

Provider Portal – Adding a new child to a headcount

STEP 1:

Select “Funding” tab and then select “Actuals”

STEP 2:

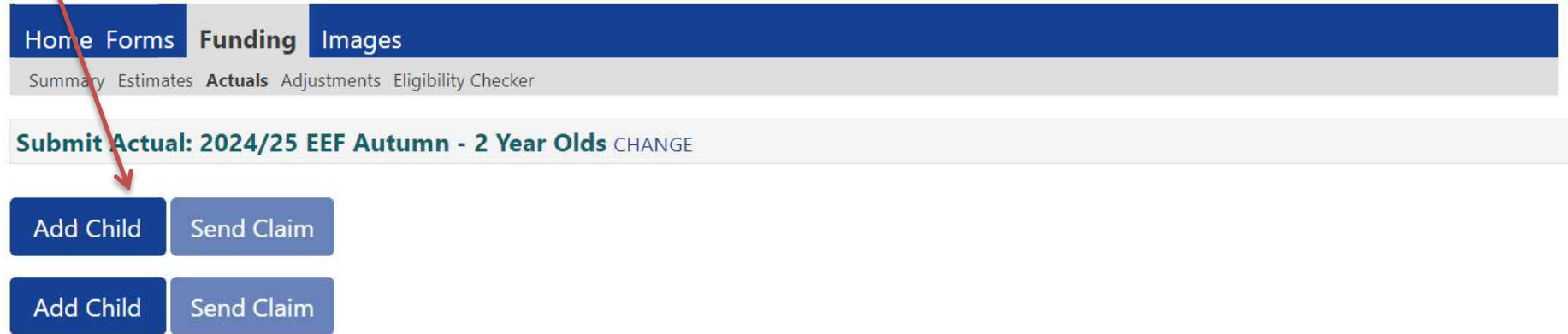
Find the required term / funding type for the headcount you would like to complete and click on “Select” from the relevant row.

The screenshot shows the Provider Portal interface. At the top, there are three main tabs: Home, Forms, and Funding. The Funding tab is selected. Below it, there are sub-tabs: Summary, Estimates, Actuals, Adjustments, and Eligibility Checker. The Actuals sub-tab is selected. The main content area is titled "Summary Head Count Records for 2024/25 - EEF Autumn". On the left, there is a vertical list of years from 2024/25 to 2018/19. The 2024/25 year is selected, and the "EEF Autumn" record is highlighted. On the right, there is a table with the following data:

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 navigation menu: Home, Forms, Funding, and Images. Below this is a light grey sub-menu with options: Summary, Estimates, Actuals, Adjustments, and Eligibility Checker. A light grey banner below the sub-menu displays the text: Submit Actual: 2024/25 EEF Autumn - 2 Year Olds CHANGE. 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 directly 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.

Home Forms **Funding** Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

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.

Home Forms **Funding** Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

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.

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

STEP 10: Enter “Funded Entitlement Weeks” which is the number of weeks you would claim over one year e.g. 38 weeks if term time only.

The screenshot shows the 'Funding Details' form with the following sections and fields:

- Navigation:** Home Forms, Funding, Images. Sub-navigation: Summary, Estimates, Actuals, Adjustments, Eligibility Checker.
- Tabs:** Child Details, Parent / Carer Details, Funding Details (selected), Documents.
- Funding Details Section:**
 - Start Date* (text input)
 - End Date* (text input)
 - Default Term Dates (button)
 - Weeks Attended in Term* (text input)
 - Present during Census (checkbox, highlighted with a yellow box)
 - Attends Two Days or More (checkbox)
 - Nominated for DAF* (radio buttons: Yes, No)
 - Stretching Entitlement (checkbox)
 - Funding Type* (radio buttons: Disadvantaged Funding, Working Family Funding)
- Attendance Days Section:**
 - Attends Monday (radio buttons: Yes, No)
 - Attends Tuesday (radio buttons: Yes, No)
 - Attends Wednesday (radio buttons: Yes, No)
 - Attends Thursday (radio buttons: Yes, No)
 - Attends Friday (radio buttons: Yes, No)
 - Attends Saturday (radio buttons: Yes, No)
 - Attends Sunday (radio buttons: Yes, No)
- Non-Funded Hours per Week Section:**
 - Non-Funded Hours* (text input)
- Census Information Section:**
 - Funded Entitlement Weeks (text input)
 - Records the Number of Weeks the Child is expected to stretch their Funded hours across the Child's eligibility year, in line with the parental declaration form.
 - Maximum Values Allowed: Number of Weeks: 12.00 (highlighted in a red box)
- Footer:** Save, Cancel buttons. *denotes mandatory fields.

STEP 11: 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.

Home Forms **Funding** Images

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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 12: 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.

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.