner registration number, allowance rate, other allowances due to be paid (if applicable), deductions due to be taken (if applicable) and any relevant start and end dates. Please make it clear in the email what the query specifically relates to.

Note: To mitigate against Learners not getting paid or paid incorrectly, ETBs should consider what mechanisms could be implemented to cross-check that all hours/classes are duly uploaded to PLSS, TACS and PeopleXD system by their deadlines. Early identification of issues may facilitate notification to Learners by ETBs so that Learners can put alternative arrangements in place where necessary. Validation reports will be provided to ETBs for reconciliation before payments are approved for processing. There is also a Report Verification Checklist available [here](#) and via the Freshdesk site to outline the essential reports for checking on a weekly basis.

How do I raise a query with APS regarding Learners' pay?

Answer: Each ETB has provided a designated list of ETB contacts to APS. If an ETB needs to make an amendment to the designated ETB list of contacts, they must contact ESBS at support@appsandotherlearners.freshdesk.com. *Please note that APS can only communicate with designated people on this list.*

If a Learner is entitled to backpay, how will this be processed (this can include for example, a late notification for a pay allowance rate adjustment and situations where a Learner is late in claiming an accommodation allowance)?

Answer: The designated person from the ETB will inform APS of the requirement for backpay to the Learner by utilising the PeopleXD Temporary Adjustment Form. The template will be completed for the relevant Learner and uploaded to the SFTP by the ETB. APS will include the amendment in the next available payment cycle and the relevant payment will be made to the Learner. ETBs can submit Temporary adjustments up until Monday afternoon for inclusion in the current week's payment run.

Time and Attendance System (TACS):

Queries related to policy

What happens if a Learner is sick for 5 days and this results in them losing an allowance?

Answer: There is no change to this process from an ETB perspective. ETBs should refer to the ETB Absence and Sickness Policy.

How are sick leave/USL/AL days going to be accounted for?

Answer: These will be accounted for on TACS by selecting the relevant Reason Code e.g. Uncertified Sick Leave. Allowances payable are dependent on Reason Codes selected. The full list of TACS Reason Codes and Allowances payable can be found here.

Queries related to course details on TACS

Can you clarify the terminology differences between PLSS and TACS in relation to a course/class?

Answer:

- *On the Manage Course's screen on TACS – the Course Description relates to the PLSS Course Description e.g. Leaving Certificate Ordinary Level.*
- *On the Manage Classes screen on TACS – the 'Class' refers to the 'Course' on PLSS. Classes on TACS are instances of Courses on PLSS. E.g. there may be 4 ongoing instances of Leaving Certificate Ordinary Level ongoing within an ETB.*
- *On the Manage Classes screen on TACS – 'Class ID' relates to the PLSS Course Reference Number.*

What are we setting up on TACS, the class or programme?

Answer: Courses are set up on PLSS and Learners are added and put 'On Course'. These courses will be linked to the Classes on TACS. Learner that are 'On Course' on PLSS will transfer to the Class which has been set up on TACS.

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For the setting up of classes on TACS if there are VTOS Learners in a range of dispersed classes, does only one or two VTOS classes need to be set up on TACS based on location or do multiple VTOS classes need to be set up based on the various courses the VTOS Learners are on?

Answer: All classes need to be set up separately as per the Course Reference on PLSS.

Do classes and class schedules need to be set up and adjusted weekly on TACS?

Answer: No, this is a once off task for every new class only.

Queries related to Learner clocking

What happens if a 'Wave 2' programme in an ETB is using an alternative clocking system to TACS?

Answer: All Learners must be input to TACS in order to receive payment from the PeopleXD system.

Can Learners use existing clocking machines for Wave 2?

Answer: Previous communication to all OSD/FET Directors asked that ETBs not invest further in onsite clocking machines given that blended learning is likely to continue in future. There are no plans to interface any existing clocking machines with the new payment system for YR and VTOS Learners.

Will there be clocking for Wave 2?

Answer: The new solution will Go-Live using auto-generated timesheets but there will also be a new web portal which will allow learners to clock via browser, which can be adopted by ETB's post "Go Live" once available.

Queries related to recording time and attendance on TACS

If a learner is feeling unwell and attends the class on line, will there be a way to record their attendance?

