

# **ESTABLISHMENT PORTAL**

## **Eligibility Checks**

### **Checking if a code is valid**

**Confidentiality / Document Control**

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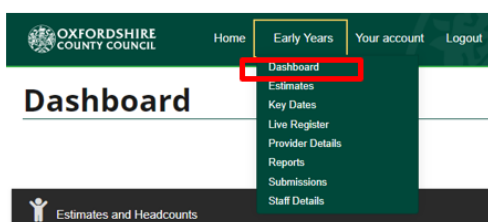
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## 1. Explanation of the types of checks

The only funded hours that do not require a check is if a child is age 3 or 4 (this must be the term after their third birthday) and they only wish to take up 15 hours of funding. If this is the case, then you are not required to run a check as this is known as universal funding. The child can be added to the Live register.

For all other children please follow the below ( if you area school / academy then please refer to the specific sections within this guidance) :

After logging in to the portal, you will need to navigate to your Early Years Dashboard area.



At the bottom of the page, you will see a button that says 'Online Eligibility Checks' area.



From April 2024 there is a new format of eligibility checks, as follows:

1. 2-Year-Old Application refers to 2 Year Olds whose families might be in receipt of specific benefits or for other non-economic reasons. Click here for [criteria](#) .
  - 1.a. If you wish to help a parent out with completing an assisted application on their behalf for this funding, then please click [here](#) or go to section 3

[2 Year Old Application](#)

. We advise providers to use this entitlement in the first instance as the parent will not be required to reconfirm their code every 3 months.

1.b. If you already have been given a 10-digit code with format XX-XXXX-XXXX then refer to instruction in [section 3](#)

2. Working Parent Entitlement (otherwise known as Working Families Entitlement) for families of children:

- 9 months (from September 2024, the term after they turn 9 months)
- 2-year-olds (from April 2024, the term after they turn 2)
- 3&4-year-olds now and ongoing. This will be for the extended hours.

Click here for the [criteria](#)

If you wish to complete an eligibility check for a family on this criterion, please click [here](#)

[Age / Eligibility Checks](#)

## 2. Age/ Eligibility Check


This section allows you to check the age of a child by their Date of birth.

Age / Eligibility Checks

Click on

Enter the child's DOB and press check age.

### Age / Eligibility Checks

Child's Date Of Birth  

In this example you can see the portal lets you know the current term and the following terms eligibility based on DOB. If you would like to check another DOB or entered the DOB incorrectly then you are able to press reset

This child's Funding Age for the current term and next term is 2 year old.


Child's Date Of Birth  

Here is an example of a child who turns three within the summer term and therefore will need to wait until September (next term in this example) for 3&4-year-old funding unless they have an eligible 2-year-old funding code. From either of the above criteria in [section 1](#).

This child's Funding Age for the current term is 2 year old, next term they will be 3 year old.

Child's Date Of Birth  

You then have 2 following options:

- Eligibility Check   2 Year Old Check  
 Working Parent Eligibility Check

Any family that falls under the below criteria please click


Working Parent Eligibility Check

Working Parent Entitlement (otherwise known as Working Families Entitlement) for families of children:

- 9 months (from September 2024, the term after they turn 9 months)

- 2-year-olds (from April 2024, the term after they turn 2)
  - 3&4-year-olds now and ongoing. This will be for the extended hours.
- Click here for the [criteria](#)

This will open the following screen for you to input the data and run a check.

Eligibility Check   2 Year Old Check  
 Working Parent Eligibility Check

Child's Date Of Birth \*  

Parent/Guardian's NI number \*

Eligibility code \*

Do you hold signed authorisation from the parent to perform this check? \*  Yes  
 No

**Check Eligibility**

You must make sure you have consent from a parent before running this check- this field is automatically set at no- once you have consent from the parent / carer please press yes.

Do you hold signed authorisation from the parent to perform this check? \*  Yes  
 No

You will receive the below error if you do not have consent.

**✘ Cannot perform eligibility check without signed consent from a Parent/Guardian.**

Press 'Check eligibility' and this will give you your result.

Some examples of the results you may see are shown below:

1.

✓ This child is eligible to claim working parent entitlement from 31-Jan-2024 until 21-May-2024. Their grace period ends on 31-Aug-2024.

This is informing you that the parent applied or reconfirmed their eligibility with HMRC on 31<sup>st</sup> January 2024. The parent will need to reconfirm their eligibility with HMRC on 21<sup>st</sup> May 2024, however they have a Grace period until 31<sup>st</sup> August which allows them to claim funding up until this Grace period end date. If the parent does not reconfirm by this time the parent will fall out of eligibility.

2.

! This child was eligible to claim working parent entitlement from 15-Aug-2023 until 14-Mar-2024, but they are now in their grace period which ends on 31-Aug-2024. This code will need to be renewed with HMRC before re-checking it.

This message is informing you on the date the check was ran (02/04/2024) the child has fallen out of eligibility as the parent has not reconfirmed their code with HMRC which was due to be reconfirmed on 14<sup>th</sup> March 2023. The child could still be eligible but only if they claimed the working parent entitlement last term. A child would not be eligible if they are starting a new provider as a child cannot start a new provider whilst in their grace period.

