

# GUIDANCE ON COMPLETING THE 2-YEAR-OLD FUNDING HEADCOUNT TASK

EARLY YEARS PROVIDER PORTAL

## CONTENTS

<b>Summary tab</b> .....	1
<b>Estimates tab</b> .....	2
<b>Actuals tab</b> .....	2
<b>Adjustments tab</b> .....	3
<b>Eligibility Checker tab</b> .....	3
<b>How to complete your 2 year old headcount</b> .....	3
<b>Adding a record for a new 2 Year Old</b> .....	4
<b>Amending an existing 2 Year Old</b> .....	4
<b>Child Details tab</b> .....	5
<b>Parent/Carer Details tab</b> .....	6
<b>Funding Details tab</b> .....	6
<b>Documents tab</b> .....	7
<b>Notes Tab</b> .....	8
<b>Saving the Individual Child Entry</b> .....	8
<b>How to Delete a Child</b> .....	9

## Overview of the 2 year headcount form

After logging in to the system, from the homepage click on the Funding tab. This is where you will add all your 2-year-old children and complete all headcount claims. Please select the appropriate funding period and which age range is required.

Under the Funding heading there is a second toolbar with sub-headings for Summary, Estimates, Actuals, Adjustments and Eligibility Checker.

### Summary tab

You can see a complete overview of your funding for the period you have selected. view the funding you are due to receive for the period. This includes the rate per hour, the Estimate Payment (formally Initial Payment) received and will show any Adjustments.

In this tab, you can view the period length, if a claim has been processed and the date the claim was processed.

The screen below shows 2022-2023 Autumn – 2-year-old funding, but if you require 3- & 4-year-old funding click on the word 'CHANGE' as circled below, which will then take you back to the list of provider Headcount Records, where you can select the relevant period and age range.

Home Forms Funding	
Summary Estimates Actuals Adjustments Eligibility Checker	
Summary: 2022 - 2023 Autumn - 2 Year Old <b>CHANGE</b>	
Rate x Hours may not equal Totals as rounding is applied per child. The totals shown are the sum of the funding amounts per child.	
Estimates	Actuals
Term Length (Weeks)	Term Length (Weeks) Term Time
15	15
▶ Provider Rate applied	▶ Provider Rate applied to child funding
£5.27	£5.27
Estimate Funding	Universal Funding
Hours Per Term	Funded Hours for Term
0.00	900.00
<b>Term Funding Amount</b>	<b>Funding Amount @ Provider Rate</b>
<b>£0.00</b>	<b>£4743.00</b>
Interim %	
100.00%	
<b>Interim Amount Payable</b>	<b>Universal Funding Amount</b>
<b>£0.00</b>	<b>£4743.00</b>
<b>Total Interim Amount Paid to Date (before Adj)</b>	<b>Totals</b>
<b>£0.00</b>	Funded Hours for Term
	900.00
	<b>Funding Amount @ Provider Rate</b>
	<b>£4743.00</b>
	<b>Child Weightings</b>
	<b>£0.00</b>
<b>Interim Amount Payable Balance</b>	<b>Term Funding Amount</b>
<b>£0.00</b>	<b>£4743.00</b>
	Interim Amount Paid (before Adj)
	£0.00
	<b>Term Funding Amount Balance</b>
	<b>£4743.00</b>
	Adjustments Paid with Final Payment
	£0.00
Processed	
Processed Date	<b>Actual Amount Paid (Inc. Adj)</b>
No	<b>£0.00</b>

On the **Estimates column** you can view the total amount to be paid and how much is still outstanding to be paid based on the upfront % payment.

On the **Actuals column** you can view if the claim has been processed This payment will still not reach your bank account until the final payment date specified on the FEEE calendar.

## Estimates tab

Submit your Estimate hours that you expect to claim in the new period. Click on the **Estimates Tab** and select the relevant academic year, period and funding type.

Enter or update the number of hours accordingly, then click on 'Send Claim'.

The Estimates screen will open as below:

Organisation: **Little Playgroup**  
Provider: **Little Playgroup (Pre-School Playgroup)**

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Estimate: 2022 - 2023 Autumn - 2 Year Old CHANGE

Estimate Number of Funded Hours for this Term   
Please enter a number, then 'Send Claim'

Send Claim

## Actuals tab

The Actuals tab will identify a pre-populated list of children that have been carried forward from the previous period who are age eligible for the current period and this will be what you use to complete your headcount task.

