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National  
Apprenticeship  
Service



# The Apprenticeship Service Guide

How to set up your Apprenticeship Service Account

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# Setting up your Apprenticeship Service Account

This guide will support you to set up your own Apprenticeship Service account and is suitable for both levy paying employers and SMEs. Once your account is set up, you will have more control of the way your apprenticeships are run and funded including:

- Reserve and manage your apprenticeship funding
- Receive and manage the new apprenticeship incentives
- Set permissions for your training provider to complete tasks on your behalf
- Find out what other apprenticeship standards are available for other parts of your business
- Select an appropriate End Point Assessment organisation
- Create and advertise an apprenticeship vacancy
- Give real-time feedback on the quality of training provision you receive

**To get your Apprenticeship Service account up and running, you need to follow these simple steps:**

1. Create a user account using your name and a valid email address
2. Add a Pay as You Earn (PAYE) scheme on behalf of your organisation
3. Confirm your organisation details
4. Accept the employer agreement with the Education and Skills Funding Agency (ESFA)

**Key information you need before you start to register**

- A valid email address
- The Government Gateway login details (user ID and password) for your organisation - your payroll or finance department should have your organisation's Government Gateway details
- If your annual pay bill is less than £3 million, you can use the accounts office reference number and employer PAYE scheme reference number
- Authority to add PAYE schemes to the account
- Authority to accept the employer agreement on behalf of your organisation

For further information and guidance, please follow the video link below:

**Video:** [What you need to set up an apprenticeship service account.](#)

**Timescales for registering apprentices**

To ensure that everything runs smoothly for your apprentice, it is important that you complete the process on the Apprenticeship Service account within the following timescales:

- Register the apprentice with your account within 14 days of the apprenticeship start date
- Approve the apprentice within 30 days of the apprenticeship start date

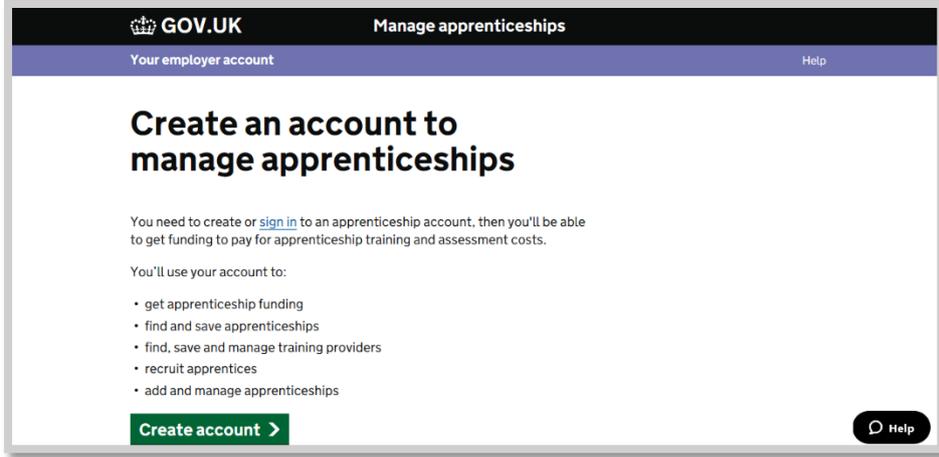
**Allocating access and account roles**

Before registering your account you also need to consider who you want to allocate access to and if required, give named individuals permission to:

- Approve apprentice and apprenticeship data
- Approve costs for training which are agreed with the training provider and sending employer
- Reconcile payments to and coming from training providers
- Sign the agreement with the Education and Skills Funding Agency (ESFA)

## STAGE 1: Registering your organisation on the Apprenticeship Service

If you have all the relevant information required (Government Gateway login details and Companies House registration number) you can set up as a new user on the Apprenticeship Service [here](#).

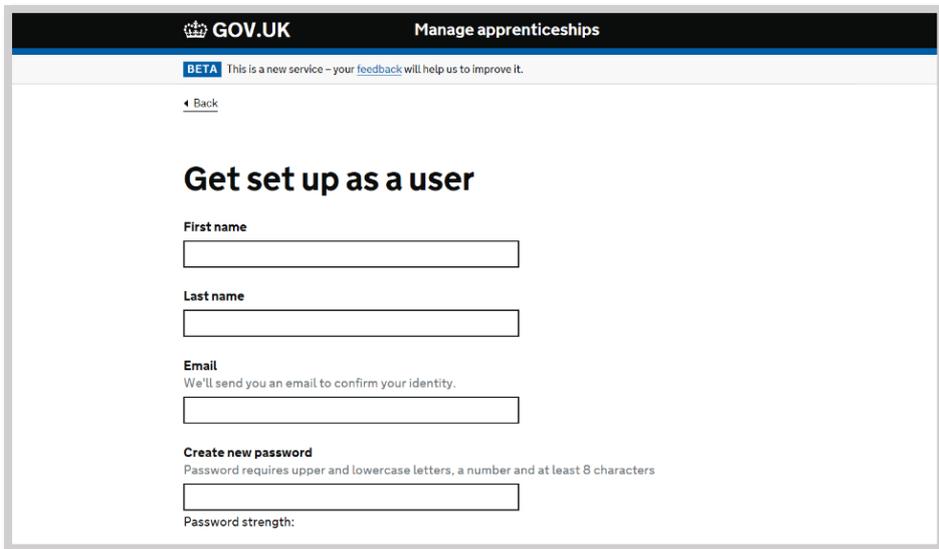


For step by step instructions to set up your account please see the links below:

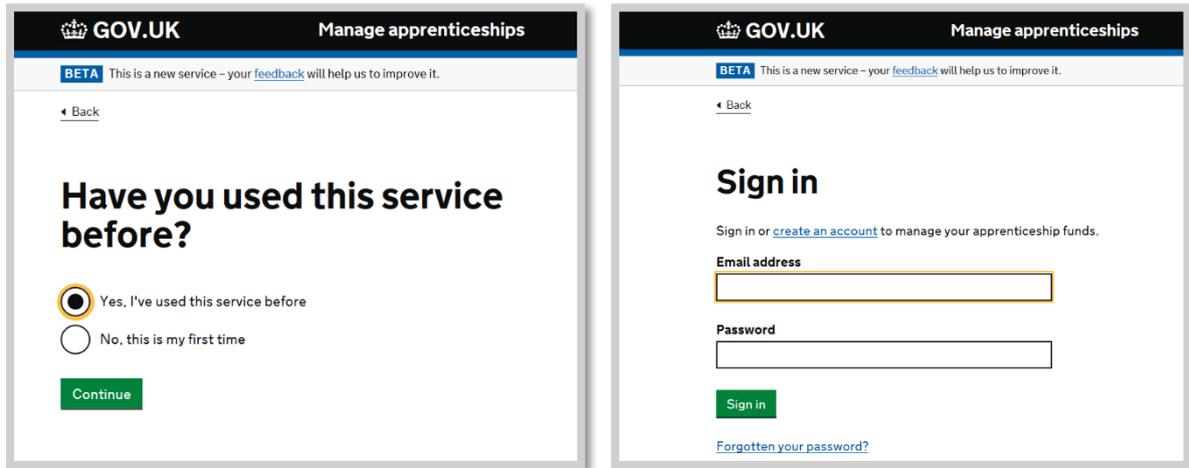
**Video:** [Register an Apprenticeship Service account](#)

**Guide:** [How to register and use the Apprenticeship Service as an employer](#)

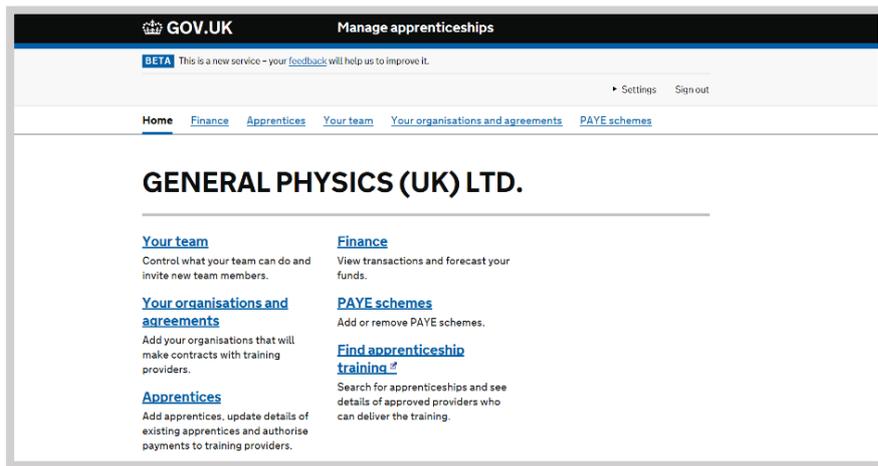
Start the registration process by getting set up as a user.