3.

✖ Eligibility could not be determined using the details provided

This example is informing you that the details entered could not be matched to an eligible code. This may just be because the system could not match the details to an eligible code- please double check with the parent's government gateway account that all the details are correct. Specifically, this will be checking the DOB of the child, the parents NI number and the 11-digit code. Re-check to code again.

4.

✖ Service failed: Eligibility code invalid

This error message is likely to mean there is a space within the code or NI number field- please check and try again.

For those codes that are eligible you will see the button 'Add to Live register' appears.

Check Eligibility   Reset   Add to Live Register

If you wish to add the child straight away to your live register in preparation for your termly headcount, please do this now. Please note that this must be a child that has a start date of today or in the past as you are unable to add children to your Live register who are due to start.

If the child's start date is in the future, then please go back to your Live register, at the top of the page you will see a button that says 'future starters'. Click on this button.


Future Starters (0)   Add Child


Then click on 'Add Future Starter'.

Add Future Starter

Please note if you are a school or an Academy you will not have the option of a future start and you will have to wait until the start date of the child arrives based on the data you have in your MIS.

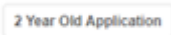
Please refer to our guidance notes on Maintaining your Live Register for further guidance on adding and updating the child's details.

 [03 Establishment Portal\\_Maintaining your 'Live register' for PVI & Childminders](#)

 [04 Establishment Portal\\_Maintaining your 'Live register' for Schools and Academies](#)

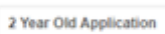
### 3 2-Year-Old Assisted Application

2-Year-Old Application refers to 2 Year Olds whose families might be in receipt of specific benefits or for other non-economic reasons. Click here for [criteria](#) . If you wish to help a parent out with completing an assisted application on their behalf for this funding,

then please click  . We advise providers to use this entitlement in the first instance as the parent will not be required to reconfirm their code every 3 months.

Please note this is not the working parent entitlement and should not be used for any codes that are 11-digits. All codes under this criterion will be 10-digits long and will be formatted XX-XXXX-XXXX. These codes are generated by Oxfordshire County Council.

If you already have been given a code then there is not requirement for you to complete another assisted application – you can refer to point 1 or 2 below.

After pressing  you will be required to fill out the application on behalf of the parent. Please double check with the parent first that they have not already applied and do not currently have a code formatted XX-XXXX-XXXX. Continue to fill out the parents' details and submit the application.

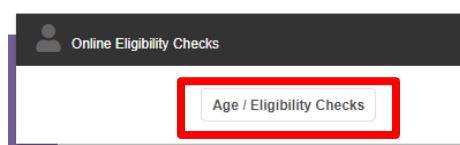
Once submitted the application will come through to The Early Education Funding Team to assess. You will receive an email notifying you to log back into the portal to check the result.

Once you are in receipt of the 10-digit code there are 2 options below – please follow the guidance that applies to your situation:

1. If the child not currently on your future starter list or your Live register.

Go to Early years - 'Dashboard'.



Under 'Online Eligibility Checks', you will find 'Age/ Eligibility Checks' button. Press this button.



Enter the child's DOB as below and press check age.


This child's Funding Age for the current term and next term is 2 year old.

Child's Date Of Birth

This will inform you of the child funding age.

Select '2-year-old check'.

Eligibility Check   2 Year Old Check  
 Working Parent Eligibility Check

This opens the following screen.

Select yes to the first question as you already have a code. Then continue to populate the information required. These details must match the original application exactly.


Does the Parent / Guardian have a 2 Year Old Application Reference Number from Oxfordshire County Council?  Yes  No


Enter the reference number, date that proof of eligibility was seen, and child details below (all fields MUST be filled in)

Reference No. \*

Child's Forename \*

Child's Surname \*

Child's Date Of Birth \*  

Proof Seen \*  

[Check Eligibility](#) [Reset](#)

Press 'Check eligibility'

You will then receive the result

✓ Ref: ' ' - Found and Eligible

You are then able to add the child to the Live register – remember you can only save the details onto the Live register if the start date is today or in the past.

[Add to Live Register](#)

If the child's start date is in the future, then please go back to your Live register, at the top of the page you will see a button that says 'future starters'. Click on this button.


[Future Starters \(0\)](#) [Add Child](#)


Then click on 'Add Future Starter'.

[Add Future Starter](#)

Please note if you are a school or an Academy you will not have the option of a future start and you will have to wait until the start date of the child arrives based on the data you have in your MIS.


Please refer to our guidance notes on Maintaining your Live Register for further guidance on adding and updating the child's details.

