



Department
for Education

Funding Information System (FIS) user guide 2026 to 2027

August 2026

Contents

Table of figures	3
What is the Funding Information System (FIS)	5
Data security	5
Where to find the FIS download	5
Things you need to have to download FIS	5
Download the latest version of FIS	5
Where to find FIS for download	6
How to download and configure FIS for the first time	8
How to change output location	11
Export to CSV	11
Logs	13
About	14
Check for updates – new versions for download or new reference data	14
No updates needed	15
New version of FIS is available	15
New reference data is available	16
Connection failed	17
How to use FIS	17
Connections and export output to SQL (optional)	20
Help and support	24

Table of figures

Figure 1: Link for FIS	6
Figure 2: Link for FIS downloads	7
Figure 3: Compressed file for download	8
Figure 4: Extracting from the compressed file	8
Figure 5: Choosing extract location	9
Figure 6: Extract creates a new folder	9
Figure 7: Progress bar during extraction	9
Figure 8: Opening FIS	10
Figure 9: FIS main screen	10
Figure 10: Settings function	10
Figure 11: Settings function	11
Figure 12: Choose output location	11
Figure 13: Selecting to export to CSV	11
Figure 14: Example of CSV outputs	11
Figure 15: Example log	12
Figure 16: About - showing application and reference data version details	13
Figure 17: Check for updates	14
Figure 18: Check for updates confirms you are using the latest version	14
Figure 19: Example where new version is available	15
Figure 20: Example where new reference data is available	15
Figure 21: Displays version details and update options	15
Figure 22: Advisory messages showing % to download	16
Figure 23: Advisory messages showing you are using the latest version	16
Figure 24: Advisory message showing you your connection has failed	16
Figure 25: Choose file	17
Figure 26: Progress bar	17
Figure 27: Example location where outputs are stored	17
Figure 28: Example output folder	18
Figure 29: FIS reports	19
Figure 30: Selecting export to SQL with no connection string set up	20
Figure 31: Choosing server details - configure	20

Figure 32: Choosing server name	21
Figure 33: Message whilst retrieving server details	21
Figure 34: Adding database name	21
Figure 35: Changing database name	22
Figure 36: Selecting SQL server authentication	22
Figure 37: Test connection results	22
Figure 38: Selecting export to SQL shows connections string set up	23

What is the Funding Information System (FIS)

FIS is a desktop application designed to help you prepare your ILR file for submission to the DFE through the 'Submit Learner Data' service. FIS includes an application program interface (API) which will indicate and allow updates via a simple downloadable link when:

- new reference data is available (usually twice per month)
- a new full version of FIS is available (these will now only be necessary if a change has taken place)
- there is also an improved facility to check for connection issues

You do not have to use FIS to prepare your file for submission, but some providers find it useful. It gives you a good idea of the quality of the data you have collected, and this generates provisional reports.

To do this, it uses most of the current year's validation rules to give you an idea of the errors and warnings your file may generate.

As reference data changes all the time, you may still find your file has some errors or warnings when you submit it, even if it does not have any in FIS.

Data security

By using FIS, you take responsibility for the security of the data.

Where to find the FIS download

Things you need to have to download FIS

- Net Framework 4.6.1 - download this from [Microsoft](#)

Download the latest version of FIS

Select the link to 'FIS (Funding Information Service)' from the tools and services menu on the [Submit Learner Data](#) sign in page. Or you can go direct to the FIS download page using: [FIS Tool](#).

Figure 1: Link for FIS

**Submit learner data**

LIVE Your [feedback \(opens in new tab\)](#) will help us improve the service.

Submit learner data

This service is for organisations submitting, validating or viewing data for the following data collections:

Use this service to validate and submit:

- Individualised learner records (ILR)
- Earnings adjustment statements (EAS)
- ESF (European Social Fund) supplementary data
- Funding Claims
- further education staff and vacancy data
- further education governor data
- Skills Bootcamp contracts (SBC)
- Search for Employer identifiers using the new Employer Data Service

Devolved Authorities can download reports and upload reference data.

Sign in

Before you start

You'll need a [DfE Sign-in account](#) to use this service. Read about our [user roles and permissions](#).

Help and support

Find further information at the [Customer Help Centre](#) where you can [read our help articles](#), talk to our Community, chat to our [Virtual assistant](#) or submit an enquiry.

Related content

[How to become an approved training provider](#)

[Individualised Learner Record \(ILR\) technical documents, guidance and requirements \(all years\)](#)

Tools and services

[FIS \(Funding Information Service\)](#)

[Find a Learning Aim](#)

[Enter learning data](#)

[ILR Learner entry tool](#)

[ILR FileMerge](#)

[FE staff data desktop application](#)

Where to find FIS for download

Ensure you select the latest version for the academic year to download.

When downloading previous academic year versions of FIS, be aware that all versions prior to V1.2 in academic year 2020 to 2021 will contain static reference data relevant to the version at the time, the introduction of the API was at V1.2.

If downloading for the first time, choose the latest version of FIS available and select the downloadable link.

Figure 2: Link for FIS downloads

FIS (Funding Information Service) tool

FIS is a desktop application for the Department for Education’s data collections system. Providers can use it to validate Individualised Learner Record (ILR) data.

Filter by year

The page will refresh after you select each filter.

☐ 2026
to
2027

☐ 2025
to
2026

☐ 2024
to
2025

☐ 2023
to
2024

☐ 2022
to
2023

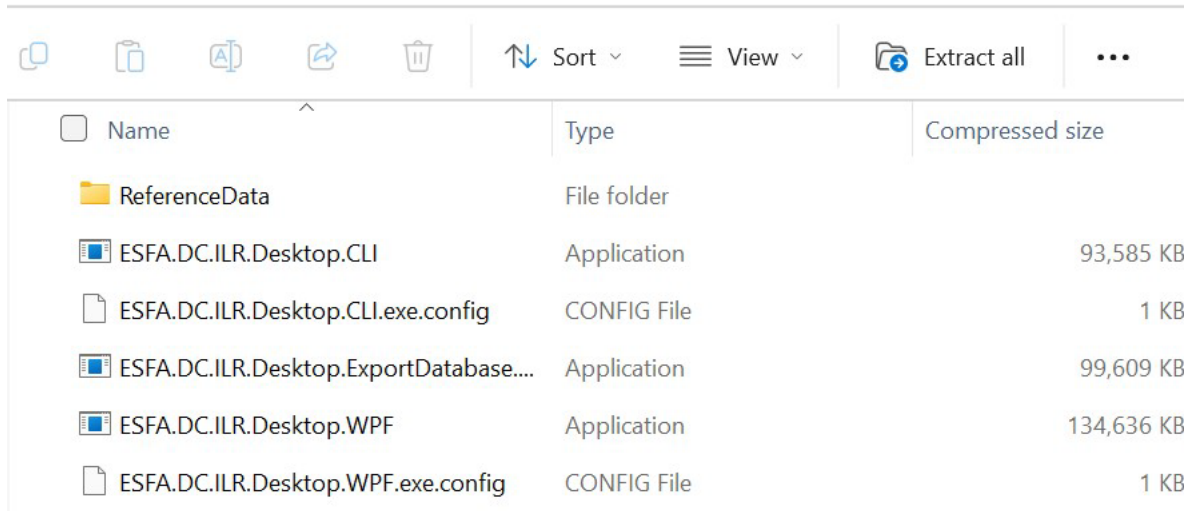
Academic year 2026 to 2027

Version	Date and time uploaded	Download Link
2627.1.26	25 March 2026 at 1:15pm	Download 2627.1.26

How to download and configure FIS for the first time

Once you have selected the downloadable link a FIS Desktop compressed (zipped) folder will download. Move this to your chosen folder location to store and run FIS from.

