# Early Years Provider Portal

## A guide for childcare settings

Version: September 2024

# Contents

# 1. Introduction

**Please read this document before submitting any information, as this will help you understand the process of logging into the Provider Portal, updating your records and submitting your headcount and supplementary claims correctly.**

The Provider Portal has been developed to make the submission of information to Lancashire County Council more secure and convenient.

This document contains user guidance to help you access the Provider Portal, submit details of your childcare service to the Family Information Service and submit Early Education Funding claims for all eligible children if registered for this.

For assistance with any issues accessing or using the Provider Portal please contact us by email on FEE234@lancashire.gov.uk quoting your name, the setting/child minder name, the Ofsted Registration number, and brief details of what the issue is, and we will respond.

## 1a. Early Education Funding (EEF) general rules

- You cannot claim more than 15 Funded/Expanded hours per week/570 hours per year.
- You cannot claim more than 15 Extended hours per week/570 hours per year.
- No session can be longer than 10 hours per day.
- There is no minimum session length (subject to the requirements of registration on the Ofsted Early Years Register).
- No session can be delivered before 6.00am or after 8.00pm.
- Children can only claim EEF across a maximum of two sites in a single day.
- Government funding is intended to cover the cost to deliver 15 or 30 hours a week of EEF high quality, flexible childcare places. It is not intended to cover the cost of meals, consumables, additional hours, or additional services.
- You can charge for meals and snacks as part of the EEF entitlement place and charge for consumables such as nappies or sun cream and for services such as trips and musical tuition. Parents should therefore expect to pay for these, although these charges cannot be a condition of accessing a place. Where Parents are unable or unwilling to pay for meals and consumables, you are responsible for setting your own policy on how to respond, with options including waiving or reducing the cost of meals and snacks or allowing Parents to supply their own meals. You should be particularly mindful of the impact of additional charges on the most disadvantaged Parents.
- You cannot charge Parents "top-up" fees (the difference between your usual fee and the funding you receive from the Local Authority to deliver EEF places) or require Parents to pay a registration fee as a condition of taking up their child's EEF place.
- You must ensure you show the funded hours at a £0 charge on the Parent's invoice before any charges for additional hours/services are made.
- You must retain evidence of the child's Date of Birth, for example, a copy of the birth certificate or passport.
- You must have a signed Parental Agreement in place for the term(s) you are claiming EEF.
- You must have attendance records that reflect the actual hours of attendance that you are claiming for.
- Headcount/census date is always a Thursday. As some child attendance patterns do not include a Thursay, we have extended this to headcount/census week, being the Monday to Sunday including the headcount/census date. Therefore, any child present or planned present the week of headcount/census day should be included in your headcount claim. Also ensure that the Present During Census box is ticked.

- If a 9 month-2-year-old child is eligible for the expanded 15 hours they must have received a Working Famiiles valid Eligibilty Code. You cannot claim funding until you have checked the validity of the code as you will be required to enter the code via the Provider Portal when you make the claim. You cannot include any 2-year-old children in your claim without a valid code.
- If a 2-year-old is eligible for the funded/expanded 15 hours they must have received a LCC Golden Ticket Letter containing their unique EY voucher code or a Working Famiiles valid Eligibilty Code. You must obtain a copy of the letter/valid eligibility code before you offer a 2-year-old funded place. You cannot claim funding until you have seen a copy of the letter/checked the validity of the code as you will be required to enter the code via the Provider Portal when you make the claim. You cannot include any 2-year-old children in your claim without a valid code.
- If a 2-year-old child is eligible for the 'funded' 15 hours before the start of the current term but delays their start date to part way through a term then you can only claim pro rata for the remainder of the term.
- If a 9 month – 2 year old child or 2-year-old child only becomes eligible for the working families 'expanded' 15 hours part way through the current term, you can only claim for the child from the start of the following term.
- If a 3 or 4-year-old is eligible for the 'funded' 15 hours before the start of the current term but delays their start date to part way through a term then you can only claim pro rata for the remainder of the term.
- If a 3 or 4-year-old child only becomes eligible for the working families 'extended' 15 hours part way through the current term, you can only claim for the child from the start of the following term.

# 1b. EEF term dates

EEF term dates **do not** match school term dates and are the same dates each year.

| Term | Term Dates |
|---|---|
| Autumn | 1 September – 31 December |
| Spring | 1 January – 31 March |
| Summer | 1 April – 31 August |

# 1c. Maximum weeks/hours allowed per term/year

The maximum number of weeks/hours each child can claim in a term/year is detailed below:

| Term | Maximum funded weeks per term | No. of Funded Hours (2YO Golden Ticket & 34YO Universal Hours) | No. of Extended/ Expanded Hours (Working Families Entitlements) | Total maximum hours per term if eligible for Funded and Extended/Expanded hours |
|---|---|---|---|---|
| Autumn | 14 | 210 | 210 | 420 |
| Spring | 11 | 165 | 165 | 330 |
| Summer | 13 | 195 | 195 | 390 |
| **Total** | **38** | **570** | **570** | **1140** |

**Important note:** If a child claims their full 15/30 hours per week you will not be able to claim funding for every week in the term, as there are more calendar weeks in a term than there are funded weeks. The number of weeks in the term is defaulted to the termly maximum i.e. 14, 11

or 13, therefore, you **must** update the number of hours to ensure you do not claim more hours than the termly maximum allowed.  However, you can choose to 'stretch' the funding and claim less hours per week over more than 38 weeks of the year.

# 1d. Stretching the entitlement

It is possible to stretch the EEF funding over the academic year by claiming less than the maximum 15 Funded or the 15 Extended/Expanded hours per week.  If this is the case, please note:

- If the total 'stretched' hours for the academic year are still equal to the maximum number of funded hours allowed in the term/year, it is easier for you to enter this on your headcount claim as the standard number of weeks and hours for that term, for example, if a parent claims the full 570 funded hours and 570 extended hours over 51 weeks of the year, which equates to 22.35 hours actual attendance per week, claim the standard hours in each term, for example, in the Spring term you would claim 11 weeks and 15 funded hours and the same for the extended hours.  This will avoid any rounding issues.
- If the total 'stretched hours' for the academic year are less than the full entitlement, you need to divide the total hours the child is attending in the academic year by 38 (i.e. as the Provider Portal does not allow you to claim for more than 38 weeks in an academic year. For example: if a child attends 10hrs a week over 52 weeks of the year, you would claim 13.68 hrs in each termly headcount (i.e. child attends 10hrs per week over 52 weeks = 520 hrs in total, divided by 38 weeks = 13.68hrs per week in the termly headcount claim).
- Hours can only be stretched over an academic year (1 September to the following 31 August), if a child starts part way through the academic year or only qualifies to claim the entitlement part way through the academic year they will only be able to claim pro-rata using the funding still available for the remainder of the academic year. i.e. if a child starts on the 1 January or only becomes eligible to claim the funding from 1 January, they will only be able to claim for Spring = 165 hours and Summer 195 hours.  And the same if a child only starts 1 April or only becomes eligible to claim the funding from the 1 April, they will only be able to claim the funding for the Summer term = 195 hours.

# 1e. Banking the entitlement

Where a parent is taking less than their annual entitlement it is possible to bank the EEF funding. If this is the case, please note:

- You cannot assume that the parent will want to bank hours, so these must be agreed with the parent, at the outset, which term the parent would like to use their banked hours.
- Where a parent is unsure if they will need to bank any hours to be used later, you may decide to claim the additional hours as and when needed on an ad hoc basis via the supplementary process rather than having to repay the funding.
- For all banked hours used you must also keep a record of the actual dates that these have been taken, for audit purposes.
- If at the end of the academic year the parent has not used all the hours that have been banked, you must notify the local authority so that these can be re-paid.

# 1f. Early Years Pupil Premium (EYPP)

Eligibility for EYPP is based on the following criteria:

- Universal Credit with a household income of less than £7,400 a year (after tax and not including any benefits you get)
- Income-Based Jobseekers' Allowance - Jobseeker's Allowance
- Income-Related Employment and Support Allowance - Employment and Support Allowance
- Child Tax Credit , **not** entitled to Working Tax Credit and household income less than £16,190

- Support under part VI of the Immigration and Asylum Act 1999 - [part six of the Immigration and Asylum Act 1999](#)
- Guarantee element of State Pension Credit - [State Pension Credit](#)
- [Income Support](#)
- Working Tax Credit 'run on' – the payment you receive for a further four weeks after you finish work - [Working Tax Credit](#)

Children may also get EYPP if they are looked after or have left care through:
- adoption
- special guardianship order
- a child arrangements order

# 1g. Claiming EYPP

EYPP is for all 9 months+ eligible children who are accessing 15 hours of Early Education Funding. Early Years providers are responsible for identifying children from low-income families who may be eligible and providers must gain the consent of parents/carers to share their information for the Local Authority to undertake an eligibility check by ensuring that a signed Parental Agreement is in place.

At the start of each term, any children that have been carried forward from the previous term who were EYPP eligible will still have an EYP indicator displayed against them in the on-line Provider Portal. For any new children that have started to access a place the local authority will undertake the EYPP checks for new children that were submitted via the on-line Provider Portal by the specified deadlines.

All the information required for us to undertake an EYPP check is recorded on the parent/carer tab when making a claim. You will not be paid EYPP if you fail to include the required information as part of your headcount claim, as the information is automatically calculated with the headcount payment due each term.

The parent/carer information recorded in the on-line Provider Portal is uploaded by the Local Authority to the national Eligibility Checking Service (ECS) and if the information is inaccurate in anyway, it will return a 'not eligible' result.

- For all 9months+ eligible children, please ensure that you include the parent's forename, surname, date of birth, email address, contact number and NI/NASS number when you submit claim.

- If the consent button has not been ticked the information is not included in the upload to ECS, and settings may therefore miss out on funding if they fail to tick the consent button.

# 1h. EYPP for Child Looked After (CLA) / Adoption / Special Guardianship Order (SGO)

- We will check our records for any CLA children within Lancashire and note them as such. However, after headcount payment, if you have not been funded for a child you believe to be a CLA within Lancashire, please send a secure email to fee234@lancashire.gov.uk advising of the child's name, address, date of birth, along with the Social Worker's name and contact details in order for us to validate the claim.

- Any CLA that you are including on your headcount submission, that are not under the jurisdiction of Lancashire County Council, will require written confirmation from the owning Authority that the child is a CLA within their Authority. The owning Authority is to email confirmation to fee234@lancashire.gov.uk before the headcount closure date. If we have not received written confirmation from the owning Authority before headcount closure date, you will not receive EYPP payment for the child in that term.

- For Adoption or Special Guardianship children you must email the evidence of eligibility to fee234@lancashire.gov.uk before the headcount closure date e.g. copy of adoption order/ SGO.  Failure to do so will cause delay in your payment being processed as we will be unable to validate your claim.

# 1i. How do I know which children qualify for EYPP?

Once we have completed the EYPP checks the provider portal will be updated. On the 'Actuals' tab you will be able to view which children qualify for EYPP by looking under the Child Weighting column.



The EYPP will also show on the child's record on their summary tab.

| Name: | DOB: | |
|---|---|---|

| Summary | Child Details | Parent / Carer Details | Funding Details | Notes |

| Term Start Date | 08-Jan-2024 |
| Term End Date | 28-Mar-2024 |
| No of weeks attended | 11.000 |
| Nominated for DAF | No |
| ▶ Provider Total Rate | £5.110 |

| **Funding** | |
|---|---|
| Funded Hours Per Week | 13.68 |
| Funded Hours for Term | 150.48 |
| **Funding Amount @ Provider Rate** | **£768.95** |
| ▼ Child Weightings | **£99.32** |
| Early Years Pupil Premium (£0.660) | £99.32 |
| **Funding Amount** | **£868.27** |
| **Totals** | |
| Funded Hours Per Week | 13.68 |
| Funded Hours for Term | 150.48 |
| **Total Funding (excl. Adj)** | **£868.27** |
| Total amount from Adjustments | £0.00 |
| Total amount from Pending Adjustments | £0.00 |
| **Total Funding For Term (inc Adj)** | **£868.27** |

# 1j. Disability Access Funding (DAF)

DAF is available for eligible 9months+ children who receive Disability Living Allowance (DLA) and are accessing an Early Education Funded childcare place.  Four-year-old children who are in primary reception classes are not eligible for the funding.

Parents are required to 'nominate' the provider they want the funding to be paid to.  The funding is a yearly one-off lump sum payment and is not transferable if the child moves to a different provider.  Subsequent providers will not receive any funding if the DAF has already been paid within the last 12 months.

# 1k. Claiming DAF

To claim DAF you must apply via email and send a copy of child's most recent DLA award letter and completed Parental Agreement or DAF application form to fee234@lancashire.gov.uk.  Once we have processed the DAF application you will receive a letter confirming the outcome.

If eligible you will be required to select 'yes' in the Nominated for DAF box on the Funding Details tab when making your claim.  Note: Please ensure you do not nominate any children as DAF on your claim unless you have received written confirmation from us to confirm the child is eligible for DAF.  If settings nominate children as DAF, who have not been confirmed eligible, we must manually update the record which is time consuming and **could create delays to your final balancing payments.**
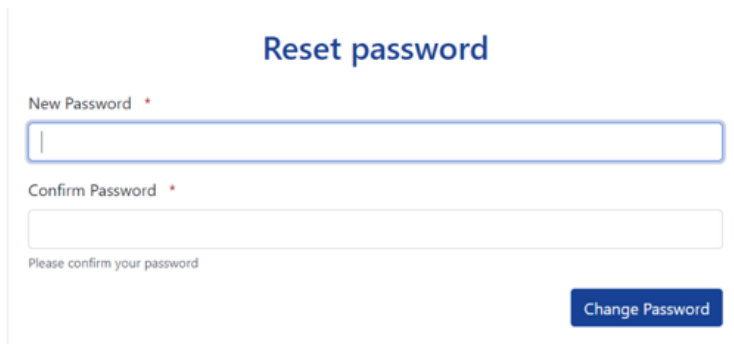
# 1.l System Requirements

To use the Provider Portal, you want to be using Microsoft Edge as you may find that when you click the 'Edit' link on a child's record nothing happens, and you cannot enter the details of each child.  The solution to this is use a different browser such as Mozilla Firefox, Google Chrome™**.

You may also encounter display issues when using a tablet or mobile phone to complete your claims.  Usually these can be resolved by scrolling across the browser window to see if any pop-up boxes are preventing you continuing with your claim.  If you are struggling to view the portal on your mobile / tablet device please log out and use a computer to complete your claim.

# 2. Using the Provider Portal for the first time

## 2a. Setting a new password

First time users of the Provider Portal will be prompted to change their password after logging in. Log in with the username and password you have been given. Once you have clicked 'Sign In' you will then see the following message. Please see the password standards section above for password requirements.



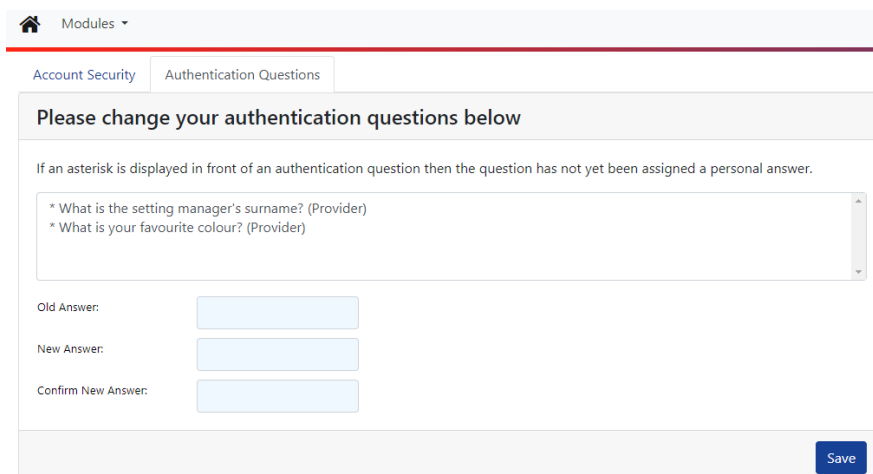Type in and confirm your new password and click the change password button.

## 2b. Authentication questions

Following set up of your new password you will also need to set your 'Authentication Questions' as detailed below.

'Authentication Questions' are in place to help protect the information you enter on the Provider Portal. This is like many websites such as online banking whereby you create an answer to a question, and you will then be asked for random letters from the answer each time you access the Funding section of the Provider Portal.
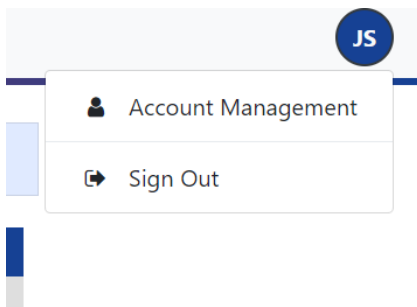


To set your 'Authentication Questions' click on your user initials in the top right-hand side and click on Account Management.

To create authentication question answers please click on the **'Authentication Questions'** tab.

First highlight the authentication question you wish to amend ie. What is the setting manager's surname (provider).

- Click on 'What is the setting manager's surname'
- In the old answer box type the word **answer**
- Type your new answer in the new answer box
- Confirm your new answer in the confirm new answer box
- Click save

Once you have saved your new answer you should get a message to confirm the new answer has been saved successfully. Repeat the process for the second question which is 'What is your favourite colour?'

- Click on 'What is your favourite colour'
- In the old answer box type the word **answer**
- Type your new answer in the new answer box
- Confirm your new answer in the confirm new answer box
- Click save

Once you have saved your new answer you should get a message to confirm the new answer has been saved successfully.

If you need to change the authentication questions in the future then the answers you will use will be those you set up when first accessing the provider portal.

<span style="color:red">Please note:</span>
- <span style="color:red">You will not be able to type your new answer until you have highlighted the authentication question you wish to amend.</span>
- <span style="color:red">Your new answers need to be at least 4 letters or more.</span>
- <span style="color:red">If there is still an * against any question, this means that the authentication question has not yet been set.</span>

Once all the questions have been answered, click on the 'Modules' link at the top left-hand side of the screen and then click on 'Childcare / Service Provider to go back to the home screen of the provider portal.
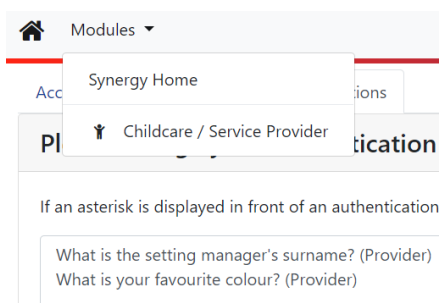


For future logins, every time you click on the 'Funding' tab at the top of the page, you will be asked for random letters from one of the two authentication questions you will need to enter the relevant letters of the answers you created when you first logged in to set up the authentication questions.

