

Early Years Thirty Hour Entitlement Provider Portal Handbook

last updated for the Summer 2020 (3.72) release

Handbook

CAPITA

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Early Years Thirty Hour Entitlement Provider Portal Handbook/Summer 2020 (3.72)/08-07-2020

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01 Document Change Control

Date	Release	Description
Summer	3.72	30 Hour Entitlement Check
2020		The Eligible From and To dates fields in v4 Client has been amended to be editable fields, enabling these dates to be extended.
		For more information see <i>Managing Early Years Payment</i> on <u>One Publication</u> website.
		30 Hours Check - Run a New Check
		Run a New Check has been updated with new functionalities as follow:
		 'Find a child' search box has been removed. The Provider selection drop down list now permanently resides above the search fields.
		 The search fields to enter a Childs Forename /Surname will appear after a Provider is selected. All other fields will remain greyed out.
		Selecting a Child from the search list will auto populate all other field with known data in the system. The fields that are left blank will need to be manually filled in.
		A 'Clear' button is available to clear the data from all fields. This allows for a new search to begin.
		View Details is now available. This allows Users to see the full details of a Child prior to making a selection.
		The 'Run Check' button, is disabled until all fields have been filled in using the correct format.
		A 'Re-run check' and/or 'Run new Check' button is now is available to use after an eligibility check has failed due to Child is Not Found or an error occurs.
		'Child Not Found' is a new button on the Search screen. This allows for an Ad Hoc Child to be added against a Provider for whom an eligibility check can be run.
		 Changing a Provider – An alert message is displayed If different Provider is selected after a child's name has been entered in the search field.
		For more information see <u>Running a New Check</u> on page 30

Date	Release	Description
Autumn	3.67	30 Hour Entitlement Portal
2018		 Additional filter options/display fields are shown to parents when searching for Providers they wish to share their entitlement details with.
		For more information, see <u>Sharing Entitlement Details with</u> <u>Providers</u> on page26.
		New message template called: Thirty Hours Free Childcare - Citizen Expression of interest sends Providers an email when a parent shares their 30-hour entitlement details with.
		For more information, see <u>30 Hours Configuration</u> on page 25
		30 Hours Checks
		Thirty Hours Childcare icon now displays the number of notifications from parents that require action from the provider.
		For more information see <u>Introduction to the Expiration</u> <u>Dashboard</u> on page 37.
		 Multiple records are no longer returned when using Run a new Check - in 30 Hours Childcare.
		Expiration Dashboard
		 The column order on the Expiration Dashboard now shows the Earliest Date to take up 30 Hrs place field before eligibility start date.
		A new filter has been added to the Eligibility Filter called: Eligibility has ended but code is still in grace. A new configuration option is available to allow LAs to set the default value in the Eligibility Filter and the Number of Days.
		For more information, see <u>Displaying Children whose Eligibility</u> <u>is due to Expire</u> on page 38.

02 Introduction to the Thirty Hour Entitlement Portal

Overview

The Thirty Hour Entitlement portal enables providers and Local Authorities to check the eligibility of working parents of 3 and 4-year-olds to an extra 15 hours of free childcare in addition to the universal entitlement of 15 hours per week.

Parents apply to HMRC for extended childcare and, if they are eligible, they are given an eligibility code to take to their childcare provider. Parents can check the validity of their eligibility code using the Citizen portal and share the information with providers.

Providers can use the Provider Portal to check the validity of eligibility codes using the DWP Eligibility Checking Service (ECS).

The One v4 Client is updated with the check information, so that Local Authorities can see which children are receiving this benefit and the checks that have been made.

When the child's forename and surname are used to perform an ad hoc check for 30 hours eligibility, if at any time in the future this child is added to the provider via the Headcount portal, the user is asked if this is the same child and the details of the ad hoc check (date of birth and eligibility code) are copied across to the Headcount portal. For more information, see <u>Running a</u> <u>New Check</u> on page *30*.

More Information: One Early Years Headcount Provider Portal handbook, One Early Years 30 Hour Entitlement Citizen Portal handbook and the One Early Years - Managing Early Years Payments handbook available on the One Publications website.