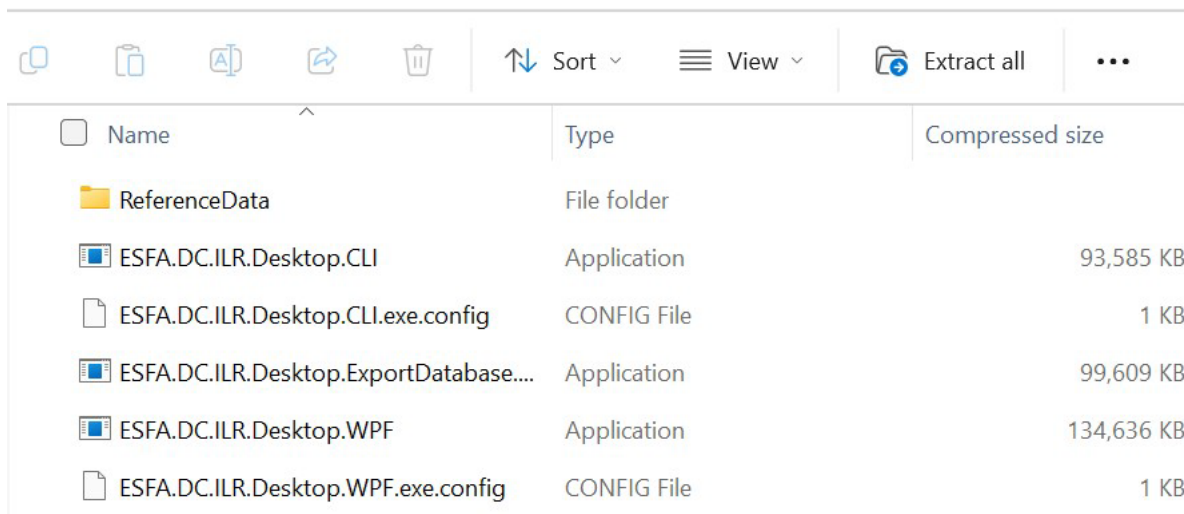
Figure 3: Compressed file for download



Name	Type	Compressed size
ReferenceData	File folder	
ESFA.DC.ILR.Desktop.CLI	Application	93,585 KB
ESFA.DC.ILR.Desktop.CLI.exe.config	CONFIG File	1 KB
ESFA.DC.ILR.Desktop.ExportDatabase....	Application	99,609 KB
ESFA.DC.ILR.Desktop.WPF	Application	134,636 KB
ESFA.DC.ILR.Desktop.WPF.exe.config	CONFIG File	1 KB

Right click on the file and then select 'Extract All'.

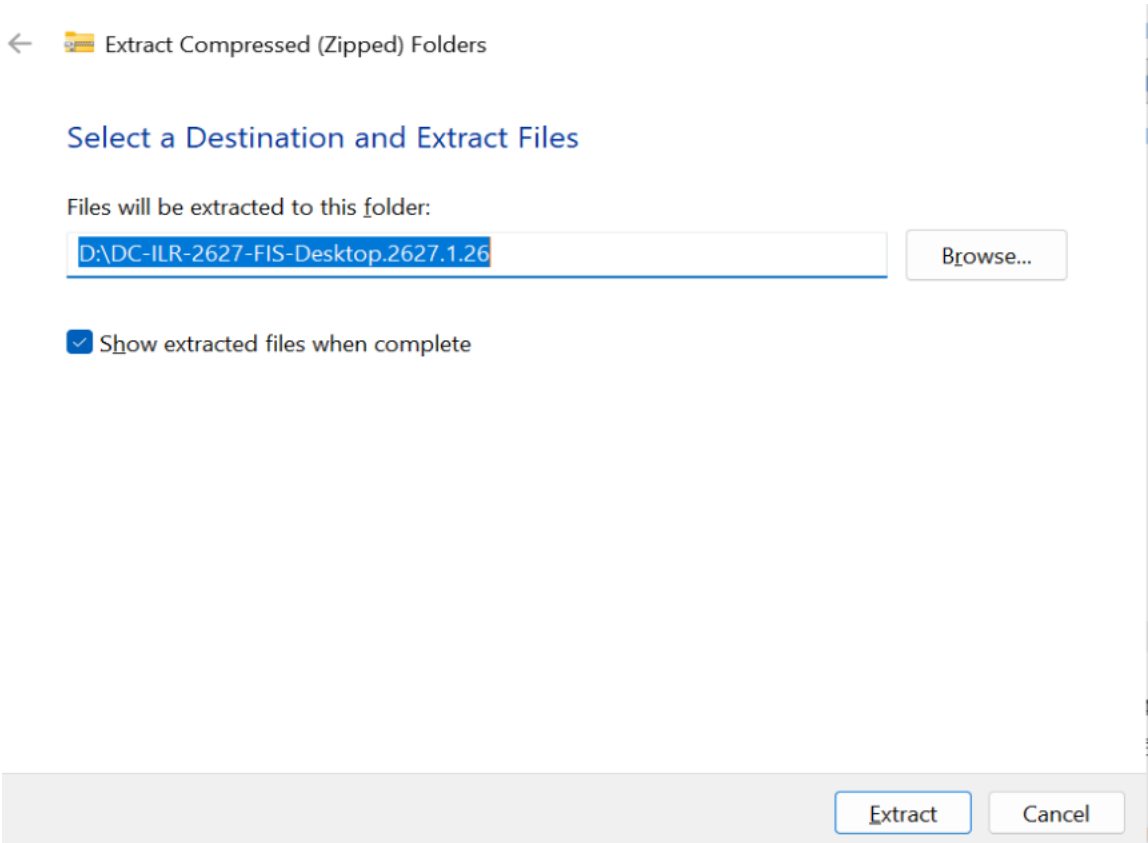
Figure 4: Extracting from the compressed file



Name	Type	Compressed size
ReferenceData	File folder	
ESFA.DC.ILR.Desktop.CLI	Application	93,585 KB
ESFA.DC.ILR.Desktop.CLI.exe.config	CONFIG File	1 KB
ESFA.DC.ILR.Desktop.ExportDatabase....	Application	99,609 KB
ESFA.DC.ILR.Desktop.WPF	Application	134,636 KB
ESFA.DC.ILR.Desktop.WPF.exe.config	CONFIG File	1 KB

Select the folder (browse to location if required) where you would like FIS to be extracted to and then click on 'Extract'.

