



Education
Funding
Agency

Academy financial returns submission site

**How to submit your academy trust's
financial returns**

January 2014

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Part 1: Introduction

From January 2014, the process for academies and academy trusts to submit financial returns changed. Rather than submitting by email to the Education Funding Agency (EFA), academies are required to upload returns via [Deloitte OnLine](#), a new website hosted by Deloitte. Deloitte are delivery partners to the EFA in the review and consolidation of financial returns. The new process allows for more efficient collation and review of returns and aims to reduce the number of queries raised on the returns.

The first return that academy trusts were required to submit via this route was the [accounts return](#) for the 2012 to 2013 academic year and accountant's report. The submission deadline was 31 January 2014. Academy trusts that did not prepare financial statements at 31 August 2013, or that opened new academies between 1 September 2013 and 31 March 2014, were not required to complete the 2012 to 2013 annual accounts return. They need to submit a [March 2014 accounts return](#) via Deloitte OnLine by 27 June 2014.

Academy trusts also need to use Deloitte OnLine to submit their [budget forecasts](#).

The following guide provides 'step-by-step' instructions for logging in and uploading returns. It is for both multi-academy trusts (MATs) and single-academy trusts (SATs). If your academy is part of a MAT, please ensure you adhere to the trust's guidance on submitting returns at single academy level or group level. Please also note that when documents are submitted via the site, it must be confirmed that they are done so on behalf of the trust's Accounting Officer.

You should read this document in conjunction with the [guides](#) to completing your accounts returns and budget forecasts.

You should not upload your trust's 2012 to 2013 financial statements, management letter or value for money statement onto the site. These documents were due on 31 December 2013 and should have been sent to AcademiesFinancialMonitoring.efa@education.gsi.gov.uk.

Part 2: Using the site

2.1 First time access to the site: Credentials

Deloitte will send the login emails to the contact EFA has for each academy. In most cases, this will be the academy principal. For academies within multi-academy trusts, this may be the lead contact for the MAT or the academy principal.

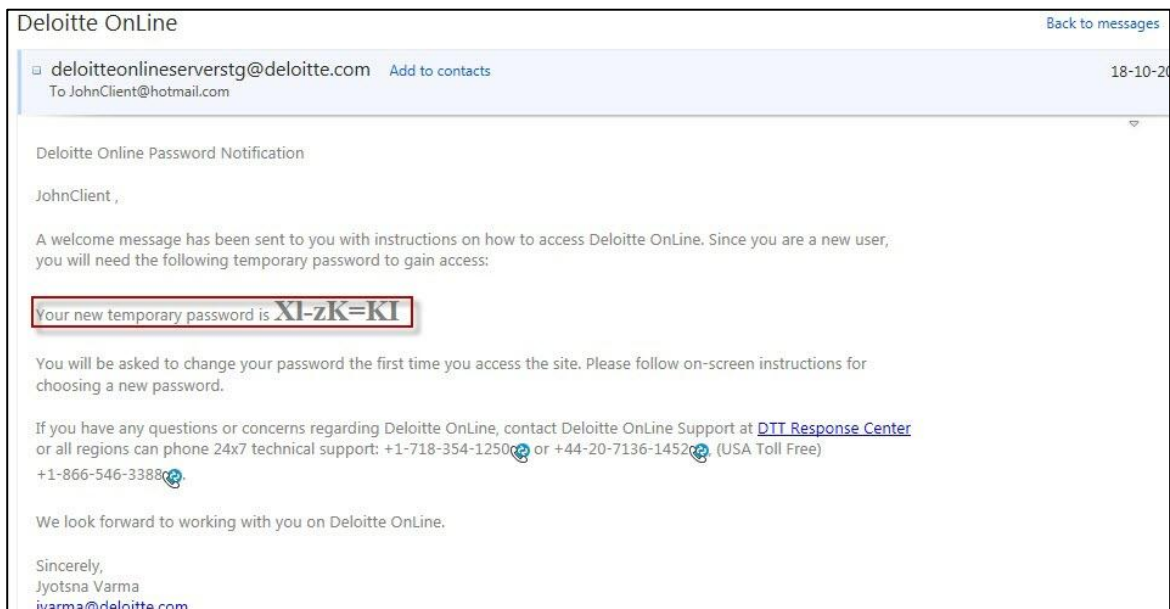
As an academy contact, you will receive the following emails from deloitteonlineserver@deloitte.com:

1. Welcome email, which includes your username.
2. Password Notification email containing a temporary password.

It is recommended that you keep these emails for future reference.

If you do not receive these two emails it is recommended you check that they are not in your spam folder. You may also wish to check with your IT department if there is any other reason you may not have received the emails. You may also wish to inform the Deloitte team at [ReturnsSubmissionTeam@deloitte.co.uk](mailto>ReturnsSubmissionTeam@deloitte.co.uk).

Illustrative temporary password email:



2.2 First time access: Logging in

The full address of the site is

https://audit.global.deloitteonline.com/sites/the_education_funding_agency/SitePages/Home.aspx

We recommend that you bookmark the web address for faster access. It is important that you only do this once you have successfully logged into the site.

