



Provider Portal Guide

How to claim Early Years Funding and check
30 hours codes

A guide for Academies, Maintained
Nursery Classes, Private, Voluntary
and Independent School Providers.

The City of York Council Early Years Funding Portal is where you will submit your termly funding claims. This document will guide you through the funding process step by step.

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1) LOGGING IN TO THE PROVIDER PORTAL

To access the provider funding portal, you will need an internet browser of:

1. Mozilla® Firefox®, most recent stable version
2. Google Chrome™, most recent stable version
3. Safari on Windows, most recent stable version

- Open your internet browser and enter the following web address:
www.york.gov.uk/providerportal
- At the top of the page click on the link in the blue box marked **‘Please click here to login to the York Provider Portal for the early education funding and to update your details’**. Useful documents can be found on the right-hand side of the page.

The screenshot shows a web browser window with the URL www.york.gov.uk/workforce2014/Childcare%20Strategy/free-early-years-funding.htm. The page title is "Provider Portal and Funding Documents".

Left Sidebar (Workforce):

- Workforce
- Early Years and Childcare Service
- Quality Improvement Team
- Workforce
- Early Years Funding for 2, 3 and 4 year olds
- Provider Portal and Funding Documents
- Funding for 2 year olds
- Funding for 3 and 4 year olds
- Early Years Pupil Premium
- Provider Registration for Funded Places
- Early Years Inclusion
- Shared Foundation Partnerships

Main Content Area:

Provider Portal and Funding Documents

[Please click here to login to the York Provider Portal for the early education funding and to update your details](#)

- **Some two year old children**, whose families are in receipt of certain benefits, are entitled to **15 hours** of Funded Entitlement each week over 38 weeks per year. This is known as the two year old funding.
- **All 3 and 4 year old children** are entitled to **15 hours** of Funded Entitlement each week, over 38 weeks per year. This is known as the Universal 15 hours funding.
- **Some 3 and 4 year old children** are entitled to an additional 15 hours of Funded Entitlement. This is known as the **30 hours** Funded Entitlement.

Bottom Buttons:

- Term Deadlines and Provider Funding Letter +
- Making claims and using the Provider Portal +
- Provider Agreement and Provider Guide +

Right Sidebar:

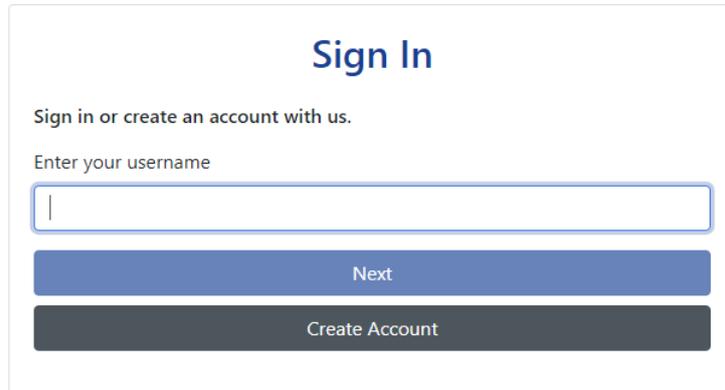
Related pages

- [Funding for 2 year olds](#)
- [Funding for 3 and 4 year olds](#)
- [Provider Registration for Funded Places](#)

Useful documents

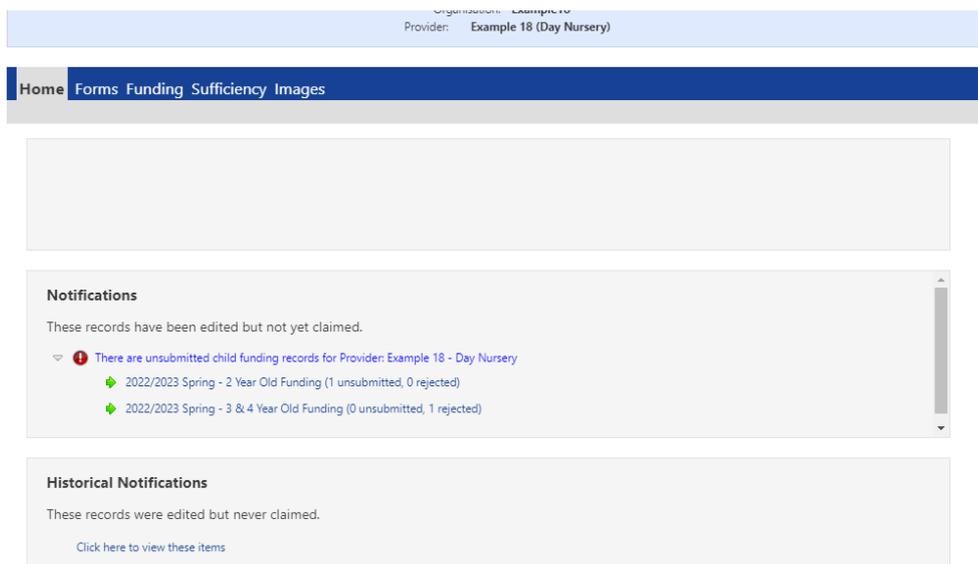
- [Provider Guide for the delivery of funded places - revised Feb 20](#)
- [Early Education and Childcare - Statutory guidance for local authorities - June 2018](#)
- [Early Years Entitlements](#)
- [Operational Guide for Local Authorities and Providers - Updated June 18](#)
- [30 Hours Information Sheet](#)

- Log in using your log in details that we have sent you via email.



The image shows a 'Sign In' form with a blue header. Below the header, it says 'Sign in or create an account with us.' There is a text input field labeled 'Enter your username' with a cursor inside. Below the input field are two buttons: a blue 'Next' button and a dark grey 'Create Account' button.

- Once you have logged in, you will be on the provider portal homepage (shown below). On the homepage you will find current information for providers.
- The homepage will also display messages such as the one below which indicates you have entered child details that you have not submitted to the Funding Team. It will also let you know if any claims have been rejected.