Home  Forms  Funding

**Security question**

For increased security, you are being prompted to enter the answer to one of the Authentication Questions.
**What is the setting manager's surname?**

Character  4      6      8
         [A ▾]  [A ▾]  [A ▾]

[Submit]

Choose the correct letters for your answer from the drop-down boxes and then click on the submit button.

Once you have clicked submit, you will then be able to access all the Provider Portal pages until you log out.

# 2c. Setting up Multi-Factor Authenticator

**Provider Portal Sign In**
- When you first login to your account or you have been issued with a temporary password you will be prompted to set up two-factor Authentication.

**Two-Factor Authentication**
- In addition to changing your password, Two-factor Authentication has been enabled within the Provider Portal.  We highly recommend the use of this new feature to provide an extra layer of security for your data.

**A guide to setting up Two-Factor Authentication**

- An authenticator app, which supports time-based one-time passwords (TOTP), is required to be downloaded to your smartphone or tablet to enable you to prove your identity and permit access the system.

  We recommend the use of Microsoft Authenticator for this purpose.

- Having signed into your portal account successfully, click on the Account Details button on the top right of the page.  It will look like a blue circle with initials from your username displayed, similar to the image shown below:



- Select 'Account Management'
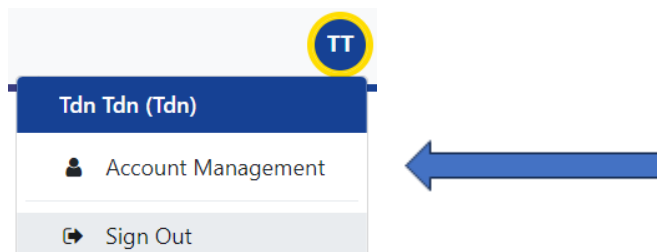


- Click the 'Manage 2FA button', located in the centre of your screen.  If the Manage 2FA button is not available on your account please contact the team.
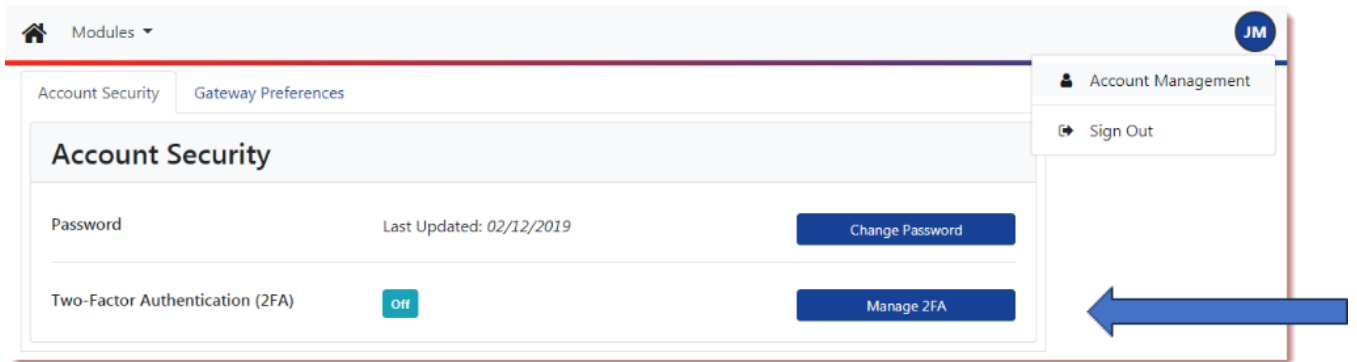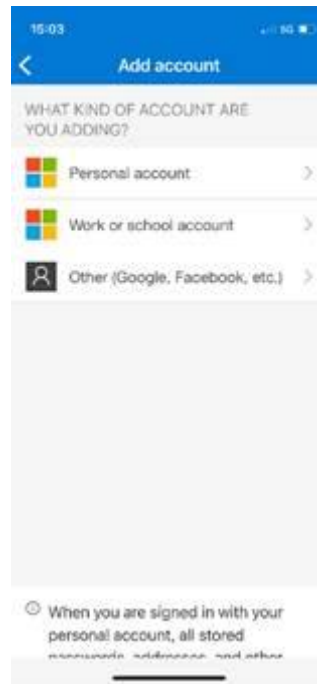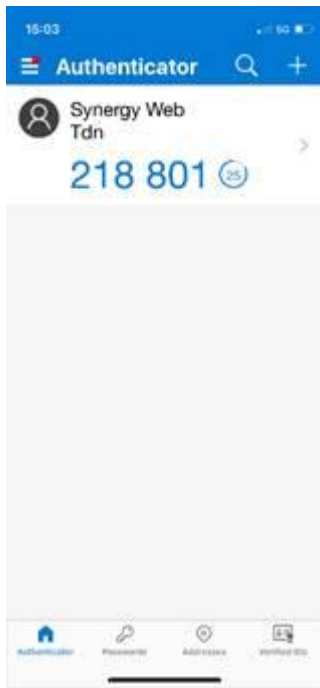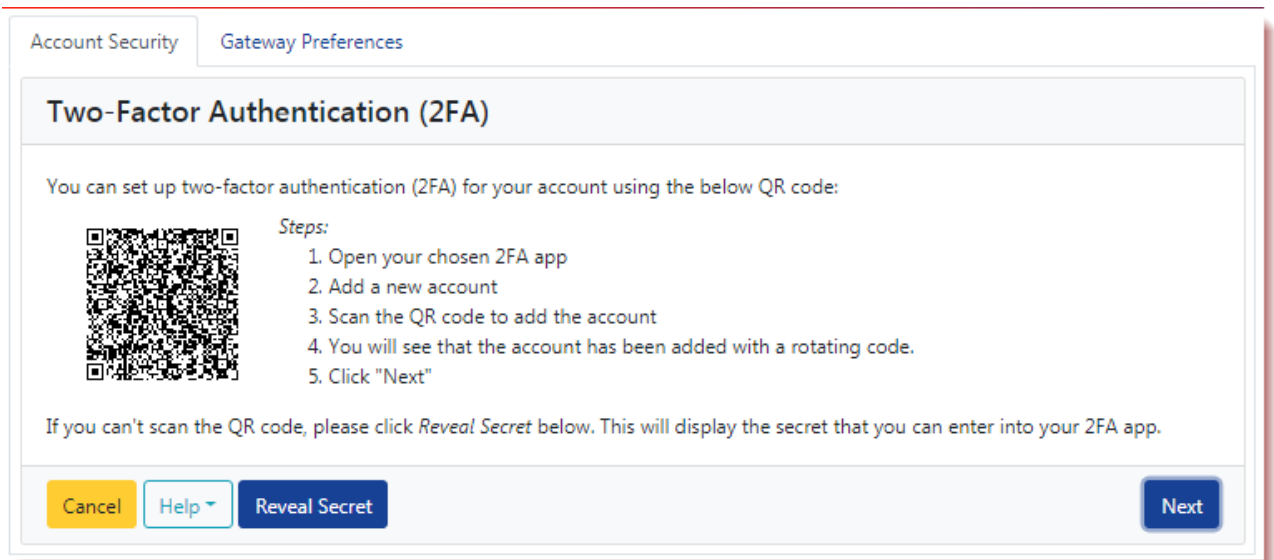
- Click Enable 2FA.
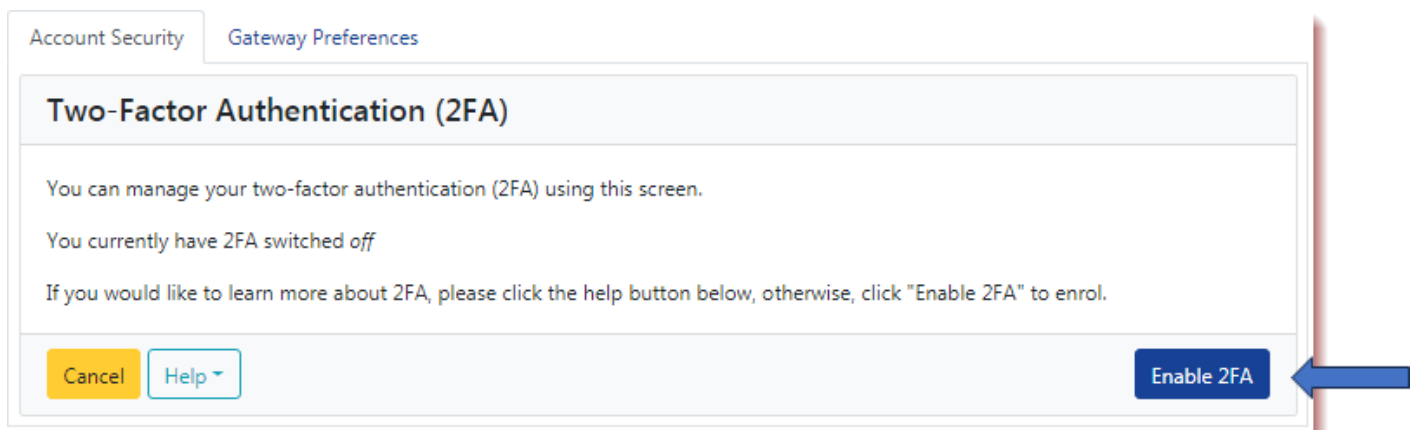


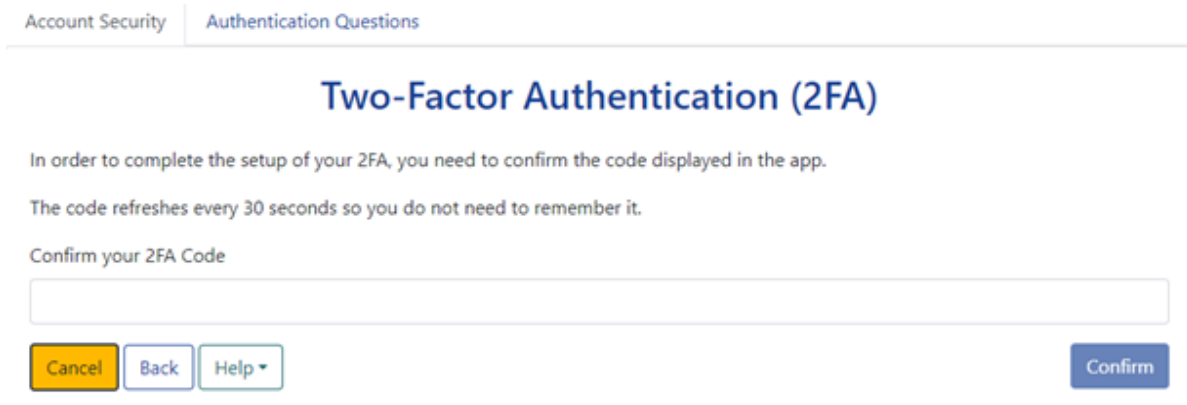- Enter your password and click 'Next'



- Using the Authenticator app, click on the + button on the top of the screen then select Other account (Google,Facebook etc.).  This will prompt you to scan the QR code provided on your Provider Portal screen.  If it is not possible to scan the QR code click Reveal Secret.

- Scan the QR code



## Two-Factor Authentication (2FA)

You can set up two-factor authentication (2FA) for your account using the below QR code:

Steps:
1. Open your chosen 2FA app
2. Add a new account
3. Scan the QR code to add the account
4. You will see that the account has been added with a rotating code.
5. Click "Next"

If you can't scan the QR code, please click *Reveal Secret* below. This will display the secret that you can enter into your 2FA app.

Cancel | Help ▾ | Reveal Secret | Next

- A 6 digit code will be displayed.
- Following the scan of the QR code Click 'Next'.
- To complete the setup, the code displayed on the app should be entered into the Confirm your 2FA code box.
- The click confirm.

Account Security | Authentication Questions

## Two-Factor Authentication (2FA)

In order to complete the setup of your 2FA, you need to confirm the code displayed in the app.

The code refreshes every 30 seconds so you do not need to remember it.

Confirm your 2FA Code

Cancel | Back | Help ▾ | Confirm

- Click the 'Enable 2FA' button
- Enter your password to confirm



- Click 'Finish'



- You will now be taken back to the Security page which confirms your Two-Factor Authentication (2FA) is ON.



- If you wish to turn off the two-factor authenticator click 'manage 2FA' and request to turn off.

# 3. Provider Portal Accounts

## 3a. Requesting a user account

Ofsted will notify us of when a registration becomes active, and we will issue you log in details for the provider portal. If you would like to register your childcare setting for Early Education Funding, please contact us at FEE234@lancashire.gov.uk
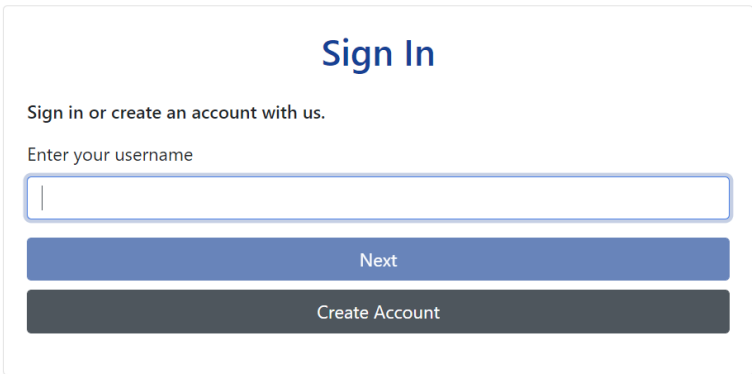
# 3b. Requesting additional user accounts

If you require an additional user account then the authorised signatory of the funding agreement must log into the provider portal and complete the 'Access to Provider Portal Additional Users Form'.  Once submitted the form will be assessed and authorised.  Each username must have its own email address.  Please note: If users have access to forms and funding they will be able to submit headcount or supplementary claims and update provider and bank details forms.

# 3c. Accessing the Provider Portal
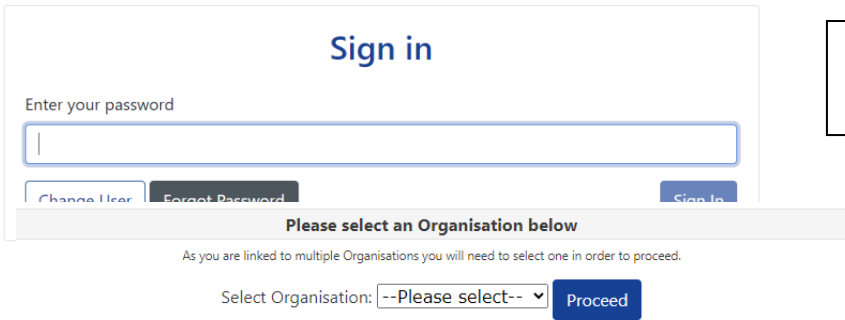
The Provider Portal can be found at the following web address: Sign In - Synergy (lancashire.gov.uk).  We recommend that you save the link as a favourite on your internet browser.

# 3d. Logging in to the Provider Portal



Type in your Username and click on the next button.

Type in your password and click on the sign in button.

If you have multiple accounts when you first log in you will need to click on the drop down box to select which organisation you wish to review.

Click 'Proceed'

# 3e. Forgotten your password

If you have forgotten your password you will need to email FEE234@lancashire.gov.uk to request your password is reset.

The EEF Team will provide you with a temporary 'one-time' only password.  When you login with the temporary password you will be required to set your new password, once you have chosen your new password click on the change password box and you will be taken into the account management section of the provider portal.

## Sign In

Sign in or create an account with us.

Enter your username

TDN

**Next**

**Create Account**

Enter your username as normal and click next.

## Sign in

Enter your password

Change User | Forgot Password | Sign In

Type in the temporary password provided and click on the sign in button.

## Reset password

New Password *

Confirm Password *

Please confirm your password

**Change Password**

Enter and confirm your new password then click on the change password button.

## Sign in

Enter your password

Change User | Forgot Password

**DO NOT USE THE 'FORGOT PASSWORD' BUTTON AS THIS IS NO LONGER IN USE.**

## Forgot Password

Request a token to reset your password, which we will email to you to verify your identity.

Enter your username

You must enter a username to request a token

Start Again | I have a token | Help ▾ | Request Token

**DO NOT USE THE 'REQUEST TOKEN' BUTTON AS THIS IS NO LONGER IN USE.**

To move between your organisations you will need to click the blue circle in the top right-hand side and sign out. You will need to log back in to select a different organisation.

**Please select an Organisation below**

As you are linked to multiple Organisations you will need to select one in order to proceed.

Select Organisation: --Please select-- ⌄    Proceed

# 3f. Changing your password

If you wish to change your password at any time
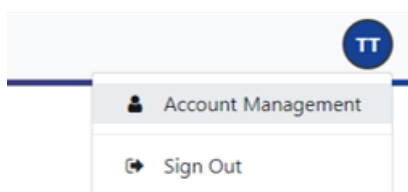
Click on your user initials at the top right-hand corner of the screen and click on account management.
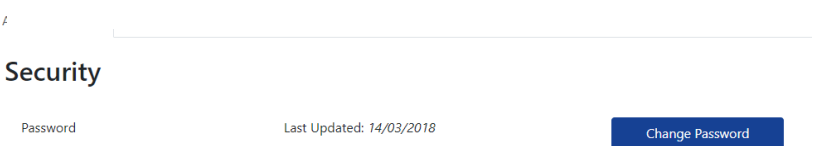
Click the account security tab and click on the change password button.
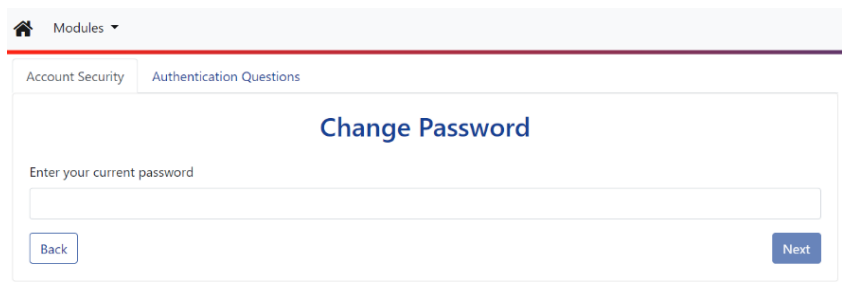
Enter your current password then click on the next button.
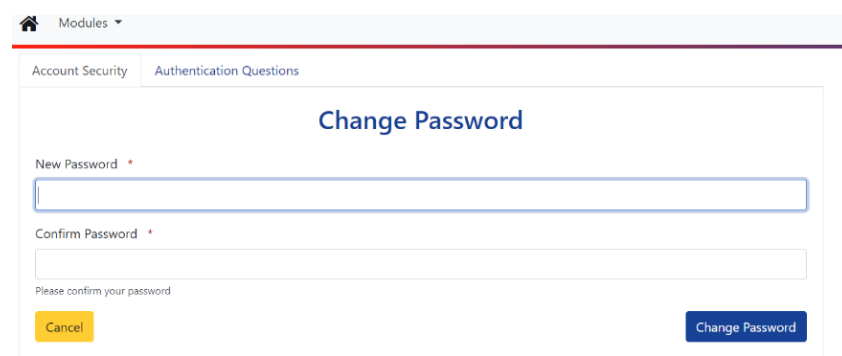
Enter your new password and confirm your new password and click on the change password button.

