QUICK REFERENCE GUIDE

USING AND MANAGING YOUR **SCHOOL READINESS FUNDING** PLAN IN KINDERGARTEN INFORMATION MANAGEMENT SYSTEM (KIMS)

This guide provides step-by-step instructions for using and managing your School Readiness Funding (SRF) Annual Plan in Kindergarten Information Management System (KIMS), and submitting it for approval for any changes (if required).

For assistance on the planning process please refer to the School Readiness Funding page on the Department's website or contact your Early Childhood Improvement Branch for assistance.

Overview process for using and managing your SRF Annual Plan in KIMS

Once your School Readiness Funding plan in KIMS has been approved by the Department, it will be in an **Approved-Active** status.

You are then able to show which Menu items are in progress, enter actual amounts paid, change, or delete Menu items. You will also be able to apply for approval to change or add new flexible funding items (where appropriate).

1. Log into the current KIMS 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 **Plan** tab

3. Go to the **Menu Items** to update the status of Menu Items:

   3.1. Update a Menu Item to **In Progress** and add actual $ amounts paid against the item cost, backfill hours and/or backfill cost.

   3.2. Update a Menu Item to **Completed** add actual $ amounts paid against the item cost, backfill hours and/or backfill cost, and complete the mandatory fields.

   3.3. Or set the status to **Not Accessing** and complete the mandatory fields. At this point the budget from these Menu Items will return to the plan, so that you are able to add new Menu Items. Remember to stay within your SRF allocation amount for Menu Items.

4. If provided to your service, update the **Allied Health** session status, in the same way as the instructions for the Menu Items.

5. If applicable, update the **Flexible Funding** items status, in the same way as the instructions for the Menu Items.

   Note. An increase in spending of $100 and above, to a Flexible Funding item will require approval via the School Readiness Funding approval workflow.

   All new Flexible Funding items will require approval via the School Readiness Funding approval workflow.

   *Use the **Submit Flexible Funding for Approval** button.*

6. Review the plan using the **View Plan as PDF** button at the top right of the screen. *Note: This PDF can be saved or printed for sharing.*

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

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System Steps for using and managing your School Readiness Funding Annual Plan in KIMS

PLAN DETAILS

The Plan Details displayed at the top the page provide a breakdown of the service's School Readiness Funding and the plan status. The fields displayed will change once the plan has become **Approved - Active**.

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

Refer to these Plan details in the top section as you use the plan to determine remaining funding on items and allied health sessions (where relevant).

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. **** CHANGED: Actual Expenditure for Items:** This field will automatically increase as you add the actual menu item costs, backfill costs and flexible funding costs into the plan. The objective to ensure this field shows the same dollar value as the Total Funding for Items prior to the end of year survey/acquittal process.

6. ****CHANGED: Remaining Funding for Items:** The remaining funding available for Menu Items and Flexible Funding. This field will automatically decrease as you enter costs into the plan reflecting the actual funding that has been used. The objective is to ensure that this field shows a $0 value at the end, prior to the end of year survey/acquittal process.

**   Fields have changed now that the plan has been approved. For example, on this screen Actual Expenditure (changed from Estimated Expenditure) and Remaining Fund for items (now represents the plan's remaining funds after invoices paid, as opposed to the estimated budget in the plan).

1 Name
SRF Plan ABCServiceAccount520 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 Actual Expenditure for Items
$0.00

6 Remaining Funding for Items
$10,000.00

PLAN DETAILS (Continued)

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. **** CHANGED: Actual DET Allied Health Sessions Accessed:** This field will automatically increase as you add the actual Allied Health sessions used. This field should match the number of sessions as the Total DET Allied Health Sessions field at the end of year acquittal process.

11. ****CHANGED: Remaining DET Allied Health Sessions:** This field will automatically decrease as you enter the number of Allied Health sessions accessed in the plan. The objective to ensure this field shows a value of 0 (zero) prior to the end of year survey/acquittal process.

** Fields have changed now that the plan has been approved. For example, on this screen Actual DET Allied Health Sessions Accessed (changed from Estimated Allied Health Sessions) and Remaining DET Allied Health Sessions (now represents the plan's remaining sessions after sessions are completed, changed from estimated sessions prior to plan approval).