Answer: Yes, there is a reason code on TACS called 'Remote Learning'. Select this option if the Learner attends remotely. This will pay basic allowances but travel and meals will not be paid as the Learner is not attending the centre.

If centres need to close for any particular reason, e.g. a storm, will there be a way to record Learner time and attendance?

Answer: Yes, there is a reason code on TACS called 'Class Leave'. Select this option if the centre is closed. This will pay basic allowances but travel and meals will not be paid as the Learner is not attending the centre.

'Arrived Late' does not appear to be a reason code on TACS. What do we do on TACS if a Learner arrives late?

Answer: If a Learner arrives late, use 'In Attendance' as the reason for adjustment and adjust their hours accordingly. You can also add more details to the comments box e.g. Arrived Late.

Does the reason code 'Permitted Time Off' still results in a learner receiving meals and travel?

Answer: Yes, when this reason is selected meals and travel will still be paid as Permitted Time Off could be for only part of a day and therefore the Learner would be entitled to meals and travel allowances.

Do I select the 'Work Experience' reason code on TACS whenever the Learner is on Work Experience?

Answer: No. It is very important to note that the work experience reason code on TACS should only be selected if the learner is due a different travel rate than their usual travel rate while attending work experience. The Learner will also need to be set up on PeopleXD with work experience travel/meals allowances as required. When work experience is selected on TACS, the Learner will be paid the work experience meals/travel rate.

__Please note:__ If attending work experience does not cause the Learners travel rate to change, or result in them receiving a new travel allowance, the reason code work experience should __NOT__ be selected on TACS. The Learner can just remain marked as 'In Attendance'.

How will holiday periods be recorded on TACS?

*Answer: There will be functionality in TACS to enable holiday payments. Timesheets will autogenerate/fully populate each week for all classes. You will be able to toggle between a drop down box and select 'BAU' or 'Class Leave' - When 'Class Leave' is selected the Learner will only receive their basic allowances each week throughout the holiday period (meals and travel will not be paid as the Learner will not be attending the centre). When the holiday period is over, ETB staff will have to select 'BAU' on TACS and begin adjusting hours as normal. **Please note:** The Class Leave dropdown box on the Administering Classes screen on TACS can only be toggled-on on Tuesdays. If this option is selected on Monday it will impact on the previous week's payment run (as all payments are made a week in arrears and ETB staff have up until 6pm to make changes on TACS for the previous week).*

Example: If a class finishes for summer on Friday 29th of April 2022, 'Class Leave' should be selected on the Administering Classes screen on TACS on Tuesday 3rd May 2022. Once this is selected on TACS, the Learners will automatically receive payment each week throughout the summer months, excluding their meals and travel (as they are not attending the centre). They will receive their full basic payments until BAU is re-selected, and the recording of T&A recommences after the holiday period. Similarly, BAU should only be selected on the Tuesday of the first week back to class, as if this is selected on a Monday, the previous weeks' payment run will be impacted.

Will summer hours need to be input each week to TACS?

Answer: No, once 'Class Leave' is selected in the Administer Classes Screen on TACS, the learners timesheets will auto-generate and these hours will be exported weekly to payment throughout the Summer months. No further intervention is needed on TACS by ETB staff when 'Class Leave' is selected. When 'Class Leave' is selected meals and travel allowances will not be paid as the Learner is not attending the centre.

Will Prior Week Adjustments (PWA) on TACS only pay the Learners basic allowances?

Answer: PWA's will pay all DSP allowances, however travel and meals will not be included in the payment of a PWA. This is because if the Learner attended for part of a day and was due backpay for

the rest of the day, they would have already have received their meals and travel allowance for attending part of the day, and would therefore receive an overpayment."

Programme and Learner Support System (PLSS):

Queries related to PLSS and Wave 2 Go-Live

Will Learners who are not entitled to receive an allowance, i.e. those under 16 years of age be migrated to PeopleXD?

Answer: *Any Learner 'On Course' and being paid will be migrated to PeopleXD and TACS. Any Learner 'On Course' and not being paid will be migrated to TACS Only. If a non-migrated Learner or TACS Only Learner subsequently needs to be paid (i.e. they turn 16), the ETB has the ability to schedule a transfer to PeopleXD/TACS using the PLSS transfer dialog.*

What happens if we have a Learner being paid that's not on PLSS?

