

# ASPIRATION TRAINING

**APPRENTICESHIP LEVY TRANSFER PROCESS  
RECEIVING EMPLOYERS GUIDE**

## WHAT IS A LEVY TRANSFER?

A levy transfer occurs when an apprenticeship levy paying company gifts their unspent levy funds to smaller companies and organisations (non-levy) to support growth within their business.

# APPRENTICESHIP LEVY TRANSFER PROCESS

## STEP 1

Sending employer calculates available spend.

## STEP 2

Both employers discuss and agree terms offline, through Aspiration Training.

## STEP 3

Receiving employer sets up apprenticeship service account online with support from Aspiration Training, if an account doesn't already exist.

## STEP 4

Receiving employer sends a screenshot of their apprenticeship account homepage including account ID to Aspiration Training.

## STEP 8

Sending employer gives final approval. The learner is live and ready to start their apprenticeship.

## STEP 7

Training provider adds learner details to the cohort and receiving employer approves these details.

## STEP 6

Receiving employer accepts connection request from sending employer, adding a learner cohort and selecting Aspiration Training as a training provider.

## STEP 5

Sending employer sends a connection request using the account ID from the receiving employer.



## HOW DOES IT WORK ON DIGITAL APPRENTICESHIP SERVICE (DAS) ACCOUNT?

Levy transfers take place using the Digital Apprenticeship Service (DAS) - this is an online portal that will connect both organisations. The information below sets out what you need to do to set up a levy transfer on the DAS.

1. Both the 'sending' and 'receiving' employers will need a DAS account in order to transfer the levy funds.
2. You can only be a sender or receiver at any one time, you cannot be both at the same time.
3. Each account on the DAS must include at least one:
  - Account owner
  - Organisation
  - PAYE scheme

To register a new account on the DAS, the receiving employer will need the following information:

- Account owner's email address
- Organisation's Companies House number, charity number, or public sector body name
- PAYE scheme's Government Gateway credentials

If the receiving employer cannot find their Government Gateway credentials, they should contact the HMRC helpdesk on 0300 200 3200.

# RECEIVING EMPLOYERS ACCEPTING DONATION REQUEST

## STEP 1:

Log in to your GOV.UK One account.

[Login or sign in here](#)

Click on the 'Finance' tab.

[Home](#) > [Education, training and skills](#) > [Further and higher education, skills and vocational training](#)

## Sign in to your apprenticeship service account

If you're an employer, sign in to this service to:

- create apprenticeship adverts
- accept employer agreements with the Department for Education (DfE)
- give account access to people within your organisation
- give training providers permission to do some things for you (such as creating adverts and reserving funds)

### Related content

[Employing an apprentice](#)

[Find an apprenticeship](#)

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## MY ACCOUNT

Account ID:

### Add your PAYE scheme to access your account

Add your organisation's PAYE scheme and accept your agreement with the Education and Skills Funding Agency to get funding for apprenticeship training.