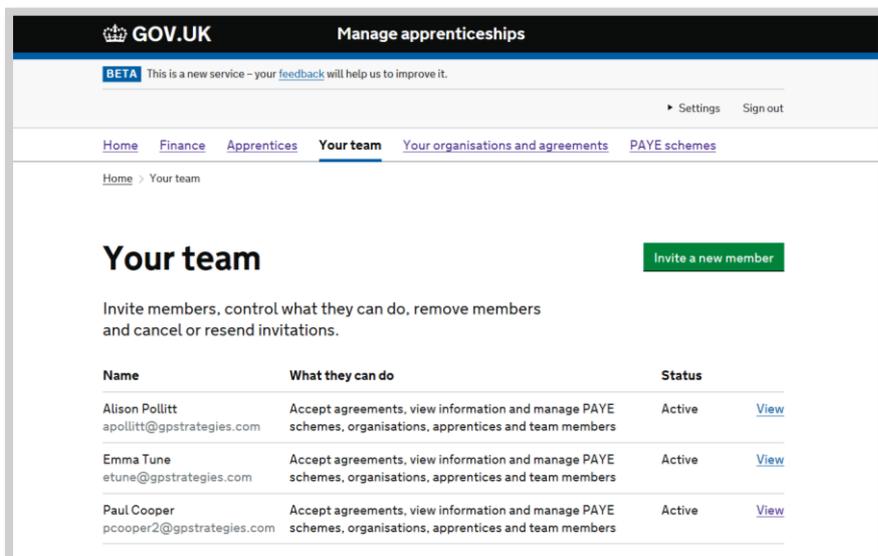
If your organisation has already registered, please enter your email and password.



Once you have signed in you will be presented with a screen similar to the one below with details specific to your organisation. From here you can navigate through your apprenticeships account.



You can add and view members of your team.



If your company is made up of connected groups you can add each organisation as required.

The screenshot shows the 'Manage apprenticeships' page on the GOV.UK website. The page title is 'Your organisations and agreements'. There is a green button labeled 'Add new organisation'. Below this, there is a table with columns for 'Organisation', 'Agreement', and 'Spending status'. The table contains one entry for 'GENERAL PHYSICS (UK) LTD.' with an agreement signed by Alison Pollitt on 11/05/2017, and a 'Spending enabled' status. A 'View' link is present at the end of the row.

Organisation	Agreement	Spending status
GENERAL PHYSICS (UK) LTD.	Signed by Alison Pollitt Signed on: 11/05/2017	Spending enabled

You must sign the agreement to allow apprenticeship funds to be used.

The screenshot shows the 'Your ESFA agreement' page for 'GENERAL PHYSICS (UK) LTD.'. The page title is 'Your ESFA agreement'. Below the title, there is a section for 'Parties' which lists the 'THE SECRETARY OF STATE FOR EDUCATION ACTING THROUGH THE EDUCATION AND SKILLS FUNDING AGENCY AN EXECUTIVE AGENCY OF THE DEPARTMENT FOR EDUCATION' with their address: 'Cheylesmore House, Quinton Road, Coventry'.

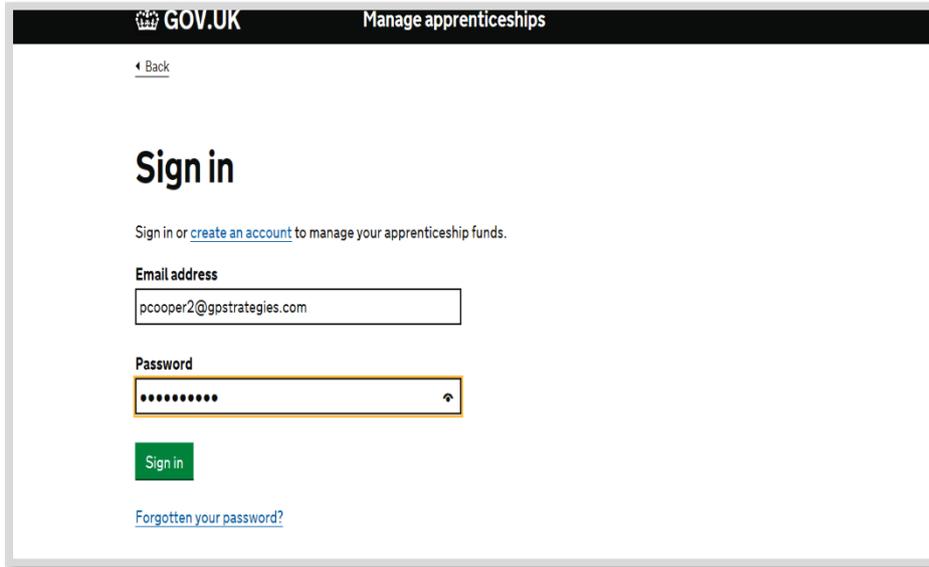
Once funds have entered your account, you will be able to review your transactions.

The screenshot shows the 'Your transactions' page on the GOV.UK website. The page title is 'Your transactions'. Below the title, there is a message: 'No funds will be paid into your account until May 2017.' Below this, there is a message in a box: 'No transaction data exists for this account, please try again later.'

## Setting permissions for your training provider

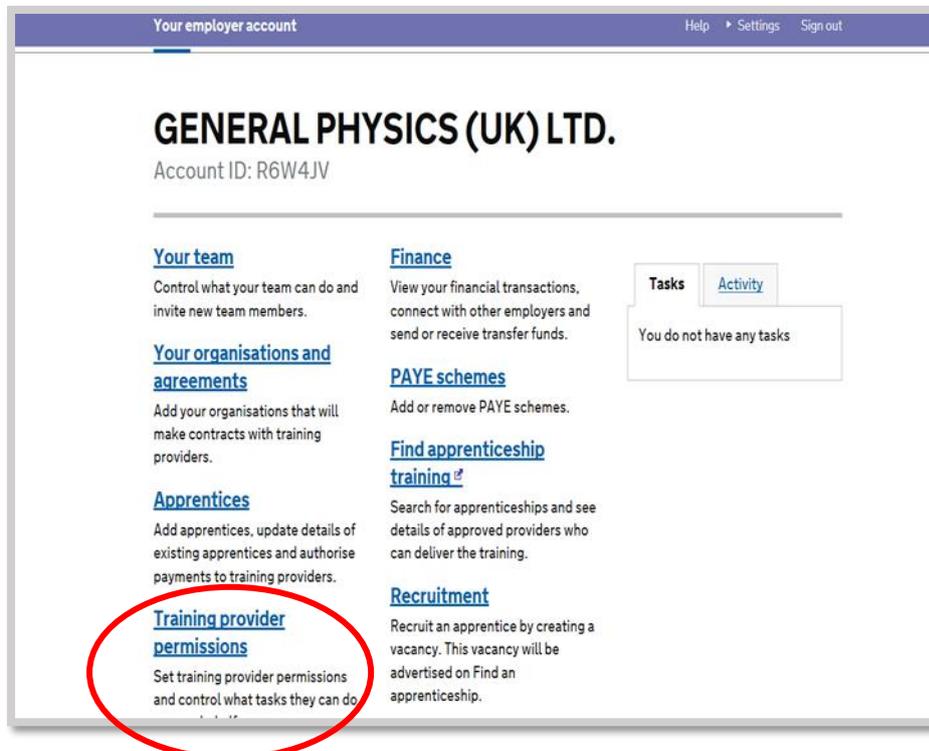
You can [add your training provider to your apprenticeship service account](#) using their name or UK provider reference number (UKPRN) and give them permission to manage tasks such as reserve funding (for employers with a wage bill under £3 million), add apprentice records and create new vacancies. Please note, final employer approval is required for all tasks.

To add your training provider, sign into your apprenticeship service account.



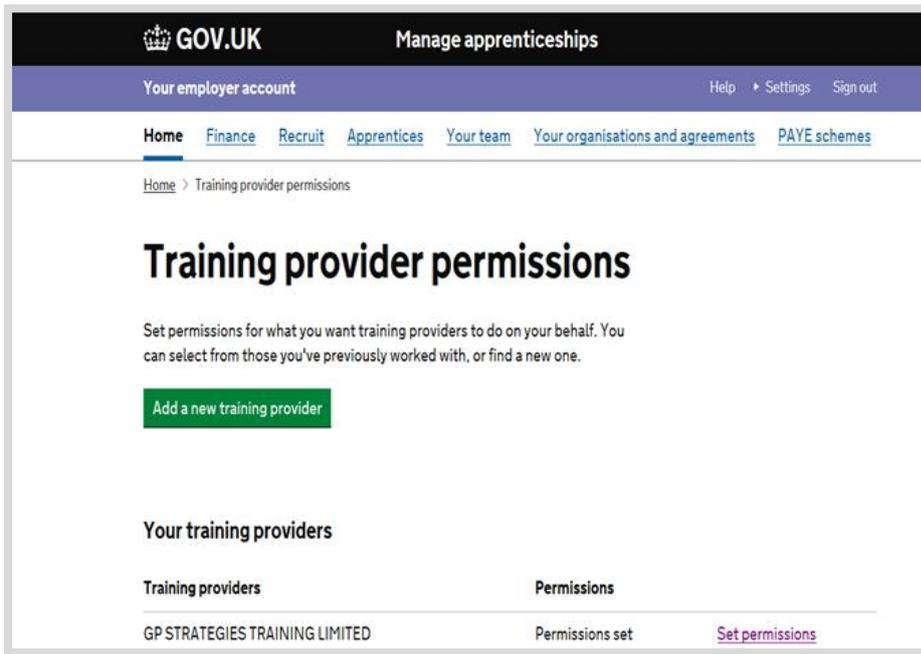
The screenshot shows the 'Manage apprenticeships' sign-in page on the GOV.UK website. At the top, there is a 'GOV.UK' logo and the page title 'Manage apprenticeships'. Below the title is a 'Back' link. The main heading is 'Sign in'. A sub-heading reads 'Sign in or [create an account](#) to manage your apprenticeship funds.' There are two input fields: 'Email address' containing 'pcooper2@gpstrategies.com' and 'Password' with masked characters. A green 'Sign in' button is located below the password field. At the bottom left, there is a link for 'Forgotten your password?'.

