Education & Skills Funding Agency

Funding claims user guide

January 2020

Contents

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

| 1. How do I make a funding claim? | 2. Filling 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'

Figure 1: an example of how to access funding claims

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

Figure 2: an example showing submissions and claim dates

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.

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

We will 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.

For the deliverables lines that are none formula funded (e.g. community learning – programme funding) you will need to enter your actual delivery and forecast figures from your own records as these are not pulled through your ILR/EAS data submissions.

In your **final funding claim**:
You only need to agree the figures, as we will 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.

For the deliverables lines that are none formula funded (e.g. community learning), you will need to enter your actual delivery from your own records as these are not pulled through your ILR/EAS data submissions.

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

Mid Year (R06) Funding Claim 2019 to 2020

ESFA funded Adult Education Budget (non-procured)

Adult Education Budget contract value = £1,352,053.00
...of which Community Learning contract value = £26,496.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Adult Skills - programme funding	£0.00	£0.00	£0.00
Adult Skills - learning support	£0.00	£0.00	£0.00
Learner Support – 19+ hardship	£0.00	£0.00	£0.00
Learner Support - 20+ childcare	£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
Community Learning - programme funding	£0.00	£0.00	£0.00
ESFA funded Adult Education Budget (non-procured) Total	**£0.00**	**£0.00**	**£0.00**

Advanced Learner Loans Bursary

Loans Bursary contract value = £322,122.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Bursary funding	£0.00	£0.00	£0.00
Hardship	£0.00	£0.00	£0.00
Childcare	£0.00	£0.00	£0.00
Residential access fund	£0.00	£0.00	£0.00
Area costs	£0.00	£0.00	£0.00
Excess claims	£0.00	£0.00	£0.00
Administration expenditure	£0.00	£0.00	£0.00
Advanced Learner Loans Bursary Total	**£0.00**	**£0.00**	**£0.00**

Errors

You will not 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 will be able to continue.

Figure 4: an example of an error that stops you from submitting your form.

Mid Year (R06) Funding Claim 2019 to 2020

ESFA funded Adult Education Budget (non-procured)

Adult Education Budget contract value = £1,352,053.00
...of which Community Learning contract value = £26,496.00

	Delivery to date (£)	Forecasted delivery (£)	Total delivery (£)
Adult Skills - programme funding	£0.00	This figure can be a maximum of 8 digits plus 2 decimal places. £999,999,999,999.0	£0.00

How to submit your claim

When you are happy with the figures on the form select 'Save and continue'.

We will validate your form and let you know if there is anything that does not seem correct, 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 will see a declaration which you need to read and agree to.

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

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

Once you have submitted your Final Funding Claims on Submit Learner Data, you will be able to view and sign it on Manage Your Education and Skills Funding within 15 minutes.

Figure 5: a validation message example

Please check your data

AEB Community Learning - Programme Funding

You entered: £0.00
Are you sure you want to leave the figure at £0.00?

Edit

Continue

Figure 6: a declaration example

Your declaration

As far as I know, this funding is complete and is in line with published 2019 to 2020 funding and performance management rules:

Adult education budget funding rules
Advanced learner loans funding rules
Advice: funding regulations for post-16 provision

☐ I confirm the data is correct

Save and finish later   Confirm and Submit

Figure 7: the confirmation example

You've submitted your data successfully
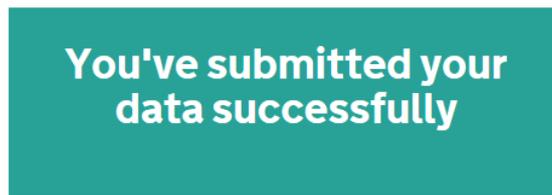
View your funding claim submissions

What happens next

You can edit your data and submit again until 13 February 2020.

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

Submission reports

We will store all your submissions going forward. You can access them any time from the 'Funding claim submissions' page.

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

Figure 8: how to view your submissions on the 'Your submissions' page

Help and support

Email: sde.servicedesk@education.gov.uk
Enquiry form: ESFA enquiry form
Telephone: 0370 267 0001

ESFA Support Desk opening hours

9:00am to 5:00pm   Monday to Thursday

9:00am to 4:00pm   Friday

8:30am to 6:00pm   On ILR return days

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

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