

South Yorkshire Apprenticeship Hub

LEVY MATCHMAKING WEBSITE USER GUIDE

Version: 1 06/2024



This document sets out the facilitation of using the levy matchmaking website application for the South Yorkshire Apprenticeship Hub.

levymatch.southyorkshire-CA.gov.uk



**South
Yorkshire
Colleges
Partnership**

DOCUMENT REVISION HISTORY

Version	Date		Summary of main changes
1.0	01.12.2023		Initiating the User Guide
1.1	19.02.2024		Update after release 1.2

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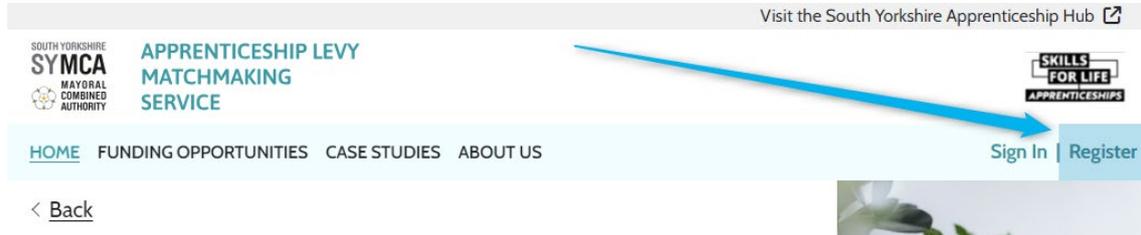
INTRODUCTION

The 'How to' User Guide contains all essential information for business users, to represent their company in matchmaking funding opportunities and apprenticeship roles. This manual includes a description of the system functions and capabilities, and step-by-step procedures for system access and use.

USER MANAGEMENT

REGISTER A COMPANY

1. Click the "Register" button on the left side of the navigation bar.



or click the "Create account" link under the authorisation form to redirect to the registration form.



2. In the "User details" section, enter information about your profile as a representative of company.

1

User Details

Name *

Surname *

Job title *

Phone number *

+44	<input type="text"/>
-----	----------------------



- In the "Login Details" section, enter your corporate email address.

Sign in details

Email address *

Enter your business email address

Password *

Requires upper and lowercase letters, a number and at least 8 characters

 [Show](#)

Confirm password *

- Create and enter a strong password for your account.
- Click the "Continue" button to proceed to the next step of account registration.
- In the second step of the registration form, enter the details of the company you represent.

Create an account

Fields marked with * must be specified.



Company details

Company name *

Company type *

Company sector (optional)

Company size *

- 1-9
- 10-49
- 50-249
- 250+

DAS account ID number (optional)



- 7. You can skip completing some of the fields, however, please note that fields marked with * are required to be filled out.

Company registration number (optional)

Is the company a Levy payer? *

Yes No

Registered office address (optional)

Website (optional)

Enter the URL to your company website start page

Company description (optional)

- 8. Please read and confirm by checking the box that you agree to the service's privacy policy.

- I have read and agree to the [Privacy Policy](#) of the platform. *
- I agree to receive marketing emails.

I'm not a robot  reCAPTCHA
[Privacy](#) - [Terms](#)

Sign up

- 9. Upon clicking “Sign up”, you will receive an email with link to confirm your account. Please click the link within the email to start using the Apprenticeship Levy Matchmaking Service.

Thank you for registering!



We've sent an email to:
youremail@yourcorporatedomain.co.uk

10. The link will redirect you to the authorisation form.

Your email has been successfully verified.
Please sign in to access the service.

Sign In

Email address

Password
 [Show](#)

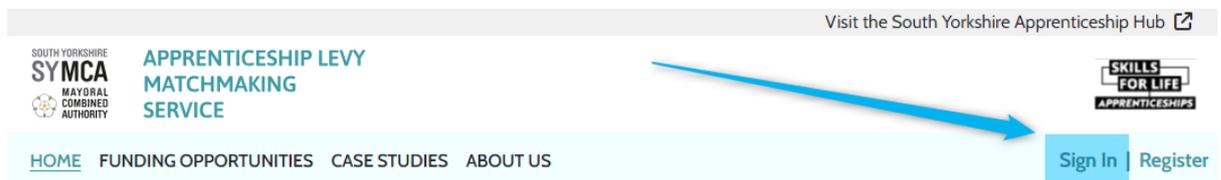
[Forgot password](#)

I'm not a robot 
reCAPTCHA
Privacy - Terms

[Sign in](#)

SIGN IN

11. Click the "Sign In" button on left side of the navigation bar.



12. Enter your credentials in the authorisation form specified during registration.

13. Click the "Sign In" button to access your account.



RESTORE ACCESS

14. In the Sign in form, click the "Forgot password?" link.

Sign In

Email address

Password

 [Show](#)

[Forgot password](#)

❗ Incorrect email or password. Please try again.

