Establishment Portal

User Guide: Submitting a headcount

This guide explains:

A) How headcounts are generated and funding is claimed
B) How to submit a headcount
C) How to review the submission

Introduction

The headcount is the child level funding claim for the term and an audit of the funding at your setting. You must ensure the information is accurate and the headcount is submitted on time. You will be unable to submit the headcount and claim funding after the deadline date.

A) How headcounts are generated and funding is claimed

The headcount is generated by taking a snapshot of your live register. If the information on the register is up to date before you start to submit, your funding claim will be accurate. **It is advisable that you submit your headcount as soon as possible when the system opens to allow enough time to check your submission and avoid any issues**

Reminder! You do not need to add funded 2 year olds to your Live Register. This will be done for you as part of the eligibility check completed by The Early Years Service.

Before you submit the headcount you will need to have:
•Updated your Live Register to include all children you require funding for in the term.
•Updated records for any eligible 2 year olds that have been added to your register. You must update the number of funded weekly hours and the child's address. This information is not added for security.
Your headcount will not be processed if a child's address details are missing.
•Checked that all children you require funding for have the correct weekly hours on their record.
•Removed all children from your live register who you do not require funding for.
•Checked that all children you need to claim Extended Hours for have a valid 30 hours code **and the correct number of hours recorded in the 'extended hours' field.**
•Confirmed any children applying for Disability Access Funding.
•Completed an Early Years Pupil Premium Check for all children.

A guide to using the live register is available on our website:
www.trafford.gov.uk/eyportal

Calculation of funding: The Portal calculates total number of funded hours due per child the number of funded weeks available (based on their start date recorded on the register), multiplied by the number of funded hours per week. Providers receive funding for the full term, dependant on the child's start date.

The headcount allows for the number of weeks to be altered at child level. Providers are advised to use the 'claim maximum weeks' button on the headcount form in order to receive the maximum number of hours available for the term for each child.

Any changes made to the number of weeks claimed will be automatically approved when the headcount is processed.

Reminder! Funding for the term is allocated to the provider a child is attending on headcount day. Mid term transfers of funding are not permitted and there are no other opportunities for a child to access any unclaimed hours on your headcount at another provision.

Funding must be claimed in accordance with the defined term dates which are set in the system. Funding can be claimed on a termly or all year round basis. You can choose to the deliver the hours how you want over the term, in line with the Statutory Guidance. **The maximum hours per week available are:**

	Hours per Week	Weeks per year	Total Hours
Term Time	15	38	570
All Year Round	12	47.5	570

	Term Time Weeks	All Year Round Weeks	Maximum Term Time Hours	Maximum All Year Round Hours
Autumn	14	16	210	192
Spring	12	12	180	144
Summer	12	19.5	180	234

This ensures the maximum number of hours can be claimed for each child.

B) How to submit a headcount

1) Log into The Portal. Review your live register to ensure the funding details are correct. Make any changes to the register **before** you start to submit the headcount.

2) Click on the Early Years Tab at the top of the page and select 'Submissions.' You will then see the Submissions Wizard and can start to submit the headcount.