From the home page, select **Training provider permissions**.

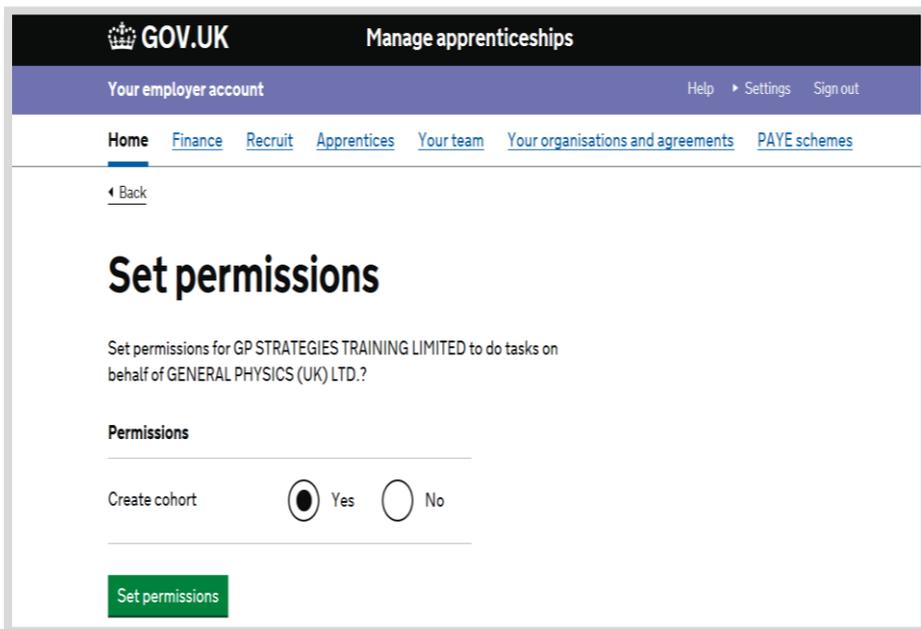


The screenshot shows the 'Your employer account' dashboard for 'GENERAL PHYSICS (UK) LTD.' with account ID 'R6W4JV'. The dashboard has a top navigation bar with 'Help', 'Settings', and 'Sign out'. The main content area is divided into several sections: 'Your team', 'Your organisations and agreements', 'Apprentices', 'Training provider permissions' (circled in red), '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'.

If the provider name is not showing the employer will need to add GP Strategies.



Select **yes** to create a cohort and then **set permissions**.



## STAGE 2: Reserving apprenticeship funding for a new start

### Reserving apprenticeship funding: Background

- Mandatory for all non-levy apprenticeship starts managed through the apprenticeship service
- Funding is only available where a reservation has been made
- Can only be made against apprenticeship standards
- Not required for transfer funded apprenticeships
- Employers can delegate the data entry to their training provider
- Employers can use their reservations with different providers if they choose

Employers can grant the provider the permission to reserve apprenticeship funding on their behalf via the 'Provider Permissions' section on their account.

### What is needed to reserve funding?

#### Information required to reserve funding

- The apprenticeship expected start month
- Apprenticeship Standard

The screenshot shows the 'Manage apprenticeships' page on GOV.UK. The main heading is 'When will the apprentice start their apprenticeship training?'. Below this, a note states: 'The apprentice can start their apprenticeship training anytime in the month you choose, or the following 2 months.' There are three radio button options: 'January 2020', 'February 2020', and 'March 2020'. At the bottom of the form is a green 'Save and continue' button.

## STAGE 3: Adding an apprentice to The Apprenticeship Service

### Adding apprentice details

A full apprentice record needs to be created to enable provider payments



GOV.UK Manage apprenticeships

Your employer account Help Settings Sign out

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## ESFA Demo

Account ID: BPJGXV

**Your team**  
Control what your team can do and invite new team members.

**Your organisations and agreements**  
Add your organisations that will make contracts with training providers.

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

**Finance**  
View your financial transactions, connect with other employers and send or receive transfer funds.

**PAYE schemes**  
Add or remove PAYE schemes.

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

**Tasks**

You do not have any tasks

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[Take the survey](#)

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GOV.UK Manage apprenticeships

Your employer account Help Settings Sign out

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Home > Apprentices

## Apprentices

**Add an apprentice**

Add apprentices to a new cohort or ask your training provider to add them.

**Your cohorts**

Review, edit, approve and add more apprentices to cohorts you've already started.

**Manage your apprentices**

View approved apprentices, update details of existing apprentices or stop and pause payments to training providers.

**Set payment order**

View and change the order in which your providers are paid from your available funds.

GOV.UK Manage apprenticeships

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[Back to Apprentices](#)

## 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](#) >

GOV.UK Manage apprenticeships

Your employer account Help Settings Sign out

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[Back to Apprentices](#)

## Choose organisation

Which organisation is named on the contract with the training provider for the apprentices you'd like to add?

ESFA 1

ESFA 2

ESFA 3

ESFA 4

[What is a contract for services?](#)

[Continue](#)

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## Add training provider details

UK Provider Reference Number

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

[Continue](#)

Please note: The UKPRN for GP Strategies Training Limited is **10036952**

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## Confirm training provider

UK Provider Reference Number '10022856' matches:

### A Training Provider

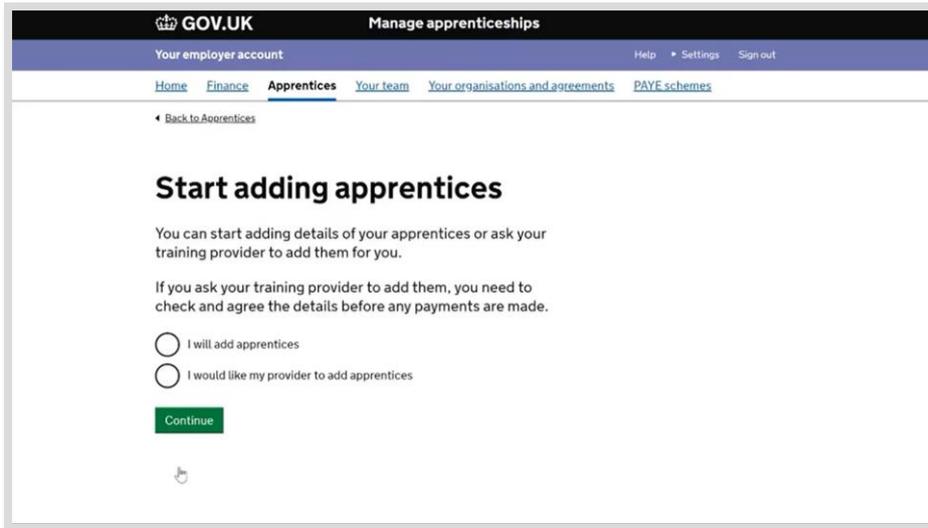
UKPRN: 10022856

Is this the main provider of the apprenticeship training?

A Training Provider

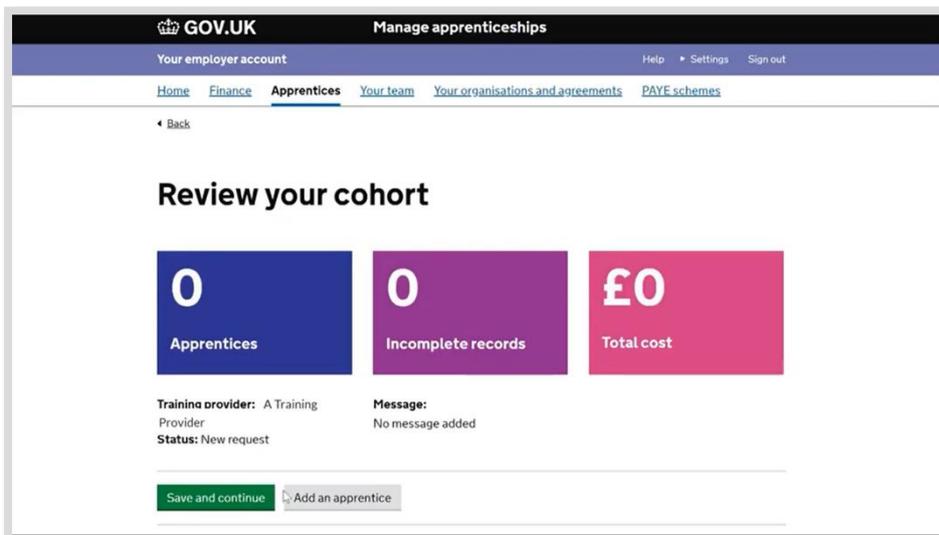
No, change UK Provider Reference Number

[Continue](#)



We would recommend you give us permission to add your apprentices, by selecting **I would like my provider to add apprentices**.

If you choose to add the details yourself, you can do so by starting to create a cohort. See instructions below.



If you don't know all the details, fill in what you can. As a minimum you will need to add the **apprentices name** and **date of birth**.

You may also be able to add information such as - the estimated start month of the apprenticeship, and the name of the apprenticeship standard they will be working towards.

