Department for Education

Section 251 financial data collection 2015 to 2016

COLLECT guide for local authorities

February 2015

Contents

Introduction

Local authorities (LAs) are required under Section 251 of the Apprenticeships, Skills, Children and Learning Act 2009 to prepare and submit an education and children and young people's services budget statement to the Secretary of State for Education.
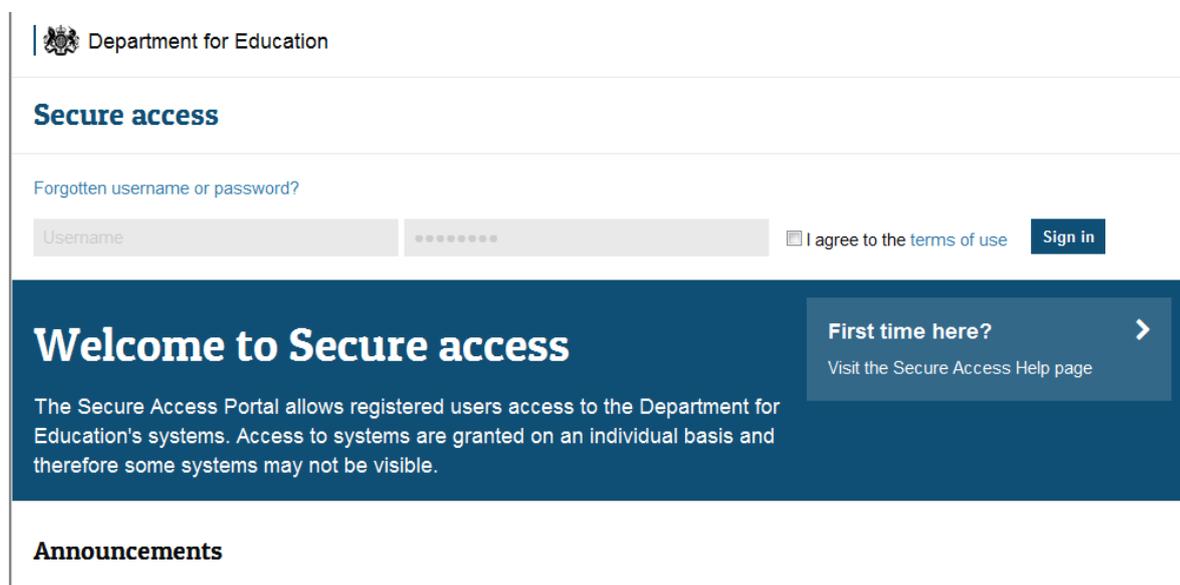
The budget statement applies to the period from 1 April 2015 to 31 March 2016 and must be submitted by 31 March 2015.

LAs must submit their budget statement using the DfE's centralised data collection and management system for education COLLECT (Collections On-Line for Learning, Education, Children and Teachers).

This advice is for LA finance officers and provides guidance for using the COLLECT system. For technical help, advice and assistance with meeting the standards and using the system, please contact the data collections helpdesk via a data collections service request form.

COLLECT and Secure Access

Access to COLLECT is through the department's Secure Access System (SA).

Please note some screen shots may refer to 2014. However the process is the same for the 2015 collection.

