



User Guide for TAGSO Administrators

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Introduction

Welcome to the quick start guide to Training Agreement Online System (TAGSO). This guide is for administrators to understand how to use the TAGSO system.

TAGSO allows companies to pay for training scheme via direct debit, to track the status of their trainees' training agreement applications, and view quick data reports on active, completed, cancelled and transferred trainees and SCEs.

We have set up a demo online administration area (known as the TAGSO dashboard) that reflects the live site for the fictitious company **ABC Construction** to help TAGSO administrators familiarise themselves with the system.

Accessing your TAGSO Dashboard

As TAGSO administrator you can access your TAGSO dashboard using the URL:

<https://ext.ice.org.uk/TAGSOExtranet/TAGSOExtranetLogin.aspx>.

Each company that signs up to use TAGSO will nominate one TAGSO administrator who will be solely responsible for accepting trainees. The TAGSO administrator may be a Training Scheme Administrator, lead SCE or someone involved in the processing of training scheme applications.

ICE sends a username and PIN number to the nominated TAGSO administrator when a company is registered as an ICE approved employer.

A TAGSO administrator can choose to pass these details onto other administrators within the company. The nominated TAGSO administrator should be aware that these login details will enable them to accept trainees onto the system and prompt payment to be taken by direct debit. The details should not be passed onto another employee of the organisation without recognition that any actions they take are the company administrator's responsibility.

TAGSO administrators are asked to contact cats@ice.org.uk if they are moving on from the company. They will need to nominate another TAGSO administrator who will be required to fill in a [Change of Administrator Form](#) and will become the main contact for the scheme.

If a trainee contacts cats@ice.org.uk and requests to know why they cannot access IPD online, the TAGSO administrator's email will be given as a contact if they still need to be accepted on the training agreement.

Your trainees signing up via TAGSO

As a TAGSO enabled company, trainees should register for a training agreement online via https://myice.ice.org.uk/tagso_tagsostart. They can either apply for their training agreement at the same time as their ICE graduate membership or they can apply for their training agreement separately.

The moment a trainee applies and so long as they have submitted all of the required documentation, the system will email the nominated TAGSO administrator requesting they log into the TAGSO dashboard to accept or reject the trainee's application.

Who to contact

If you need help with TAGSO please contact cats@ice.org.uk

If your company approved training scheme is coming to an end please contact your local Membership Development Officer. You can find who this is [here](#).

Accessing the ICE Scheme Administration Area

The following sections show you what a TAGSO administrator is able to see and how you can use the TAGSO dashboard in the day-to-day administration of the scheme.

Homepage

Once you have logged in, you will see this homepage:

The screenshot shows the ICE Scheme Administration Area homepage. At the top, it says "ICE Training Scheme / ICE Scheme Administration Area". Below this is a navigation bar with tabs: Home, Pending Trainees, Active Trainees, Closed Trainees, SCEs, and Payments. A callout box points to the navigation bar, stating "Your company name & logo are shown here". To the right of the navigation bar is the ICE logo (Institution of Civil Engineers) and a Logout button. A callout box points to the Logout button, stating "The logout button appears on all pages". Below the navigation bar, there is a "Welcome Miss Harry Potter..." message. Below this is a section for "Useful info..." with links for "Annual Appraisal & Training Review Completion Certificate" and "SCE Application Form". A callout box points to this section, stating "The useful info.. section is updated periodically". To the right of the "Useful info..." section is a "Quick Glance Stats..." table. A callout box points to this table, stating "Quick Glance Stats..." show a few details of your scheme. You can click through to see further details. Alternatively you can also use the tabs at the top of the screen. Below the "Useful info..." section is a text box explaining that users can choose to receive notification via email of any new trainees awaiting their acceptance here. This will email the TAGSO administrator every time a trainee's application is ready to be accepted. We recommend keeping this ticked so you know when new trainees sign up and are awaiting your approval.

| | |
|---|----|
| Trainees are awaiting your acceptance: | 0 |
| Active trainees on your scheme: | 22 |
| Completed / cancelled / transferred trainees: | 17 |
| SCEs working at your company: | 8 |

Pending Trainees tab

This tab is split into two sections;

- Trainees awaiting your acceptance
- Trainees awaiting completion of graduate membership application