15. In the Password recovery form, enter your corporate email specified during registration.

Password recovery

Email address

I'm not a robot  reCAPTCHA
Privacy - Terms

You will soon receive an email with a password reset link

[Continue](#)

16. Click the "Continue" button to submit password recovery form.

17. You will receive an email with a link. Please follow the link from the email to continue password recovery.

We've sent an email to:
youremail@yourcorporatedomain.co.uk

18. Create and enter a new strong password for your account.

19. Click the “Set Password” button to submit the form with your new password.

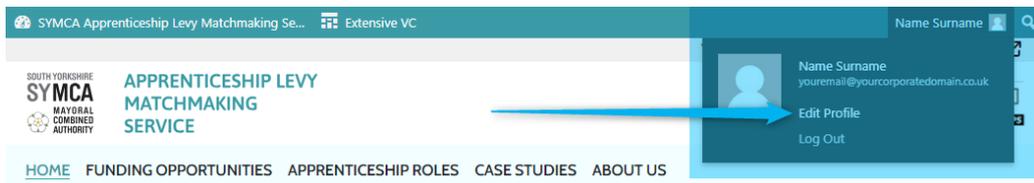
New password is set.
Please sign in using your new password.

20. You will be redirected to the authorisation form.

EDIT ACCOUNT

EDIT USER PROFILE

21. Hover over your name in the user panel in the top right corner to open the context menu.



22. Click the “Edit profile” link to redirect to the personal details form.

23. To change your email address, you should contact support.

24. After checking the accuracy of the company details, your account will be verified.

25. Click the “Save Changes” button to submit the form with your personal details as a company representative.

EDIT COMPANY DETAILS

26. Go to the “Edit profile” form to edit your company details.

SYMCA Apprenticeship Levy Matchmaking Se... Name Surname

- My Profile
- Personal Details
- Company Details
- Collapse menu

Company Details

Company Logo No file chosen
Upload your company logo. Max size 2MB. Max resolution 1000x1000.

Company name

Company type

27. Click the “Company Details” link to open form.

Company sector

Company size

DAS account ID number

28. Provide a "DAS Account ID" so other companies can offer you funding.

Company registration number

Unique tax reference

Company's registered office

Trading locations

The "Trading locations" field will be filled in automatically according to the locations of the apprenticeship roles you have created.

If you are a levy payer and want to create a Funding Opportunity post, you should fill the "Total funding available" field [as no more than 50% of your previous financial year's apprenticeship levy funds.](#)

Levy payer	Yes ▾
Total funding available	48750 GBP
Remaining funds	0 GBP

"Remaining Funds" will be calculated automatically as the difference between your available funds and the amount of required funding in your approved and accepted applicant applications.

Website	<input type="text" value="https://www.yourcorporatedomain.co.uk"/>
Company description	<input type="text" value="Welcome, your gateway to seamless solutions in wholesale and retail trade, construction, and professional, scientific, and technical services."/>
<input type="button" value="Save Changes"/>	

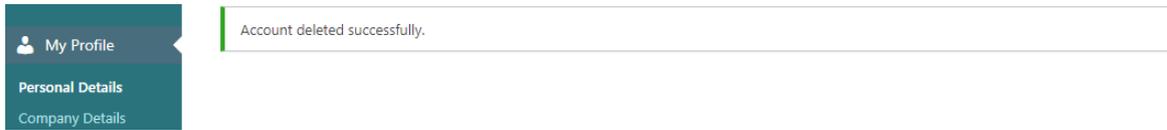
Click the "Save Changes" button to submit form with company details.

