

# Online Provider Portal help guide

## How to claim child-level funding (Actuals) - Introduction

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### About this guide

This is the introductory part of a step-by-step guide for how to claim child-level funding (also known as Actuals) using the Online Provider Portal, which includes:

- Universal Early Years Funded Entitlement (EYFE) for 3 and 4 year olds
- Local Authority (LA) Issued 2 year old EYFE
- EYFE for Working Families, including for 9 months plus, 2 year olds and Extended EYFE for 3 and 4 year olds
- Early Years Pupil Premium (EYPP)
- Disability Access Fund (DAF)

Inclusion funding does not require you to claim on the portal

This guide will cover:

- How to access your claims
- How to remove child records for children you no longer wish to claim for

Visit the [EYFE actuals web page](#) for further guidance that covers the following:

- How to claim for new children
- How to claim for existing children
- Post-submission guidance (including dealing with rejected claims, viewing summaries, and common queries)

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## Note on internet browsers

It is recommended you use an up to date internet browser. If you experience technical difficulties, try updating or use an alternative browser, such as Google Chrome, Microsoft Edge, Mozilla Firefox etc.

## Before you start

### Have these things ready

- Hours per week for children that are continuing a funded place with you
- Details of new children you wish to claim for
- Parent/carer details including NI number for any new EYFE for Working Families, DAF or EYPP claims
- 11-digit eligibility codes for any new EYFE for Working Families children
- 6-digit LA Issued codes for any new 2 year old children awarded LA Issued 2 year old EYFE by WSCC
- Evidence issued by other Local Authorities for LA Issued 2 year old EYFE

### Things to note

- Children of eligible age are carried forward from your previous term's claim, but with zero funded hours - every child record requires you to act even if you do not wish to claim for them
- Ensure that you only claim for children attending during the week that the advertised headcount day falls in, or have an absence reason that is stipulated in the [Provider Declaration](#).
- You do not need to complete your whole claim in one portal session, your progress is saved automatically. Note that the portal signs you out after a few minutes of inactivity. If you are part way through adding a new child at the time, their data isn't saved and you'll need to start adding the child again on your next portal visit
- You **must** press the **Send Claim** button before the submissions deadline for us to receive your claim
- Temporary EYFE for Working Families eligibility codes are sometimes issued by HMRC. These may begin with '11' and may take 48 hours from time of issue to become available for eligibility checking – bear this in mind if you are unable to verify eligibility
- If you claimed last term, but don't have any funded children this term, you must remove the child[ren] from your claim and press the **Send Claim** button

### If you require assistance signing into the portal

- Find help [online](#)

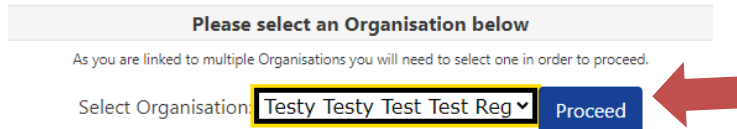
### If you require information about the differences between standard and stretched funding

- Find help on our [Providing EYFE](#) webpage.

## How to open your claim on the portal

1. [Sign in](#) to the portal.

If your account has access to more than one provider, choose the appropriate one (either day nursery, pre-school or childminder) from the list at the top of the screen after you have signed in.

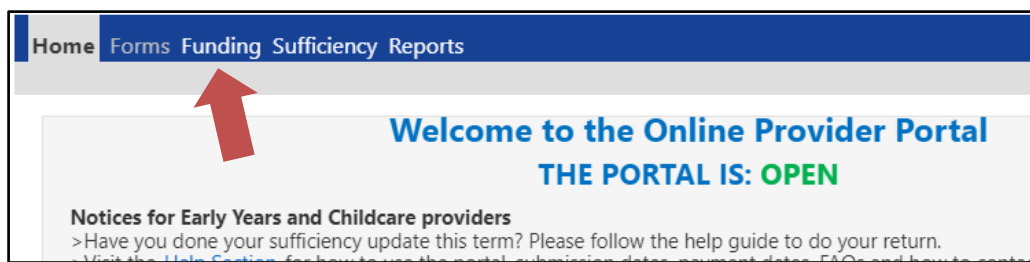


Please select an Organisation below

As you are linked to multiple Organisations you will need to select one in order to proceed.

