

Receiving Employer guidance Apprenticeship levy transfer process

Setting up an Apprenticeship Service account to receive Levy Transfer

August 2019 | Version 5.0

Authors:

*Jennifer Stone, Apprenticeship Relationship Manager – London & Southeast
Education & Skills Funding Agency (ESFA) | Health Education England*

*Sarah-Jane Marcello, Apprenticeship Relationship Manager – South & South West
Education & Skills Funding Agency (ESFA) | Health Education England*

Contents

1. Information you need before you start the process Page 4
2. Setting up a Government Gateway ID Page 4
3. Opening the apprenticeship service (AS) account Page 4
4. Creating the link to the organisation transferring the funding for your apprentice Page 8
5. Your Apprenticeship Service (AS) Account Page 8
6. Adding apprentices to your account Page 10
7. Senior Account Holder and Senders approval Page 11
8. Final account set-up – commence training Page 12
9. Contents of the “Manage Apprenticeship Funds” guidance Page 13

Where can I get help?

You can get help from the National Apprenticeship Service helpdesk at:

Telephone: 0800 015 0600 - Select ‘option 1’, then ‘option 2’ (Open: 8am- 10pm Monday to Sunday)

Email: helpdesk@manage-apprenticeships.service.gov.uk

Step by Step Guidance for Receiving Employer

Setting-up an Apprenticeship Service account to receive a Levy Transfer

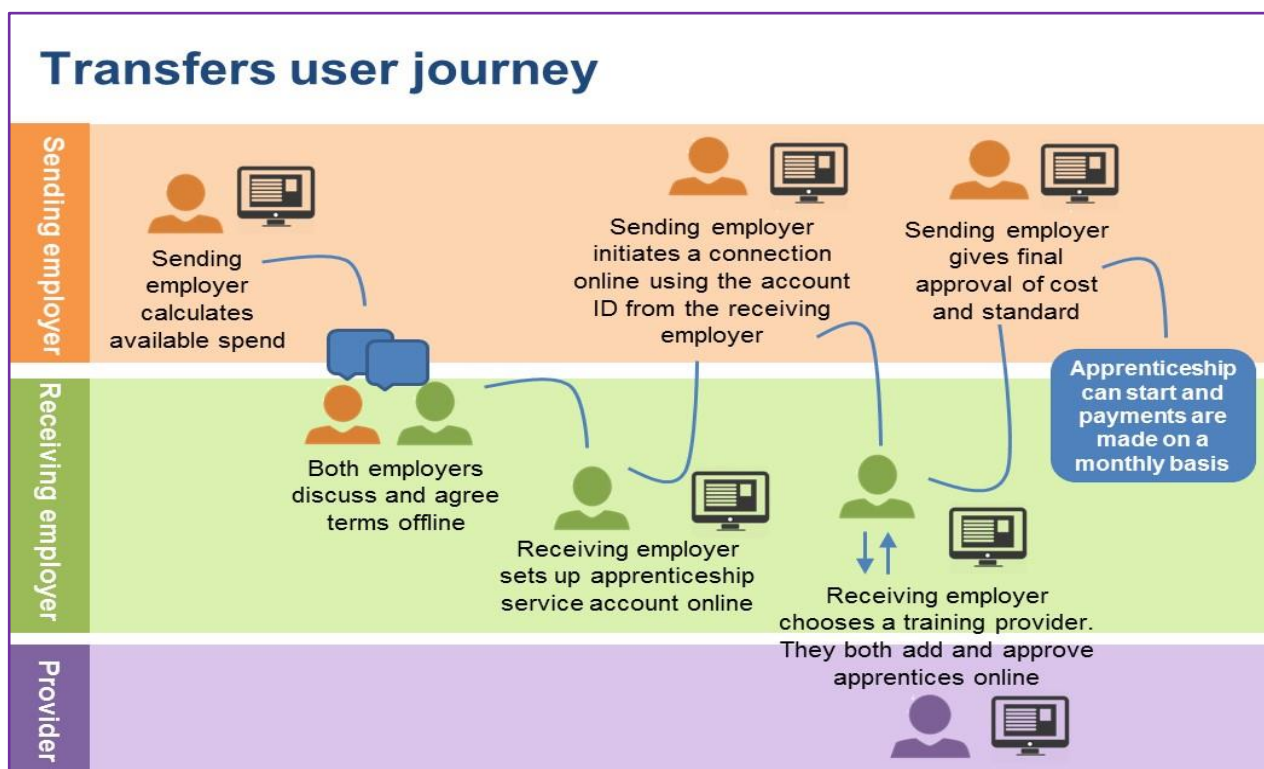
Preparation for receiving a levy transfer

