

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:

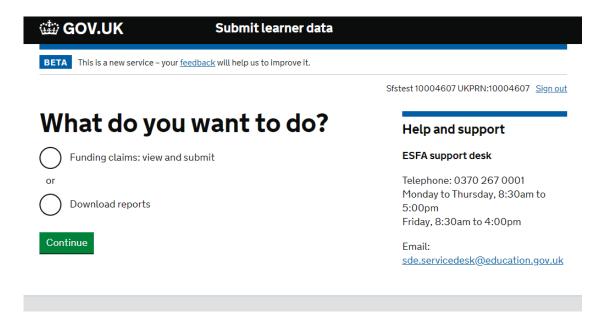
- 1. How do I make a funding claim?
- 2. Filing in the form
- 3. How to submit your claim
- 4. Reports
- 5. Help and support



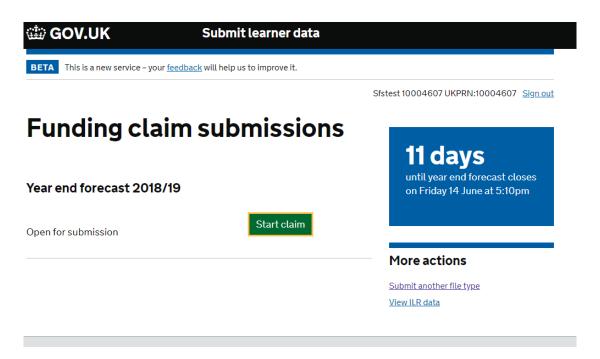
How do I make a funding claim?

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'



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.



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.

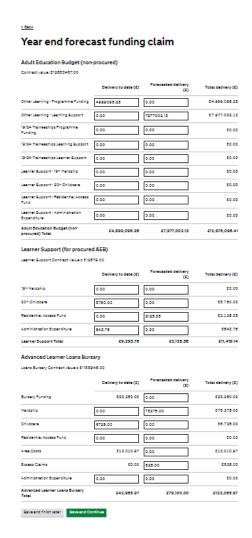


Figure 3: a funding claims form example. You can save the form using the buttons at the bottom of the form.

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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.

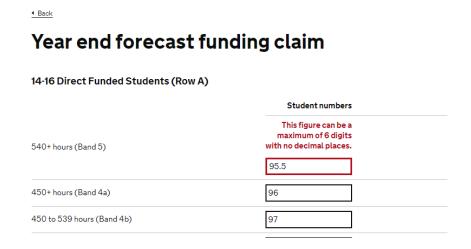


Figure 5: an example of an error that stops you from submitting your form.

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.

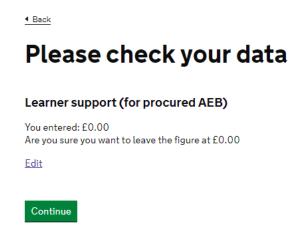


Figure 6: a validation message example

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 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.

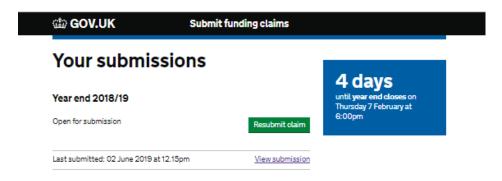


Figure 9: how to view your submissions on the 'Your submissions' page

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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