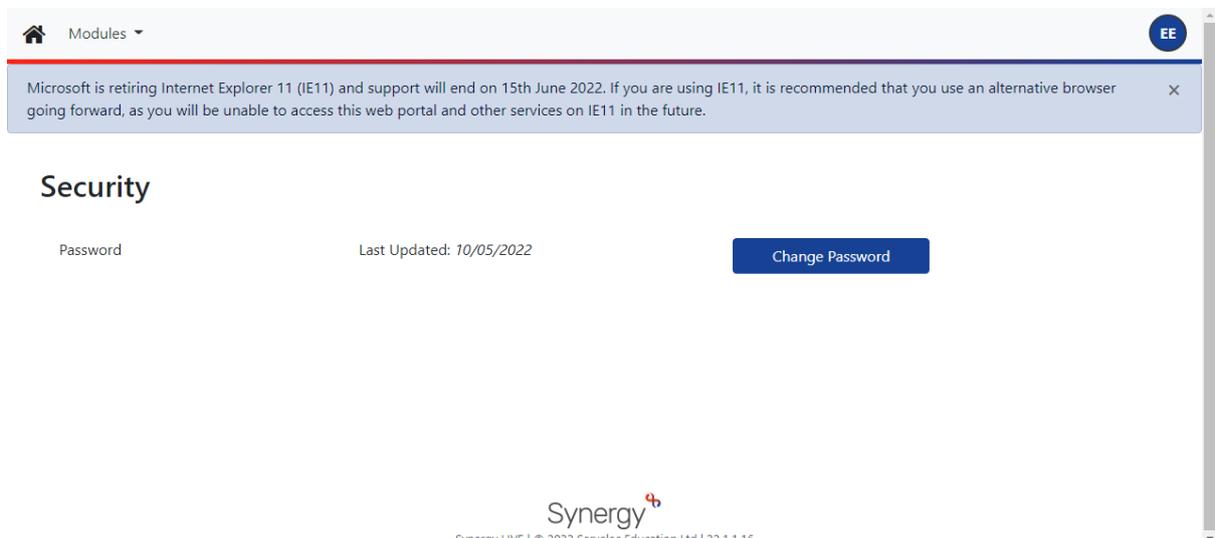
The image shows a screenshot of a provider portal homepage. At the top, there is a light blue header with the text 'Provider: Example 18 (Day Nursery)'. Below this is a dark blue navigation bar with the following links: 'Home', 'Forms', 'Funding', 'Sufficiency', and 'Images'. The main content area is divided into two sections. The first section is titled 'Notifications' and contains the text 'These records have been edited but not yet claimed.' Below this is a list of notifications: a red exclamation mark icon followed by 'There are unsubmitted child funding records for Provider: Example 18 - Day Nursery', and two green diamond icons followed by '2022/2023 Spring - 2 Year Old Funding (1 unsubmitted, 0 rejected)' and '2022/2023 Spring - 3 & 4 Year Old Funding (0 unsubmitted, 1 rejected)'. The second section is titled 'Historical Notifications' and contains the text 'These records were edited but never claimed.' Below this is a link that says 'Click here to view these items'.

2) CHANGING YOUR PASSWORD

- Change your password by clicking on the blue circle shown in the top right-hand corner of the picture below.
- Please note passwords are case sensitive however, usernames are not. Usernames have been set up with no spaces.

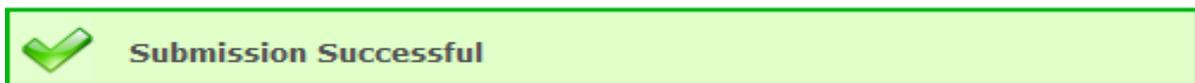
Password standards – should be a minimum of 8 characters, use a combination of letters, numbers, symbols, upper case and lower case, the more complex the better! Please remember this portal contains sensitive personal data about children.

- After you have clicked on the blue circle select account management and you will be taken to the page shown below where you can change your password.



The screenshot shows a web interface for account management. At the top, there is a navigation bar with a home icon, a 'Modules' dropdown menu, and a blue circular button labeled 'EE'. Below the navigation bar is a blue notification banner with the text: 'Microsoft is retiring Internet Explorer 11 (IE11) and support will end on 15th June 2022. If you are using IE11, it is recommended that you use an alternative browser going forward, as you will be unable to access this web portal and other services on IE11 in the future.' The main content area is titled 'Security' and contains the text 'Password' and 'Last Updated: 10/05/2022'. A prominent blue button labeled 'Change Password' is visible. At the bottom of the page, the Synergy logo is displayed, along with the text 'Synergy LIVE | © 2022 Servelec Education Ltd | 22.1.1.16'.

- Once the password has successfully been changed, you should see a green submission successful bar.



3) FUNDING ESTIMATES (TO ENSURE YOU ARE PAID YOUR 85% INTERIM PAYMENT AT THE START OF THE TERM)

- At the start of **every** new term, you **MUST** provide us with an estimate of the hours you will be claiming for the term for 2 year olds and 3&4 year old headcounts. We will email you your funding letter and details of when the portal is open. You should receive this email approximately two weeks before the start of the new term.
- We use the estimate you give us to work out your 85% upfront payment which we process in the first week of term. It is important that this estimate is as accurate as possible.
- The estimate needs to be entered as a weekly amount.

E.g., If you have 5 children doing 15 hours per week, you will enter 75 hours.

It is important to submit your estimate no later than the first day of a new term. As payments are processed during the first week of term, over or underestimated figures may result in an over or under payment that could be detrimental to the sustainability of your setting.

- If you have children on the stretched/flexible offer or a mixture of children on a term time and stretched offer. All children should be submitted as a term time equivalent figure. Further information can be found in the [New Stretched Offer Guide](#) which is available on our website.
- There are two separate headcounts and estimates should be submitted for all headcounts you have funded children for:
 - **2 Year Old Funding –**
 - You should provide an estimate for any eligible 2 Year Olds.
 - **3 & 4 Year Old Funding**
 - You should provide an estimate for **ALL** funded 3 & 4 year olds. Your total estimates weekly hours should include children eligible for the universal Funded Entitlement (15 hours) **AND** children eligible for the Extended Funded Entitlement (30 hours).

A. HOW TO SUBMIT YOUR ESTIMATES

- You will still need to enter an estimate, even if you have submitted your child details in the actual section.
- Select '**Funding**' (as shown below).
- From the submenus select '**Estimates**'.
- Select the relevant term.