If you are a new user and require access to COLLECT, you will need to contact your local authority approver. Full Secure Access guidance is published online. Once successfully registered, click on the COLLECT link to access COLLECT.
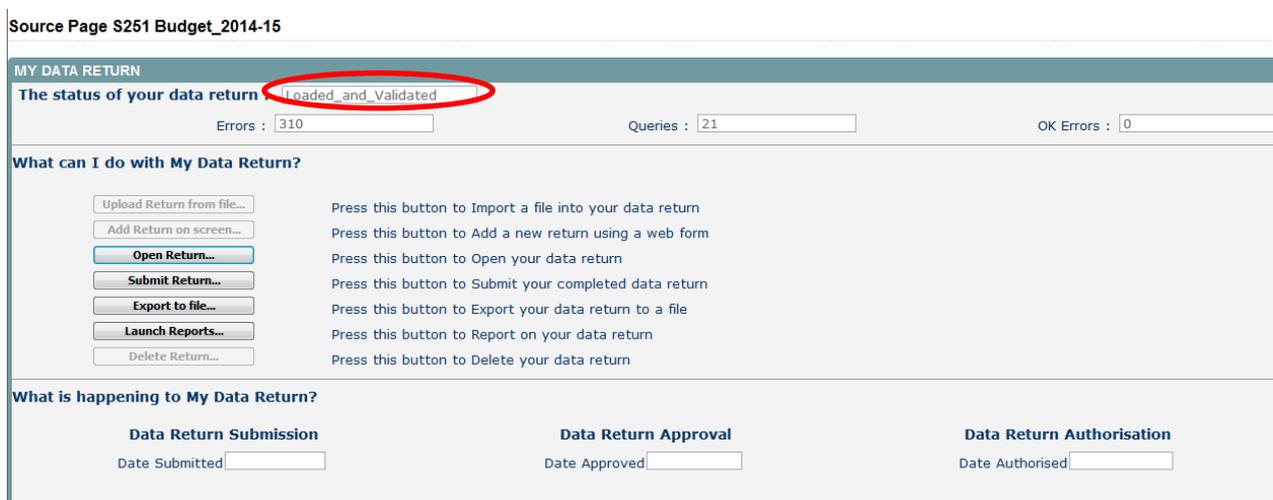
Logging in

Once successfully logged in you will be presented with the screen below. Select COLLECT. You will be taken into the COLLECT portal.
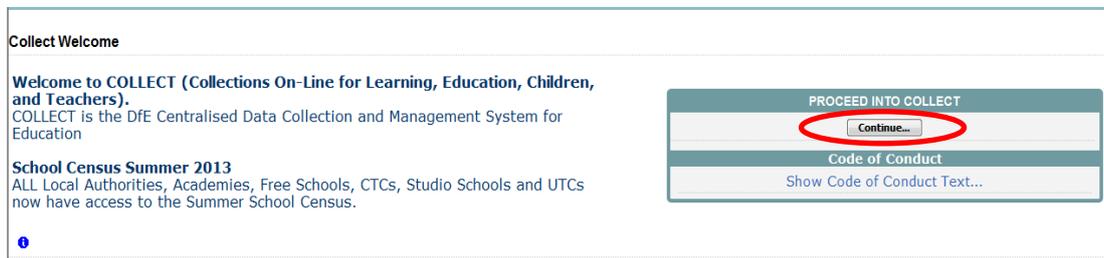
Click on Continue.Highlight 'S251 Budget 2015-16' and click on 'Select Data Collection'. This will take you to the main 'Source Page'.

LA Source page screen

On this page the options open to you will be highlighted and the status will be shown.

Status	Explanation
No Data	Data hasn't been loaded
Loaded and validated	Data loaded but not submitted
Submitted	Data loaded and submitted
Authorised	Data loaded, submitted and authorised by DfE
Amended by Source	Data amended by LA
Rejected	Data loaded but rejected due to invalid format and or contents
Amended by collector	Data amended by DfE

Source Page S251 Budget_2014-15

MY DATA RETURN

The status of your data return : Loaded_and_Validated

Errors : 310   Queries : 21   OK Errors : 0

What can I do with My Data Return?

Upload Return from file...   Press this button to Import a file into your data return
Add Return on screen...   Press this button to Add a new return using a web form
Open Return...   Press this button to Open your data return
Submit Return...   Press this button to Submit your completed data return
Export to file...   Press this button to Export your data return to a file
Launch Reports...   Press this button to Report on your data return
Delete Return...   Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted	Date Approved	Date Authorised

An explanation of the function keys are:

Function key	Explanation
Open Return	You will need to click on here to open the return (change for 15/16 return)
Submit Return	This option is greyed out until data is loaded and is used to submit the data to the DFE – this should only be done when the data is complete and clean. Control then passes to the DFE.
Export to File	This option is greyed out until data is loaded and is used to export the loaded data either as a single XML file or as a CSV file.
Launch Reports	This allows you to run the associated reports.
Delete Return	This option is greyed out until data is loaded and is used to delete the LA data from the system.

