

Provider Portal – Adding a new child to a headcount

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 click on “Select” from the
relevant row.

Home Forms Funding Images

Summary Estimates Actuals Adjustments Eligibility Checker

Summary Head Count Records for 2024/25 - EEF Autumn

2024/25

EEF Autumn

2023/24

2022/23

2021/22

2020/21

2019/20

2018/19

Funding Type

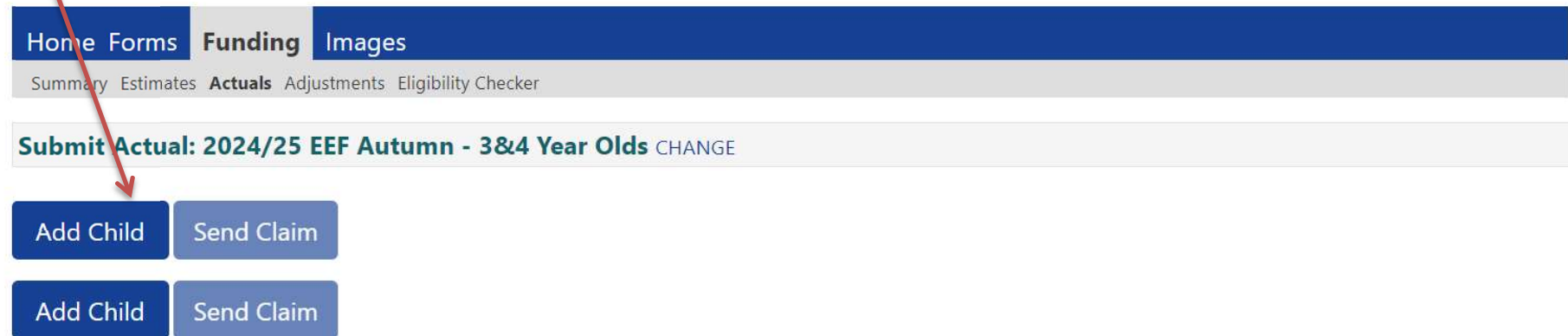
2 Year Olds

3&4 Year Olds

9 Month - 2 Year Old

STEP 3:

A child can be added to the headcount if their details are not currently showing. To start adding a new child click on the "Add Child" button.



The screenshot shows a web interface with a blue header bar containing the navigation menu: Home, Forms, Funding, and Images. Below this is a grey bar with the sub-menu: Summary, Estimates, Actuals, Adjustments, and Eligibility Checker. A light grey banner displays the text "Submit Actual: 2024/25 EEF Autumn - 3&4 Year Olds" followed by a "CHANGE" link. Below the banner are two rows of buttons. Each row contains a dark blue "Add Child" button and a light blue "Send Claim" button. A red arrow originates from the instruction box and points directly to the first "Add Child" button.

Home Forms **Funding** Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2024/25 EEF Autumn - 3&4 Year Olds [CHANGE](#)

Add Child Send Claim

Add Child Send Claim

STEP 4:

The first set of information to enter relates to the details of the child. Mandatory fields are shown in bold text and have an * at the end. It is a statutory requirement to check a child's date of birth before making a claim for funding. Please tick the "Proof of DOB" to confirm that you have seen the original birth certificate and a copy is held by the setting.

[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*

Address
Address Line 1*
Address Line 2
Address Line 3
Locality
Town
County
Postcode*

*denotes mandatory fields

STEP 5:

Click on the “Parent/Carer Details” tab to add the information required to complete an Early Years Pupil Premium (EYPP) check or to add an eligibility code. The parent date of birth is mandatory for an EYPP check.

You must obtain consent from the parent/carers. Failure to tick the consent box will result in no eligibility code check or EYPP check being carried out.

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

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child 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 to populate the “Term Start Date” and “Term End Date” fields.

Enter the number of weeks that the child is attending during the term. Further information on the number of weeks in a term can be found on the EEF webpages.