Figure 5: Choosing extract location



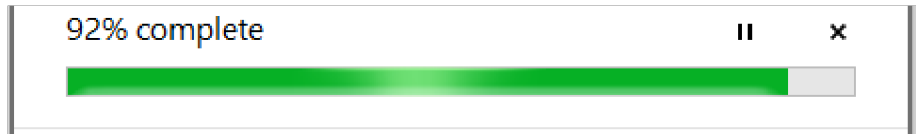
The extract will create a new File Folder, double click on the file name.

Figure 6: Extract creates a new folder

Name	Date modified	Type	Size
Logs	3/26/2026 12:50 PM	File folder	
ReferenceData	3/26/2026 12:50 PM	File folder	
DC.ILR.Desktop.CLI	3/26/2026 12:50 PM	Application	254,465 KB
DC.ILR.Desktop.CLI.exe.config	3/26/2026 12:50 PM	CONFIG File	2 KB
DC.ILR.Desktop.ExportDatabase.Console	3/26/2026 12:50 PM	Application	316,658 KB
FIS DC.ILR.Desktop.WPF	3/26/2026 12:50 PM	Application	366,285 KB
DC.ILR.Desktop.WPF.exe.config	3/26/2026 12:56 PM	CONFIG File	2 KB

Whilst processing a bar will display to indicate completeness of download.

Figure 7: Progress bar during extraction



Open the new folder and the FIS extract files will now be displayed, scroll down to the file showing the FIS Icon and double click the file named 'ESFA.DC.ILR.Desktop.WPF'.

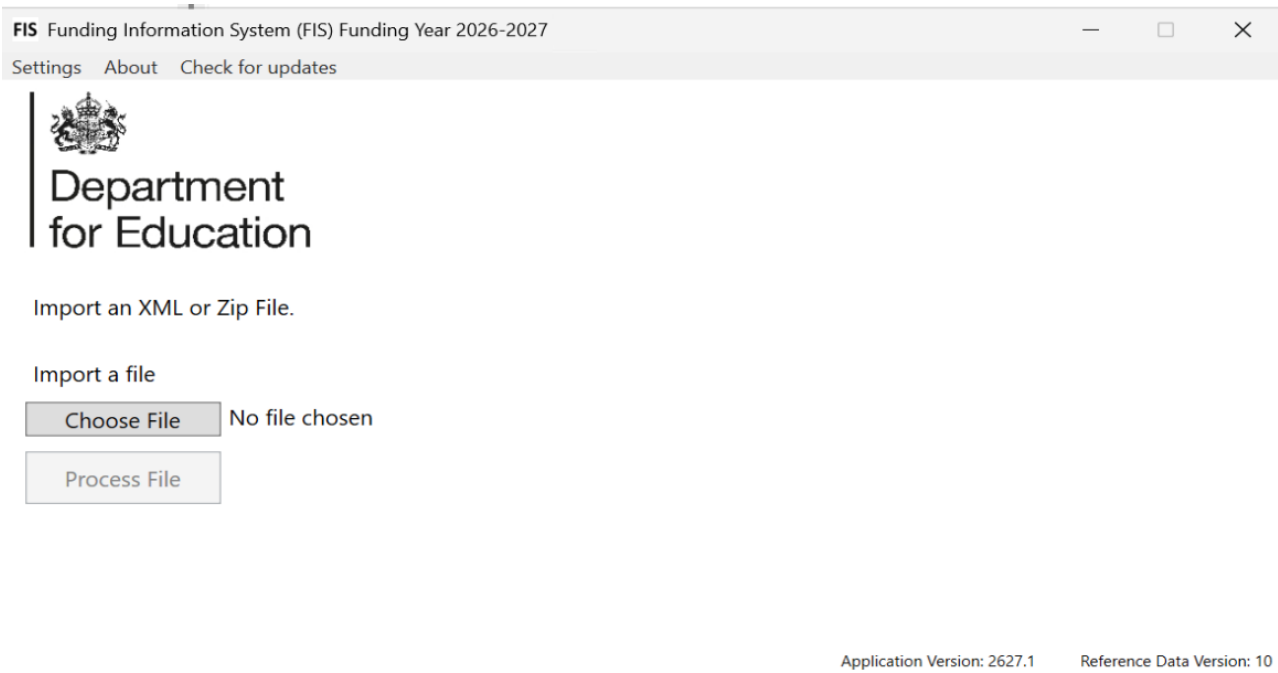
Figure 8: Opening FIS

Name	Date modified	Type	Size
Logs	3/26/2026 12:50 PM	File folder	
ReferenceData	3/26/2026 12:50 PM	File folder	
DC.ILR.Desktop.CLI	3/26/2026 12:50 PM	Application	254,465 KB
DC.ILR.Desktop.CLI.exe.config	3/26/2026 12:50 PM	CONFIG File	2 KB
DC.ILR.Desktop.ExportDatabase.Console	3/26/2026 12:50 PM	Application	316,658 KB
FIS DC.ILR.Desktop.WPF	3/26/2026 12:50 PM	Application	366,285 KB
DC.ILR.Desktop.WPF.exe.config	3/26/2026 12:56 PM	CONFIG File	2 KB

The FIS Application for 2026 to 2027 will now open. When opening new versions of FIS they will normally contain the latest reference data. It is always advisable to ‘Check for Updates’ to ensure this is the case, especially when the version has been available for some time.

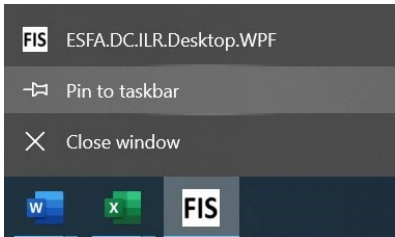
See section on: [Checking for Updates – new versions for download or new reference data.](#)

Figure 9: FIS main screen



When opening FIS, the FIS icon will appear on your taskbar. If you use FIS often it is a good idea to right click and pin it to the taskbar.