Making your return

To input data and make a return for a LA, you must click the 'Open return' button as shown above.

Viewing/ editing LA table data

Once you have completed the first screen with general contact data, you will then need to go into each section to enter your data.

To view and edit your LA table click on the each on the hyperlinked sections.

School budget lines

Each line in the top half of the screen represents school budget lines. In the example below 1.0.1 Individual Schools Budget (before Academy recoupment) is highlighted.

In order to enter the data click on 'Edit' which will activate the 'Data Value' fields in the bottom half of the screen.

Navigation to the remaining rows is via the **< >** buttons.

You are required to only enter data adjacent to the field showing errors. Any field under data value that does not show an error does not require an entry. Please leave them blank because it is either a calculated field or does not require an entry.

Once all lines have been completed you can return to the first page of your budget return by clicking on 'Drill Up'.

To continue to complete your budget LA table data click on each of the blue hyperlinked LA table sections, click on 'Edit' and enter the data values again.

School table high needs & AP settings

Click on 'Higher Needs School Table'.

School name is highlighted in the top half of the screen. Click on 'Edit' and complete 'data items' in the bottom half of the screen. **Please note that 'Estab' is an un-editable field once the school record has been created. If you require this to be changed you would need to contact DfE or delete the school and re-add it with the correct estab number.**

To remove a school from your expected list, ensure that you have the correct school highlighted in the school table grid and click on the 'Delete' button.

You will then be asked to confirm deletion, to proceed, click 'Yes', to cancel click 'No'.

By clicking 'Yes' the school will be removed from your expected list and the user will be automatically taken back to S251 Budget (first page of your budget return). To return to the higher needs school table click on the hyperlink.

Early years table line 1 – 6b – adding data

Click on 'EY Table - Lines 1- 6b' - the hyperlink on the first page of Budget Return

The next screen details lines 1 – 6b, which feeds into the early years single funding formula (EYSFF). In this screen 'Line 1. EYSFF (three and four-year-olds) base rate(s) per hour, per provider type' is highlighted.

This section requires you to 'add' data fields. You do this by clicking 'Click to view individual column descriptions'.

At this point a 'No matching EYChildRecord records found' message will appear at the top of the next screen.

Next you will need to click on the 'Add' button. **Please note that the 'Add' button will be greyed out if the left-hand grey panel is used rather than drilling down.**

This will then free up the 'data value' boxes and allow you to provide your Description, Unit Values, Unit Applied and Number of Units. Once completed click on 'Save'. If you need to make any change to this data once saved, click on the 'Edit' button.

You will need to continue this process for lines 2-6b.