When the Deloitte OnLine login page displays in your browser, type your username into the Username box, then click **Log in**.

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Welcome to Deloitte OnLine
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Deloitte OnLine is a client-focused website aimed at enhancing your communication and collaboration with the people of Deloitte. Designed to increase your visibility into how we can best solve your business challenges, Deloitte OnLine enriches the interaction between your team and ours.

To access Deloitte OnLine, log in below with your User name and password. If you need an account or would like more information about how Deloitte OnLine can start to work for you, contact your Deloitte client service team.

Fields in **Bold** are required.

Username

From all regions
+ 1-718-354-1250 or
+ 44-20-7136-1452

From United States and Canada
Toll Free + 1-866-546-3388

Contact us via email
dtrresponsecenter@deloitte.com

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On the next screen, enter the temporary password provided within the Password Notification email, then click **Log in**.

TIP: Copy and paste the temporary password from the Password Notification email into the password box.

2.3 First time access: Security

The first time you log in, you will need to do the following before you can access the site:

1. Change your password
2. Create security question responses
3. Accept the Terms and Conditions of usage.

The site will prompt you to address these areas on your first login.

Changing your password

You must create a new password to replace your temporary password.

Enter your temporary password and create a new password.

Click **Save Changes**.

Account Information

Please change your temporary password

Change Password

Temporary Password: [masked]

New Password: [masked] [Password rules](#)

Confirm Password: [masked]

Save Changes Reset

Note: You can view the password rules by clicking **Password rules** link.

Security Questions

Security questions are used to verify your identity if you forget your password and/or need to contact Deloitte OnLine Technical Support.

The first time you access Deloitte OnLine, you are required to create at least 4 security questions.

Ensure that your answer to each question is simple for you to remember and difficult for others to guess. Answers are not case sensitive.

You must recall the exact answer to each question to verify your identity.

Click **Submit** after creating the questions.

Note: If you do not remember the answers to your security questions, and need to reset your password, you will need to contact dtresponsecenter@deloitte.com for assistance.

Important: You must create security questions before you can login to the homepage. [Contact us](#) if you have any questions or concerns.

If you are registering for the first time:

- You must select and answer at least 4 different questions. If you forgot your password, the questions will be used to confirm your identity.
- You can change your questions and responses after logging in to the site.

If you are already logged in and are changing your questions and responses:

- You will not be able to view your previous answers, just as you cannot see a previous password when you change it.
- The questions you selected previously will be displayed. You can change a question by clicking the question dropdown and selecting a new one. You can change an answer by typing over the previous answer.
- You must have at least 4 questions and answers, but you can add as many as you like. If you have more than 4 questions, you can delete a question.

Questions	Answers	Delete Question
What was the name of your first pet?	petfish	
What was your childhood nickname?	nickname	
What was your childhood phone number including area code	1234567890	
What was your favorite sport you played as a child?	sport	

[Add Another Question](#)

[Submit](#)

Once you have created and submitted your security questions, click **Continue** to login with your new password.

Enter your **Username** (registered email address) and new **Password**. Click **Log In**.

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To access Deloitte OnLine, log in below with your User name and password. If you need an account or would like more information about how Deloitte OnLine can start to work for you, contact your Deloitte client service team.

Fields in **Bold** are required.

Username

Password:

[Forgot Password](#)

[Log in](#) [Reset](#)

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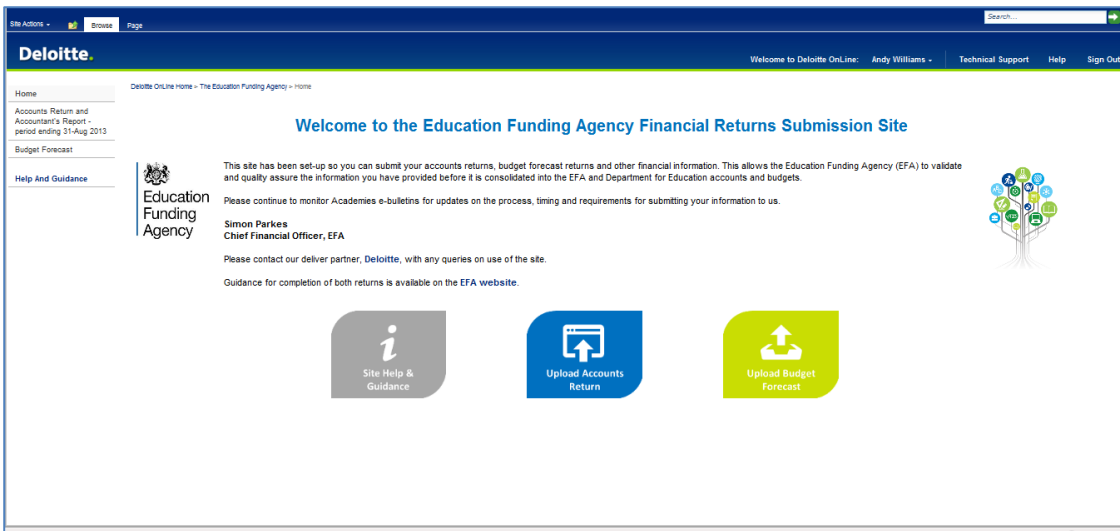
Contact us via email
 dtresponsecenter@deloitte.com

Terms and conditions of use

After logging in, Deloitte OnLine displays the Deloitte Terms and Conditions of Use page. These are standard terms and conditions and do not have any bearing on the relationship with the EFA.

