ICARE Version 1.90

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Contents

1 Company details

1.1 What are the company details used for?

The company details in Icare are used to record your RTO details and the list of employers.

1.2 Where do i find the company details?

The list of companys can be shown by clicking the *Company* → *List* menu.

The *Company List* window lists your RTO details on the first line then the remaining companies in alphabetical order. Your RTO details are listed on the first line in **bold** so that you can easily find it to adjust delivery locations and assessors.

To display the details of any company listed, double click the entry in the list, this will load the *Company* window with the details of the selected company.

1.3 How do i add a new Company?

You can begin adding a new Company record in one of two ways. The first way to add a new Company is to click the *Insert Company* button at the bottom of the *Company List* window. When clicked the *Insert Company* button with bring up the *Company* window and put it into *Add* mode ready for you to enter the details.

The alternative way of adding a new Company is usefull for when you are adding a series of companies and have already got the *Company* window visible. Clicking the *Add* button on the *Company* window will clear the window and put it into *Add* mode ready for you to enter the details.

1.3.1 What do i put there?

Identifier The primary purpose of the identifier is to record your RTO number. When entering your RTO number please pad it out to ten digits, for example `0000020456`.

For any other company the identifier can anything as long as it is not the same as any other company identifier. To help you, Icare will make up an identifier for you. If you wish to use some other identifier then simply type over the supplied suggestion.

RTO The *RTO* checkbox only needs to be ticked for one your RTO record. When ticked it enables the extra fields required by the *Avetmiss* specification.

Used in Training Contact(s) You only need to tick this box if you make use of the depreciated *Training Contact* window.

Type When entering your RTO details you need to select an item from this list that best describes your RTO. When unsure us the option `16` *Industry Organisation*.

Contact Enter here the name of the person who should be contacted from the State Government in regards to submitted *Avetmiss* details.

1.3.2 What next?

Each company needs to have at least one location. To help you, Icare will add the first location using the company details you have just entered. You can modify this first location by double clicking the location listed below the company details.

Additional location records can be added by pressing the *Insert Location* button.

1.4 How do i add a new Company Location?

To add a location to an existing company, first find the company's details (See section 1.2), then click the *Insert Location* button at the bottom of the *Company* window. Alternativelly, you can click the *Add* button on the *Company Location* window, this new Location will be placed in the same Company as the previous Location.

1.4.1 What do i put there?

Identifier The only requirement for location identifiers is that it is not the same as any other location identifier. To help you, Icare will make up an identifier for you. If you wish to use some other identifier then simply type over the supplied suggestion.

1.5 How do i add a new Company Contact?

To add a contact to an existing location, first find the location details, then click the *Insert Contact* button at the bottom of the *Location* window. Alternativelly, you can click the *Add* button on the *Company Contact* window.

2 Assessor details

Assessors are used in Icare when when you enter results.

In addition to listing the names of each assessor, Icare also records what courses that assessor can assess. This allows Icare to give you a shorter selection list when entering results for a specific Course rather than listing all assessors in the system.

2.1 How do i add a new Assessor?

Assessors are entered into Icare as Company Contacts with the additional list of Courses they can assess attached to the contact record. See Section 1.5 on how to add a new Company Contact.

Once you have entered the assessor's name into the *Company Contact* window you can attach those Courses the assessor can assess. To do this click the *Insert Course* button at the bottom of the *Company Contact* window.

3 Institute Editor

An *Institute* in Icare is a container for the definition on Courses and Modules. Icare can have multiple Institutes defined but it is recommended to only have one.

The *Institute Editor* is used to setup your list of Courses and Modules. You get to the Institute Editor by clicking on the top right hand button of the *Toolbar* (this button is commonly called the *Hat*). When the Institute Editor window loads it will list the Institutes defined on your system. To see the course/modules within the Institute click the view button or double click the Institute name.

