



Education & Skills
Funding Agency

Funding claims user guide

June 2019

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Introduction

The aim of this document is to:

- provide an overview of the funding claims process
- provide detailed key user functionality
- demonstrate key areas of the system
- identify where and who to go for further help and support

It covers the following:

1. How do I make a funding claim?
2. Filing in the form
3. How to submit your claim
4. Reports
5. Help and support



How do I make a funding claim?

To get started:

1. Go to <https://submitlearnerdatabeta.fasst.org.uk/>
2. Sign in to the service using your usual IDAMS log in details
3. Choose 'Funding claims: view and submit from the options on screen'

The screenshot shows the 'Submit learner data' page on the GOV.UK website. At the top, there is a black header with the GOV.UK logo and the text 'Submit learner data'. Below the header, a blue bar contains the word 'BETA' and a message: 'This is a new service – your [feedback](#) will help us to improve it.' In the top right corner, there is a session ID 'Sfstest10004607 UKPRN:10004607' and a 'Sign out' link. The main heading is 'What do you want to do?'. There are two radio button options: 'Funding claims: view and submit' (which is selected) and 'Download reports'. Below these options is a green 'Continue' button. On the right side, there is a 'Help and support' section with the heading 'ESFA support desk'. It lists contact information: Telephone: 0370 267 0001, Monday to Thursday, 8:30am to 5:00pm, Friday, 8:30am to 4:00pm, and Email: sde.servicedesk@education.gov.uk.

4. You'll be taken to a summary page. If a funding claim is due, you'll see a green button labelled 'Start claim'. Click that button to get started.

The screenshot shows the 'Funding claim submissions' page on the GOV.UK website. At the top, there is a black header with the GOV.UK logo and the text 'Submit learner data'. Below the header, a blue bar contains the word 'BETA' and a message: 'This is a new service – your [feedback](#) will help us to improve it.' In the top right corner, there is a session ID 'Sfstest10004607 UKPRN:10004607' and a 'Sign out' link. The main heading is 'Funding claim submissions'. Below the heading, there is a section for 'Year end forecast 2018/19'. It says 'Open for submission' and has a green 'Start claim' button. On the right side, there is a blue box with the text '11 days until year end forecast closes on Friday 14 June at 5:10pm'. Below this, there is a 'More actions' section with two links: 'Submit another file type' and 'View ILR data'.

Note: if a funding claim isn't open for submissions, 'submit a funding claim' won't be an option in step 3, above. You can still view your funding claims summary page. Choose

'Download reports' when asked 'what do you want to do?'. Then select the 'View your funding claims' link.

Filling in the form

If you have contracts for both adult funding and 16 to 19 funding, these parts of the form are separate, across 2 web pages.

You can save the form to complete later at any time.

If you submit ILR/EAS data

For **mid-year and year-end funding claims**, we need you to supply up-to-date figures for delivery.

We'll pull through the 'delivery to date' figures based on your ILR/EAS data submissions. As a provider, you need to fill in the 'forecasted delivery' for each field for the rest of the year.

In your **final funding claim**, you only need to agree the figures as we'll use your ILR/EAS to pull through your actual delivery figures.

The 'exceptional adjustments' column must only be used to make changes if you've agreed an exceptional adjustment with us beforehand.

If you don't make full ILR/EAS data returns

For **mid-year and year end funding claims**, we need you to supply up-to-date figures for 'delivery to date', plus 'forecasted delivery' for the rest of the year.

In your **final funding claim**, you just need to supply and confirm figures for the delivery to date.

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Year end forecast funding claim

Adult Education Budget (non-procured)

Contract value: £12683467.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Other Learning - Programme Funding	4999096.28	0.00	£4,999,096.28
Other Learning - Learning Support	0.00	7977002.13	£7,977,002.13
19-24 Traineeships Programme Funding	0.00	0.00	£0.00
19-24 Traineeships Learning Support	0.00	0.00	£0.00
19-24 Traineeships Learner Support	0.00	0.00	£0.00
Learner Support - 18+ Mandate	0.00	0.00	£0.00
Learner Support - 20+ Children	0.00	0.00	£0.00
Learner Support - Residential Access Fund	0.00	0.00	£0.00
Learner Support - Administration Expenditure	0.00	0.00	£0.00
Adult Education Budget (non-procured) Total	£4,999,096.28	£7,977,002.13	£12,976,098.41