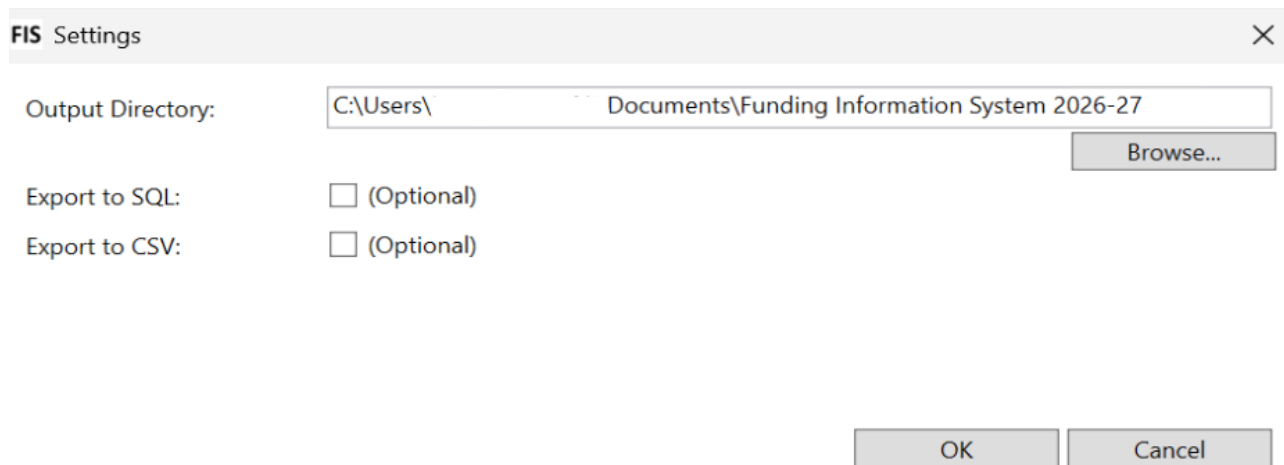
Figure 10: Settings function



How to change output location

When the FIS Application is open select 'Settings' in the top left-handed corner. For 'Output Directory', choose the folder where you want the reports FIS generates to be exported to.

Figure 11: Choose output location



You can also 'Browse' to change the location.

For advanced technical users there is an option to [connect and export output to SQL](#).

Export to CSV

If you wish to export to CSV, tick the 'Export to CSV' box and then select the 'Output Directory' where the data should be exported to. Click on 'OK'.

Figure 13: Selecting to export to CSV

FIS Settings

X

Output Directory:

C:\Users\ \Documents\Funding Information System 2026-27

Browse...

Export to SQL:

☐ (Optional)

Export to CSV:

☒ (Optional)

OK

Cancel

The CSV zip file will appear in the selected output directory.

Figure 14: Example of CSV outputs

Name	Date modified	Type	Size
FIS-CSV 20260326-134211	3/26/2026 2:02 PM	File folder	
16-19 Funding Calculation Full Output Report 2...	3/26/2026 1:43 PM	XLSX File	111 KB
16-19 Funding Claim Report 20260326-134211	3/26/2026 1:43 PM	XLSX File	37 KB

Logs

When running FIS logs are created to advise on any errors and the steps processed. These logs will be found in the output directory location previously selected. If you are experiencing any issues and raise a call to our helpdesk it is important that the associated logs are also sent, as they hold vital information to enable us to investigate.