If you are entering details from a Training Package you will find the *Wizards* usefull in reducing the amount of data entry required. All other types of Courses and Modules , or entries not found in the Wizards, can still be entered into Icare manually.

3.1 Module or Unit of Competency?

Icare treats Modules and Units of Competency the same, and always refers to them as Modules. A Unit of Competency is just a specific type of Module that is defined within a Training Package.

When a Module is entered into Icare an option is selected to indicate whether the Module is a Unit of Competency from a Training Package or simply a Module.

3.2 How do i add a new Course?

To setup a new course there are three main steps.

1. Enter the course details,
2. Enter the details of each module,
3. Attach the module to the course.

The module details are initially entered independantly of the course details. This is done so that you can take advantage of the occasions when a module is used it more that one course; Enter the module once and then attach it to multiple courses.

If the course is from a Training Package then you can use the *Wizards* for steps 1 and 2.

To enter the course details, either use the *Qualification Wizard* (See section 3.4) or enter the details manually (See section 3.5).

To enter the details for each module, either use the *Unit of Competency Wizard* (See section 3.6) or enter the details manually (See section 3.7). If a Module already exists in the system (it might already be used in another course) then you do not need to enter the details again, but simply select it from the Module list while performing step 3.

When the modules have been added you can attach them to the course (See section 3.8). If you wish, you can attach each module as you enter it instead of waiting until all modules have been added.

3.3 How do i add a extra Modules to a Course?

Modules are not entered directly into a course, they are first independantly entered into the general Module list then attached to any course they are part of.

If a Module already exists in the system (it might already be used in another course) then you do not need to enter the module detail, it just needs to be attached to the course.

To enter the details of a new module, either use the *Unit of Competency Wizard* (See section 3.6) or enter the details manually (See section 3.7).

Section 3.8 explains how to attach modules to a course.

3.4 How do i use the Qualification Wizard?

The Qualification Wizard is used to enter the details of a course that is part of a Training Package. It is a simple as searching for the course and then filling in nominal hours.

You will find the Qualification Wizard by pressing the *Wizard Menu* button at the bottom of the Course/Module list in the Institute Editor. Pressing the button will show a drop down menu from which you can select Qualification Wizard.

3.4.1 Searching for the Qualification

The first step in the Qualification Wizard is to search for the course. Fill in the information you wish to search with and then press the *Search* button. You do not need to type the in complete qualification name and identifier when searching, for example you can search for a single word or just the first three letters of the identifier.

HINT: Try searching for just the first three letters of the qualification code. For example, to find "Certificate I in Food Processing", enter just `FDF` in the identifier box. The search will list all courses in the FDF training package.

HINT: If you do need to search by the qualification name, fill in only key words. For example, to find "Certificate I in Food Processing", enter just `Food` into the name box. The search will list all courses with the word *Food* in its title.

3.4.2 Creating the Qualification

Once you have found the Qualification you wish to use, highlight it and click the *Next* button.

Icare will ask you whether the Qualification should be included in Avetmiss exports, you will typically click the *Ok* button to go with default *Yes* option.

3.4.3 Fill in the blanks

To complete the process you will need to enter any details that the wizard cannot supply. The *Nominal Hours* will always need to be entered, but you may have to enter the *Field of Education* and *ASCO* classifications for some qualifications.

After all blank fields have been filled in you can click the *Finish* button and the Qualification will be created.

3.5 How do i add a my own Course details?

You are not limited to using only courses that Icare knows about in its wizards. If you cannot find a course in the *Qualification Wizard* or you want to enter an RTO specific course then you can enter the course details manually. To do this, click the *Add* button on the *Institute* window in the *Institute Editor* (make sure you are on the *Courses* tab first).

3.6 How do i use the Unit of Competency Wizard?

The Unit of Competency Wizard is used to enter the details of a unit that is part of a Training Package. It is a simple as searching for the unit and then filling in nominal hours.

