

Leavers, Late Starters and Funding Amendments

The checklist below may assist you with the process for Leavers, Late Starters and Funding Amendments. For detailed help in processing your portal submission, please refer to Section 5 of the How to Guide

Leavers		
Action	Completed (please tick):	Date:
If a parent advises you that they want to leave mid-term you should do the following:		
<ul style="list-style-type: none"> Ascertain the reason for leaving 	<input type="checkbox"/>	
<ul style="list-style-type: none"> If the reason does not match one of the permitted exceptions, advise the parent that funding will not be transferred to the new setting until the start of the next term 	<input type="checkbox"/>	
<ul style="list-style-type: none"> Notify the Funding Team within 5 working days via the Provider Portal either via Funding Actuals amending the funding end date and weeks or by submitting via the Adjustments section 	<input type="checkbox"/>	

Late Starters		
If you are considering a request for a child moving to your setting mid-term, you should do the following:		
<ul style="list-style-type: none"> Determine if the child is moving from another provider 	<input type="checkbox"/>	
<ul style="list-style-type: none"> Ascertain the reason for leaving the other provider 	<input type="checkbox"/>	
<ul style="list-style-type: none"> If the reason does not match one of the permitted exceptions, advise the parent that funding will not commence until the start of the next term 	<input type="checkbox"/>	
<ul style="list-style-type: none"> If the reason matches a permitted exception, notify the Funding Team within 5 working days via the Provider Portal either whilst the Funding Actuals is open or submit via the Adjustments section. Ensure the reason is recorded in the Notes section of the child funding record 	<input type="checkbox"/>	

Funding Amendments		
If a parent requests an increase or decrease in their child's funded hours:		
<ul style="list-style-type: none"> Notify the Funding Team within 5 working days via the Adjustments Section of the Provider Portal. Whilst the Funding Actuals is open use the 'Send Email' button. When Funding Actuals are closed use the Adjustments section to amend the hours in the child's record 	<input type="checkbox"/>	