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## 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

Your employer account Help Settings Sign out

**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

**End-point assessments**  
 If you've chosen an apprenticeship standard, we'll ask you to confirm the [apprentice assessment organisation](#) for this apprentice. We'll do this before the end of the apprenticeship.

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**Warnings for your attention**  
[Cost for Advanced Carpentry and Joinery, Level: 3 \(Standard\)](#)

## Review your cohort

# 1

Apprentice

# 0

Incomplete records

# £20,000

Total cost

**Training provider:** A Training Provider  
**Status:** New request

**Message:** No message added

Your employer account Help Settings Sign out

No message added

Status: New request

[Save and continue](#) [Add an apprentice](#)

---

**1 x Advanced Carpentry and Joinery, Level: 3 (Standard)**

Training code: 240

**1 apprenticeship above funding band maximum**  
 The costs are above the £9,000 maximum value of the funding band for this apprenticeship. You'll need to pay the difference directly to the training provider - this can't be funded from your account.

Name	Unique learner number	Date of birth	Training dates	Cost
Bob Smith	-	1 Jan 2000	June 2018 to October 2019	£20,000 <a href="#">Edit</a>

[Delete cohort](#)

Your employer account Help Settings Sign out

No message added

Status: New request

[Save and continue](#) [Add an apprentice](#)

---

**1 x Advanced Carpentry and Joinery, Level: 3 (Standard)**

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[Delete cohort](#)

**GOV.UK** Manage apprenticeships

Your employer account Help Settings Sign out

[Home](#) [Finance](#) [Apprentices](#) [Your team](#) [Your organisations and agreements](#) [PAYE schemes](#)

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## Choose an option

Approve and send to training provider  
 Send to training provider to review or add details  
 Save but don't send to training provider

[Continue](#) [Cancel](#)

GOV.UK Manage apprenticeships

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## Choose an option

Approve and send to training provider  
 Send to training provider to review or add details  
 Save but don't send to training provider

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## Message for your training provider

Let A Training Provider know what you'd like them to do next.

**Message (optional)**

Please approve

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## Cohort approved and sent to training provider

Cohort reference	V9GBYV
Sent to	A Training Provider
On behalf of	ESFA 1
Message	Please approve

**What happens next?**

Your training provider will review your cohort and either confirm the information is correct or contact you to suggest changes.

[Return to Your cohorts](#)

GOV.UK Manage apprenticeships

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## ESFA Demo

Account ID: BPJGXV

**Your team**  
Control what your team can do and invite new team members.

**Your organisations and agreements**  
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**Find apprenticeship training**  
Search for apprenticeships and see details of approved providers who can deliver the training.

**Tasks**

You do not have any tasks

**Help us improve this service**

Take our 3 minute survey so that we can improve this service.

[Take the survey](#)

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**Set payment order**

View and change the order in which your providers are paid from your available funds.

GOV.UK Manage apprenticeships

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## Manage your apprentices

Search for an apprentice

Enter a name

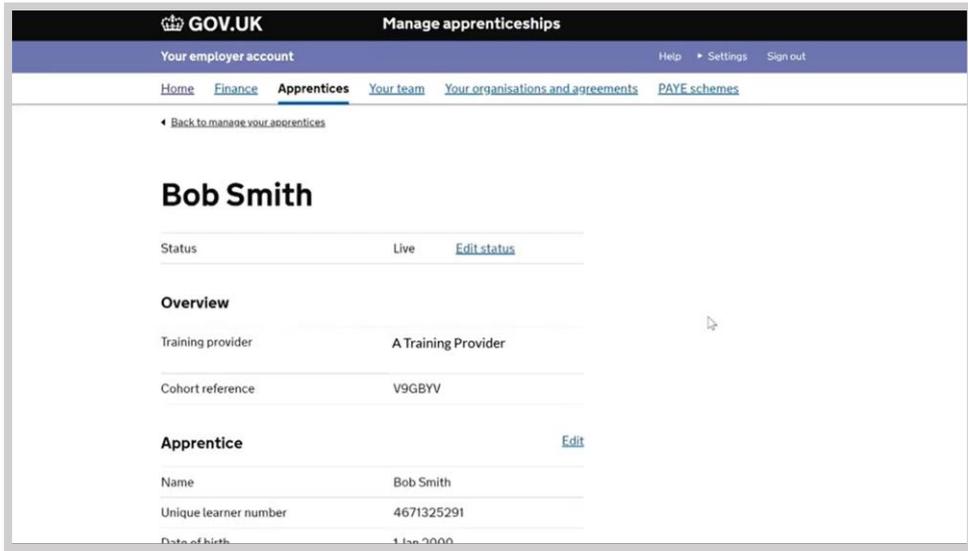
Filter apprentices

**Status** ▲

Live

Stopped

Name	Unique learner number	Date of birth	Status	Alerts
Alan Barker	1122334455	1 Dec 1980	Live	<a href="#">View</a>
April Kennedy	1116512585	6 Jun 2000	Stopped	<a href="#">View</a>
Bob Smith	4671325291	1 Jan 2000	Live	<a href="#">View</a>

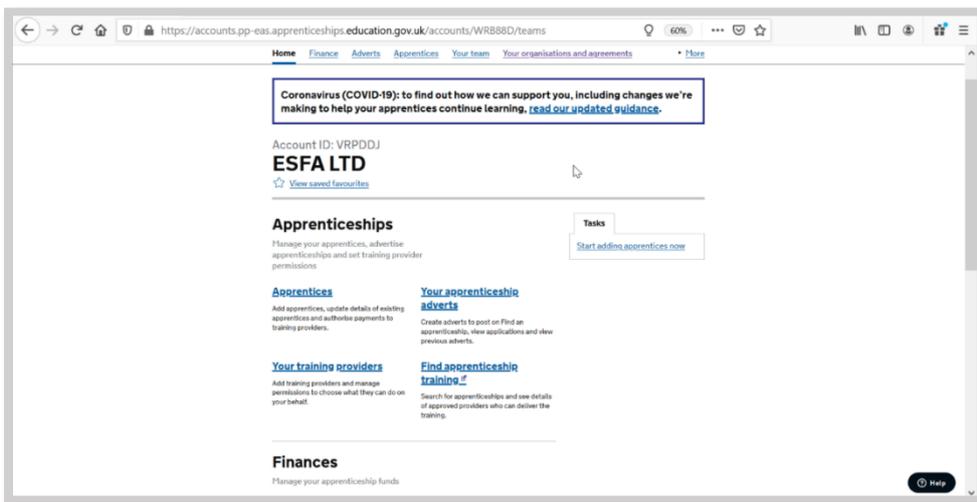


## STAGE 4: How to apply for an incentive payment for hiring a new apprentice

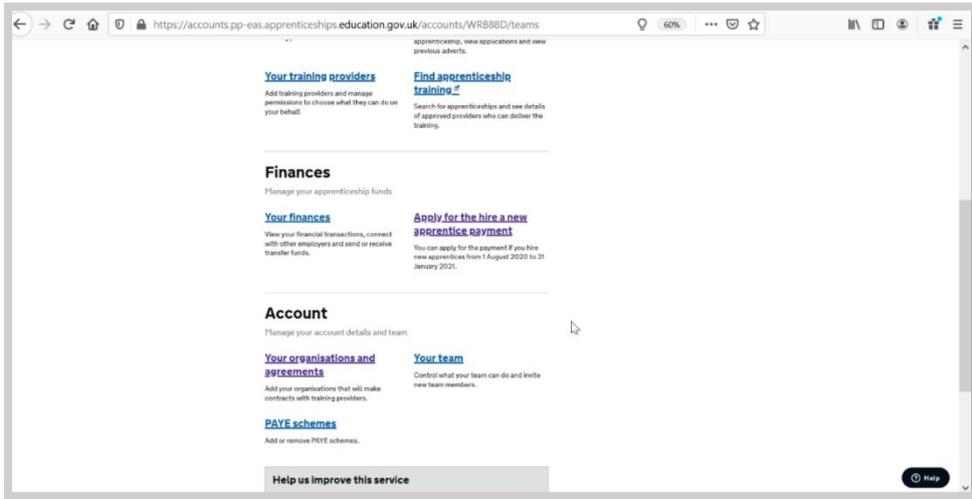
**NOTE:** This is for all apprentice new hires with a contract and apprenticeship start date between 1<sup>st</sup> August 2020 and 31<sup>st</sup> January 2021.

- Incentive payments can be made retrospectively but MUST be made by the 30<sup>th</sup> April 2021.
- Before you can move forward with this, you need to make sure you have signed the most up to date Apprenticeship Service declaration.
- Only you the employer can make the application for the apprenticeship incentive. We as the training provider cannot do this on your behalf.