Trainees awaiting your acceptance

Trainees who have completed their ICE graduate membership application and are ready to be accepted on the company's training scheme.

| Trainee ID | Trainee Name | Grade | Grade Status | Registered Site | SCE | App Date | TA Start Date | Acceptance |
|------------|--------------|------------|--------------|-----------------|------------|------------|---------------|--|
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | 27/03/2008 | 12/01/2008 | <input type="radio"/> Accept <input type="radio"/> Reject <input checked="" type="radio"/> Leave |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | 26/03/2008 | 06/03/2008 | <input type="radio"/> Accept <input type="radio"/> Reject <input checked="" type="radio"/> Leave |

(Export)(Print)

These options will allow you to export and/or print this page if required by clicking on the relevant link.

Accept All

This button will 'Accept' all the trainees with the 'Accept' status assigned. Please note that 'accepting' a trainee on TAGSO triggers an automatic direct debit payment of the training agreement fee for that trainee from your company to ICE.

Reject All

This button will 'Reject' all the trainees with the 'Reject' status assigned

Leave All

This button will 'Leave' all the trainees with the 'Leave' status assigned (this is for trainees who are on the company training scheme but for various reasons should be applying through paper submission instead of applying online (please see below 'QUEST Scholars' for more information).

Submit

Click Submit to action the acceptance or rejection of the trainee(s). By clicking on the Submit button, the nominated administrator agrees the following:

- To prompt payment by direct debit to be taken (allowing at least a full calendar month between acceptance and payment).
- That the SCE assigned to that trainee has agreed to mentor that trainee through the course of their agreement (unless they resign from their duty as an SCE or leave the organisation)
- To initiate that trainee's registration on the ICE training agreement

Transfers of training agreements

Trainees who were previously on a training agreement with another company can transfer to your scheme via TAGSO.

Transfers can be accepted the same way as explained above; however no payment is required for transfers – the system automatically exempts them from payment as it recognises that they are transferring from another company. They will not show on the payment tab.

If a trainee has already completed a training agreement and achieved a professional qualification (for example IEng) and is now looking to take the progressive route to CEng (or another level), they should apply via the paper [Training Agreement Application Form](#), because TAGSO will not allow them to apply. Please send the form to cats@ice.org.uk and they will be manually registered onto the company training scheme. If the trainee did not complete their previous IPD via a training agreement, payment will be required to set them up on the new scheme. The ICE will be able to manually register them so that payment can be taken by direct debit with the TAGSO administrator's permission.

If a trainee is transferring from the Mentor Supported Training scheme, we will require the training agreement fee payment to be paid via another route (unless they have already paid their Mentor Support Training fees). As TAGSO does not take the fees for transferred trainees automatically, the company will have to use a different payment method. Please contact cats@ice.org.uk or call our subscriptions team on +44 (0)207 665 2227.

QUEST Scholars

These should not be “accepted” on to the scheme using TAGSO. If a QUEST scholar applies via TAGSO they should be set to “leave”. QUEST scholars should fill in our paper [Training Agreement Application form](#) and send it to cats@ice.org.uk, and we will register them manually and free of charge.

Trainees awaiting completion of graduate membership application

This section shows applicants who have also indicated their interest in signing up for a training agreement, but who have not yet been accepted as graduate/student members of ICE. You will not be able to accept these trainees onto your scheme until they have completed their graduate/student application.

| Trainees awaiting completion of graduate membership application: | | | | | | | | {EXPORT} | {PRINT} |
|--|-------|--------------|-----------------|-----|------------|---------------|------------------------|----------|---------|
| Trainee Name | Grade | Grade Status | Registered Site | SCE | App Date | TA Start Date | Reason for Delay | | |
| | | | | | 18/12/2007 | 01/12/2007 | Payment | | |
| | | | | | 22/05/2008 | 01/03/2008 | Degree Proof | | |
| | | | | | 08/07/2008 | 30/06/2008 | Degree Proof | | |
| | | | | | 12/12/2007 | 12/12/2007 | Degree Proof + Payment | | |
| | | | | | 12/12/2007 | 12/12/2007 | AQP: 14/04/2008 | | |

Reason for Delay

This shows the reason for the delay of the graduate application. The ICE will continue to chase for items for one month to obtain missing information. If not provided within one month ICE will discontinue their application. As part of this process they will be automatically moved to the **Closed Trainees** tab and their Training Agreement status will show as **Cancelled** and highlighted in **red**.