The screenshot shows a web interface for 'Example 18 (Day Nursery)'. At the top, it displays 'Organisation: Example18' and 'Provider: Example 18 (Day Nursery)'. Below this is a navigation bar with 'Home Forms', 'Funding', and 'Sufficiency Images'. Under 'Funding', there are sub-menus: 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The 'Estimates' sub-menu is active. A 'Select Year and Term' dropdown menu is open, showing a list of academic years from 2022/2023 down to 2011/2012. The '2022/2023' year is selected, and the 'Spring' term is also selected.

The screenshot shows the 'Submit Estimate' form for '2022/2023 Spring - 3 & 4 Year Old Funding'. The form includes the following fields and buttons:

- Number of Weeks for this Term:
- Estimate Number of Funded Hours Per Week for this Term:
- Buttons: 'Calculate' and 'Send Claim'

Below the form, there is a note: 'Please enter both numbers. click 'Calculate', then 'Send Claim''.

- Input estimated weekly hours and select '**CALCULATE**'.

E.G. If you have 3 children attending 15 hours each per week and 1 child attending 30 hours each week, you will put 75 hours into the hours per week box and click '**CALCULATE**'.

- Total number of hours for the term will be calculated as in the picture below.

Organisation: **Example18**
 Provider: **Example 18 (Day Nursery)**

Home **Forms** **Funding** **Sufficiency Images**

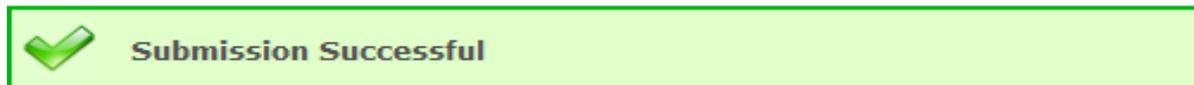
Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2022/2023 Spring - 3 & 4 Year Old Funding CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 950.25 Hours in this Term
 Please enter both numbers, click 'Calculate', then 'Send Claim'

- Click the blue box **'Send Claim'**



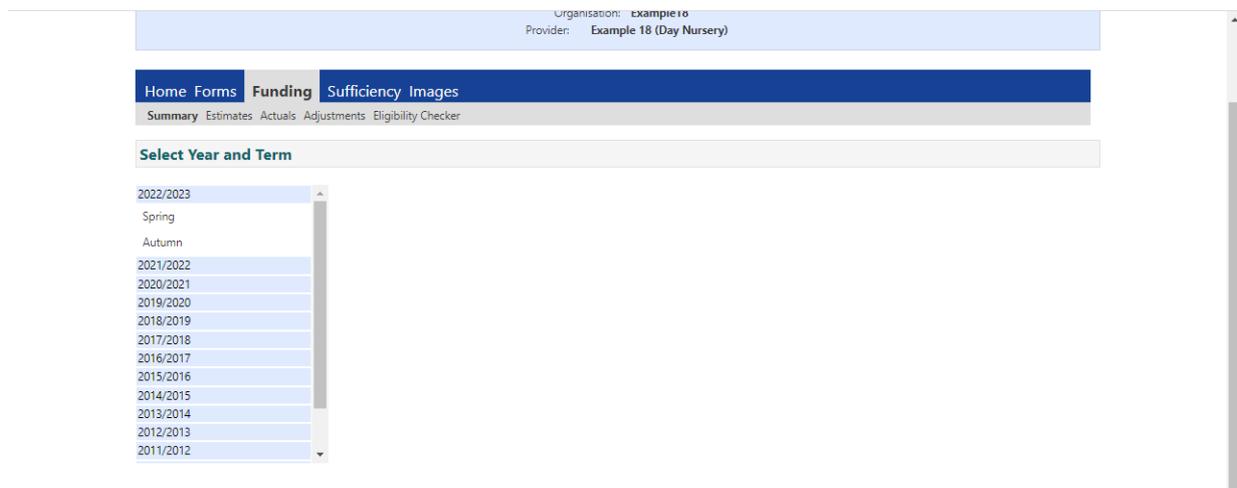
Please Note: If your estimated hours change after your original submission, you can re-submit if you wish, up until the deadline. If you do submit a further estimate, you need to submit the total amount for all children rather than just the new hours you are adding as your new estimate will overwrite your original estimate, i.e., you originally submitted an estimate of 75 hours, but a new child joins you for 15 hours per week then you would submit a revised estimate of 90 hours. If any new children join you and they were not included in your estimate submission, please ensure these children are added to your actuals headcount and you will receive the full amount of funding for these children as part of your balance payment.

4) SUBMITTING ACTUAL CHILD DETAILS

- Your final payment will be paid later in the term and will be based on the difference between your estimate and the Actual Child Data that you submit. You will be informed of the Actuals deadline date in the update emails you receive from earlyyearsfunding@york.gov.uk.

A. ADDING NEW CHILDREN

- You should enter **all** funded children onto the portal even if they are only accessing the universal entitlement. **Please ensure that the parent signs the Parental Declaration Form, giving their consent for you to share the information with the Local Authority.**
- From the home screen select **'FUNDING'** at the top of the screen.
- Within the **'FUNDING'** screen select **ACTUALS**.
- Select the relevant term.



The screenshot shows a web application interface for funding management. At the top, it displays 'Organisation: example18' and 'Provider: Example 18 (Day Nursery)'. Below this is a navigation bar with 'Home', 'Forms', 'Funding', and 'Sufficiency Images'. Under 'Funding', there are sub-tabs: 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A section titled 'Select Year and Term' contains a dropdown menu with the following options: 2022/2023, Spring, Autumn, 2021/2022, 2020/2021, 2019/2020, 2018/2019, 2017/2018, 2016/2017, 2015/2016, 2014/2015, 2013/2014, 2012/2013, and 2011/2012.

- Once you have selected the term and the headcount you wish to submit actuals for, you will be able to see your 'headcount' – this is where all the funded children's claims will sit and where you will enter all their individual child details. (In the example below, we have chosen the 3 & 4 year old headcount).

