Early Tree

EARLY TREE SUPPORT · GUIDE

# Funding

## Entitlements, agreements and the headcount

EARLY TREE VERSION
2026.11

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FOR
Managers, owners and administrators

ONLINE
help.earlytree.co.uk

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Screenshots show a fictional nursery and people.

# Contents

Funding: entitlements, agreements and the headcount. These steps match Early Tree 2026.11; for another version, see help.earlytree.co.uk.


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**Reading the screenshots.** The orange numbers 1 on a picture match the numbers in the step text, and an orange box marks the part of the screen a step is about. Every guide is also online, with search, at help.earlytree.co.uk.

FUNDING

# Funding

WHO IT'S FOR

Manager Owner Administrator

WHERE TO FIND IT

**Funding**

Early Tree records each child's government-funded entitlement for each term, the parent's signed agreement (their parental declaration), and produces the headcount return for your local authority. Funded hours are booked as funded sessions and appear on invoices at £0.00.

## Guides in this area

| Guide | When |
| --- | --- |
| Funding entitlements and agreements | Each term: entitlements, codes, agreements and the headcount |

FUNDING

# Funding: entitlements and agreements

| WHO IT'S FOR | WHERE TO FIND IT | TIME | YOU NEED |
|---|---|---|---|
| Manager · Owner · Administrator | **Children & Families** › **the child** › **Bookings & funding** | A few minutes per child each term | Permission to manage funding; the headcount also needs access to children's documents |

## Purpose

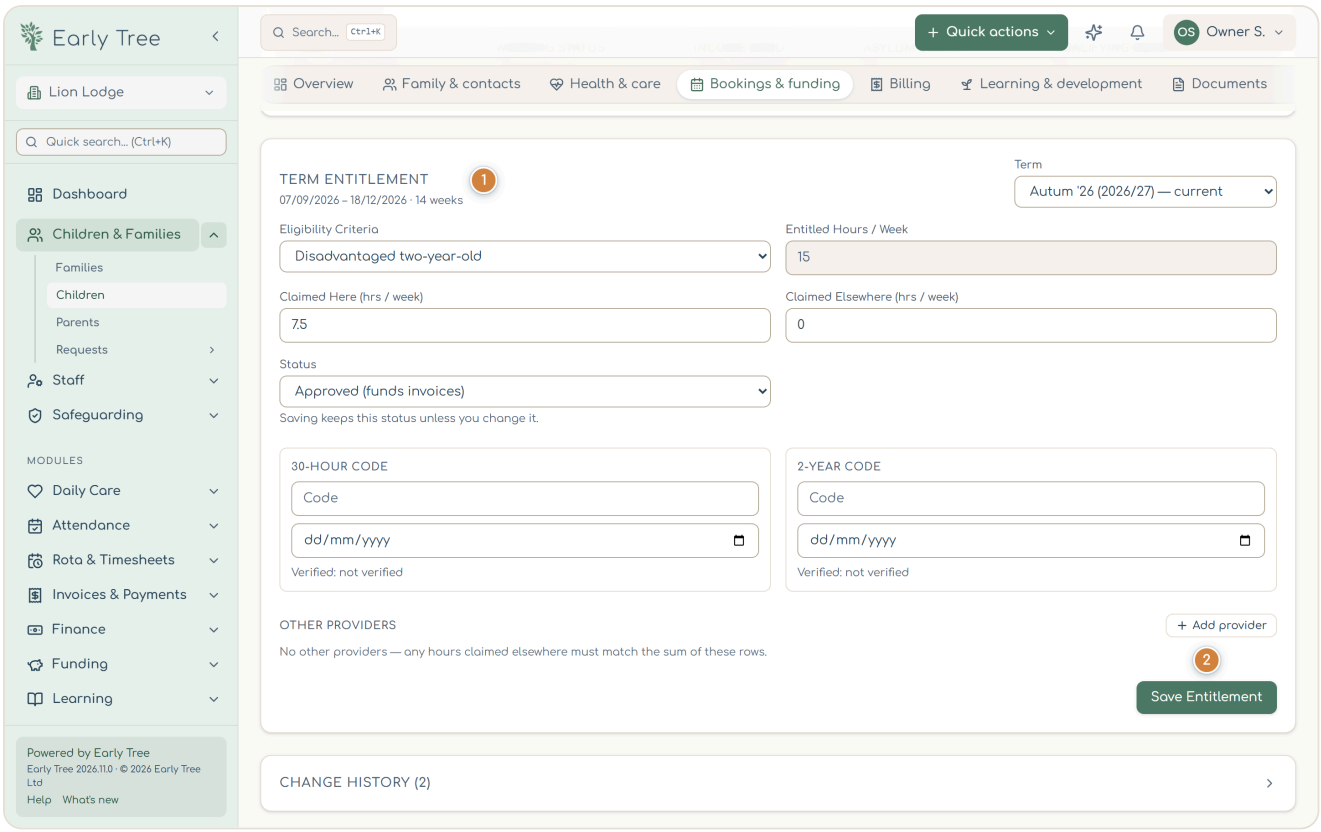
Record what each child is entitled to each term, get the parent's signed agreement, and send your local authority an accurate headcount.