Possible Reasons for Delay:

- **Payment** - ICE has not yet received payment from the applicant for their Graduate membership
- **Degree Proof** - ICE is either awaiting or has not yet validated the applicant's proof of academic qualification.

- **Degree Proof & Payment** - ICE has not yet received payment for Graduate membership and is also awaiting, or has not yet validated the applicant's proof of academic qualification.
- **AQP: <date>** - ICE needs to assess the applicant's academic qualification before it can confirm that it is suitable for graduate membership of ICE. The date shown is the date of the next AQP (Academic Qualifications Panel) meeting. It may take a couple of weeks following this date for the graduate membership to be updated in line with the decision reached by the AQP.

Once ICE receive and validate this missing information, the trainee will move automatically up to the "trainees awaiting your acceptance" section, ready for the TAGSO administrator to accept.

(Export)(Print)

These options will allow you to export and/or print this page if required by clicking on the relevant link. This option is on all pages.

Active Trainees tab

Once you accept trainees onto your scheme, they will appear on this screen:

You can hover over the **Registered Site** column to see full details of the address of the selected trainee's registered site location.

You can hover over the site to see full address details.

If a trainee wishes to update their work address with ICE, they should do so through their MyICE site www.ice.org.uk/myice (My Profile > Contact details).

The trainee's SCE (as indicated during their application) is shown. If this field is blank or the details have changed, you should contact cats@ice.org.uk and tell us who to assign as the new SCE for this trainee.

If a trainee is no longer working for you, please contact their SCE to fill in the **partial completion** form on IPD Online. This will close the trainee's training agreement with your company and enable the trainee to transfer to their new employer's scheme

Missing trainees

If a trainee has set a training agreement start date in the future, they will not show on the active trainee's tab until their start date arrives.

If a trainee has signed up for Mentor Supported Training scheme instead of training agreement scheme, they will not show on TAGSO.

Closed Trainees tab

This tab shows all trainees who have completed or cancelled their training agreement with the company or transferred their agreement to a different company.

| Trainee Name | TA Status | SCE | TA Start Date | TA End Date | Completion Site | Completion Level |
|--------------|-------------|-----|---------------|-------------|-----------------|------------------|
| | Cancelled | | 01/01/2008 | 15/10/2008 | | |
| | Cancelled | | 01/01/2008 | 15/10/2008 | | |
| | Cancelled | | 25/10/2007 | 21/08/2008 | | |
| | Transferred | | 17/03/2008 | 27/06/2008 | | |
| | Cancelled | | 01/08/2007 | 19/12/2007 | | |
| | Cancelled | | 01/05/2007 | 12/12/2007 | | |
| | Cancelled | | 01/12/2007 | 24/06/2008 | | |
| | Cancelled | | 05/12/2007 | 04/01/2008 | | |
| | Cancelled | | 01/12/2007 | 24/06/2008 | | |
| | Transferred | | 01/01/2007 | 18/03/2008 | | |

The **TA Status** denotes the reason they are in this tab.

The **TA End Date** is the date that the training agreement was closed/transferred.

For those trainees who have **completed** their training agreement with the company, the completion site and level are shown. The completion level shows the Engineering Council registration level they are eligible for.

Those trainees who have been **cancelled** due to an incomplete graduate application will show as red. Hover over them to view full details for the reason of cancellation. These trainees should not re-apply, but should contact graduates@ice.org.uk to re-activate their application once they have sent us the missing documentation.

| Trainee Name | TA Status | SCE | TA Start Date | TA End Date | Completion Site | Completion Level |
|--------------|-------------|-----|---------------|-------------|-----------------|------------------|
| | Cancelled | | 01/08/2007 | 19/12/2007 | | |
| | Cancelled | | 01/05/2007 | 12/12/2007 | | |
| | Transferred | | 01/01/2007 | | | |
| | Transferred | | 01/01/2007 | | | |

Payment of subscriptions

If a graduate does not pay their graduate membership at the beginning of each year, their training agreement will automatically be cancelled due to lapsed membership status. Once a trainee pays their membership subscriptions fees they should contact cats@ice.org.uk to reinstate their training agreement.

