

**EARLY YEARS**

**Oxfordshire**

**Establishment Portal –**

**Maintaining your ‘Live**

**register’**

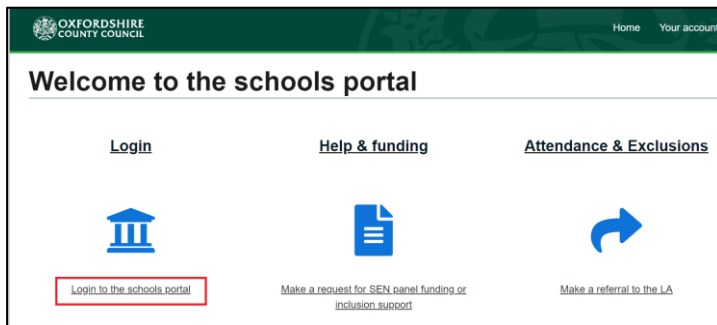
**for Schools & Academies**

## Table of Contents

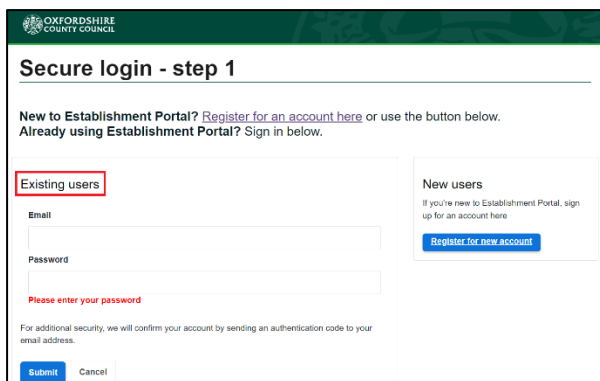
.....	1
1. Establishment Portal Signing in.....	3
2. Reviewing Dashboard.....	5
3 Edit Funding Details .....	6
3.1 Parent / Guardian Details.....	7
3.2 Funding Eligibility Checks – 2YO & Working parent Hours.....	8
3.3 Attendance Details.....	10
3.4 Early Years Pupil Premium - EYPP (for all ages).....	11
3.5 SEN Inclusion Funding .....	13
3.6 Disability Access Funding .....	14
3.7 Categories .....	14

# 1. Establishment Portal Signing in

Once on the logon page – select Login to school’s portal link

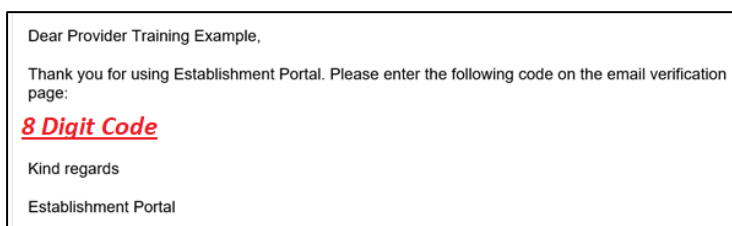


From the Secure login – step1 screen under Existing users - Enter your registered email and password and Click **Submit**



The portal will send a verification code to the email supplied to confirm the email is valid. If you can't find this email, it may be in your spam/junk email folder. If you can't find this email, please check your spam/junk email folder. If you have not received the email containing the code, use the [Please send me a new code](#) to get the code sent again. It might also be worth clicking on cancel to return to Step 1 and check the email supplied is correct and repeat the steps. Access the email to copy the code sent and paste/type it into the box below.

Here is a sample email that will be received with the 8 digits code.



Enter the code from the email and click on Finish.

## Secure login - step 2

We have just sent you an email to confirm your account. Please enter the code this contains below.

If you can't find this email, it may be in your spam/junk email folder.

Code

**Finish**

Cancel

[Please send me a new code](#)

Please enter the verification code that we sent you.