Answer: *All learners will have to be on PLSS whether or not they are receiving a payment. In order for a learner to be paid they then <u>must be</u> transferred from PLSS to TACS and PeopleXD. The learners should be on PLSS for the ETB that they are being paid or attending the course from.*

What happens if we have a BTEI Learner due a payment?

Answer: *As per the BTEI Operational Guidelines, 'only participants who would be eligible for Youthreach and who may not have an underlying welfare entitlement are eligible to pro-rate or prorata training allowances'. If BTEI Learners fall under this category and are in receipt of an allowance from ETB's, when they move to the PeopleXD payment system they will be treated as a Youthreach Learner for the purposes of payment of this allowance.*

Queries related to PLSS functionality for Wave 2 Learners

When scheduling courses, which 'TACS' option do we select on the PLSS Course Details page?

Answer: *The TACS 'automatic badge numbers' option must be selected on the Course Details page.*

What is the process for ETBs in terminating Learners at the end of their training?

Answer: *The process for terminations remains the same for ETBs. All Learners will be terminated in PLSS and the records are transferred to TACS.*

The ETB user will go into the 'Course Ref', click on 'Learners', then the Learners 'On Course' tab. Select the Learner and you will be given the option at the top to 'Finish on Course'.

Once the learner is finished a file is sent to TACS and PeopleXD (Note: APS load files daily between 9-10am to pick up changes from PLSS).

ETB's have a 1 week timeframe to terminate the class of learners from the course finish date. For example:

•   If a course finishes on Friday 14th January 2022, ETB's have from Friday 14th Jan 2022– Friday 21st Jan 2022 to terminate learners.

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• If a course finishes on Friday 21st January 2022, ETB's have from Friday 21st Jan 2022 – Friday 28thJan 2022 to terminate learners and so on.

This timeframe is shorter for mid-week leavers. For example:

• *If a Learner leaves a course on Wednesday 12th January 2022, ETB's have until Friday 14th Jan 2022 to terminate the Learner.*

• *If a Learner leaves a course on Wednesday 19th January 2022, ETB's have until Friday 21st Jan 2022 to terminate the Learner and so on.*

Failure to do so will result in learners being paid after the course finish date and temporary adjustments being made by ETB's to rectify this.

Will the process for rejoining Learners remain on PLSS?

Answer: *Yes, this process will remain the same on PLSS. Select a current course and refer by PPSN.*

How will Dispersed Learners be transferred from PLSS to TACS/PeopleXD?

Answer: *These Learners need to be flagged as VTOS Dispersed on PLSS and then transferred from PLSS to TACS / PeopleXD for the recording of Time and Attendance and Payment as per all other Learners.*

Queries related to Learner details on PLSS

What does the ETB do in a situation where an email address is missing from a Learner's record?

Answer: *Learner email addresses are required for Learners to access their Payment Details on the PeopleXD Self Service Portal. Therefore, we strongly stress the importance of Learners supplying email addresses in PLSS. Learners will continue to be paid regardless if an email address has been entered on PLSS for them.*

Which number refers to the Learner Unique Registration Number and is it consistent across the systems as the Learner moves from course to course?

Answer: *This is the code (can be up to 9 digits long) associate with the Learners, ending with an 'L' and is consistent across the systems as the Learner moves from course to course.*

How do we coordinate start date for students when their payment dates differ from their course start dates?

Answer: *Start date on course and start date for payment can be maintained as two separate pieces of data and do not have to be in sync – the only restriction is that the Learner transfer start date to TACS/PeopleXD cannot be earlier than the PLSS course start date.*

A Learner can be started 'On Course' and once information is received they can be keyed in on PLSS for Transfer to TACS/PeopleXD.
The learner transfer start date must be in sync with PeopleXD and TACS not with the PLSS Course start

date.

ETB staff can also select 'Transfer to TACS Only' on PLSS if they want T&A recorded and once payment details are received you can go back and transfer to PeopleXD. The PeopleXD system will pay from the point of transfer. If backpay is due, this can be made via a Temporary Adjustment Form. This is in place for Wave 1 already and should be a consistent process across all 16 ETBs and Learner Types.

When Learner's move from Year 1 to Year 2, these learners can be finished on Year 1 and referred to Year 2. For TACS and PeopleXD are there any implications with this and are the learner details saved on these systems?

