

## Establishment Portal – Submitting a mid-term joiner

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## Introduction

To support government priorities new children who are eligible for 2 year old funding can start their place in the second half of term, this is called a 2 Year Old Mid-Term Joiner. It is not available for children who have previously received funding and want to change providers. A claim must be made on The Establishment Portal by the termly deadline date to receive this funding.

There are 2 opportunities each term for a 2 year old to start a funded place: The start of term and after half term. If an eligible 2 year old joins your setting after headcount day they should not be included on your headcount submission. You can claim for them by completing a mid-term joiner submission on The Portal. The maximum you can claim is half a terms funding.

## How mid-term joiners are generated

A 2 Year Old Mid-Term Joiner can be generated 2 ways:

1. An eligible child is added to your live register with a start date *after* the termly headcount day
2. An eligible child is added to your live register with a start date before headcount day but after the termly headcount has been submitted

## How funding is calculated

The Portal calculates the maximum funding available for the term based on a child's start date, when the child is added to your register with a start date after headcount day, you will be asked if you want to claim for the child as a mid-term joiner and will be prompted to confirm how many weeks you require. The system will not allow the number of weeks to exceed what is available based on the child's start date but you can choose to claim less, this would be automatically approved when your submission is processed.

You should input the maximum number of weeks available as per the below table.

2 Year Old Mid-term Joiner Maximum Weeks & Hours				
	Term Time	All Year Round	Maximum Term Time Hours	Maximum All Year Round Hours
Autumn	7	8	105	96
Spring	6	6	90	72
Summer	6	9.75	90	117

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

**Funding for a full term will not be approved on a Mid-Term Joiner submission, the maximum funding available is half a term, as per the above table.**



# Before submitting

## Before submitting you will need to have:

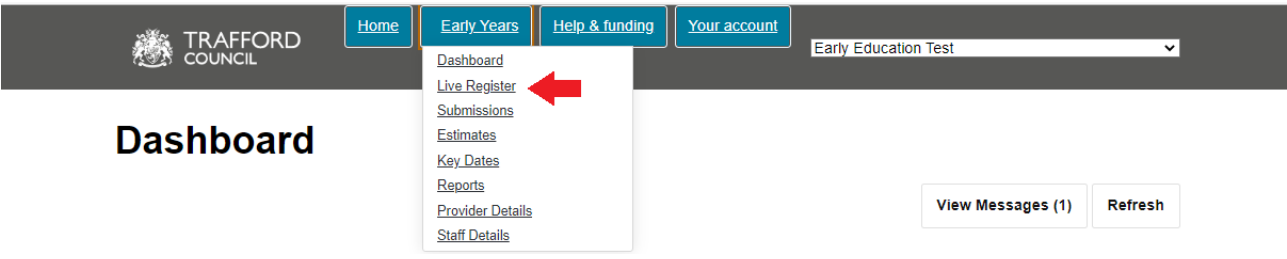
- Obtained all the required information for adding the child to the live register including the child’s 2 year old funding application reference number
- Established how many hours per week and total weeks you need to claim

A guide to adding children to the live register can be found on our website:

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

# Submitting the mid-term joiner

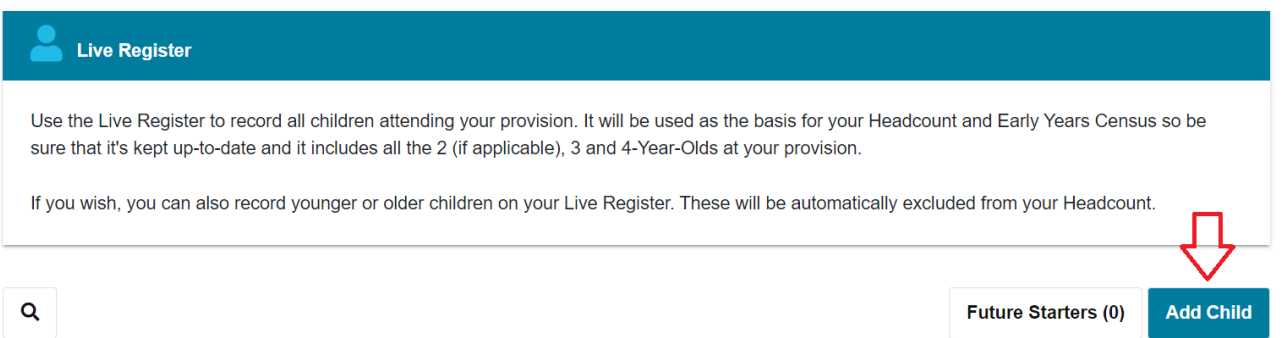
## Step 1: Log into The Portal and go to the Live Register



## Step 2: Add the child to the Live register

Add the child to the live register, following the usual process (guides are available on our website: [www.trafford.gov.uk/establishmentportal](http://www.trafford.gov.uk/establishmentportal) ).

Remember you will need to add in a valid 2 year old application reference to be able to claim funded hours.



### Step 3: Save the record

Click 'OK' to save the record.


#### Categories

Use this section to add tags / categories to this child which can then be used to filter on in the Live Register.

Add a category

**+ Add**

Categories No categories selected



**OK** Cancel

### Step 4: Confirm funded weeks

When you click 'OK' to save the record you will be prompted to confirm the number of weeks you require funding for. A form will pop up, this is called a 'Mid-Term Change.'


Input the number of weeks and click 'Confirm & Submit' to save. This generated a Mid-Term Joiner submission, which is sent to The Early Education Team for processing.

#### Process Mid Term Change

The child's Start Date and Funding details will be processed as a Mid Term Change.

Clicking 'Confirm & Submit' will process the Mid Term Change to the Local Authority.

If you are not expecting to process a Mid Term Change for this child, clicking 'Cancel' will allow you to review the child's 'Start Date' and/or 'Funding' details.

Funded Weeks \*  





**Confirm & Submit** Cancel



## Step 5: Check the Live Register

After clicking 'Confirm & Submit you will be reverted back to the live Register View.

The child should show on your register with a purple 2YO flag, which means they have funded hours recorded on their account.

Fred Test	M	01-Apr-2020	5	0.0	15.0	0.0	15.0	TTO				
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## Step 6: Check your submission

You must review the information as soon as it has been submitted to ensure it is correct, it may be possible for your submission to be returned so that you can rectify any errors. See below details how to do this.

## Check your submission

You should review the information as soon as it has been submitted. All previous claims 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 mid-term submission by clicking the arrow next to the term name. This expands the screen, you will see a full view of the headcount you have just submitted. You can see the total number of hours per week for the term that you have claimed.
- 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 several 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 claim you have submitted).
- Click download submissions button and the report will download in spreadsheet format.

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

**Check the information you have submitted 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 funding errors, for example: the hours per week are incorrect, contact The Early Education Team immediately. It may be possible that the claim can be returned to you so that any errors can be corrected by the submission deadline. All claims 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.**



## **After submission**

When your claim has been submitted it will be processed after the Mid-term joiner deadline closes in time for the reconciliation 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 on our [website](#) to help you with using The Establishment Portal including understanding 30 Hours Codes, submitting a headcount form and checking EYPP & DAF eligibility.

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](mailto:early.education@trafford.gov.uk)