

# Funding Reservation Guide



HEE Apprenticeship Hub

Developing people  
for health and  
healthcare

[www.hee.nhs.uk](http://www.hee.nhs.uk)

## Background

This guidance on Apprenticeship Reservations is for HEE Staff working with GP Practices, Dental Practices, or any other small employers. **You do not need to follow this process for any Apprentices based within a Trust or Levy paying organisation.**

If you lead on a project delivered via an Apprenticeship, it is highly recommended that you follow this process and complete the Reservation and Transfer Log.

If you do not complete this process, there is a risk that funding for the apprenticeship may not be forthcoming and it may mean that the organisation and the HEI or Apprenticeship Provider are at risk of not receiving payment from the ESFA.

This must be done **before** the apprenticeship starts and cannot be done retrospectively.

A draft email has been created which will provide the employers with all the information they should need (see below).

The Apprenticeship Hub will collate all reservation and transfer data so please share this log with us **monthly**, so we are able to do this in addition to processing any transfer requests that come to us via your cohorts.

If the employer requires any additional support at any point, they can contact the Apprenticeship Hub via [LevyTransfer.North@hee.nhs.uk](mailto:LevyTransfer.North@hee.nhs.uk)

## Step 1 Logging your SME Learner.

Enter your learner's details onto the Reservation and Transfer Log.

**You only need to do this for learners that are employed by a small and medium sized organisations (SMEs) like a GP practice, you do not need to do it this Trust Learners.**

## Step 2 Setting up a Digital Account.

Once a training place has been secured small employers, like GP practices, need to set up a digital account if they do not already have one. This can be done at any time and is usually a straightforward process.

Many employers have already done this, but if they have not, send them the **DAS Setup Guide**. The guide explains to employers how to set up their Digital Account, if they have any problems, they are asked to contact the Apprenticeship Hub [LevyTransfer.North@hee.nhs.uk](mailto:LevyTransfer.North@hee.nhs.uk) who will support them through the process.

## Step 3 Get Evidence that the Digital Account has been Set Up Correctly

Ask the employer to send you evidence that they have a Digital Account by sending you their **DAS Account ID and Registered Organisation Name** (as it appears in their DAS account) and input it onto the Reservations and Transfers Log.

#### Step 4 Making a Funding Reservation

Once their account has been set up the employer needs to make a funding reservation, send them the **Funding Reservation Setup Guide** which explains how to do it.

If they have any problems, they are asked to contact the Apprenticeship Hub who will support them through the process. If the employer does not confirm this with you, we recommend that you send a chase up emails at 2 months and then 1 month prior to the enrolment date.

#### Step 5 Get evidence that the Reservation has been made.

Ask the employer to send you evidence that they have made a Funding Reservation by sending you a screen shot from their system, keep this for your records and confirm you have received it on the Reservations and Transfer Log.

Please note this can only be done three months before the learner starts their Apprenticeship, it cannot be done any earlier.

#### Step 6 Levy Transfer Request

Employers may request a levy transfer, this will mean that they will receive 100%, instead of 95% of the funding for the apprenticeship.

Once the employer and yourselves have completed the above they can send the **HEE Levy Transfer EOI** form (see below) to the Apprenticeship Hub and we will seek a Transfer for them, we will enter requests onto our transfer log and let you know when/if a transfer has been found.

**We will only accept Levy Transfer Requests that are submitted to us at least 6 weeks prior to the enrolment date of the Apprentice.**

#### Next Steps

Once we have received your completed / updated Reservation and Transfer log, we will notify the relevant Training Providers so they can pick up the remainder of the reservation process, they will communicate with the employer to carry out all next steps to ensure the funding is in place.

You do not have to follow the above suggestions, but it is highly recommended that you do. If your Apprentices Funding Reservations are not correctly processed the entire funding for the Apprenticeship is highly likely to be withheld by the ESFA.

Please find a draft email explaining this process to your employer and your Apprentices below. It has all the information above within it and links to the documents and forms mentioned above. Feel free to modify this to meet your needs.



Funding for your  
Apprentice.msg



Reservation and  
Transfer Log.xlsx