

Provider Portal – Adding a new child to a headcount

**STEP 1:**  
Select "Funding" tab and then select "Actuals"

**STEP 2:**  
Find the required term / funding type for the headcount you would like to complete and click on "Select" from the relevant row.

Home Forms **Funding** Images

Summary Estimates Actuals Adjustments Eligibility Checker

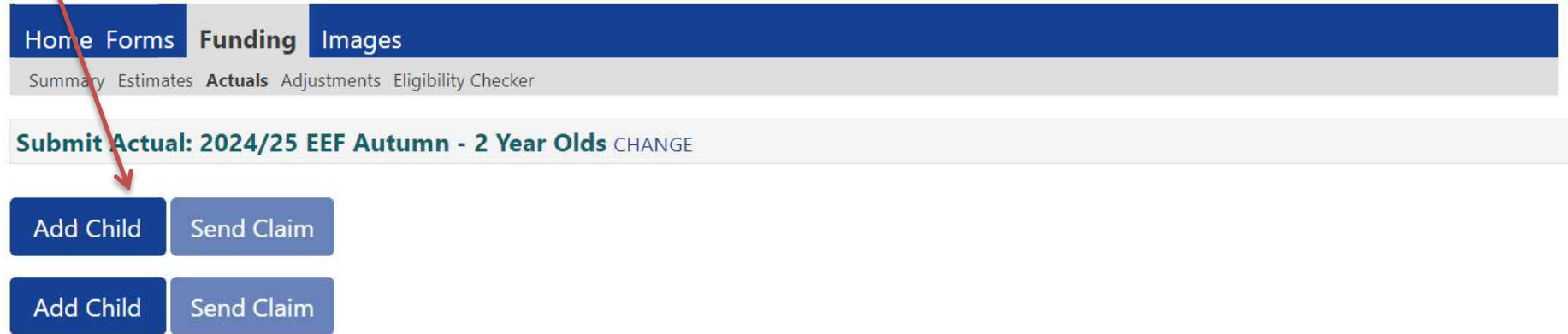
**Summary Head Count Records for 2024/25 - EEF Autumn**

2024/25
EEF Autumn
2023/24
2022/23
2021/22
2020/21
2019/20
2018/19

Funding Type
2 Year Olds
3&4 Year Olds
9 Month - 2 Year Old

**STEP 3:**

A child can be added to the headcount if their details are not currently showing. To start adding a new child click on the "Add Child" button.



The screenshot shows a software interface with a dark blue header bar containing the tabs "Home", "Forms", "Funding", and "Images". Below this is a light grey navigation bar with the links "Summary", "Estimates", "Actuals", "Adjustments", and "Eligibility Checker". A white banner below the navigation bar displays "Submit Actual: 2024/25 EEF Autumn - 2 Year Olds" with a "CHANGE" link. Below the banner are two rows of buttons. Each row contains a dark blue "Add Child" button and a lighter blue "Send Claim" button. A red arrow originates from the instruction box and points to the first "Add Child" button.

**STEP 4:**

The first set of information to enter relates to the details of the child. Mandatory fields are shown in bold text and have an \* at the end. It is a statutory requirement to check a child's date of birth before making a claim for funding. Please tick the "Proof of DOB" to confirm that you have seen the original birth certificate and a copy is held by the setting.

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Child Details Parent / Carer Details Funding Details Documents

### Child Details

**Forename\***

Middle Name

**Surname\***

**DOB\***

Proof of DOB

**Gender\***  Male  Female

Preferred Surname

Ethnicity

SEN COP Stage

### Search for an Address

Primary

**Postcode\***

### Address

**Address Line 1\***

Address Line 2

Address Line 3

Locality

Town

County

**Postcode\***

\*denotes mandatory fields

**STEP 5:**

Click on the "Parent/Carer Details" tab to add the information required to complete an Early Years Pupil Premium (EYPP) check or to add an eligibility code. The parent date of birth is mandatory for an EYPP check.

You must obtain consent from the parent/carers. Failure to tick the consent box will result in no eligibility code check or EYPP check being carried out.

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Child Details **Parent / Carer Details** Funding Details Documents

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.