Early years table lines 7 and 8 – adding data

Click on 'EY Table - Lines 7 and 8' - the hyperlink on the first page of Budget Return.
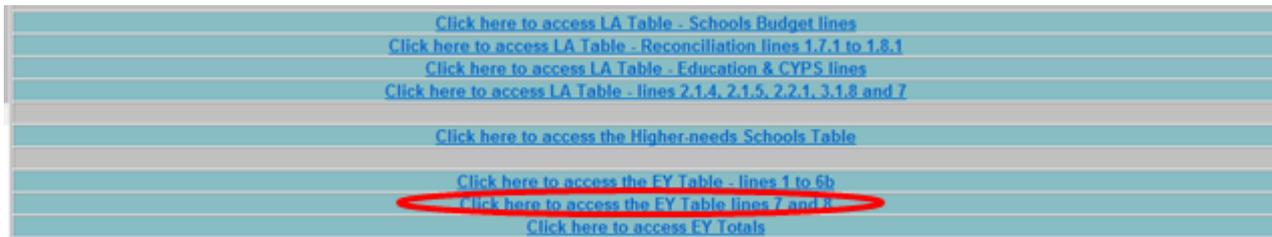
The next screen shows lines 7 and 8, which feeds into the early years single funding formula (EYSFF). Click on 'Click to view individual column descriptions'.
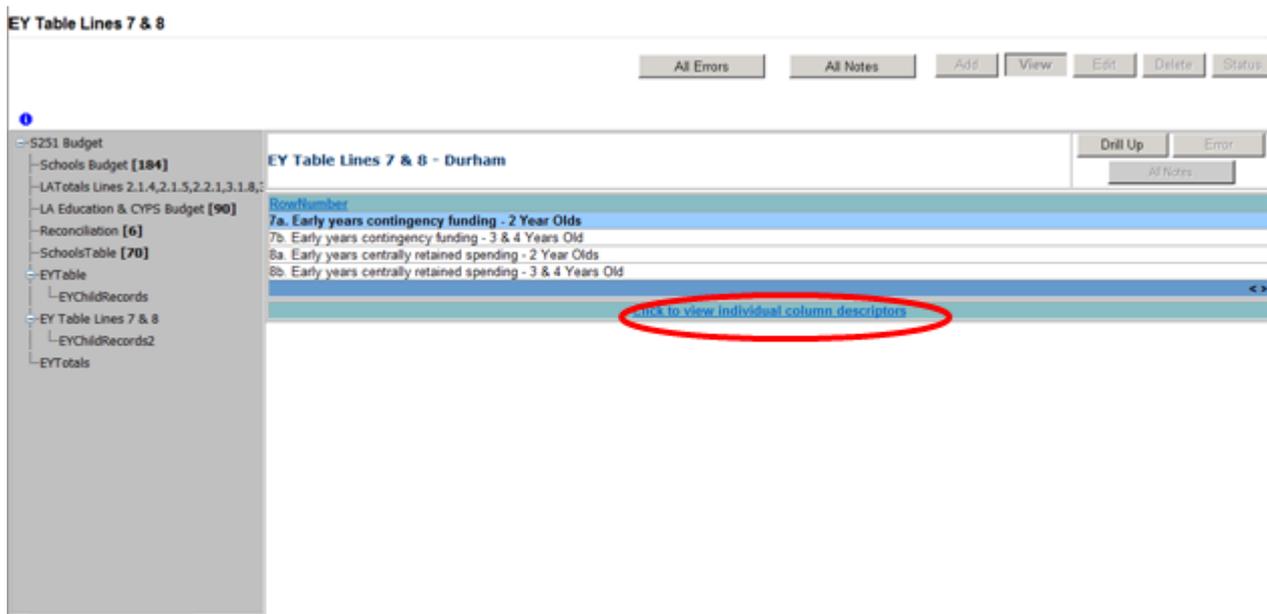
At this point a 'No matching EYChildRecord records found' message will appear at the