Advice to Local Authorities

- Local Authorities can configure how their providers record claims for extended hours on the Headcount grid in Provider Portal. After consulting with Early Years customers, it was decided that Capita would provide two options for this:
 - Providers recording their claims for universal hours and extended hours in separate columns. With this option, providers will only be able to enter values in the extended hours columns for children that are eligible for extended childcare. Local Authorities that have decided to use this option are planning to update their declaration forms and privacy notices so that providers ask parents to declare whether their children are using their universal entitlement, extended entitlement, or both with them. Local Authorities believe that receiving the hours split out like this will help when it comes to resolving apportionments.
 - Providers recording their claims for universal hours and extended hours in the same column. With this option, providers will only be able to record claimed hours up to the extended hours cap for children that are eligible for extended childcare. For children that are not eligible for extended childcare, providers will only be able record claimed hours up to the universal cap. Local Authorities that preferred this option believed that their providers would not know if universal hours or extended hours were being claimed with them because parents would not be familiar with the concept.

This is configured using the **Combine Universal and Extended Pay Hours Columns** option via **Provider Portal | Headcount | Headcount Configuration.**

It is advised that Local Authorities do not select the option of combining the columns for claiming universal and extended hours for their providers on Headcount, as well as giving them the ability to record multiple line attendance. This scenario can cause issues for providers where they cannot submit their Headcount task because the system calculates that the universal cap has been reached, despite the child still potentially having extended hours remaining that can be claimed for. More information can be found in KB-476377.

These options are configured using the **Combine Universal and Extended Pay Hours Columns** option and the **Add Line** check box via **Provider Portal | Headcount | Headcount Configuration**.

- After consultation with Local Authorities, it was decided that there would not be a requirement for extended caps to be set differently to universal caps, because they are both 15 hours per week. As a result, different caps cannot be set for universal and extended hours.
- The Offers Extended Childcare checkbox in Early Years v4 can be set for each service and signifies whether that service offers extended childcare. Services that do not offer extended childcare places should have a cross in this check box, which results in this service being unable to claim extended hours for their children on Headcount. This check box is ticked by default and it is recommended that Local Authorities change the state of this check box where necessary during their set up for the term that starts on 1st September 2017.

This is updated on the **Service Provision Details** screen in the v4 Client via **Focus | Early Years | Search Service Provision**. There is a global configuration setting for Local Authorities which controls whether they fund children that are found to be eligible in the middle of the term after the child's third birthday (as opposed to funding them from the start of the following term). If the Local Authority wants to fund these children, then providers will be able to claim extended hours for them on Headcount and the Local Authority will be able to process payments for them in Early Years v4. By default, funding for mid-term eligible children is disabled. It is recommended that Local Authorities decide how they would like to manage this process during their set up for the term that starts on 1st September 2017.

This set up on the **Mid-Term Funding for Extended Childcare** panel in the v4 Client via **Focus** | **Early Years** | **Early Years Setup** | **Payment Setup Options**.

Weeks and hours information can be pre-populated on Headcount for providers based on settings configured by the Local Authority. The values that are pre-populated are those that are stored against the funded service in Early Years v4 at the point the Headcount task is created. Local Authorities can use the Carry Over routine to efficiently populate values against the funded service. For example, ahead of the term that starts on the 1st September 2017, Local Authorities may choose to carry over paid hours from the summer term to the interim hours of the autumn term. When the Local Authority creates the Forecast Headcount task, these carried over hours will be pre-populated for providers, which will hopefully save them time when entering data. It is also worth noting that new functionality has been introduced in the Carry Over routine, which gives Local Authorities the ability to carry over interim weeks to actual weeks within the same term.

This option is set on the **Headcount Grid Configuration** panel via **Provider Portal** | **Headcount | Headcount Configuration**.

The Carry Over routine is accessed in the v4 Client via Focus | Early Years | Carry Over/Update.

Local Authorities can define each supplement / SFF code whether it applies to universal, extended hours or both. This gives flexibility if the Local Authority wants to have a different hourly rate between extended hours and universal hours, for example, to pay EYPP / Deprivation supplements to just the universal hours claimed.

This is set up in the v4 Client by clicking the **Add** button on the **Single Funding Formulas** panel via **Focus | Early Years | Early Years Setup | Payment Setup Options**.