Click I Agree at the bottom of the page to use Deloitte OnLine.

You will now be directed to the homepage of the site:



Subsequent access to the site

Enter the site, input your username and new password details and then click **Log In**.



What if I forget my password?

If you forget your password, you can reset it by following these steps:

1. On the Deloitte OnLine login page, enter your user name and then click on the **Forgot Password** link.
2. Enter your responses to the security questions - you are required to answer at least 3 correctly. If you do not remember the answers, contact Deloitte OnLine Technical Support for assistance.
3. Next, enter a new password and click **Change Password**.

4. You will receive an email notification that your password has been updated.
5. You can now login with your new password.

What if my password expires?

Your Deloitte OnLine password is valid for 90 days. If your password is not updated, it will expire and you will need to reset your password. In this scenario, please follow the **Forgot Password** link as described above.

Technical support

There are several different methods to request help in Deloitte OnLine.

1. Access the **Help** link in the site to access online help, located on the banner:



2. Access the **Technical Support** form, also located on the banner, in order to submit a support request.
3. Contact information for support can also be found on the login page:

Telephone: 0207 007 3011

Email: [ReturnsSubmissionTeam@deloitte.co.uk](mailto>ReturnsSubmissionTeam@deloitte.co.uk).

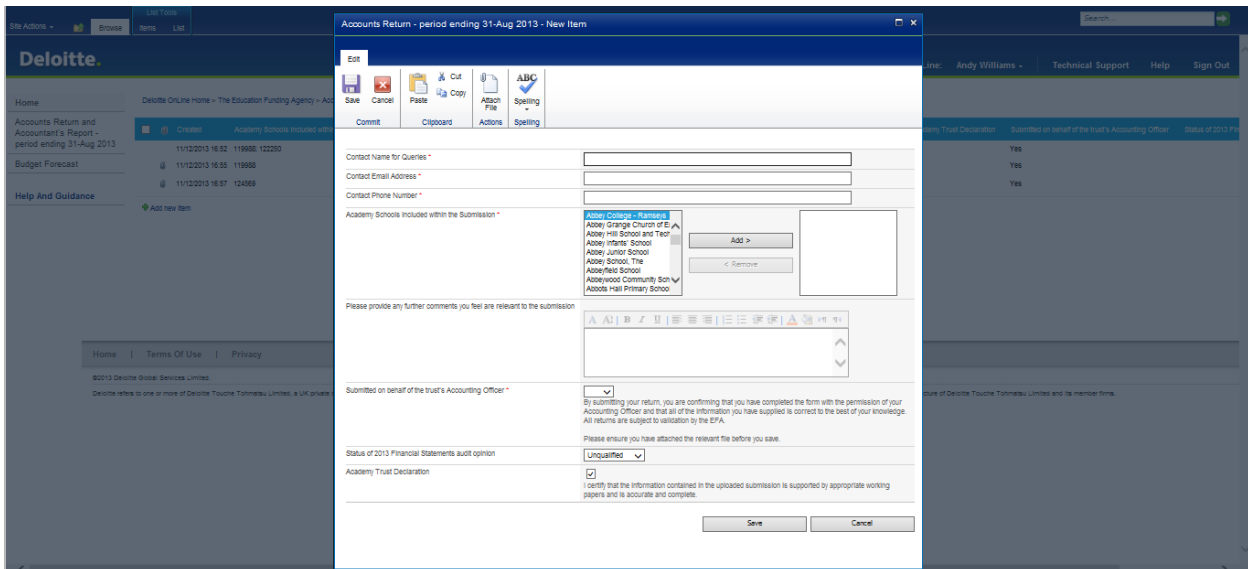
2.4 Uploading documents

Document upload options are listed on the left-hand side of the homepage. Buttons at the bottom of the homepage screen can also be used.

Select the button relating to the document you would like to upload.

On the next screen, click **Add new item**

Complete contact details and all other mandatory fields including the academies to which the return relates:



Select the **Attach file** icon towards the top of the box.

Select the appropriate file using the “browse” function and click **OK**.

Click **Save** and you will see a screen listing your uploads. Check that there is an attachment saved for each upload. An attachment will be denoted by a paperclip icon at the left-hand side of the list. For the August Accounts Return submission you will need to repeat the process to add the Accountant’s Report. There should then be two items listed.

Note: Please ensure that all returns are uploaded in Excel format and the Accountant’s report is uploaded in PDF format. You must submit returns in their original template form. **Documents will be rejected if they are uploaded in the incorrect format.**

Sign out once you have completed the upload of documents.



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