

Provider Portal – Updating an existing child

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 select the relevant row.

NOTE:
The first screen displayed is the child summary screen.

Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
Unchanged	31-Jan-2014	0.00	0.00	0.00		18-Sep-2017 - 09-Feb-2018 Grace Period: 31-Mar-2018
Unchanged	27-Nov-2013	0.00	0.00	0.00		21-Sep-2017 - 14-Dec-2017 Grace Period: 31-Mar-2018
Unchanged	27-Nov-2013	0.00	0.00	0.00		27-Apr-2017 - 19-Dec-2017 Grace Period: 31-Mar-2018

STEP 3:
Funded hours for all the children carried forward to the new term need to be added.

Where required a 30hr eligibility code can be updated or added to a child record and a code validity check completed.

To update a child’s record click on the child’s name, which is shown in orange text.

NOTE:
This may not be the current 30hr data. This information will be refreshed in step 9.

Close

*denotes mandatory fields

STEP 4:
Click on the "Child Details" tab.

Check the information displayed and update as required.

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*

Search

Address

Address Line 1*

Address Line 2

Address Line 3

Locality

Town

County

Postcode*

Save Cancel *denotes mandatory fields

STEP 5:
Click on the "Parent/Carer Details" tab to add the information required to complete the Early Years Pupil Premium (EYPP) check or to validate an eligibility code.

You must tick consent for EYPP and/or Working Family Eligibility in order to for a check to be completed.

NOTE: You do not need to include information on this tab if the child is not claiming extended hours or the parent has not provided the information required to complete an EYPP

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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

Forename

Surname

DOB

Email

Contact Number

NI or NASS Number

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

STEP 6:

Click on the "Funding Details" tab.

Click on the "Default Term Dates" button if the term dates are not populated.

Enter the number of weeks that the child is attending during this term. Further information on the number of weeks in a term can be found in the term funding pack sent by the FIS Team.

Note: This field will default to the maximum stretch weeks. Please ensure the correct number of weeks is entered.

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 then the child cannot access more than 10 hours per week funding.

Select Yes or No for the "Nominated for DAF" field (this is Disability Access Fund). Please add the relevant paperwork as per the DAF guidance in the Documents section.

Select "Stretching Entitlement" if the child is going to be stretching their funding for this term.

Maximum Values Allowed:	
Number of Weeks:	12.00
Funded Weekly Hours:	10.00
Funded Termly Hours:	120.00
Funded Yearly Hours:	380.00
Extended Weekly Hours:	10.00
Extended Termly Hours:	120.00
Extended Yearly Hours:	380.00

STEP 8: FUNDED HOURS

NOTE: The Universal Hours, Non-Funded Hours and Extended Hours fields are mandatory. Enter 0 if applicable.

STEP 9: EXTENDED HOURS

If the child is receiving extended hours at you setting please include these in the "Extended Hours" field and add the Eligibility Code.

Click on the "Check Eligibility Code" button to refresh the code information to confirm continued eligibility for funding.

STEP 10: Enter "Funded Entitlement Weeks" and/or "Expanded Entitlement Weeks" which are the number of weeks you would claim over one year e.g. 38 weeks if term time only.

STEP 11:

Click "Save" to save the record. 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.

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 "Edit Pending, Submitted". The status will revert to "Unchanged" once the claim has been accepted by the FIS Team.