

LEVY TRANSFER PROCESS

Further to your recent application, a Levy Paying Organisation has confirmed they will pledge funds to cover the cost of your apprenticeship standard(s). This guide will take you through the next steps, to ensure a timely completion of the transfer process.

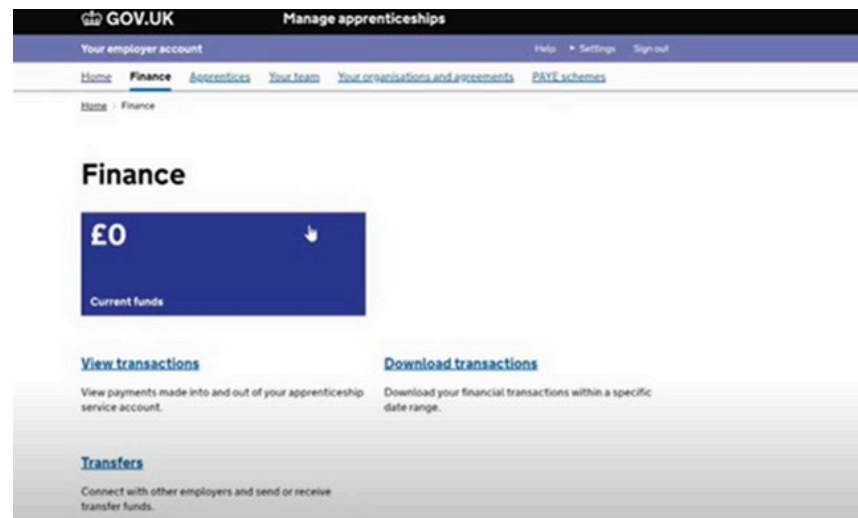
The Apprenticeship Service Account

After applying for a transfer of funds from the **South Yorkshire Apprenticeship Levy Matchmaking Service** (ALMS) all Levy Transfers take place via the online **Apprenticeship Service** (AS). This is an online system that will connect the Levy Paying Organisation, the receiving employer (you) and the chosen Training Provider.

All parties will need an AS account to successfully transfer the levy funds. If you already have an account, please log in via **Apprenticeship Service**. If you have not set up an account and would like guidance on how to set one up, check out our **Setting Up Your Apprenticeship Service Account** guide.

Step 1

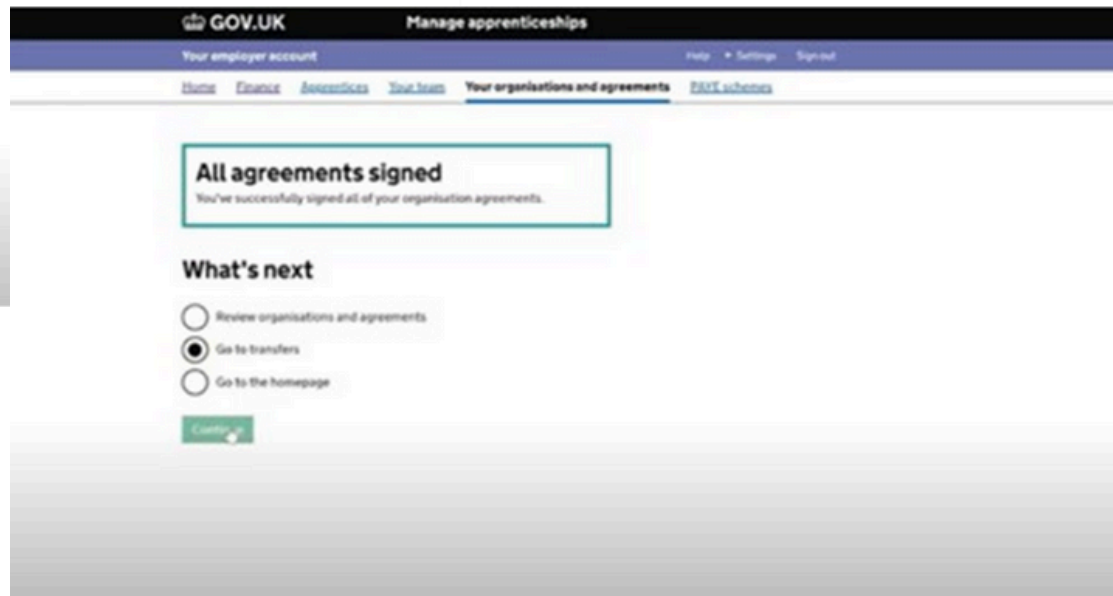
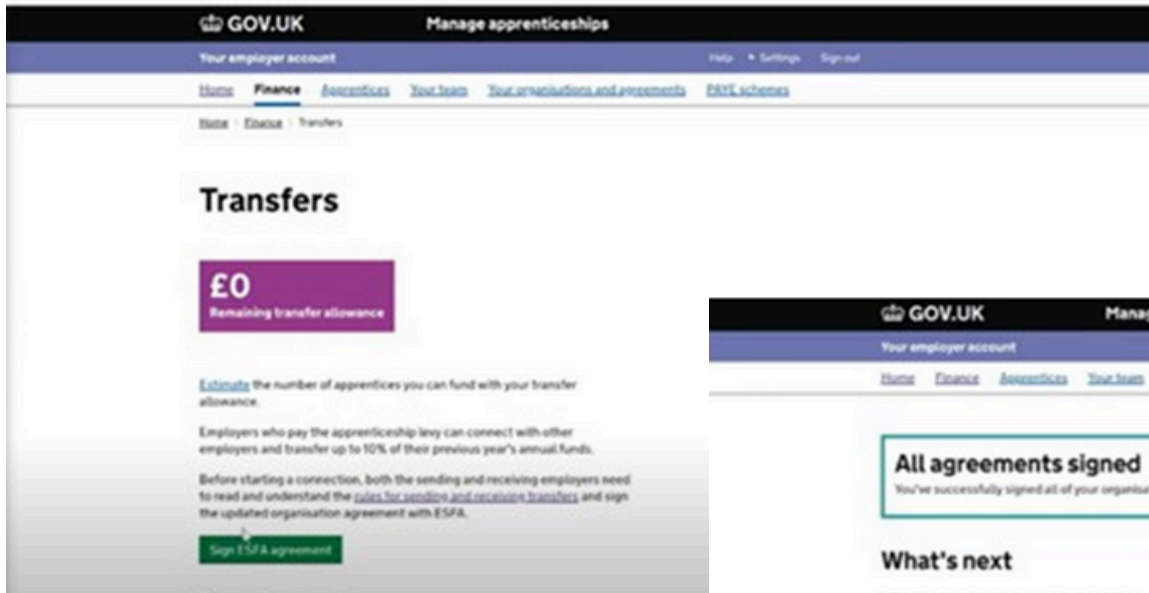
- Log into your **Apprenticeship Service Account**.
- The Levy Transferring Organisation will have sent a connection request. You will need to go to the Transfer button located within the Finance tab of your account to accept this connection