3) Click 'Next' to move through the stages. If it is time for a census the wizard will guide you through this.
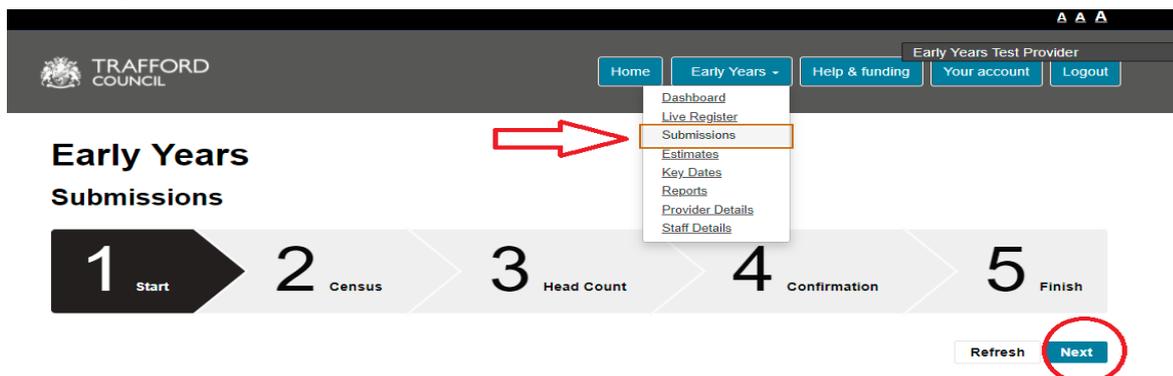
4) When you come to the Headcount section, scroll down to view the headcount generated based on your live register. You will see the hours you are claiming for each child as well as any additional EYPP or DAF funding.
**Important!** Review the information on screen to ensure it is correct.

You can change any incorrect hours at this point. Click the 'Reset' button if you make any mistakes, this will take you back to the start of the submissions wizard.

At this point you should also upload any relevant documents for each child. For example: a copy of a child's DLA awards letter if you are claiming Disability Access Fund for them.

5) Complete the 'weeks' field. You will not be able to proceed if this is not completed.
 To do this click the 'claim maximum weeks' at the top of the page.
You can edit the number of weeks on a child by child basis if you do not require the maximum number of weeks available for specific children.
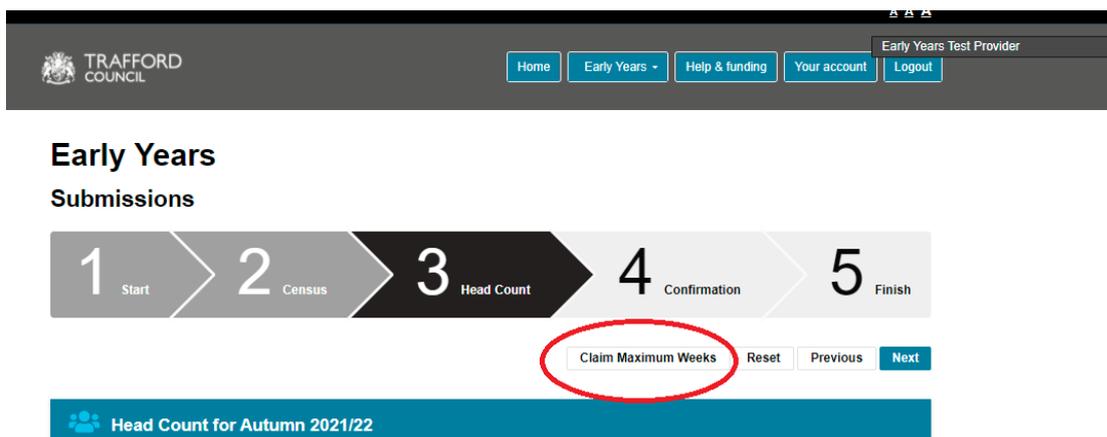
6) When the information on the headcount is correct, click 'Next' and you will come to the confirmation page. This page allows for a high level review of the information you are submitting and is the final chance to check for any errors.
**Reminder!** If there is any incorrect information do not submit the headcount.

