

**Education Portal – Submitting an Estimate**

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## Introduction

This guide is for Early Education Providers submitting an Estimate Form on the Education Portal.

The Estimate is not a child level funding claim it is an “estimate” of the number of funded children and weekly funded hours you will be delivering during the term so that the monthly Estimate Payments can be made.

[A termly Headcount Form](#) must be completed on [The Education Portal](#) to claim the funding for each individual child. If a Headcount is not submitted an invoice will be raised for the full amount paid in the Estimate Payments.

**The information you provide in the estimate will generate your Estimate Payments.** You must ensure the information is accurate and the Estimate Form is submitted on time. You will be unable to submit after the deadline date; you will not receive any monthly Estimate Payments if this form has not been submitted. **You should submit your estimate as soon as possible when the system opens to allow enough time to check your submission and avoid any unforeseen delays.**

The Early Education Team do not have any knowledge of the hours you will be delivering and will not query your submission. You must ensure the information you submit matches your own records of the funding you expect to deliver.

## How payments are calculated

Payments are made on a monthly basis. Your Estimate Payments will be calculated by taking into account the total number of hours per week you estimate that you will be delivering in the term. You will receive 100% of the total estimated amount, paid on a monthly basis. Please ensure you have completed the form accurately, to the best of your knowledge. More information about the funding and payments process can be found on our [website](#).

The Estimate is an approximation of the hours you expect to be delivering in the next term. The figures may change at your headcount submission which is the actual child level claim. This is expected and there is no issue with a difference between estimate and headcount submission.

## How estimates are generated

**The Estimate is generated by you** and the information you enter into the form on the portal which is then submitted to the Early Education Team for processing. The portal will automatically pull in information from your Live Register and Future Starter sections, which means you may see some information already pre-populated in the form for you.

**This should be checked and updated to match your own records and show the figures you want to submit.** The form is completely editable; you can over type and adjust every field on the estimate form to reflect your estimated hours.

**How funding is claimed**

When submitting the Estimate Form, you will need to confirm the number of weekly hours by age and delivery type. This means whether you are delivering funding on a term time or all year round basis.

Funding can be claimed on a termly or all year round basis.

The maximum hours per week available are:

| <b>2 Year Old Funding for Families Receiving Additional Support (FRAS); 3&amp;4 Year Old Universal Entitlement &amp; 3&amp;4 Year Old Working Parent Entitlement</b> |                |                |             |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----------------|-------------|
|                                                                                                                                                                      | Hours per Week | Weeks per year | Total Hours |
| Term Time                                                                                                                                                            | 15             | 38             | 570         |
| All Year Round                                                                                                                                                       | 12             | 47.5           | 570         |

| <b>Working Parent Entitlement for 2 Year Old and Under 2s</b> |                |                |             |
|---------------------------------------------------------------|----------------|----------------|-------------|
|                                                               | Hours per Week | Weeks per year | Total Hours |
| Term Time                                                     | 30             | 38             | 1140        |
| All Year Round                                                | 24             | 47.5           | 1140        |

|        | Term Time Weeks | All Year Round Weeks | Maximum Term Time Hours | Maximum All Year Round Hours |
|--------|-----------------|----------------------|-------------------------|------------------------------|
| Autumn | 14              | 16                   | 210 /420                | 192 /384                     |
| Spring | 12              | 12                   | 180 /360                | 144 /288                     |
| Summer | 12              | 19.5                 | 180 /360                | 234 /468                     |

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



## Before submitting the estimate

Before submitting the estimate, you will need to know the following information for each age cohort.

| Under 2                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 2 Year old (Working Parent Entitlement) | 2 Year Old (Disadvantaged) | 3 Year Old | 4 Year Old |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------------------------|------------|------------|
| <ul style="list-style-type: none"> <li>✓ Total children in a term time only place</li> <li>✓ Total children in an all year round place</li> <li>✓ Total weekly term time only hours</li> <li>✓ Total weekly all year round hours</li> </ul> <p><b>For 3&amp;4 year olds include Universal &amp; Working Parent Entitlement hours together. A child accessing 15 universal + 15 working parent entitlement hours would be accessing 30 hours per week</b></p> |                                         |                            |            |            |