Organisation: Example18
Provider: Example 18 (Day Nursery)

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2022/2023 Spring - 3 & 4 Year Old Funding CHANGE

Add Child Send Claim

	Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	New, Unsubmitted Child	Little, Tommy (01-Mar-2019)	190.05	0.00	£815.31		
		Test, Test (23-Sep-2019)	190.05	0.00	£929.34	002	

Add Child Send Claim

- Click the Blue 'ADD CHILD' Box.

Child Details Tab

- On this tab, please fill in the details for the child you wish to add. Fields marked with an Asterix * are mandatory.

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Notes

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

Parent/Carer Details Tab

- You must complete this section if you would like to apply for the Early Years Pupil Premium (EYPP) for the child or if the child is entitled to the extended entitlement (30 hours).
- If the parent is claiming the extended entitlement with you, please complete the details on this tab in order to carry out an eligibility check for 30 hours. You will need to tick the 30 hours box confirming you have consent to check the code- this is a box that parent/carers will tick on their parent/carers declaration form.

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details 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.

Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.

Parent / Carer Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Partner Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Save Cancel *denotes mandatory fields

a) Applying for Early Years Pupil Premium (EYPP)

- **Please note EYPP is only payable on the Universal Entitlement Hours for Funded 3 & 4 Year Olds.**
- If the parent has signed the parent declaration form giving you permission to carry out an EYPP check you will need to enter the following data in the parent/carer tab:
 - Parent Surname
 - Parent's National Insurance Number,
 - Parent's Date of Birth
 - Please also ensure you tick the EYPP consent box.
- Children who are adopted from care or are on a child arrangement order or special guardianship are also eligible for EYPP however you will need to contact us at earlyyearsfunding@york.gov.uk with the child's details and confirmation that you have seen confirmation of the court order.
- Children in Care are automatically entitled to EYPP. These children are identified by the LA and EYPP is manually added by the Funding Team.

Funding Details Tab

- Finally, complete the details on the **FUNDING DETAILS** tab.
- If you click on the blue Default Term Dates box, the dates will automatically be entered for you. Weeks attended in the term will be 12.67 weeks. If the child is claiming a stretched offer, you will need to calculate the term time equivalent figure using the [New Stretched Offer Guide](#).
- The nominated for DAF (Disability Access Fund) box is a mandatory field and you must either click on the Yes or No button. Only tick the Yes box if the parent has completed the declaration form nominating you to receive the DAF payment.

- Working parents may be entitled to 30 hours and will need to apply via the [Childcare Choices](#) website. If eligible, parents will be issued an 11-digit code which they should include on their parent declaration form. Parents need to apply/renew by the following dates:

<u>Must Renew/Apply by:</u>	<u>Term eligible</u>
31 st December	Spring Term
31 st March	Summer Term
31 st August	Autumn Term

- It is important that you carry out an eligibility check on the code before offering the parent a 30 hours place. A check can be carried out by following the instructions below or by conducting a check through the Eligibility Checker Tab (see page 20).
- If the child is claiming any of the extended entitlement with you, you should then click the blue box marked **30 HOURS FREE CHILDCARE** towards the bottom of the funding details tab to validate the 30 hours eligibility code you have entered. Once you receive a positive eligibility check you will be able to **SAVE** the details. If you do not receive a positive eligibility check, you will only be able to enter Universal hours.

Notes Tab

- A notes tab is also available in the child record, and this allows you to make notes about the child’s funding claim which the funding team will be able to see once the claim has been sent.

Once you have completed all tabs within the child record, please SAVE your claim and this child will be added to the headcount.

B. AMENDING EXISTING CHILD DETAILS

- Eligible children from the previous term will have been carried forward but their funding hours will be set to 0. You will need to go into each child's record, check their details are still correct and enter the hours they want to claim for the current term.
- **The weeks attended in the term will be carried forward as the standard 12.67 weeks (38 weeks / 3 equal terms).**

- Click on the child's name to amend details.

- Check the 'Child Details' tab to ensure that the child's personal information is correct.
- Next, select the 'Funding Details' tab (see picture below and enter the number of weekly hours you are wanting to claim for (up to a maximum 15/30 hours). Weeks attended in the term will be 12.67 weeks. If you have children on the stretched/flexible offer or a mixture of children on a term time and stretched offer, all children should be submitted as a term time equivalent figure. Further information can be found in the [New Stretched Offer Guide](#) which is available on our website.

- The parent or guardian should have stated the amount of funded hours that they would like to claim with you on their parent declaration form. Please note that if the child is accessing some or all the extended entitlement then you will need to carry out a 30 hours eligibility check (see section on Checking 30 hours codes and Adding New Children). When you have checked and/or amended the child's details and funding information click '**Save**'.

The screenshot shows a web form with the following sections and fields:

- Funding Details:**
 - Start Date*: 03-Jan-2023
 - End Date*: 31-Mar-2023
 - Default Term Dates (button)
 - Weeks Attended in Term*: 12.67
 - Present during Census:
 - Attends Two Days or More:
 - Nominated for DAF*: Yes No
 - Universal Funded Hours per Week:
 - Universal Hours*: [empty field]
 - Extended Funded Hours per Week:
 - Extended Hours*: 0.00
 - 30H Eligibility Code: [empty field]
 - 30 Hours Free Childcare (button)
 - Eligible for 30H:
 - Total Funded Hours per Week:
 - Total Funded: 0.00
- Attendance Days:**
 - Attends Monday: Yes No
 - Attends Tuesday: Yes No
 - Attends Wednesday: Yes No
 - Attends Thursday: Yes No
 - Attends Friday: Yes No
 - Attends Saturday: Yes No
 - Attends Sunday: Yes No
- Non-Funded Hours per Week:**
 - Non-Funded Hours*: 0.00
- Maximum Values Allowed:** (highlighted in red)
 - Number of Weeks: 12.67
 - Universal Weekly Hours: 15.00
 - Universal Termly Hours: 190.20
 - Universal Yearly Hours: 570.20
 - Extended Weekly Hours: 15.00
 - Extended Termly Hours: 190.20
 - Extended Yearly Hours: 570.20

b. Half Term Claims

- If you have a child that is attending for half a term, (either the first half or second half) you should enter their hours by leaving the weeks per term at 12.67 but half the number of hours you are claiming.
- **Example:** A child attending 15 hours for half a term should be entered as 7.5 hours for 12.67 weeks. You should then add a note to the note tab, next to the funding details tab (see above) to let us know that the child is claiming 15 hours for half a term.