top of the next screen and to add data you will need to click on the 'Add' button. **Please note that the 'Add' button will be greyed out if the left-hand grey panel is used rather than drilling down.**
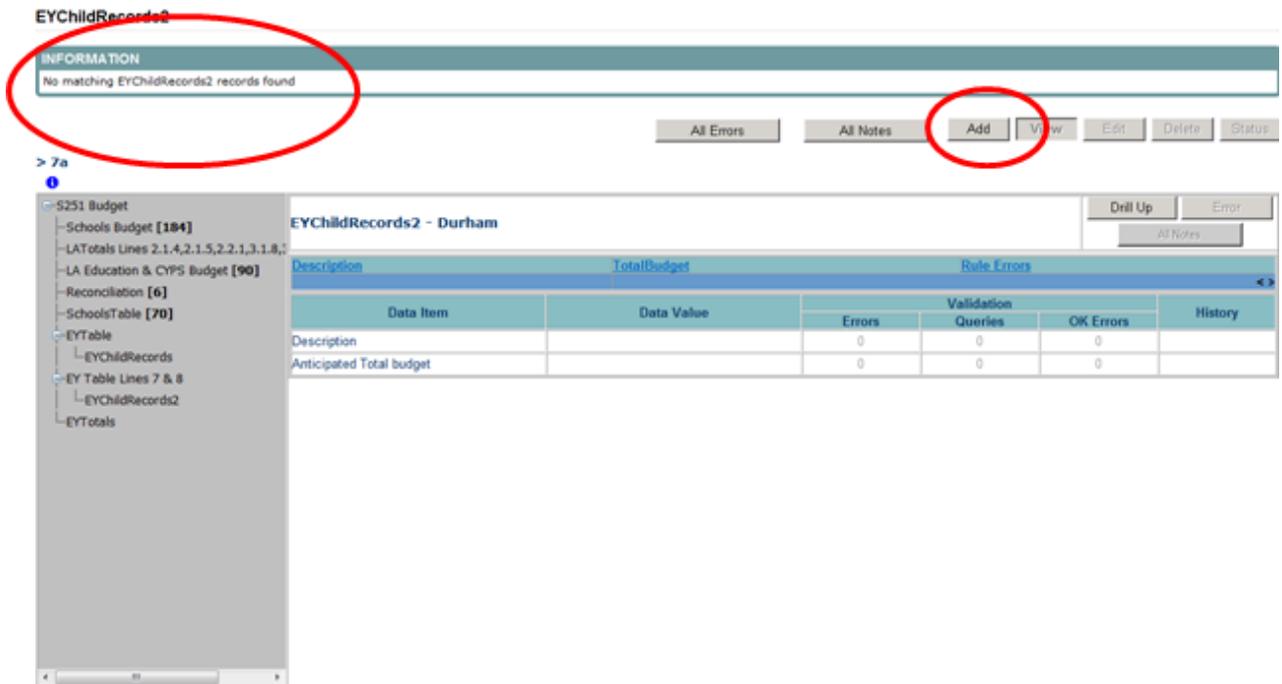
This then allows 'Description' and 'Anticipated Total budget' to be added and saved.
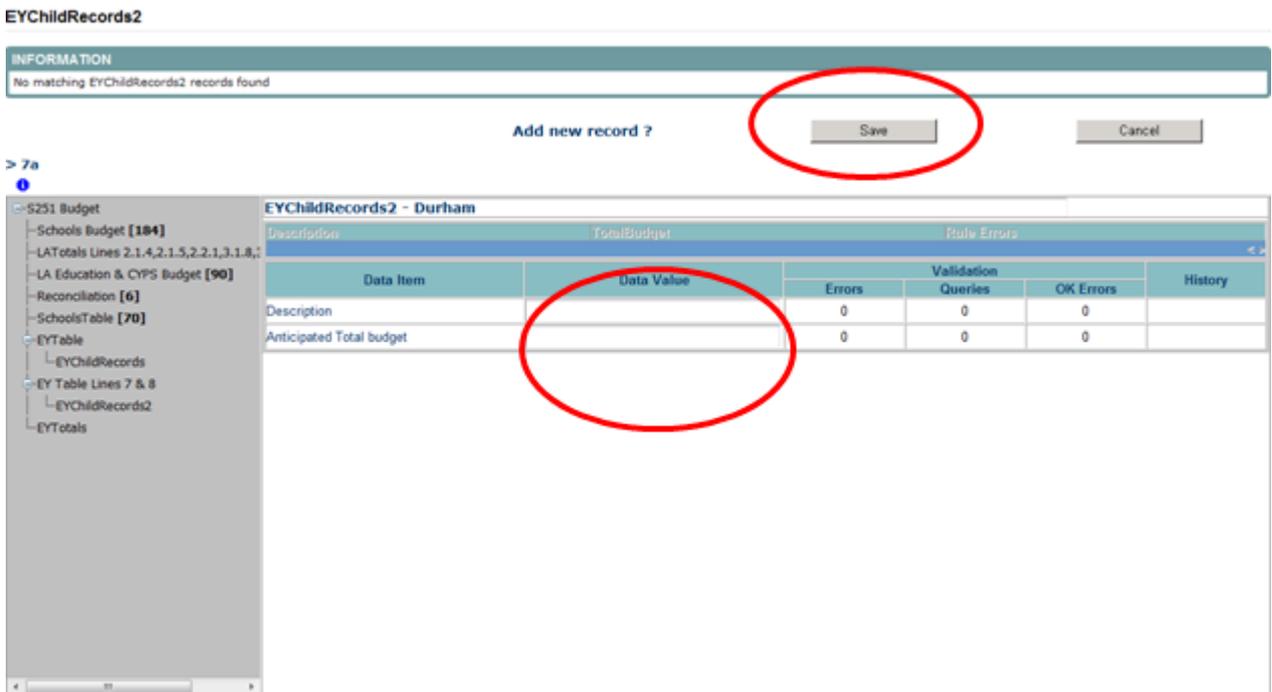
There will also be a similar screenshot showing 9. Early Years Pupil Premium Allocation