## Before you start

- Have the parent's eligibility code (for working-parent entitlements) and its expiry date. Early Tree doesn't check codes with HMRC: check them in your local authority's eligibility checker as usual.
- Your term dates are set up.

## Record a child's entitlement

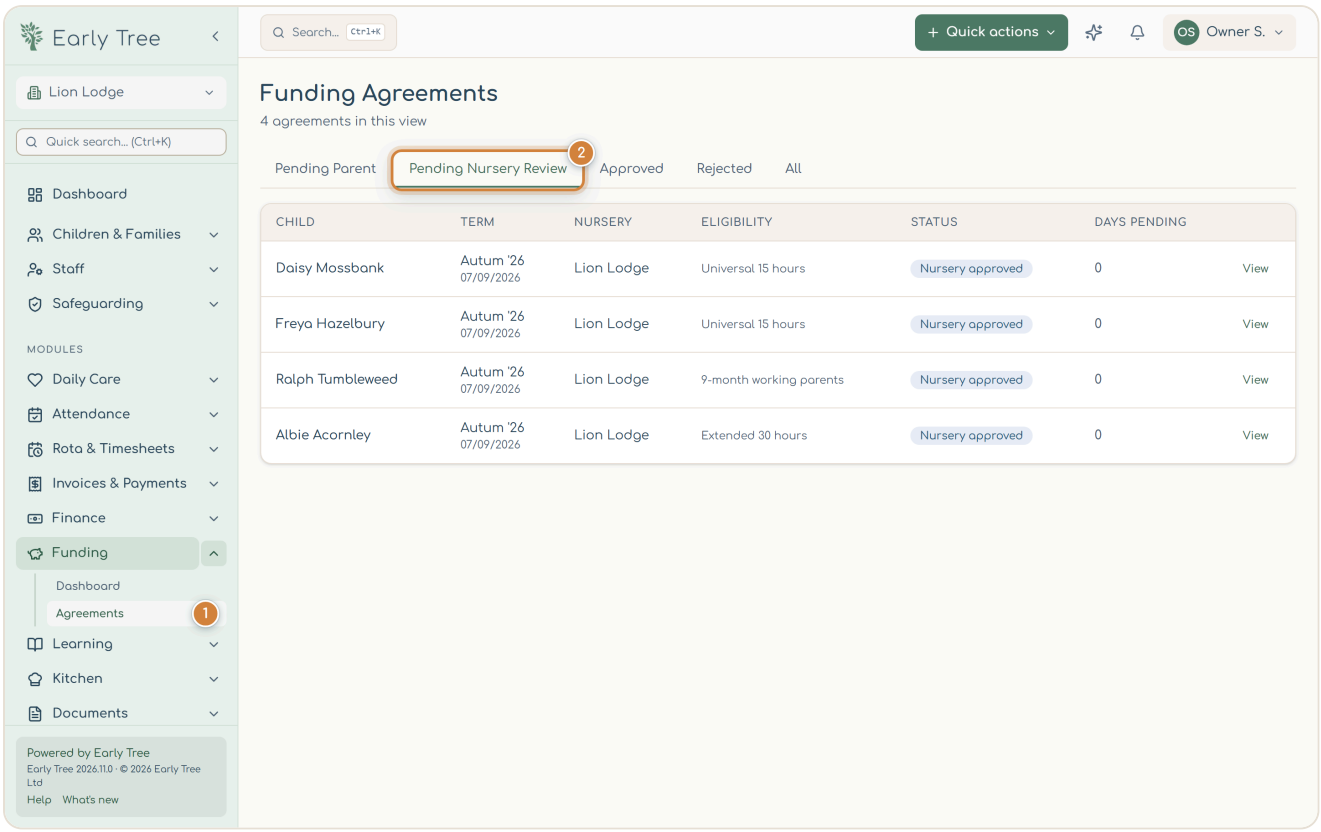
1. Open the child's record, the **Bookings & funding** tab, and find **Term Entitlement** 1. Choose the term at the top right.
2. Choose the **Eligibility Criteria** (for example **Universal 15 hours** or **Extended 30 hours (working parents)**). **Entitled Hours / Week** fills in.
3. Enter the hours **Claimed Here** and **Claimed Elsewhere** (for a child who splits their hours with another provider, add the provider under **Other Providers**).
4. Enter the **30-Hour Code** or **2-Year Code** and its date.
5. Select **Save Entitlement** 2.




A child's funding entitlement for the term.

## Funding agreements

1. On the child's **Funding Agreements** tab, select **New agreement**, choose the nursery and term, and **Create draft**.
2. Open it and select **Send to parent**. The parent signs it in the parent portal.
3. Signed agreements wait in **Funding › Agreements** 1 under **Pending Nursery Review** 2. Open one, check it, and select **Approve & counter-sign**, then sign. **Request changes** sends it back with a reason. **Pending Parent** lists those still waiting for the parent.