C. DELETING CHILD DETAILS

- If a child has left your setting, click on the 'x' or backwards arrow next to their name on the Actuals headcount.

Organisation: Example18
Provider: Example 18 (Day Nursery)

Home Forms Funding Sufficiency Images

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2022/2023 Spring - 3 & 4 Year Old Funding CHANGE

Add Child Send Claim

	Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
🔴	↩️	New, Awaiting LA Download Little, Tommy (01-Mar-2019)	190.05	0.00	£815.31		
🔴	↩️	New, Unsubmitted Child Smith, Daisy (02-Feb-2019)	190.05	0.00	£815.31		
	✕	Test, Test (23-Sep-2019)	190.05	0.00	£929.34	002	

Add Child Send Claim

- Once you have clicked on the x, you will be asked if you would like to delete the child.
- Select **YES** to delete the child. If you have pressed delete in error, you can rectify this by clicking No.
- The status will change to **Awaiting LA Deletion**.

Please Note:

Requests to delete children are automatically submitted even if you do not click on the **Send Claim** button, however it is still possible to cancel the deletion at this stage providing we have not accepted the deletion. You can do this by clicking on the backwards arrow icon next to the child's name and it will ask you if you want to cancel the deletion of the child.

- Once we have accepted the deletion the child will disappear from your headcount screen. If at this stage, you realise you have deleted a child in error, and we have accepted the deletion you will need to add the child as a new child.

5) SENDING YOUR FUNDING CLAIM TO THE LA

- When you have completed the details for all the funded children in your setting you will see a complete headcount list on the **ACTUALS** Tab.
- The status of the children's claims will be '**Unsubmitted Claim**' as this means the claim has not been submitted to the funding team.
- Once you have verified that all the children are present on your headcount. You should click on the blue box marked **SEND CLAIM**. The information will then be submitted to us. You should see the green **SUBMISSION SUCCESSFUL** box.



- Once the claims have been submitted, the status on the children's records should change to '**Awaiting LA Download**'.
- When the claims have been approved by the funding team, the status of the child record will then be blank.
- If you have any children that have a status of '**unsubmitted claim**', please ensure you press the '**send claim**' button. When there are no further updates that need to be sent to the funding team, the 'send claim' button will be greyed out.
- You have now submitted your funding details to the team. If you need to add further details, e.g., if a child starts later in the term, you can do this up until the funding deadline for the term by adding the child as described above and then press **SEND CLAIM** again and the new information will be sent through to us.

Example: You have entered a child as attending 25 weeks however this is an error and you should have claimed for 20 hours. You will need to go back into the child's record, amend the funded hours, save your claim and then resubmit your claim by pressing the 'send claim' button. The funded hours you have claimed for will have then changed to 20 hours as the system will override the original submission.

If you have any questions regarding adding children later in the term you can **contact us on 01904 553880**.

6) WEIGHTINGS COLUMN – EYPP AND DEPRIVATION SUPPLEMENTS

- We carry out the eligibility check for EYPP every 2 weeks. If a child is eligible for EYPP then 002 will be shown in the Child Weightings column shown below. Please note that EYPP is only paid on the first 15 universal hours.
- If the Child Weightings tab shows 001 this means that the child is eligible for the deprivation supplement. Deprivation is paid on all universal and extended hours. The deprivation supplement is based on the child's postcode and is automatically added to eligible children's records once the claim has been imported by the Funding team.

Organisation: example 10
Provider: Example 18 (Day Nursery)

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2022/2023 Spring - 3 & 4 Year Old Funding CHANGE

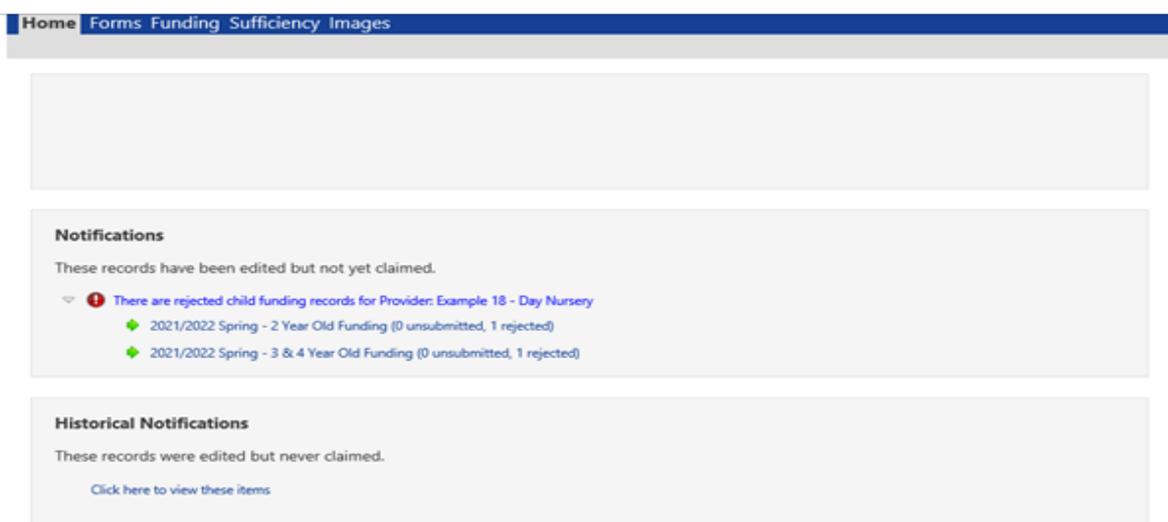
Add Child Send Claim

	Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
🚩	↪ New, Awaiting LA Download	Little, Tommy (01-Mar-2019)	190.05	0.00	£815.31		
🚩	↪ New, Awaiting LA Download	Smith, Daisy (02-Feb-2019)	190.05	0.00	£815.31		
✖		Test, Test (23-Sep-2019)	190.05	0.00	£929.34	002	

Add Child Send Claim

7) CLAIM REJECTION

- If a claim is rejected by the Funding Team a notification will appear on the Provider's portal homepage stating 'There are rejected child funding records for Provider' and then goes on to list the Term and the headcount in which there is a rejected claim.