You will find the Unit of Competency Wizard by pressing the *Wizard Menu* button at the bottom of the Course/Module list in the Institute Editor. Pressing the button will show a drop down menu from which you can select Unit of Competency Wizard.

3.6.1 Searching for the Units

The first step in the Unit of Competency Wizard is to search for one or more units. Fill in the information you wish to search with and then press the *Search* button. You do not need to type in the complete unit name and identifier when searching, for example you can search for a single word or just the first couple of letters in the identifier.

The Unit of Competency Wizard can be used to create more that one unit at at time. Do a general search and then select one or more units. For example, searching for `BSBCMN` in the unit identifier will list the common business units of which you can select one or more units.

3.6.2 Creating the Units

Once you have highlighted the units you wish to create, click the *Next* button.

Icare will ask you whether the Units should be included in Avetmiss exports, you will typically click the *Ok* button to go with default *Yes* option.

3.6.3 Fill in the blanks

To complete the process you will need to enter any details that the wizard cannot supply. For each unit selected you will need to enter the *Nominal Hours* and some enrolment defaults.

If you are have selected multiple units Icare will give you the choice of only entering the *Nominal Hours* for the remaining units. Answering *Yes* will save you time when all units are going to have the same default delivery, funding etc...

3.6.4 What do i put there?

Most of the information you will need to give for each unit are defaults. These defaults can be changed per Trainee when you enrol them.

Nominal Hours (Unsupervised) In the majority of cases you can enter in zero hours. If you have the time and inclination to work out how many hours to enter, go ahead. A warning thought, when enrolling a Trainee in a module Icare will fill in the default *Scheduled Hours* from only the *supervised* hours.

Default Funding I would suggest you put in *Fee for Service* (FFS)as the default funding. Even if the majority of training is funded, FFS is the safer option for when you forget to change the funding source for a trainee to the correct code.

3.7 How do i add a my own Module details?

You are not limited to using only the units that Icare knows about in its Unit of Competency Wizard. If you cannot find a unit in the wizard or you want to enter an older corriculum style module then you can enter the module details manually. To do this, click the *Add* button on the *Institute* window in the *Institute Editor* (make sure you are on the *Modules* tab first).

3.8 How do i attach a Module to a Course?

Each course contains a list of modules that can be used when a Trainee enrols in the course. The list will include core units as well as any elective or specialist units. There is no requirement that a Trainee must do all units listed within the course.

The modules listed within a course are setup on the *Attachments* tab of the *Course* details screen.

Additional modules are included by pressing the *Attach Module* button. You can then select one or more modules from the global list of modules in the system.

4 Report Wizard

4.1 What is the Report Wizard?

The Report Wizard is where you can print, preview and edit reports. These reports are designed in a word processor giving you the full formatting flexibility of Word. Information from Icare is placed into the report by inserting special objects into the document.

4.2 What is each report?

Each report listed in the Report Wizard window is a file found in the `icare\report\master` folder. The files are Rich Text Format files with `.rtf` at the end of the file name. Note some systems will hide the `.rtf` when browsing for files. The important thing to remember is that when reports are saved you make sure the *File Type* dropdown box on the *Save As* window has *Rich Text Format* selected.

When the Report Wizard looks for `.rtf` files in the `icare\report\master` folder it cannot understand long file names, it can only see the first eight letters in the file name. If you have saved files with long file names or names with spaces then the Report Wizard will display it with a shortened name, this name will probably include the \~ character and digits.

It is suggested that you save all reports with short names (eight letters or fewer) and number them. For example Omniscient Australia might name their reports `omni001`, `omni002`, etc ...

To make up for the lack of naming ability, each report can be given a long description. This description is saved in the *Comments* section of the *File* → *Properties* menu of your word processor. Alternatively you can modify the description of each report by pressing the *Description* button below the list of reports.

Icare fields are inserted into to the document wherever you want information from Icare to be shown.

Lists of information can be generated by inserting a table into the report.