(7) Service Name
ABCServiceAccount520

(8) Status
Approved – Active

(9) Total DET Allied Health Sessions
5

(10) Actual DET Allied Health Sessions Accessed
0

(11) Remaining DET Allied Health Sessions
5

Status	Meaning
• Approved – Active	• The plan has been approved by DET and is ready for use
• Flexible Funding with Approver Provider	• Flexible funding changes need approval from Service Provider
• Flexible Funding Requires Amendment	• Flexible funding changes have been returned and require update
• Flexible Funding Submitted to DET	• Flexible funding changes need approval from DET
• Mid-Year Review with Approved Provider	• Mid-Year review process has been submitted to Service Provider
• End-of-Year Review / Acquittal with Approved Provider	• End-of-Year review process has been submitted to Service Provider

VIEW PLAN AS PDF

1. Click **View Plan as PDF** to view the whole plan in a document format. This can then be saved to your computer or printed.

| Plan Details | Mid-Year Review | End-of-Year Review/Acquittal |

① ⬇ View Plan as PDF

⬇ Submit Plan For Approval
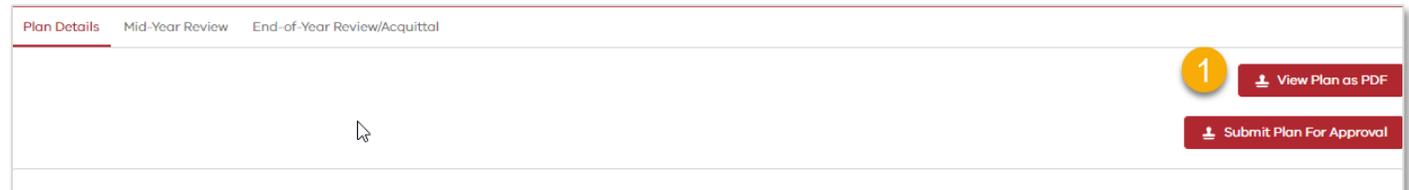
**CHANGED / NEW FIELDS ON THE PDF VIEW:

1. **Mid-year review complete?** This field will state Yes once the mid-year review is completed
2. **Actual Expenditure for Items and Remaining Funding for Items** fields – will now reflect the actual paid amounts entered against the Menu Items, Allied Health sessions and Flexible Funding items
3. **End of year acquittal complete?** This field will state Yes once the End of year acquittal survey is completed. Note access to the End of year acquittal survey is only possible after all the plan items have a status of 'complete' or 'not accessing item'. Further sections in this guide explain the steps to do that.
4. **Actual DET Allied Health Sessions Accessed and Remaining** fields – these will now reflect the actual sessions accessed

School Readiness Funding Annual Plan - 2021

ABCServiceAccount520

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SUMMARY			
Total School Readiness Funding (including DET Allied Health)	$15,000.00	**Plan Status**	Approved - Active
Mid-year review complete? ①	No	**End of year acquittal complete?** ③	No
Total Funding for Items	$10,000.00	**Total DET Allied Health Sessions**	5
Actual Expenditure for Items ②	$0.00	**Actual DET Allied Health Sessions Accessed** ④	
Remaining Funding for Items		**Remaining DET Allied Health Sessions**	5

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VIEW PLAN AS PDF

**CHANGED / NEW FIELDS ON THE PDF VIEW:

5. **Cost ($)** – the actual paid invoice costs entered on the plan
6. **Status** – this is the status of the Menu Item – the default starting status is 'Not Started' and each item's status will change to show In-Progress, Completed or Not Accessing as the menu items are updated in the plan. This guide provides the steps to do this in the next sections.
7. **Outcome Classification** – this will be selected from a drop-down list of options for each Menu Item on completion of the item

MENU ITEMS

Menu Item		_	Goal of this year	Indicator and Measure of success	Cost($)	Backfill Cost($)	Timeline	Details/Comments	Outcome	Outcome Classification	Status
Access and inclusion	Additional educators	**Planned**	For educators to develop strategies to support all children and families to access early childhood education and intervention services. For parents to develop an understanding of importance of early childhood education.	Educators demonstrate enhanced skills, knowledge and confidence to support children and families experiencing vulnerabilities, particularly those at risk of not engaging or disengaging from early childhood education. Parents receive inclusive parenting support and assistance to access services pertinent to their child's needs, particularly kindergarten and support children's transition from kindergarten services to school. Evidence of outcomes will be provided through quarterly reports which detail the effect on enrolment rates and attendance for vulnerable cohorts.	$2,800		Term 2 Term 3 Term 4				Not Started
		Actual			$0						

8. **Outcome** – this will be a free text field to be entered on completion of the item

HOW TO UPDATE A MENU ITEM / ALLIED HEALTH SESSION OR FLEXIBLE FUNDING ITEM

This Quick Reference Guide includes instructions on how to update a Menu Item as an example**.** The same process is used for updating Allied Health sessions and Flexible Funding Items.