As a non-levy payer, it is possible to have apprentices in your workforce as the cost of the apprenticeship training is subsidised. As a small employer, you would contribute 5% of the overall cost of training with the rest funded by the government. However, this currently limits the choice of apprenticeship training providers you can use, and therefore the choice of apprenticeships available.

There is an alternative – which is to receive the full cost of the apprenticeship training from a levy paying employer. This route means that you don't need to contribute to the cost of the training, but you will need to work with the 'sending' employer. There needs to be an agreement in place between your organisations that will allow this employer to fund your apprentice(s).

In order to benefit from a levy transfer to fund your employee's apprenticeship training, it is important to recognise that there are some important administrative steps you need to follow prior to the apprenticeship starting with the training provider. This can seem time consuming, but once the apprenticeship service account is in place and your apprentice has commenced training, there is very little to do.

The steps outlined in this guidance must be fully completed before your apprentice can start their training.



Note that this guidance is written from the "receiving employer" perspective.

1. The information you need before you start:

- The organisation's Government Gateway ID and Password.
 - This may have been set up previously to manage your organisation's tax returns and PAYE, and could be held by your Partners, Business Manager or your organisations' accountant.
 - If your organisation does not have a Gateway ID, go to step 2 in this guide
 - If your organisation already has a Gateway ID, go directly to step 3 in this guide.
- The organisation's company number or charity number
- Follow this link to find out what you need to know before setting up your apprenticeship service account: <https://sfadigital.blog.gov.uk/2019/01/24/things-you-need-before-setting-up-your-apprenticeship-service-account/>

2. Set up a Government Gateway ID if your organisation *does not* already have one:

- Locate the embedded link within the 'HMRC Services' section and select 'Get access to all HMRC online services'
 - Select 'sign in'
 - Select 'Create sign in details'
- <https://www.access.tax.service.gov.uk/login/signin/creds>

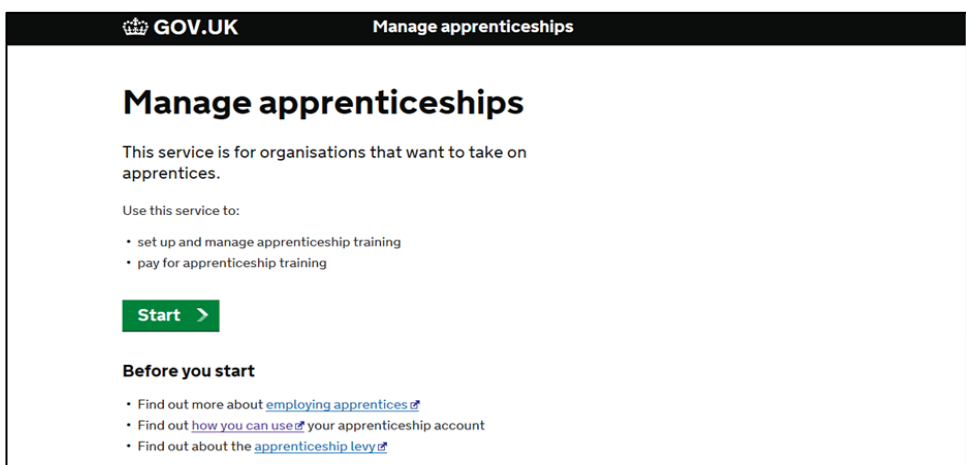
For set-up process assistance contact the HMRC Government Gateway team on:

Telephone: 0300 200 3600 - Select 'Option 3', then '1'

Online contact form: <https://www.tax.service.gov.uk/contact/contact-hmrc-unauthenticated?service=scp>

3. Open the Apprenticeship Service (AS) Account

- Use this link to open the AS account registration form:
<https://accounts.manage-apprenticeships.service.gov.uk/service/index>



- The system will prompt you throughout the process.
 - If you are setting up an 'AS' account for the first time, **select "no"**
 - If you have previously used the service, **select "yes"**

GOV.UK Manage apprenticeships

[Back](#)

Have you used this service before?