4.3 How to create a new report in Report Wizard

New reports can be created in a couple of different ways. In preference a report can be created by:

- Makeing a copy of an existing sample report and then adjust the structure and formating.

  In this way you get the advantage of Icare fields being already setup.

- If you have existing letters or certificates these can be easily converted to a report by saving it into the `icare\report\master` folder, then you only need to insert Icare fields where you want information from Icare to be shown.

  You may still find it useful to open a sample report and cut and paste fields (or tables) from the sample report.

- Start with a blank word document.

  You will need to understand the workings of the Report Wizard in much more detail if you do this.

  If you think you need to start from scratch because you cannot find a sample report to start with, then please email or call Omniscient Australia we can find or prepare a new sample and email it to you.

4.4 What sample reports are available?

The following sample reports can be downloaded from the Omniscient website:

Letter to Trainee (Download from plain033.rtf)

This is a very bare letter addressed to the Trainee. It is a good source to cut and paste fields from.

If the Trainee is enrolled in more than one course you could list those courses in this letter. Compare this with the next sample letter that refers to one specific course enrolment.

Letter to Trainee re: Course Enrolment (Download from plain034.rtf)

Very similar to the *Letter to Trainee* report on the surface. BUT, if the Trainee is enrolled in more that one course, this letter will only refer to one specific enrolment.

Please see section **??** for the hidden difference between this report and the *Letter to Trainee* report.

Letter to Trainee's Employer (Download from plain035.rtf)

This is the same as the *Letter to Trainee* but addressed to the Trainee's Employer.

4.5 How to create a letter?

Step 1 Which sample and/or category to use? When creating a new letter, the first question you must ask is: *Is the letter about a course enrolment?*

If the letter is about a course enrolment and the Trainee is enrolled in more than one course, then when you print the letter Icare needs to know (and possibly as for) which enrolment do you want to print. Use the sample report *plain034* and make sure that all fields are from the `Enrolled.Course` category.

Otherwise, use the sample report *plain033* or *plain035* and make sure that all fields are from the `Trainee` category.

Step 2 Save a copy of the sample report.

In the Report Wizard, highlight the sample report and click the Edit button. The sample report will be loaded into your word processor.

Choose save as and save the report into the `icare\report\master` folder (or sub-folder). Remember to only give the file a short name and make sure the File Type is Rich Text Format.

Step 3 Write the letter.

At this point you can write the letter in the normal way.

Step 3a Adding extra fields to the report.

The easiest way to add extra fields to the report is to copy and paste an existing field. For example if you copy and paste the `Trainee.Surname` field you will have two surname fields. If you want a field other than the Trainee's surname then double click on the new field. A window will popup letting you choose another field.

Step 3b What about extra fields in the Module table?

If you are writing a letter that lists enrolled modules then you will have a table in the report that contains Module fields such as `Module.Name` and `Module.Identifier`.

Extra columns can be added and columns removed from this table. To add a column , use your word processors *Insert Column* command , fill in the column's heading and then copy and paste one of the existing Module fields and double click it to adjust the field.

WARNING: The fields in the Module table cannot be mixed up with the fields outside the table.

Step 4 Test the report.

To check that your report works and looks as you expect, close document in your word processor and preview the report in the Report Wizard.

Step 5 Link the report into the Heart.

Running a report in the Report Wizard means you have closed the Heart and any Trainee screens you had open and then the Report Wizard askes you to re-select the Trainee to be printed.

You can run reports directly from within the Heart without having to close any screens and the report will not ask which Trainee to print, it will print the Trainee you have already got displayed on the screen.

See section 4.6 for details on how to do this.

4.6 Adding a Report Wizard report into the Print and Preview menus of the Heart?

Reports in the Report Wizard can be run directly from the Heart, find a Trainee, bring up their

Step 1 Find and highlight the report in the Report Wizard.

Step 2 Click on the Association → Assign this Template to Report (slot) menu.

Step 3 Select which menu you would like the report to be in.

