

## QUICK REFERENCE GUIDE

REVIEWING AND APPROVING A **SCHOOL READINESS FUNDING** PLAN IN THE KINDERGARTEN INFORMATION MANAGEMENT SYTEM (KIMS)

This guide provides step-by-step instructions for reviewing and approving a School Readiness Funding (SRF) Annual Plan in Kindergarten Information Management System (KIMS) and then submitting it for the Department of Education and Training (DET or Department) approval.

For assistance on the planning process please refer to the [School Readiness Funding](#) page on the Department's website.

### Overview process for reviewing and approving SRF Annual Plans in KIMS

*Note: A Service Provider Approver will **no longer** be sent an automated email when a plan requires approval.*

1. Log into the current KIM system and click on the **School Readiness Funding** button (The link to the system can be found on this webpage: [Kindergarten Information Management System](#)).
2. Go to the **Items to Approve** section.
3. Find, select and open the plan for the relevant service.
4. Review plan using the **View Plan as PDF** button at the top right of the screen. This pdf view can be saved or printed for sharing with colleagues or with your local Early Childhood Improvement Branch contact prior to submission for feedback.
5. Check the plan details.

*Note: The approver should take note of key SRF Policy changes that will be incorporated in the 2022 Plan. Example: if a service is accessing the 5% Administration/Planning allowance, check that the 5% calculation of total SRF is accurate.*

6. Make changes to the plan items OR send the plan back to the Service for updates. The Service will then need to resubmit to you for approval.
7. Submit the plan for approval to the Department's approver.

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*Note: All services and providers names, details and monetary values in KIMS screens in this guide are not real and are for example use only.*

### System Steps for reviewing and approving a School Readiness Funding Annual Plan

#### TO REVIEW A PLAN – Option 1

There are two ways to find the plans to review.

From the Home page go to the **Items to Approve**:

1. Review the **Annual Plan Status**.
2. Click **View** to open the relevant plan.

NAME	STATUS	ANNUAL PLAN STATUS	
SRF Plan Email Service 2022	Pending	End-of-Year Review/Acquittal with Approved Provider	<input checked="" type="checkbox"/> Approve/Submit to DET <input type="checkbox"/> Send back to service <input type="button" value="View"/>

## TO REVIEW A PLAN – Option 2

The second way to find your plans to review:

1. From the Home page click **Plan**.

2. Use the **Filter icon** to open up the Filters and then use:

- a. **Starts with** filter – change to **Contains** and enter text into the box to the right.
- b. Or use the **Status filter** to look for plans in a certain status e.g. With Approved Provider.

3. Use the **Page display** to show more than 10 plans at one time.

4. Select the relevant plan and click on the **Plan Name** to open.

Items to Approve (1)

Plans (100)

Plan Name Starts with [ ] Status [ ]

PLAN NAME	STATUS
SRF Plan ABCServiceAccount500 2021	In Progress
SRF Plan ABCServiceAccount501 2021	Approved - Active
SRF Plan ABCServiceAccount502 2021	Approved - Active
SRF Plan ABCServiceAccount503 2021	Approved - Active
SRF Plan ABCServiceAccount504 2021	Approved - Active
SRF Plan ABCServiceAccount505 2021	Approved - Active
SRF Plan ABCServiceAccount506 2021	Approved - Active
SRF Plan ABCServiceAccount507 2021	Approved - Active
SRF Plan ABCServiceAccount508 2021	Annual Plan with Approved Provider
SRF Plan ABCServiceAccount509 2021	Not Started

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## PLAN DETAILS

**Notes:**

The Plan Details are always displayed at the top of every page and provide a breakdown of the service's School Readiness Funding and the plan status.

The Plan Details are auto populated by the system and automatically update as the plan is completed.

Information displayed in this section – on the left-hand side of the screen:

1. **Name:** The name of the plan.
2. **SRF Year:** The year the plan will be implemented.
3. **Total School Readiness Funding (including DET Allied Health):** The Total School Readiness Funding allocated to the kindergarten service. This comprises funding for Menu Items/Flexible Funding plus DET Allied Health (if applicable).
4. **Total Funding for Items:** The amount allocated for expenditure on Menu Items and Flexible Funding.
5. **Estimated Expenditure for Items:** This field should match the Total Funding for Items, showing that the funding has been fully allocated.
6. **Remaining Funding for Items:** The remaining funding available for Menu Items and Flexible Funding. This field should show a value of \$0.

1	Name SRF Plan ABCServiceAccount512 2021
2	SRF Year 2021
3	Total School Readiness Funding (including DET Allied Health) \$15,000.00
4	Total Funding for Items \$10,000.00
5	Estimated Expenditure for Items \$10,000.00
6	Remaining Funding for Items \$0.00

Information displayed in this section – on the right-hand side of the screen:

7. **Service Name:** The name of the kindergarten.
8. **Status:** The current status of the plan (see below for status meaning).
9. **Total DET Allied Health Sessions:** The number of Allied Health sessions allocated to the service.
10. **Estimated DET Allied Health Sessions Accessed:** This field should be the same as the one above, showing that all sessions have been allocated.
11. **Remaining DET Allied Health Sessions:** This field should show a value of 0 (zero).