Trainees who begin as student members of the ICE will need to ensure they transfer to graduate membership and pay their membership fees otherwise their training agreement will also be cancelled until payment is made.

SCEs tab

This tab shows all of the ICE-registered SCEs working at the company:

| SCEs | | | | | Logout |
|--|----------------------|--|-------------------|---------------------|---------|
| If any details on this page are incorrect, please export to excel, annotate & return to cats@ice.org.uk | | | | | |
| SCEs linked to the scheme: | | | | {EXPORT} | {PRINT} |
| Person ID | SCE Name | E-mail | Current Site | No. Active Trainees | |
| | Adams, Robin William | robin@abccconstruction.co.uk | | 11 | |
| | Hughes, David | david@abccconstruction.co.uk | WATFORD, WD17 3EX | 3 | |
| | Lloyd, Howard John | howard@abccconstruction.co.uk | BRISTOL, BS1 6QS | 3 | |
| | | | | 5 | |
| | | caroline.sander@ice.org.uk | | 21 | |

The SCEs' email addresses and current sites are listed. If any of these details are incorrect or blank, please ask the SCE to update their contact details via MyICE (www.ice.org.uk/myice).

If an SCE is no longer working for you, please contact cats@ice.org.uk, with the SCE's membership ID and name of the SCE to be removed from your company's SCEs list. If the SCE still has active trainees, please tell us who their new SCE should be and we will assign the new SCE on the system.

It is possible to view the active trainees linked to that SCE by clicking on the number in the 'No. Active Trainees' column for the selected SCE. e.g. Adams, Robin William has 11 active trainees – see example below:

| Active Trainees for SCE Mr RW Adams | | | | | | | Logout |
|--|------------------------|----------|--------------|-------------------|-------------|---------------|---------|
| If any details on this page are incorrect, please export to excel, annotate & return to cats@ice.org.uk | | | | | | | |
| Trainees active on your scheme for SCE Mr RW Adams: | | | | | | {EXPORT} | {PRINT} |
| Trainee ID | Trainee Name | Grade | Grade Status | Current Site | SCE | TA Start Date | |
| 62550547 | Bloomer, Aoife | Graduate | Current | LEEDS, LS9 0AZ | Mr RW Adams | 01/02/2008 | |
| 60056483 | Child, James William | Graduate | Current | LEEDS, LS9 0AZ | Mr RW Adams | 30/11/2007 | |
| 64591427 | Cunningham, Caroline | Graduate | Current | BRISTOL, BS1 6QS | Mr RW Adams | 25/02/2008 | |
| 46722184 | Davies, Julian Maxwell | Graduate | Current | WATFORD, WD17 3EX | Mr RW Adams | 11/12/2007 | |
| 62484296 | Dillon, Thomas | Graduate | Current | LEEDS, LS9 0AZ | Mr RW Adams | 01/12/2007 | |
| 64581048 | Giddings, Vanessa | Graduate | Current | BRISTOL, BS1 6QS | Mr RW Adams | 06/09/2007 | |

Payments tab

The company's direct debit (DD) transactions summary is shown on this page:

| Payments | | | | | Logout |
|---|------------------|-----------|----------------|-------------|---------|
| If any details on this page are incorrect, please export to excel, annotate & return to cats@ice.org.uk | | | | | |
| Direct Debits: (click on the month to obtain further details) | | | | {EXPORT} | {PRINT} |
| Month | Download Status | Amount | Payment Status | Amount Paid | |
| February | Ready for Export | £ 2745.00 | Paid | £ 2745.00 | |
| March | Ready for Export | £ 2745.00 | Paid | £ 2745.00 | |
| April | Ready for Export | £ 1525.00 | Due | £ 0.00 | |
| May | Ready for Export | £ 1830.00 | Due | £ 0.00 | |

Month

The schedules for each month are listed here. You can click on the required month to see more details. The further details option shows details of the direct debit as well as the individual trainees which will be paid for as part of that transaction – see picture below of 'Scheduled transaction for April 2008'.

Only the current calendar year payments are shown here.

Download Status

This shows the status of the direct debit batch which can be one of the following:

- **Ready for Export** - this means the DD schedule is now closed and no more payments can be added to this month's DD schedule. It also means this schedule is ok to be downloaded and sent to the company's finance department for approval.
- **Open** – this means the DD schedule is 'live' and trainees accepted during the current month are still being added.