Once the plan has been approved, and you start to use the funding, update the plan to show the current status of each item (Menu Item, Allied Health Session or Flexible Funding item).

The options for managing / using the plan are as follows:

If you	Next steps
• have <u>partially completed accessing the item</u> and <u>already paid an invoice</u>	update the item status to 'In-Progress' and add the paid invoice amount(s).
• have <u>completed the item</u> or the sessions have been delivered	update the item status to 'Complete', add the paid invoice amount(s) and complete the mandatory fields.
• are <u>not going to access</u> an item	update the item status to 'Not Accessing' and complete the mandatory fields. *Note: The estimated $ amount from these items will return to the plan and can be used against Menu Items already approved or new Menu Items*
• have <u>remaining funding for items</u>	you have the following options: • add a <u>new Menu Item</u> to the plan without requiring re-approval from your Service Provider or the Department. • update an <u>existing Flexible Funding Item</u> as outlined above. If your paid invoice (actual) is **$100** or greater than the estimated expenditure, the plan will require **re-approval** from your Service Provider Approver and the Department • add a <u>new Flexible Funding Item</u>. Your plan will require **re-approval** through your Service Provider Approver and the Department

HOW TO SET A MENU ITEM AS IN-PROGRESS

1. On the Menu Items tab, click **Edit** next to the Menu Item that is has been started

2. Update the **Status** to: **In Progress**

3. Enter the amount of the paid invoices into the **Actual Expenditure** field

4. Click to select the **Term(s)** of when this item is being accessed if different from those listed against **Selected Timeline**.

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HOW TO SET A MENU ITEM AS IN-PROGRESS

5. Enter **Actual Backfill hours**, if these had been entered as Estimated hours in the plan. (Note the example shown did not include Estimated Backfill Hours and therefore no Actual is required)

6. Enter **Actual Backfill Cost**, if this had been estimated in the plan (Note the example shown did not include Estimated Backfill Costs and therefore no Actual is required).

7. Review the **Goals** and update if required.

8. Review the **Measures for Success** and update if required.

Click **Next**

Estimated Backfill Hours: [   ]

Actual Backfill/Additional Hours (leave blank if not applicable)

5 [   ]

Estimated Backfill Cost: [   ]

Actual Backfill/Additional Cost (leave blank if not applicable)

6 [   ]

Goal For This Year : For educators to develop strategies to support all children and families to access early childhood education and intervention services.
For parents to develop an
understanding of importance of early childhood education.

Updated Goals for this Year

7 [   ]

Indicator and Measure of Success : Educators demonstrate enhanced skills, knowledge and confidence to support children and families experiencing vulnerabilities, particularly those at risk of not engaging or disengaging from early childhood education.
Parents receive inclusive parenting support and assistance to access services pertinent to their child's needs, particularly kindergarten and support children's transition from kindergarten services to school. Evidence of outcomes will be provided through quarterly reports which detail the effect on enrolment rates and attendance for vulnerable cohorts.

Updated Indicator and Measure of Success

8 [   ]

HOW TO SET A MENU ITEM AS IN-PROGRESS

The Actual cost will display in the **Actual Expenditure** column, and the **Total Item Cost** will be updated.

The Item Status will show as **In Progress**.

	ITEM	ESTIMATED ITEM COST	ACTUAL EXPENDITURE	ESTIMATED BACKFILL COST	ACTUAL BACKFILL COST	STATUS		
	Additional educators	$2,800.00	$1,400.00			In Progress	✏ Edit	🗑 Delete
Development)	Coaching	$2,800.00	$0.00	$800.00		Not Started	✏ Edit	🗑 Delete
ional)	Wellbeing Practice Guide	$1,200.00	$0.00	$400.00		Not Started	✏ Edit	🗑 Delete

Select Menu Items (3)   ⟳ ⊕ New Menu Item

Total Item Cost: $1400

Note:

You are able to use the funds as required across Menu Items.

If one Menu Item costs less than your Estimated costs, then you are able to use that balance against another item or a new item.