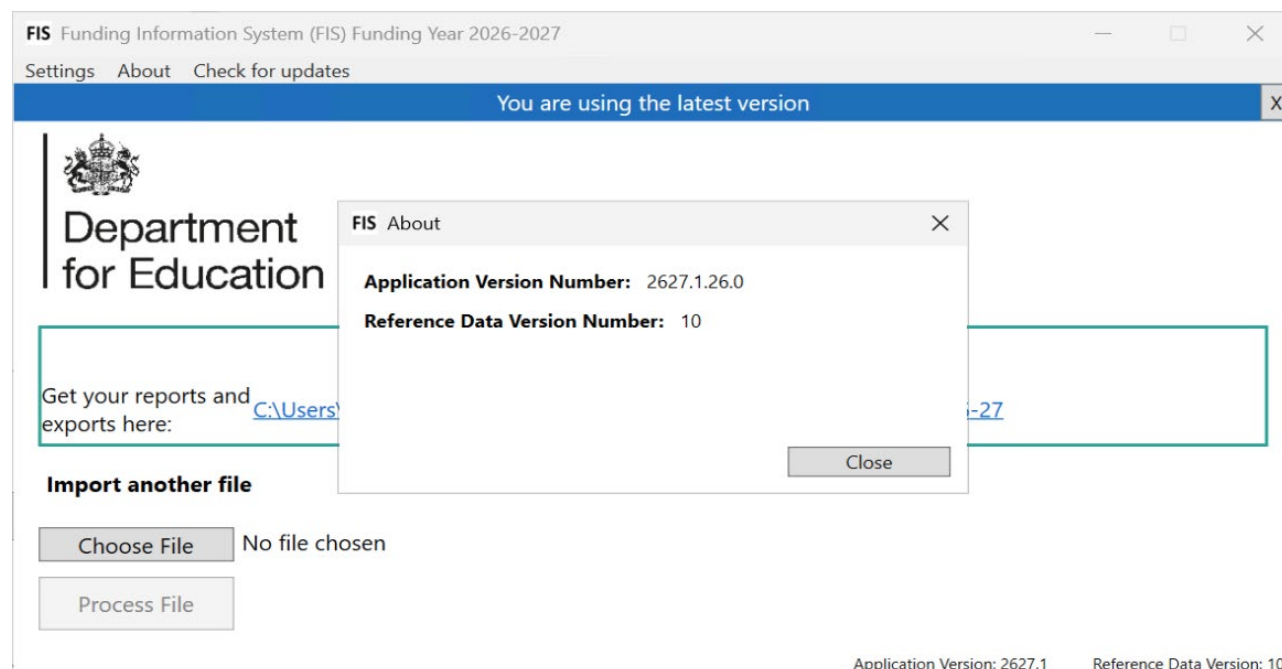
Figure 15: Example log

DateTime	Level	Message
50:52.4	INFO	ILR Desktop Application Start
50:52.4	INFO	Reading appsettings from D:\DC-ILR-2627-FIS-Desktop.2627.1.26\DC-ILR.Desktop.WPF.exe.config
50:52.4	INFO	Checking Reference Data in [D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\]
50:52.4	INFO	Found Reference Data File D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\FISReferenceData.10.zip
50:52.5	INFO	Writing appsettings to D:\DC-ILR-2627-FIS-Desktop.2627.1.26\DC-ILR.Desktop.WPF.exe.config
50:52.5	INFO	Checking Reference Data in [D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\]
50:52.5	INFO	Found Reference Data File D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\FISReferenceData.10.zip
50:52.5	INFO	Application version number : 2627.1
50:52.5	INFO	Reference Data version number : 10
50:52.9	INFO	Retrieving latest known Application Version.
50:52.9	INFO	Retrieving Application versions from SLD API.
50:52.9	INFO	Attempting to call https://publicapi.tst.submit-learner-data.service.gov.uk/api/v1/ApplicationVersions/isLatest/2627/2627/1
50:53.1	INFO	Attempting to call https://publicapi.tst.submit-learner-data.service.gov.uk/api/v1/ReferenceDataVersions/latestVersion/2627/10
50:53.2	INFO	Finished retrieving Application versions from SLD API.
50:53.2	INFO	Finished Retrieving latest known Application Version.
56:30.6	INFO	Writing appsettings to D:\DC-ILR-2627-FIS-Desktop.2627.1.26\DC-ILR.Desktop.WPF.exe.config
01:57.6	INFO	ILR Desktop Application Start
01:57.8	INFO	Reading appsettings from D:\DC-ILR-2627-FIS-Desktop.2627.1.26\DC-ILR.Desktop.WPF.exe.config
01:57.8	INFO	Checking Reference Data in [D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\]
01:57.8	INFO	Found Reference Data File D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\FISReferenceData.10.zip
01:57.8	INFO	Checking Reference Data in [D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\]
01:57.8	INFO	Found Reference Data File D:\DC-ILR-2627-FIS-Desktop.2627.1.26\ReferenceData\FISReferenceData.10.zip
01:57.8	INFO	Application version number : 2627.1
01:57.8	INFO	Reference Data version number : 10
01:58.3	INFO	Retrieving latest known Application Version.
01:58.3	INFO	Retrieving Application versions from SLD API.

About

At any point you can check the 'About' tab at the top of the screen to see what application version and reference version you are using.

Figure 16: About - showing application and reference data version details



Check for updates – new versions for download or new reference data

This feature will let you know if there is new reference data available or a new application version is available. New application versions are only necessary when structural enhancements are made, whilst reference data is normally updated twice monthly. On opening FIS it will automatically perform checks for all updates and if found will indicate the results by highlighting in the blue banner, these results may be:

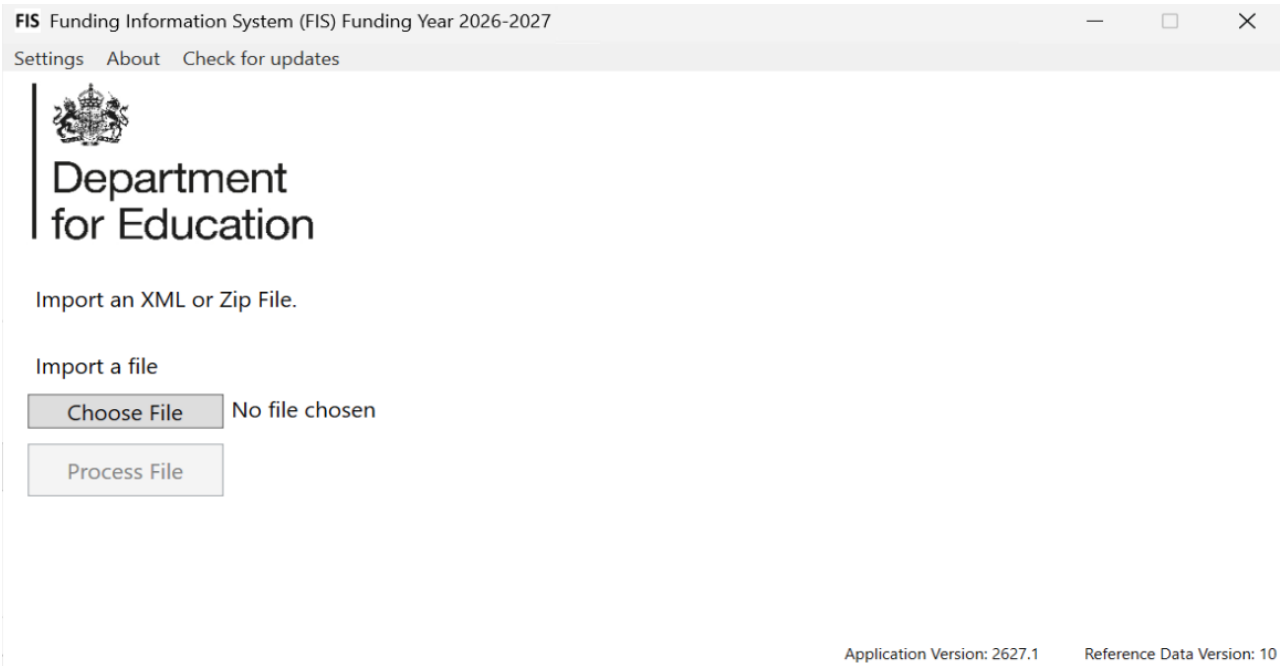
- you are using the latest version
- new reference data or a newer version of the FIS application may be available

It will also warn you if your connection has failed.

If you have left FIS open for a few days, it is always good to close it down and reopen as it will perform the updates check. This can also be done at any time by selecting the 'Check for updates tab' at the top of the screen.

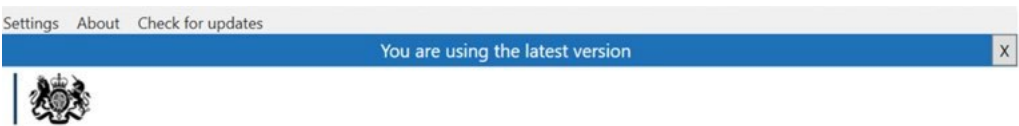
The blue banner contains an X button option to close the banner, should you not wish to proceed with any updates.

Figure 17: Check for updates



No updates needed

Figure 18: Check for updates confirms you are using the latest version



New version of FIS is available

When a new version of FIS is available the following message will appear – all new versions will contain the latest reference data when the version was created. The link will take you back to the FIS Download page as shown previously. It will be necessary to select the latest version of FIS for download and follow the earlier steps to download and configure FIS.

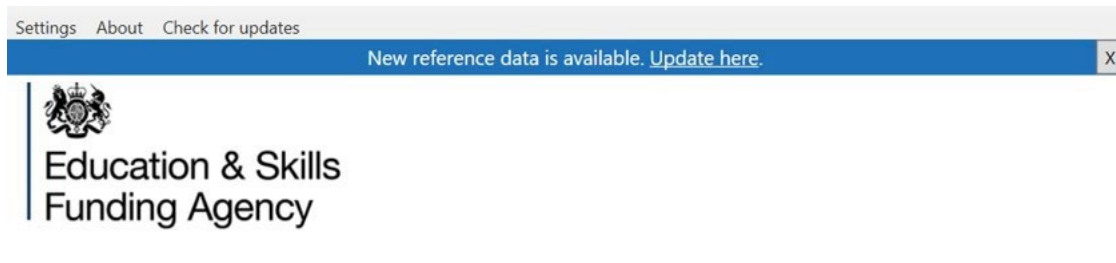
Figure 19: Example where new version is available



New reference data is available

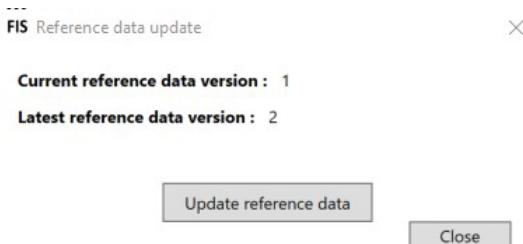
When only new reference data is available the following message will appear. For the reference data you will be able to update it within your current version by clicking on the 'Update here' link.