Each screen in the Heart has its own list of reports. When you are looking at the Trainee details, the Print and Preview menus list reports related to the current Trainee. Reports that are about course enrolments are in the menus when you are looking at the Course Results or Enrolled Courses screens.

You need to select what type of report you are adding to the Heart. If the report is about a course enrolment then double click the *Course Enrolment* item. If the report is about a trainee then double click the *Trainee* item.

Step 4 Select which slot you would like the report to be in.

Each menu has 20 slots (or possitions) you can fill up with reports. You can select an empty slot or replace an existing report.

Step 5 Name the report.

5 Avetmiss

When Icare exports statistical data to be sent to the State Governments it uses the Avetmiss standard. The Avetmiss standard defines what information gets exported from Icare and how that information is presented. Avetmiss is a national standard but each State can and do have their own specific variations.

5.1 How do I create the Avetmiss export files?

The *Avetmiss Export* screen is obtained by clicking on the Avetmiss Export button of the Icare Toolbar (4th from top on the right hand side) The icon is the Avetmiss logo, like a blue edged ribbon in the shape of Australia.

The Avemtmiss Export screen has many options, but most of the time you will only need to check and/or change the following items:

- Please confirm that the *Training Organisation Identifier* is correct. Icare loads this identifier from the *Company - Our Details* record (See section 1).
- You should select the *State* that you are submitting the data to. This selection affects two things, firstly it tells Icare to use that state's specific variation on the national Avetmiss standard. Secondly only trainees that have been enrolled into that State will be exported.
- The *Collection Period* specifies the range of dates that will be used when exporting module enrolments. Only enrolments that overlap the collection period will be exported.

  Enrolments do not have to be entirelly within the collection period. For example, modules with a start date before the collection start date will still be exported if the end date is within or after the collection period. Similarly, an enrolment with an end date after the collection period will be reported if the start date is within or before the collection period.

  Nominally the *Collection Period* is a complete calendar year. But for states that report periodically through out the year you would select a collection period of January through to the month just ended.

5.2 Avetmiss in Victoria

Starting in 2005, Avetmiss exports are required quarterly. The only change required when exporting is to select the correct collection period.

Icare used to always do a complete calendar year, i.e. the 1^{st} of January through to 31^{st} of December of the year selected. Now you will select the *year* and *month*, for the first quarter you will select 2005 and *March* and Icare will use a reporting period of 1^{st} of January through to 31^{st} of March 2005.

5.3 Avetmiss in New South Wales

DET NSW's new online ePayments system, due to be available from March 2005, is based on the national Avetmiss standard unlike its predecessor that had a NSW specific data format.

The *Avetmiss Export* screen will replace the *DET 2000* add-on that was previously used to make claims for payment. The new ePayments system will make claiming for NSW similar to running Avetmiss exports for other states, *but* there are some quite big variations from the national standard that you need to be aware of.

- All modules on a trainee's training plan must be enrolled and have start and end dates whether they be proposed dates or actual dates.
- Enrolments with NO actual dates will be reported. These enrolments represent planned enrolments where no trainin activity has yet begun and are not report under the national Avetmiss standard.
- The Collection Period is ignored, any modules completed for a trainee in the previous year will still be reported.
- The Avetmiss export will typically only include those trainees that you wish to make a claim for. Therefore Icare will prompt you for a *Training Contract* and allow you to select one or more trainees from that contract.

  This method of selecting trainees may change in the future as the new ePayments system allows you to make a single claim including trainees from different contracts.
- The status of training (commenced, halfway, completed) and which claim you wish to make (initial, halfway, final) is no longer reported by Icare (although the fields so far remain on the DET NSW enrolment screen). The status and which claim is calculated by DET NSW based on the enrolment data submitted in the claim.

Maintanence of *Training Contracts* will remain in the *DET 2000* add-on until a suitable replacement screen has been prepared. At that time the *DET 2000* add-on will no longer be needed and will be removed.