Yes, I've used this service before

No, this is my first time

[Continue](#)

- If you have any problems at this stage, you can get help from the National Apprenticeship Service helpdesk at: 0800 015 0600 or email: helpdesk@manage-apprenticeships.service.gov.uk

GOV.UK Manage apprenticeships

[Back](#)

What you'll need

To set up an account you'll need:

- at least one PAYE scheme
- the Government Gateway login details for your PAYE scheme(s) - ask your payroll department if you don't have access to this information

[Can't find your Government Gateway details?](#)

Do you have everything you need?

Yes, I have everything I need

No, I don't have everything I need

[Continue](#)

- Select the relevant option, and press continue.

Get set up as a user

First name

Last name

Email
We'll send you an email to confirm your identity.

Create new password
Password requires upper and lowercase letters, a number and at least 8 characters.

Confirm password

By continuing you accept the [terms and conditions](#).

This needs to be someone senior in the GP Practice, with decision making responsibility and the authority to sign legal agreements and contracts.

You can add more administrators at a later stage

- The system will then ask for you to complete a security check, which will be emailed to the address that you have supplied.

GOV.UK Manage apprenticeships

We've sent you an email
To confirm your identity, we've sent a code to

Confirm your identity

Enter code

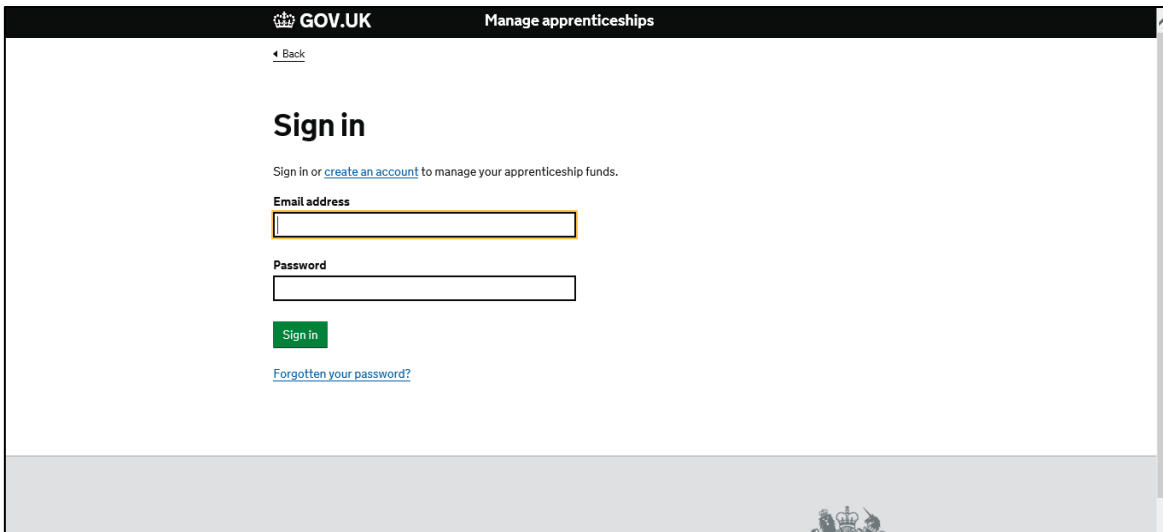
Not received an email?
[You can request another email](#)

A code will be emailed to you. Add this to verify your identity.