The screenshot shows a navigation bar with 'Home', 'Forms', 'Funding', 'Sufficiency', and 'Images'. Below this is a large grey rectangular area. Underneath, there is a 'Notifications' section with the text 'These records have been edited but not yet claimed.' It lists two items: 'There are rejected child funding records for Provider: Example 18 - Day Nursery' with a red warning icon, and two sub-items: '2021/2022 Spring - 2 Year Old Funding (0 unsubmitted, 1 rejected)' and '2021/2022 Spring - 3 & 4 Year Old Funding (0 unsubmitted, 1 rejected)'. Below this is a 'Historical Notifications' section with the text 'These records were edited but never claimed.' and a link 'Click here to view these items'.

Reasons a claim may be rejected:

- No evidence to suggest that a child is eligible for 2 year old funding as there is no voucher code. In this instance, providers are encouraged to check with parents/carers if the child is eligible for 2 year old funding and retrieve the voucher code. If a child has been approved for 2 year old funding by another local authority, we ask that a copy of the approval letter be sent to earlyyearsfunding@york.gov.uk so that the funding team can authorise eligibility.
- An over claim of funding with another provider. You will need to speak with the parent/carer to determine the number of funded hours that should be claimed at each provider.

Providers are encouraged to check the appropriate headcount for their 'Actuals' data and the status of the child's record will have changed to '**Claim Rejected**'.

Organisation: **Example18**
Provider: **Example 18 (Day Nursery)**

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2021/2022 Spring - 2 Year Old Funding CHANGE

Add Child Enter EY Voucher Send Claim

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
!	↻	Claim Rejected	Billie, White (01-Jan-2019)	190.05	£1018.67	
!	↻	New, Awaiting LA Download	Test, Amy (02-Jan-2019)	190.05	£1018.67	

Add Child Enter EY Voucher Send Claim

By clicking on the child's name in blue, the Summary page of the child's record will show a red text box and provide you with a reason as to why the claim has been rejected.

Home Forms **Funding** Sufficiency Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Name: White Billie DOB: 01-Jan-2019

Summary Child Details Parent / Carer Details Funding Details Notes

Term Start Date	04-Jan-2022	Universal Funding	
Term End Date	08-Apr-2022	Funded Hours Per Week	15.00
No of weeks attended	12.67	Funded Hours for Term	190.05
Provider Total Rate	£5.36		
Claim Rejected	Cannot find evidence that this child has been approved for the 2 year old funding. Please either provide a voucher code or letter confirming their eligibility		
	Funding Amount @ Provider Rate		£1018.67
	Child Weightings		£0.00
	Universal Funding Amount		£1018.67
	Totals		
	Funded Hours Per Week		15.00
	Funded Hours for Term		190.05
	Total Funding (excl. Adj)		£1018.67
	Total amount from Adjustments		£0.00
	Total amount from Pending Adjustments		£0.00
	Total Funding For Term (inc Adj)		£1018.67

- At this point it may be that the provider needs to get further information from the parent/carer about a 2 year old voucher code or even if there is an over claim of funding. Once the relevant information has been obtained and the problem is solved, **the claim can be submitted again** in the usual way. **Please also add a note to the child's record to explain the outcome.**

8) ELIGIBILITY CHECKER TAB – 30 HOURS CODES

- If you would like to check that a code is eligible for children that may be joining you in the current/future terms but do not want to add them to the headcount at this stage, you can do this by using the eligibility checker tab which links to the Department for Education Eligibility Checking System. The eligibility checker will only allow you to check the validity of a code.
- You must check the dates on the code to determine if it is eligible for the term you are wishing to claim funding for. This check will not store any information about the family within the Provider Portal and **you will need to carry out the check again when you want to add the child to your headcount data for the term.**

Parents should bring their 11-digit eligibility code to their childcare provider, along with their national insurance number, parent surname, and child's date of birth. The 11-digit eligibility code should be recorded on the parent declaration form which should be retained by the provider for four terms in case of audit or overclaims.

- At the top of the home page select '**FUNDING**'
- Then click on the '**Eligibility Checker tab**'

The screenshot shows the top navigation bar with a home icon and 'Modules' dropdown. A notification banner at the top states: 'Microsoft is retiring Internet Explorer 11 (IE11) and support will end on 15th June 2022. If you are using IE11, it is recommended that you use an alternative browser going forward, as you will be unable to access this web portal and other services on IE11 in the future.' Below this, the user's organization is identified as 'Example18' and the provider as 'Example 18 (Day Nursery)'. A menu bar contains 'Home', 'Forms', 'Funding', and 'Sufficiency Images', with 'Funding' selected. Under 'Funding', there are sub-links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The 'Eligibility Checker' section contains the text: 'Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.' Below this is a 'Data Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system.' At the bottom of this section is a blue button labeled '30 Hours Free Childcare'.

- Click on the blue 30 Hours Free Childcare tab and enter your parent details into the pop-up menu. Fields marked with an Asterix* are mandatory. Parents will need to provide you with the following in order for you to check the validity of the code: -
 - A 30 hours eligibility code
 - The parents National Insurance number
 - The child's date of birth
- You will need to tick the Eligibility Check button confirming you have parent consent to check the code.

30 Hours Free Childcare

Please enter a valid Eligibility Code and Child Date of Birth, together with Parent/Carer Details. Partner Details are optional but if entered then all fields, except Forename, must be filled in.