Select Organisation: Testy Testy Test Test Reg ▼ Proceed

2. Choose **Funding** in the top menu.



Home Forms Funding Sufficiency Reports

Welcome to the Online Provider Portal

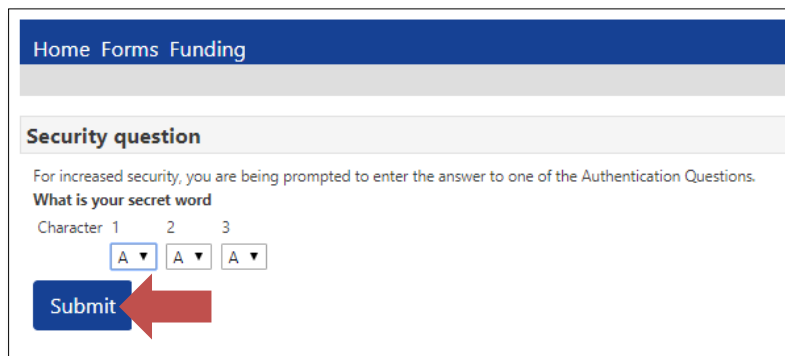
THE PORTAL IS: OPEN

Notices for Early Years and Childcare providers

>Have you done your sufficiency update this term? Please follow the help guide to do your return.

3. To access the **Funding** area of the portal, you must pass through a Security Question. Enter three characters from your secret word (note which three the portal is asking for) then press the **Submit** button.

If this is the first time accessing the Funding area of the portal, or you've had your account reset by us, your secret word will be defaulted to 'WSCC'.



Home Forms Funding

Security question

For increased security, you are being prompted to enter the answer to one of the Authentication Questions.

What is your secret word

Character 1 2 3

A ▼ A ▼ A ▼

Submit

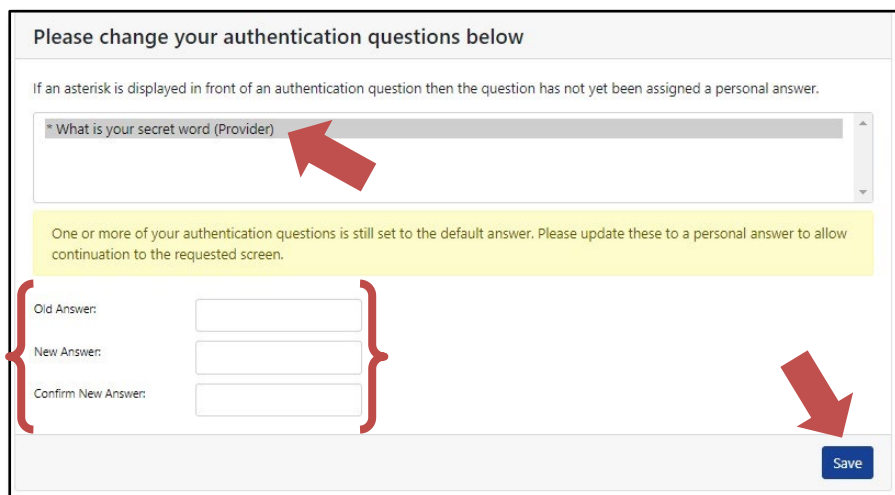
#### 4. This step is for users that have the default Secret Word (WSCC) only

If this is the first time accessing the **Funding** area of the portal, or you have had your secret word reset by us, you'll be prompted to change your default secret word to one of your own choosing.