Department for Education

Back to My COLLECT page | Help
You are logged in as pshakenshaft | Log out

BLADE UAT COLLECT Portal

EY Table Line 9

| All Errors | | All Notes | | | Add | View | Edit | Delete | Status |

- S251 Budget [3]
  - Schools Budget [185]
  - LATotals Lines 2.1.4 to 2.2.1,3.1.8,3.1.11,7 [51]
  - LA Education & CYPS Budget [90]
  - Reconciliation [6]
  - SchoolsTable
  - EYTable
    - EYChildRecords
  - EY Table Line 9
  - EY Table Lines 7 & 8
    - EYChildRecords2
  - EYTotals

EY Table Line 9 - Barnsley

| Drill Up | Error |
| All Notes |

RowNumber
9. Early years pupil premium allocation

Data Item	Data Value	Errors	Validation Queries	OK Errors	History
9 Early Years Pupil Premium Allocation		0	0	0	

Checking data

COLLECT will notify you of any values outside usual parameters by producing a red box next to that field. You can navigate to an error by clicking on the red box or by going to the 'All Errors' button.

Once you have clicked the 'All Errors' button you will be taken to the blade error report, shown below. You can view details of a particular error by clicking on the 'Details' button.

Once you have clicked the 'Details' button you will see the details appear on the right-hand side of the screen.

You can then navigate to an error by clicking 'Value' on the right-hand side of the screen, to be taken to the section where the error occurs. In the case above the value is 'null'.

Providing clarification/supplementary information

There is a section on the first page of the budget return 'S251 Budget' where supplementary information can be provided. Clicking on 'Edit' will free up the text boxes for LA table, school table and early years notes.

Once you have completed adding your notes, click on 'View' to save them.

History

Changes that are made to data items are recorded in the history log and indicated with an icon in the audit history column against that data item

This shows that the user BMcGuigan with the role of 'Source' amended the value of early years data.

Every time the data is changed, the system records the old and new values, who changed it, their role and when it was changed. Once a data item has been changed the status of the return will change to 'Amended_by_Source' and be reflected in both the LA and DfE views.

Submitting returns

Once your data has been added to the COLLECT system, checked, all errors or queries dealt with, and you are satisfied with the quality of the data, then the return should be submitted to the Department for Education (DfE). This indicates to the DfE that your return is complete.

To do this select the 'Submit Return' button from the main 'Source' page which is available after login.

NOTE: it is important that the return is submitted as checking of the data by the DfE will not start until return has been submitted.

Those LAs that have previously submitted their return and wish to make some amendments will need to contact the Data collections helpdesk via a Service Request Form.

Launching reports

There are a number of reports available from the COLLECT system which will allow you to produce the reports directly from COLLECT.