Automatic rechecking functionality is available and the parameters controlling this are defined by the Local Authority. The time at which the rechecking runs is flexible and is defined using a scheduled task. If required, the scheduled task can be set to run daily, but the Local Authority can run it at any time. The check records that will be included in the automatic recheck are based on a configurable number of days before and after the end date of an eligible check record. Providers and the Local Authority can then view the results of these rechecks.

The scheduled task is set up in the v4 Client via **Tools | Administration | Schedule Task**. The batch size and length of time between checks is configured via **Provider Portal | 30 Hours Free Childcare | Configuration**.

- A number of v4 Early Years routines, processes and screens have been modified to accommodate extended hours functionality. This includes additional database fields. To report on extended hours, you will need to consider amending your existing reports or creating additional ones.
- To know when a child is reaching the end date of their eligibility or are in their grace period, Local Authorities can:
 - Grant themselves access to their providers' accounts so that they can view the Expiration Dashboard on a provider level and monitor children that are nearing the end date or are in their grace period.

- Create a report to provide the required information.
- View the information on the Student Details | Early Years Additional Information panel.

More Information:

For information regarding configuring the Provider portal, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*.

For information regarding setting up the Thirty Hour Entitlement portal, refer to the Technical Guide: *Setting Up One Early Years Thirty Hours Entitlement for Local Authorities.*

For information regarding Early Years Headcount, refer to the Handbook: One Early Years Headcount Provider Portal.

For information regarding setting up Early Years in the v4 Client, refer to the Handbook: One Early Years Setup

For information regarding making Early Years payments in the v4 Client, refer to the Handbook: *One Early Years - Managing Early Years Payments.*

For information regarding creating a scheduled task, refer to the Technical Guide: v4 Scheduled Tasks

All documents are available on the One Publications website (www.onepublications.com).

Using this Handbook

This handbook is intended for the Early Years team and One Coordinator at the Local Authority.

The first chapter provides an overview of Provider portal administration.

The second chapter covers setting up user accounts, managing user access and assigning permissions.

The third chapter describes configuring the link to the DWP Eligibility Checking Service (ECS).

The fourth chapter provides an overview of the processes performed by Early Years providers to run checks and review previous checks.

The fifth chapter covers using the Expiration Dashboard to display children who are nearing their eligibility end date.

The sixth chapter describes the process in the v4 Client to update the student details record with information about Thirty Hour Entitlement checks that have been run.

Home Page

Displaying the Home Page

When a user logs into the Provider portal, the home page displayed depends on the permissions that have been assigned.

If they only have permission as a 30 Hours User, the **Thirty Hour Entitlement Portal** home page is displayed.

Welcome to the Thirty Ho The Department for Education (DfE) provide eligibility codes issued by HMRC to working	ur Entitlement Portal s an Eligibility Checking System (ECS) to allow you to ch parents eligible for 30 Hours Free Childcare.	eck online and in real time the validity of
ECS Configuration	Configuration	Run a New Check
Review Previous Checks	Expiration Dashboard	

If they also have permission to access another Provider portal module and the Local Authority has the Headcount licence, the **30 Hours Free Childcare** tile is displayed on the **Provider Portal** home page as shown in the following graphic.

					Provider Portal
A Home BetterStart -	Self Update • EPM •	Headcount - 30 Hours	s Free Childcare •	Two Year Old Funding -	Disability Access Fund +
					LINE USER - Ů Sign out
Welcome to Below, you wil Click on the Tv Headcount ico	the Provider Porta see a vast range o vo Year Old Funding n to submit.	al f services available f icon to approve. If y	to you. If you h rou have heado	ave two year old c count information to	hildren to approve. submit. Click on the
30 Hours Free Childcare	Better Start	A Disability Access Fund	Education P Monitoring	lan Headcoi	Int Self Update
Two Year Old Funding					

For more information about assigning permissions, see <u>Assigning Permissions</u> on page 22.

Portal Administration

The Administration menu route enables the Local Authority to perform the following processes:

- Manage the setup and configuration of the website.
- Manage user access to providers and services.
- Review users.

The **30 Hours Free Childcare | Administrator** menu route enables the Local Authority Early Years Admin Officer to perform ECS Configuration. For more information, see <u>ECS</u> <u>Configuration</u> on page 23.

Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to: <u>https://support.google.com/chrome/answer/95416?hl=en-GB</u>

Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the Home button to display the Home page
Change Password	Click the drop-down adjacent to the user name and select Change Password. Enter your Current password, New password and Confirm new password. Click the Change password button.
Change Secret Question	Click the drop-down adjacent to the user name and select Change Secret Question. Enter your Current Password, Select a New Secret Question and enter a Secret Answer. Click the Save button. NOTE: This functionality is only available if second factor authentication is enabled.
Enable Two Step Verification	Click the drop-down adjacent to the user name and select Two Step Verification . Select Email from the Preferred method drop-down. Click the Save button. You will be signed out and will need to sign in again.
Disable Two Step Verification	Click the drop-down adjacent to the user name and select Two Step Verification . Select No Two Step Verification from the Preferred method drop-down. Click the Save button. You will be signed out and will need to sign in again.
Sign out	Click the Sign Out button adjacent to the user name.

Configuring the Provider Portal

1. Select Administration | Site Setup | Configuration to display the Manage Configurations page.

Configuration Key	Configuration Value	A
Include the admin on emails sent	OFF	
The from email address used when messages are sent	admin@capita.co.uk	
When sending lots of emails, batch them up into groups of this size	30	
Maximum messages to show on the home page	10	
Is second factor authentication enabled	OFF	
Is Mini Profiler enabled	ON	
The Portal url		
Google Analytics tracking id		
Account lockout time span in minutes	4	
Maximum failed Verification Code attempts	9	
Pop-up message expiry time in seconds	16	

- 2. For each Configuration Key, change the Configuration Value, if required:
- 3. If required, set Include the admin on emails sent to On.
- 4. Enter an email address for: The from email address used when messages are sent.
- 5. Enter a number for: When sending lots of emails batch them up into groups of this size.
- 6. Enter the number of Maximum messages to show on the home page.
- 7. If required, set Is second factor authentication enabled to On.
- 8. If required, set Is Mini Profile enabled to On.
- 9. If required, enter The Portal url.
- 10. If required, enter the Google Analytics tracking id.
- 11. If required, enter the Account lockout time span in minutes.
- 12. If required, enter the Maximum failed Verification Code attempts.
- 13. If required, enter the **Pop-up message expiry time in seconds**.
- 14. Click the **Save** button.

More Information:

For more information regarding portal configuration, refer to the *Technical Guide:* **Deploying and Configuring the One Provider Self Service Portal for Local Authorities**, which is available on <u>one</u> <u>Publications</u> website.

Text Customisation

All text, field labels and messages that are displayed on the website can be configured.

Туре	Name	Description
Site Notices	Announcements and Welcome Text	Displayed when the user logs into the portal.
	Provider Home Guidance Text	Displayed on the Home page.
	About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Text is displayed when the user clicks the corresponding button at the bottom of each page.
Text Resources		Field labels, user messages and tooltips (text displayed when a user hovers the mouse over a field).
Address	Address Registration	Guidance text displayed for address fields.
Module specific		Guidance text and other text displayed on module-specific pages.
Email		Text for standard emails and messages relating to managing user accounts.
Message	Message Report Sent Body	Text for the message to be sent to a portal user when a new report is available to view. NB. Not used in Training Manager.
Report		Guidance text for reports.
Site Titles	Site Title	Displayed at the top right-hand side of every page.
Tooltip	Tooltip for New Password	Displayed when user sets up a new password.

1. Select Administration | Text Customisation to display the Text Customisation page.

Text Custom	nisation	
Choose a text Category	About	•
or Search	Search	
Choose a text Category or Search Search Default Welsh		
Add		
Warning! This text ha	as not been defined.	×

- 2. From the Choose a text category drop-down, select the category of text to be configured.
- 3. Alternatively, enter search criteria, click the **Search** button and select the text.
- 4. Select the **Default** or **Welsh** tab to determine the text language.

5. Click the **Add** button.

About (Default)	
Cancel Save ダ ♥ ■ 図 B I 田田律律 ◎ 國 書	How to Formal
Text	
Fext	

- 6. Enter required text in the formatting panel. Formatting buttons are provided above the panel.
- 7. The formatted text is displayed beneath.
- 8. Click the **Save** button.

Guidance Notes

Guidance text can be configured to display on specific screens.

Updating Guidance Notes

Guidance notes are configured for each screen using the text customisation facility.