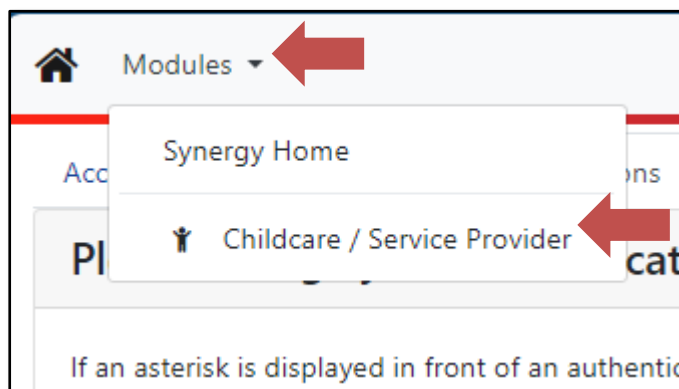
First, click on the text *What is your secret word (Provider)* so that it becomes highlighted (may take a moment to highlight if using a mobile or tablet device).

Then enter the old and new answer, into the boxes - the answers are case sensitive.

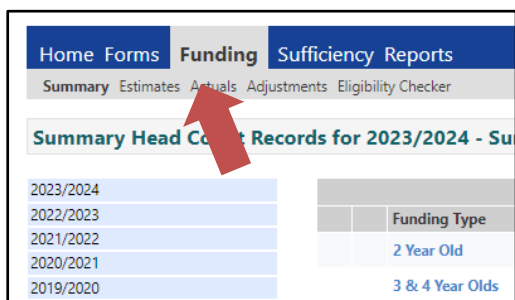
Press the **Save** button.



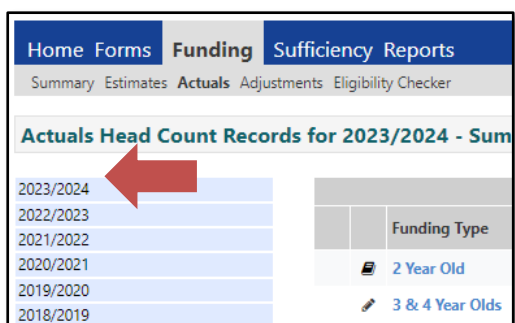
After changing your answer you'll need to click **Modules** at the top left of the window and click **Childcare/service provider** to return to the portal, and select **Funding** from the main menu again.




5. Choose **Actuals** from the **Funding** sub-menu.



6. You may need to click to expand the current year to see the terms within.



7. The green paper plane icon next to a term denotes that submissions are open - press it.

A red no-entry icon  denotes that submissions are not open at this time, check [here](#) for the next submission date. This page will also tell you about which forms are required to be submitted termly and which are as and when required.



- Claims for 9 months plus, 2 year olds and 3 & 4 year olds are all separate – remember to complete all that are applicable to you.

Select a **Funding type** to open your claim.

If this is the first time you have claimed EYFE for this provision, you can now proceed to our [help guide to adding children](#).

## Overview of the main claim screen

- The main claim screen is where all actions take place. It displays children that have been carried forward from last term's claim who are still age-eligible, and any children that you add this term.



### Buttons (appear top and bottom of the main claim screen)

- Add Child** – used to add a new child to the claim
- Send Claim** – used to send your claim to us. This button is only available to you when you make a change to at least one child on your claim. Pressing it only sends us the child records that have been changed since you last pressed the button
- Enter EY Voucher** – only appears on the 2 year old EYFE claim screen and is not used

### First column (warning symbols)

- An exclamation mark in a yellow triangle denotes the child was in their grace period for EYFE for Working Families at the time you last checked their eligibility from within their claim
- An exclamation mark in a red circle denotes that you have edited the child's claim but have not yet sent it to us, which will disappear when you send your claim. If you have sent it to us, this may appear for a new child awaiting LA Download, which you can confirm by viewing the **Status** column.