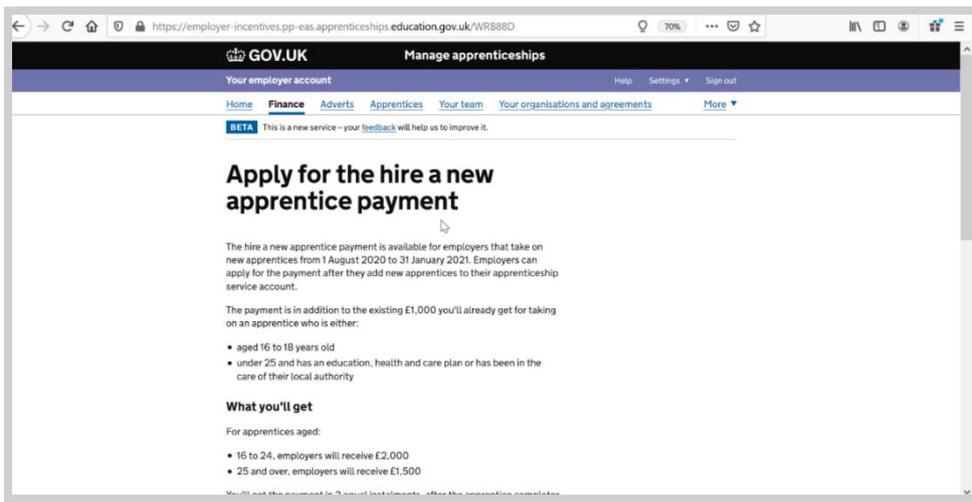
Scroll to the **Finances** section on the home page.



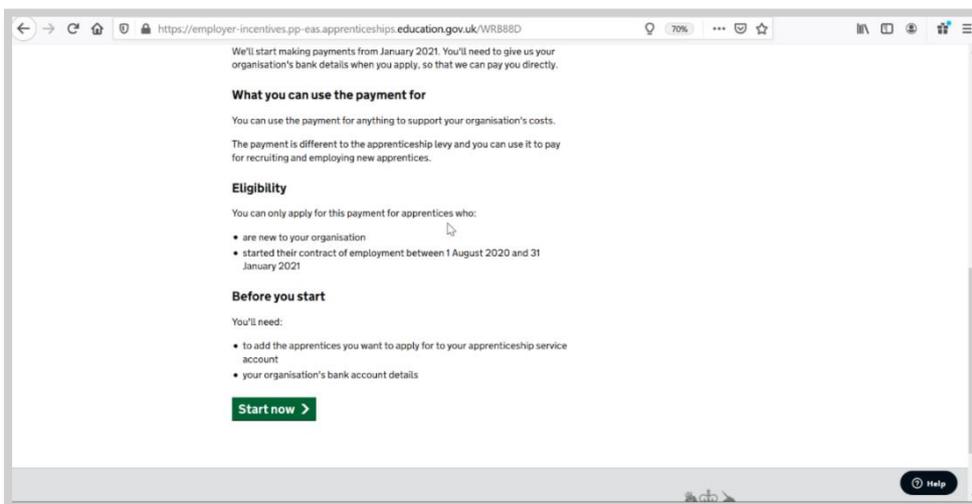
Click on **Apply for the hire a new apprentice payment**.



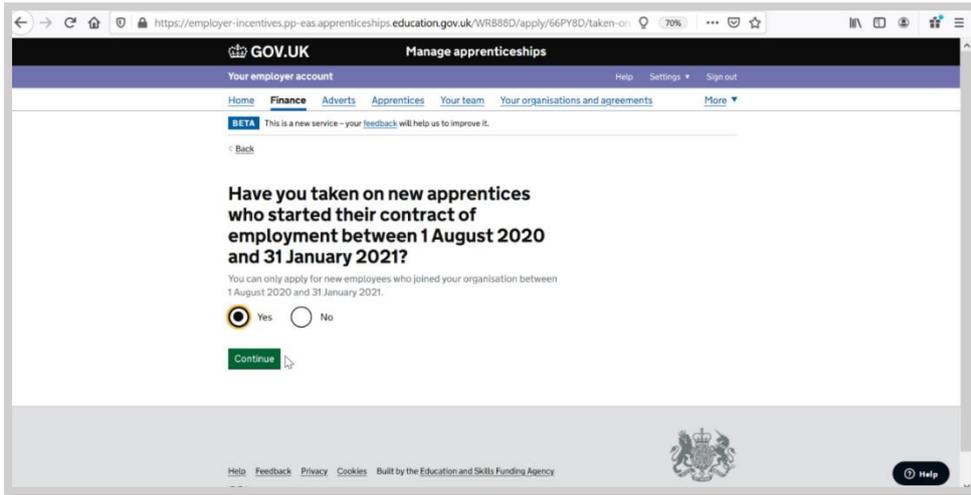
Read the guidance and information carefully to check that you are eligible for the incentive.



Click **Start now**.

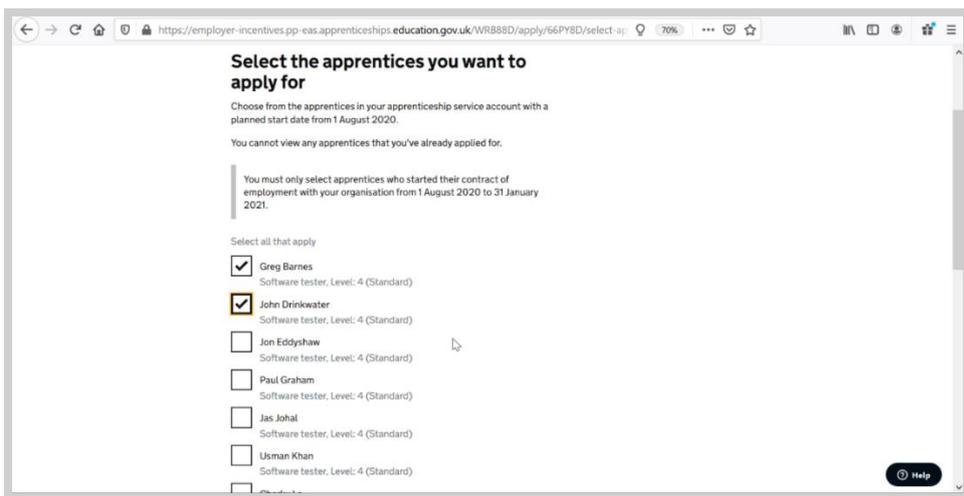


Click **Yes** and **Continue**.

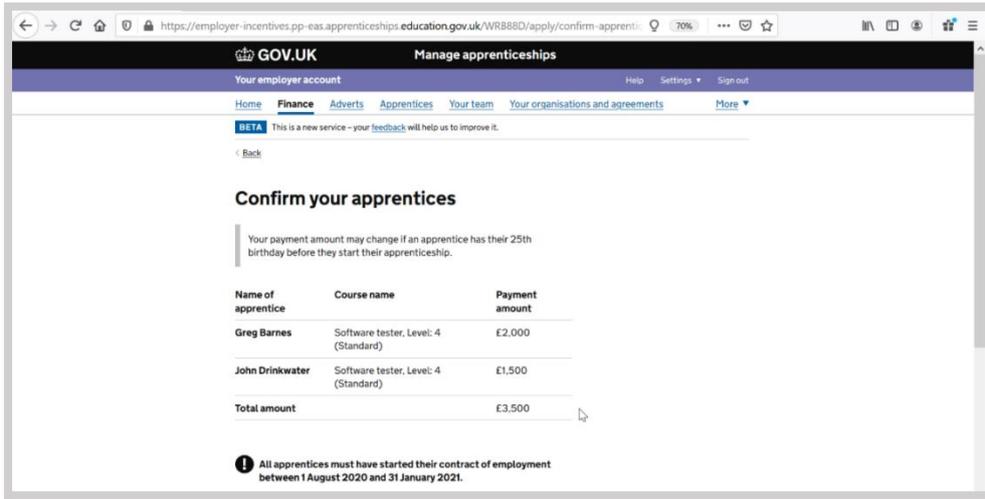


Select the apprentices you want to apply for. Remember, you can only apply for the apprentices who started their contract of employment from 1<sup>st</sup> August 2020 to 31<sup>st</sup> January 2021.

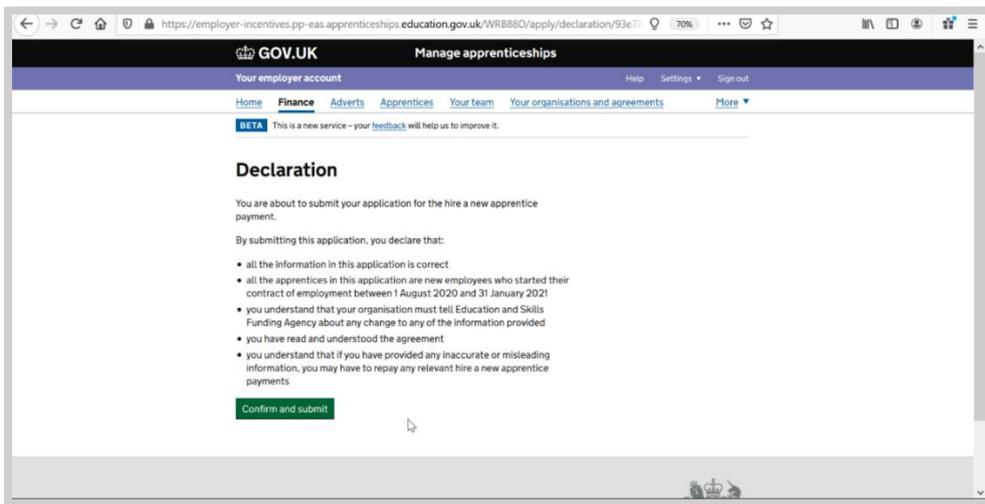
**NOTE:** The ESFA may audit this at random, and you would be expected to provide the necessary evidence to prove this.



