

## 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.

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### 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.

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**Submit Actual: 2024/25 EEF Autumn - 3&4 Year Olds** CHANGE

Add Child

Send Claim

Add Child

Send Claim

**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.

**Child Details**

<b>Forename*</b>	<input type="text"/>
Middle Name	<input type="text"/>
<b>Surname*</b>	<input type="text"/>
<b>DOB*</b>	<input type="text"/>
Proof of DOB	<input type="checkbox"/>
<b>Gender*</b>	<input type="checkbox"/> Male <input type="checkbox"/> Female
Preferred Surname	<input type="text"/>
Ethnicity	<unknown> ▼
SEN COP Stage	<Unknown> ▼

**Search for an Address**

Primary	<input type="text"/>
<b>Postcode*</b>	<input type="text"/>
	<input type="button" value="Search"/>

**Address**

<b>Address Line 1*</b>	<input type="text"/>
Address Line 2	<input type="text"/>
Address Line 3	<input type="text"/>
Locality	<input type="text"/>
Town	<input type="text"/>
County	<input type="text"/>
<b>Postcode*</b>	<input type="text"/>

Save

Cancel

\*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:** If claiming Universal Hours please enter these hours in the Funded Hours per Week Hours.

If claiming Extended Hours 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 extended hours in the “Extended Hours” box.

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

The screenshot shows the 'Funding Details' tab of a web form. The form is divided into several sections:

- Funding Details:** Includes fields for 'Start Date\*', 'End Date\*', and 'Weeks Attended in Term\*'. A blue button labeled 'Default Term Dates' is positioned below the date fields. Below this are checkboxes for 'Present during Census', 'Attends Two Days or More', 'Nominated for DAF\*' (with 'Yes' and 'No' radio buttons), and 'Stretching Entitlement'.
- Attendance Days:** A list of days from Monday to Sunday, each with 'Yes' and 'No' radio buttons.
- Funded Hours per Week:** Includes a field for 'Hours\*' and a section for 'Extended Funded Hours per Week' with an 'Extended Hours\*' field and an 'Eligibility Code' field. A blue button labeled 'Check Eligibility Code' is below the code field. There is also a checkbox for 'Eligible for Extended Hours'.
- Non-Funded Hours per Week:** Includes a field for 'Non-Funded Hours\*'. Below this is a warning icon and text: 'if this child attends another setting as well as yours, be sure to hours as per what has been agreed with the child's parent/carer'.
- Summary Table:** A red-bordered box at the bottom right contains the following data:

Maximum Values Allowed:	
Number of Weeks:	14.00
Funded Weekly Hours:	10.00
Funded Termly Hours:	140.00
Funded Yearly Hours:	380.00
Extended Weekly Hours:	10.00
Extended Termly Hours:	140.00
Extended Yearly Hours:	380.00

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a note: '\*denotes mandatory fields'.

**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		

Save Cancel \*denotes mandatory fields

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

**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.