**Example: The below submission shows an Estimate of 14 children and 345 weekly hours in total.**

| Cohort                                  | Delivery Method | Total Children | Weekly Hours |
|-----------------------------------------|-----------------|----------------|--------------|
| Under 2                                 | TTO             | 2              | 60           |
|                                         | AYR             | 1              | 24           |
| 2 Year old (Working Parent Entitlement) | TTO             | 1              | 30           |
|                                         | AYR             | 2              | 48           |
| 2 Year Old (Disadvantaged)              | TTO             | 1              | 15           |
|                                         | AYR             | 1              | 12           |
| 2 Year Old (Combined)                   | TTO             | 1              | 30           |
|                                         | AYR             | 0              | 0            |
| 3 Year Old                              | TTO             | 3              | 90           |
|                                         | AYR             | 1              | 12           |
| 4 Year Old                              | TTO             | 0              | 0            |
|                                         | AYR             | 1              | 24           |
| <b>Total</b>                            |                 | <b>14</b>      | <b>345</b>   |



## Submitting the estimate

### Step 1: Dashboard

Log into the portal and review the submissions dates on the Dashboard. If it is time for an Estimate submission this will show at the top of the page.

Estimates and Headcounts

The Headcount day for Summer term was 23-Apr-2024. Your submission is due by 14-Jul-2024.  
The Estimate day for Autumn term was 08-May-2024. Your submission is due by 31-Aug-2024.

|                         |                                       |                                        |
|-------------------------|---------------------------------------|----------------------------------------|
| Under 2's<br><b>0</b>   | Disadvantaged 2 year olds<br><b>0</b> | 2 year olds Working Parent<br><b>0</b> |
| 3 year olds<br><b>1</b> | 4 year olds<br><b>4</b>               | Total Children<br><b>5</b>             |

Requested / Receiving EYPP  
**1 / 1**

Requested / Receiving DAF  
**1 / 0**

Receiving Working Parent Entitlement  
**2**

Online Eligibility Checks

### Step 2: Estimates Page

Click on the Early Years Tab at the top of the page and select 'Estimates.' You will then see the Estimates Wizard and can start to submit the form.

Home
Early Years
Help & funding
Your account
Logout
Early Education Test TWO

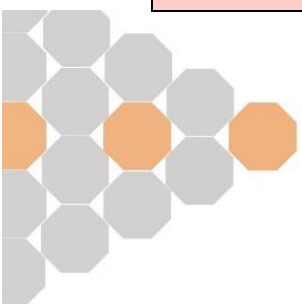
## Dashboard

- Dashboard
- Live Register
- Submissions
- Estimates
- Key Dates
- Reports
- Payments
- Provider Details
- Staff Details

### Step 3: Input information

The Estimate form is generated by you. You need to input information into the form.

Input the total number of children and total number of weekly hours for each age cohort by delivery type.



On the page you will see the Estimate Form. This is where you input the hours you intend to deliver. Click 'Next' to begin.

### Early Years

#### Estimates



The total weeks available for the term on a term time / all year round basis show at the top of the page. There is no need to adjust this information, but you can change the weeks if you want to claim **less weeks**, you cannot exceed the maximum weeks available. **Providers should claim the maximum weeks available, if open.**

The next section requires you to input information. This section may already be pre-populated with information from the Live Register or Future Starters Section, depending on the information already set up in those sections. **You can edit and overwrite these figures.**

**The information you input into this section should match the records for your setting and be completed to the best of your knowledge at this point of time.**

If you do not have any children in a cohort or delivery choice enter 0.

**Total Claimed Hours Autumn 2024/25**

Term Time Only Weeks:

All Year Round Weeks:

| Cohort                      | Delivery Method | Total Children                 | Weekly Total Hours               |
|-----------------------------|-----------------|--------------------------------|----------------------------------|
| Under 2                     | TTO             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
|                             | AYR             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
| 2 year old (Working Parent) | TTO             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
|                             | AYR             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
| 2 year old (Disadvantaged)  | TTO             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
|                             | AYR             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
| 3 year old                  | TTO             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
|                             | AYR             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
| 4 year old                  | TTO             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |
|                             | AYR             | <input type="text" value="0"/> | <input type="text" value="0.0"/> |

When you have entered all the required information, and this matches your records click 'next' to move to the next step. To view the previous screen, click 'previous.' To re-set the form and start again click 'reset.'

When you click 'next' The Portal validates the numbers in the form to check for any overclaims or anomalies.

If there are any errors, you will receive a red message in the top left hand corner of the screen. Errors must be resolved before you can proceed to the next screen.

**Estimates**

The estimated number of 'All Year Round' hours for 0 x 2 year olds (Working Parent) cannot be more than a total of 0.00 hours.

Claim Maximum Weeks   Reset   Previous   **Next**

**Step 4: Submit**

After clicking 'next' you will come to the 'Submission' page.

Tick the box in the 'confirmation' section to agree to the terms of the submission, you will not be able to submit if this box has not been ticked.