However, if your paid invoice costs for one Menu Item are higher than your Estimated costs, and there are no reductions on other Menu Items, you will only be able to enter the Estimated cost into the Actual cost field. You are not able to show actual costs greater than the total plan value.

HOW TO SHOW THAT A PLANNED MENU ITEM IS NOT GOING TO BE USED

1. Click **Edit** next to the Menu Item that is not going to be used.

Select Menu Items (3)								
PRIORITY AREA	ITEM	ESTIMATED ITEM COST	ACTUAL EXPENDITURE	ESTIMATED BACKFILL COST	ACTUAL BACKFILL COST	STATUS		
Access and inclusion	Additional educators	$2,800.00	$0.00			Not Started	✏ Edit	🗑 Delete
Communication (Language Deevelopment)	Coaching	$2,800.00	$0.00	$800.00		Not Started	✏ Edit	🗑 Delete
Wellbeing (Social and Emotional)	Wellbeing Practice Guide	$1,200.00	$0.00	$400.00		Not Started	✏ Edit ①	Delete
			Total Item Cost: $0					

2. Update the **Status** to: **Not Accessing Item**

3. A new question will display in red text to confirm that you are not going to use this item, tick **Yes**

4. Select one of the available **Not Accessing Reasons** from the list by clicking on it

Click **Next** to save.

Record Update

Priority Area : Wellbeing (Social and Emotional)

* Status

Not Accessing Item ②

Are you sure you want to mark this item as 'Not Accessing Item'?
You will not be able to make any further edits to this item. Click 'Yes' to confirm.

☑ Yes ③

Estimated Item Cost : 1,200

* Not Accessing Reason ④

Actual cost of menu items differed from what was budgeted
Change in service needs
Staff unable to attend available dates
Item not available in local area
Menu item was already fully booked

HOW TO SHOW THAT A PLANNED MENU ITEM IS NOT GOING TO BE USED

The Status will show as **Not Accessing Item**.

	ITEM	ESTIMATED ITEM COST	ACTUAL EXPENDITURE	ESTIMATED BACKFILL COST	ACTUAL BACKFILL COST	STATUS		
	Additional educators	$2,800.00	$1,400.00			In Progress	Edit	De
Development)	Coaching	$2,800.00	$0.00	$800.00		Not Started	Edit	De
ional)	Wellbeing Practice Guide	$1,200.00	$0.00	$400.00		Not Accessing Item	Edit	De
			Total Item Cost: $1400					

Select Menu Items (3)   New Menu Item

Note:

The Estimated costs that had been allocated to this Menu Item will be available to use across the other Menu Items / Flexible Funding Items or Backfill Costs (including for Allied Health) in the plan.

You are also able to add new Menu Items to take up this estimated expenditure.

The available funding will appear at the top of the page under the SRF Plan details within the "Remaining Funding for Items"**.**

HOW TO SET A MENU ITEM TO COMPLETE

Click **Edit** next to the Menu Item that has been fully delivered / completed.

1. Update the status to: **Complete**

2. Enter the total amount of invoices paid into **Actual Expenditure**

3. Select the **Term**, if different to those shown against Selected Timeline

4. Enter **Actual Backfill hours**, if these had been estimated, an entry must be made here. You can enter 0 (zero). If this had been left blank previously, then no entry is required.

5. Enter **Backfill costs**, if these had been estimated, an entry must be made.

① * * Status

Complete

Estimated Item Cost : 2,800

② * * Actual Expenditure

$2,800

Selected Timeline : **Term 2;Term 3;Term 4**

Actual Timeline Selected: Term 1

Actual Timeline (Select one Term or hold the CTRL key on your keyboard to select multiple Terms)

Term 1
Term 2
③ Term 3
Term 4

Estimated Backfill Hours:

Actual Backfill/Additional Hours (leave blank if not applicable)

④

Estimated Backfill Cost:

Actual Backfill/Additional Cost (leave blank if not applicable)

⑤

Goal For This Year : For educators to develop strategies to support all children and families to access early childhood education and intervention services.
For parents to develop an
understanding of importance of early childhood education.