You will see a message saying ' your password has now been reset and you will be prompted for it when you next sign in. The next time you access the Provider Portal, ensure that you use your new Password that you have just created. To return to the home screen click on the 'Modules' link at the top left-hand side of the screen and then click on 'Childcare / Service Provider'.

# 3g. Password standards

Passwords are case sensitive; however, usernames are not. The more complex the better, as the Provider Portal contains sensitive child data.

- Must contain at least one alphabetical character.
- Must contain a number.
- Must contain an uppercase character.
- Cannot be the same as your username.
- Cannot be any of your last 10 passwords.

# 3h. Logging out of the Provider Portal

You can logout at any time to securely end your Provider Portal session. Any changed or added child records will be saved regardless of whether they have been submitted.
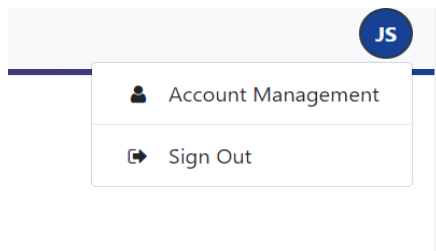


Click on your user initials in the top right-hand corner and click sign out.

You will then get a message to say you have been successfully signed out of Synergy. For security reasons, please close the browser window.



# 4. Navigating around the Provider Portal

If you are linked to multiple registrations you will be asked to select an organisation from the dropdown menu and click 'Proceed'.
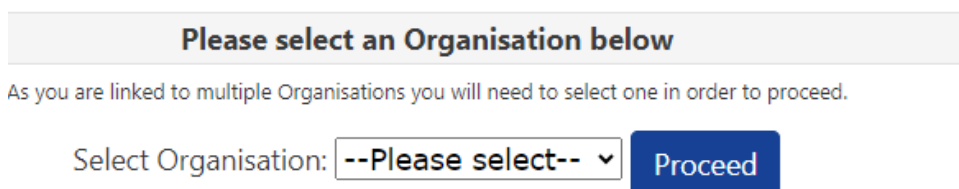


To switch between your registrations you will need to click on the blue circle and sign out then log back into your portal and select a different registration.
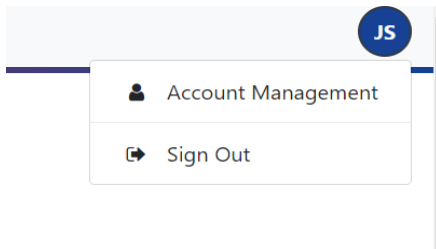
To navigate around the Provider Portal you will need to click on the headings which are located on the tool bar. Each time you log into the Provider Portal you will be taken straight to the home page.
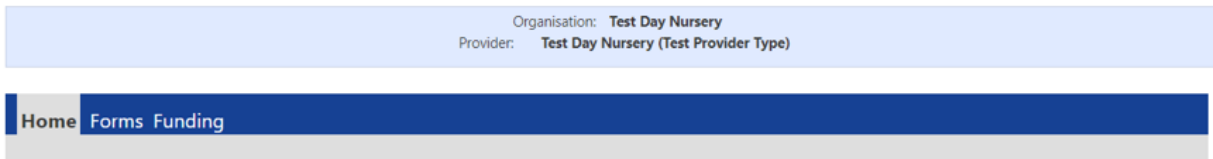


From here you can go straight to the section you require. On the tool bar there are three tabs: **Home, Forms and Funding**. **Please Note: if you cannot see the forms or funding tabs please contact us on FEE234@lancashire.gov.uk so we can update your account access.**

# 4a. Home tab

On the **Home tab** you will see all important messages relating to the provider portal / funding. If you have any notifications regarding your headcount claims, such as un-submitted claims, these will also be displayed on the home page as below. You will need to resolve any warning notifications, otherwise you may miss out on funding.
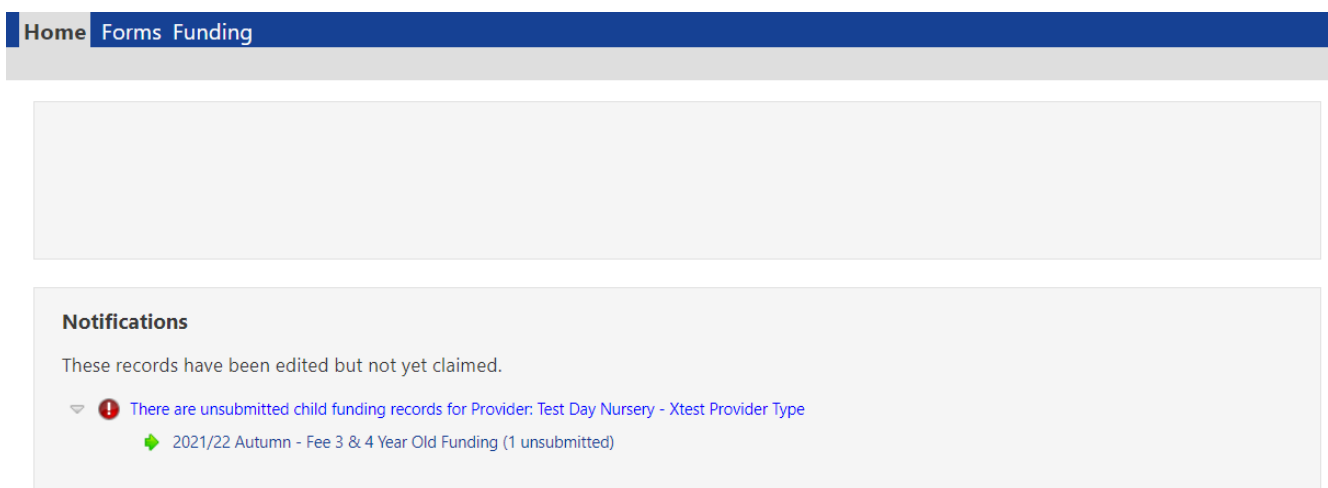


# 4b. Forms tab

The **Forms tab** is where you will find all the relevant documents relating to the Early Education Funding and updating your details. Please note: When completing forms if you have more than one provider type, e.g. breakfast club / after school club you will need to select the correct provider type you wish to complete the forms for.

Use the drop-down box at the top of the page and select the correct provider type you require.

To complete a form click on Forms > Fill in Forms > select the relevant form from the list and once completed click on the submit form button. Once you have completed and submitted your form it will be authorised by a member of the EEF team. There is no need to resend your form through again unless there are any changes. For further information on completing forms please see the forms library section of the guidance notes.
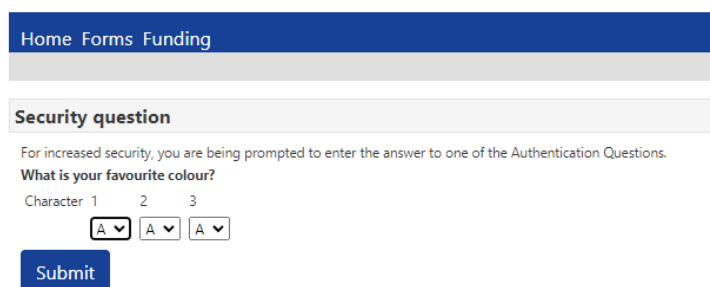


- **Change of Bank Details Request Form**
  You are only required to compete this form if you change your bank details for where the EEF payment is to be made. Please note if you use this form to change your bank details this will change the banks details for all LCC payments.
- **Change to types of funded places offered**
  You are only required to complete this form if you wish to change what funding types you are registered with us for i.e. if you don't currently offer 2 year funding and want to offer 2 year old funding
- **Early Years Census Form**
- You are only required to complete this form once a year in the Spring term and we will email you when you are required to do so.
- **Funding Agreement Acceptance Form**
  You are required to sign this Agreement when there is an update. We will email you when you are required to sign the new Funding Agreement.
- **New EEF Provider Registration Form**
  New Providers are required to complete this form when registering to offer Early Education Funded places.
- **Update Your Details**
  You are only required to complete this form if you change any details about your setting such as email address, what hours you are open, your charges.
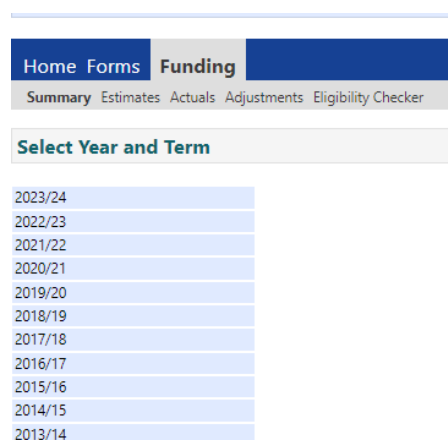
# 4c. Funding tab

The **Funding tab** is where you will complete your estimates, headcount, and supplementary claims.

When you click on the funding tab you will be required to enter characters from your security questions. You should have set the answers to your security question when logging onto the portal for the first time. If you need the answers resetting please contact the EEF team.



Enter the relevant characters and click on submit.

Under the Funding heading there is a second tool bar with sub-headings for Summary, Estimates, Actuals, Adjustments, Eligibility Checker. Further details on each of these sections are included in these guidance notes.



When viewing the information in each of these tabs you will need to select the relevant year and team from the menu on the left-hand side.

- **In the Summary tab** – This is where you can view the term length, i.e. number of funded weeks and your provider rate along with the funded and extended/expanded hours for the term, worked out as a monetary value, any child weighting, for example, EYPP and if the claim has been processed and the date the claim was processed. You will also be able to see payments made for estimates and actuals.
- **In the Estimates tab** – This is where you submit your Estimate hours that you expect to claim in the new term. Please note: you will only be able to submit estimates via this tab when the provider portal is open for estimates. All providers will be sent an email to let them know when the Provider Portal is open for estimates.
- **In the Actuals tab** – This is where you can view, complete, and submit the Headcount Claim. Please note: you will only be able to complete and submit your claims via this tab when the provider portal is open for headcount submissions. We email providers each term to inform them of the headcount arrangements and deadline dates.
- **In the Adjustments tab** – This is where you can enter and view supplementary claims and any other adjustments that have been made, e.g. overclaims. Please note: we can only open the provider portal for supplementary claims once all headcount claims have been processed. You will not be able to make any supplementary claims until the provider portal has been opened by us. We email providers each term to inform them of the supplementary claims process and deadlines.
- **In Eligibility Checker tab** – This is where you need to Validate the Working Families eligibility codes for children who are in receipt of the extended/expanded hours. You must validate all Working Families eligibility codes to ensure they are valid for the term you wish to claim funding for.

# 5. Working Families Codes

Parents can apply for a Working Families eligibility code 16 weeks before their child becomes age eligible however they can only start accessing the extended/expanded hours from the term after the child reaches the eligible age.

Where a parent/carer is issued with their eligibility code after the beginning of term their child became age eligible, they will not be able to take up the extended/expanded hours until the start of the next term. You must therefore check that the Working Families eligibility code 'Validity Start' date is **before** the start of the term in which you are to claim extended/expanded hours for. The table below shows when children can access a place from and when their code must be issued by.

| Child reaches relevant age of eligibility between.. | They can access a place from… | Code must be issued by… |
|---|---|---|
| 1 January – 31 March | 1 April | 31 March |
| 1 April – 31 August | 1 September | 31 August |
| 1 September – 31 December | 1 January | 31 December |

It is the parent's responsibility to ensure codes are renewed in time otherwise they may miss out on funding. We also conduct grace period audits twice a term to let you know of any children who have fallen into their grace period and need their code renewing. Parents will be notified of their end date when applying for a code and they should also receive reminders from the Childcare Service to renew their codes. If codes are not applied for / renewed in line with the dates below, we will be unable to fund for the extended/expanded hours unless the grace period applies.

**Important Note Regarding Grace Periods:**

- If a parent does not re-confirm their details by the code end date, they automatically fall into the grace period.
- Where a parent falls into the grace period, the extended/expanded funding can be claimed up until the grace period end date, providing the parent was accessing the extended/expanded hours at your setting in the previous term.
- Where a parent was not accessing the extended/expanded hours at your setting in the previous term, and the child is in their grace period you will be unable to claim for the extended/expanded hours i.e. The code end date is before the start of the term you want to claim for, but the grace period end date is after the start of the term you want to claim for.
- Parents cannot change settings once they have fallen into the grace period, but their code will still be valid until the end of the grace period with the setting that claimed the extended/expanded hours in the previous term.

# 5a. Validating working Family codes

**If you are claiming** the extended/expanded hours for any children, you are required to validate their 11-digit code **every time** the parent applies or renews their code. If you **are not claiming** any extended/expanded hours, then there is no requirement for you to validate the extended/expanded 15 hours eligibility code.

To validate an eligibility code, you must complete all fields marked with an * and then click submit. The mandatory details required are:

- Eligibility code
- Child date of birth
- Parent/carer NI number
- Consent for eligibility check



You will then see a message box which will either confirm that the eligibility code is valid or that the eligibility code is not valid for the extended/expanded hours. You will need to make a note of the result along with the eligibility code start date, end date and grace period end date and check the dates are valid for the term you wish to claim funding for.
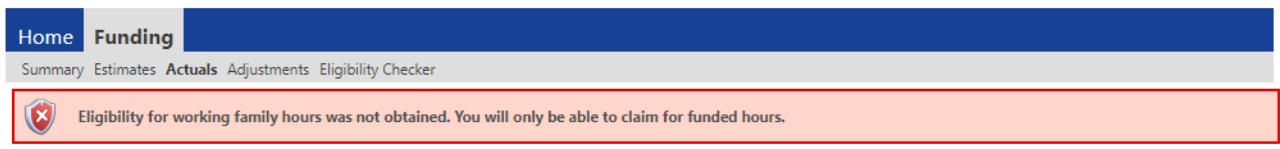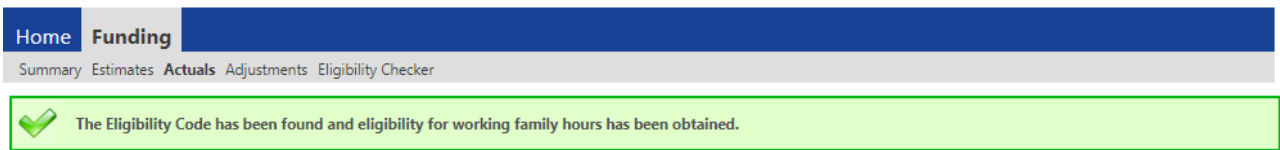




If you receive an eligibility code that returns a result of not eligible, please check that all the details have been input correctly, for example, the parent's details you have input relate to the parent who requested the voucher code via the Childcare Choices website and that the name is spelt correctly, the child's date of birth is correct, and the eligibility code is correct.

For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:



# 5b. Grace period audits

Each term the Local Authority will undertake 2 audits of the Working Family eligibility codes to identify any children who may have fallen into their grace period. All providers will be emailed once the audits have been completed and they will be required to log into the provider portal to check to see if they have any children who have fallen into their grace period.

To view the results of the audit, go to funding, actuals and select the funding type for the current term i.e. 3 & 4 Year Old Funding / 2 Year Old Funding / 9 month – 2 year old funding.



If you have any children who have fallen into the grace period, the yellow warning triangle will be displayed at the top of the page.

To view which children have fallen into the grace period look down the list of your children on the headcount and you will see the yellow warning triangle against each child that is now in the grace period. Further details are included in the Eligibility Status column.



| | Child | Funded Hours (inc Adj) | Extended Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings | Eligibility Status |
|---|---|---|---|---|---|---|
| ⚠ | | 0.00 | 0.00 | £0.00 | | 06-Jun-2023 - 16-Mar-2024 Grace Period: 31-Aug-2024 |

| Name: | DOB: | |
|---|---|---|

Summary | Child Details | Parent / Carer Details | Funding Details

⚠ Child is in grace period

| Term Start Date | 01-Apr-2024 |
|---|---|
| Term End Date | 31-Aug-2024 |
| No of weeks attended | 13.000 |
| Nominated for DAF | No |
| | |
| Eligibility Start Date | 06-Jun-2023 |
| Eligibility End Date | 16-Mar-2024 |
| Grace Period End Date | 31-Aug-2024 |
| Eligibility last checked | 12-Feb-2024 13:3 |
| | |
| ▶ Provider Total Rate | £5.460 |

> You can also view the validity dates of the code by clicking on the child's record and going into their summary tab.

Where a child has fallen into their grace period **you must** notify the parents and explain that as they have now fallen into the grace period, their funding for the extended/expanded hours will cease on the grace period end date, unless the code is renewed. Parents will need to log back on to their Gateway Account to renew their code. If the code is not renewed in time, the child may miss out on the extended/expanded hours.

If parents believe they are still eligible, or if their circumstances change before the end of the noted grace period, please advise them to log back onto their Gateway Account to re-confirm their information. You will also need to agree how long you are prepared to hold the place open for the next term (in case the parent becomes eligible again) or whether the parent wishes to pay for the additional hours over and above their universal entitlement.

For parents to take up a place in the next term, they need to have a valid code issued before the end of the previous term. Deadlines to apply/renew the Working Family codes are as follows:

- 31 August
- 31 March
- 31 December

# 5c. 2-Year-Old working family codes

Where the parents have fallen into the grace period and the family are no longer eligible for the Working Families entitlements, they may qualify for a funded 2-year-old place under the low income/disadvantaged families' criteria (i.e. LCC Golden Ticker EY Voucher code). You should therefore encourage parents to apply via Funded childcare for 2 year olds - Lancashire County Council to see if they are eligible, and if so obtain a Golden Ticket code.

# 6. Estimates

Each term we will invite all providers to submit a revised estimate for the next term's interim payment.

Please note:

- If you do not wish to claim for any children please ensure you submit zero hours estimate otherwise you will be overpaid.
- If you did not submit an actual Headcount in the previous term and fail to submit an online estimate for the new term unfortunately we will not be able to make an interim payment.

# 6a. Submitting your estimates



Click on the Estimates tab and select the relevant academic year, term, and funding type. The submission dates will be shown and if estimates are open you will see a green icon and the Funding Type will have a pencil icon next to it. If there is a red 'no entry' icon, this means estimates is closed and can only be viewed. Click on each of the relevant funding types to add your estimated hours

The estimated number of funded hours for the new term will already be completed, based on the actuals claimed in the previous term, if you made a claim.  If no claim was made or this is your 1st claim the estimates box will be blank.  When submitting your estimates you need to enter the **total number of hours you are claiming for the term for each of the different funding types (i.e. 9 month – 2yo, 2-year-olds and 3&4 year-olds).**

Enter or update the number of hours and click 'Send Claim'. You will then see a green banner with a tick saying, 'submission successful'.