Figure 20: Example where new reference data is available



Select the 'Update here' link and the next screen will display version details with an option to 'Update reference data'.

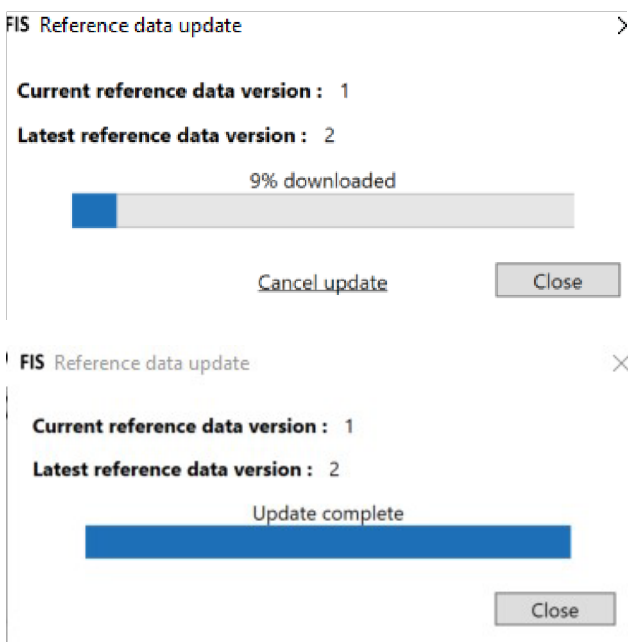
Figure 21: Displays version details and update options



When uploading reference data

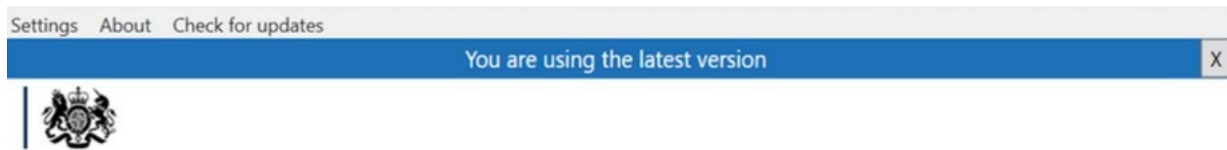
the screen will indicate the % downloaded and also advise when completed.

Figure 22: Advisory messages showing % to download



Once completed select 'Close' and the screen will show you are using the latest version.

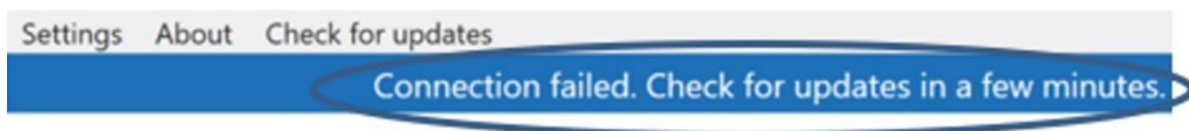
Figure 23: Advisory messages showing you are using the latest version



Connection failed

If the API connection is unavailable the following message will appear. To retry, select 'Check for Updates again'.

Figure 24: Advisory message showing you your connection has failed



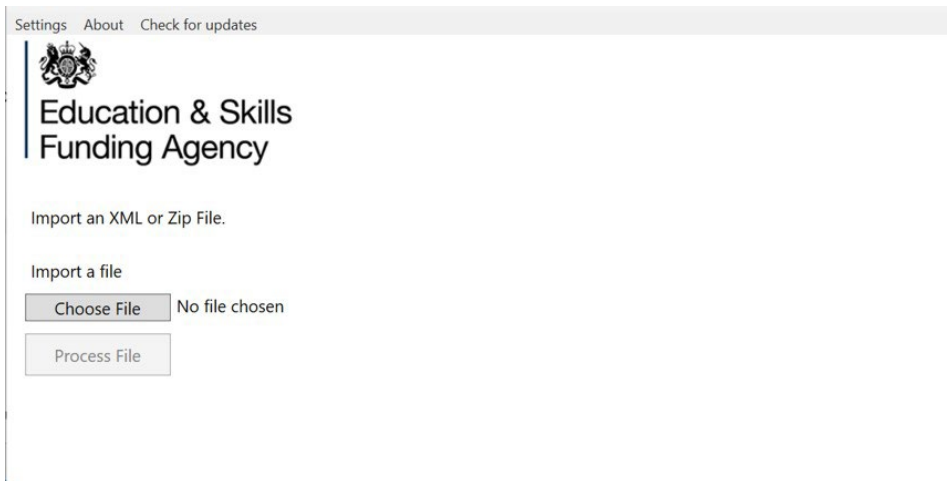
How to use FIS

To open FIS either:

- go to the file folder where FIS is stored and click the "ESFA.DC.ILR.Desktop.exe" file
- you may have pinned FIS to your taskbar

Select 'Choose file' to select your Zip or XML file from your file location and then click on 'Process File'.

Figure 25: Choose file



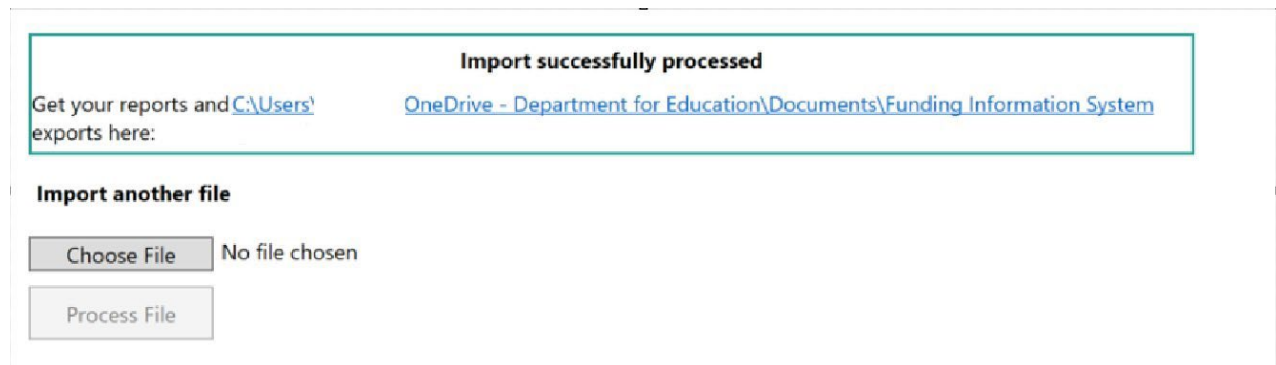
You will see a progress bar indicating how long is left to process your file. **Figure**

26: Progress bar



When processing has finished you can get your reports by selecting the link, this will be the Output Directory you have chosen in 'Settings'.