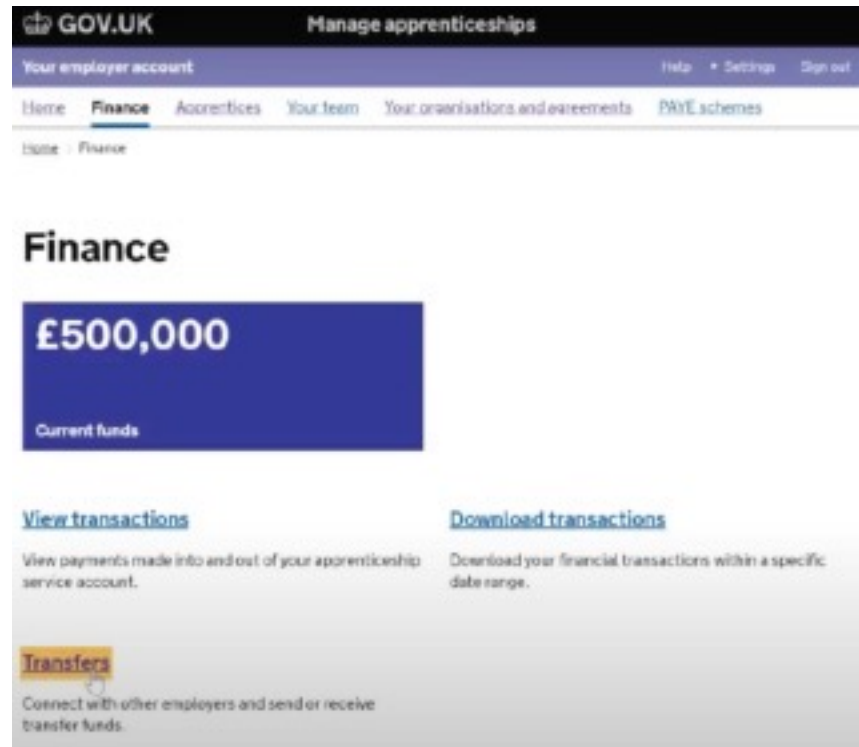
[Add your PAYE scheme](#)



# RECEIVING EMPLOYERS ACCEPTING DONATION REQUEST

## STEP 2:

Select 'Transfers'.



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### Finance

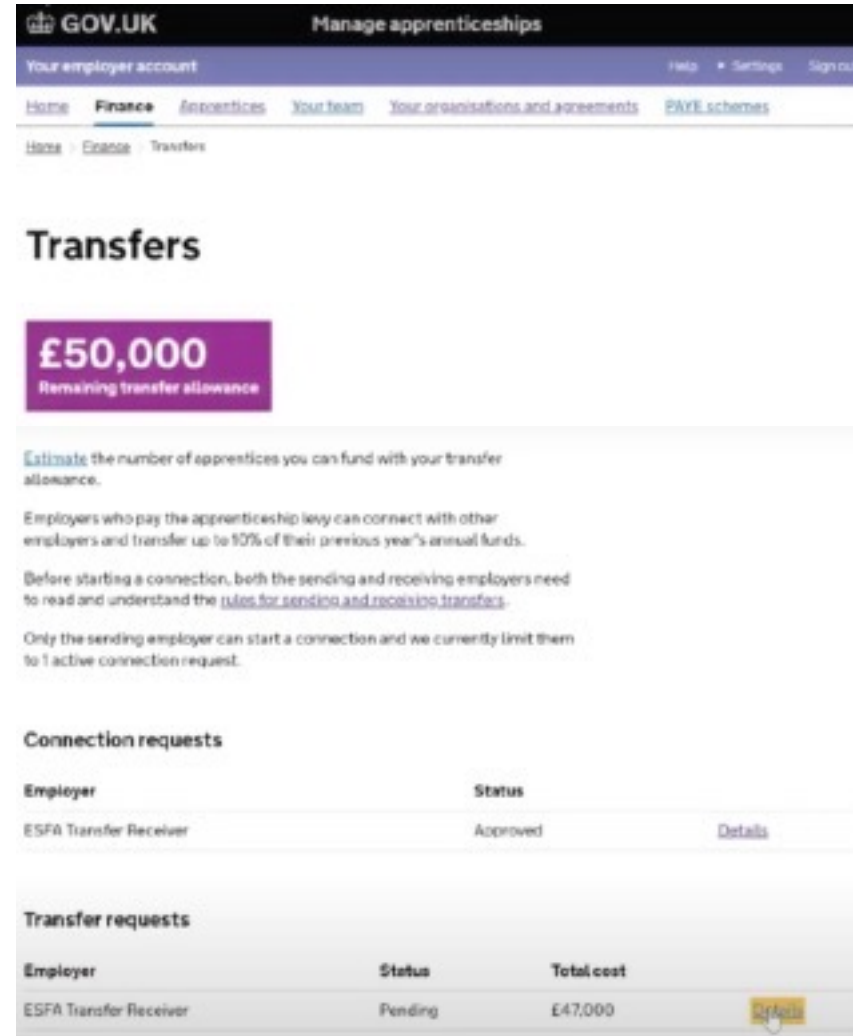
**£500,000**

Current funds

[View transactions](#)  
View payments made into and out of your apprenticeship service account.

