This document gives instructions on how to make your claim using the Task in the Provider Portal. To make your claim, you must be logged into the Provider Portal. Please read the EY Portal user guide first if you have not used the portal before. It will show you how to navigate the system. This guide assumes that knowledge.

SECTION 1 – GO TO YOUR TASK

When in the Portal, select the Headcount tile to go to your Task.

The Task will have a deadline date. You must submit by this date otherwise you will lose the information you have input and will need to start again once a new Task is issued.

SECTION 2 – EYPP CARER INFORMATION PROMPTS
When you open your Task, if you have previous children listed, you should see that the edit buttons alongside the child rows of 3 and 4 year olds are blue. This means that carer information has been added previously or that ‘decline to provide’ was selected previously. If the edit button is red, this is your prompt to add the details. If red edit buttons show, you must take action or you will not be able to submit your Task.

A blue box means *either* the child is a two year old and not yet eligible for EYPP *or* information was provided previously *or* ‘declined to provide’ has been selected.

You will see that alongside the child rows, there are red or blue edit boxes.

Red boxes **must** be edited.

A red edit box is a prompt to add carer details and relates to EYPP.

If you hover over the red button, a message appears:

You must select the edit button and add the carer details. You will not be able to submit the claim until you do so.

For further instructions on how to add the carer information, see the separate guide *EY Portal how to add EYPP info* which can be found on the Childcare and Early Learning webpage.

For children that you are not claiming, if the edit button is red, you will need to select ‘Decline to provide’. Unfortunately, the system has been created to ensure that either ‘Yes’ or ‘Decline to provide’ is selected for all children whether or not you are making a claim. Selecting ‘Decline to provide’ in this case means that the system will not check the carer details against your setting as you have no claim.

**SECTION 3 – HAVE YOU VALIDATED THE ELIGIBILITY CODES?**

For information on how to run an eligibility check, please see the guide *How to make an eligibility check*.

When a validation has been made, an **EH** will show in the ‘Funding’ column. Once the code has been validated, you will be able to enter the Extended claim for that child. If you see green zeros, this means that you can enter data.

Blank cells mean that you cannot enter data.

**SECTION 4 – ADDING or REMOVING CHILDREN**

The Task claim form may contain existing children if children claimed last term are still eligible, or the form may be blank. You will need to **add** children who are not already showing. It is best to add all of the new children first and then go back and add the hours and weeks.

Select ‘Add Child’
Complete the relevant fields with the child’s Legal Forename and Surname and select **Next** as you complete all of the details.

**Add Child**

- **Forename**: Teresa
- **Surname**: Mindley
- **Gender**: Female
- **Date of birth (dd/mm/yyyy)**: 
- **Postcode**: 
  - **Find Address**
  - **I don't have a Postcode**
  - **Required field**

To find the home address please enter the postcode and click 'Find Address'. If the address is not postcode, you can look it up [here](#).

*Cambridgeshire is not collecting the First Language information although the set up of the Portal requires that something is entered into the field.*

When selecting the First Language field, you may type ‘**not**’ or ‘**Info**’ in the field and it should bring up ‘Information not obtained (NOT).’

Select .

If you have the postcode, enter it and select **Find Address**. If the correct Address is returned highlight it in the list and **Select**.

Then select **Submit**.

**Note!** If no suitable Addresses are returned select **Enter Address Manually** and type the new address in.
Start and end dates

If the child starts at the beginning of the funding period and the Start Date shows this or an earlier date then you don’t need to do anything.

If the child starts after the beginning of the claim period, for example, they will start 3 weeks into the period on 22 January, then you would enter a ‘Start Date’ of 22/01/2017. If another provider is claiming 3 weeks for that child, they would leave the start date shown in the portal but would ADD an ‘End Date’ of 19/01/2017. Without the start and end date, the system sees an overlapping claim and will think too many hours are being claimed. This claim would look like this.

<table>
<thead>
<tr>
<th>Provider</th>
<th>Start Date</th>
<th>End Date</th>
<th>Weeks Attended for term</th>
<th>Universal Hours Claimed per week</th>
<th>Universal Hours Claimed for term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider 1</td>
<td>01/01/2019</td>
<td>19/01/2019</td>
<td>3</td>
<td>15</td>
<td>45</td>
</tr>
<tr>
<td>Provider 2</td>
<td>22/01/2019</td>
<td></td>
<td>10</td>
<td>15</td>
<td>150</td>
</tr>
</tbody>
</table>

An end date will end a claim. If you are not claiming for the child, enter zeros. That way we know you do not intend to make a claim.

**NOTE – for schools only** - Because of the way schools are set up in our database, other children in your school who are in the eligible date of birth range will show on your Task. **Do not ‘end date’ these children if they are still in the school.** These children may be in the school’s reception class, for example. If those children are in your reception class or another part of the school not funded by the Early Years Funding team, **do not add an end date.** Adding an end date will take the children off the school roll.

For all providers, if the child is leaving/has left your setting and will not be returning (and for schools, this means leaving the school completely), then you will need to enter an ‘end date’. The date must be in the current term. For example, if the child left the previous term, say in October, you will not be able to enter October as an end date in a Spring Task. You will need to enter a Spring date so you would enter 1 January, or 01/01/2019 as the end date.
IMPORTANT! If you are a school, all of the children within the Early Years Funding date of birth range will be shown on your form, even if they are in your Reception class. Applying an end date will also remove them from your school roll. Aside from amendments, only use an end date if the child has left your school.

**NOTE** use the whole year number eg 2019. The system will not accept the shortened version eg 19.

**SECTION 5 – ADDING THE HOURS**

To help the team to validate your claim, please select whether you are making a Non-Stretched Offer (NON) or a Stretched Offer (STR) claim in the drop down box. Selecting this will not calculate your claim but only flags this to the team.

