

 **ROLE PROFILE**

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| **Role:** |  **Funding Executive** |
| **Department:** | **Apprenticeship Operations** |
| **Reports to:** | **Operations Manager** |
| **Is line manager:** | **NO** |

**Job Purpose**

The role will be responsible for ensuring learners are fully signed up with compliance documents and inputted into the funding systems in a timely manner, this will include PICS and Digital Apprenticeship Service (DAS). To be the first point of contact to learners and line managers beginning their apprenticeship journey. To monitor new starter forms to gather and file learner documents.

Responsible for ensuring the ESFA funding rules are adhered to through the funding process by audit checking all documentation completed for learners that wish to enrol with Estio and Firebrand.

Responsible for managing the data inputted into Estio’s and Firebrand internal systems (PICS) and processing learner records on MIS for new apprentices.

**Key Responsibilities**

* Providing first line of contact booking initial calls with learners and line managers via Emails, telephone calls
* Accurately processing all New Starts Forms.
* Maintaining the starts summary company database/spreadsheets
* Monitoring learner start numbers to ensure we are reaching full capacity for cohorts
* Management of Leaver nonachiever process – audit & compliance check of learner folder and leaver nonachiever form for evidence of last date in learning, processing of leaver non achiever details on PICS, collating and recording leaver nonachiever reason codes to provide accurate reporting to programme managers.
* Management of break in learning process – audit & compliance check of learner folder and break in learning form for evidence of last date in learning, processing of break in learning details on PICS
* Producing PICS reporting as answering all queries received into PICs mailbox
* Coordinate FDOL (First Day or Learning) audits and evidence capture to support the start of funded learning.
* Clearing any Dlock errors and reporting to Head of onboarding weekly
* Correct ILR validation errors as identified through monthly submissions.
* Maintaining Estio and Firebrand’s Digital Apprenticeship Service
* Entering of data onto internal systems;

data entry of apprenticeship starts following quality control checks, apprentice ULN and EDRS data capture, new employer set up’s, assessor changes, breaks in learning and leaver non-achievers, pdf document conversions.

* Updating managers to ensure learner records on MIS/PICs are 100% accurate.
* Validate and process ILR data efficiently in accordance with ESFA Funding Rules and internal processes.
* Work through PDSAT's reports monthly and ensure any potential errors are resolved.

**Skills, experience & qualifications required - Essential**

• Excellent time management and organisational skills

• Excellent communication with a positive telephone manner and the ability to build rapport and maintain empathy with students and clients

• Ability to create and maintain accurate/accessible and organised documentation

• Ability to use email, internet applications, MS Windows operating system, including Excel and tracking tools to support this role

• Proactive, highly motivated, and adaptable to change, as the company and industry in which they are based is very fast paced and competitive

* Ability to manage tasks in order of priority.
* Ability to adapt to a fast paced and changing.