NB. Applications 'accepted' by the TAGSO administrator are automatically added to the DD schedule for the month after the next i.e. trainees accepted in **February** are added to the **April** schedule, trainees accepted in **March** are added to the **May** schedule etc.

Amount

This will display the total amount due for that transaction.

Payment Status

This displays the status of the payment which can be one of the following:

- **Paid** – this means the total amount displaying in the 'Amount' column is paid, and the 'Amount Paid' column will also display this amount.
- **Due** – this means the total amount displayed in the 'Amount' column is now due for collection and the 'Amount Paid' column will display **£0.00**.
- **At Bacs** – this means the amount displayed in the 'Amount' column has been sent to the bank for collection and is awaiting acceptance from the company's bank account. The 'Amount Paid' column will still display £0.00 at this stage. It may remain as this status for around 5 days.

Scheduled transaction for April 2008 Logout

If any details on this page are incorrect, please export to excel, annotate & return to cats@ice.org.uk

April 2008 {EXPORT} {PRINT}

| | |
|----------------|--|
| Account Name | ABC |
| Account No. | 00180949 |
| Sort Code | 30-91-44 |
| ICE Ref No. | 1869687 |
| Payment Month | April 2008 |
| Schedule Total | £ 1525.00 |
| Company Ref. | <input type="text" value="ICE200804"/> |

Payment will be taken on or around the 20th of each month.

For payments of ICE training agreements for:

| Trainee ID | Trainee | Site | Amount | Ref |
|------------|--------------------------|--------------------|----------|-----------------------------------|
| 60607443 | Cooper, Martin James | WATFORD, WD17 3EX | £ 305.00 | <input type="text" value="abc1"/> |
| 49421888 | Ford, Alan | WATFORD, WD17 3EX | £ 305.00 | <input type="text" value="abc2"/> |
| 61258119 | Graham, Alastair Stewart | CAMBRIDGE, CB1 2EE | £ 305.00 | <input type="text"/> |
| 44993838 | Graham, Robert William | BRISTOL, BS1 6QS | £ 305.00 | <input type="text"/> |
| 62600308 | Hall, Robert | WATFORD, WD17 3EX | £ 305.00 | <input type="text"/> |

Please note that this screen will act as a replacement invoice. We do not charge VAT on our training schemes.

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|------------|------------|-----------|------------|---------------|----------|----------|------------|----------|------------|---------|--------|
| | Account No | Account No | Sort Code | ICE Ref No | Payment Month | Schedule | Company | Trainee ID | Trainee | Site | | Amount |
| 1 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | 60607443 | Cooper, M | WATFORD | |
| 2 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | 49421888 | Ford, Alan | WATFORD | |
| 3 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | 61258119 | Graham, A | CAMBRID | |
| 4 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | 44993838 | Graham, R | BRISTOL | |
| 5 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | 62600308 | Hall, Robe | WATFORD | |
| 6 | ABC CON | ABC | 180949 | 30-91-44 | 1869687 | Apr-08 | 1,525.00 | ICE200804 | | | | |

The company's administrator can use their own references in the **Company Ref.** or **Ref** fields (either to reference the monthly schedule as a whole or to reference the individual trainee (i.e. to include a separate cost centre for each trainee)). This is for your internal use only and will not be used by ICE. Remember to click on **Save Changes** button to save the references.

Once you have completed the references, you can download into excel and pass it on to your finance team for approval. You can open the excel file directly or save it to your local drive.

Important note: We recommend that you set up a reminder to send through the schedule for the following month to your finance team on the 1st of each month. For example, you can export and send the schedule for May to your finance team on 1st April. This will provide your finance team with adequate notice and avoid any misunderstandings when the direct debit is taken from the company's bank account.

Our vision

Civil engineers at the heart of society, delivering sustainable development through knowledge, skills and professional expertise.

Core purpose

- To develop and qualify professionals engaged in civil engineering
- To exchange knowledge and best practice for the creation of a sustainable and built environment
- To promote our contribution to society worldwide

Diversity statement

As a membership organisation and an employer, we value diversity and inclusion - a foundation for great engineering achievement

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