Organisation: **Little Playgroup**  
Provider: **Little Playgroup (Pre-School Playgroup)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2022 - 2023 Autumn - 2 Year Old CHANGE

Add Child Enter EY Voucher Send Claim

Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
X	Suggs, Peter (05-Jun-2020)	225.00	£1185.75	
X	Towers, Kitty (25-Jun-2020)	225.00	£1185.75	
X	Walker, Jacob (05-Jul-2020)	225.00	£1185.75	
X	Walker, Jasmine (05-Jul-2020)	225.00	£1185.75	

Add Child Enter EY Voucher Send Claim

To be able to view a summary of the child's funding, click on their name and you will see the following screen:

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Master: Peter Suggs DOB: 06-Jun-2020

Terms Start Date: 01-Sep-2022  
Terms End Date: 31-Dec-2022  
No. of weeks attended: 91

Provider Total Rate: 25.27

Category	Amount
Universal Funding	
Funded Hours for Week	15.00
Funded Hours for Term	225.00
Funding Amount @ Provider Rate	£1185.75
Child Weightings	85.00
Universal Funding Amount	£1185.75
Titals	
Funded Hours for Week	15.00
Funded Hours for Term	225.00
Total Funding (inc. Adj)	£1185.75
Total amount from Adjustments	0.00
Total amount from Pending Adjustments	0.00
Total Funding For Term (inc Adj)	£1185.75

Save Cancel

## [Adjustments tab](#)

To complete your adjustment/amendment task, you will need to click on Adjustments.

## [Eligibility Checker tab](#)

To validate a child's 30-hour eligibility code, click in here. (This is not needed as part of the 2-year funding, as this age group is not eligible for 30 hours but it will still appear on the sub-header.)

## [How to complete your 2 year old headcount](#)

From the Funding heading, click on Actuals in the sub-header.



- As time goes by, you will see multiple years and periods of previous and future headcounts. When the current headcount is open, there will be a green paper aeroplane next to the period you need to complete. You can also refer to the FEEE calendar for the dates that the headcount task will be open and you will be notified by email. To complete the 2-year headcount, you will need to select the academic year and period and click on '2-Year-Old' under Funding Type.

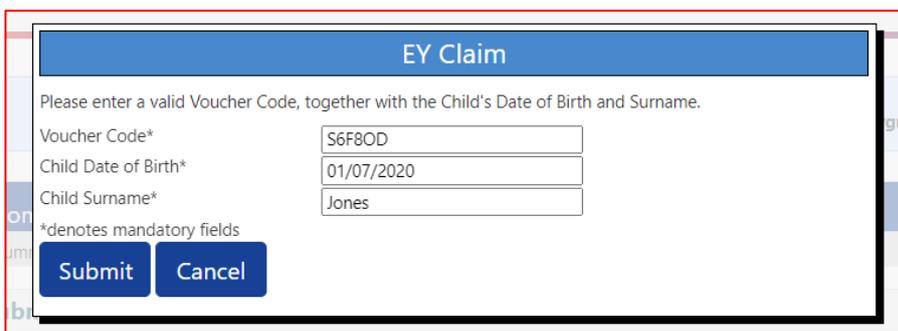
2022-2023
 Autumn
Submission Period: 06-Oct-2022 to 31-Dec-2022

		Actuals (Office use only)		
	Funding Type	Ready To Process	Processed	Editable
	<a href="#">2 Year Old</a>			
	<a href="#">3 &amp; 4 Year Olds</a>			

## Adding a record for a new 2 Year Old

Please ensure that all mandatory fields, which are marked by an \*, are completed before submission, as failure to do so will result in you not being able to submit your funding claim.

If the child is new and has a 2-year code from Leicestershire County Council, you will need to click on Enter EY Voucher and enter the code, the child's date of birth and their surname as per the screenshot below. Once these details have been entered, please press Submit.



The screenshot shows a web form titled "EY Claim". Below the title is a blue header bar with the text "EY Claim". Underneath the header, there is a instruction: "Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname." The form contains three input fields: "Voucher Code\*" with the value "S6F8OD", "Child Date of Birth\*" with the value "01/07/2020", and "Child Surname\*" with the value "Jones". Below these fields is a note: "\*denotes mandatory fields". At the bottom of the form are two buttons: "Submit" and "Cancel".

Please do not click on the Enter EY Voucher button if the 2-year code is from a different local authority as the system will not recognise it. In these instances, you should click on the Add Child button and enter all mandatory fields (this button will be at the top and the bottom of your list of children (if you have claimed for children previously)).

You will also need to upload a copy of the child's 2-year funding code from the other local authority by clicking on the Documents tab and uploading the file. Please note, if the evidence is not uploaded, we will reject your claim.

## Amending an existing 2 Year Old

Select the child that you want to update and then follow the process below, making sure that all the mandatory fields are completed. (Please note that existing children will have some fields automatically populated. These fields are only to be amended, if the child's circumstances have changed, i.e. changed address.)