Answer: When learners are transferring from Year 1 to Year 2, ETB's will need to finish the learner on a Friday for Year 1 and start them on Year 2 the following Monday. If there is any break between the Friday termination and the referral to Year 2 on the Monday, it will have implications for the learners and they will not be paid.

Once a learner is terminated on PLSS, they will also be terminated on TACS and PeopleXD (they will get their week in arrears once hours are input up to the date of termination).

You need to follow the procedure above to ensure that learners who move from Year 1 to Year 2 get paid.

For VTOS learners it has been recommended by PLSS that the Year 1 course end date is extended during the Summer to finish the Friday before the Year 2 Course starts the following Monday.

Queries related to course details on PLSS

How should a Learner's course be managed throughout the summer months?

Answer: Learners need to be active on course on PLSS in order to receive payment. Therefore, until a solution can be found by SOLAS/the Sector, Learners need to remain on PLSS over the summer which can be done by extending their course finish date on PLSS.

PeopleXD

Queries related to policy

Traditionally we have made deductions from Learners for a variety of reasons, i.e. Lockers, books, materials etc. Can we continue with this type of deduction at discretion of ETB/Centre?

Answer: The decisions of the Recommendations Group, which were communicated to the ETB Sector by SOLAS on 13/08/2021, was that ceductions should be made for Meals, Travel and Basic Allowances for absences only (YR Learners). This is to ensure that all learners are treated equally throughout the ETB Sector, regardless of the ETB they are registered with.

In terms of 'Other Deductions'. The communication from SOLAS makes reference to an 'approved initiative'. Can you advise if there is a list of 'approved initiatives' or provide clarification on same?

Answer: The intention was that this facility would be available should a national initiative arise in the future, or if a course curriculum required the Learner to purchase equipment/tool kit etc. essential for their training that they retained at the end of the course. It was not intended as a mechanism for individual ETB's to diverge for the standardised interpretation of the Guidelines, as issued by SOLAS.

We have Centres where meals and travel are provided for learners. In this circumstance the learner is provided with the meal and travel allowance but then this meal and travel allowance is deducted in it's entirety as the learner is provided with a meal at the Centre and a bus to and from the Centre. Can this continue?

Answer: Deductions should be made for Meals, Travel and Basic Allowances for absences only (YR Learners). There is no requirement in guidelines to set up someone with Meals/Travel and then deduct. The Guidelines refers to "Hold" a meal allowance and references that the Learner would give their authorisation – to retain the meals etc. (please refer to section 9.3 of the Youthreach Operator Guidelines 2015). This is consistent with situations in Wave 1 – where meals and travel are not paid – when they are provided directly. Wave 1 Learners in the training centres and community training centres (CTCs) have always had meals retained where they have been provided by the centre.

In line with the above, historically, we have always processed the allowances like this in order to adhere to our ESF Audit requirements and to ensure that there was a clear audit trail of allowances and deductions going through the system?

Answer: The audit trail will not be lost – once the ETB Follows the Guidelines for "holding" meals/travel and secure written approval from Learner. Again, the practice of not paying meals to Wave 1 Learners, where meals are provided, is well established and audited, and treating Wave 2 Learners in the same way will bring consistency to both the Learner and reporting mechanisms.

Queries related to PeopleXD functionality

What are the different levels of access for the PeopleXD Portal?

Answer:

ETB Level 1 Access

To input Bank Details & Allowance details at Registration

To access PeopleXD Insight Reporting

ETB Level 2 Access

To update Bank Details & Allowance details post-Registration e.g. subsequent updates after registration

To access PeopleXD Insight Reporting

How do we distinguish between Apprentice and Learner Paycodes on PeopleXD?

Answer:

Frequently asked questions

*All **Wave 1** Learner pay codes as of 19th January 2022 are listed below for ease of use:*

Pay Code   Pay Code Description

1009   Basic Hours Learner

2010   Full Child Allow Over 12 Learner

2020   Full Child Allowance Under 12 Learner

2030   Adult Dependent Learner

2037   Telephone Support Allowance Learner

2038   Living Alone Allowance Learner

2075   Christmas Bonus Learner

2080   Fuel Allowance Learner

5100   Travel Allowance Learner

5101   Travel Deduction Learner

5102   Work Experience Travel Allowance Learner

5103   Work Experience Travel Deduction Learner

5201   Meals Learner

5202   Meal Deduction Learner

5203   Work Exp. Meal Learner

5204   Work Exp. Meal Deduct Learner

5301   Accommodation Allowance Learner

5302   Accommodation Deduction Learner

5402   Reducing Balance Deductions Learner

5403   Other Deduction Learner

Travel allowance example

5100

5km – 8km	*1*	*€4.60*
8km – 16km	*2*	*€11.90*
16km – 32km	*3*	*€17.60*
32km – 48km	*4*	*€21.60*
48km -64km	*5*	*€27.70*
64km – 80km	*6*	*€32.60*