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 select this box and enter more than 10 hours you will get an error message to select this box.

Select Yes or No for the “Nominated for DAF” field (this is the Disability Access Fund). Please send relevant paperwork as per the DAF guidance on the EEF webpages.

If a child is going to stretch their funding please ensure the Stretching Entitlement box is checked.

STEP 8: If claiming Universal Hours please enter these hours in the Funded Hours per Week Hours.

If claiming Extended Hours enter a valid eligibility code and click “Check Eligibility Code” which should result in a green tick at the top of the page.

If you don’t get a green tick you will need to contact the Parent/Carer to check the eligibility code, parent NI number and child’s DOB.

Enter the extended hours in the “Extended Hours” box.

STEP 9: Enter “Non Funded Hours” in this box for any hours the family are paying for.

The screenshot shows the 'Funding Details' tab of a web form. At the top, there are navigation tabs: 'Home', 'Forms', 'Funding' (selected), and 'Images'. Below these are sub-tabs: 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main form area has sub-tabs: 'Child Details', 'Parent / Carer Details', 'Funding Details' (selected), and 'Documents'. The 'Funding Details' section includes fields for 'Start Date*', 'End Date*', and 'Weeks Attended in Term*'. A blue button labeled 'Default Term Dates' is positioned below these fields. Below the button are checkboxes for 'Present during Census', 'Attends Two Days or More', 'Nominated for DAF*' (with 'Yes' and 'No' radio buttons), and 'Stretching Entitlement'. The 'Funded Hours per Week' section has a 'Hours*' field and an 'Extended Funded Hours per Week' section with 'Extended Hours*' and 'Eligibility Code' fields. A blue button labeled 'Check Eligibility Code' is below the 'Eligibility Code' field. Below this is a checkbox for 'Eligible for Extended Hours' and a 'Total Funded Hours per Week' field. The 'Non-Funded Hours per Week' section has a 'Non-Funded Hours*' field. A red box at the bottom right contains 'Maximum Values Allowed' information. At the bottom left are 'Save' and 'Cancel' buttons. A footnote at the bottom center states '*denotes mandatory fields'. Red arrows point from the instructional text boxes to the 'Default Term Dates' button, the 'Present during Census' checkbox, the 'Check Eligibility Code' button, the 'Non-Funded Hours*' field, and the 'Maximum Values Allowed' box.

Funding Details

Start Date*

End Date*

Default Term Dates

Weeks Attended in Term*

Present during Census ☐

Attends Two Days or More ☐

Nominated for DAF* ☐ Yes ☐ No

Stretching Entitlement ☐

Funded Hours per Week

Hours*

Extended Funded Hours per Week

Extended Hours*

Eligibility Code

Check Eligibility Code

Eligible for Extended Hours ☐

Total Funded Hours per Week

Total Funded:

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*

Maximum Values Allowed:

Number of Weeks: **14.00**

Funded Weekly Hours: **10.00**

Funded Termly Hours: **140.00**

Funded Yearly Hours: **380.00**

Extended Weekly Hours: **10.00**

Extended Termly Hours: **140.00**

Extended Yearly Hours: **380.00**

Save **Cancel**

*denotes mandatory fields

STEP 10: If you intend to claim DAF for a child please click in Documents section and upload the child's current Disability Living Allowance award letter and current Parental Declaration Form to show that the Parent/Carer has nominated you for DAF.

You can skip this step if you don't intend to claim DAF for the child.

Home Forms **Funding** Images

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details **Documents**

Supporting Documents
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.
Allowed file types are: .png,.bmp,.doc,.docx,.jpg,.pdf,.rtf,.odt,.msg
Files may not be larger than 50 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

STEP 10: Click "Save". The child record will then show in the headcount list.

Save Cancel *denotes mandatory fields

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 "New, Awaiting LA Download". The status will disappear once the claim has been authorised by the FIS Team.