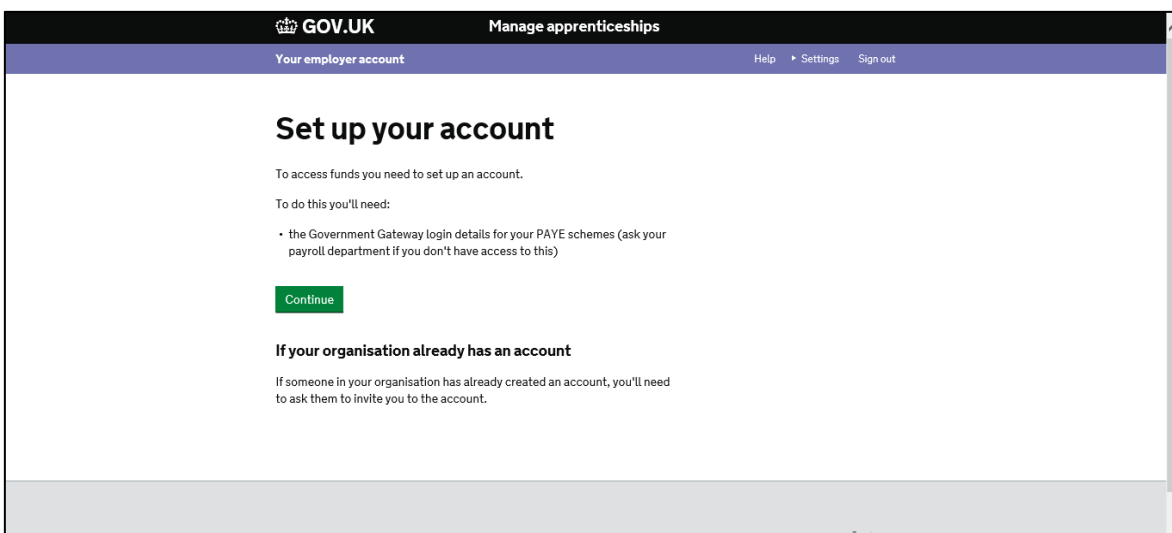
- Retain this information for future reference.
- You are now able to sign-in to the Apprenticeship Service

4. Setting up your Apprenticeship Account to receive a levy transfer

- Using the previously set up credentials, sign in to your apprenticeship service account.
- It is advisable to save this web page to the favourites within your web browser.

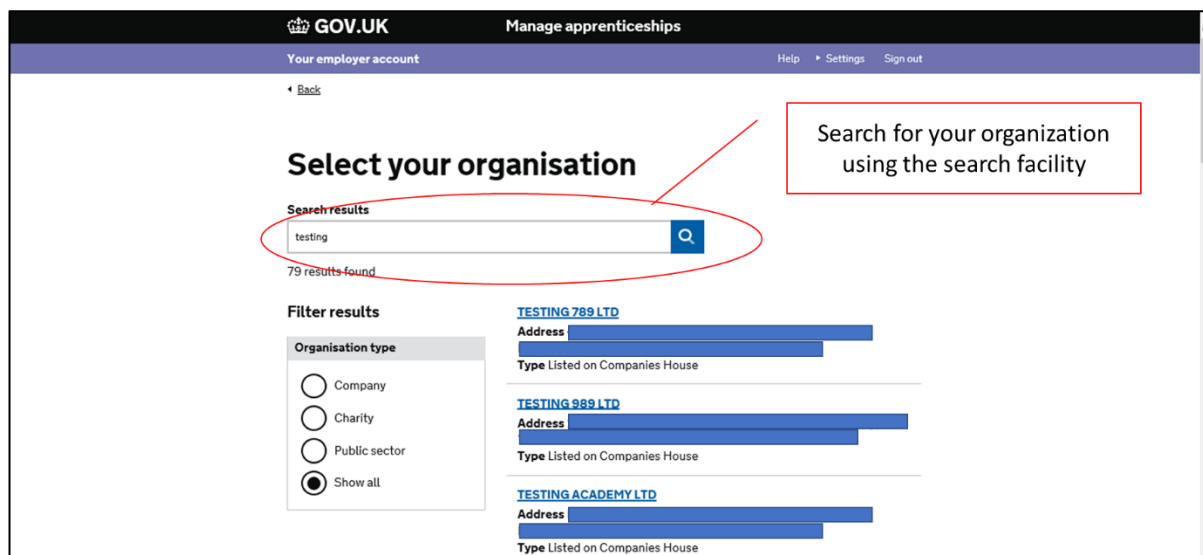


The screenshot shows the 'Sign in' page for the 'Manage apprenticeships' service on the GOV.UK website. The page has a black header with the GOV.UK logo and the text 'Manage apprenticeships'. Below the header, there is a 'Back' link. The main heading is 'Sign in'. Below this, there is a sub-heading: 'Sign in or [create an account](#) to manage your apprenticeship funds.' There are two input fields: 'Email address' and 'Password'. Below the input fields is a green 'Sign in' button. At the bottom of the form area, there is a link: '[Forgotten your password?](#)'. The footer of the page features the Royal Coat of Arms.