Eligibility Code*

Child Date of Birth*

Parent/Carer Forename

Parent/Carer Surname

Parent/Carer NI Number*

Consent must be given for this Eligibility Check

Partner Forename

Partner Surname

Partner NI Number

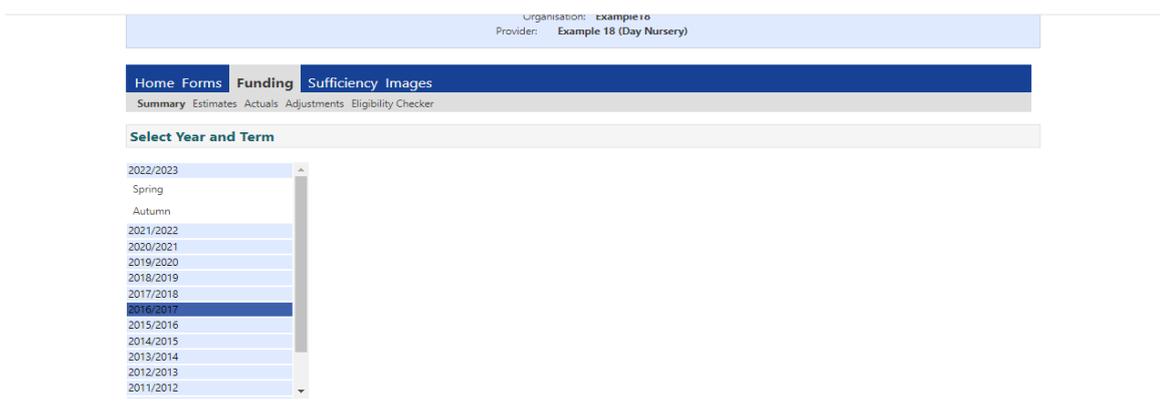
*denotes mandatory fields

- Once you have completed the form, click on the blue **'submit'** box at the bottom of the form.
- The system will now link to the Eligibility Checking Service to verify the validity of the code. This may take a few moments.
- If the code is found to be eligible you will be shown a start date and end date – if the end date of the code is before the start of the term you want to claim for the child, then the parent/carer must renew their code before they can take up the extended entitlement.
- New children cannot take up the extended entitlement if their code is already in their grace period, therefore you will need to prompt the parent to renew the code asap.

9) VIEWING PAYMENT AND STATEMENT INFORMATION

Providers can view up to date payment information for the current term and details of payments from previous terms.

- Select the Funding tab, then 'Summary' from the sub menu.



- Select the term you would like to access.

The screenshot shows two side-by-side summary pages: 'Estimates' and 'Actuals'. Both pages display the following information:

Estimates		Actuals	
Term Length (Weeks)	12.67	Term Length (Weeks) Term Time	12.67
▶ Provider Rate applied	£4.29	▶ Provider Rate applied to child funding	£4.29
Estimate Funding		Universal Funding	
Hours Per Week	0.00	Funded Hours for Term	190.05
Term Funding Amount	£0.00	Funding Amount @ Provider Rate	£815.31
Interim %	85.00%	▶ Child Weightings Total	£114.03
Interim Amount Payable	£0.00		
Total Interim Amount Paid to Date (before Adj)	£0.00	Universal Funding Amount	£929.34
		Extended Funding	
Interim Amount Payable Balance	£0.00	Funded Hours for Term	0.00
		Funding Amount @ Provider Rate	£0.00
		Extended Funding Amount	£0.00
		Totals	
Processed	No	Funded Hours for Term	190.05
Processed Date		Funding Amount @ Provider Rate	£815.31
		Child Weightings	£114.03
		Term Funding Amount	£929.34
		Interim Amount Paid (before Adj)	£0.00
		Term Funding Amount Balance	£929.34

- Within the summary page you can view all payments made for the current term or previous terms. You will also see any deductions that we have made for overpayments of funding from previous terms.

Please Note

The summary page will show the processed date of estimates or actuals. This is the date that the team have sent the details to the creditor team for payment; this is **not** the date that the money has been paid to your account. It can take up to 10 working days from the date shown in the provider portal for the money to reach your account.

A) VIEWING CHILD SUMMARY DETAILS

- You can see a summary of the funding for each individual child by selecting the relevant headcount and clicking on their name in the list.

Summary Estimates Actuals Adjustments Eligibility Checker	
Name: Test Test DOB: 23-Sep-2019	
Summary Child Details Parent / Carer Details Funding Details Notes	
Term Start Date	03-Jan-2023
Term End Date	31-Mar-2023
No of weeks attended	12.67
Nominated for DAF	No
▶ Provider Total Rate	£4.29
Universal Funding	
Funded Hours Per Week	15.00
Funded Hours for Term	190.05
Funding Amount @ Provider Rate £815.31	
▼ Child Weightings £114.03	
Eypp (£0.60)	£114.03
Universal Funding Amount £929.34	
Totals	
Funded Hours Per Week	15.00
Funded Hours for Term	190.05
Total Funding (excl. Adj)	£929.34
Total amount from Adjustments	£0.00
Total amount from Pending Adjustments	£0.00
Total Funding For Term (inc Adj) £929.34	

- The Summary screen will show the number of universal and extended hours claimed and the amount of funding as well as any weightings that the child attracts.

10) ADJUSTMENTS

- Within the adjustments tab you will be able to view information about any over payments of funding outstanding at the end of the term. Money that you owe to us will be shown in brackets.

E.g., If your interim payment was more than the total of your actual claim by £150.23, you will be able to see this on the adjustments tab as (150.23). You can click on the arrow next to this to see more details about the adjustment.

- In the event of an over claim of funding on your account, we will where possible deduct this from balances owing on your other headcounts. If you have an over claim that we are unable to take back from your balances owing, we will write out to you to let you know the amount you will be invoiced for.
- Disability Access Fund payments will be included in your balance payment and will show in your adjustments tab.

11) FREQUENTLY ASKED QUESTIONS

SECTION 1: ACCESS TO SYSTEM & PASSWORDS

1. What do I do if I forget my username or password?

Please contact us via email to earlyyearsfunding@york.gov.uk and we can reset your username or password and send you instructions to login. Please note, we will only be able to accept changes from your registered email address. If you do not have access to this email address, please call us on 01904 553880 so we can verify your details.

2. Will each member of staff that will use the system have their own login?

Each provider is given only one username and password for the setting, so all users will login with this username and password.

3. How do I change my password?

You can change your password by logging in to the provider portal and following the changing your password procedure. Please see page 5 for further instructions.