CONNECTING WITH A LEVY PAYING ORGANISATION

Step 2

- Read through the DfE agreements and then sign them where applicable
- None will appear if they are already all signed
- Once you have signed, click 'Go to transfers' for the next step



CONNECTING WITH A LEVY PAYING ORGANISATION

Step 3

- Back on the Transfers tab you will see details of the Levy Gifting Organisation within your connection requests
- Click details and then approve connection request
- You are now connected with the Levy Gifting Organisation

[Home](#) > [Finance](#) > [Transfers](#)

Transfers

Employers who pay the apprenticeship levy can connect with other employers and transfer up to 25% of their previous year's annual funds.

Before starting a connection both the sending and receiving employers need to read and understand the [rules for sending and receiving transfers](#).

Only the sending employer can start a connection.

Connection requests

Employers you are connecting with to send funds to

You have no pending or approved requests

Employers you are connecting with to receive funds from

You have no pending or approved requests

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Connection request details

ESFA Transfer Sender wants to connect with you. Once you accept the connection request you'll be able to request transfer funds from this employer.

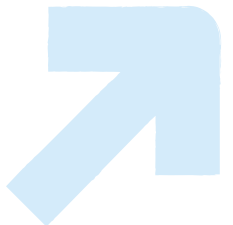
Account name	ESFA Transfer Sender
Account ID	FKKBPV
Status	Pending

Do you want to approve this connection request?

Yes, approve the request

No, reject the request

[Connect](#)



GRANTING YOUR TRAINING PROVIDER PERMISSIONS

Step 1

- Now that you have connected to the Levy Gifting Organisation, you will need to connect with your chosen training provider and grant them permissions to add apprentices on your behalf
- On the home page, scroll until you find the 'Your training providers' link

Apprenticeships

Manage your apprentices, advertise apprenticeships and set training provider permissions

Apprentices

Add apprentices, update details of existing apprentices, change training providers and authorise payments to training providers.

Your apprenticeship adverts

Create adverts to post on find an apprenticeship, view applications, your previous adverts and adverts created by training providers.

Your training providers

Add training providers and manage permissions to choose what they can do on your behalf.

Find apprenticeship training

Search for apprenticeships and see details of approved providers who can deliver the training.



GRANTING YOUR TRAINING PROVIDER PERMISSIONS

Step 2

- Your training provider should have already been added
- You can then grant them permission to add apprentice details on your behalf
- If your chosen training provider is not listed, they need to be added by using their UKPRN number. Please contact them for this information

Add apprentice records

This allows your training provider to add apprentice records. If you do not pay the levy, this permission also allows your training provider to reserve funding.

- Allow
- Do not allow

Step 3

- Complete your connection with the training provider by clicking 'Add an apprentice'

Add an apprentice

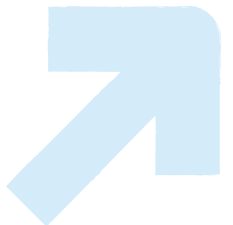
Add details of one or more apprentices to your account, and authorise payments to their training provider.

Before you start

You must:

- know the names of your apprentices
- know your training provider's UK Provider Reference Number (UKPRN) - your training provider can tell you this
- make sure the organisation that's named on the contract you have with your training provider is in your account - [view organisations in this account](#)
- make sure the PAYE scheme that each apprentice is paid through is in your account - [view PAYE schemes in this account](#)

Start now >



ADDING AN APPRENTICE

Step 2

- ‘Do you want to use transfer funds to pay for this training? Select “Yes” and the confirmed Levy Gifting Organisation you connected with should appear
- Add your chosen training provider and click “confirm”
- You can now add details of the apprentice or select ‘I would like provider to add apprentices’ to allow for your chosen training provider to add apprentice details
- Anything added by the training provider will go back to you for final approval

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Do you want to use transfer funds to pay for this training?

Yes, I will use transfer funds from ESFA Demonstration

No, I don't want to use transfer funds

[Continue](#)

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Add training provider details

UK Provider Reference Number

[What is a UK Provider Reference Number?](#)

[Continue](#)

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Start adding apprentices

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.

I will add apprentices

I would like my provider to add apprentices

[Continue](#)