### Second column (delete and undo buttons)

-  A delete button with which you can remove a child from your claim.
-  An undo arrow is available next to a child's name if you are permitted to undo whatever action you have undertaken, for example to discard changes made to that child's claim

### Remaining columns (from left to right)

- **Status** – Tells you the status of a child's claim.
  - Blank – there are no changes to this child's claim waiting to be sent to us, this denotes that either you have not edited the claim, or we have processed changes previously sent to us
  - Unsubmitted Claim – you've edited the child's claim but not yet sent it to us
  - Awaiting LA Download – you've edited the child's claim and sent it to us
  - New, Unsubmitted Child – you've added a child but not yet sent it to us
  - New, Awaiting LA Download – you've added a child and sent it to us
  - Awaiting LA Deletion - you've deleted a child that was carried over from last term
- **Child** – name and DOB
- **Extended hours** - How many extended hours you are claiming for (only appears for 3 and 4 year olds)
- **Funded hours** – How many Universal EYFE (for 3 and 4 year olds) or LA Issued EYFE (for 2 year olds) hours you are claiming. Does not appear on 9 months plus.
- **Expanded hours** – How many EYFE for Working Families hours you are claiming (only appears for 9 Months Plus and 2 year olds)
- **Total funding amount for the term** - monetary calculation of expected funding for the child
- **Child weightings** – displays *EYPP + DEP* if the child has EYPP confirmed, otherwise blank
- **Eligibility status** – displays EYFE for Working Families eligibility code start date, end date, and grace period end date at the time you last checked their eligibility from within their claim




## Removing children from your claim

10. You must remove children from your claim if you are not claiming for them this term

This may be because:

- they have carried over from last term's claim but are no longer attending
- they have carried over from last term's claim but no hours are to be claimed this term
- you added them to your claim this term but subsequently need to remove them

Press delete **X** next to a child and agree to the prompt

Home Forms Courses <b>Funding</b> Sufficiency Staff							
Summary Estimates <b>Actuals</b> Adjustments Eligibility Checker							
Submit Actual: 2020/2021 Summer - 3 & 4 Year Olds 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	
<b>X</b>	Test, Stacey (04-Mar-2017)	0.00	0.00	£ 0.00			
 <b>X</b>	That, Katie (28-Mar-2017)	0.00	0.00	£ 0.00	EYPP + DEP	05-Jul-2018 - 22-Mar-2019 Grace Period: 31-Aug-2019	

When you press the delete button:

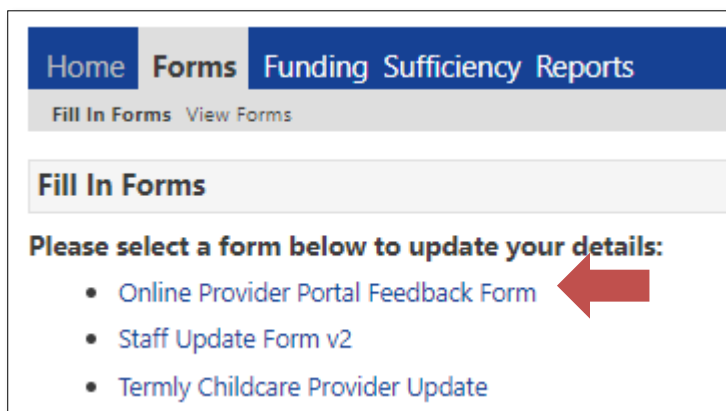
- children added this term will disappear from your list immediately
- children carried over from last term will not disappear immediately - their status will change to **Awaiting LA deletion** and we'll remove them from your claim after you send it to us later on

Now follow our help guides to [submit claims for existing children](#).

If you have no existing children to submit claims for, proceed to our guidance to [submit claims for new children](#).

## THIS IS THE END OF THIS GUIDANCE DOCUMENT

If you have any feedback for how this guidance could be improved, you can complete an Online Provider Portal Feedback Form found under Forms on the OPP.



Home Forms Funding Sufficiency Reports

Fill In Forms View Forms

**Fill In Forms**

**Please select a form below to update your details:**

- [Online Provider Portal Feedback Form](#)
- [Staff Update Form v2](#)
- [Termly Childcare Provider Update](#)