4. What if a member of staff leaves who has access to the online system and knows the password?

You should change the password immediately to ensure only authorised members of staff and management have access to the system. If you do not have the login and password details, you should contact the earlyyearsfunding@york.gov.uk to have the username and password reset.

SECTION 2: DATA QUALITY

5. Who is responsible for the quality and accuracy of the child data entered into the online system?

The person entering the child data from your setting is responsible. Please try to ensure that you have the child's full details, including full name, full address and postcode and legal surname. It is good practice to use the information the parent has provided on the parental declaration form to ensure the information you are providing is accurate and correct. We would encourage you to check the online funding portal regularly throughout the term to ensure that the information you have submitted is correct and that any changes or amendments that you have made have been agreed by us.

SECTION 3: FUNDING AND CLAIM DETAILS

6. Do I need to submit a funding estimate online every term?

Yes, you will need to put an estimate of total weekly hours into the online portal for us to calculate your interim payment. You will need to submit this estimate by the estimate deadline (see your funding letter for details). Failure to do this may result in your interim payment being delayed.

7. What figure should I enter for weeks attended in term?

If a child is attending for a full term you should enter 12.67 weeks. If a child is attending for half a term you leave the weeks attended as 12.67 but half the number of hours you are wanting to claim for i.e., a child is claiming 15 hours for half a term you would enter the weeks attended as 12.67 and enter 7.5 weekly hours.

8. What should I do about children who are stretching their entitlement across the year?

If you have children who are stretching their funded entitlement, they should be claimed for as a term time equivalent figure. When submitting your actual data for a child doing the stretched offer you should calculate your weekly term time equivalent funded hours as described in the New Stretched Offer Guide.

For more information about stretching the entitlement, please see the [New Stretched Offer Guide](#) which is available from our website.

9. What should I enter for a child who is attending different hours in the second half of term to the first half of term?

As with question 8 above, the funding portal cannot accommodate children attending different hours in the first half of term to the second half of term. You will need to enter these children by adding together the hours they are attending in the first half of term and second half of term, then divide the total by two, then enter this figure in the funded hours box for a full term (12.67 weeks). See example below:

Example

Child A wants to attend 6 hours for the first half of term and then increase to 15 hours in the second half of term.

6 hours + 15 hours = 21 hours divide by 2 = 10.5 hours

Funded hours should be entered as 10.5 hours for 12.67 weeks.

You will then need to add a note in the notes tab letting us know that the child is attending 6 hours for the first half of the term and then increasing to 15 hours for the second half of term.

10. What figure should I enter for funded hours per week?

Children who are eligible for the extended entitlement can claim a maximum of 30 hours per week and should be entered onto the 3&4 year old funding headcount. The child's parent or guardian should state the amount of funded hours they would like to claim at your setting on the parent declaration form. They can split their funded hours over a maximum of 2 sites in any one day and a maximum of 10 hours can be claimed in one day.

Non-eligible children are entitled to a maximum of 15 hours per week and should be entered onto the 3 & 4 year old funding headcount. They can split their funded hours over a maximum of 2 sites in any one day and a maximum of 10 hours can be claimed in one day.

What figure should I enter for non-funded hours per week?

As with the funded hours you should enter the number of hours the child attends the setting over and above the funded hours they are claiming. E.g. If the child attends 8:00 – 17:00 (45 hours) five days per week and you are claiming 15 funded hours, then the non-funded hours would be 30.

11. We have a child starting in the second half of the term; can we claim for that child?

Yes, you can claim for a child starting in the second half of the term in the same way you claim for a child starting in the first half of the term. See FAQ 7. Children starting in second half of the term need to have their details submitted before the claim submission deadline.

12. What do I do if a child for whom we have claimed funding for this term leaves?

If a child leaves your setting after the funding deadline, you should notify us as soon as possible via email or by calling 01904 553880, so we can provide advice on your claim.

1. What happens if I cannot submit my claim before the claim submission deadline?

Late claims will not usually be accepted unless there are extenuating circumstances. If you think you may have a problem submitting on time, please contact us on 01904 553880. Failure to submit your funding claim on time on multiple occasions may result in an administrative charge due to the extra work this causes for the team.

13. Can I make amendments to my claim after the claim submission deadline?

Once the submission deadline has passed, the portal will be closed for further amendments. We do however give providers the opportunity to double check their funding claims before balance payments have been processed – we will email providers the deadline for checking claims. You will need to contact us on 01904 553880 if you need to make any amendments.

14. Will the system tell me if I have made an error e.g., date of birth out of eligible range?

Yes, within the **add new child** field, if the child does not have a valid date of birth, an error message will show when you try to save the information. The error message will give details of the field which has the invalid information.

15. Will the online system give me a warning if another provider has claimed for a child?

No, if there is an overclaim of hours between two providers your claim may be rejected, and you will need to take actions to resolve this overclaim. It is important that you discuss the funding with the parents so that they understand the funding and ensure that the parental declaration form is filled in accurately as this will highlight if they are attending another provider.

SECTION 4: PARENT DECLARATIONS

16. Do Parental Declaration Forms have to be in place for all funded children?

Yes, Parent Declarations should be completed and signed by the parents when a child first claims a funded early education place with your setting. In subsequent terms, it is important to check with parents that nothing on the declaration form has changed. If all details remain the same as for the previous term, the parent only needs to re-sign for the new term under the Parental Declaration section. If, however, the number of funded early education hours taken does change then a new Parent Declaration Form needs to be completed.

17. Why do we have Parent Declaration forms?

The Statutory Guidance for Local Authorities on the delivery of the funded Early Education for Two, Three and Four Year Olds states that local authorities should support providers to establish parental declarations. These should set out the hours and patterns of access of the funded early education place.

If you would prefer to have paper declaration forms, you can create your own online version however these must include all aspects and information as the City of York Council parent declaration forms as well as the Privacy Notice.

City of York Council auditors, Veritau, may visit your setting to audit your claim information. They will expect to see Parent Declarations and all other paperwork pertaining to the free early education places.

18. How long do we have to keep parental declarations?

We advise that providers keep declarations for the current term and one year prior to this.

Contact us

Education Support Service
City of York Council
West Offices
Station Rise
York
YO1 6GA
Tel: 01904 553880

earlyyearsfundings@york.gov.uk