

# Establishment Portal

## User Guide: Submitting the census and headcount



This guide explains:

- A) How headcounts are generated and funding is claimed
- B) How to submit the census and 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.

Every spring term each local authority is required to submit an Early Years Census to the Department for Education. This determines the level of early education funding we receive. The information required for the Census is taken from your spring term headcount submission on the Establishment Portal, there are no additional forms to complete, in spring there is an extra step in the Headcount process.

### 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. **You should 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 spring headcount you will need to have:

- Reviewed and updated the Staff Details section of The Portal, you will not be able to submit if this has not been completed.
- 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.
- Updated the ethnicity details for all children.
- 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 updating the staff details and using the live register is available on our website:**

[www.trafford.gov.uk/establishmentportal](http://www.trafford.gov.uk/establishmentportal)

**Calculation of funding:** The Portal calculates the total number of funded hours due per child based on the number of funded weeks available (which is determined by the child start date on the live register), multiplied by the number of funded hours per week. Providers receive funding for the full term, dependant on the child's start date. If a child is attending your setting on headcount day, you are entitled to claim the maximum termly weeks available. To do this the start date must be recorded as on or before the start of term

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 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.**

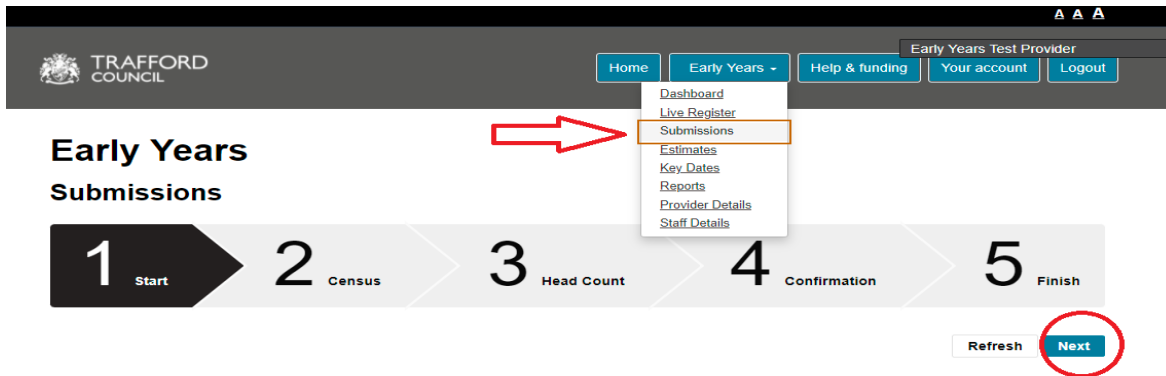
## **B) How to submit the census and headcount**

**Reminder!** Before starting to submit the headcount you must review and update the staff details section of the portal.

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

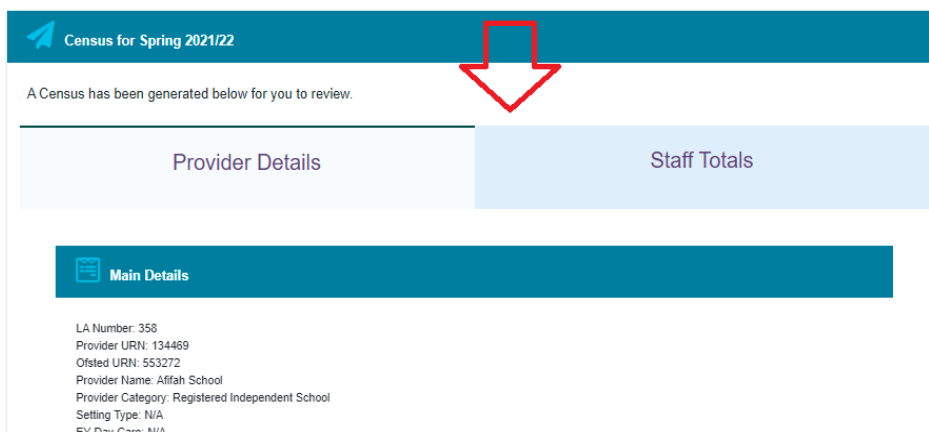
**2)** Click on the Early Years Tab at the top of the page and select 'Submissions.' You will then see the Submissions Wizard and can start to submit the headcount.

3) Click 'Next' to move through the stages.



4) Census Tab: You will come to the census tab first. There are 2 sections 'Provider Details' and 'Staff Totals.'