Learner Support (for procured AEB)

Learner Support Contract Value: £10879.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
18+ Mandate	0.00	0.00	£0.00
20+ Children	8780.00	0.00	£8,780.00
Residential Access Fund	0.00	2128.28	£2,128.28
Administration Expenditure	842.78	0.00	£842.78
Learner Support Total	£9,622.78	£2,128.28	£11,751.06

Advanced Learner Loans Bursary

Loans Bursary Contract Value: £1182645.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Bursary Funding	£22,280.00	0.00	£22,280.00
Mandate	0.00	76878.00	£76,878.00
Children	8728.00	0.00	£8,728.00
Residential Access Fund	0.00	0.00	£0.00
Area Costs	£12,010.97	0.00	£12,010.97
Excess Claims	£0.00	£28.00	£28.00
Administration Expenditure	0.00	0.00	£0.00
Advanced Learner Loans Bursary Total	£42,988.97	£79,106.00	£122,094.97

[Save and Finish later](#) [Save and Continue](#)

Figure 3: a funding claims form example. You can save the form using the buttons at the bottom of the form.

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Year end forecast funding claim

Adult Education Budget (non-procured)

Contract value: £12683467.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Other Learning - Programme Funding	4999096.28	0.00	£4,999,096.28
Other Learning - Learning Support	0.00	7977002.13	£7,977,002.13
19-24 Traineeships Programme Funding	0.00	0.00	£0.00

Figure 4: if you submit ILR/EAS data, we may prefill the delivery to date column based on this data.

Errors

You won't be able to submit a form until it's clear of any errors. Errors will appear in line, where the problem is on the form in red text.

As soon as the errors are corrected, you'll be able to continue.

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Year end forecast funding claim

14-16 Direct Funded Students (Row A)

	Student numbers
540+ hours (Band 5)	<p>This figure can be a maximum of 6 digits with no decimal places.</p> <input type="text" value="95.5"/>
450+ hours (Band 4a)	<input type="text" value="96"/>
450 to 539 hours (Band 4b)	<input type="text" value="97"/>

Figure 5: an example of an error that stops you from submitting your form.

How to submit your claim

When you're happy with the figures on the form select 'Continue'.

We'll validate your form and let you know if there's anything that doesn't seem right, e.g. not entering data we were expecting figures for. You can choose to go back and edit your form or continue.

If you continue or if everything looks fine with your form, you'll see a declaration which you need to read and agree to.

Tick the check box to agree and then select 'Confirm and submit'.

You'll receive a confirmation message and an explanation of what happens next.

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Please check your data

Learner support (for procured AEB)

You entered: £0.00

Are you sure you want to leave the figure at £0.00

[Edit](#)

Continue

Figure 6: a validation message example

Your declaration

As far as I know, this funding is complete and is in line with published 2018 to 2019 funding and performance management rules:

[Adult education budget funding rules](#)

[Advanced learner loans funding rules](#)

[Advice: funding regulations for post-a6 provision](#)

I confirm the data is correct

Save and finish later

Confirm and Submit

Figure 7: a declaration example

**You've submitted your
data successfully**

[View your funding claim submissions](#)

What happens next

You can edit your data and submit again until 14 June 2019.

[What did you think of this service?](#) (takes 30 seconds)

Figure 8: the confirmation example

Submission reports

We'll store all your submissions going forward. You can access them any time from the 'Your submissions' page.

Select 'View submission' next to the submission report you want to view. You'll then see a page that presents you with the data you submitted.

GOV.UK Submit funding claims

Your submissions

Year end 2018/19

Open for submission [Resubmit claim](#)

4 days
until year end closes on
Thursday 7 February at
6:00pm

Last submitted: 02 June 2019 at 12:15pm [View submission](#)

Figure 9: how to view your submissions on the 'Your submissions' page

Help and support

Email: sde.servicedesk@education.gov.uk

Telephone: 0370 267 0001

Service Desk opening hours

8:30am to 5:00pm Monday to Friday

8:30am to 4:00pm Friday

8:30am to 6:00pm Days when ILR returns are due

The Service Desk is closed weekends and bank holidays. Queries can be raised out of hours by email.



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