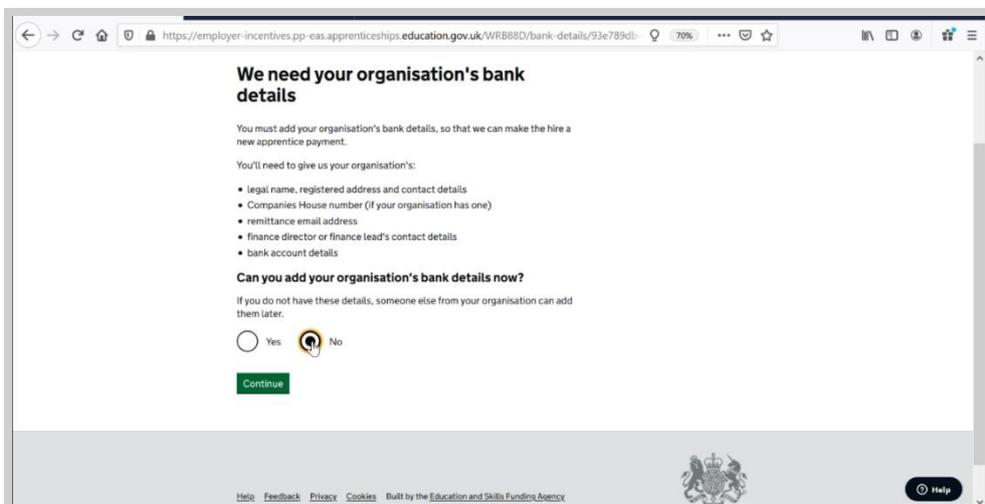
Check the summary screen to make sure only eligible apprentices are listed and confirm.

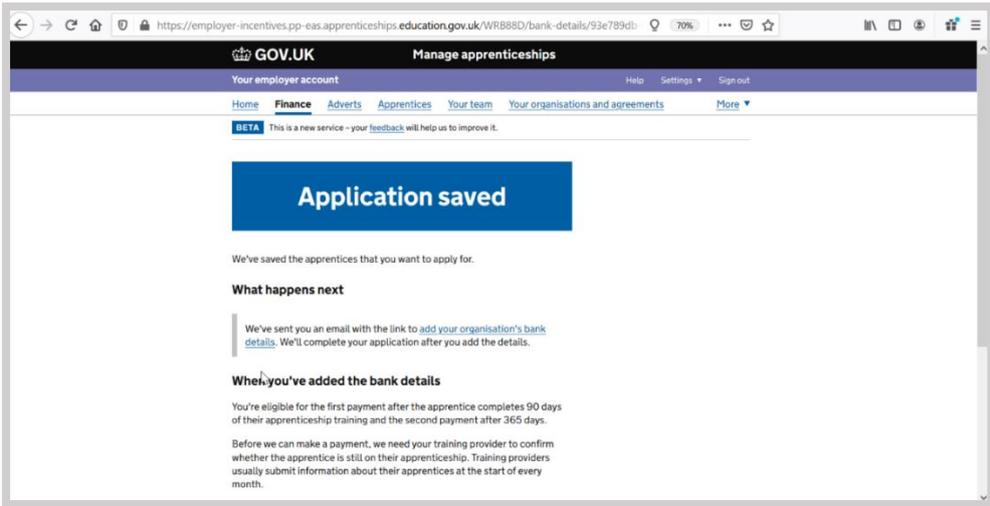


Read the declaration and then click **Confirm and Submit**.

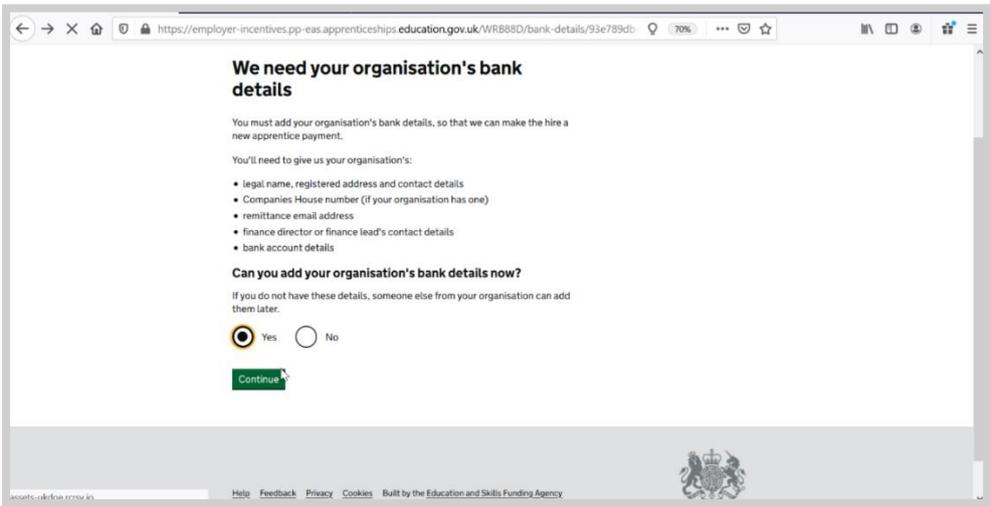


You will then be directed to begin adding your company and bank details into the system. You can either do this now or save and add these details at a later date. If you don't have the details to hand you will be directed to an 'Application Saved' screen.

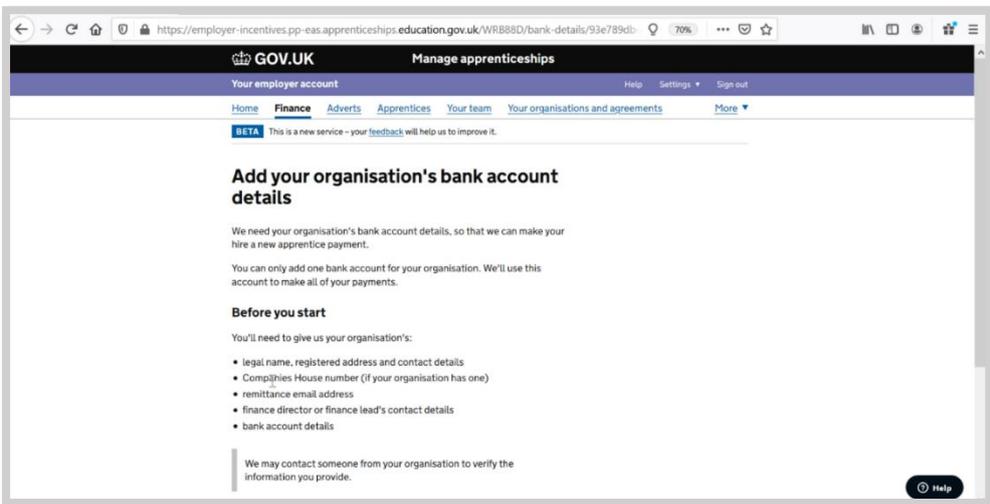


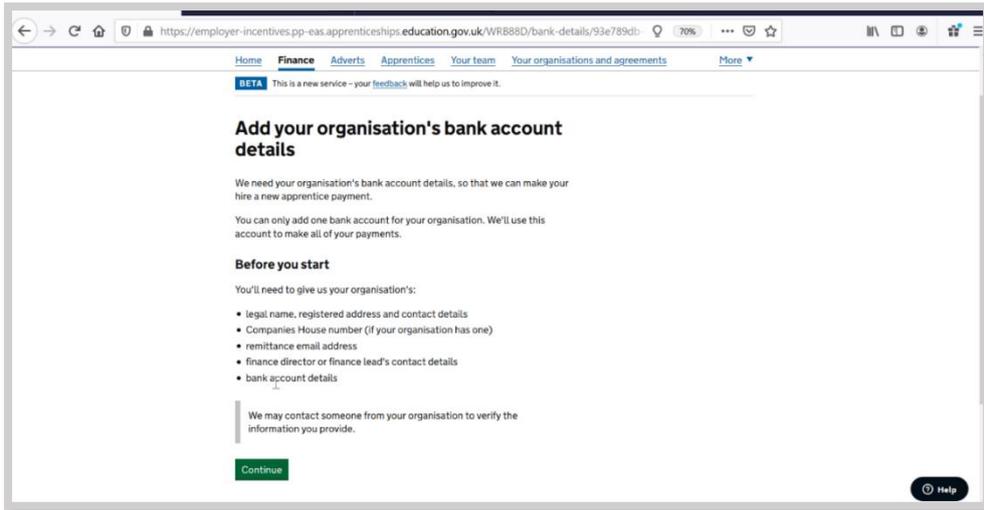


If you do have your bank details available, you can complete these now. Click **Yes** and **Continue**.  
**NOTE:** You can only use one set of bank details per Apprenticeship Service account.