7	Service Name	ABCServiceAccount513
8	Status	Not Started
9	Total DET Allied Health Sessions	5
10	Estimated DET Allied Health Sessions Accessed	0
11	Remaining DET Allied Health Sessions	5

Status	Meaning
<ul style="list-style-type: none"> <li>• Not Started.</li> <li>• In Progress.</li> <li>• With Approved Provider.</li> <li>• Requires Amendment.</li> <li>• Submitted to DET.</li> <li>• Approved – Active.</li> </ul>	<ul style="list-style-type: none"> <li>• The Service User has not started completing the plan.</li> <li>• The Service User has started completing the plan.</li> <li>• The Service User has completed the plan and submitted it for Service Provider approval.</li> <li>• The plan has been sent back to the Service User for amendment by the Service Provider Approver or DET.</li> <li>• The plan has been submitted to DET for approval by the Service Provider Approver and is now read-only.</li> <li>• The plan has been approved by DET.</li> </ul>

VIEW PLAN AS PDF

1. Click **View Plan as PDF** to view and/or download as a printable PDF.  
This can then be saved to your computer or printed off.

2. Click the **Print icon** to print off the plan.
3. Click the **Save icon** and this will open a new window, to select a location to save the plan. You can then email the plan to a colleague or manager for review.
4. Once you have completed these steps, close the new tab that has opened with the **X**.

SUMMARY			
Total School Readiness Funding (including DET Allied Health)	\$15,000	Plan Status	In Progress
Mid-year review complete?	No	End of year acquittal complete?	No
Total Funding for Items	\$10,000	Total DET Allied Health Sessions	5
Estimated Expenditure for Items	\$3,600	Estimated DET Allied Health Sessions Accessed	5
Remaining Funding for Items	\$6,400	Remaining DET Allied Health Sessions	0

**COLLECT DATA**

**Data source** Findings from data

Australian Early Development Census (AEDC) 50% of children in this area are developmentally at risk or vulnerable in the language and cognitive skills domain. • 50% of children in this area are developmentally at risk or vulnerable in the communication skills and general knowledge domain. • 50% of children in this area are developmentally vulnerable/developmentally at risk in the social competence domain. • 50% of children in this area attend a kindergarten program prior to starting school. This is below the Victorian State average.

**QUESTION AND ANALYSE**

**Level** Issues and needs

Community/Child Level Data shows that children and families typically attending our service require support in: • communication and language, particularly oral communication and language • developing social competence, particularly self-regulation

**PRIORITIES**

## SERVICE PROVIDER APPROVER OPTIONS

There are three options available to you:

1. Review plan and send back to the Service for updates.
2. Review the plan and make updates to the items yourself, then approve.
3. Review the plan and approve it, sending it to the Department for approval.

**OPTION 1 - SEND A PLAN BACK TO THE SERVICE USER FOR UPDATE**

1. From the Home page **Items to Approve** section.
2. Click Send back to service for the relevant plan.

3. In the **Comments** window, enter instructions to the Service User about the updates required.  
These comments will be visible to the Service User in the plan and will also be sent via an automated email.
4. Click **Next**.  
Click Finish.

**Note:**

The status of the plan changes to “Requires Amendment” and an email is automatically sent to the Service User informing them that the plan requires updating.

## OPTION 2 – UPDATE THE PLAN

Open the plan.

Go to the relevant section that requires update, for example, the Menu Items.

1. Click **Edit** to open the **Menu Item**, and make changes to the costs or text, or click **Delete** to remove that Menu Item altogether.
2. Use the **New Menu Items** button to add a new Menu Item.

Once you have completed all your changes, go back to the Home Page and follow the Option 3 steps to approve the plan.

Contact Details Introduction 1. Collect Information 2. Question & Analyse 3. Identify Priorities **4. Select Menu Items** 5. Plan Allied Health 6. Flexible Funding Items

Please refer to the *School Readiness Funding: Annual Planning Guide* for comprehensive support to complete this section, including examples of the level of detail required.

...tion of the menu items which can be filtered by priority area and outcome areas, can be accessed by [Menu Items](#)

\*Please note that the *Remaining Funding for Items* must be '\$0' in order to submit the plan for approval.

Select Menu Items (2)

PRIORITY AREA	ITEM	ESTIMATED ITEM COST	ESTIMATED BACKFILL COST	STATUS
Communication (Language Development)	Menu Item Example Name ABC	\$500.00	\$600	Not Started
Access and inclusion	Menu Item Example Name DEF	\$1,000.00	\$600	Not Started
		<b>Total Item Cost: \$2700</b>		

Buttons: **2** + New Menu Item, **1** Edit, Delete

**OPTION 3 - SUBMIT FOR DET APPROVAL**

1. From the Home page **Items to Approve** section.
2. Click **Approve/Submit to DET** for the relevant plan.

3. In the **Comments** window, enter comments for DET.
4. Click **Next**.  
Click **Finish**.

**Notes:**

Plan is now in 'read-only' mode for all.

DET are not able to change this plan. The plan will need to be returned to Service for changes to be made.