*All **Wave 2** **Learner** pay codes as of 19th January 2022 are listed below for ease of use:*

Pay Code   Pay Code Description

2009   Basic Hours

Frequently asked questions

2037   Telephone Support Allowance

2038   Living Alone Allowance

2040   Full Child Allowance Over 12

2050   Full Child Allowance Under 12

2060   Adult Dependent

2075   Christmas Bonus

2080   Fuel Allowance

2090   Training Bonus

5100   Travel Allowance

5101   Travel Deduction

5102   Work Experience Travel Allowance Learner

5103   Work Experience Travel Deduction Learner

5201   Meal Allowance

5202   Meal Deduction

5203   Work Exp. Meal Learner

5204   Work Exp. Meal Deduct Learner

5301   Accommodation Allowance

5302   Accommodation Deduction

5402   Reducing Balance Deductions

5403   Other Deduction

Can we search for Learners on PeopleXD by Class Reference?

Answer: You can currently only search for Learners by name or Learner registration number. You can also filter using 'Date Started From' to view all Learners within your ETB who started on a particular date or to run a report on Insight based on the Class ID.

When will Learners appear on PeopleXD and TACS once transferred from PLSS?

Answer: Files transfer overnight, therefore Learners will appear the following day on the various systems

Please note: As Monday 10am – 2pm is the last time that changes can be made to learners in PeopleXD, learners would have to be transferred by Friday evening in accordance with the Learner Payment Calendar.

How will Learner allowances be updated on PeopleXD as a result of, for example, budget changes?

Frequently asked questions

Answer: Scale Point Allowance Rates will be updated automatically on PeopleXD based on the date effective. All Personal Allowance Rates will need to be manually updated by the ETB.

I am inputting Allowances via the Allowance screen on PeopleXD however I have noticed that it states, 'Annual Amount' instead of 'Weekly Amount', is this an error?

Answer: The field 'Annual Amount' is defaulted on PeopleXD for allowances, this is not an error and cannot be changed on the system. The learner will only receive the weekly entitlement.

Allowance Details

Allowance *	Allowance Type
MEALS LEARNER	Scaled

Start Date *	End Date
21-Sep-2020	

Point on Scale *	Annual Amount	Reason	Comments
LEARNER MEALS	148.57		

Please note: When ETBs are entering the basic salary allowance, the new rate is defaulted to Annual (screenshot 1 below) but as soon as a date effective is entered the new rate field automatically updates to weekly (screenshot 2 below).

New Salary

Make effective from *

To be Paid based on *
Scale-Point

New Grade *
Learners

New Point *
Basic Weekly

New Rate is *
Annual

Under the Current Salary Tab, it shows the start date and rate effective date, which one applies to the Basic Allowance (Salary)?

Answer: From the example below: The start date is 21-Sep- 2020 and the rate effective date is 01-Aug-20. The start date 21-Sep-2020 is the date that the salary will commence from.

Note: rate effective date refers to the date that the rate e.g. €45 was set up on PeopleXD system.

When can new Learner Salary and Allowance Information be input to the PeopleXD system?

Answer: Salary and allowance information can be input when the payroll status is highlighted as 'Open for Processing' in a green bubble on the top right-hand side of the screen (see image below). The PeopleXD system should not be used between 2pm on Mondays until the transfer of funds has been issued to ETBs. Please refer to the Learner Payment Calendar for more information.

Payroll Status: Open for Processing

Will the PeopleXD system automatically update a rate when a learner turns 18 or when a child turns 12?

Answer: No, these will need to be updated manually on PeopleXD. However, there are Approaching 16 and Approaching 18 Reports on PLSS. ETB staff can run these reports and they will indicate Learners turning 16 or 18 in the coming 3 weeks. Allowances are not updated automatically on PeopleXD when a Learner changes age. However, ETB staff can enter future allowances on PeopleXD, which comes into effect once the date of the future allowance is reached on the system.