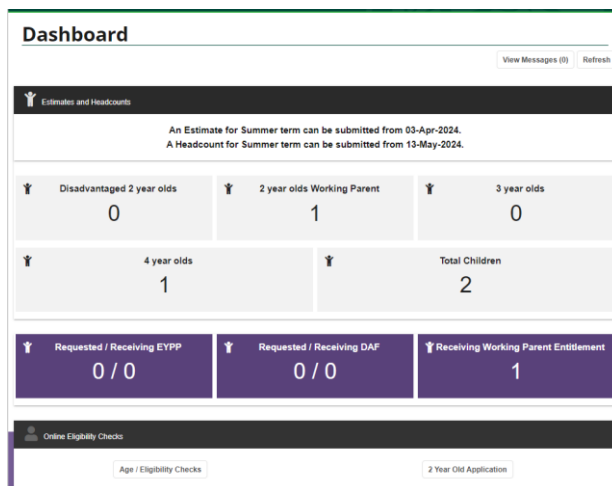
## 2. Reviewing Dashboard

Once you have logged into your Establishment Portal account, you will see the Dashboard for your setting. If this is not visible, please contact the Early Education Funding Team to review your account.

The Dashboard shows:

- if a message is available- These expire after 2 weeks.
- information about submissions past and future
- a summary of the ages and number of children on your Live Register
- online eligibility check buttons for a quick check outside of the Live Register
- Please note from April 2024 if you are checking a 2-year-old working parent code then press [Age / Eligibility Checks](#) . If you are wanting to complete an assisted application for a parent who is claiming specific benefits, then click

[2 Year Old Application](#)



Before starting the Headcount Submission wizard, please review the Dashboard and the Live Register.

The Live Register:

- is a record of government funded children that are *currently* attending. It appears as a list of children
- has child data migrated overnight on to it from your school MIS system
- should be checked regularly and kept up to date so only children currently attending appear on it
- **is separate from the headcount submission – essentially this is your register**
- is the basis for what appears on the headcount submission

As a school or academy, your Live Register will be populated from your management Information system (MIS). This may be Integris / Arbour or similar. You will therefore need to make sure your school system is up to date before the headcount with child's details, address, UPN and nursery year group. Below is a crib sheet of the DOB ranges


which provides you a breakdown of which NCY to choose in your system. This crib sheet will be updated annually.

	NCY	Oldest DOB	Youngest DOB	Age @ yr start as age during at 1st Sept year		
Pre-School	E1 -4 on *LA	01/09/2022	31/08/2023	0	1	Pre-School
	E2 -3 on *LA	01/09/2021	31/08/2022	1	2	
Foundation Stage	F3 (N1) -2 on *LA	01/09/2020	31/08/2021	2	3	Foundation Stage
	F2 (N2) -1 on *LA	01/09/2019	31/08/2020	3	4	
	F1 (R) 0 on *LA	01/09/2018	31/08/2019	4	5	
KS1	1	01/09/2017	31/08/2018	5	6	KS1
	2	01/09/2016	31/08/2017	6	7	

Once these changes are made in your school system, please wait 24 hours before they migrate onto your Live Register on the Establishment portal. Please note, OCC must complete a manual matching task for students that are already known to us if there is a data conflict such as change in DOB, so this may take longer to process. Please do email [earlyeducation@oxfordshire.gov.uk](mailto:earlyeducation@oxfordshire.gov.uk) if you find the child/ren do not appear after 48 hours. Please do not leave it until the week of the headcount to do this. We advise checking the Live register at the beginning of each term.

If you change over MIS or are due to then we ask you to let us know about this prior to the start of a new term. This is because it will require a new set up to make sure the data comes through. When the child is on the Live Register, you will then need to add funding detail, such as Universal hours, Extended Hours (30 hours), EYPP, DAF and, if applicable, 2-year-old funding. **Please note hours will NOT populate from your school's system, it is just the basic demographics of the children that is transferred, all hours will need to be reviewed and amended if necessary.**

**Working parent entitlement:** Make sure the guardian details are added in the child's

details area of the 'Live register' and then click . Refer to our termly working parent entitlement checks Guidance here [Forms and guidance notes | Oxfordshire County Council](#) for more information on dates that will be eligible for each Term.