The screenshot shows the 'Set up your account' page for the 'Manage apprenticeships' service on the GOV.UK website. The page has a black header with the GOV.UK logo and the text 'Manage apprenticeships'. Below the header, there is a blue navigation bar with the text 'Your employer account' and links for 'Help', 'Settings', and 'Sign out'. The main heading is 'Set up your account'. Below this, there is a sub-heading: 'To access funds you need to set up an account.' There is a section titled 'To do this you'll need:' with a bullet point: '• the Government Gateway login details for your PAYE schemes (ask your payroll department if you don't have access to this)'. Below this is a green 'Continue' button. At the bottom of the page, there is a section titled 'If your organisation already has an account' with the text: 'If someone in your organisation has already created an account, you'll need to ask them to invite you to the account.'

- Enter the correct PAYE government gateway information into the apprenticeship service account.
- This will allow HMRC to verify the link to your payroll for your organisation and allow you to receive the levy transfer funding.



- Select the correct organisation. On subsequent screens it should be possible to link your Government Gateway ID to the organisation.
- When you are happy that all details have been added correctly, press continue.
- Once this form has been completed, the National Apprenticeship Service will provide you with an Apprenticeship Service (AS) unique 6-character reference number and an Account user ID to access the account.
- Keep these details safe for future reference

5. **Creating the link to the organisation who is transferring the funding for your apprentice**

NB. This step is undertaken by the organisation who will be transferring the Levy to support your apprentice. This organisation is known as the “Sending” organisation.

- You need to provide the unique 6-character AS ‘Account ID’ for your organisation to the “sending” organisation (not the account number). This is to allow them to create the link between them as a “sender” of levy funds and your organisation as a “receiver” of levy funds on your behalf. It is usually best to speak to your contact at the sending organisation so that you can work together to set up this link.
- Your Account ID can be found on the Home Page of your Apprenticeship Account.
- When the “sending” organization has created the request to link with your organization, a task will appear in the “tasks” tab on the Home Page of your apprenticeship account.
- In order to establish the link for funding to flow into your apprenticeship account, you will need to accept this request.

6. Your AS Account

The screenshot shows the 'Home' page of an AS Account. The navigation bar includes links for Home, Finance, Recruitment, Apprentices, Your team, Your organisations and agreements, and More. The main heading is 'Name of Organization' with an 'Account ID' of 'ABCDEF'. The page is divided into several sections: 'Your team', 'Your organisations and agreements', 'Apprentices', 'Training provider permissions', 'Finance', 'PAYE schemes', 'Find apprenticeship training', and 'Recruitment'. A 'Tasks' and 'Activity' tab is visible, with a message stating 'You do not have any tasks'. A 'Help us improve this service' section is at the bottom.

The unique 6-character reference for your organisation will be displayed on the Home page of your Apprenticeship Service account

The Task and Activity tabs always acts as the prompt for you to take actions and carry out next steps.

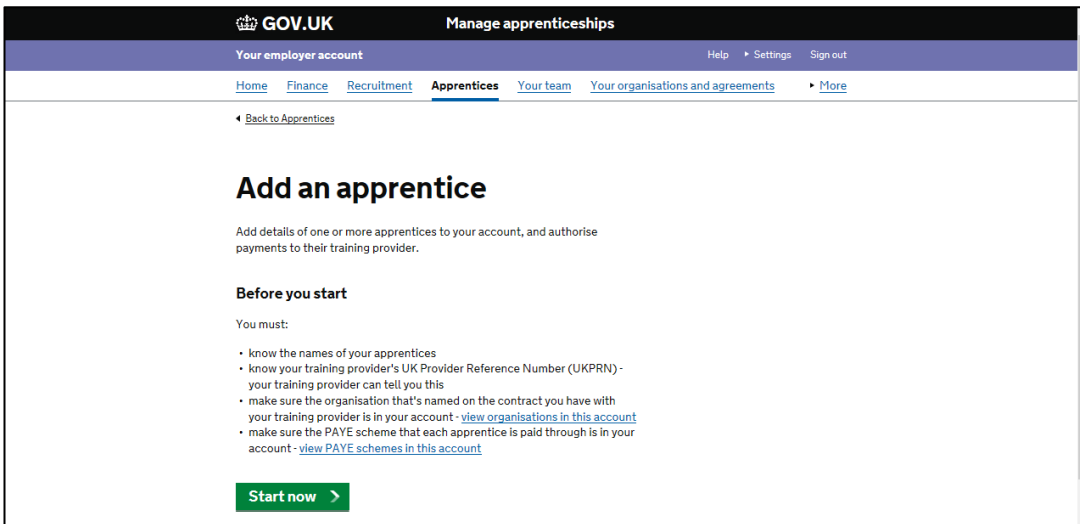
Note that it isn't always obvious what is needed, so get into the habit of checking these tabs regularly.