Figure 27: Example location where outputs are stored



Open the file folder and your reports will be displayed.

If the file could not be processed, you will receive the message 'We can't process your file'. You will also receive a link to the validation reports, where you can find out why the file did not work.

Figure 28 Example validation issue

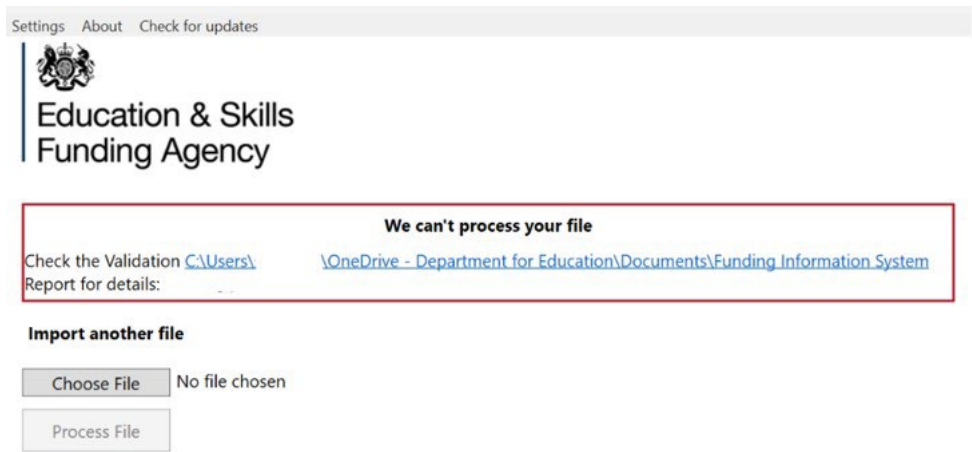


Figure 29: Example output folder



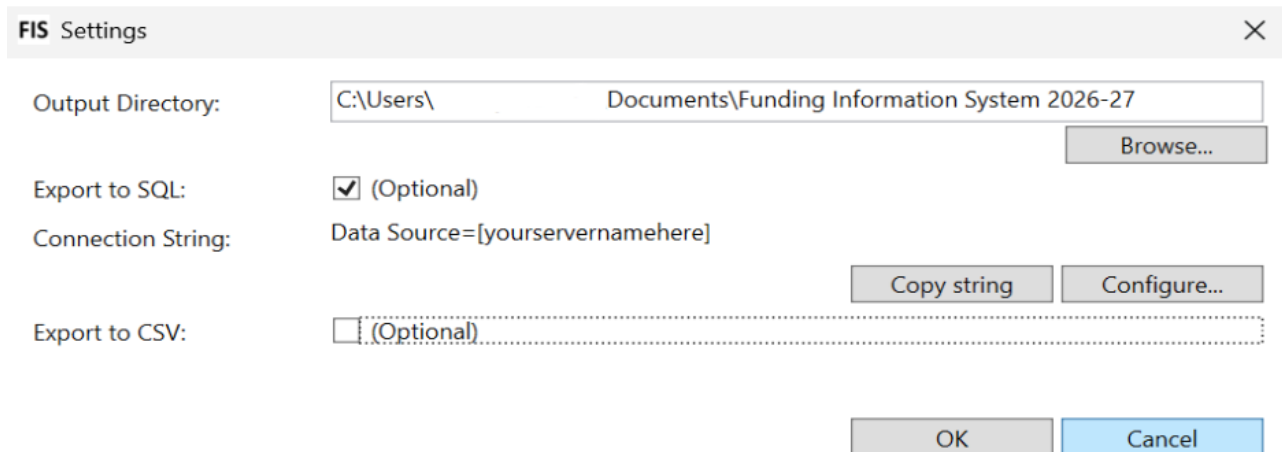
Figure 30: FIS reports

	16-19 Funding Calculation Full Output Report 2...	3/26/2026 1:43 PM	XLSX File	111 KB
	16-19 Funding Claim Report 20260326-134211	3/26/2026 1:43 PM	XLSX File	37 KB
	16-19 Summary of Funding by Student Report ...	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	1 KB
	Adult Funding Claim Report 20260326-134211	3/26/2026 1:43 PM	XLSX File	14 KB
	ALLB Occupancy Report 20260326-134211	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	5 KB
	Apps Indicative Earnings Report 20260326-134...	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	10 KB
	CL Summary of Learners by Non-Single Budget ...	3/26/2026 1:43 PM	XLSX File	14 KB
	Devolved Adult Skills Funding Occupancy Repo...	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	7 KB
	Devolved Adult Skills Funding Summary Report...	3/26/2026 1:43 PM	XLSX File	7 KB
	FIS-CSV 20260326-134211	3/26/2026 1:43 PM	Compressed (zipped)...	23 KB
	Funding Summary Report 20260326-134211	3/26/2026 1:43 PM	XLSX File	14 KB
	High Needs Students Detail Report 20260326-1...	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	1 KB
	High Needs Students Summary Report 202603...	3/26/2026 1:43 PM	XLSX File	30 KB
	Main Occupancy Report 20260326-134211	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	6 KB
	Maths and English Report 20260326-134211	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	1 KB
	OfS HE Quality Control Report 20260326-1342...	3/26/2026 1:43 PM	XLSX File	50 KB
	Rule Violation Report 20260326-134211	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	1 KB
	Rule Violation Summary Report 20260326-134...	3/26/2026 1:43 PM	XLSX File	15 KB
	Summary of Funding Model 35 Funding Report...	3/26/2026 1:43 PM	OpenOffice.org 1.1 S...	4 KB

Connections and export output to SQL (optional)

You may wish to integrate FIS with your SQL server software if you have it. This is entirely optional. In general you would only do this as an advanced technical user. If you do wish to, select the checkbox that says 'Export to SQL' and then 'Configure' to add connection details.

Figure 31: Selecting export to SQL with no connection string set up



The screenshot shows the 'FIS Settings' dialog box. The 'Output Directory' is set to 'C:\Users\... Documents\Funding Information System 2026-27'. The 'Export to SQL' checkbox is checked, with '(Optional)' next to it. The 'Connection String' field contains 'Data Source=[yourservernamehere]'. There are 'Copy string' and 'Configure...' buttons next to the connection string. The 'Export to CSV' checkbox is unchecked, with '(Optional)' next to it. At the bottom are 'OK' and 'Cancel' buttons.

