

# Funding system quick start guide

## Claims

Log in to the claims system

Go to FUNDING

For claims go to ACTUALS

Pick the correct funding period, if it is closed it will not allow you to make changes to the claim

Pick the correct claim 9 month old, 2yo or 3&4yo, you need to submit each claim separately.

**To add a child**, go to ADD CHILD

Fill in all the tabs.

For 2 year olds you will need to pick the right claim, either Disadvantaged or Expanded/Working parent claim.

If you are making a 2 year old Disadvantaged claim, do not put the voucher code in the funding tab as it will not work on the system, instead upload the North Somerset voucher letter to the documents section.

For working parent claims you will need to enter the working parent code.

Press the Check Eligibility Code button on the funding tab to refresh the feed with HMRC to check the code is in date and ok to use.

Please see the Funding FAQs if you get error messages.

On the funding tab there is now a new census information section. Please enter your full-time number of weeks, for instance 38 weeks for term time, or 47.5 weeks for stretched.

You will need to upload the parent declaration form and child's birth certificate or passport.

**To update a child**, click on the child's name and overwrite the information on the tabs if required. Press the blue Check Eligibility Code button to refresh the feed from HMRC to see if the parent has updated the code. Check the hours you need to claim are correct.

**On each claim** you will need to check all the details and fill in the weekly hours.

Remember every new child needs their birth certificate, and a parent declaration form uploaded to their claim, Disadvantaged 2 year olds also need their 2 year old voucher letter to be uploaded.

Every current child needs a current parent declaration form uploaded to each claim on the documents tab. NOT means not attached, ATTACHED means attached. Press SAVE.

Claims will be refused without these.

Remember to press SAVE and SEND CLAIM. By pressing Send Claim, it sends all changes across to us.

The **SEND CLAIM** button will change from dark blue to light blue if you have sent all changes to us. If in doubt, press it.

To delete a child, press the X next to the child's name.

To undo / edit the child's claim/adjustment, please press the undo/edit button which is the circular arrow next to the child's name. This resets their claim, so you will need to input it again.

You can add children or amend your claim any time up to the deadline, even after you press Send Claim. Remember to press Send Claim every time you want to send your updated claim to us.

## **Adjustments**

Log in to the claims system

Go to FUNDING

For adjustments go to adjustments

Pick the correct funding period. If it is closed it won't let you make changes.

Pick the correct age range.

**To add a child**, press ADD CHILD.

Fill in all the tabs.

The adjustment works on hours rather than weeks. Due to this the hours per week, and number of weeks will be greyed out on the funding tab as you don't need to fill them in. Instead put the overall hours you need to claim into the adjustment tab, for instance 100 hours. Remember to give a full reason so an auditor knows why you are requesting hours, we can reject your claim if your reason is vague. Remember to upload the supporting documents (parent declaration/child's birth certificate/disadvantaged 2 year old letter).

**To update a child**, it will show you what hours overall you have claimed, work out what the difference is, go to the adjustment tab, and claim the extra hours / reduce down the hours. Upload the new parent declaration form if the hours have changed.

**Example**, if you wanted to claim 10 more hours, click More and input 10 then put the reason why you have made the adjustment – for instance “we were open on X date which is outside of the normal funding dates, we are open 50 weeks per year”

Remember if the child increased hours mid funding period, please upload the new parent declaration form to the documents tab.

If you wanted to reduce your claim by 10 hours, click LESS and input 10 then put the reason.

Press **SAVE**

Then **SEND CLAIM**. By pressing Send Claim you send all changes across to us.

You can add children and make/amend adjustments up to the deadline, even after you press Send Claim. Remember to press Send Claim every time you want to send your updated adjustments to us.

## Claim rejections

Individual claims can be rejected, if this happens, the system will send an automated email to your registered email address, however many email providers will mark this as spam, so we recommend you check your Home screen on the funding system at regular intervals as rejections will show there.

You will then be able to check it on the funding system by going to the home screen, it will state if you have unsubmitted / rejected children. Click on this and it will take you to the correct claim. The child will have Rejected next to their name. Click into the child's name, then go to the Summary tab within the child record. There will be a box containing the details of why the claim was rejected. You can then amend and send the claim. This has to be done before the claim deadline. You may need to press the undo edit (curvy arrow) next to the child's name to reset the adjustment so you can change it.

## Notes

Please ignore the Summary screen or references to Paid claims/adjustments, we do not pay directly from the funding system, so it often does not tally until the full period has been processed.

Please instead use the monthly payment breakdown on [www.n-somerset.gov.uk/eyfunding](http://www.n-somerset.gov.uk/eyfunding) where there are also helpful FAQs, and the funding system claim dates.

EYPP is checked by the system after the claim closes and updated within two weeks.

You can use the standalone eligibility checker on the system if a parent brings you a Working Parent code. Remember for a code to be in date it must have a start date BEFORE the funding period, and an end date that is after the start of the funding period.

For example, the Summer funding period is 1<sup>st</sup> April – 31<sup>st</sup> August, so the code should have a date of on or before 31<sup>st</sup> March, and end after 1<sup>st</sup> April.

If the parent comes to you mid-funding period with a new code, it is likely that it will be “valid”, but the dates mean you cannot use it for that funding period. They may need to revalidate the code with HMRC before they can use it for the next funding period.

If the code does not work, it may be that your data input is incorrect, so check the child date of birth, parent NI Number and Working Parent code. The NI number needs to belong to the parent that applied for the code. We cannot help parents with codes as they are issued by HMRC not North Somerset Council.

### **Claim status**

- Blank = Any changes have been processed / No changes have been made to your claim.
- Awaiting LA Download = Claim has been submitted but has not yet been processed
- Rejected = Rejected and needs to be amended before the deadline
- Unsubmitted = The send claim button has not yet been pressed, so the claim has not yet been sent to us. You need to press the Send Claim button before the deadline.

If you have any queries please first check the Funding FAQs, then if you still need help, email [EY.Funding@n-somerset.gov.uk](mailto:EY.Funding@n-somerset.gov.uk)