## Child Details tab

Organisation: **Holly Folwell**  
Provider: **Holly Folwell (Childminder)**

Home FormsFunding

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents 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

You will need to complete the following (some of these fields will automatically be populated from when the parent/carer applied for the 2-year funding in the Parent Portal):

- You need to complete all the fields for the child's legal name (as per their birth certificate, Passport, medical card, or Adoption Certificate).
- Complete the child's date of birth using the calendar that will pop up when you click on the date of birth field.
- You can ignore the 'Proof of DOB' box if you wish but please note that birth identification will be needed before making a claim as per the Provider Agreement.
- Tick Male or Female in the Gender box.
- You can complete the Preferred Surname box if the child has another name they use.
- Choose the correct Ethnicity from the drop-down selection when you click on the arrow.
- Please do not complete the SEN COP Stage section.
- In the Search for an Address box, you should add the house number/name in the Primary box and the postcode in the Postcode box, and then click on Search. The address should automatically be populated in the full address section below – click on Confirm once inputted. Please note that if you do not include a house number/name, the system should give you a choice of addresses to select, but if there are lots of houses on that road, it may not give you any options. If the address cannot be found, enter the address manually and confirm once inputted.
- You cannot Save the record at this point. You must wait until all required fields on the other tabs have been completed.

## Parent/Carer Details tab

If you have permission from the parent/carers to enter their details, this is optional.

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Peter Suggs DOB: 06-Jun-2020

Summary Child Details Parent / Carer Details Funding Details Documents Notes

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

**Partner Details**

Forename

Surname

DOB

NI or  NASS Number

Save Cancel \*denotes mandatory fields

- Complete the fields for the Forename, Surname and Date of Birth of parent/carers. You can also submit partner details if you wish.
- Tick NI (National Insurance) or NASS (National Asylum Support Service) Number as appropriate and enter the information.

## Funding Details tab

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Peter Suggs DOB: 06-Jun-2020

Summary Child Details Parent / Carer Details Funding Details Documents Notes

**Funding Details**

Start Date\*

End Date\*

Weeks Attended in Term\*

Present during Census

Attends Two Days or More

**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

**Universal Funded Hours per Week**

Universal Hours\*

**Non-Funded Hours per Week**

Non-Funded Hours\*

**Maximum Values Allowed:**

Number of Weeks: 15

Universal Weekly Hours: 15.00

Universal Termly Hours: 225.00

Universal Yearly Hours: 570.00

Save Cancel \*denotes mandatory fields

This is where you need to input the hours and weeks that you wish to claim for in line with the signed PSOU (Parental Statement of Undertaking).

The Start and End Date boxes will be populated if you select the Default Term Dates box – this is if you are claiming for the full period. If the child starts later or finishes earlier in the period, you will need to amend the dates manually using the calendar that appears when you click in the box. You will also need to adjust the start date and weeks claimed in line with the 2-Year-old funding start date if the eligibility code has been applied for after the beginning of the funding period.

Complete the Weeks attended in Term section. This should be the amount of weeks you want to claim for in the current period. Please refer to the FEEE calendar for the number of term time or stretched weeks.

The Present during Census box will automatically be populated as you are requesting a claim for the child. Please do not remove this tick.

If the child attends two days or more at your setting per week, you should tick the Attends Two Days or more box. If the box is not ticked, you will not be able to claim more than 10 hours a week for that child. Please note that as per the national guidance, no more than 10 hours can be claimed in one day. By not ticking the box the system will assume that the child is attending for 1 day and no more than 10 hours per week.

Next you will be required to input the number of Universal Funded Hours Per Week the child attends as stated on the PSOU.

The Attendance Days boxes are not mandatory and do not need to be completed if you do not want to.

The Non-Funded Hours per Week box is for any additional hours that the child is attending and not claiming funding for. If the child does not attend any additional hours, as this is a mandatory box, you will need to add 0.

The red box at the bottom of the tab will show you the maximum hours that a child can claim in that period and year, depending on if they are attending for one, or two or more days per week.

At this point, if you do not have any documents or notes that you would like to submit with the child's claim, you can click on Save at the bottom, and submit claim by clicking on Send Claim if all children have been added.

## Documents tab

You can upload any supporting documents by clicking onto the 'Upload a file' button in the Documents tab. Please ensure that you enter the description to clarify what the file contains. This could include:

- Birth Certificates if requested.
- 2 Year funding codes (confirmation emails) approved by other local authorities e.g. Leicester City.
- Copies of PSOU's, if requested if there is a dispute between providers.

Organisation: Little Playgroup  
Provider: Little Playgroup (Pre-School Playgroup)

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Peter Suggs DOB: 06-Jun-2020

Summary Child Details Parent/Carer Details Funding Details Documents Notes

Supporting Documents  
Please upload any documents which support this term.  
Please enter a Description to clarify what the file contains.  
Allowed file types are: All file types permitted  
Files may not be larger than 100 MB.