FIS Settings		×
Output Directory:	C:\Users\... Documents\Funding Information System 2026-27	
		Browse...
Export to SQL:	☒ (Optional)	
Connection String:	Data Source=[yourservernamehere]	
	Copy string	Configure...
Export to CSV:	☐ (Optional)	
	OK	Cancel

To configure you will need to:

- select the server name
- select the database name
- add the username and password (if needed)

The connection string will be created automatically once you click 'OK'. You will be able to see your updated connection string on the Figure 31 screen.

Figure 32: Choosing server details - configure

FIS Connection Properties

✕

Data source:

Microsoft SQL Server (SQL Client)

Change...

Server name:

[yourservernamehere] ▾

Refresh

Database name:

ILR2627 ▾

Log on to the server

☒ Use Windows Authentication

☐ Use SQL Server Authentication

User name

Password

This connection has not been successfully tested.

Test Connection

OK

Cancel

The screen will display a warning if the connection has not been successful.

To select the server name, choose from the drop-down list of SQL servers connected to your PC. You can also use 'Refresh' if you wish to select a different SQL server. **Figure**

33: Choosing server name

FIS Connection Properties

✕

Data source:

Microsoft SQL Server (SQL Client)

Change...

Server name:

.\SQLEXPRESS ▾

.\SQLEXPRESS

.

ILR2627 ▾

Refresh

Log on to the server

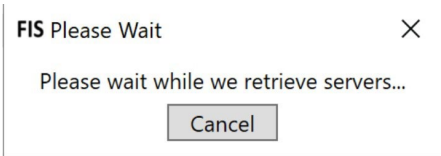
☒ Use Windows Authentication

☐ Use SQL Server Authentication

User name

Whilst retrieving server details the following message will appear.

Figure 34: Message whilst retrieving server details



Once the server is selected the database name dropdown will be populated with all available databases for this server. The default value is “ILR2526”, or you can type in your database name for selection.

Figure 35: Adding database name

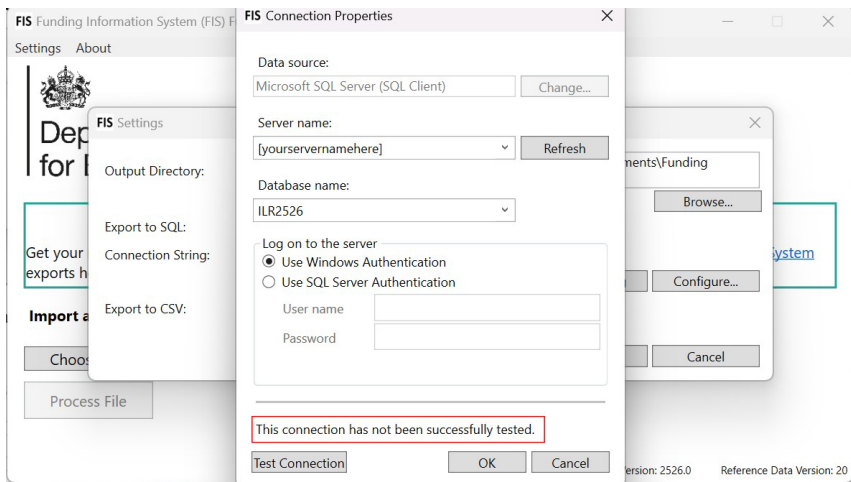
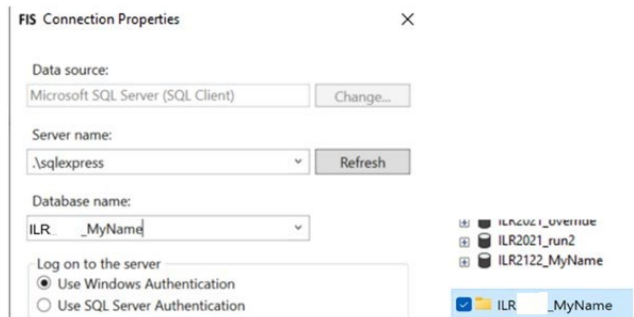


Figure 36: Changing database name



For logging on to the server there are options to use Window Authentication, or a username and password will be required (if selecting SQL Server Authentication). **Figure 37: Selecting SQL server authentication**



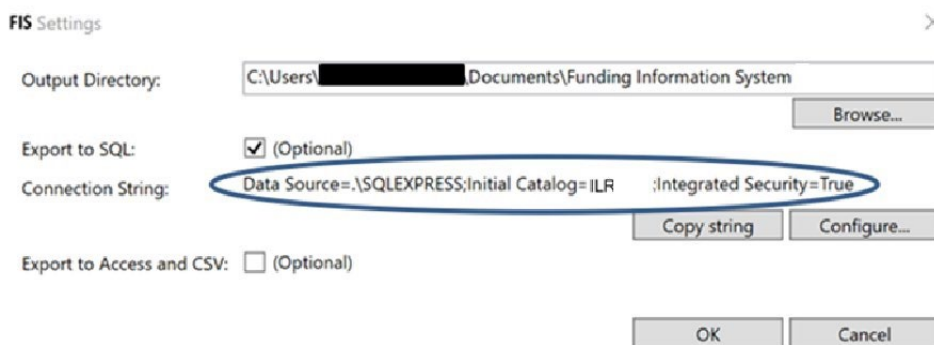
Once you have completed all server and database details you will need to ensure your connection is successful. Whilst setting up the message 'This connection has not been successfully tested' will appear. You can click 'Test connection' to ensure your connection is now successful. The success window will appear and you can select 'OK' to continue.

Figure 38: Test connection results



Once 'OK' is selected you will be brought back to the FIS settings page which will show the connection string details. You will need to select 'OK' to complete this configuration. You cannot change the connections string here, if required you will need to go back through the configure functionality.

Figure 39: Selecting export to SQL shows connections string set up



The connection string will display where the database is created. If required you can also use the 'Copy string' option to copy the connection string. This may be useful in the Provider Data Self-Assessment Toolkit (PDSAT).

Help and support

The DFE Support Desk is open:

- 9:00am to 5:00pm, Monday to Thursday
- 9:00am to 4:00pm, Friday
- 8:30am to 6:00pm, on ILR return days

The DFE Support Desk is closed weekends and bank holidays.

Queries can be raised out of hours by using the [Customer help portal](#).



Department
for Education

© Crown copyright 2026

This publication is licensed under the terms of the Open Government Licence v3.0, except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3.

Where we have identified any third-party copyright information, you will need to obtain permission from the copyright holders concerned.

About this publication:

enquiries www.gov.uk/contact-dfe download
www.gov.uk/government/publications

Follow us on X: [@educationgovuk](https://twitter.com/educationgovuk)

Connect with us on Facebook: facebook.com/educationgovuk