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		Partner Details	
Forename	<input type="text"/>	Forename	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
DOB	<input type="text"/>	DOB	<input type="text"/>
Email	<input type="text"/>	Email	<input type="text"/>
Contact Number	<input type="text"/>	Contact Number	<input type="text"/>
<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>
Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility	Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility

\*denotes mandatory fields

**STEP 6:** Click on the "Funding Details" tab.

Click on the "Default Term Dates" button to populate the "Term Start Date" and "Term End Date" fields.

Enter the number of weeks that the child is attending during the term. Further information on the number of weeks in a term can be found on the EEF webpages.

**STEP 7:** Select the "Present During Census" checkbox if you know they are present at headcount. Select the "Attends Two Days or More" checkbox as appropriate. If you don't select this box and enter more than 10 hours you will get an error message to select this box.

Select Yes or No for the "Nominated for DAF" field (this is the Disability Access Fund). Please send relevant paperwork as per the DAF guidance on the EEF webpages.

If a child is going to stretch their funding please ensure the Stretching Entitlement box is checked.

**STEP 8:** Choose either Disadvantaged Funding or Working Family Funding.

For Disadvantaged Funding you should have seen an approval letter for the child from Solihull Council. Enter Disadvantaged Funding Hours in the "Funded Hours" box.

For Working Family Funding enter a valid eligibility code and click "Check Eligibility Code" which should result in a green tick at the top of the page.

If you don't get a green tick you will need to contact the Parent/Carer to check the eligibility code, parent NI number and child's DOB.

Enter the funded hours in the "Expanded Hours" box.

The screenshot shows the 'Funding Details' tab in a web application. The form includes the following sections and fields:

- Funding Details:** Start Date\*, End Date\*, Weeks Attended in Term\*, Present during Census (checkbox), Attends Two Days or More (checkbox), Nominated for DAF\* (radio buttons for Yes/No), Stretching Entitlement (checkbox), Funding Type\* (radio buttons for Disadvantaged Funding/Working Family Funding).
- Attendance Days:** A list of days from Monday to Sunday, each with Yes/No radio buttons.
- Non-Funded Hours per Week:** Non-Funded Hours\* (text input field).
- Default Term Dates:** A blue button that, when clicked, populates the Start and End Date fields.
- Footer:** Save and Cancel buttons, and a note: \*denotes mandatory fields.

Annotations and step instructions are overlaid on the form:

- STEP 6:** An arrow points to the 'Funding Details' tab.
- STEP 7:** An arrow points to the 'Default Term Dates' button.
- STEP 8:** An arrow points to the 'Funding Type' radio buttons.
- STEP 9:** An arrow points to the 'Non-Funded Hours\*' input field.

A red box at the bottom of the form contains the following text:

**Maximum Values Allowed:**  
Number of Weeks: 14.00

Save

Cancel

\*denotes mandatory fields

**!** Children can only be funded for one funding type, please select which funding type you wish to enter before proceeding.

**!** 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/carers

**STEP 9:** Enter "Non Funded Hours" in this box for any hours the family are paying for.

**STEP 10:** If you intend to claim DAF for a child please click in Documents section and upload the child's current Disability Living Allowance award letter and current Parental Declaration Form to show that the Parent/Carer has nominated you for DAF.

You can skip this step if you don't intend to claim DAF for the child.

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Child Details Parent / Carer Details Funding Details **Documents**

**Supporting Documents**  
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.  
Allowed file types are: .png,.bmp,.doc,.docx,.jpg,.pdf,.rtf,.odt,.msg  
Files may not be larger than 50 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

**STEP 10:** Click "Save". The child record will then show in the headcount list.

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

**NEXT STEPS:** When the child details have been added the "Send Claim" button will be available. Please do not submit the headcount claim to SMBC prior to headcount day (details of which can be found in the term funding pack issued by the FIS Team).

When the send claim button is clicked only the records that have been changed since the previous submission will be passed to SMBC.

When the details have been submitted the status of the records that have been submitted will change to "New, Awaiting LA Download". The status will disappear once the claim has been authorised by the FIS Team.