Click on the 'Staff Totals' section. Here you will see the information you have already updated.



Review the details. If any information is incorrect you will need to go to the main 'Staff Details' section, update, save and start the submission again.

**Reminder!** You must record at least one member of staff as a manager.

Click on the 'Provider Details' section. You will need to input the following information:

**Pupil Details:** Confirm the total number of privately funded (not accessing early education) children by age group.

**Opening Details:** Confirm the number of weeks your setting is open in a year and the daily opening times.

**5) When the information in the census tab is correct click next to move onto the headcount tab.**

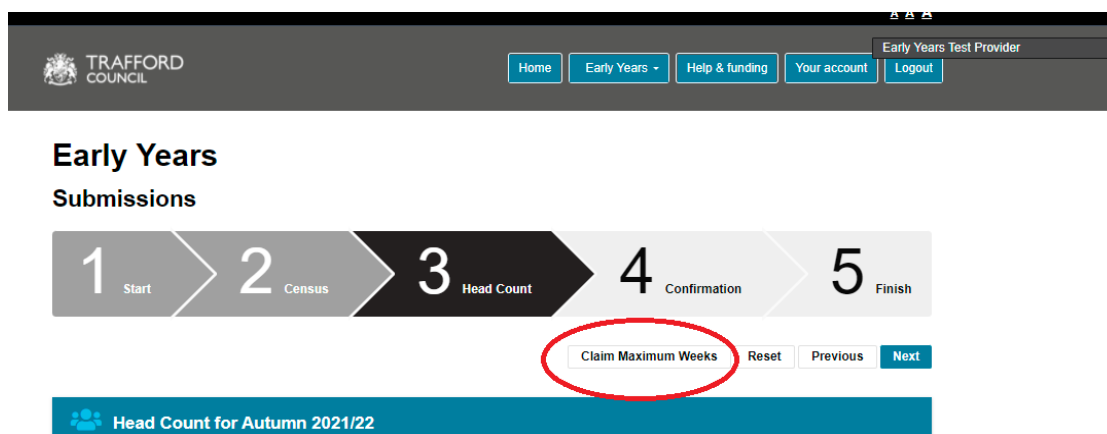
Scroll down to view the headcount generated based on your live register. You will see the hours you are claiming for each child as well as any additional EYPP or DAF funding. **Important!** Review the information on screen to ensure it is correct.

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.

**6) 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.



**7) 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.

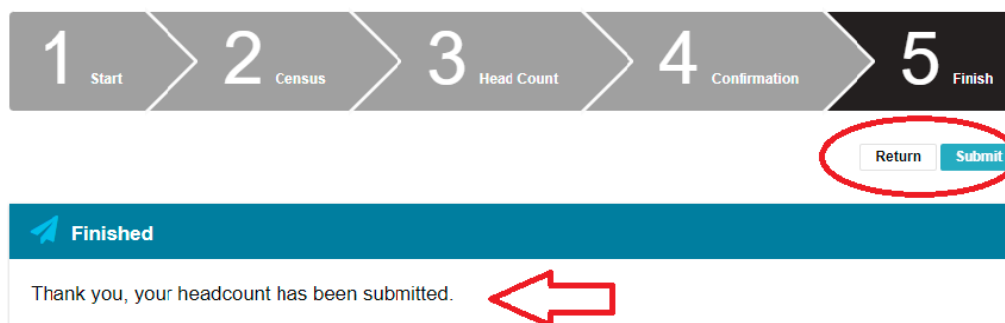
**Important!** If there are any errors reset the headcount, ammend the live register and begin the submission again. Click 'previous' to go back to the headcount page or 'reset' to reset the whole headcount.

**8) Click 'Submit' to submit the headcount form. You will see a message to confirm your headcount has been submitted.**

**9) Check your submisison.** See section C below for details of how to do this.

## Early Years

### Submissions



### 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.

Welcome to the Submissions Wizard.

A Headcount already exists for Autumn 2021/22



Previous Head Count Submissions									
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 timeline of important dates and an overview of the funding process can be found on our website:

[www.trafford.gov.uk/earlyeducationproviders](http://www.trafford.gov.uk/earlyeducationproviders)

## Help & Support

User guides are available to help you with using The Portal including; checking 30 hours [www.trafford.gov.uk/eyportal](http://www.trafford.gov.uk/eyportal)

If you have any queries or would like to arrange some training please contact The Early



[Early.Education@trafford.gov.uk](mailto:Early.Education@trafford.gov.uk)