The section below is the 'Estimate Details Overview' and confirms the total number of children and the total number of weekly hours you are claiming by age cohort. Check this information is correct before you submit the Estimate.

**When you are happy click the blue 'Submit' button.**



### Estimates



Reset Previous **Submit**

**Confirmation**

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

By clicking **Submit** you are confirming that:

- the information on your Estimate is an accurate representation of the children who are due to attend your setting during Autumn 2024/25
- incorrectly claimed funded hours must be repaid

I Agree \* This field is required

**Estimate Details Overview Autumn 2024/25**

Please review the following claimed hours and estimate details.

**Total Children:** 20

**Term Time Only:** 14.0 weeks

- 5 x Under 2s are claiming 630.0 funded hours.
- 5 x 2 year olds (Working Parent) are claiming 630.0 funded hours.
- 5 x 3 year olds are claiming 630.0 funded hours.
- 5 x 4 year olds are claiming 1050.0 funded hours.

**All Year Round:** 16.0 weeks

That's a total of **2940.0** funded hours.

**Confirmation**

Ready to submit? Once you click "Submit" the data you reviewed in the 'Total Claimed Hours' section will be sent.

When the Estimate Form has been submitted you will see a 'finished' message, which confirms the form has been submitted.

## Early Years

### Estimates



Return **Next**

**Finished**

Thank you, your estimate has been submitted.



# Check your submission

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

The estimate can be checked by viewing the information on the 'Estimates' page or extracting a report of the submission. You can do this at any time, the information is always available.

## 1. View estimates

- Click on the Early Years Tab at the top of the page and select 'Estimates.' You will come to the 'estimates' page.
- Scroll down to the 'previous estimate 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 claimed by delivery type as well as the submission date and status of the submission. This will show as 'Pending' while it waits for approval and the 'total approved hours' will show as 0.

Welcome to the Total Claimed Hours Estimate Submission Wizard.

An Estimate already exists for Autumn 2024/25

Previous Estimate Submissions

2024

| Term           | Delivery | Total Claimed | Total Approved | Submitted   | Outcome |
|----------------|----------|---------------|----------------|-------------|---------|
| Autumn 2024/25 | TTO      | 210.0         | 0.0            | 10-Jul-2024 | PENDING |
|                | AYR      | 0.0           | 0.0            |             |         |

- Drill down on the estimate by clicking the term name. This expands the screen; you will see a full view of the estimate. You can see the total number of weekly hours and children by cohort and delivery type.

| Term           | Delivery | Total Claimed | Total Approved | Submitted   | Outcome |
|----------------|----------|---------------|----------------|-------------|---------|
| Autumn 2024/25 | TTO      | 210.0         | 0.0            | 10-Jul-2024 | PENDING |
|                | AYR      | 0.0           | 0.0            |             |         |

| Cohort                      | Delivery | Total Children | Weekly Total Hours |
|-----------------------------|----------|----------------|--------------------|
| Under 2                     | TTO      | 5              | 45.0 claimed       |
|                             | AYR      | 0              | 0.0 claimed        |
| 2 year old (Working Parent) | TTO      | 5              | 45.0 claimed       |
|                             | AYR      | 0              | 0.0 claimed        |
| 2 year old (Disadvantaged)  | TTO      | 0              | 0.0 claimed        |
|                             | AYR      | 0              | 0.0 claimed        |
| 3 year old                  | TTO      | 5              | 45.0 claimed       |
|                             | AYR      | 0              | 0.0 claimed        |
| 4 year old                  | TTO      | 5              | 75.0 claimed       |
|                             | AYR      | 0              | 0.0 claimed        |



## 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 estimate, scroll to the 'get a report of all estimates previously submitted' section.
- Click the 'download Estimates' button and the report will download in spreadsheet format.

The report shows a list of all estimates submitted and the total weekly hours and children by cohort and delivery type.

### Reports



**Important:** This information is used to generate your monthly Estimate Payments for the term. Check the information you have submitted on your estimate is correct and that the total number of funded hours you estimated is what you expect to deliver, to the best of your knowledge and matches your own record for your setting. The Early Education Team do not have any knowledge of the hours you will be delivering and will not query your submission. If there are any errors, contact The Early Education Team immediately so that your estimate can be returned to you and any errors corrected by the submission deadline.

All estimates must be submitted by the termly deadline date, after then the system will close and there is no opportunity to submit.

## After submission

When your estimate has been submitted it will be processed for payment. You can log into The Portal at any time to see the status of your estimate submission in the 'Estimates' section.

## 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)