Funding agreements.

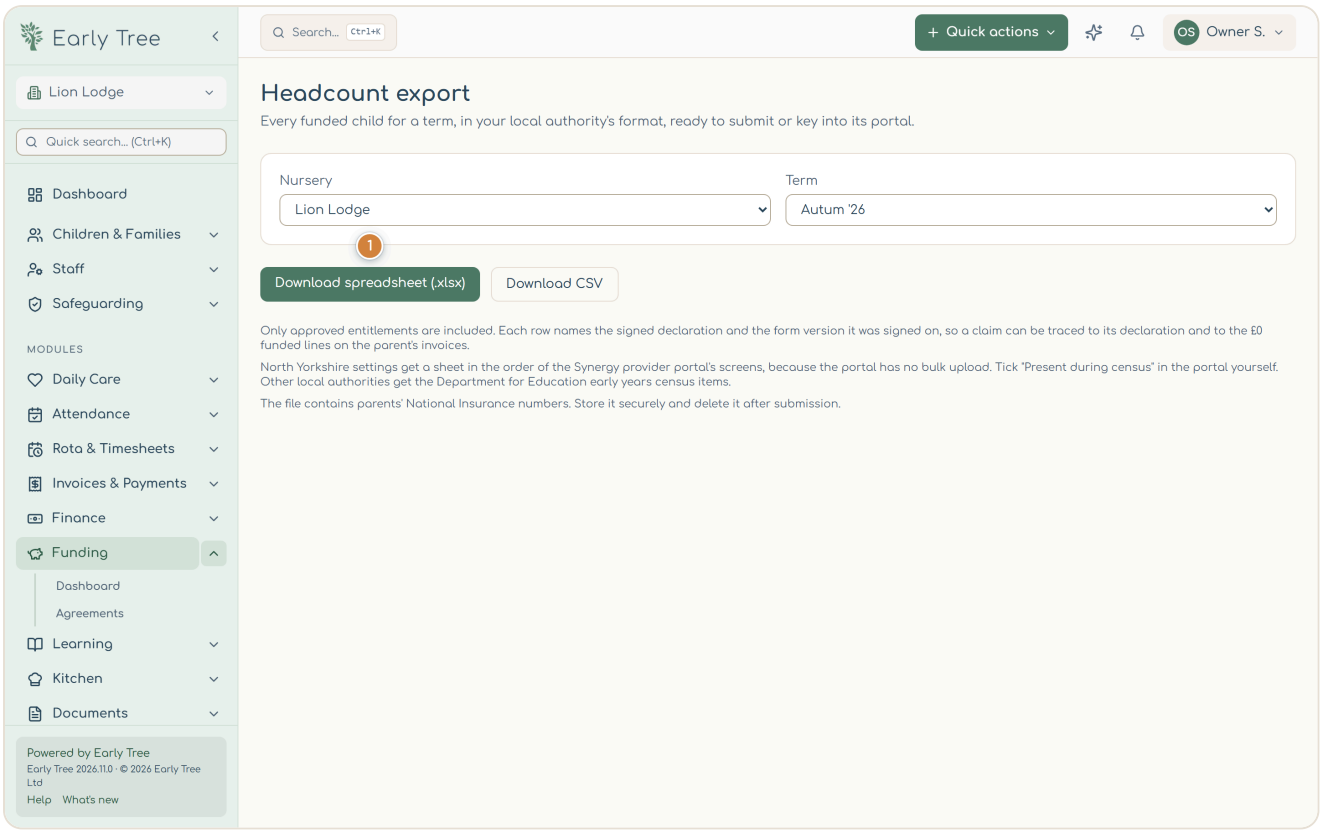
APPROVING

Selecting **Approve & counter-sign** approves the agreement straight away, before you sign. If you close the signature window with **Later**, the agreement stays approved but not counter-signed. Come back and sign it.

Where your local authority has no Early Tree template yet, the agreement uses the generic form based on the DfE model parental declaration. Check your local authority accepts it.

## The headcount

1. Open **Funding** and select the **Headcount export** card.
2. Choose the nursery and term, and select **Download spreadsheet (.xlsx)** 1 or **Download CSV**.




Headcount export for your local authority.

The file includes approved entitlements only, in your local authority's format where Early Tree has it, otherwise the Department for Education's early years census items. It contains parents' National Insurance numbers: keep it secure, and send it only through your local authority's secure route.

## Common problems

**"A signed funding agreement covers this term".**
Changing the entitlement would contradict what the parent signed. If you must, select **Override and save** and give a reason, then send the parent a new declaration.

**A child is missing from the headcount.**
Only approved entitlements are included. Check the child's entitlement status for that term.

## Related guides

- Sessions and booking patterns
- Monthly invoices and payments