Important! If there are any errors reset the headcount, ammend the live register and begin the submission again. Click 'previous' to go back to the headcount page or 'reset' to reset the whole headcount.
7) Click 'Submit' to submit the headcount form. You will see a message to confirm your headcount has been submitted.
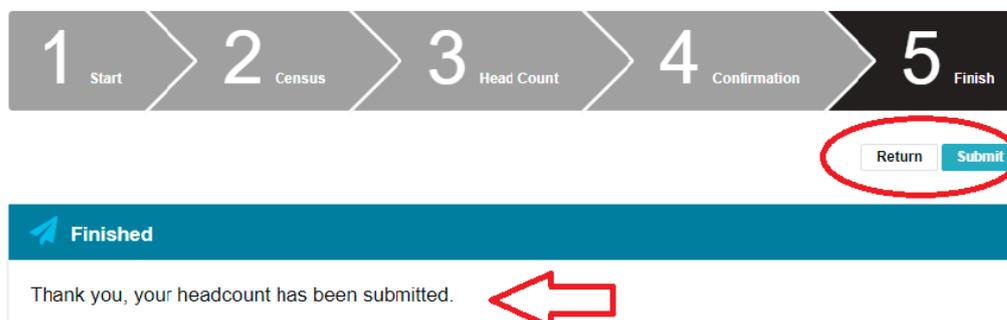
8) Check your submisison. See section C below for details of how to do this.

C) How to review the submission
You should review the information as soon as it has been submitted.

The submitted headcount can be checked by viewing the information on the submissions page **or** extracting a report of the submission. You can do this at any time, the information is always available.

1) View submissions:
• Click on the Early Years Tab at the top of the page and select 'Submissions.' You will come to the 'submissions' page.
• Scroll down to the 'previous headcount submissions' section. Here you can see all your previous submissions.
• In the list view of all submissions you will see a top level view of the total weekly hours as well as the submission date and who submitted the form.
• Drill down on the headcount form by clicking the arrow next to the term name. This expands the screen and you will see a full view of the headcount you have just submitted. You can see the total number of hours per week and for the term that you have claimed as well as any EYPP or DAF claims.

In this view you can also see how many hours have been approved. This will show as 0 when you have just submitted. Check back here when your headcount has been approved. If there are any discrepancies the Early Education Team will contact you.

	Term	Submission Type	Total Universal Hrs Claimed	Total Universal Hrs Approved	Total Extended Hrs Claimed	Total Extended Hrs Approved	Total Additional Hrs	EYPP Count	Submitted	
⌄	Autumn 2021/22	Head Count	35.0	35.0	0.0	0.0	0.0	0	24-Sep-2021	

2) Extract a report:
• Click on the Early Years Tab at the top of the page and select 'Reports.' You will come to the 'reports' page.
• There are a number of different reports available. To review your headcount, scroll down to the 'get a report of all entries from the selected submission' section.
• Click the drop down box and select the submission you require (the most recent headcount you have submitted).
• Click the download submissions button and the report will download in spreadsheet
• The report shows what information you have submitted, you can see the total number of hours per week and for the term that you have claimed as well as any EYPP or DAF

Get a report of all entries from the selected Submission.

Head Counts: Autumn 2021/22

⬇ Submissions

Important! Check the information you have submitted on your headcount is correct and that the total number of funded hours you have claimed is what you expect to receive for the term. If there are any monetary errors, for example: Extended hours have been missed off the claim or you have not claimed EYPP for a child, contact The Early Education Team immediately. It may be possible that your full headcount can be returned to you so that any errors can be corrected by the headcount submission deadline. All headcounts must be submitted by the termly deadline date, after then the system will close and there is no opportunity to make a funding claim for term.

Next Steps

When your headcount has been submitted it will be processed after the headcount deadline closes in time for the claim payment. If there are any queries on your headcount the Early Education Team will contact you. You can log into The Portal at any time to see the status of your headcount in the 'Submissions' section.

A timelime of important dates and an overview of the funding process can be found on our website:
www.trafford.gov.uk/earlyeducationproviders

Help & Support

User guides are available to help you with using The Portal including; checking 30 hours codes; using the live register and submitting your Headcount form. Follow the link below to view the guides:
www.trafford.gov.uk/eyportal

If you have any queries or would like to arrange some training please contact The Early Education Team by email so that the correct person can be assigned to support you.

Early.Education@trafford.gov.uk