[Download transactions](#)  
Download your financial transactions within a specific date range.

**Transfers**  
Connect with other employers and send or receive transfer funds.



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## Transfers

**£50,000**  
Remaining transfer allowance

[Estimate](#) the number of apprentices you can fund with your transfer allowance.

Employers who pay the apprenticeship levy can connect with other employers and transfer up to 50% 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 and we currently limit them to 1 active connection request.

### Connection requests

Employer	Status	
ESFA Transfer Receiver	Approved	<a href="#">Details</a>

### Transfer requests

Employer	Status	Total cost	
ESFA Transfer Receiver	Pending	£47,000	<a href="#">Details</a>

Scroll to 'Connection requests' (this will have your sending employers' details and say 'Pending'. Select 'Details' next to the sending employers name, then click 'Approve'.

**Do you want to approve this transfer request?**

☒ Yes, approve the request

☐ No, reject the request

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

## STEP 3:

Once you have approved the connection request, it will give you the option to start adding the apprentices.

Select the organisation that will be funding your apprentice.

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### 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](#) >

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### Choose organisation

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

☐ Demonsstrate One Ltd

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

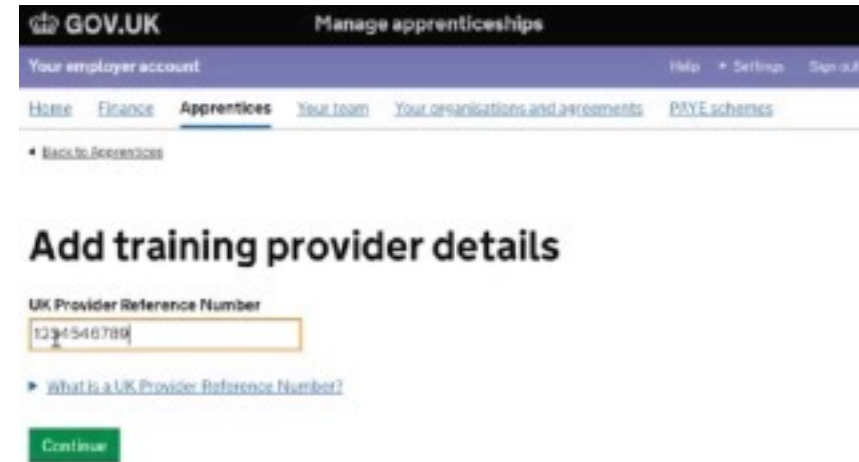
[Continue](#)

## STEP 4:

Next, add training provider, using the UK Provider Reference Number of: 10000421.

Select 'Yes, I would like to use Aspiration Training Limited'.

Select 'I would like my provider to add apprentices'.