There are two options to make your claim as below.

**Entering your claim option 1** Complete the **Weeks Claimed for term** and **Universal hours Claimed per week**. If you are claiming Extended Entitlement, then complete **Extended Hours Claimed per week**. The Universal (and Extended) Hours Claimed for Term calculate by multiplying the Weeks Claimed for term x the Universal (and/or Extended) Hours Claimed per week.

Select ‘Edit Headcount’.

This option works well if you are delivering the Universal and Extended hours over the same number of weeks. When you receive your Task, the default weeks for a 38 week claim will be populated. This will be 14 weeks in Autumn, 13 weeks in Summer and 11 weeks in Spring. You may keep these weeks if they are correct or you may overwrite them as long as you stay within the caps used in Cambridgeshire and are delivering the total hours that you are claiming for.

The Extended Entitlement Hours columns will only be available if the eligibility code has been validated; the screenshot below shows two examples where one is available and one is not available.
You will need to overwrite the number of weeks if your claim is different. For example, the 14 weeks in the screenshot shown above has been overwritten with 10 hours in the screenshot below. The Universal Hours Claimed per week have been entered at 15 hours and this has calculated 150 hours in the Universal Hours Claimed for term column. A further 10 hours has been entered in the Extended Hours Claimed per week and this has calculated the Weeks Claimed for term x Extended Hours Claimed per week to give 100 hours for Extended Hours Claimed for Term.

**Entering your claim option 2** If the Hours Claimed per week are difficult to fit into the automatic calculation,
- Select the ‘Stretched Offer (STR)’ or ‘Non-Stretched Offer (NON)’ from the drop down box to alert us to the method you are using
- enter zero for the **Weeks Claimed for term**
- enter zero for the **Universal (and/or Extended) Hours Claimed per week**
- enter the **Universal (and/or Extended) Hours Claimed for term**

This is the preferred method if claiming a stretched claim or sharing funding with other providers as it creates fewer conflicts and is easier to understand. It is also useful if you are claiming Universal hours over a set number of weeks but are claiming Extended hours over another number of weeks.

**ALL CLAIMS; EITHER METHOD**
In the example below, you will notice that the zeros are green and the other numbers are blue.
Where you enter or change any numbers, they will turn blue.

Where you see 0.00 in the fields in the Extended Hours columns, you may enter data in those fields.

Where those fields are blank, you will not be able to enter any data. If the child has an Eligibility Code, once you validate that code, those fields will become available.

**REMEMBER!** You MUST separate the Universal and Extended hours on the claim. If the child is attending another setting, this is especially important as the total hours for each are added together. For example, the maximum number of Autumn hours for a stretched claim is 182.4 hours. If between two providers you are claiming 182.4 hours for Universal and Extended and you both add your hours to Universal, the claim will show 364.8 hours for Universal which of course is too many. The claim will not be paid until it is submitted correctly.

**Important notes!**

**NOTE 1** If the claim is a Stretched Claim, use the drop down text in the ‘Stretched Offer’ field and select ‘Stretched offer (STR)’ to alert the EYF team that this is a stretched claim. Note that no automatic calculation is performed by selecting either choice.

Use either **Option 1** above claiming with number of weeks x number of hours per week or **Option 2** using zero weeks and hours per week and entering the total hours for the term.

If using Option 1) For a full Stretched claim, enter 11.4 into the Hours Claimed per week column unless the child is attending fewer hours per week in which case, enter the lower number. The stretched number of weeks x 11.4 hours will give the full stretched claim over the year. Please refer to the Guide to the administration of early years funding claims for more information about making claims.

**NOTE 2** If the claim is Non-stretched or over the 38 weeks in the year, select the drop down text in the ‘Stretched Offer’ field and select ‘Non-Stretched Offer (NON)’ to alert the EYF team that this is a non-stretched claim. Note that no automatic calculation is performed by selecting either choice.

Use either **Option 1** above claiming with number of weeks x number of hours per week or **Option 2** using zero weeks and hours per week and entering the total hours for the term.

If using Option 1) Enter a maximum of 15 into the Hours Claimed per week column. The total hours will calculate by multiplying the number of hours per week and the number of weeks.

**NOTE 3** Be Advised! If you enter details and then change those details in one field, you must check and re-enter the claim again. The fields re-calculate and it may not be the claim you wish to make! The system is designed to put all hours in the Universal columns first so if you make a change, check it!

**NOTE 4** Make a habit of always double checking your entry.
NOTE 5 If you are not claiming for the child, enter zeros. That way we know you do not intend to make a claim. NEVER overwrite the name of the child with that of another.

SECTION 6 – MAKING CHANGES IN A TASK
If you are in your Interim, Actual or Amendment Task and you want to go back and correct something you have already typed in, be advised the entire claim for that child will recalculate. This is because the system assumes that all hours will be applied for Universal first and then to Extended. If you change the Universal hours, the Extended hours will zero out to allow you to amend that claim whether you wanted to or not.

You need to re-enter the whole claim for that child. You need to start at the beginning and tab across to complete the claim. Then, double-check!

SECTION 7 – SUBMIT YOUR TASK
When you submit your Task, you will need to agree to a certification and hold a signed Funding Application.

You can Save your Task as you go along. You must Submit your Task for us to see your data.

When you have added all the children to the list and made any changes, select Submit. You may add children at different intervals up to the deadline – please select the Submit button each time you do so. We will not see the data unless you submit the data. If you make any changes, you must select the Submit button again. Otherwise, we will not see those changes.