Description*	File Name
No Documents Uploaded	

Upload a file

Save Cancel \*denotes mandatory fields

## Notes Tab

In the Notes tab, you will be able to add any additional information relating to the child's claim. There is a box on the left-hand side of the screen to add new notes and this is a free type box. Historical notes will be shown on the right-hand side.

Organisation: Little Playgroup  
Provider: Little Playgroup (Pre-School Playgroup)

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Peter Suggs DOB: 06-Jun-2020

Summary Child Details Parent / Carer Details Funding Details Documents Notes

Add a new note

Notes History

No Historical Notes

Save Cancel \*denotes mandatory fields

## Saving the Individual Child Entry

Once you are happy with your claim, click on Save. If the claim does not save, a red banner will appear at the top of the page and a message will be shown in red near the Save button, giving you the reasons why it has failed – see the screenshot below:

You will need to repeat the above process for every child you wish to claim funding for.

Please note that if you navigate away from the page before saving, any changes will be lost.

Once all children have been added, you can submit your claim by clicking on Send Claim.

Save Record Failed Due To The Errors Listed Below

Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

**Child Details**

Forename\* [ ] \*

Middle Name [ ]

Surname\* [ ] \*

DOB\* [ ] \*

Proof of DOB

Gender\*  Male  Female \*

Preferred Surname [ ]

Ethnicity\* <unknown> \*

SEN COP Stage No Special Educational Need

**Search for an Address**

Primary [ ]

Postcode\* [ ]

Search

**Address**

Address Line 1\* [ ] \*

Address Line 2 [ ]

Address Line 3 [ ]

Locality [ ]

Town [ ]

County [ ]

Postcode\* [ ] \*

The following errors need to be fixed before the record can be saved:

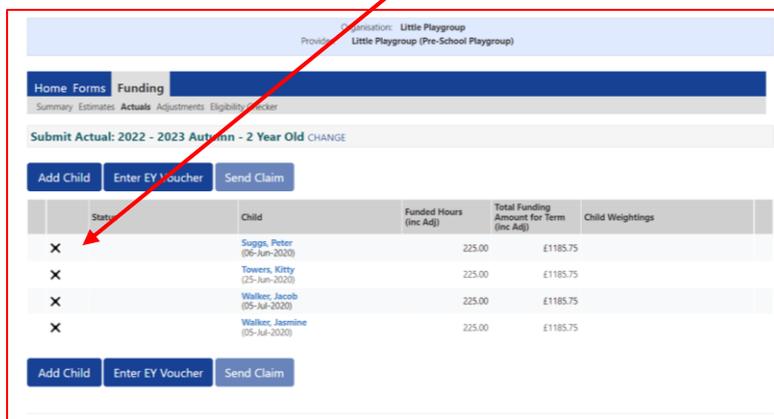
- Forename must be entered (Child Details Tab)
- Surname must be entered (Child Details Tab)
- DOB must be entered (Child Details Tab)
- Gender must be entered (Child Details Tab)
- Ethnicity Value cannot be '<unknown>' (Child Details Tab)
- Address Line 1 must be entered (Child Details Tab)
- Postcode must be entered (Child Details Tab)
- Term Start Date must be entered (Funding Details Tab)
- Term End Date must be entered (Funding Details Tab)
- Nominated for DAF must be entered (Funding Details Tab)

Save Cancel \*denotes mandatory fields

If you have made any changes but not submitted the form, a red exclamation will appear next to the children informing you that there is unsubmitted data. To rectify this, you can click on Send Claim.

## How to Delete a Child

If there is a child on your headcount that you no longer wish to claim for in the current period, you should press the X that appears on the left-hand side of the child.



Organisation: Little Playgroup  
Provider: Little Playgroup (Pre-School Playgroup)

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Voucher

Submit Actual: 2022 - 2023 Autumn - 2 Year Old CHANGE

Add Child Enter EY Voucher Send Claim

Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
X	Suggs, Peter (05-Jun-2020)	225.00	£1185.75	
X	Towers, Kitty (25-Jun-2020)	225.00	£1185.75	
X	Walker, Jacob (05-Jul-2020)	225.00	£1185.75	
X	Walker, Jasmine (05-Jul-2020)	225.00	£1185.75	

Add Child Enter EY Voucher Send Claim

Following this, you will receive the message below. If you are sure that you no longer want to claim for the child in this period, you will need to press Yes. If you pressed the X by mistake, press No.

### Request Delete

Are you sure you want to request the deletion of child: \_\_\_\_\_ from this headcount record?  
Delete requests are automatically submitted but can be cancelled.

Yes No