DELETE ACCOUNT

29. Go to the "Personal Details" edit form to delete your account.
30. Click the "Delete" button to delete your account on the Apprenticeship Levy Matchmaking Service website.
31. Click the "OK" button in the confirmation window to confirm that you want to delete your account.

<ul style="list-style-type: none"> My Profile Personal Details Company Details 	<p>Personal Details</p> <p>Your account and all personal data will be permanently deleted shortly. Your posts will also be unpublished.</p> <p>Name <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
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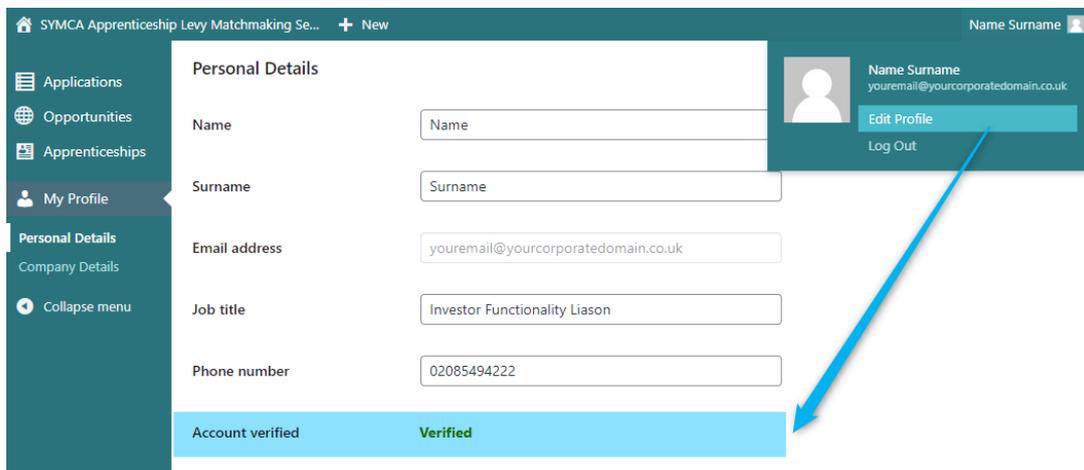
32. After deleting your account, you should be redirected to the Home Page as an unauthorised user.



POST MANAGEMENT

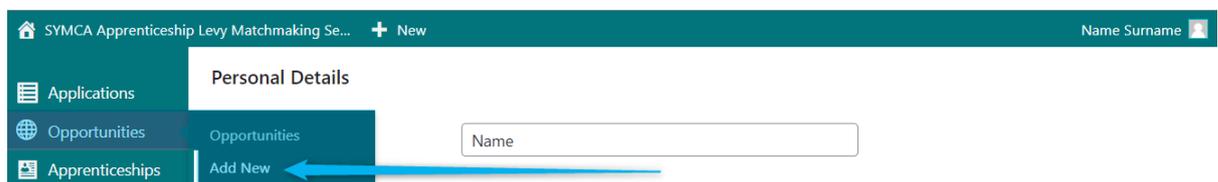
33. To create posts, your account should be verified to ensure the accuracy of the company details provided.

34. Go to the "Personal Details" section in editing your profile to check the verification status of your account.



CREATE A POST FOR FUNDING OPPORTUNITY (FOR LEVY PAYERS ONLY)

35. As an authorised and verified user, hover over the "Opportunities" section to open a submenu.



Click the "Add New" link in the section submenu to open the opportunity creation form.

Please indicate if you would like to make your company's name publicly visible in the list of posts for Funding Opportunities.

Opportunity Details

Show Company Name:

Company size to receive funding:
 Any 1-9 10-49 50-249 250+

Company Sector:
 Agriculture, environmental and animal care Business and administration

Publish

Status: Pending Review

Visibility: Public

Continue to indicate in the form the parameters of the apprenticeship and the companies you would like to offer funding opportunities to.

The "Transfer Pledge ID" field is automatically filled out and appears in the list of Funding Opportunity posts next to or instead of your company name as the title of your post.

Transfer Pledge ID:

Type of Role:

Levels:
 Level 2 Level 3 Level 4 Level 5 Level 6 Level 7

Locations:
 Barnsley Doncaster Rotherham Sheffield

Click the "Submit for Review" button to submit opportunity details form for review and publication.