7. Adding your Apprentices to your Account:

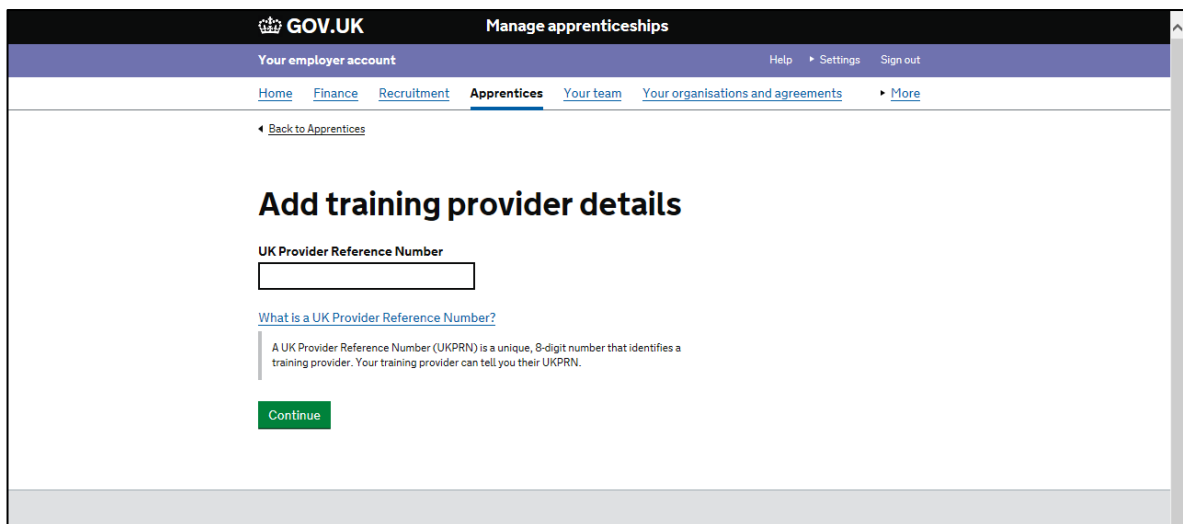
The screenshot shows the 'Manage apprenticeships' page on the GOV.UK website. The navigation bar includes links for Home, Finance, Recruitment, Apprentices, Your team, Your organisations and agreements, and More. The main heading is 'Apprentices'. The page is divided into several sections: 'Add an apprentice', 'Your cohorts', 'Manage your apprentices', 'Set payment order', and 'Report public sector'. A 'Help', 'Settings', and 'Sign out' link is visible in the top right corner.

Select the "Apprentices" tab

Open the "Add an Apprentice" link. This is where your apprentice's information will be stored



- Select the training provider.
- The training provider will be able to provide you with their UKPRN (United Kingdom Provider Reference Number).
- This is a unique code that every training provider on the official register (ROAPT) has; and is the code that allows the training provider to be paid for the training delivery.