If you need to amend your estimates after submitting them, providing the portal is still open for estimate submissions you will be able to adjust your estimate and resubmit the details to us. **Please note: Once the provider portal is closed for estimate submissions, we are unable to amend your hours.  The updated estimates will only show in your portal once we have imported all submissions.**

# 7. Headcount claims

You will not be able to make a headcount claim until the Provider Portal is open for submissions. All registered EEF providers will receive an email from fee234@lancashire.gov.uk to advise when the Provider Portal is open for headcount claims. Please ensure you read this email as it contains essential information about the children you can claim for and what the submission deadlines are. Before making a claim please check:

- ✓ The child is eligible for a funded place.
- ✓ You have seen proof of the child's date of birth (this must be kept on file)
- ✓ A signed parental agreement is in place - If you do not have a signed Parental Agreement in place, you do not have consent from the parent to make a claim, therefore, you are unable to make a claim for that child.
- ✓ You have a copy of the 2-year-old Golden Ticket Lancashire letter containing the child's EY Voucher code (2-year old eligible children only)
- ✓ You have validated the Working Family eligibility code, and their code is valid for the term i.e. code start date is before the start of term (all eligible children).

# 7a. Completing your headcount claims



Click on the 'Funding' tab on the main menu to enter the Funding section of the Provider Portal.

Select the correct characters in answer to your security question and then click the submit button.



Click on the 'Actuals' tab on the 2nd toolbar.

Select the academic year, then the term you are submitting your claim for and then you will see the funding types available to you.

Please Note - if you cannot see the funding tabs please contact us on FEE234@lancashire.gov.uk

The actuals submission dates will be shown and if the Headcount is open you will see a green icon and the Funding Type will have a pencil icon next to it. If there is a red 'no entry' icon, this means the Headcount is closed and can only be viewed.

- Click on the funding type you wish to complete your headcount for. You will then be shown a pre-populated list of children that have been carried forward from the previous term headcount who are age eligible for the current term. Please note: if you claimed for a new child in the previous term via the supplementary process after we carried forward the term, the child's record will have not been carried forward and therefore you will need to add them to your list of children.

From this screen you will be able to manage your headcount claim as you will need to:

- '**Add**' new child records to your headcount submission.
- '**Edit**' actual attendance hours and weeks for your existing child records.
- '**Delete**' any child records that are no longer required i.e. where the child has left your setting.

Each time you 'Edit', 'Add' or 'Delete' the details of a child record it will be saved in the Provider Portal and you will be able to revisit and make further changes at any time **before the end of the current headcount submission period.**

To switch to the 'actuals' for another funding type i.e. from 9 Month – 2 year funding to 2 year funding or 3&4 year old funding, please click on 'CHANGE' as highlighted below.  This will take you back to the list of Provider Headcount Records, where you can select the relevant year, term and age range.
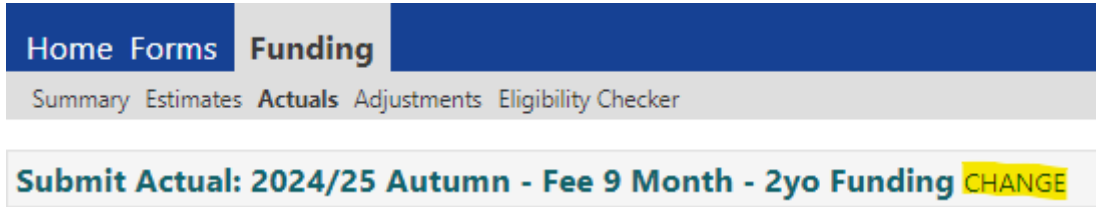


# 7b. Add a 9 month – 2 year old child

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed.  You must work through and complete each tab before you move onto the next tab.  If you do not complete all the * fields, you will not be able to move onto another tab.

**Reminder: Please validate all Working Family Eligibility Codes to ensure they are valid for the term you are making a claim for.**
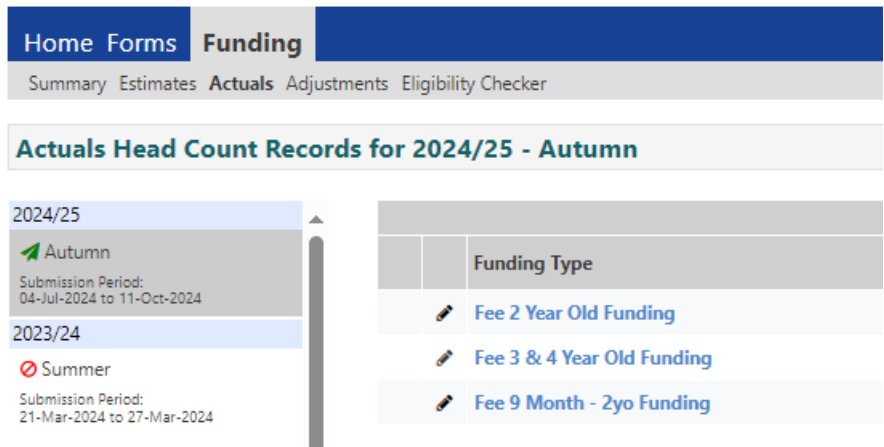


Click on the FEE 9 Month – 2yo Funding type link.



Click on the Add Child button

## On the 'Child Details' tab



## You need to:

- Enter the 'Child's Name'/Date of Birth/Gender – Complete these as per the child's birth certificate. Please note you must claim using the child's legal name.
- Tick 'Proof of DOB' - you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter the 'Preferred Surname' - when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- 'Ethnicity' we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- 'SEN COP Stage'. Please select the relevant code from the drop-down list based on the following.

  - o E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
  - o K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
  - o N – No SEN/EHCP in place

- Enter the 'Child's Address' - enter the child's home postcode and click on the search button, then from the drop-down box select the correct address and click on the confirm button.

If the address cannot be found the following error message will appear at the bottom of the page.

No matches were found. Please check your search criteria and try again or enter address manually.

You will need to check the address and once the correct address has been confirmed try again or enter the address manually. When entering the address manually you will need to enter address line 1 (name/number of house) and the postcode and click on the confirm button.

**On the Parent/Carer Details Tab**

Please note: Entering Parent/Carer details will enable us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for expanded hours.

If you have consent, you must complete this tab otherwise you could miss out on funding.



**You need to:**

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number. You can include their partners details if you wish. Parent details for the main benefit holder should be entered in the boxes on the left-hand side.
- Tick to give consent to Eligibility Checking for:

  - EYPP
  - Working Family Eligibility

* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

## On the Funding Details Tab



**You need to:**

- **Input the attendance start and end dates**. If your term dates match the EEF term dates, as noted in these Guidance Notes, then click on the 'Default Term Dates' button as the dates will then be populated with the standard EEF term dates. However, if they differ, you will need to input the dates using the calendar that appears when you click in the Start Date or End Date box. Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that the 'Term Start Date' and 'Term End Date' are amended to reflect the actual period for which you are claiming.

- **Input the number of weeks to be claimed**. The maximum number of weeks for each term are as follows.

  Autumn       14 weeks
  Spring        11 weeks
  Summer     13 weeks

  Please note: If you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that you amend the number of weeks.

- **Tick the 'Present During Census' box** for **all** children that you are making a claim for, for example, all children that are booked in or planned present during the headcount week.

- **Tick 'Attends Two Days or More' box if the child attends two days or more**. If they do not attend 2 days, then leave this blank. Please note: If this box **is not ticked** when

the child attends two days or more, **you will not be allowed to input more than 10 funded hours per week.**

- **Tick Nominated for DAF** Yes or No radial buttons to reflect the parent's consent for you to claim DAF as per the Parental Agreement.   Please note: You can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Input the Expanded Funded Hours** you are claiming per along with the Eligibility Code, click the blue Check Eligibility Code button which will check the eligibility code.   Please note: If the eligibility code is already displayed and there is a tick in the eligible for Expanded Hours box, you do not need to click the blue Check Eligibility Code.

Once you have done this you will receive a message at the top of the screen.  The example below states 'The Eligibility Code has been found and eligibility for working family hours has been obtained'.  Please note: You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.

| Home | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |
| ✔ The Eligibility Code has been found and eligibility for working family hours has been obtained. | | |

If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.

| Home | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |
| ⊗ Eligibility for working family hours was not obtained. You will only be able to claim for funded hours. | | |

For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:

| Home Forms | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |
| ⊗ The Eligibility Code has been found, but does not cover the standard term start date (01-Sep-2024) therefore working family hours cannot be claimed this term. | | |

- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for.  Enter zero if there are no hours being paid for.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim.  If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**

Number of Weeks: **14.000**

Expanded Weekly Hours: **15.00**
Expanded Termly Hours: **210.00**
Expanded Yearly Hours: **570.00**

**On the Notes Tab**

This is where you can type any notes relating to the child's claim.  Any previous notes will be shown on the right-hand side.



Once you have completed all tabs, click on the **'Save' button** on the bottom left.  If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen.  Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the actuals list.  The child status will now show as New, Unsubmitted Child.  Please double check the funded hours listed are correct as this is what will be submitted to us.  If the funded hours are not correct, please go back into the child's record to edit and save the child's record.

Repeat this process for every child you wish to claim funding for who are present or planned present during the headcount week.

**Once you have finished adding or editing all records, 9 month – 2yo, 2-year-olds and 3 & 4-year-olds click the 'Send Claim' button.  You will get the following message:**



## 7c. Add a 2-year-old child

Please ensure that all mandatory fields, which are marked by a \*, are completed before submission, as failure may result in a delay in your claim being processed.  You must work through and complete each tab before you move onto the next tab.  If you do not complete all the \* fields, you will not be able to move onto another tab.



Click on the FEE 2-Year-Old Funding type link.

## 7d. 2-Year-Old disadvantaged family using EY Voucher Code

**Reminder: You must have a copy of the 2-year-old Lancashire letter containing the child's EY Voucher code or a valid Working Family eligibility code before making a claim.**



Click on the Enter EY Voucher button (this button will be shown at the top and bottom of your screen)

## EY Claim

Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.

Voucher Code*
Child Date of Birth*
Child Surname*

*denotes mandatory fields

**Submit**  **Cancel**

> Enter the EY voucher code as shown on the child's eligibility letter, child's date of birth and surname and click on the Submit button.

**Please note: The details you enter must match the details we have on our system from when the application was made by the parent/carer. If any of these details do not match you will get the following error. If this happens, please contact us so we can verify the information.**

## EY Claim

Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.

Voucher Code*          eh5th
Child Date of Birth*   31/03/2022
Child Surname*         Smith

*denotes mandatory fields

**Submit**  **Cancel**

Once you have clicked on the submit button this should bring up the child's record on the **summary screen** and you can then add the claim details.

| Home | Forms | **Funding** |
| --- | --- | --- |
Summary  Estimates  **Actuals**  Adjustments  Eligibility Checker

**Name:**          **DOB:**

Summary | Child Details | Parent / Carer Details | Funding Details | Notes

| | | | |
| --- | --- | --- | --- |
| **Term Start Date** | 01-Apr-2024 | **Funding** | |
| **Term End Date** | 31-Aug-2024 | Funded Hours Per Week | |
| **No of weeks attended** | | Funded Hours for Term | 0.00 |
| **Nominated for DAF** | | | |
| ▶ **Provider Total Rate** | £7.100 | **Funding Amount @ Provider Rate** | £0.00 |
| | | **Child Weightings** | £0.00 |
| | | **Funding Amount** | £0.00 |
| | | **Totals** | |
| | | Funded Hours Per Week | 0.00 |
| | | Funded Hours for Term | 0.00 |
| | | **Total Funding (excl. Adj)** | £0.00 |
| | | Total amount from Adjustments | £0.00 |
| | | Total amount from Pending Adjustments | £0.00 |
| | | **Total Funding For Term (inc Adj)** | £0.00 |

**Save**  **Cancel**     *denotes mandatory fields

**On the 'Child Details' tab**



The child's name, date of birth, gender and address will already be pre-populated if you have selected the EY Voucher Code. If you are using a Working Family eligibility code you will need to add all the child's details as these will **not** be pre-populated.

**You need to**:

- Tick 'Proof of DOB' - you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter the child's Preferred Surname box (if applicable) - when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- Select the correct Ethnicity - we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- Select the correct SEN COP Stage - Please select the relevant code from the drop-down list based on the following.

  - E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
  - K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
  - N – No SEN/EHCP in place

**On the Parent/Carer Details Tab**



**You need to**:

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number. You can include their partners details if you wish. Parent details for the main benefit holder should be entered in the boxes on the left-hand side.
- Tick to give consent to Eligibility Checking for:

    - EYPP
    - Working Family Eligibility (if applicable)

* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

Please note: Entering Parent/Carer details will enable us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding.

If you have consent, you must complete this tab otherwise you could miss out on funding.

## On the Funding Details Tab



**You need to:**

- **Input the attendance start and end dates**.  If your term dates match the EEF term dates, as noted in these Guidance Notes, then click on the 'Default Term Dates' button as the dates will then be populated with the standard EEF term dates.  However, if they differ, you will need to input the dates using the calendar that appears when you click in the Start Date or End Date box.  Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that the 'Term Start Date' and 'Term End Date' are amended to reflect the actual period for which you are claiming.

- **Input the number of weeks in term.** The maximum number of weeks for each term are as follows.

  | | |
  |---|---|
  | Autumn | 14 weeks |
  | Spring | 11 weeks |
  | Summer | 13 weeks |

  Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that you amend the number of weeks.

- **Tick the 'Present During Census' box.**  For all children that you are making a claim for, for example, all children that are booked in or planned present during the headcount week.

- **Tick 'Attends Two Days or More' box.** If the child attends two days or more. If they do not attend 2 days, then leave this blank. Please note: that if this box is not ticked when the child attends two days or more, you will not be allowed to input more than 10 funded hours per week (See maximum values allowed box point 7).

- **Tick Nominated for DAF.** Yes or No radial buttons to reflect the parent's authority for you to claim DAF as per the Parental Agreement. Please note: you can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Funding Types - Disadvantaged Funding (Funded Hours):** If you have entered an EY Voucher code (6 digit LCC golden ticket code), 'Disadvantaged Funding' button will be automatically be selected. You must now enter the number of funded hours you wish to claim.

| Funding Type* | ⦿ Disadvantaged Funding |
| | ○ Working Family Funding |

**Funded Hours per Week**

Hours* [                    ]

- **Input the number of Funded Hours** you are claiming per week (maximum 15 Funded hours per week).

- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for. Enter zero if there are no hours being paid for.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**
Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

**On the Notes Tab**

This is where you can type any notes relating to the child's claim. Any previous notes will be shown on the right-hand side. Please note: If you have added the child without the EY voucher code then you must include the EY voucher (golden ticket code) in the notes section of the child's record so that we can process the claim.

**DO NOT ENTER THE WORKING FAMILY ELIGIBLITY CODE IN THIS SECTION.**

Once you have completed all tabs, click on the **'Save' button** on the bottom left. If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen. Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the actuals list. The child status will now show as Unsubmitted Claim / New, Unsubmitted Child. Please double check the funded hours listed are correct as this is what will be submitted to us. If the funded hours are not correct, please go back into the child's record to edit and save the child's record.

# 7e. 2-Year-Old Working Family using Working Family Code (Expanded Hours)



Click on the Add Child button (this button will be shown at the top and bottom of your screen)

If you have a Working Family Funding code click the 'Working Family Funding' button. You will then be presented with the Expanded Hours options.

- **Input the Expanded Funded Hours** you are claiming per along with the Eligibility Code, click the blue Check Eligibility Code button which will check the eligibility code. Please note if the eligibility code is already displayed and there is a tick in the eligible for Expanded Hours box, you do not need to click the blue Check Eligibility Code.

- Once you have done this you will receive a message at the top of the screen. The example below states 'The Eligibility Code has been found and eligibility for expanded hours has been obtained' Please note: - You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.

| Home | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |

✔ The Eligibility Code has been found and eligibility for working family hours has been obtained.

For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:

| Home | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |

❌ The Eligibility Code has been found, but does not cover the standard term start date (01-Apr-2024) therefore working family hours cannot be claimed this term. You may only claim for funded hours.

- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for. Enter zero if there are no hours being paid for.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**
Number of Weeks: **13.000**

Expanded Weekly Hours: **15.00**
Expanded Termly Hours: **195.00**
Expanded Yearly Hours: **570.00**

If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.

| Home | Funding | |
|---|---|---|
| Summary Estimates **Actuals** Adjustments Eligibility Checker | | |

❌ Eligibility for working family hours was not obtained. You will only be able to claim for funded hours.

Click Save.  You will be returned to the first Actuals screen.  Repeat this process for every child you wish to claim funding for who are present or planned present during the headcount week.

**You can <u>ONLY</u> claim for either Expanded or Funded hours, <u>not both</u> – Ensure that you do not exceed the termly maximum hours per child.**



**Once you have finished adding or editing all records, 9 month – 2 year olds, 2-year-olds and 3 & 4-year- olds click the 'Send Claim' button.**

# 7f. Add a 3 & 4-year-old child

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed.  You must work through and complete each tab before you move onto the next tab.  If you do not complete all the * fields, you will not be able to move onto another tab.

**Reminder: Please validate all Working Family Eligibility Codes to ensure they are valid for the term you are making a claim for.**



Click on the FEE 3&4-Year-Old Funding type link.



Click on the Add Child button

## On the 'Child Details' tab



## You need to:

- Enter the 'Child's Name'/Date of Birth/Gender – Complete these as per the child's birth certificate. Please note you must claim using the child's legal name.
- Tick 'Proof of DOB' - you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter the 'Preferred Surname' - when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- 'Ethnicity' we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- 'SEN COP Stage'. Please select the relevant code from the drop-down list based on the following.

  - E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
  - K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
  - N – No SEN/EHCP in place

- Enter the 'Child's Address' - enter the child's home postcode and click on the search button, then from the drop-down box select the correct address and click on the confirm button.

If the address cannot be found the following error message will appear at the bottom of the page.

No matches were found. Please check your search criteria and try again or enter address manually.

You will need to check the address and once the correct address has been confirmed try again or enter the address manually.  When entering the address manually you will need to enter address line 1 (name/number of house) and the postcode and click on the confirm button.

**On the Parent/Carer Details Tab**

Please note: Entering Parent/Carer details will enable us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended hours.

If you have consent, you must complete this tab otherwise you could miss out on funding.