To launch reports, select the ''Launch Report' button from the main screen.
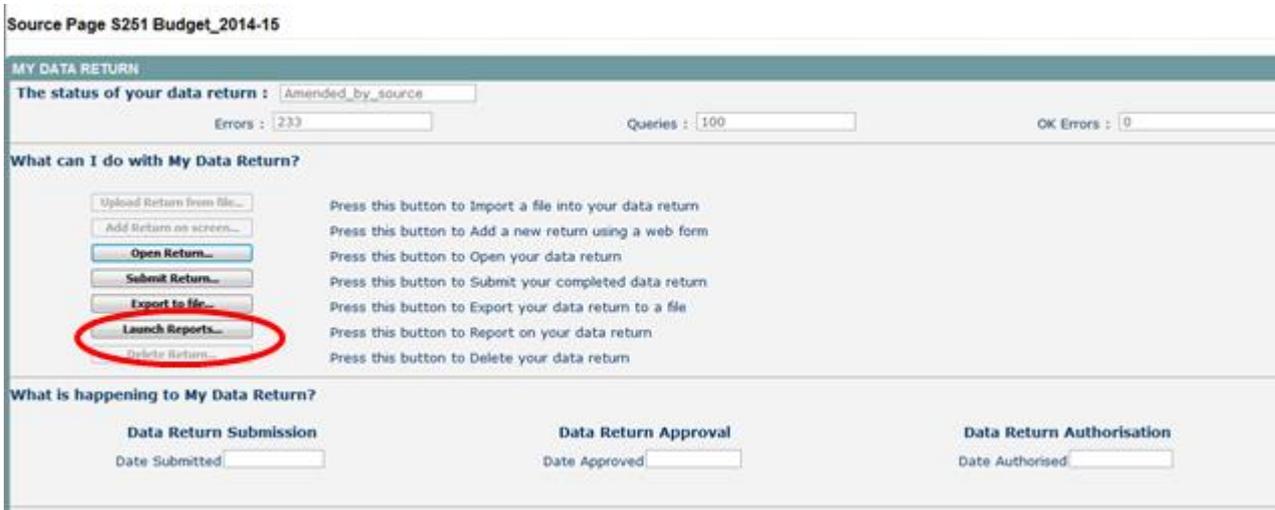
Select the report you want to run from the drop-down list. The report can be printed off or can be saved as an excel file.
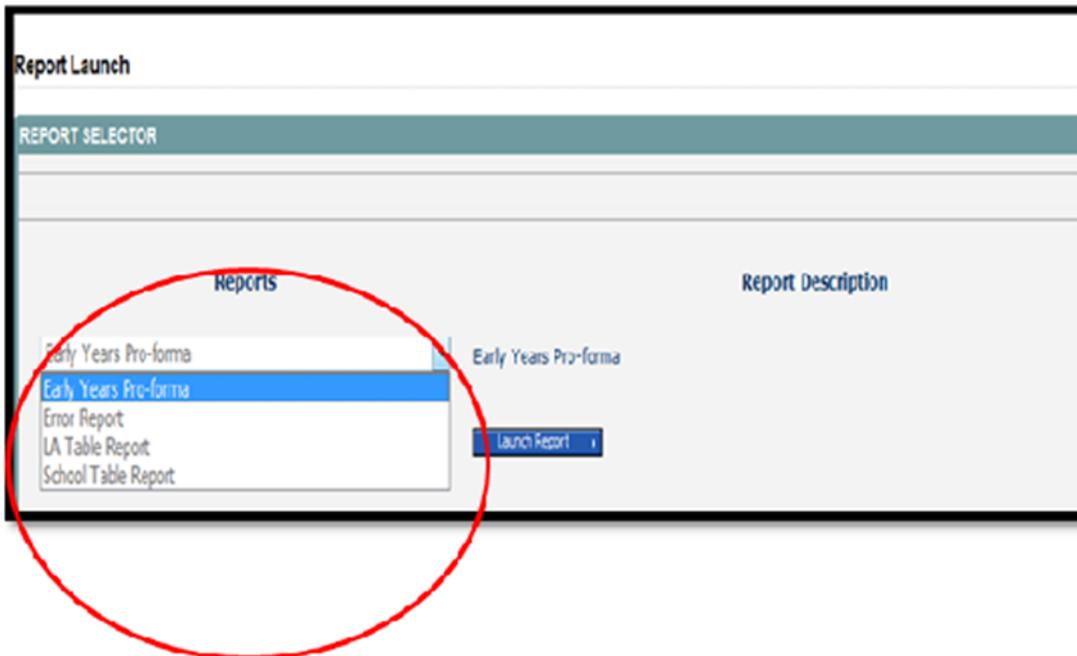
General tips on navigating around COLLECT screens

Before viewing the return it is useful to understand some of the basic controls and screen operations.