The screenshot shows the 'Confirm training provider' page. At the top, there is a header with the GOV.UK logo and 'Manage apprenticeships'. Below this is a navigation bar with 'Your employer account' and links for 'Home', 'Finance', 'Recruitment', 'Apprentices', 'Your team', 'Your organisations and agreements', and 'More'. A breadcrumb trail shows 'Back to Apprentices'. The main heading is 'Confirm training provider'. Below this, it says 'UK Provider Reference Number [redacted] matches:'. There is a text input field for 'Training Provider Name' and another for 'UKPRN: 8-Digit UKPRN'. A question follows: 'Is this the main provider of the apprenticeship training?'. There are two radio button options: 'Yes, use [redacted]' (which is selected) and 'No, change UK Provider Reference Number'. A green 'Continue' button is at the bottom.

- Once you have confirmed the training provider, the apprentices can be added.
- You can either:
 - Add the apprentices details yourself
 - Ask the training provider to add them on your behalf

The screenshot shows the 'Start adding apprentices' page. It has the same header and navigation as the previous page. The main heading is 'Start adding apprentices'. Below this, there is explanatory text: 'You can start adding details of your apprentices or ask your training provider to add them for you. If you ask your training provider to add them, you need to check and agree the details before any payments are made.' There are two radio button options: 'I will add apprentices' and 'I would like my provider to add apprentices'. A green 'Continue' button is at the bottom.

NB it is best to contact the training provider as soon as you have added this information to ensure that they are aware that you have added in some apprentice details.

GOV.UK Manage apprenticeships

Your employer account Help Settings Sign out

Home Finance Recruitment Apprentices Your team Your organisations and agreements More

Back to Apprentices

Add apprentice details

You must add the apprentice's first and last names - fill in as many other fields as you can. You'll be able to return later to make changes or add more information.

You'll only be able to authorise payments for this apprentice once all the fields have been completed - either by yourself or your training provider.

First name

Last name

Date of birth
For example, 08 12 2001
Day Month Year

Unique learner number
This will be added by your training provider.

Apprenticeship training course
Start typing in the name of the course or choose an option from the list
Please select

Planned training start date
For example, 09 2017
Month Year

Planned training finish date
For example, 02 2019
Month Year

Your employer account Help Settings Sign out

Apprenticeship training course
Start typing in the name of the course or choose an option from the list
Please select

Planned training start date
For example, 09 2017
Month Year

Planned training finish date
For example, 02 2019
Month Year

Total agreed apprenticeship price (excluding VAT)
Enter the price, including any end-point assessment costs, in whole pounds.
For example, for £1,500 enter 1500
£

Reference (optional)
Add a reference, such as employee number or location - this won't be seen by the training provider

20 characters remaining

End-point assessments
If you've chosen an apprenticeship standard, we'll ask you to confirm the [apprenticeship assessment organisation](#) for this apprentice. We'll do this before the end of the apprenticeship.
Apprenticeship frameworks have different assessment arrangements and don't need end-point assessments.

8. Senior Account Holder and Senders approval:

- **Once the apprentice's details have been added, you will need the senior account holder to:**
 - *Agree to the contractual terms within the AS system.*
- **The 'Sending organisation' will need to:**
 - *Review and approve their financial commitment to support the apprentice via the Levy transfer.*

9. Final Account set up – commence training:

Your employer account Help Settings Sign out

Review your cohort

0 Apprentices

0 Incomplete records

£0 Total cost

Training provider: [Redacted]

Message: No message added

Status: New request

Save and continue Add an apprentice

You haven't added any apprentices yet - [add an apprentice](#)

Delete cohort

- **Once both the 'Sending organisation' and the 'Receiving organisation' have provided authorisation, the transfer is set-up and training can commence.**
- *Note that if you have more than one apprentice that will be funded by a levy transfer, you will need to repeat the "Add an Apprentice" process for each of them. This is to allow each apprentice to have a unique "Individual learner record" or ILR.*

Contents of the “Manage Apprenticeship Funds” guidance

- [1. Before setting up your apprenticeship service account](#)
- [2. Setting up multiple connected organisations in your account](#)
- [3. If you pay the apprenticeship levy](#)
- [4. How funding works if you do not pay the apprenticeship levy](#)
- [5. Apprenticeship account roles and permissions](#)
- [6. Registering on the apprenticeship service](#)
- [7. Using your account](#)
- [8. Managing cohorts and apprentices](#)
- [9. Advertising apprenticeship vacancies](#)
- [10. How payments work if you pay the apprenticeship levy](#)
- [11. Help](#)