Parent / Guardian Details

This should only be the parent/guardian(s) living in the household of the child as declared to HMRC and may not necessarily be the child's biological parent.

Working Parent Entitlement

Check Eligibility for Working Parent Entitlement

Name
DOB
Contact No.
NI No.
NAAS No.
30 Hour Code
Consent to EYPP check

### 3 Edit Funding Details




Edit Funding Details

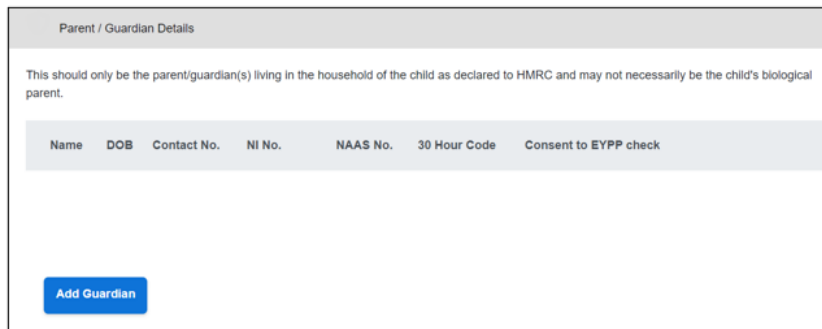
Edit Child Details

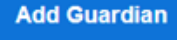


This section is made up of 6 parts:

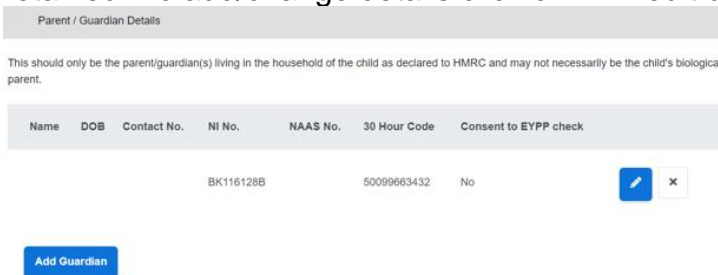
- Parent / Guardian Details
- Funding Eligibility Checks
- Attendance Details


### 3.1 Parent / Guardian Details

- Click into the child's row on the Live Register or click the pencil symbol  on the right-hand side of the child's row. You must add these if you would like to claim EYPP or working parent entitlement. This detail does not populate from your MIS.
- This section will allow you add or change details of the Parent/Guardian.



- Click  to enter Parent/Guardian Details on the screen that follows. Enter all the details as appropriate and click on OK  to save the detail. You can also consent to EYPP check here, add NI number and working parent entitlement code as necessary.
- Please note any details entered as part of any Eligibility check will be retained. To add/change details click on  edit button.



- If the details are not correct edit or use  to remove altogether.

- All guardians added will be listed in this section.

Name	DOB	Contact No.	NI No.	NAAS No.	30 Hour Code	Consent to EYPP check
			BK116128B		50099663432	No
Parent2 Training Example	01-Jan-1990		AB112233C			Yes

### 3.2 Funding Eligibility Checks – 2YO & Working parent Hours

- Depending on the age of the child this section will allow you to complete one of 2 funding checks. You will only see the relevant checks for the relevant age dependant on the DOB you have entered.
1. 2-Year-Old Funded entitlement refers to 2 Year Olds whose families might be in receipt of specific benefits or for other non-economic reasons. [Click here for criteria](#)
  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](#)
    - Click on the relevant check for that family. Where a child is 2, from April 2024 there are 2 sets of criteria (as mentioned above). We advise all providers to offer the first criteria below as once applied for and found eligible there will be no reconfirmation needed by the parents. You cannot claim 15 hours for each entitlement for 2-year-olds.