Opportunities

Opportunities

Add New

Apprenticeships

My Profile

Mine (4) | Published (0) | Pending (28) | Trash (7)

Bulk actions All dates 4 items

<input type="checkbox"/>	Title	Date	Transfer Pledge ID	Location
<input type="checkbox"/>	OP656cec988f946-729 — Pending	Last Modified 2023/12/03 at 9:13 pm	OP656cec988f946	Barnsley, Doncaster, Rotherham, Sheffield

In the list of publications about funding opportunities, your post will be added in the status "Pending".

CREATE A POST FOR THE APPRENTICESHIP ROLE

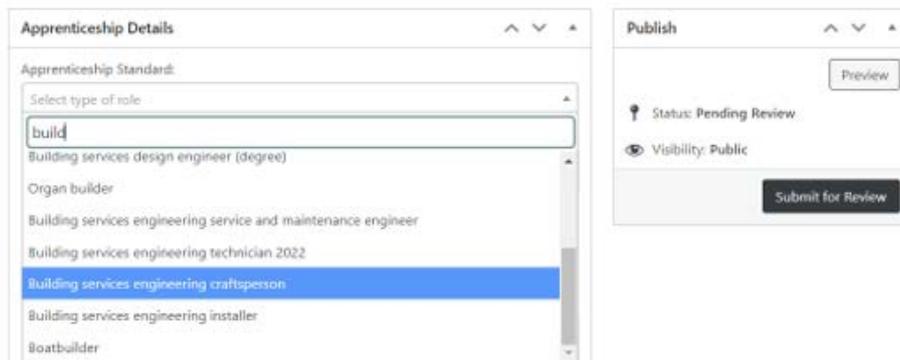
This is where you identify which apprenticeship(s) you require a transfer of levy funds for

36. As authorised and verified user, click or hover over the “Apprenticeships” section to open a submenu.

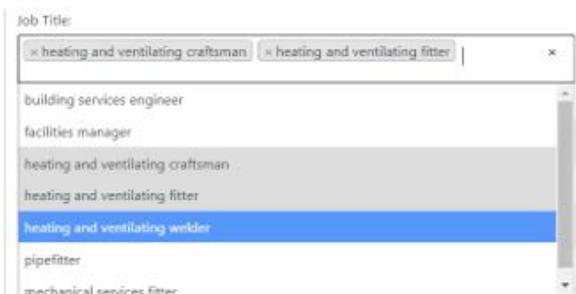


37. Click the “Add New” link in the section of submenu to open the apprenticeship creation form.

38. Please select the apprenticeship standard that requires funding for your company's role.



39. You can search and add one or more job titles for your selected apprenticeship standard.



40. You can indicate in one post that this is for several positions to calculate the required amount of funding in advance.

Maximum Funding (£):

Number of Positions:

Total Funding Required (£):

Location:

- Please select a location
- Barnsley
- Doncaster
- Rotherham
- Sheffield

41. Indicate in which location you are creating this post.

The information I have provided is truthful and accurate. I will comply with the apprenticeship funding rules, including not offering or making any payments in return for a transfer of funding.

42. Click on the checkbox to confirm your agreement with the rules for creating an Apprenticeship Role post.

43. Click the “Submit for Review” button to submit apprenticeship details form for review and publication.

Opportunities

Apprenticeships

Apprenticeships

Add New

My Profile

Collapse menu

Mine (1) | Published (0) | Pending (16)