**You need to:**

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number.  You can include their partners details if you wish.  Parent details for the main benefit holder should be entered in the boxes on the left-hand side.
- Tick to give consent to Eligibility Checking for:

    o EYPP
    o Working Family Eligibility (if applicable)

\* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

## On the Funding Details Tab

| Home | Forms | **Funding** | |

Summary | Estimates | **Actuals** | Adjustments | Eligibility Checker

Child Details | Parent / Carer Details | **Funding Details** | Notes

**Funding Details**

| Field | | **Attendance Days** | |
|---|---|---|---|
| Start Date* | [    ] | Attends Monday | ○ Yes ○ No |
| End Date* | [    ] | Attends Tuesday | ○ Yes ○ No |
| | **Default Term Dates** | Attends Wednesday | ○ Yes ○ No |
| Weeks Attended in Term* | [    ] | Attends Thursday | ○ Yes ○ No |
| | | Attends Friday | ○ Yes ○ No |
| Present during Census | ☐ | Attends Saturday | ○ Yes ○ No |
| Attends Two Days or More | ☐ | Attends Sunday | ○ Yes ○ No |
| Nominated for DAF* | ○ Yes ○ No | | |

**Funded Hours per Week**

Hours* [    ]

**Non-Funded Hours per Week**

Non-Funded Hours* [    ]

ⓘ if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer

**Extended Funded Hours per Week**

Extended Hours* [    ]

Eligibility Code [    ]

**Check Eligibility Code**

Eligibile for Extended Hours ☐

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Funded Weekly Hours: **10.00**
Funded Termly Hours: **130.00**
Funded Yearly Hours: **520.00**

Extended Weekly Hours: **10.00**
Extended Termly Hours: **130.00**
Extended Yearly Hours: **520.00**

**Total Funded Hours per Week**

Total Funded: [    ]

**Save**  **Cancel**     *denotes mandatory fields

## You need to:

- **Input the attendance start and end dates**. If your term dates match the EEF term dates, as noted in these Guidance Notes, then click on the 'Default Term Dates' button as the dates will then be populated with the standard EEF term dates. However, if they differ, you will need to input the dates using the calendar that appears when you click in the Start Date or End Date box. Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that the 'Term Start Date' and 'Term End Date' are amended to reflect the actual period for which you are claiming.

- **Input the number of weeks to be claimed**. The maximum number of weeks for each term are as follows.

  | | |
  |---|---|
  | Autumn | 14 weeks |
  | Spring | 11 weeks |
  | Summer | 13 weeks |

  Please note: If you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that you amend the number of weeks.

- **Tick the 'Present During Census' box** for **all** children that you are making a claim for, for example, all children that are booked in or planned present during the headcount week.

- **Tick 'Attends Two Days or More' box if the child attends two days or more**. If they do not attend 2 days, then leave this blank. Please note: If this box **is not ticked** when the child attends two days or more, **you will not be allowed to input more than 10 funded hours per week.**

- **Tick Nominated for DAF** Yes or No radial buttons to reflect the parent's consent for you to claim DAF as per the Parental Agreement. Please note: You can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Input the Funded Hours (Universal)** you are claiming per week.
- **Input the Extended Funded Hours** you are claiming per along with the Eligibility Code, click the blue Check Eligibility Code button which will check the eligibility code.  Please note: If the eligibility code is already displayed and there is a tick in the eligible for Extended Hours box, you do not need to click the blue Check Eligibility Code.

If you are not claiming any extended hours you will need to enter zero.

Once you have done this you will receive a message at the top of the screen. The example below states 'The Eligibility Code has been found and eligibility for working family hours has been obtained'.  Please note: You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.



If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.



For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:



- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for.  Enter zero if there are no hours being paid for.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim.  If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**
Number of Weeks: **13.000**

Funded Weekly Hours: **10.00**
Funded Termly Hours: **130.00**
Funded Yearly Hours: **520.00**

Extended Weekly Hours: **10.00**
Extended Termly Hours: **130.00**
Extended Yearly Hours: **520.00**

**Maximum Values Allowed:**
Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

Extended Weekly Hours: **15.00**
Extended Termly Hours: **195.00**
Extended Yearly Hours: **570.00**

- The combined Extended and Funded (Universal) hours will then show in the Total Funded Hours per Week.  Ensure that you **do not** exceed the termly maximum hours per child.

**On the Notes Tab**

This is where you can type any notes relating to the child's claim.  Any previous notes will be shown on the right-hand side.



Once you have completed all tabs, click on the **'Save' button** on the bottom left.  If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen.  Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the actuals list.  The child status will now show as New, Unsubmitted Child.  Please double check the funded hours listed are correct as this is what will be submitted to us.  If the funded hours are not correct, please go back into the child's record to edit and save the child's record.

Repeat this process for every child you wish to claim funding for who are present or planned present during the headcount week.

**Once you have finished adding or editing all records, for 9 month – 2 year olds, 2-year-olds and 3 & 4-year-olds click the 'Send Claim' button.  You will get the following message:**



# 7g. Edit an existing child's record

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed.  You must work through and complete each tab before you move onto the next tab.  If you do not complete all the * fields, you will not be able to move onto another tab.

Your headcount form for the new term will be pre-populated with the details of children submitted in the previous term, who remain age eligible.  The funded hours, funding amount and child weightings for existing children will be blank**. You must 'Edit' all records for existing children to either update their claim to the relevant term or delete their record.**  Please note if you claimed for a new child in the previous term via the supplementary process after we carried forward the term, the child's record will have not been carried forward and therefore you will need to add them to your list of children.



From your list of pre-populated children click on the child's name whose record you wish to edit.

The child's record will open on their summary screen.  If the child is in receipt of the extended/expanded hours their validity start and end dates of the code will show.  The 'Summary' tab will also show if your setting is nominated for the DAF payment, if the child is eligible for DAF.

## On the 'Child Details' tab



Please note: if you are amending the child's date of birth you will be required to submit a copy of the child's birth certificate or passport to fee234@lancashire.gov.uk as evidence of the change before the amendment will be accepted by LCC.

## On the Parent/Carer Details tab

Please note: Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended/expanded hours.  If you have consent you must complete this tab otherwise you could miss out on funding.



Check all details are correct and amend if necessary.

**On the Funding Details tab**



Check all details are correct and amend if necessary.

**You need to:**

- **Input the attendance start and end dates**. If your term dates match the EEF term dates, as noted in these Guidance Notes, then click on the 'Default Term Dates' button as the dates will then be populated with the standard EEF term dates. However, if they differ, you will need to input the dates using the calendar that appears when you click in the Start Date or End Date box. Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that the 'Term Start Date' and 'Term End Date' are amended to reflect the actual period for which you are claiming.

- **Input the number of weeks to be claimed**. The maximum number of weeks for each term are as follows.

  Autumn      14 weeks
  Spring      11 weeks
  Summer      13 weeks

  Please note: If you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that you amend the number of weeks.

- **Tick the 'Present During Census' box** for **all** children that you are making a claim for, for example, all children that are booked in or planned present during the headcount week.

- **Tick 'Attends Two Days or More' box if the child attends two days or more**. If they do not attend 2 days, then leave this blank. Please note: If this box **is not ticked** when the child attends two days or more, **you will not be allowed to input more than 10 funded hours per week.**

- **Tick Nominated for DAF** Yes or No radial buttons to reflect the parent's authority for you to claim DAF as per the Parental Agreement.   Please note: You can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Input the Working Family Hours** you are claiming per week along with the Working Parent's eligibility code, click the blue Check Eligibility Code blue button which will check the eligibility code.  Please note if the eligibility code is already displayed and there is a tick in the eligible for Working Family Funding box, you do not need to click the blue Check Eligibility Code button.

If you are not claiming any working family (extended/expanded) hours you will need to enter zero.

Once you have done this you will receive a message at the top of the screen.  The example below states 'The Eligibility Code has been found and eligibility for working family hours has been obtained' Please note: - You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.



If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.



For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

**Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:**



- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.
- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for.
- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

- For 9 month – 2 year old children the expanded hours will then show in the Total Funded Hours per week.

**Maximum Values Allowed:**

Number of Weeks: **14.000**

Expanded Weekly Hours: **15.00**
Expanded Termly Hours: **210.00**
Expanded Yearly Hours: **570.00**

- For 2-year-old children the funded/expanded hours will then show in the Total Funded Hours per week.

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Expanded Weekly Hours: **15.00**
Expanded Termly Hours: **195.00**
Expanded Yearly Hours: **570.00**

- For 3 & 4-year-old children the combined extended and funded hours will then show as Total Funded Hours per Week.

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Funded Weekly Hours: **10.00**
Funded Termly Hours: **130.00**
Funded Yearly Hours: **520.00**

Extended Weekly Hours: **10.00**
Extended Termly Hours: **130.00**
Extended Yearly Hours: **520.00**

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

Extended Weekly Hours: **15.00**
Extended Termly Hours: **195.00**
Extended Yearly Hours: **570.00**

- Ensure that you **do not** exceed the termly maximum hours per child.

**On the Notes Tab**

This is where you can type any notes relating to the child's claim.  Any previous notes will be shown on the right-hand side.

Once you have completed all tabs, click on the **'Save' button** on the bottom left.  If you have any errors when trying the save your record you will get a notification that the record cannot be saved,

and the errors will be listed in red at the bottom of the screen.  Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the actuals list.  The child status will now show as Unsubmitted claim.  Please double check the funded hours listed are correct as this is what will be submitted to us.  If the funded hours are not correct, please go back into the child's record to edit and save the child's record.

**Submit Actual: 2023/24 Summer - Fee 3 & 4 Year Old Funding** CHANGE

| | | Status | Child | Funded Hours (inc Adj) | Extended Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings | Eligibility Status |
|---|---|---|---|---|---|---|---|---|
| ❗ | ↩ | Awaiting LA Deletion | Mouse, Mickey (11-Aug-2020) | 0.00 | 0.00 | £0.00 | | |

Repeat this process for every child you wish to claim funding for who are present or planned present during the headcount week.

**Once you have finished adding or editing all records, for 9 month – 2 year olds, 2-year-olds and 3 & 4-year-olds click the 'Send Claim' button.**

# 7h. Delete a child's record
You must delete all children that no longer attend your setting.

Please note: you will only be able to request to delete children when the provider portal is open for headcount submissions.

| Home Forms **Funding** | | Click on the funding tab, then click on actuals and select year/term and funding type you require. |
|---|---|---|

Summary  Estimates  **Actuals**  Adjustments  Eligibility Checker

**Actuals Head Count Records for 2024/25 - Autumn**

| 2024/25 | | |
|---|---|---|
| ✈ Autumn | | **Funding Type** |
| Submission Period: 04-Jul-2024 to 11-Oct-2024 | | ✏ Fee 2 Year Old Funding |
| 2023/24 | | ✏ Fee 3 & 4 Year Old Funding |
| 2022/23 | | ✏ Fee 9 Month - 2yo Funding |
| 2021/22 | | |
| 2020/21 | | |

You will then be shown a pre-populated list of children that have been carried forward from the previous term headcount, who are age eligible for the current term.

| | Status | Child | Funded Hours (inc Adj) | Extended Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings | Eligibility Status | Click on the 'request delete' icon (shown in the column before the status column ✕ ) to remove. |
|---|---|---|---|---|---|---|---|---|
| ✕ | | Mouse, Mickey (11-Aug-2020) | 195.00 | 0.00 | £1054.95 | | | |

To confirm the deletion request, click on the 'Yes' button.

Once you have clicked 'Yes' you will be returned to the list of actuals and the child's status will have changed to 'Awaiting LA Deletion'. Your request to remove the child's record has been submitted to the Early Education Funding Team. The record will be removed once the team have fully processed your claim.



Repeat this process for every child you wish to delete from your headcount claim.

# 7i. Undo a deletion request

If you accidently request to remove a child from your headcount claim, you can undo the request providing the portal is still open and we have not already removed the child's record.



Click on the 'cancel delete' icon (shown in the column before the status column ↶) to cancel.

You will then be returned to the list of children on your headcount, where you can see that the status of the child is blank. You will then need to 'edit' the child record and input the hours/weeks of attendance that you are claiming for.



To confirm the cancellation request, click on the 'Yes' button.

# 7j. Submitting your headcount claims

Once you have completed your headcount claim, please double check the list of actuals before sending your claim as this is what will be submitted to us. You are ready to submit your headcount return once you have:

- ✓ Added new child records and attendance hours/weeks.
- ✓ Reviewed existing children and updated their hours of attendance/weeks.
- ✓ Requested the removal of any child records which are not required.
- ✓ Completed all the relevant information, for an EYPP check to be actioned, where applicable.

Reminder: If you are claiming EYYP / DAF please ensure you have completed all the required information where applicable so that we can process your additional payments.



To submit your claim click on the 'Send Claim' button, which is located on the 'Actuals' page.

Once you have clicked on send claim, if there are any children with zero hours on your submission you will get a warning message. If you are not claiming for these children then you will need to return to your headcount delete their record.



Once submitted you will get a message at the **top of screen** as below, this message will only show at the top of the screen, therefore, if your list of children is long, you may not see this and you will need to scroll to the top of the page.

Once you have submitted your claim, you can view the current headcount to ensure that all children have hours showing where a claim is being made and their status has updated to one of the following.

- New, awaiting LA download (for new children)
- Awaiting LA download (children who have been edited)
- Awaiting LA deletion (deleted children)

If the Status does not show any of the above and the child hours are zero, this means that you have not submitted the record and you will need to go back into the record and edit the hours/weeks and then click the 'Send Claim' button again.

Once we have processed your headcount claim the child status will be blank.

Please note the following:

- We recommend that once you have submitted your headcount claim you take a copy of your headcount claim, showing the 'submission successful' message along with printing your actual headcount claim.
- You can submit your headcount claim at any point during the headcount submission period. If you realise that you have missed a child off or made a mistake on a child's hours/weeks, missed EYPP information or if circumstances change, you can simply re-edit the relevant child records as many times as necessary and **you must** then click the 'Send Claim' button before the end of the headcount submission period.
- Errors or omissions in your headcount claim can result in delays in processing your claims. Please ensure any queries are responded to in a timely manner.
- If you miss the headcount submission deadline totally, you will be contacted by the EEF Team to discuss. This will mean your balancing payment could be delayed.

# 7k. Unsubmitted records

Once you have submitted your claim, please check for any children that have a status of unsubmitted claim.

- If the provider portal is still open for headcount submissions the child status will show as unsubmitted claim. If it was your intention to submit a claim for the child you need to check your claim to ensure it is correct and then click on the send claim button.

- If the provider portal has closed for headcount submissions you will see a red exclamation mark, which when you scroll over with your mouse will display a unsubmitted claim message. You will not have the option to send the claim to us and you will need to wait until the provider portal re-opens for supplementary claims. As part of our headcount checks we do email those providers that have unsubmitted records on their headcount. Further details on what to do next will be included in the email.



Once the provider portal has reopened for supplementary claims, when you log in to the provider portal your home screen will show a notification regarding the unsubmitted claim. Click upon the term and funding type notification, you will then be asked to enter your security questions.



Once you have entered your security question, you will be taken to the unsubmitted record. As you now must submit this claim via the supplementary process you need to click on **adjustments** from the toolbar at the top of your screen. The status box will show unsubmitted actuals claim. As per the blue message box 'where the status indicates new unsubmitted actuals child or unsubmitted actuals claim' the edit must be undone.

To undo the claim click on the undo icon.

A pop-up box will then appear and ask you to confirm if you want to undo the pending changes for the child.  Click yes to undo the changes and then you will need to enter your claim again by following the instructions on submitting supplementary claims.  If you are experiencing any errors when attempting to do this, please contact the EEF team for further help.



# 7l. Taking a copy of your claims

We recommend you take a copy of your submitted claim once you have submitted it, so you have a record of what was submitted to us. There are several ways to take a copy of your claim.

- Printing your claim – whilst on the screen you want to print the Ctrl and P keys on your keyboard at the same time and  press select your printing options.

- Take a 'snip' of your claim – For this you will need to use the windows snipping tool App. To search for the snipping tool, press the windows button on your keyboard, followed by the S key. Click on the Snipping Tool App to open.
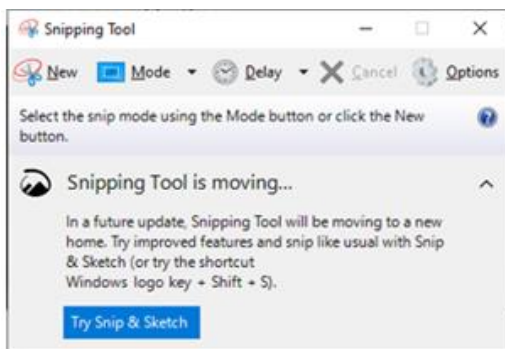




The 'Snipping Tool' box will open, click on 'New' from the taskbar and your screen will go grey.  Whilst holding the left mouse button down, drag the curser around the area you want to copy, the area will have a red box around it.  When you let go of your mouse a snip of the area will appear and you can copy and paste this into a word document.

- Take a 'Print Screen' of your claim – Click on the screen you want to take a print screen off and press then Print Screen button on your keyboard. Open a word document, right click on your mouse, and click paste.



# 8. Supplementary claims

You will not be able to make a supplementary claim until the Provider Portal is open for submissions.  All registered EEF providers will receive an email from fee234@lancashire.gov.uk to advise when the Provider Portal is open for supplementary claims.  Please ensure you read this email as it contains essential information about the children you can claim for and what the submission deadlines are.

Supplementary claim should only be made for:
- Children who have started with you after the headcount week. (Providing a child has not used all their entitlement at another setting in the term).
- Children who have increased their hours of attendance since the headcount date.  You can only claim the additional hours from the date the hours of attendance increased, for the remaining weeks in the term.
- **If you are updating details ensure you add details to the notes tab explaining what the supplementary claim is being submitted for – do not submit a blank claim.**

Before making a claim please check:
- ✓ The child is age eligible for a funded place.
- ✓ A signed parental agreement is in place - If you do not have a signed Parental Agreement in place you do not have consent from the parent to make a claim.  Also, you must keep on record proof of the child's date of birth e.g. copy of birth certificate/passport.
- ✓ You have validated the Working Family eligibility code, and their code is valid for the term i.e. code start date is before the start of term (Eligible 9 month- 2 Years, 2-year-old children and 3&4 year old children).
- ✓ You have a copy of the 2-year-old golden ticket Lancashire letter containing the child's EY voucher code (Eligible 2-year-old children only).
- ✓ The child has started with you, **we cannot accept** post-dated claims.
- ✓ If the child has been at attendance with another setting in the term and if there are any hours remaining as we will be unable to fund any additional hours if the maximum hours have been claimed.

Please note: if you are wanting to reduce the hours your setting has already claimed for a child on the headcount claim, you should contact the EEF team to discuss how to correct this.

# 8a. Completing your supplementary claims

Supplementary claims are made via the **Adjustments tab** in the Provider Portal.



Click on the 'Funding' tab on the main menu to enter the Funding section of the Provider Portal.

Select the correct characters in answer to your security question and then click the submit button.

Click on the 'adjustments' tab on the 2nd toolbar.

Select the academic year, then the term you are submitting your claim for and then you will see the funding types available to you.

Please Note - if you cannot see the funding tabs please contact us.

The adjustments submission dates will be shown and if the provider portal is open for adjustments you will see a green icon and the Funding Type will have a pencil icon next to it. If there is a red 'no entry' icon and you get the following message when you click on the terms this means the provider portal is closed for adjustments.



# 8b. Add a new 9 month - 2-year-old supplementary claim

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed. You must work through and complete each tab before you move onto the next tab. If you do not complete all the * fields, you will not be able to move onto another tab.



Click on Funding > Adjustments. Select the year/term from the menu on the left-hand side and then select the FEE 9 Month – 2yo funding type link.