Don't use the browser buttons! When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.

Navigation through a return

To navigate through the system, links are provided on all pages either as 'Back' or 'Drill Up' options. Please use these links to navigate between screens when using the system.

| Control	Usually located	Action
Back to my collect page	All screens within a return except the main page which shows Back to Home page	Returns you to the main page for your user role (Agent, Source etc)
Drill Up	Any data screen within a return apart from the header screen	Returns you to the previous data screen
Return	Report screens, e.g. History and errors	Returns you to the previous screen
Back	Notes screens	Returns you to the previous screen
View All	Data entry screens that have additional linked data, e.g. accesses contract details for a workforce member	Takes you to the sub module level details

Mode buttons

Those buttons determine which operation mode the data form on screen is in and which operations are available.

Dark grey text on sunken button with light border = Active Mode
Black text on button and highlighted border = Available Mode
Light grey text on button with light border = Unavailable Mode

Left-hand menu

The left-hand menu can also be used to migrate to different screens by clicking on one of the options in the grey left-hand menu. This is a useful for quick navigation when needed.

Please note that when using the left-hand menu the 'Add' button will be disabled. When adding records (eg schools, EY child records) the user will have to use the drill down links.

Help

If you have a query regarding COLLECT or S251 please submit a [service request form](#) to the data collections helpdesk.

If you are experiencing problems with COLLECT or have an S251 budget data collection query, please submit a [data collections service request form](#)If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access.
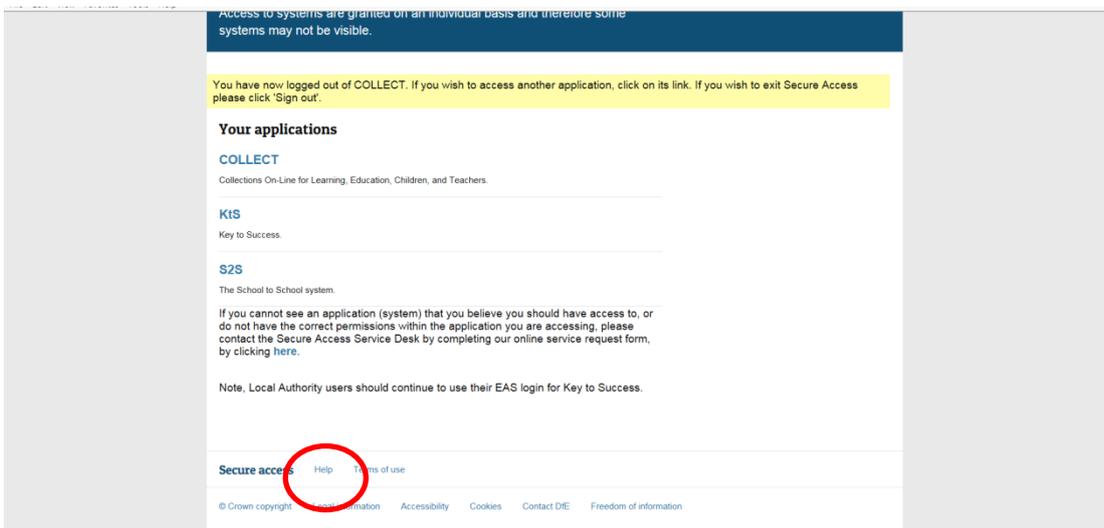
If you are still unable to resolve your issue, please submit a SA [service request.](#)

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