Funding Eligibility Checks

Two Year Old Funded Entitlement

Working Parent Entitlement

○

Funding Age: 2 year old

This child is not eligible to claim 2 year funding entitlement.

Two Year Old Funded Entitlement

○ Clicking on information box:

will open the following

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

Select a guardian to carry out the 2 year old funding check below

Do not carry out an eligibility check unless you hold a signed mandate from the parent / guardian(s) consenting to their details being verified with records held by the Department for Work and Pensions (DWP), Her Majesty's Revenue and Customs (HMRC) and the Home Office.

Check for '2 Year Old Funding' Eligibility  Yes  No

- If the parent has already applied and given you a code in the following format XX-XXXX-XXXX then press yes to the first question.
- You will then be asked to input the code you have already been given by the parent. Remember this needs to be in format XX-XXXX-XXXX. The code and name of child you have added to the live register must match the original applications – including First and Middles names. Please do check with the funding team if you receive a false result as it could be a difference in the name of the application.

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

- If the parent has not given you a code, then you will need to run a check for the first time. To do this click no to the first question. You must make sure you have added a parent in the parent / carer details area. The check will be looking at the parents DOB, Parents NI number and the first 3 letters of the parents' surname. If it is a match and the parents are eligible you will be able to add 15 hours into the attendance details below.

**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

Select a guardian to carry out the 2 year old funding check below

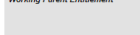
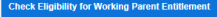
Do not carry out an eligibility check unless you hold a signed mandate from the parent / guardian(s) consenting to their details being verified with records held by the Department for Work and Pensions (DWP), Her Majesty's Revenue and Customs (HMRC) and the Home Office.

Check for 2 Year Old Funding Eligibility  Yes  No


Parent/Guardian\*

ECS check result: Not found

Ok Close

- Clicking on   will allow you to check eligibility for any working parent family (see the criteria above)
- You should have already added the parent details to the parent and guardian details. If you haven't, please add these as you will not be able to perform a check without these being added. This information should have been added to the parental declaration form you have asked the parent to sign. The check will be trying to match an eligible result based on the parents NI number, the working parent 11-digit code and the child's DOB.
- To note a 3&4Year old that only wishes to claim 15 universal hours will not need to have an eligibility check ran.
- Any problems you occur please do email The Early Education Funded team. We will not be able to add the claim on for you, but we will be able to help you navigate through any problems you are having if you contact us within plenty of time before a headcount deadline.

### 3.3 Attendance Details

- This section allows you to complete the attendance details for the child attending your setting.
- Enter all the details as appropriate.
- **Note:** There are separate fields to claim Government Funded Hours and Additional Hours which are privately funded hours the child has with you.
- Click on  to reveal help-text
- Delivery Method is fixed at TTO – Term Time Only
- Please take care when completing the hours, these are required as a weekly total in relevant field  
**e.g., if child is attending for 45 hours per week, then  
 Additional Hours = 15 privately paid for hours  
 Universal Hours Claimed = 15.0 and  
 Extended Hours Claimed = 15.0**

Attendance Details	
Provider Delivery Method	Term Time Only
Days Per Week *	5
Additional Hours	15
Universal Entitlement	15.0
Working Parent Entitlement	15.0

### 3.4 Early Years Pupil Premium - EYPP (for all ages)

- This section will allow you to perform an EYPP check on the Parent/Guardian where applicable.
- If a Parent/Guardian is already linked and has consented to the EYPP check – you will see the button to Perform a Check as below.
- Please note you must hold a signed Parent Declaration form to do this.

Early Years Pupil Premium

If "Yes" is selected below then an Early Years Pupil Premium receipt will be requested for this child when they are 3/4 years old. This check will be performed automatically when you submit your next Headcount. If the child is not yet old enough, you can still add the information now and it will be stored here until the first term after their 3rd birthday.