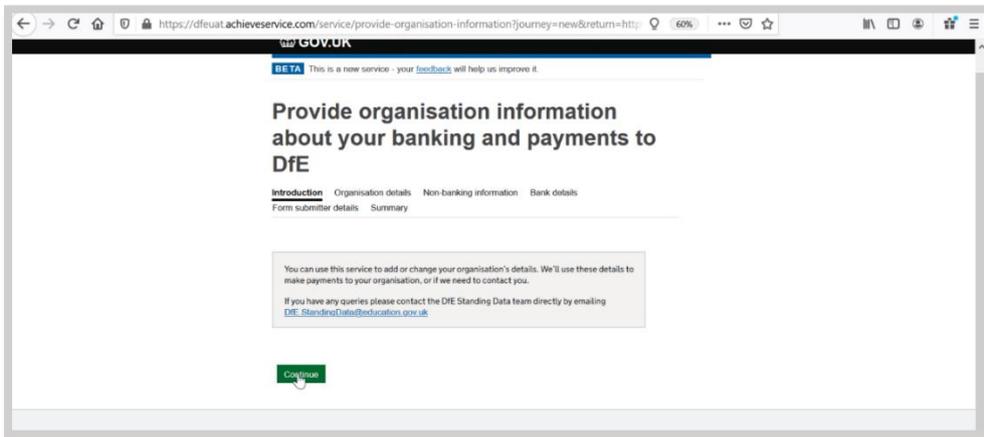


Before you start, make sure you have all the information you will need to hand. Click **continue**.

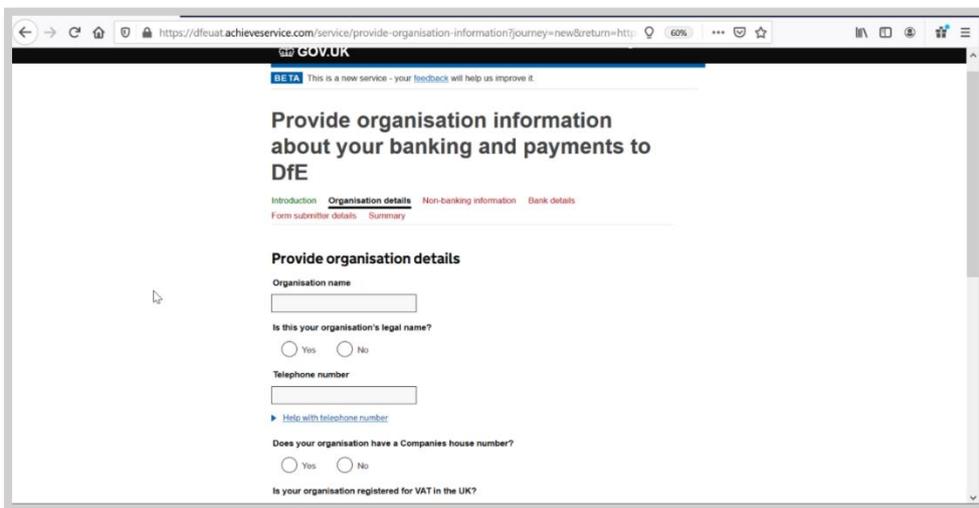




You will be directed to a new set of screens requesting information about your organisation and bank details. Click **continue**.



- Add your organisation's name – ensuring you use the legal entity.
- Add your organisation's telephone number. (The preference is to include a landline number. Do not include any spaces in the telephone number. Failing this you can include a mobile phone number).



GOV.UK

BETA This is a new service - your feedback will help us improve it.

## Provide organisation information about your banking and payments to DfE

Introduction **Organisation details** Non-banking information Bank details  
Form submitter details Summary

### Provide organisation details

Organisation name  
ESFA Ltd ✓

Is this your organisation's legal name?  
 Yes  No ✓

Telephone number  
[ ]

[Help with telephone number](#)

Does your organisation have a Companies house number?  
 Yes  No

Is your organisation registered for VAT in the UK?

If you have one, add your organisation's Companies House Number and VAT number.

Does your organisation have a Companies house number?  
 Yes  No ✓

Companies house number  
1234567 ✓

Is your organisation registered for VAT in the UK?  
 Yes  No ✓

[My organisation is registered for VAT overseas](#)

Does your organisation meet the criteria for a small and medium-sized enterprise (SME)?  
 Yes  No ✓

[Help with SMEs](#)

UKPRN (optional)  
[ ]

[Help with UKPRN](#)

DUNS number (optional)  
[ ]

[What is a DUNS number?](#)

[Continue](#)  
Back

Confirm whether you are an SME or not and add a UKPRN (ONLY if you are an employer-provider) and DUNS number (only if you have one).

Is your organisation registered for VAT in the UK?  
 Yes  No ✓

[My organisation is registered for VAT overseas](#)

Does your organisation meet the criteria for a small and medium-sized enterprise (SME)?  
 Yes  No ✓

[Help with SMEs](#)

UKPRN (optional)  
[ ]

[Help with UKPRN](#)

DUNS number (optional)  
[ ]

[What is a DUNS number?](#)

[Continue](#)  
Back

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Select **continue**.

A screenshot of a web browser showing a form titled "Provide organisation information". The form has several sections with radio buttons and links:

- Is your organisation registered for VAT in the UK?** with radio buttons for "Yes" and "No" (selected). A green checkmark is visible.
- Does your organisation meet the criteria for a small and medium-sized enterprise (SME)?** with radio buttons for "Yes" and "No" (selected). A green checkmark is visible.
- UKPRN (optional)** with a text input field and a link "Help with UKPRN".
- DUNS number (optional)** with a text input field and a link "What is a DUNS number?".
- At the bottom, there are two buttons: "Continue" (highlighted in yellow) and "Back".

The footer contains "Data protection", "Cookies", "Built by the Department for Education", "OGL: All content is available under the Open Government Licence v3.0, except where otherwise stated", and the Royal Coat of Arms with "© Crown copyright".

Now add further address information.

A screenshot of the "Provide organisation information" form, specifically the "Non-banking information" section. The page has a "BETA" banner and navigation tabs: "Introduction", "Organisation details", "Non-banking information" (active), and "Bank details".

- Address details**
  - Do you have a UK address?** with radio buttons for "Yes" (selected) and "No". A green checkmark is visible.
  - Provide your organisation's registered address**
    - Text: "Where your organisation is registered at Companies House enter your registered Companies House address."
    - Text: "Where your organisation is not registered at Companies House enter the address where your bank account is registered."
    - Address line 1** with a text input field.
    - Address line 2 (optional)** with a text input field.

A screenshot of the "Provide organisation information" form, showing the "Address details" section with fields filled in. A yellow box highlights the "Postcode" field.

- Do you have a UK address?** with radio buttons for "Yes" (selected) and "No". A green checkmark is visible.
- Provide your organisation's registered address**
  - Text: "Where your organisation is registered at Companies House enter your registered Companies House address."
  - Text: "Where your organisation is not registered at Companies House enter the address where your bank account is registered."
  - Address line 1** with text "Chebstone House" and a green checkmark.
  - Address line 2 (optional)** with text "5 Quinton Rd" and a green checkmark.
  - Town or city** with text "Coventry" and a green checkmark.
  - County (optional)** with an empty text input field.
  - Postcode** with text "CV1 2WT" and a yellow highlight box.
- Remittance details**
  - Remittance email** with an empty text input field.

When inputting email addresses we ask you use generic work emails where possible and avoid personal work or personal non-work emails.

CV1 2WF ✓

**Remittance details**

Remittance email  
Fin.Team@esfa.com ✓  
[Help with remittance email](#)

**Your organisation's finance director or lead**  
Provide the name and email address of your organisation's finance director or lead.

Full name  
[Input field] ✓

Email address  
[Input field]  
[Help with email address](#)

[Continue](#)  
[Back](#)

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Select the type of bank account applicable to your organization, then click **continue**.

GOV.UK

BETA This is a new service - your feedback will help us improve it.

**Provide organisation information about your banking and payments to DfE**

Introduction Organisation details Non-banking information **Bank details**

Form submitter details Summary

**Bank details**

Select the type of bank account applicable to your organisation

UK bank account  
 Non-UK bank account

[Continue](#)  
[Back](#)

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Complete your bank details, and then click 'add bank details'.

**Bank details**

Select the type of bank account applicable to your organisation

UK bank account ✓  
 Non-UK bank account

**Name of bank**  
Natwest ✓

**Bank account name**  
AN Other ✓

**Account number**  
22345610 ✓

**Sort code**  
000004 ✓

[Add bank details](#)

**IBAN (optional)**  
[Input field]

**SWIFT code (optional)**  
[Input field]

[Continue](#)

https://dfeuat.achieveservice.com/service/provide-organisation-information?journey=new&return=http

Select the type of bank account applicable to your organisation

UK bank account ✓  
 Non-UK bank account

Name of bank  
 ✓

Bank account name  
 ✓

Account number  
 ✓

Sort code  
 ✓

[Add bank details](#) ○

IBAN (optional)

SWIFT code (optional)

[Continue](#)  
[Back](#)

You will now need to add the details of the individual completing this form on behalf of your organisation. In this instance you can use a personal work email address for yourself.

about your banking and payments to DfE

Introduction Organisation details Non-banking information Bank details

Form submitter details Summary

**Form submitter details**

In order to submit this form to the DfE Standing Data team you will need to provide us with your personal details (used for reference only).