## On the 'Child Details' tab



**You need to:**

- Enter the 'Child's Name'/Date of Birth/Gender – Complete these as per the child's birth certificate. Please note you must claim using the child's legal name.
- Tick 'Proof of DOB' - you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter the 'Preferred Surname' - when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- 'Ethnicity' we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- 'SEN COP Stage'. Please select the relevant code from the drop-down list based on the following.

  - E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
  - K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
  - N – No SEN/EHCP in place

- Enter the 'Child's Address' - enter the child's home postcode and click on the search button, then from the drop-down box select the correct address and click on the confirm button.

If the address cannot be found the following error message will appear at the bottom of the page.

No matches were found. Please check your search criteria and try again or enter address manually.

You will need to check the address and once the correct address has been confirmed try again or enter the address manually. When entering the address manually you will need to enter address line 1 (name/number of house) and the postcode and click on the confirm button.

**On the Parent/Carer Details Tab**

Please note: Entering Parent/Carer details will enable us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for expanded hours.

If you have consented, you must complete this tab otherwise you could miss out on funding.



**You need to:**

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number. You can include their partners details if you wish. Parent details for the main benefit holder should be entered in the boxes on the left-hand side.
- Tick to give consent to Eligibility Checking for:

  - EYPP
  - Working Family Eligibility

* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

**On the Funding Details Tab**

Please note: Some of the fields on this tab are greyed out and you cannot complete them. Any hours you wish to claim via the supplementary process need to be entered on the pending adjustments tab.



**You need to:**

- **Input the attendance start and end dates**. The start and end dates should reflect the number of weeks you are claiming for on your supplementary claim.

- **Tick 'Attends Two Days or More' box if the child attends two days or more**. If they do not attend 2 days, then leave this blank. Please note that if this box **is not ticked** when the child attends two days or more, **you will not be allowed to input more than 10 funded hours per week.**

- **Tick Nominated for DAF** Yes or No radial buttons to reflect the parent's authority for you to claim DAF as per the Parental Agreement. Please note you can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Input the Working Parent's Eligibility code (only if you are claiming for extended Hours).** Then click the blue Check Eligibility Code button which will check the eligibility code. Please note if the eligibility code is already displayed and there is a tick in the eligible for Extended Hours box, you do not need to click the blue Check Eligibility Code button. If you are not claiming any extended hours you do not need to complete this field.

- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**
Number of Weeks: **14.000**

Expanded Weekly Hours: **15.00**
Expanded Termly Hours: **210.00**
Expanded Yearly Hours: **570.00**

Once you have done this you will receive a message at the top of the screen. The example below states 'The Eligibility Code has been found and eligibility for extended hours has been obtained'

Please note: You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.

Home  Forms  **Funding**
Summary  Estimates  Actuals  **Adjustments**  Eligibility Checker

✔  The Eligibility Code has been found and eligibility for working family hours has been obtained.

If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.

Home  Forms  **Funding**
Summary  Estimates  Actuals  **Adjustments**  Eligibility Checker

❌  Eligibility for working family hours was not obtained. You will only be able to claim for funded hours.

For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:

Home  Forms  **Funding**
Summary  Estimates  Actuals  **Adjustments**  Eligibility Checker

❌  The Eligibility Code has been found, but does not cover the standard term start date (01-Apr-2024) therefore working family hours cannot be claimed this term. You may only claim for funded hours.

**On the Pending Adjustments tab**



- **Number of Expanded hours -** From the drop-down box select more hours. You must not enter less hours as this would indicate you wish to reduce the number of hours.
- **Total number of Expanded hours –** Enter the **TOTAL** number of funded hours you are making a claim for not the number of hours per week.
- **Reason –** In this box you **MUST** confirm the following information for **ALL** claims. If this information is missing we will be unable to process your claim.

  - **EEF start date –** enter the date child started
  - **Hours per week –** enter the number of hours per week you are claiming
  - **Weeks per term –** enter the number of weeks per term you are claiming.

**On the Notes Tab**
This is where you can type any notes relating to the child's claim any previous notes will be shown on the right-hand side.

Once you have completed all tabs, click on the **'Save' button** on the bottom left. If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen. Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the adjustments list. The child status will now show as Unsubmitted Claim. Please double check the funded hours listed are correct as this is what will be submitted to us. If the funded hours are not correct, please go back into the child's record to edit and save the child's record.



Repeat this process for every child you wish to claim funding for who are present or planned present during the headcount week.

**Once you have finished adding or editing all records, 9 month – 2yo, 2-year-olds and 3 & 4-year-olds click the 'Send Claim' button. You will get the following message:**

# 8c. Add a new 2-year-old supplementary claim

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed. You must work through and complete each tab before you move onto the next tab. If you do not complete all the * fields, you will not be able to move onto another tab.

**Reminder: You must have a copy of the 2-year-old Lancashire letter containing the child's EY voucher code or a valid Working Family Eligibility code before making a claim.**

Click on Funding > Adjustments. Select the year/term from the menu on the left-hand side and then select the FEE 2 funding type link.

## Disdvantaged Funding – Add Child

Click on the Enter EY Voucher button (this button will be shown at the top and bottom of your screen).

Enter the EY voucher code as shown on the child's eligibility letter, child's date of birth and surname and click on the Submit button.

Please note: The details you enter must match the details we have on our system from when the application was made by the parent/carer. If any of these details do not match you will get the following error. If this happens please contact us so we can verify the information.

**EY Claim**

Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.

| | |
|---|---|
| Voucher Code* | eh5th |
| Child Date of Birth* | 31/03/2020 |
| Child Surname* | Smith |

*denotes mandatory fields

Submit    Cancel

Once you have clicked on the submit button this should bring up the child's record on the **pending adjustments screen** and you can then add the claim details.

## Add 2-Year-Old working family using working family code

Home  Forms  **Funding**

Summary  Estimates  Actuals  **Adjustments**  Eligibility Checker

**Submit Actual: 2023/24 Summer - Fee 2 Year Old Funding** CHANGE

Add Child    Enter EY Voucher    Send Claim

Add Child    Enter EY Voucher    Send Claim

Click on the Add Child button (this button will be shown at the top and bottom of your screen)

**On the Child Details tab**

Home  Forms  **Funding**

Summary  Estimates  Actuals  **Adjustments**  Eligibility Checker

Child Details | Parent / Carer Details | Funding Details | Pending Adjustment | Notes

**Child Details**

| | |
|---|---|
| Forename* | Harry |
| Middle Name | |
| Surname* | Potter |
| DOB* | 13-Jun-2021 |
| Proof of DOB | ☑ |
| Gender* | ☑ Male ☐ Female |
| Preferred Surname | |
| Ethnicity* | Aban Asian/asian British Bang ∨ |
| SEN COP Stage* | N No Special Educational Nee ∨ |

Update Address

**Address**

| | |
|---|---|
| Address Line 1* | Fairfield Childrens Centre |
| Address Line 2 | Fairfield Street |
| Address Line 3 | |
| Locality | |
| Town | Accrington |
| County | |
| Postcode* | BB5 0LD |

Save    Cancel        *denotes mandatory fields

The child's name, date of birth, gender and address will already be pre-populated if you have selected the EY Voucher Code.  If you are using a Working Families code you will need to add all the child's details as these will not be pre-populated.

**You need to**:

- Tick 'Proof of DOB' - you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter the child's Preferred Surname box (if applicable) - when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- Select the correct Ethnicity - we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- Select the correct SEN COP Stage - Please select the relevant code from the drop-down list based on the following.

- o E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
- o K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
- o N – No SEN/EHCP in place

## On the Parent/Carer Details tab



## You need to:

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number. You can include their partners details if you wish. Parent details for the main benefit holder should be entered in the boxes on the left-hand side.

* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

## On the Funding Details Tab

**You need to:**

- **Input the attendance start and end dates**. If your term dates match the EEF term dates, as noted in these Guidance Notes, then click on the 'Default Term Dates' button as the dates will then be populated with the standard EEF term dates. However, if they differ, you will need to input the dates using the calendar that appears when you click in the Start Date or End Date box. Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that the 'Term Start Date' and 'Term End Date' are amended to reflect the actual period for which you are claiming.

- **Input the number of weeks in term.** The maximum number of weeks for each term are as follows.

  Autumn       14 weeks
  Spring         11 weeks
  Summer      13 weeks

  Please note: if you are claiming the notice period for a child who is leaving your setting / claiming for a child that has started part way the term you must ensure that you amend the number of weeks.

- **Tick the 'Present During Census' box.** For all children that you are making a claim for, for example, all children that are booked in or planned present during the headcount week.

- **Tick 'Attends Two Days or More' box.** If the child attends two days or more. If they do not attend 2 days, then leave this blank. Please note: that if this box is not ticked when the child attends two days or more, you will not be allowed to input more than 10 funded hours per week (See maximum values allowed box point 7).

- **Tick Nominated for DAF.** Yes or No radial buttons to reflect the parent's authority for you to claim DAF as per the Parental Agreement. Please note: you can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- **Input the number of Non-Funded Hours per Week** which are the additional hours that the parent is paying for. Enter zero if there are no hours being paid for.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**Maximum Values Allowed:**

Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

# 8d. 2-year-old Disadvantaged Funding Adjustments



**On the Pending Adjustments tab you need to add:**

- **Number of hours -** From the drop-down box select more hours.  You must not enter less hours as this would indicate you wish to reduce the number of hours.
- **Total number of hours** – Enter the TOTAL number of hours you are claiming for the term, not the number of hours per week.
- **Reason –** In this box you MUST confirm the following information for ALL claims. If this information is missing we will be unable to process your claim.

    - **EEF start date –** enter the date child started
    - **Hours per week –** enter the number of hours per week you are claiming
    - **Weeks per term –** enter the number of weeks per term you are claiming

- The red box shows how many funded hours are available in a term. This box will change depending on your claim.  If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.



*For example - You have a new starter whose EEF placement date is 03/07/2024 and the child is attending for 15 Funded hours for 9 weeks in the term, total of 135 hours.  The adjustment claim will need to be completed as follows:*

**On the Notes Tab**

This is where you can type any notes relating to the child's claim. Any previous notes will be shown on the right-hand side. Please note: If you have added the child without the EY voucher code then you must include the EY voucher (golden ticket code) in the notes section of the child's record so that we can process the claim. **DO NOT ENTER THE WORKING FAMILY ELIGIBLITY CODE IN THIS SECTION.**



# 8e. Add a new 3 & 4-year-old supplementary claim

Please ensure that all mandatory fields, which are marked by a *, are completed before submission, as failure may result in a delay in your claim being processed. You must work through and complete each tab before you move onto the next tab. If you do not complete all the * fields, you will not be able to move onto another tab.

Reminder: Please validate all Eligibility Codes to ensure they are valid for the term you are making a claim for.

Click on the FEE 3 & 4-Year-Old Funding type link



Click on add child.

Once you have clicked on the add child button this should bring up the child's record on the **child details screen** and you can then add the claim details.

## On the 'Child Details' tab



**You need to:**

- Enter Child's Name'/Date of Birth/Gender – Complete these as per the child's birth certificate. Please note you must claim using the child's legal name.
- Tick Proof of DOB you are required to keep on file a copy of the date of birth evidence that you have seen, example the child's birth certificate or passport.
- Enter Preferred Surname when claiming funding you must use the child's legal surname, if the child has a preferred surname you can enter it in this box.
- Enter Ethnicity we are required by the Department for Education (DfE) to collate this information. Please select the relevant ethnicity from the drop-down box.
- Enter SEN COP Stage. Please select the relevant code from the drop-down list based on the following.

- E – Education Health and Care Plan (EHCP)- pupil has EHCP when a formal assessment has been made. A document is in place that sets out the child's needs and the extra help they should receive.
- K - SEN support - Extra or different help is given from that provided, as part of the school's usual curriculum. The class teacher and special educational needs co-ordinator (SENCO) may receive advice or support from outside specialists. The pupil does not have an EHCP.
- N – No SEN/EHCP in place

- **Enter Child's Address** - enter the child's home postcode and click on the search button, then from the drop-down box select the correct address and click on the confirm button.

**Search for an Address**

| | |
|---|---|
| Primary | |
| Postcode* | PR1 8XJ |

Search

Christ Church Precinct, Bow Lane, Preston, PR1 8XJ

**Address**

| | |
|---|---|
| Address Line 1* | Christ Church Precinct |
| Address Line 2 | Bow Lane |
| Address Line 3 | |
| Locality | |
| Town | Preston |
| County | |
| Postcode* | PR1 8XJ |

Cancel    Enter Manually    Confirm

If the address cannot be found the following error message will appear at the bottom of the page.

No matches were found. Please check your search criteria and try again or enter address manually.

You will need to check the address and once the correct address has been confirmed try again or enter the address manually. When entering the address manually you will need to enter address line 1 (name/number of house) and the postcode and click on the confirm button.

**On the Parent/Carer Details Tab**

Please note: to claim for the Early Years Pupil Premium and extended 15 hours you must complete this tab otherwise you could miss funding. Ensure that the correct consent boxes are selected as per the usage of the details, e.g. tick to give consent to eligibility checking for EYPP and/or Working Family Code.

| Home | Forms | **Funding** | |
|---|---|---|---|
| Summary | Estimates | Actuals | **Adjustments** Eligibility Checker |

**Name: Mickey Mouse DOB: 11-Aug-2020**

| Summary | Child Details | Parent / Carer Details | Funding Details | Pending Adjustment | Notes |

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended hours.

Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.

**Parent / Carer Details**

| | |
|---|---|
| Forename | Mouse |
| Surname | Mighty |
| DOB | 26-Dec-1988 |
| Email | mighty@gmail.com |
| Contact Number | |
| ☑ NI or  ☐ NASS Number | AA123456A |
| Tick to give consent to Eligibility Checking for | ☑ EYPP  ☑ Working Family Eligibility |

**Partner Details**

| | |
|---|---|
| Forename | |
| Surname | |
| DOB | |
| Email | |
| Contact Number | |
| ☐ NI or  ☐ NASS Number | |
| Tick to give consent to Eligibility Checking for | ☐ EYPP  ☐ Working Family Eligibility |

Save    Cancel    *denotes mandatory fields

**You need to:**

- Enter the forename, surname, date of birth, email address and contact number of the parent who is the main benefit holder.
- Tick either the NI/NASS* number box and enter the relevant number. You can include their partners details if you wish. Parent details for the main benefit holder should be entered in the boxes on the left-hand side.

\* NI means National Insurance Number which is in the format of: 2 letters, 6 numbers, 1 letter. NASS Number means National Asylum Support Service number which is in the format of: 9 numbers.

**On the Funding Details Tab**

Please note: Some of the fields on this tab are greyed out and you cannot complete them. Any hours you wish to claim via the supplementary process need to be entered on the pending adjustments tab.



**You need to:**

- **Input the attendance start and end dates**. The start and end dates should reflect the number of weeks you are claiming for on your supplementary claim.

- **Tick 'Attends Two Days or More' box if the child attends two days or more**. If they do not attend 2 days, then leave this blank. Please note that if this box **is not ticked** when the child attends two days or more, **you will not be allowed to input more than 10 funded hours per week.**

- **Tick Nominated for DAF** Yes or No radial buttons to reflect the parent's authority for you to claim DAF as per the Parental Agreement. Please note you can only tick 'Yes' if you have received a letter from the Local Authority confirming eligibility.

- **Input the Working Parent's Eligibility code (only if you are claiming for extended Hours).** Then click the blue Check Eligibility Code button which will check the eligibility

code.  Please note if the eligibility code is already displayed and there is a tick in the eligible for Extended Hours box, you do not need to click the blue Check Eligibility Code button.  If you are not claiming any extended hours you do not need to complete this field.

Once you have done this you will receive a message at the top of the screen.  The example below states 'The Eligibility Code has been found and eligibility for extended hours has been obtained'

Please note: You will need to have completed the Parent/Carer Details tab **first** for this to validate the code.



If you get the below message you will need to check that the child's date of birth, parent's national insurance number and the 11-digit eligibility code has been entered correctly.



For a code to be valid you must ensure that:

- It is the term after the child has reached the relevant age of eligibility.
- The Voucher Start Date is before the first day of the term you wish to claim funding for.
- The Voucher End Date is on or after the first day of the term you wish to claim funding for.

Please note: If the code has been found but is not valid in the term you are applying for you will see the following message:



- **Complete the Attendance Days** by clicking the Yes or No radial button as appropriate against each day of the week.

- The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are.  This box will change depending on your claim.  If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

Maximum Values Allowed:
Number of Weeks: **13.000**

Funded Weekly Hours: **10.00**
Funded Termly Hours: **130.00**
Funded Yearly Hours: **520.00**

Extended Weekly Hours: **10.00**
Extended Termly Hours: **130.00**
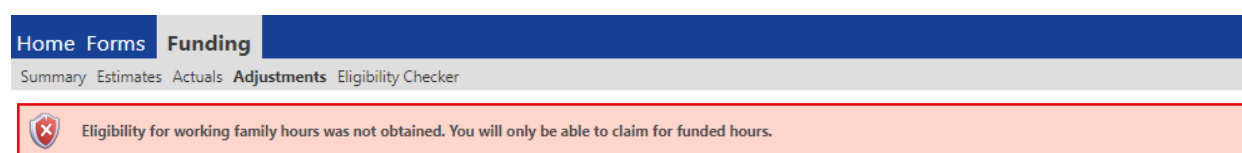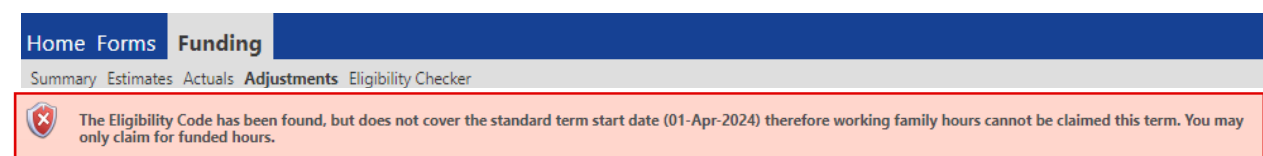Extended Yearly Hours: **520.00**

Maximum Values Allowed:
Number of Weeks: **13.000**

Funded Weekly Hours: **15.00**
Funded Termly Hours: **195.00**
Funded Yearly Hours: **570.00**

Extended Weekly Hours: **15.00**
Extended Termly Hours: **195.00**
Extended Yearly Hours: **570.00**

**On the Pending Adjustments tab**



- **Number of Funded hours -** From the drop-down box select more hours. You must not enter less hours as this would indicate you wish to reduce the number of hours.
- **Total number of Funded hours –** Enter the **TOTAL** number of funded hours you are making a claim for not the number of hours per week.
- **Reason –** In this box you **MUST** confirm the following information for **ALL** claims. If this information is missing we will be unable to process your claim.

    - **EEF start date –** enter the date child started
    - **Hours per week –** enter the number of hours per week you are claiming
    - **Weeks per term –** enter the number of weeks per term you are claiming.

The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.