Do not carry out an eligibility check unless you hold a signed Parent declaration form [https://www.oxfordshire.gov.uk/business/information-providers/childrens-services/providers/support-early-years-providers/business-and-funding/nhs-care-providers/early-education-fund/forms-and-guidance/notes-from-the-parent-guardian\(s\)-consenting-to-their-details-being-verified-with-records-held-by-the-department-for-work-and-pensions-dwp,-her-majestys-revenue-and-customs-hmrc-and-the-home-office](https://www.oxfordshire.gov.uk/business/information-providers/childrens-services/providers/support-early-years-providers/business-and-funding/nhs-care-providers/early-education-fund/forms-and-guidance/notes-from-the-parent-guardian(s)-consenting-to-their-details-being-verified-with-records-held-by-the-department-for-work-and-pensions-dwp,-her-majestys-revenue-and-customs-hmrc-and-the-home-office).

Check for EYPP eligibility  Yes  No

Consenting Parent/Guardian(s).

Parent2 Training Example (DOB: 01-Jan-1990) - AB112233C


Parent1 Training Example (DOB: 01-Jan-1986) - BK116128B

Perform EYPP Check

- If a parent/guardian is linked but the EYPP consent is not recorded – you might have a message as below.

Check for EYPP eligibility  Yes  No

No consenting parent/guardian(s) recorded

- You can correct this by updating consent where this was granted but not recorded. To do this navigate to the Parent / Guardian Details section and click on the pencil symbol  button.
- This will allow you to update the details on the pop-up screen that follows. Place a tick to record Consent to EYPP check as below and click OK

Parent/Guardian Details

Forename \* Parent

Surname \* Training Example

Contact Number

Date Of Birth dd/mm/yyyy

NI Number \* SG532774G

NASS Number \*

Consent to EYPP check

30 hour code 5005965431

OK

- This will also update the EYPP section and the Perform Check button should become available.

Early Years Pupil Premium

If 'Yes' is selected below then an Early Years Pupil Premium receipt will be requested for this child when they are 3/4 years old. This check will be performed automatically when you submit your next Headcount. If the child is not yet old enough, you can still add the information now and it will be stored here until the first term after their 3rd birthday.

Do not carry out an eligibility check unless you hold a signed Parent declaration form <https://www.oxfordshire.gov.uk/business/information-providers/childrens-services-providers/support-early-years-providers/business-and-funding-childcare-providers/early-education-fund/forms-and-guidance-notes> from the parent/guardian(s) consenting to their details being verified with records held by the Department for Work and Pensions (DWP), Her Majesty's Revenue and Customs (HMRC) and the Home Office.

**Check for EYPP eligibility**     Yes  
 No

Consenting Parent/Guardian(s).

Parent2 Training Example (DOB: 01-Jan-1990) - AB112233C

[Perform ECS Check](#)

Clicking on the Perform Check button will perform the EYPP check and show you the result of the check. This is a reminder that this will only run an economic check. If you have a child that is eligible via the non-economic route, please upload documentation and send an email to The Early Education Funding Team to notify us you have done this.

- If they are eligible the following message will be displayed

**Found and eligible - Check Date - 04-Mar-2021**

- If the check fails, you may see one of the below messages

**Failed to perform check. Please try again later. - Check Date - 22-Jul-2022**

**OR**

**Not found - Check Date - 04-Mar-2021**

- You can review the details recorded and update if appropriate to run the check again.

**EYPP:** This is only an economic EYPP check. Make sure the guardian details are completed and then click 'Yes' against 'Check for EYPP eligibility' if you have been given parent/guardian consent.

Parent / Guardian Details

This should only be the parent/guardian(s) living in the household of the child as declared to HMRC and may not necessarily be the child's biological parent.

Name	DOB	Contact No.	NI No.	NAAS No.	30 Hour Code	Consent to EYPP check
Early Years Pupil Premium						

If 'Yes' is selected below then an Early Years Pupil Premium receipt will be requested for this child when they are 3/4 years old. This check will be performed automatically when you submit your next Headcount. If the child is not yet old enough, you can still add the information now and it will be stored here until the first term after their 3rd birthday.  
Do not carry out an eligibility check unless you hold a signed Parent declaration form [here](#) from the parent/guardian(s) consenting to their details being verified with records held by the Department for Work and Pensions (DWP), Her Majesty's Revenue and Customs (HMRC) and the Home Office.