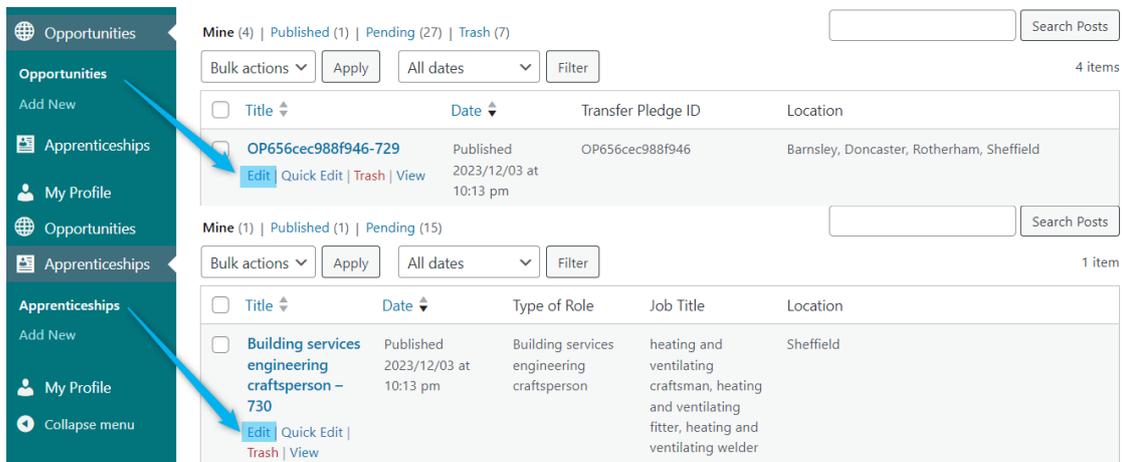
Bulk actions All dates 1 item

<input type="checkbox"/>	Title	Date	Type of Role	Job Title	Location
<input type="checkbox"/>	730 — Pending	Last Modified 2023/12/03 at 10:09 pm	Building services engineering craftsperson	heating and ventilating craftsman, heating and ventilating fitter, heating and ventilating welder	Sheffield

44. In the list of publications about funding apprenticeships, your post will be added in the status “Pending”.

EDIT A POST

45. Click the "Edit" button to go to the parameters form for this post.



46. After making changes, click the "Submit for Review" button to submit the post details form for review and publication.



47. If applications linked to the post are not completed, any subsequent modifications will result in their rejection and withdrawal.

48. In the list of publications, your post will be added in the status "Pending" and will require re-verification by the coordinator.

DELETE A POST

49. Click the "Move to trash" button to unpublish your post.

50. If applications linked to the post are not completed, it will be transferred to the rejected and withdrawn section after the deletion of the post.

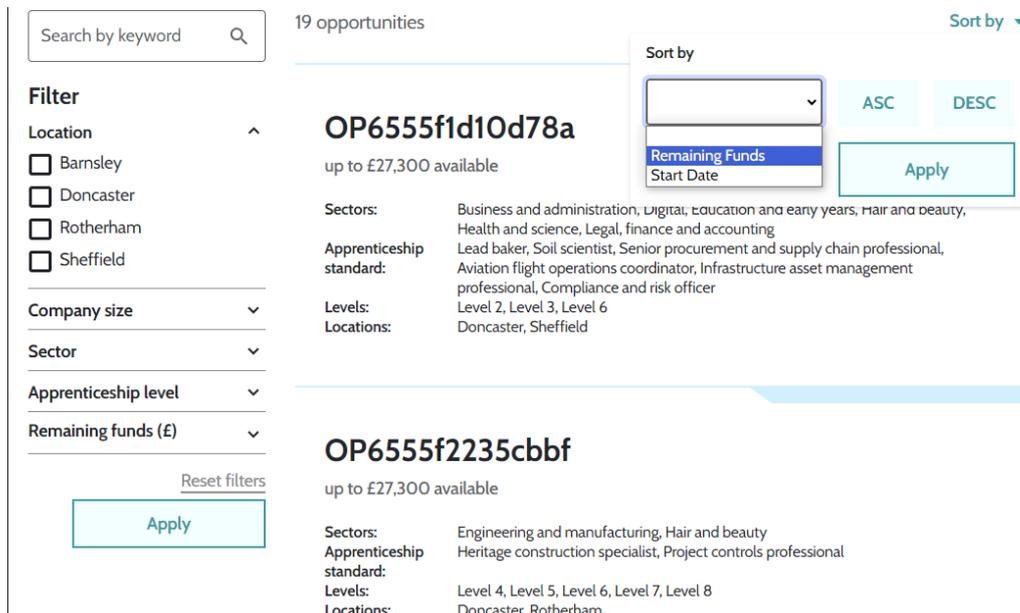
MATCHMAKING MANAGEMENT

FIND A FINANCING OPPORTUNITY

51. Click the "Funding Opportunities" button in website navigation bar.



52. Filter specifies the parameters of the desired funding opportunities.



53. Sorting indicates the rules for the order of posts.

54. Click the "Apply" button to apply filtering and sorting to the list.

55. If all the options do not fit on the screen, continue searching for the financing opportunity that suits you on another page.



