

**Education Portal – Submitting a headcount form**

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## Introduction

This guide is for Early Education Providers submitting a headcount form on the Education Portal.

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. **You should submit your headcount as soon as possible when the system opens to allow enough time to check your submission and avoid any unforeseen delays.**

## How headcounts are generated

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. A guide to using the live register is available on our [website](#).

## How funding is calculated

There are a pre-set number of weeks and hours available for each term based on the type of claim made (All Year Round or Term Time), see below table for more information. The Portal calculates the total number of funded hours due per child based on their claim type and start date. Providers are entitled to claim the maximum termly weeks available funding for the full term for all children attending on headcount day. To receive funding for all weeks in the term, a child's start date must be recorded as on or before the start of term that term.

The headcount allows for the number of weeks to be altered at child level. Providers should use the 'claim maximum weeks' button on the headcount form to receive the maximum number of hours available for the term for each child. Any manual changes made by providers to the number of weeks claimed will be automatically approved when the headcount is processed.

## How funding is claimed

Funding for the term is allocated to the provider a child is attending on headcount day. Mid-term transfers of funding are not centrally administered 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 however best suits your business, 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.

## Before submitting the headcount

Before submitting the headcount you will need to have:

- ✓ Updated your Live Register to include all children you require funding for in the term, with the correct weekly hours.
- ✓ Updated ethnicity and address details for all children. Your headcount will not be processed if address details are missing. Ensure all children have an address on their record.
- ✓ Checked that all children you need to claim Working Parent Entitlement hours for have a valid eligibility code and the correct number of hours recorded in the 'Working Parent Entitlement' field.
- ✓ Confirmed any children applying for Disability Access Funding.
- ✓ Completed an Early Years Pupil Premium Check for all children.
- ✓ Removed all children from your live register who you do not require funding for.

## Step 1: Submit the headcount

### 1: Review live register

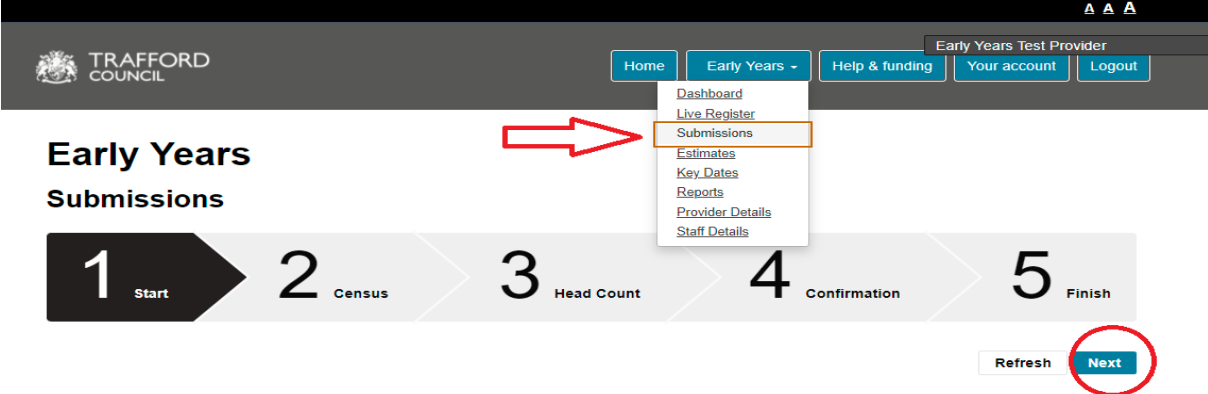
Review your live register to ensure the funding details are correct. Make any changes needed to the register before you start to submit the headcount.

The screenshot shows the Trafford Council dashboard interface. At the top, there is a navigation bar with the Trafford Council logo and several menu items: Home, Early Years, Help & funding, and Your account. A dropdown menu is open under 'Early Years', listing various options: Dashboard, Live Register (highlighted with a red arrow), Submissions, Estimates, Key Dates, Reports, Provider Details, and Staff Details. Below the navigation bar, the word 'Dashboard' is displayed in large text. To the right, there is a search bar containing 'Early Education Test' and two buttons: 'View Messages (1)' and 'Refresh'.



### 2: Submissions page

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: Follow submission stages

Click 'Next' to begin and move through the steps. If it is not time for census or your provision is a school, the census step will be skipped. You will start at the headcount step.

### 4: Headcount Form

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 funding. Review the information on screen to ensure it is correct.

3&4 Year Old Universal & 2 Year Old Disadvantaged Hours show in the 'Funded Hours Claimed' field. All Working Parent Entitlement Hours show in the 'Working Parent Hours' field. 'Additional Hours' are not funded and do not count towards your claimed for hours. Check to make sure you have the correct hours in each field.

**Submissions**

1 Start   2 Census   3 Headcount   4 Confirmation   5 Finish

Claim Maximum Weeks   Reset   Previous   Next

**Headcount for Summer 2023/24**

Child	Funding Age	Delivery Method	Weeks	Days Per Week	Additional Hours	Funded Hours Claimed	Working Parent Hours Claimed	Early Years Pupil Premium
David Beckham (01-Apr-2024 to 31-Aug-2024)	3YO	AYR	0.0	3.0	0.0	12.0	12.0	<input type="checkbox"/>

Add File (0)