Check for EYPP eligibility  Yes  No

No consenting parent/guardian(s) recorded


You will see the result straight away.

For a non-economic EYPP check refer to [Early Years Pupil Premium | Oxfordshire County Council](#). Please send an email to [earlyeducation@oxfordshire.gov.uk](mailto:earlyeducation@oxfordshire.gov.uk) with supporting evidence if you have a non-economic EYPP claim.

When reviewing your dashboard for EYPP you will see it refers to requested / receiving. The total requested (below shows 9) means that is the number of children you requested a check for EYPP from. The total receiving (below shows 6) are who is eligible for EYPP.

 Requested/Receiving EYPP

**9 / 6**


When you click on that box it will take you to a list of all those children – this list includes the ones that have been checked and are not receiving EYPP. To identify the 6 that are receiving EYPP this shows with  symbol.


### 3.5 SEN Inclusion Funding

If you wish to claim this funding for a child, you must indicate with a 'K' in your school system. You must also make sure you add a primary need and a start date of the need. This data should then (after an overnight refresh) populate in the portal as below.

SEN

SEN \* SEN Support

Start Date \* dd-mm-yyyy 

End Date dd-mm-yyyy 

Primary Need \*

Secondary Need

You should also see the start date. When the child no longer attracts the 'K' you should add an end date in your school system.

If for any reason this information does not pull through into the portal, please notify us as soon as possible by sending an email to the Early Education Funding team

[EarlyEducation@oxfordshire.gov.uk](mailto:EarlyEducation@oxfordshire.gov.uk). If you include name of children, then please use Egress.

Please note once a child moves to RAF (Request for Additional Funding) you must notify us as we cannot double fund this. Please add your end date in your school MIS.

### 3.6 Disability Access Funding

- **From April 2024 – can be claimed for children of all current funded ages.**
- This section allows you to record Disability Access Funding claim details for the child.

DAF (Disability Access Funding)

DAF (Disability Access Funding)  Yes  
 No

DLA Letter Seen \*

Supporting Information

Upload any documents here which you wish to be considered with this DAF request (e.g. DLA Award Letter, Parental Agreement).

I agree all of the above DAF information is correct \*

- This is a mandatory question and defaults to No.
- If you wish to apply for DAF select Yes.
- You need to enter the date the current DLA Letter was seen. Please note you must see a letter that covers the date of the current term the child is in – we cannot approve any DAF claims where DLA has expired. Parents can be asked to provide the most up to date letter and if they have misplaced this then they can ask The Department of Working Pensions to supply them with a new letter.
- DAF is paid on a yearly basis and can only be used at 1 setting. It cannot be transferred. A new application must be made each year. So, if a child has it for the first time in spring 2024, you should apply again for it in spring 2025.

### 3.7 Categories

- This is an optional section for providers to use. It may be useful to record the class a child is in.
- Use this section to add tags / categories to this child which can then be used to filter on in the Live Register. This is not a requirement – this is optional.

Categories

Use this section to add tags / categories to this child which can then be used to filter on in the Live Register

Add a category

Categories

For e.g., for this child if I add category as 2-Year-Old EYPP the portal will add this as a category to list of filters on the Live Register that you can use this

find this child. Please note you can leave this blank as there are pre-set filters available within the portal.

Categories

Use this section to add tags / categories to this child which can then be used to filter on in the Live Register.

Add a category

2 Year Old EYPP

+ Add

Categories

2 Year Olds 2 Year Olds (Disadvantaged) Funded Hours Pupil Premium + Add

Categories

2 Year Old EYPP x

All the above should be completed at the very beginning of term as it will be the basis of the headcount data. Once you have completed this please refer to guidance notes 'How to submit a Headcount for Schools and academies.'