If a rate increases midweek e.g. a learner turns 18 on a Wednesday and their rate increases from €45 to €203, will PeopleXD automatically calculate the correct weekly entitlement?

Answer: No, PeopleXD will calculate the rate that is live in the system on a Friday, in the example above that would be €203. ETB's will have to calculate and do a temporary adjustment for the correct amount the learner is entitled to for that week only.

Queries related to Learner details/allowances on PeopleXD

Will ETBs need to input allowances into both PLSS and PeopleXD systems?

Answer: No, allowances and bank account details will only need to be input to the PeopleXD system.

How do Learners access their payment details on the PeopleXD Portal?

Answer: ESBS have provided ETBs with a 'PeopleXD Payee User Guide' which details how Learners can access their Payment Details on the PeopleXD Portal. This document is saved on Sharepoint here and can be downloaded and shared with Learners. Learners will be emailed a link to access the PeopleXD portal once they are transferred to PeopleXD. It is the same process and set up used for Wave 1 Learners and Apprentices.

The Learners username is their email address entered into PLSS and their password is the last 4 digits of the IBAN entered into PeopleXD.

If we know a birthday is coming up, can we key in a date in the future on PeopleXD? If so, will this take effect, or will we have to run a report and wait until the time comes to update?

Answer: *Yes, you can enter future dates for Allowances into PeopleXD system. Paycodes in TACS only work from the effective date onwards i.e. if an ETB adds an allowance with a future start date (e.g. 2 weeks' time) TACS will ignore this until that time is applicable and only at that time will hours be sent across.*

There is a Learner Age Report by Course/Provider on PLSS that also indicates a learner's birthday and ETB's can use this to flag when a learner turns 18.

Can a Learner be paid meals/travel/digs only, with no basic training allowance?

Answer: Yes, if Learners are due to be paid Meals/Travel/Digs/Fuel and no basic allowance, ETB's will transfer these learners from PLSS to TACS and PeopleXD, the basic allowance will be zero and the learners will then be assigned an allowance rate for Meals/Travel/Digs/Fuel accordingly by Course Admin directly in the PeopleXD system.

If a learner was not entitled to travel do you select to add this allowance and use the drop-down menu for 0-5kms which is €0.00 or do ETB's not select any allowance?

Answer: If a Learner is not entitled to a travel allowance, you don't assign it to the Learner, only assign the payments the Learner is due to receive.

The DSP have incorrectly completed the F103 Form which will impact the information keyed into PeopleXD. What should we do in this scenario?

Answer: ETBs should carry out the same process as before, which is to refer the Learner back to DSP to complete the F103 correctly. It is important that the F103 is completed correctly given every allowance is keyed in separately to PeopleXD.

How will Christmas Bonus calculations be managed through PeopleXD?

Answer: A Christmas Bonus report is available as a guide to help ETBs determine eligibility based on DSP criteria. All eligible Learners will be entered on a once off external timesheet take on file at the start of December to process payment. The Operations Team in ESBS will communicate to each ETB on this process.

If there is a Learner who is on Disability allowance so receives only travel and meals - do we need to make manual adjustments each week for the basic or can their basic be set to zero?

Answer: A learner who is not in receipt of a Basic Allowance, or DSP retain the payment, can be transferred to TACS and PeopleXD. No Salary (Basic Allowance) would be entered on PeopleXD for these learners. Meal and travel allowance should be entered on PeopleXD and learners will be paid these allowances weekly based on their attendance.

The F103 only covers the JA Days continuous payment - however time spent on either CE Scheme or prior ETB Training Time could add to their days entitlement to Christmas Bonus. How can this be handled?

Answer: A letter/proof will be required from previous schemes and this can then be added to the number of days on F103 and entered in the UDF field on People XD for Christmas Bonus purposes.

Queries related to Insight Reports on PeopleXD

When you run the Christmas Bonus Report on PeopleXD, the report gives you a start date and date that the allowance started (these dates are not always the same) but the number of days on the report is from the start date and not the date the allowance is effective from. Meaning the centers have to double check all the days.

Answer: The learner is entitled to the Training Days from the start date of the course. If for some reason there is a delay with paperwork and the allowance is not payable until a later date, the learner would still be entitled to the days since they started the course.