 [03 Establishment Portal\\_Maintaining your 'Live register' for PVI & Childminders](#)

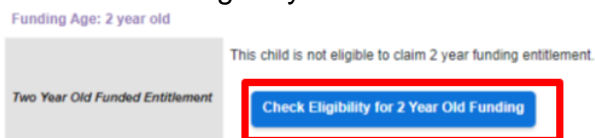
 [04 Establishment Portal\\_Maintaining your 'Live register' for Schools and Academies](#)



2. If the child is currently on your future starter list or your live register:

Go to Early years- Live register. Find the child and click on the edit button on the right-hand side of the child's row 

Scroll down to 'Funding eligibility checks.'  
Press 'Check Eligibility for 2-Year-Old Funding '



Add in the reference number and select when you have seen proof and press ok.


Two Year Old Application Details

Please select from the following options:

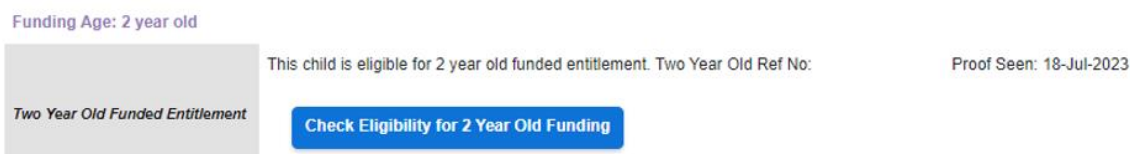
Does the Parent / Guardian have a 2 Year Old Application Reference Number from Oxfordshire County Council?  Yes  No

Enter the reference number and date that proof of eligibility was seen below (all fields MUST be filled in).

Reference No.

Proof Seen  

You will now see a message that should tell you the child is eligible



This then opens the attendance section for you to add the hours.

Attendance Details

Provider Delivery Method: Term Time Only

Universal Entitlement From: 01-09-2024

Days Per Week: 2

Additional Hours: 0.0

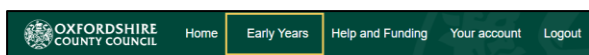
**2 Year Old Funded Entitlement: 13.0**

Working Parent Entitlement: 0.0

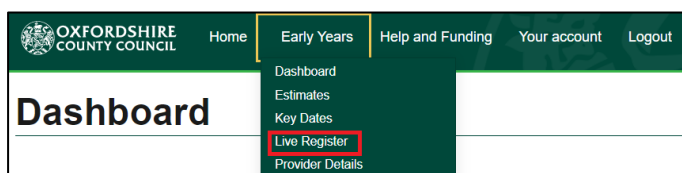
If you receive error message, please do double check the name of the child and the reference number is correct. Please do contact The Early Education Funding Team if you require us to check the details of the code. This could be middle names or double-barrelled surnames.

## 4 Schools / Academies

- Once you have logged into your Establishment Portal account, you will be taken to the Dashboard for your setting.
- Click on the Early Years drop-down menu from the main menu bar at the top of the screen.




- Select Live register from the drop-down list of options.



Here you will see a list of all your currently funded children. Please note all children must have a start date of today or in the past to be included.

The children will be automatically transferred from your school MIS providing you have a URN, Address, and correct year group (needs to be a format of N1 or N2). If for any reason the children are not showing, please contact The Early Education Funding team. Please note it can take up to 72 hours for the children to show once you have added them to your MIS.

If a child's start date has not yet arrived and you wish to complete a check, please click [here](#) , otherwise continue to follow these guidance notes:

 04 Establishment Portal\_Maintaining your 'Live register' for Schools and Academies

## 5 Schools / Academies – Childs start date not arrived yet and you wish to complete a quick check of eligibility?

Please note you will be required to re add the codes and parent details again before a headcount once the child's start date has arrived and the child appears on the live register.

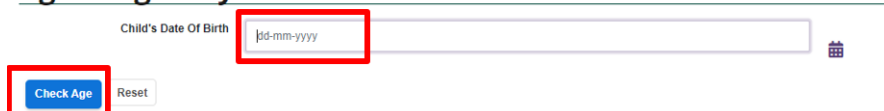
Go to Early Years – Dashboard

Select Age/ eligibility Checks – only click ‘2-year-old application’ button if you are a school that takes 2-year-olds on specific benefits, and you wish to complete an assisted application on behalf of the parent. Click [here](#) are guidance to this. Otherwise continue:



Enter the child’s DOB and press check age.

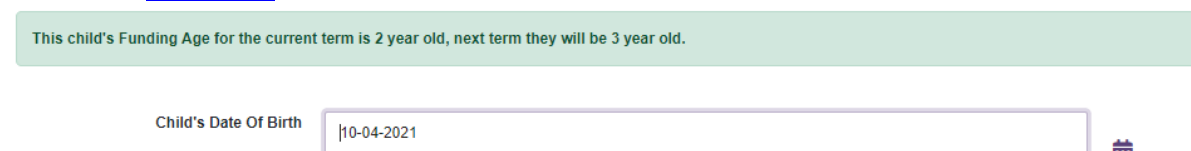
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 Working Parent Eligibility Check

Child's Date Of Birth \*  

Parent/Guardian's NI number \*

Eligibility code \*

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 No

**Check Eligibility**

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6.

✘ Service failed: Eligibility code invalid

This error message is likely to mean there is a space within the code or NI number field- please check and try again.

Please now follow guidance on 'How to maintain your Live register and Headcount