*For example - You have a new starter whose EEF placement date is 03/07/2023 and the child is attending for 15 Universal hours and 10 extended hours for 9 weeks in the term, total of 135 universal hours and 90 extended hours. The adjustment claim will need to be completed as follows:*

**On the Notes Tab**
This is where you can type any notes relating to the child's claim any previous notes will be shown on the right-hand side.

Once you have completed all tabs, click on the **'Save' button** on the bottom left. If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen. Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the adjustments list. The child status will now show as Unsubmitted Claim. Please double check the funded hours listed are correct as this is what will be submitted to us. If the funded hours are not correct, please go back into the child's record to edit and save the child's record.



Repeat this process for every child you wish to claim a supplementary for

**Once you have finished adding or editing all records, for all children click the 'Send Claim' button.**

Once you submit the claim you will receive a Submission Successful message at the top of the screen and the Send Claim button will no longer be available until you click Add Child button again.



Once you have submitted your claim, you can view the current adjustments to ensure that all children have hours showing where a claim is being made and their status has updated to one of the following.

- New, awaiting LA download (for new children)
- Awaiting LA download (children who have been edited)

If the Status does not show any of the above and the child hours are zero, this means that you have not submitted the record and you will need to go back into the record and edit the hours/weeks and then click the 'Send Claim' button again.

Once we have processed your headcount claim the child status will be blank.

# 8f. Add a supplementary claim for an existing child



Go to Funding > Adjustments, then click on the year/team on the left-hand side and select the funding type you wish to make a supplementary claim for.



From the list of children, click on the child's name you wish to make a supplementary for. You will then be taken to the pending adjustments tab.

**On the Pending Adjustments tab**

- Select the Year/Term
- Click on the relevant funding type: 9 month – 2yo Funding, 2-Year-Old or 3&4 Year-Old
- Click on the relevant child to open their record
- Click on Pending Adjustment Tab

## 9 month – 2-year-old existing child



**For 9 month – 2 year-old funding type you need to:**

- **Number of hours -** From the drop-down box select more hours. You must not enter less hours as this would indicate you wish to reduce the number of hours.

- **Total number of hours –** Enter the **TOTAL** number of hours you are making a claim for not the number of hours per week.

- **Reason –** In this box you **MUST** confirm the following information for **ALL** claims. If this information is missing we will be unable to process your claim.

  - **EEF start date –** enter the date child started
  - **Hours per week –** enter the number of hours per week you are claiming.
  - **Weeks per term –** enter the number of weeks per term you are claiming



The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**On the 'Child Details' tab**



Check all details are correct and amend if necessary.

**Name: B Test DOB: 31-Mar-2020**

Summary | Child Details | Parent / Carer Details | Funding Details | Notes

**Child Details**

| | | **Address** | |
|---|---|---|---|
| Forename* | B | Address Line 1* | ABC 123 Street |
| Middle Name | | Address Line 2 | |
| Surname* | Test | Address Line 3 | |
| DOB* | 31-Mar-2020 | Locality | |
| Proof of DOB | ☐ | Town | |
| Gender* | ☐ Male ☑ Female | County | |
| Preferred Surname | | Postcode* | AB1 2CD |
| Ethnicity* | <unknown> | | |
| SEN COP Stage* | <Unknown> | | |

Save    Cancel    *denotes mandatory fields

Please note: if you are amending the child's date of birth you will be required to submit a copy of the child's birth certificate or passport to fee234@lancashire.gov.uk as evidence of the change before the amendment will be accepted by LCC.

**On the Parent/Carer Details tab**

Please note: Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for expanded hours. If you have consent you must complete this tab otherwise you could miss out on funding.



Check all details are correct and amend if necessary.

**On the Notes Tab**

This is where you can type any notes relating to the child's claim.  Any previous notes will be shown on the right-hand side.

Once you have completed all tabs, click on the **'Save' button** on the bottom left.  If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen.  Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the adjustments list. The child status will now show as Unsubmitted Claim and the number of hours you are claiming will be shown in the Pending Adj Hours column.  Please double check the funded hours listed are correct as this is what will be submitted to us.  If the funded hours are not correct, please go back into the child's record to edit and save the child's record.



Repeat this process for every child you wish to claim a supplementary for.

**<span style="color:red">Once you have finished adding or editing all records, for all children, click the 'Send Claim' button.</span>**



Once you submit the claim you will receive a Submission Successful message at the top of the screen and the Send Claim button will no longer be available until you click Add Child button again.

Once you have submitted your claim, you can view the current adjustments to ensure that all children have hours showing where a claim is being made and their status has updated to one of the following.

- New, awaiting LA download (for new children)
- Awaiting LA download (children who have been edited)

If the Status does not show any of the above and the child hours are zero, this means that you have not submitted the record and you will need to go back into the record and edit the hours/weeks and then click the 'Send Claim' button again.

Once we have processed your headcount claim the child status will be blank.

## 2-Year-Old existing child (disadvantaged funding)



## 2-Year-Old existing child (working family code)

**For both Disadvantaged and Working Family 2-year-old funding types you need to:**

- **Number of hours -** From the drop-down box select more hours. You must not enter less hours as this would indicate you wish to reduce the number of hours.
- **Total number of hours –** Enter the **TOTAL** number of hours you are making a claim for not the number of hours per week.
- **Reason –** In this box you **MUST** confirm the following information for **ALL** claims. If this information is missing we will be unable to process your claim.

  - **EEF start date –** enter the date child started
  - **Hours per week –** enter the number of hours per week you are claiming.
  - **Weeks per term –** enter the number of weeks per term you are claiming

| Maximum Values Allowed: | Maximum Values Allowed: |
|---|---|
| Number of Weeks: **13.000** | Number of Weeks: **13.000** |
| Funded Weekly Hours: **15.00** | Expanded Weekly Hours: **15.00** |
| Funded Termly Hours: **195.00** | Expanded Termly Hours: **195.00** |
| Funded Yearly Hours: **570.00** | Expanded Yearly Hours: **570.00** |

The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are.  This box will change depending on your claim.  If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

## 3 & 4-Year-Old existing child



**For 3 & 4-year-old funding type you need to:**

- **Number of hours -** From the drop-down box select more hours. You must not enter less hours as this would indicate you wish to reduce the number of hours.
- **Total number of hours –** Enter the **TOTAL** number of hours you are making a claim for not the number of hours per week.
- **Reason –** In this box you **MUST** confirm the following information for **ALL** claims. If this information is missing we will be unable to process your claim.

  - **EEF start date –** enter the date child started
  - **Hours per week –** enter the number of hours per week you are claiming.
  - **Weeks per term –** enter the number of weeks per term you are claiming

**Maximum Values Allowed:**
Funded Termly Hours: **130.00**
Funded Yearly Hours: **520.00**

**Maximum Values Allowed:**
Extended Termly Hours: **130.00**
Extended Yearly Hours: **520.00**

The red box shows how many funded weeks are available in a term and what the maximum weekly, termly and yearly hours are. This box will change depending on your claim. If children attend 2 days or more you can claim up to the maximum of 15 hours per week, however if children don't attend 2 days or more you can only claim 10 hours per week.

**On the 'Child Details' tab**



Check all details are correct and amend if necessary

Please note: if you are amending the child's date of birth you will be required to submit a copy of the child's birth certificate or passport to fee234@lancashire.gov.uk as evidence of the change before the amendment will be accepted by LCC.

**On the Parent/Carer Details tab**
Please note: Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended/expanded hours. If you have consent you must complete this tab otherwise you could miss out on funding.

**On the Notes Tab**

This is where you can type any notes relating to the child's claim. Any previous notes will be shown on the right-hand side.



Once you have completed all tabs, click on the **'Save' button** on the bottom left. If you have any errors when trying the save your record you will get a notification that the record cannot be saved, and the errors will be listed in red at the bottom of the screen. Once you have fixed the errors listed you will be able to save the record.



Once you have successfully saved the record, you will be taken back to the adjustments list. The child status will now show as Unsubmitted Claim and the number of hours you are claiming will be shown in the Pending Adj Hours column. Please double check the funded hours listed are correct as this is what will be submitted to us. If the funded hours are not correct, please go back into the child's record to edit and save the child's record.

Repeat this process for every child you wish to claim a supplementary for.

**Once you have finished adding or editing all records, for all children click the 'Send Claim' button.**



Once you submit the claim you will receive a Submission Successful message at the top of the screen and the Send Claim button will no longer be available until you click Add Child button again.



Once you have submitted your claim, you can view the current adjustments to ensure that all children have hours showing where a claim is being made and their status has updated to one of the following.

- New, awaiting LA download (for new children)
- Awaiting LA download (children who have been edited)

If the Status does not show any of the above and the child hours are zero, this means that you have not submitted the record and you will need to go back into the record and edit the hours/weeks and then click the 'Send Claim' button again.

Once we have processed your headcount claim the child status will be blank.

# 9. Payment information

All EEF payments are made in line with the following deadlines which are set out in the Funding Agreement.

| Term | Interim Payment Dates | Balancing Payment Dates |
|---|---|---|
| Autumn | 15 September | 10 December |
| Spring | 15 January | 10 March |
| Summer | 15 April | 10 July |

Within the Provider Portal there is a Summary screen which allows you to see information relating to payments made to you, for each term and for each funding type.

## 9a. Funding Summary

A summary of your claims will be available to view each term.



Go to Funding, Summary, then select the year, term and funding type for which you require the information.

This will open the Summary screen for that term and funding type.

**Summary: 2023/24 Summer - Fee 3 & 4 Year Old Funding** CHANGE

Rate x Hours may not equal Totals as rounding is applied per child.
The totals shown are the sum of the funding amounts per child.

| Estimates | | Actuals | |
|---|---|---|---|
| Term Length (Weeks) | 13.000 | Term Length (Weeks) Term Time | 13.000 |
| ▶ Provider Rate applied | £5.410 | ▶ Provider Rate applied to child funding | £5.410 |
| **Estimate Funding** | | **Funding** | |
| Hours Per Term | 0.00 | Funded Hours for Term | 195.00 |
| **Term Funding Amount** | **£0.00** | **Funding Amount @ Provider Rate** | **£1054.95** |
| Interim % | 60.00% | | |
| **Interim Amount Payable** | **£0.00** | **Funding Amount** | **£1054.95** |
| | | **Extended Funding** | |
| **Total Interim Amount Paid to Date** | **£0.00** | Funded Hours for Term | 0.00 |
| (before Adj) | | **Funding Amount @ Provider Rate** | **£0.00** |
| **Interim Amount Payable Balance** | **£0.00** | **Extended Funding Amount** | **£0.00** |
| | | **Totals** | |
| | | Funded Hours for Term | 195.00 |
| | | **Funding Amount @ Provider Rate** | **£1054.95** |
| | | **Child Weightings** | **£0.00** |
| Processed | No | **Term Funding Amount** | **£1054.95** |
| Processed Date | | Interim Amount Paid (before Adj) | £0.00 |
| | | **Term Funding Amount Balance** | **£1054.95** |
| | | Adjustments Paid with Final Payment | £0.00 |
| | | **Actual Amount Paid (Inc. Adj)** | **£0.00** |

The information is displayed as follows:

## Estimates

- **Term Length (Weeks)** - This refers to the number of funded weeks in the term i.e. 11 weeks in spring, 13 weeks in summer and 14 weeks in autumn.
- **Provider Rate applied** – This is your hourly Provider rate for the EEF.

## Estimates Funding

- **Hours per term –** This will show the estimated total hours for the term.  Estimated hours are automatically calculated based on the actual hours claimed in the previous term unless you have been invited to submit as revised estimate.
- **Term funding amount** – This will show the estimated total funding amount due for the term.
- **Interim %** - This will show the % of the interim payment received based on the estimate submitted.  Please refer to the Funding Agreement for details of the % rates paid each term.
- **Interim amount payable / Total interim amount paid to date (before Adj)** - This will show the interim amount payable based on the estimated hours.
- **Interim amount payable balance –** If there is any interim payable the amount will be shown.
- **Processed (Yes/No) and Processed date –** This will show if we have processed interim payments and the date payment was processed.  Please note the date shown is the date we have processed payments NOT the date funds will be in bank account.
  Please allow 5-7 working days for the funds to be in your account once we have processed payment.

## Actuals
- **Term length -** This refers to the number of funded weeks in the term i.e. 11 weeks in spring, 13 weeks in summer and 14 weeks in autumn.
- **Provider rate** – This is your hourly Provider rate for the EEF.

## Funded/Universal Hours
- **Funded hours for term** – This will show the total number of funded/universal claimed in the term.
- **Funding amount @ provider rate - Funded/Universal funding amount** - This will show the funding amount due based on the funded/universal hours claimed.

## Extended/Expanded Funding (this will only be shown if applicable)
- **Funded hours for Term** – This will show the total number of extended/expanded claimed in the term.
- **Funding amount @ provider rate – Extended/Expanded funding amount** – This will show the funding amount due based on the extended hours claimed.

## Totals
- **Funded hours for term –** This will show the total funded hours claimed for the term (Universal/Funded and extended/expanded, if applicable)
- **Funding amount @ provider rate** – This will show the total funding amount due for the term based on the total hours claimed.
- **Child weightings –** This will show any payments relating to Early Years Pupil Premium (EYPP) funding.
- **Term funding amount –** This will show the total funding amount due for the term (including any EYPPP payments)
- **Interim amount paid (before Adj) –** This will show any interim payments which have been made.
- **Term funding amount balance –** This will show the balance due for the term (term funding amount less the interim payment)
- **Adjustments paid with final payment –** This will show if any adjustments have been paid with the final payment i.e. Disability Access Funding / money owed to the council.
- **Actual amount paid (inc Adj) –** This will show the actual amount of funding paid for the term.
- **Processed (Yes/No) and Processed date –** This will show if we have processed interim payments and the date payment was processed.  Please note the date shown is the date

we have processed payments NOT the date funds will be in bank account. Please allow 5-7 working days for the funds to be in your account once we have processed payment.

Please note: if any adjustments (i.e. money owed to the Council) have been processed with your actuals payments, you will need to go to the adjustments tab to find out more information.



Go to Adjustments and if there are any adjustments paid with actuals, click on 'paid with actuals' to view the details.

# 9b. Paid adjustments

To view adjustments that have been paid, you need to go to Funding > Adjustments and the select the year, term and funding type you want to view the paid adjustments for.



At the top of the screen it will show a 'paid as adjustment' total and the date it was paid. Click on the down arrow next to 'paid' and it will list details of the adjustment.



# 10. Forms library

The following Forms are available for completion by accessing the 'Forms' tab at the top of the page within the portal. After you have submitted the completed form, a member the team will check your form and either approve it or give you a call if there is a problem.

Please note: The Early Years Census form and the Funding Agreement Acceptance form are currently only available when we require providers to complete them.

# 10a. Change of bank details form

This form **ONLY** needs completing if you wish to change the bank account the EEF is paid into. When requesting a change of bank details, you must allow 4 weeks for these changes to be actioned. During this period please do not close your existing bank account.

This form will be populated with your provider details and bank/payment details, you will need to update the bank details and when entering your sort code, please input **without** any spaces or hyphens. Ensure that you complete all the fields and double check the details you have input as this will be where your LCC payments will be made. Complete the contact / verification details and Authorised Signatory sections as required. The person completing the change request must be the same person who has signed the Funding Agreement. Choose the date of completion from the calendar in the date box and once you are happy with the details contained in the form click on Submit Form.

Once we have updated your details on our system, a colleague from our Procurement Information Management Team will contact you to verify the changes. Please note your bank details will not be updated until you have verified the details with our Procurement Information Management Team.

Example below:

# Change of Bank Details Form for Existing EEF Providers

Only complete this form if you want to change your bank account details with us. Please note: You must allow 4 weeks for these changes to be actioned. During this period please do not close your existing bank account.

## Provider Details

| | |
|---|---|
| Provider Name: | Test After School Club |
| Ofsted URN: | EY523456 |

## Payee Details

| | |
|---|---|
| Payee Name: | Wozza's Childcare |
| Payee Address: | Area Education Office |
| | Joint Divisional Offices |
| | Barnoldswick |
| Town/City: | Preston |
| County: | Lancashire |
| Postcode: | PR1 3NU |

## Bank and Payment Details

| | |
|---|---|
| Email address for Remittance Advice to be sent: | * |
| Sort code: | * |
| Account number: | * |

## Contact / Verification details

For audit and verification purposes our Procurement and Information Management (PIM) team will need to contact you to verify the changes. Please provide details of the appropriate contact below. Please note: Your details will not be updated until the changes have been verified.

| | |
|---|---|
| Contact Title: | |
| Contact First Name: | * |
| Contact Surname: | * |
| Contact Telephone Number: | * |
| Contact Email Address: | * |

## Authorised Signatory

An Authorised Signatory means such a person with the appropriate authority or permission from the Service Provider. The Council reserves the right to request evidence of this permission from time to time, and the Service Provider must provide this immediately upon request.

| | |
|---|---|
| Name of authorised person completing this form: | * |
| Please enter today's date: | * |

[Submit Form]

FIS Provider Portal - Part of the Synergy FIS Suite

# 10b. Changes to types of funded places offered

This form **ONLY** needs completing if you wish to change the types of funded places that you offer.

The tick boxes will show what funded places are currently being offered at your setting. You will need to update this to reflect the funding types you wish to offer.  Once you have done this you will need to confirm you agree to the terms of the Local Authority Agreement (a link to this is provided on the form) and provide your full name in the Authorised Signatory box and choose the date of completion from the calendar in the date box.  Once you are happy with the details contained in the form click on Submit Form

## Change to types of funded places offered

| Next Page | Select page: Change to types of funded places ˅ | >> |

**Childcare Provider Name:**     Test After School Club

**OFSTED Reference:**     EY523456

[Click here to view the Local Authority Agreement for the Provision of Early Education Funding September 2021](#)

*An Authorised Signatory means such a person with the appropriate authority or permission from the Service Provider to bind the Service Provider to the terms of this Agreement. The Council reserves the right to request evidence of this permission from time to time, and the Service Provider must provide this immediately upon request.*

**The tick boxes below show the types of funded places currently being offered at your setting. Please ensure that you have ticked/unticked the correct options to reflect the funded places that you will now offer.**

**As an authorised signatory of the above Childcare Provider I confirm that:**

☐ I will provide Early Education Funded place(s) for 2 year old children.

☐ I will provide the Universal 15 hours Early Education Funded place(s) for 3 & 4 year old children.

☐ I will provide the Extended 15 Hours Early Education place(s) for eligible 3 & 4 year old children.

I am the Authorised Signatory (i.e. The person with authority to bind the Provider to the terms of this Agreement). I have read and agree to abide by all aspects of the:-

1. The Local Authority Agreement for the Provision of Early Education Funding September 2021

2. Early Education and Childcare Act, Statutory Guidance for Local Authorities June 2018

3. Early Years Entitlements: Operational Guidance for Local Authorities and Providers June 2018

I understand that I will receive funding, if eligible, under the Lancashire Funding Agreement and that any failure on my behalf to uphold any obligation placed upon me by the Funding Agreement may result in a withdrawal of funding to deliver the Early Education Funded places in my setting and/or recall of any monies already paid. I understand that the above named setting may be subject to visits and/or audit monitoring by Lancashire County Council Officers to examine any aspect of the delivery of the Early Education Funding to ensure full compliance.