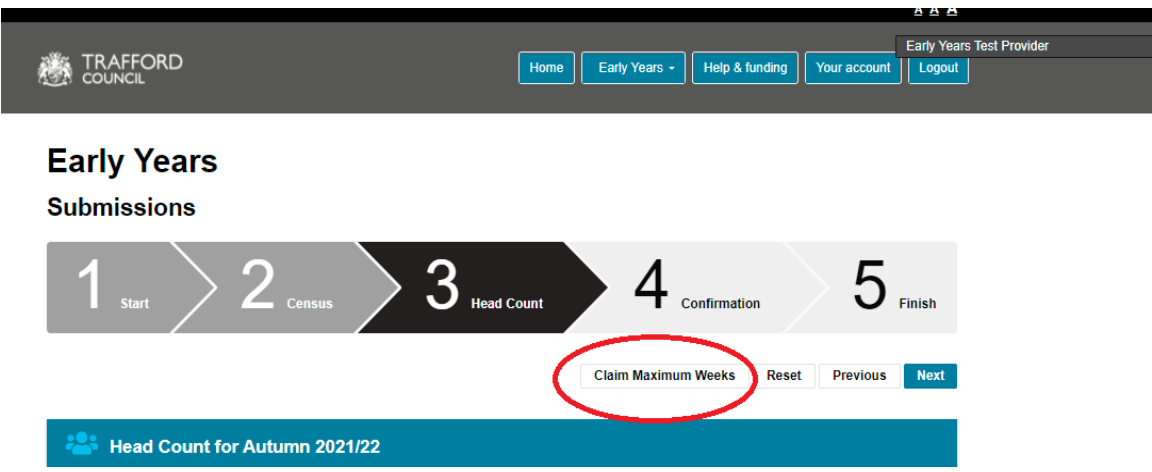


You can change any incorrect hours at this point. Click the 'Reset' button if you make any mistakes, this will take you back to the start of the submissions wizard.

At this point you can also upload any relevant documents for each child. For example: Care leaver evidence for EYPP.

**5: Confirm funded weeks**

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. You will not be able to proceed if this is not completed.



Click 'Next' when the headcount information is correct to move to the confirmation page.

**6: Confirmation**

This page asks you to confirm the headcount is correct and gives an overview of your claim. Check the headcount information is correct before agreeing to the confirmation.

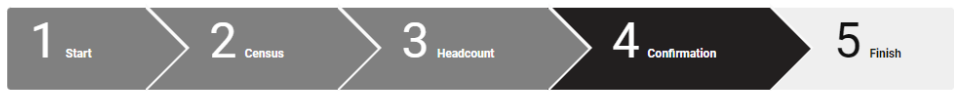
If there is any incorrect information do not submit the headcount. If you see an error, it is advisable to reset the headcount, amend the live register and begin the submission again. Click 'previous' to go back to the headcount page or 'reset' to reset the whole headcount.

When the information is correct tick the 'I Agree' confirmation box and click 'Submit' to submit the form. You will see a message to confirm your headcount has been submitted.



# Early Years

## Submissions



Reset Previous **Submit**

**Confirmation**

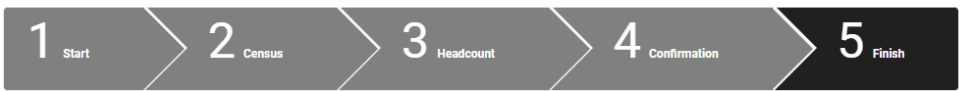
It looks like you're ready to submit your Headcount. Once you click **Submit** you will no longer be able to make any changes because it will be securely sent to the Early Years Team for approval.

By clicking **Submit** you are confirming that:  
The children on your Headcount were attending your setting during Summer 2023/24  
You have ensured the children on your Headcount during Summer 2023/24 are not claiming elsewhere  
Incorrectly claimed funded hours must be repaid  
Where parental information has been submitted, signed contracts are held by the setting giving the parent/guardian(s) consent for an Early Years Pupil Premium check to be completed

I Agree \* This field is required

# Early Years

## Submissions



Return **Submit**

**Finished**

Thank you, your headcount has been submitted.

### Step 2: Check your submission

You must review the information as soon as it has been submitted to ensure your claim is correct. Providers can have the headcount returned up to the termly final submission date which gives the chance to amend any errors. There are no further opportunities to make changes to the headcount after the submission date as the system is closed.

The 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.



Welcome to the Submissions Wizard.

A headcount already exists for Summer 2023/24

Previous Headcount Submissions

2024

Term	Submission Type	Total Universal Hrs Claimed	Total Universal Hrs Approved	Total Working Parent Hrs Claimed	Total Working Parent Hrs Approved	Total Additional Hrs	EYPP Count	Submitted	By	Status
Summer 2023/24	Headcount	80.0	0.0	42.0	0.0	18.0		23-Apr-2024	early.education@trafford.gov.uk	SUBMITTED

- Drill down on the headcount form 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 as well as any EYPP claims.
- In this view you can also see how many hours have been claimed / approved. When you have submitted the 'approved' hours will show as 0 and the 'outcome' will show as 'pending.' 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 Summer 2023/24

Headcounts: Summer 2023/24

Back

Child	DOB	From	To	Weeks	Total Hrs	Universal Hrs Claimed / (Approved)	Total Universal Hrs	Working Parent Hrs Claimed / (Approved)	Total Working Parent Hrs	Days/Week	EYPP	Outcome
David Beckham	31-Mar-2021	01-Apr-2024	31-Aug-2024	19.5	24.0	12.0 (0.0)	234.0	12.0 (0.0)	234.0	3.0	Not Applied	PENDING

**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 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.



Get a report of all entries from the selected Submission.

Summer 2023/24 (Headcount)

 Submissions 

**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: Working Parent Entitlement hours have been missed off the claim or you have not claimed EYPP for a child, contact The Early Education Team immediately so that your headcount can be returned to you and any errors 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 the term.**

**After submission**

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 on our [website](#) to help you with using The Education Portal including understanding eligibility 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)