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HOW TO SET A MENU ITEM TO COMPLETE

6. Enter updated **Goals** if required

7. Enter updated **Indicators and Measures of Success** if required

8. Enter any **Details / Comments**

9. Mandatory – Enter an **Outcome** for the sessions

10. Mandatory – Select from the list of available options the **result of the School Readiness Funding outcomes**

11. Click **Next** to save.

Updated Goals for this Year

6

Indicator and Measure of Success : Educators demonstrate enhanced skills, knowledge and confidence to support children and families experiencing vulnerabilities, particularly those at risk of not engaging or disengaging from early childhood education.
Parents receive inclusive parenting support and assistance to access services pertinent to their child's needs, particularly kindergarten and support children's transition from kindergarten services to school. Evidence of outcomes will be provided through quarterly reports which detail the effect on enrolment rates and attendance for vulnerable cohorts.

Updated Indicator and Measure of Success

7

Details/Comments (optional)

8

** Outcome
Educations have demonstrated enhanced skills and confidence supporting children experiencing vulnerabilities. Parents have received support with attendance at Kindergarten and support to transition to school.

9

** As a result of School Readiness Funding, outcomes:

10 Have been exceeded/skills embedded into practice ▾

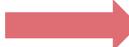**11** Next

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HOW TO CHANGE A FLEXIBLE FUNDING ITEM

Follow the previous steps above for setting the Flexible Funding Item to:

- In progress
- Not Accessing or
- Completed

Note: New Items and Actual costs more than $100 above the Estimated costs will require additional Departmental approval.

This message to the right will display ➡️

Record is updated successfully.

This Flexible Funding Item must be submitted for approval as it is new, or the Actual Cost is at least $100 more than the Estimated Cost.

Please click the Submit Flexible Funding For Approval button to submit it for approval.

If you have more Flexible Funding items to add or update, please add or update them before clicking the submit button.

After you submit for approval, the annual plan will become read-only until the Flexible Funding is approved.

Previous   Finish
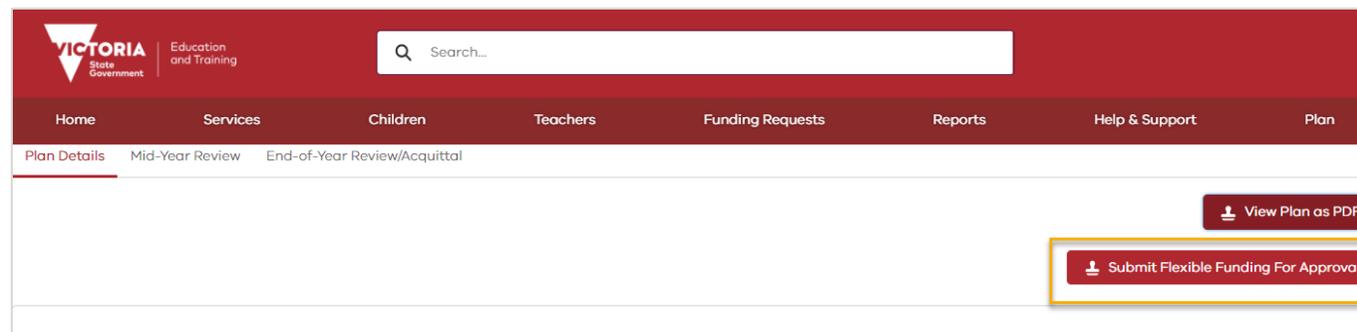
As per the message, update all items in the plan as required, and then at the top of the plan a new flexible funding approval button will display.

Click the **Submit Flexible Funding for Approval button.**

Note: The plan will now be in read-only mode and require approval from your Service Provider and from the Department. No further updates can be made to the plan until is shows a status of: Approved - Active.

VIEW PLAN AS PDF

1. After making updates to the plan you can use the View Plan as PDF button to review the changes and actuals.
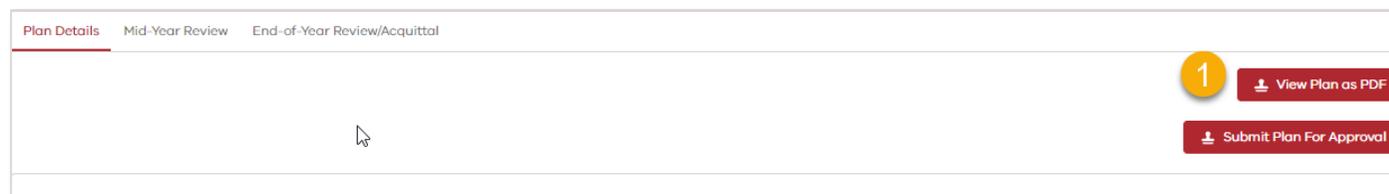
Entered values will display e.g. Actual costs, outcomes, status etc.