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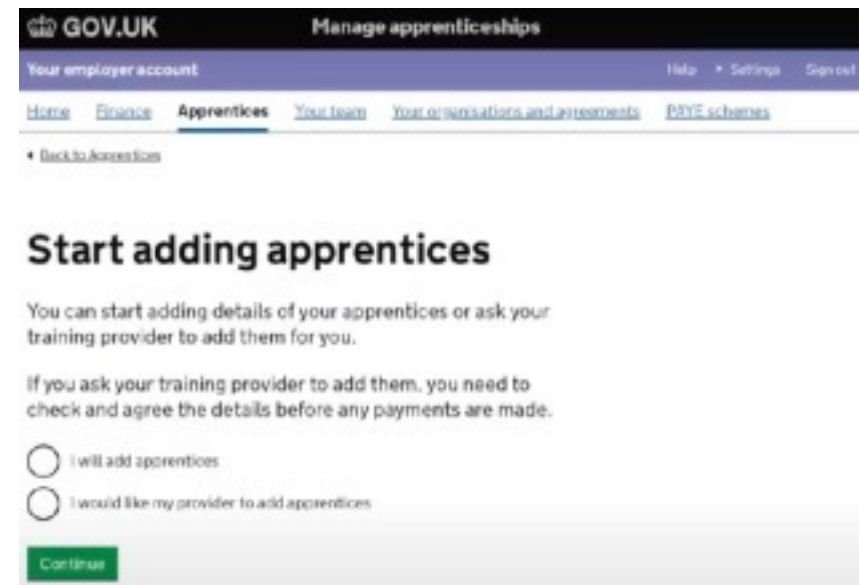
### Add training provider details

UK Provider Reference Number

123456789

[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



## STEP 5:

In the message box, please enter the names of your learners that the levy transfer is funding and the name of the levy donor used. Once complete, click 'Send'.

This will send a notification to Aspiration Training, who will then add the learner details once the enrolment has been completed.

After the details have been entered by Aspiration Training, you will receive a notification from the DAS stating Aspiration Training has created a cohort and for you to go in an approve.

This will be situated in 'Apprentices', then 'Apprentice Requests'.

Then select 'Ready for review', then 'Details', then 'Approve'.

### Message for your training provider

Let **ASPIRATION TRAINING LIMITED** know what you'd like them to do next.

Message (optional)

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Home > Apprentices

## Apprentices

[Add an apprentice](#)  
 Add new apprentices or ask your training provider to add them.

[Apprentice requests](#)  
 Review, edit, approve and add more apprentices.

[Manage your apprentices](#)  
 View approved apprentices, update

[Set payment order](#)  
 View and change the order in which

## STEP 6:

Once you have approved this it will then show in 'with transfer sending employer' box.

Once the sending employer has approved this, the learner is then live on the apprenticeship account.

Should you need to amend, stop or pause your apprentice, you can do this by going to 'Apprentices', then 'Manage your apprentice'.

Please liaise with Aspiration Training when stopping your apprentices to ensure the stop date matches the recorded period of learning.

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### Apprentice requests

[Add new apprentice](#)

0 Ready to review	0 With training providers	0 Drafts	0 With transfer sending employers
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You currently have 0 apprentices ready for review

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### Apprentices

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<p><a href="#">Add an apprentice</a></p> <p>Add new apprentices or ask your training provider to add them.</p>	<p><a href="#">Apprentice requests</a></p> <p>Review, edit, approve and add more apprentices.</p>
<p><a href="#">Manage your apprentices</a></p> <p>View approved apprentices, update details of existing apprentices, change training providers or stop and pause payments to training providers.</p>	<p><a href="#">Set payment order</a></p> <p>View and change the order in which your providers are paid from your available funds.</p>

## USEFUL LINKS

Click the links below for useful videos on YouTube, from creating your apprenticeship account to adding an apprentice:

[View and apply for transfer opportunities](#)

[Adding apprentices funded by transfer](#)

[Adding an apprentice to an account](#)

[What is the apprenticeship service?](#)

## NEED ANY FURTHER HELP?

Please contact your local Aspiration Training Business Development Manager or call 01527 359 646, Monday to Friday, 8:30am - 5:00pm, or you can email [enquiries@aspirationtraining.com](mailto:enquiries@aspirationtraining.com).



The Apprenticeship Service (TAS) is operated by the education and Skills Funding Agency (ESFA) and will be subject to ongoing change and development.

Aspiration Training have released this guide at a time that is shown to be accurate and correct at the time of publication (January 2020) but accept no liability or responsibility for any inaccuracies now, or in the future. This guide has been produced as a supporting document for employers and is not intended to replace ESFA guidance or technical instruction. If you would like any further help with this guide, please get in touch.