Queries related to Learner bank details

What does the ETB do in a situation where bank account details are missing from a Learner's record?

Answer: Bank details are to be input on the PeopleXD system to facilitate payment to Learners. BIC and IBAN fields are mandatory for a Learner to be paid.

We now have to input the bank details on PeopleXD, is there an inbuilt IBAN checker in this system?

Answer: There is no IBAN checker on PeopleXD – PeopleXD will validate the length of the IBAN and validate that the BIC exists in PeopleXD as reference data. If the ETB user enters incorrect details the payment will be processed, and the bank will come back with the rejection.

Please note BIC and IBAN formats can also be checked and validated on the Banking and Payments Federation Ireland website if required https://apps.applyfinancial.co.uk/validateirish/bpfi/.

Can a user in an ETB enter allowance details on PeopleXD if no Learner bank account details are available?

Answer: Yes, a user can enter and save allowance details on PeopleXD even if no bank details are available. However, a Learner will not get paid unless valid BIC and IBAN details are entered to the PeopleXD system.

Please note: No Bank Details and No Pay Reports are useful reports included in the Report Verification Checklist.

Do previous bank details stay with the Learner record on PeopleXD when they re-join/restart?

Answer: Yes, these details remain on PeopleXD. However, bank details for re-joiners should be verified again by ETBs/Learners to ensure that the details haven't changed.

Access Payroll Services

Queries related to the Learner Payment Calendar

What happens if an ETB fails to meet the Learner Payment Calendar deadline?

Answer: *It is the responsibility of each ETB to meet the payment cut-off deadlines set out in the Learner Payment Calendar to ensure that their Learners get paid.*

Queries related to the Temporary/Permanent Adjustment Forms

What adjustments can be made using the PeopleXD Temporary Adjustment Form?

Answer: *Please refer to the Notes contained in both the Temporary Adjustment and Permanent Deduction PeopleXD Forms. ETBs are to upload the relevant completed PeopleXD Adjustment Forms to their SFTP folder for the APS team to process accordingly.*

Queries related to the checking of payment reports on a weekly basis

Will all Learners appear on the same payment report for checking purposes?

Answer: *All Wave 2 Learners, Youthreach Learners and VTOS Learners will appear on the same payment reports for checking. These reports can be filtered by Learner type.*

Banking

Bounce back payments - If a bank account of a Learner is closed or incorrect and the payment bounces back into the ESBS Bank Account (Danske) how quick will the ETBs be notified that this has happened?

Answer: *This depends on how quickly the payment has bounced back into the ESBS (Danske Bank) Account. Any payment that bounces tends to come back to the ESBS Bank Account on the next working day after payment. ESBS monitors the Bank Account daily and will notify the ETB once a bounce-back occurs and will process the payment return to the ETB within the next working day after it arrives in the ESBS Bank Account.*

I understand that ESBS will refund the bounced back payments to the ETBs and it will be up to each ETB to process the re-direct by 3rd party payment. Can you please confirm the process?

Answer: *ESBS monitors the Bank Account daily. Once we receive a bounce-back (which will be a Nett Amount i.e. we only process nett payments to staff/Learners) we will investigate to determine which person (and therefore which ETB) the bounce-back relates to. Once this has been established, the ESBS will notify the ETB that a bounce-back has occurred and we will aim to process the payment return to the ETB within the next working day after it arrives in the ESBS Bank Account. It will be a matter for the ETB to discuss the matter with the individual and then make a payment directly to the individual of the Nett amount due. This will ensure that all of their payment details and cumulative amounts paid etc. will remain correct on PeopleXD records. The person's bank account details will also need to be updated by the ETB in advance of the next payrun to prevent a re-occurrence.*

Financial Management System

How should non payroll refunds be managed?

Answer: *Non Payroll Refunds (e.g. Class Materials, Tool Kits) should not be considered part of a payroll/payment system and will not be issued through the PeopleXD system once learners transfer. If*

a learner is due a non-payroll refund, these should be treated as a reimbursement to the learner and processed through the respective Creditors section within the ETB's Finance system.

In line with Wave 2, can the GL interface for Wave 1 Learners interface with Sun instead of SAP?

Answer: *This is not currently in scope for the Wave 2 Project given there is development work required for PLSS as the GL mapping comes from PLSS and therefore PLSS would require enhancements. This will be investigated further post Go-Live.*