56. Click on the preview card (simple title) to go to the "Details of the opportunity" page.

57. Only authorised users can view "Details of the opportunity" page.

APPLICATIONS MANAGEMENT

SUBMIT AN APPLICATION

58. Open the "Details of the opportunity" page.

< [Back](#)

OP6555f1d10d78a

Details of the opportunity

The company wants to fund apprenticeship training in:

Sectors:	Business and administration, Digital, Education and early years, Hair and beauty, Health and science, Legal, finance and accounting
Apprenticeship standard:	Lead baker, Soil scientist, Senior procurement and supply chain professional, Aviation flight operations coordinator, Infrastructure asset management professional, Compliance and risk officer
Levels:	Level 2, Level 3, Level 6
Company size:	50-249
Locations:	Doncaster, Sheffield

Remaining funding available: £27,300

[Apply for the transfer](#)

59. Click the "Apply for the transfer" button to open submission form.

60. Only verified users can submit applications.

Apprenticeship role *

v

- Space systems engineer
- Building services engineering site management (degree)
- Construction support technician
- Sales executive

[+ Create new](#)

61. In the dropdown list of apprenticeship roles, select which role you would like to apply for.

62. Click the "+ Create New" button if the item you are looking for is not available and you need to be redirected to the apprenticeship role creation form.

63. When you select a role from the list, you will see additional information about the role and matches in the opportunity.

Duration: 48 Months	Matching parameters: Level, Sector
Total funding required: £27,000	Match: 40%

64. Check the box to indicate your intention to receive funding from another company.

I want to make the above application so I can receive funding from another business for apprenticeship training *

Apply

65. Click the “Apply” button to submit your role form to the funding provider.

Thank you for submitting your levy request!

66. Your application is now being reviewed by the funding provider.

CHANGE APPLICATION STATUS

67. Visit your profile to track the progress and any updates related to your application.

Applications						
Submitted		Received				
Apprenticeship Role	Funding Opportunity	Status	Match Rate	Message	Application Time	Action
Space systems engineer	OP655f9c71cfd3d	Awaiting approval	40	Hello! We would be very pleased to cooperate with you.	2023-12-04 10:25:52	

68. As a funding provider, click on the “Received” tab to approve or reject the application.

69. You can click “Approve” even if you have already approved more applications than funds allow.

Submitted		Received				
Apprenticeship Role	Funding Opportunity	Status	Match Rate	Message	Application Time	Actions
Space systems engineer	OP655f9c71cfd3d	Awaiting approval	40	Hello! We would be very pleased to cooperate with you.	2023-12-04 10:25:52	<input type="button" value="Approve"/> <input type="button" value="Reject"/> <small>The required funding for this apprenticeship exceeds your funding budget.</small>

70. As an applicant, click on the “Submitted” tab to accept or withdraw the application.

71. You can click the “Accept” button while the funding provider still has funds available.

72. If the funding provider runs out of funds, you will not be able to accept the application.

Submitted		Received				
Apprenticeship Role	Funding Opportunity	Status	Match Rate	Message	Application Time	Action
Space systems engineer	OP655f9c71cfd3d	Awaiting acceptance by applicant	40	Hello! We would be very pleased to cooperate with you.	2023-12-04 10:25:52	<input type="button" value="Accept"/> <input type="button" value="Withdraw"/>

Submitted		Received				
Apprenticeship Role	Funding Opportunity	Status	Match Rate	Message	Application Time	Action
Space systems engineer	OP655f9c71cfd3d	Awaiting acceptance by applicant	40	Hello! We would be very pleased to cooperate with you.	2023-12-04 10:25:52	<input type="button" value="Withdraw"/> <small>Unfortunately, this fund have been exhausted.</small>

73. You can transfer levy funds to a business you know if you have their apprenticeship service account ID.

MAKE A TRANSFER TO A BUSINESS I KNOW

74. In your [apprenticeship service account](#), select 'Finance' and then 'manage transfer connections'.

Enter the other business's apprenticeship service account ID, and then wait for them to accept the transfer connection.

Then agree the apprenticeship training details and cost when they've been added to the service by the business receiving a transfer.