As outlined in the Funding Agreement I understand that the Local Authority will maintain and keep an up-to-date directory of childcare providers and make available relevant details through the Family Information Service to parents. By submitting this acceptance form I am giving consent for my setting to be included in the directory of childcare providers.

**I agree to all the terms of the above agreement**     ☐Yes ☐No

**Full name of Authorised Signatory completing this form:**     [_____] *

**Please enter today's date: dd/mm/yyyy**     [_____] * 🔲

We will check the details you have entered and email you to let you know if we accept your form, or if you have completed it incorrectly.

You cannot make a headcount or supplementary claim until your form has been accepted as being correctly completed.

# 10c. Early Years Census

In the Spring Term we submit an Early Years Census to the Department for Education (DfE). All providers who make a claim in the Spring Term **MUST** complete this form. It will only be available for a short period of time during the Spring Term and if it is not completed we will be unable to pay your final spring headcount balancing payment. We will email all providers in the Spring Term and guidance notes for completing this form will be included.

## Early Years Census

| Next Page | Select page: Early Years Census ⌄ | >> |

Early Years Census Guidance Notes

### Early Years Census Return

The collection of data for the Early Years Census is a statutory requirement on Early Years Providers and local authorities through regulations under Section 99 of the Childcare Act 2006 and The Education (Provision of Information About Young Children) (England) Regulations 2009.

Please complete and submit the following census return for your childcare setting, ensuring that the information is accurate and up to date. All census returns together with a valid headcount claim must be submitted no later than Sunday 22nd January 2023. The census form has been pre-populated with data from the 2022 Early Years Census. Please check each question and update the data accordingly before submitting the census form.

**PLEASE NOTE: FAILURE TO SUBMIT THIS FORM WILL LEAD TO YOUR SPRING FUNDING BEING DELAYED.**

| | |
|---|---|
| Day Care Type? | Full D ⌄ |
| Total Number of 2 Year Olds (Funded and Non-Funded)? | 1 |
| Total Number of 3 Year Olds (Funded and Non-Funded)? | 2 |
| Total Number of 4 Year Olds (Funded and Non-Funded)? | 3 |

**Staff Details Please Note - Only the highest level qualification for each member of staff is to be recorded, double counting must not occur**

| | |
|---|---|
| Total number of paid staff, working with children under 5 years? | 10 |
| Total number of paid staff working with children under 5 years with a full and relevant level 2 qualification? | 3 |
| Total number of paid staff with a full and relevant early years, level 3 qualification and not in a managerial role, who work with children aged under 5 years? | 3 |

Total number of paid staff working with a full and relevant early years level 3 qualification and in a managerial role, who work with children aged under 5 years?

`1`

Total number of paid staff with qualified teacher status who work with children aged under 5 years?

`2`

Total number of paid staff with early years professional status who work with children aged under 5 years?

`0`

Total number of paid staff with early years teacher status who work with children aged under 5 years?

`0`

**Other Information**

Are you open, 24/7?

◉ Yes
○ No

Do you operate on the premises of a maintained school or have a partnership arrangement with a maintained school?

◉ Yes
○ No

Do you work in partnership with another PVI establishment to provide funded early education?

◉ Yes
○ No

How many weeks are you open each year?

`38`

How many weeks in the current calendar year are you open and funded by the Local Authority?

`38`

**Thank you for completing this form, please click the Submit button to complete**

[ Submit Form ]

FIS Provider Portal - Part of the Synergy FIS Suite

# 10d. Funding Agreement acceptance form

The Funding Agreement for the Provision of Early Education Funding outlines the terms and conditions of funding for all Private, Voluntary, and Independent (PVI) providers that wish to offer the funded entitlements. All Ofsted registered providers are required to accept the terms and conditions of the Funding Agreement if they wish to offer Early Education Funding.

The Agreement will automatically renew on the same terms and conditions on the 1 September each year unless notified otherwise. In the event of there being any changes to the terms and conditions the Provider will be notified.

This form will only need completing when there has been an update to the terms and conditions and it will only be available on the portal for a short period of time. When completing the new agreement the Childcare Provider Name, Ofsted Reference and the funding types the provider is registered for will be pre-populated. Once you have read and are happy with the agreement you will need to confirm you agree to the terms and provide your full name in the Authorised Signatory box and choose the date of completion from the calendar in the date box.

<span style="color:red">Please note Authorised Signatory means such person with the appropriate authority or permission from the Service Provider to bind the Service Provider to the terms of the Agreement.</span>

## Funding Agreement Acceptance: for the Provision of Early Education Funding Effective from 1st September 2022

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|---|---|---|

**Childcare Provider Name:**      Test After School Club

**OFSTED Reference:**      EY523456

[Click here to view the Local Authority Agreement for the Provision of Early Education Funding](#)

*An Authorised Signatory means such a person with the appropriate authority or permission from the Service Provider to bind the Service Provider to the terms of this Agreement. The Council reserves the right to request evidence of this permission from time to time, and the Service Provider must provide this immediately upon request.*

**As an authorised signatory of the above Childcare Provider I confirm that:**

☐ **I will provide Early Education Funded place(s) for 2 year old children.**

☐ **I will provide the Universal 15 hours Early Education Funded place(s) for 3 & 4 year old children.**

☐ **I will provide the Extended 15 Hours Early Education place(s) for eligible 3 & 4 year old children.**

I am the Authorised Signatory (i.e. The person with authority to bind the Provider to the terms of this Agreement). I have read and agree to abide by all aspects of the:-

1. The Local Authority Agreement for the Provision of Early Education Funding September 2022

2. Early Education and Childcare Act, Statutory Guidance for Local Authorities June 2018

3. Early Years Entitlements: Operational Guidance for Local Authorities and Providers June 2018

I understand that I will receive funding, if eligible, under the Lancashire Funding Agreement and that any failure on my behalf to uphold any obligation placed upon me by the Funding Agreement may result in a withdrawal of funding to deliver the Early Education Funded places in my setting and/or recall of any monies already paid. I understand that the above named setting may be subject to visits and/or audit monitoring by Lancashire County Council Officers to examine any aspect of the delivery of the Early Education Funding to ensure full compliance.

As outlined in the Funding Agreement I understand that the Local Authority will maintain and keep an up-to-date directory of childcare providers and make available relevant details through the Family Information Service to parents. By submitting this acceptance form I am giving consent for my setting to be included in the directory of childcare providers.

**I agree to all the terms of the above agreement**        ⬜Yes ⬜No

**Full name of Authorised Signatory completing this form:**                                                              *

**Please enter today's date:**
**dd/mm/yyyy**                                                                    * 🗓

We will check the details you have entered and email you to let you know if we accept your form, or if you have completed it incorrectly.

**You cannot make a headcount or supplementary claim until your form has been accepted as being correctly completed.**

Submit Form

FIS Provider Portal - Part of the Synergy FIS Suite

Once you are happy with the details contained in the form click on Submit Form. You will then get a pop-up message to confirm if you are sure you want to submit this form. If you are happy with the details you have provided then click ok. You can cancel if you wish to review/edit the information before sending.

**fisonline.lancashire.gov.uk says**

Are you sure you want to submit this form? Clicking OK will close this message and submit the form to the LA. Clicking Cancel will close this message and leave the form open.

OK        Cancel

Once submitted you will get a message to confirm the form has successfully been submitted.

**Home** | **Forms** | **Funding**

**Fill In Forms**  View Forms

✔  **You have successfully submitted the form.**

**Fill In Forms**

The Funding Agreement Form will then be received and reviewed by the EEF Team who will either accept or decline your submission (if it is incomplete). We will notify you if your Funding Agreement Form is declined due to errors with your submission. Once you have signed the Funding Agreement you are bound by the terms and conditions of the Funding Agreement until you either give us the required written notice that you no longer wish to be a EEF provider or the Funding Agreement lapses.

# 10e. New EEF provider registration form

This form **ONLY** needs completing if you wish to register with us as an EEF provider.

The Childcare Provider Name, Provider Type and Ofsted Reference will be prepopulated. You will need to tick what funding types you would like to register for, complete the bank details and provide an email address that accounts payable will use to send a remittance advice to. You will also need to confirm you agree to the terms and provide your full name in the Authorised Signatory box, choose the date of completion from the calendar in the date box and confirm your email address. If you would like for us to create additional users for your online provider portal you can complete the 'Additional Persons' section. Once complete click on the submit button.

Once we have checked you are eligible to offer the funded places, we will complete your registration.

Please note you will not be able to claim for any children until you have received our confirmation email that you are now an EEF eligible provider.

# Bank Details

**Payee / Organisation Name:** Wozza's Childcare

**Sort Code:** ___ * **Account Number:** ___ *

**Payee Address:**
Area Education Office

Joint Divisional Offices

Barnoldswick

Preston

Lancashire

PR1 3NU

**Email Address for Remittance Advice to be sent:** ___ *

# Authorised Signatory Details

I am the Authorised Signatory (i.e. The person with authority to bind the Provider to the terms of this Agreement). I have read and agree to abide by all aspects of the:-

1. The Local Authority Agreement for the Provision of Early Education Funding September 2022

2. Early Education and Childcare Act, Statutory Guidance for Local Authorities June 2018

3. Early Years Entitlements: Operational Guidance for Local Authorities and Providers June 2018

I understand that I will receive funding, if eligible, under the Lancashire Funding Agreement and that any failure on my behalf to uphold any obligation placed upon me by the Funding Agreement may result in a withdrawal of funding to deliver the Early Education Funded places in my setting and/or recall of any monies already paid. I understand that the above named setting may be subject to visits and/or audit monitoring by Lancashire County Council Officers to examine any aspect of the delivery of the Early Education Funding to ensure full compliance.

As outlined in the Funding Agreement I understand that the Local Authority will maintain and keep an up-to-date directory of childcare providers and make available relevant details through the Family Information Service to parents. By submitting this acceptance form I am giving consent for my setting to be included in the directory of childcare providers.

**I agree to all the terms of the above agreement**          ☐ Yes
                                                              ☐ No

**Full name of Authorised Signatory completing this form:** ___ *

**Please enter today's date:**
dd/mm/yyyy ___ * 🗓

**Authorised Signatory Email Address** ___ *

# Additional persons to be created with access to Provider Portal

Note: Please provide details of all people who require access to the online Provider Portal. These people will be able to make headcount or supplemtary funding claims and update provider and bank details forms

| Full Name | Email Address | Post / Role |
|-----------|---------------|-------------|
|           |               |             |
|           |               |             |
|           |               |             |

We will check the details you have entered and email you to let you know if we accept your form, or if you have completed it incorrectly.

**You cannot make a headcount or supplementary claim until your form has been accepted as being correctly completed.**

[ Submit Form ]

FIS Provider Portal - Part of the Synergy FIS Suite

You will then get a pop-up message to confirm if you are sure you want to submit this form. If you are happy with the details you have provided then click ok. You can cancel if you wish to review/edit the information before sending.



Once submitted you will get a message to confirm the form has successfully been submitted.



# 10f. Update your details form
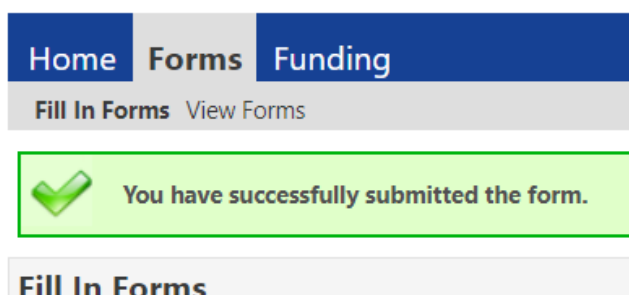
We advertise your details online, over the telephone and in writing for free, with the Family Information Service, therefore, it is imperative that we have the most up-to-date information about your setting. Please note: All providers who are registered to offer Early Education Funded places will be advertised on our website so that families can search for relevant childcare and Early Education Funded places. You may choose to use limited address details, and only share part of your address.

The update your details form is available for you to view what our database contains about your setting and to request amendments. Your information is available to the public via telephone, face-to-face and on the internet if you give appropriate consent by using this form.

To review or update your details you need to complete and submit the 'Update Your Details Form' via the Provider Portal. This will then open a separate window where you can add or edit the details of your setting.

The first page shows your settings address and contact details. Boxes in grey are details given to us by Ofsted and can't be changed via the Provider Portal (please contact Ofsted if they need updating).

## Update Your Details

**To ensure we have the most up to date information about your childcare provision, please check the following information carefully, ensuring that any pre-populated information is correct, make any amendments where necessary and complete any new information as requested.**

Where information below has a grey background, this means that you can only view the information and not change it as this information is supplied by Ofsted. If you want to change any of this information please contact Ofsted using the email address enquiries@ofsted.gov.uk

| | |
|---|---|
| Provider Name | Test Day Nursery |
| Provider Telephone Number (one number only) | 01772 533552 |
| Email Address (one email address only) | fee234@lancashire.gov.uk |
| Mobile Number (one number only) | 01772 533552 |
| Address Line 1 | Po Box 100 |
| Address Line 2 | Royal Mail |
| Address Line 3 | Christian Road |
| Locality | |
| Town | Preston |
| Postcode | PR1 0LD |
| Web Site | www.lancashire.gov.uk/education/childcare |

If you have other types of childcare available within your setting such as a before and after school club, holiday scheme or creche then please contact us directly on 0300 123 6712 or by email at lancsfis@lancashire.gov.uk

[ Submit Form ]

Click 'next page' to continue filling in your details.

Consultation and regular feedback from parents suggests they would like you to display as much information on your setting as possible to ensure they get a full picture of the service you offer to enable them to make an informed choice about their available childcare options.

- Displaying your opening times will help parents to see at first glance if you offer childcare to fit with the times they require care.
- We do understand that costs can vary for a variety of reasons, however parents and carers do like a guideline price to help them make an informed decision about the cost they might expect to pay when selecting the right childcare for their family. We strongly advise parents and carers to discuss and agree individual requirements and costs with each childcare provider before entering into a childcare agreement.
- The service description is the part with which you can sell the unique aspects of your settings, don't be shy!
- Families with school aged children can really benefit from knowing which schools you pick up or drop off from.

# Update Your Details

## Opening Times and Costs

Please amend or add your opening times below:

Daily Opening Times, please use 24 hour clock format for your opening (e.g. 07:30) and closing times (e.g. 18:00)

| Day | Start Time | End Time |
|---|---|---|
| Monday ▾ | 7:30 | 18:00 |
| Tuesday ▾ | 7:30 | 18:00 |
| Wednesday ▾ | 7:30 | 18:00 |
| Thursday ▾ | 7:30 | 18:00 |
| Friday ▾ | 7:30 | 18:00 |
| Saturday ▾ | 7:30 | 18:00 |

🔲 Insert item

Lancashire Family information Service understands that costs may vary for a variety of reasons for example by age, however parents and carers do like a guideline price to help them make an informed decision about the cost they might expect to pay when selecting the right childcare for their family. We strongly advise parents and carers to discuss and agree individual requirements and costs with each childcare provider before entering into a childcare agreement.

Please state an average price for the most appropriate cost options listed below:

Cost per Hour £          3.5

Cost per Session £          10

Cost per Day £          20

Cost per Week £          40

Cost per Term £          120

Specific cost details, e.g. by age range.          ▲▼

Do You Offer Any Cost Reductions, E.G. For Siblings?          ○ Yes  ◉ No

If yes please state reductions details:

Tell us how good your service is. This information is essential in helping to sell your services to parents. It can help make the difference between parents choosing your quality childcare setting as opposed to another quality Lancashire childcare setting.

**Please include as many unique selling points that you offer within your service and don't be shy, this is your chance to sell your childcare provision!!!**

The Nursery is situated in two spacious, detached properties, each of which is fully equipped to best meet the needs of the different age groups. We have been judged 'outstanding in all areas' by Ofsted and are Lead Practioners, which means other nursery practitioners visit our nursery to observe best practise.

The Staff are full-time and qualified in childcare, and the owner/manager is a specialist Early Years Teacher who ensures the children receive a high level of care and are well prepared for the best possible start in school.

The Pre-School Unit offers base rooms for each age group and a well-resourced room for small-group activities. The garden is extensive, and a large shelter ensures outdoor play is an option at all times. A

## Schools Collection and Drop Off

If you offer a drop off or collection service to local schools in your area please list below the schools to which you would be willing to travel to:

| School |
|---|
| Lever House Primary School ▾ |
| Leyland Methodist Infant School ▾ |

🔲 Insert item

Click 'next page' to continue filling in your details.

- Providing the ages of children (in months) you care for will help parents to see if your setting is a suitable option for them.
- We understand that your childcare vacancies will vary daily and that your Ofsted registration offers flexibility regarding child places to meet parental demand and operate with minimum staffing costs. However having this information will help parents to see at first glance if you have any vacancies.
- Facilities can paint a good picture of what you have to offer as a childcare provider.
- To enable your details to be advertised as widely as possible to parents looking for childcare please select all the options available to promote your service.
- Childminders can select to use a limited address (this will display only town and postcode as your address). Some Childminders prefer to select this as a safeguarding measure.

## Update Your Details

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What is the lowest age in months you will provide care for? `3`

What is the highest age in months you will provide care for? `144`

### Vacancy Information

Lancashire Family information Service understands that your childcare vacancies will vary on a daily basis and that your Ofsted registration offers flexibility regarding child places in order to meet parental demand and operate with minimum staffing costs.

How many vacancies do you have currently (please use numbers only, no words): `0`

Further information about vacancies, for example your vacancy may only be available in the afternoons or apply to specific age ranges such as 0 - 2 years etc.

### Facilities Offered

Please list the appropriate facilities that you offer as part of your service below:

Facilities Available

| Facility |
| --- |
| Car Parking ⌄ |
| Garden ⌄ |
| Pet Small Mammal(s) ⌄ |
| Private Changing Area ⌄ |

☑ Insert item

### Consent to Publish Information to Families in Lancashire

By checking the boxes below you consent that we can use your details to promote your service via:

☑ Not Available To Public

☐ the internet          ☐ Face to face or over the telephone          ☐ In Writing

**For childminders only**

○ Use full address details     ◉ Use limited address details

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Submit Form

# 10g. Status of your submitted Forms

To view the status of your forms click on Forms > View Forms.  A list of Forms that you have submitted will show and you will be able to see the status of each form.



# 11. Contact details

Details regarding Early Education Funding is located on our webpages, where you will find lots of useful information which may help with your enquiry.

For information, support and services for professionals, please visit Childcare and early years settings - Lancashire County Council

For information, support and services for parents/carers, please see Early years, childcare and family support - Lancashire County Council

For any queries relating to the Early Education Funding and claims please contact the EEF team on 01772 533552 or email fee234@lancashire.gov.uk