First name

Surname

Email address

[Help with email address](#)

Is this a generic email address?  
 Yes  No

[Help with generic email address](#)

Telephone number

Additional comments (optional)

Once completed, click **continue**.

https://dfeuat.achieveservice.com/service/provide-organisation-information?journey=new&return=http

✓

Email address  
 ✓

[Help with email address](#)

Is this a generic email address?  
 Yes  No ✓

[Help with generic email address](#)

Telephone number  
 ✓

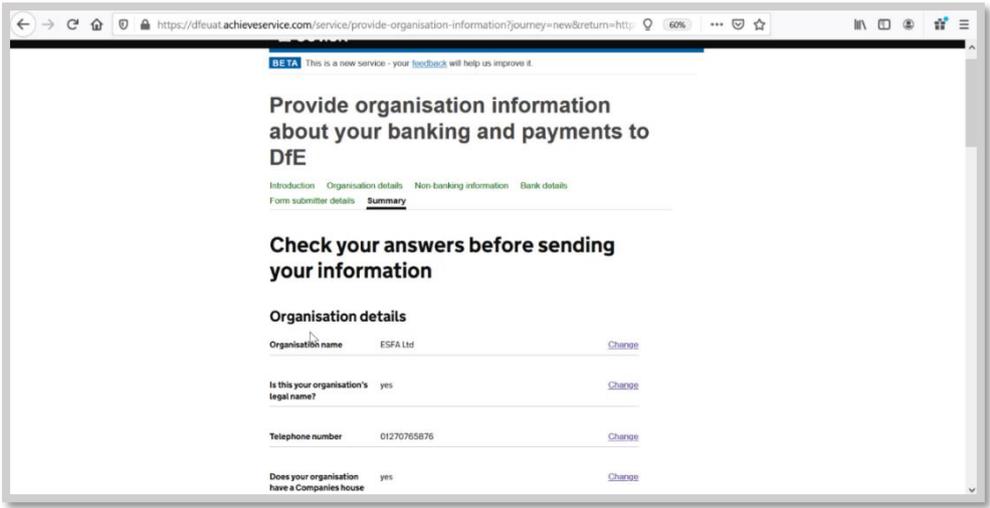
Additional comments (optional)

989 characters left of 1000

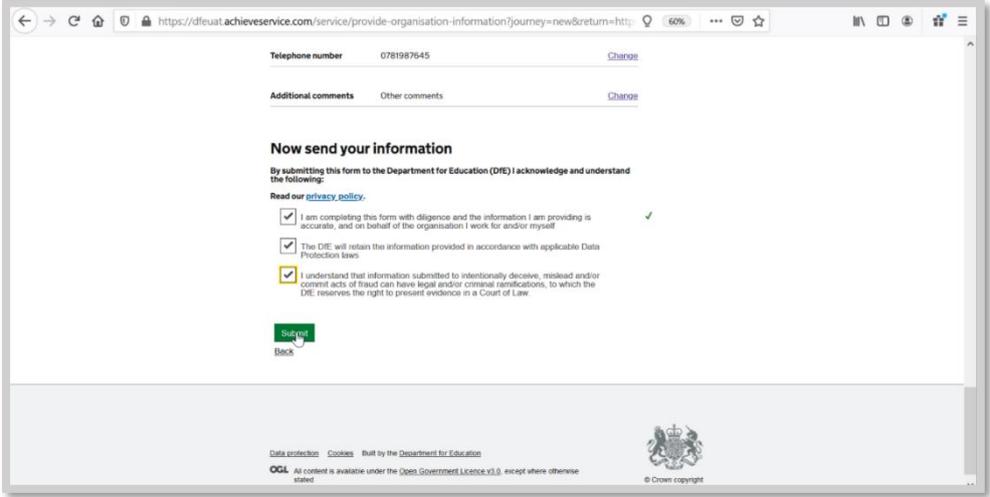
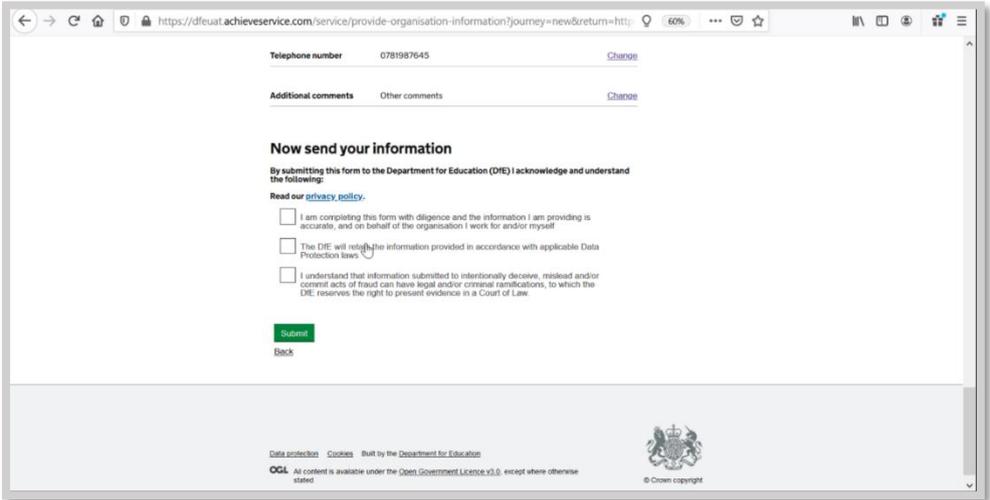
[Continue](#)  
[Back](#)

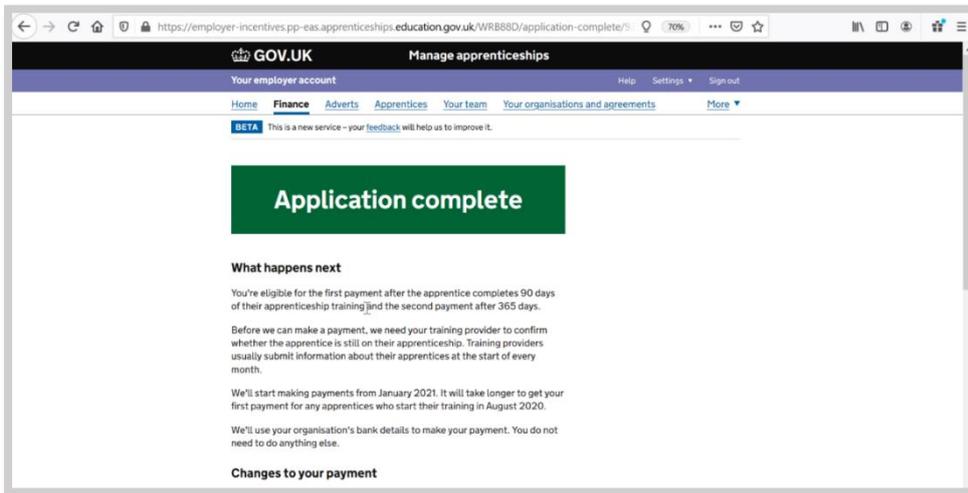
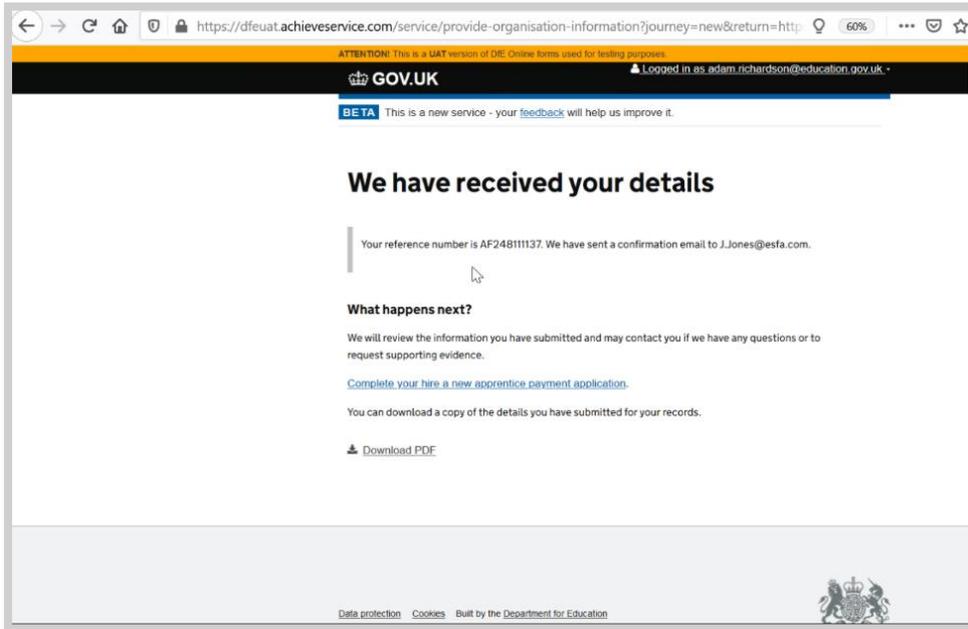
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Review the summary page of all information completed to date.



Provide your acknowledgement that the form has been completed accurately and select the box, then click **submit**.





- Payment of the incentive is made in two equal instalments.
- The first is made when the apprentice has been on programme for over 90 days – starting with the first payment from January 2021.
- The second half of the payment is made when the apprentice has been on programme for over 365 days.
- For example, September incentive applications will be made in January 2021.

### Useful links

<https://www.gpstl-apprenticeships.co.uk/employer/funding-incentives.shtml>

<https://www.gov.uk/guidance/pay-apprenticeship-levy>

<https://www.gov.uk/government/publications/apprenticeship-technical-funding-guide>

### Need help?

If you have any questions or need further support setting up the system, please call our employer registration team on 0330 1000 610 or email [apprenticeshipsuk@gpstrategies.com](mailto:apprenticeshipsuk@gpstrategies.com).