1. Select Administration | Site Setup | Text Customisation to display the Text Customisation page.

	Customisation	
About		*
Default	Welsh	
Add		
Warning	This text has not been defined.	×

- 2. Click the drop-down to display a list of available text that can be customised.
- 3. Scroll to the required list of screens e.g. Thirty Hour Entitlement.

hoose a te ategory	ext	About	
	or Search		٩
		EPM	
Default	Welsh	EPM Guidance Text	
		Thirty Hour Entitlement	
Add		Expiration Dashboard Guidance Text	
		Review Checks Guidance Text	
		Run A New Check Guidance Text	
		Thirty Hour Entitlement Guidance Text	-
Warning!	This text has not	School Admissions	
		Home Page Guidance Text	

4. Select the required screen.

ioose a t itegory	ext	Expiration Dashboard Guidance Text	Ÿ
	or Search	Search	
Default	Welsh		
Delete	Edit		

5. Click the **Edit** button.

Expiration Dashboard Guidance Text (Default)	
ッ (*) 🗉 🔟 🗷 / 注注:詳述 🌒 📓 🚍	How to Format
Use this screen to track eligibility which is due to expire.	
Use this screen to track eligibility which is due to expire.	

6. Make the required changes and click the **Save** button.

Message Templates

Messages can be composed and sent to one or more users. The message can be free text or can use a pre-defined template.

Delete	Edit	
0 - 16 1 1		
Self Up	date On Approve Email Template	
Subject		
Se Se	elf Update Approval	
Message		

Editing a Template

- 1. Select Administration | Site Setup | Message Templates to display the Message Templates page.
- 2. Select a Template.
- 3. Click the Edit button to display the Edit Template page.

Template Name *	Self Update On Submit Email Template	
Outlinet.	B Orth Underland Outbraining	
Subject *	Sei Opdate Submission	
		Message *
🤊 🍽 🗮 🔄 🖪 🖌 🗄	[] [] [] [] [] [] [] [] [] [] [] [] []	How to Format
A request to [\$\$Submission	nAction\$\$] [\$\$SubmissionArea\$\$] has been submitted to [\$\$ServiceName\$\$] at [\$\$ProviderName\$\$].	
\$\$ProviderComments\$\$]		
Services can be accessed through Self Update.		
orrest Cours		
Cancel Save		
Cancel Save		
Cancel Save		
Cancel Save Preview A request to [\$\$\$ubmiss	ionAction\$\$] [\$\$SubmissionArea\$\$] has been submitted to [\$\$ServiceName\$\$] at [\$\$ProviderName\$\$].	
Cancel Save Preview A request to [\$\$\$ubmiss [\$\$ProviderComments5]	sionAction\$\$] [\$\$SubmissionArea\$\$] has been submitted to [\$\$ServiceName\$\$] at [\$\$ProviderName\$\$].	

4. Make the required changes to the **Template Name**, **Subject** or **Message** text. Formatting buttons are provided above the panel.

The amended text is displayed in the **Preview**.

5. Click the **Save** button.

03 Managing Users

Introduction

NOTE: Users are created, and user permissions are set up in the v4 Client.

In the Thirty Hour Entitlement portal there are two types of users, Provider users and Local Authority administrators (Early Years Admin Officers). Provider users can run checks and review previous checks. LA administrators can manage access to providers, configure the link to the Eligibility Checking Service (ECS) and perform portal administration.

User creation is a three-stage process.

Firstly, if they do not already exist, a One Administrator must create the portal user in the One v4 Client via **Tools | Administration | User Management | User Accounts** with a user name and unique email address.

Secondly, the user must be assigned to the correct security group in the v4 Client. Permissions are assigned to a security group in the v4 Client via **Tools | Permissions | User Group Processes**.

Finally, after a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal via the **Manage Access** area.

More Information: *Managing Users in v4* chapter in the *One System – Managing Users, Groups & Permissions* handbook available on the <u>One Publications</u> website.

Creating a Portal User Account

To create a new portal user account, the One Administrator must:

- 1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools |** Administration | User Management | User Account.
- 2. Send the log in details (user name and initial password) to the new user via email.

Activating a Portal User Account

A new Provider portal user needs to activate their user account.

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they <u>must</u> click on the activation link in the email to verify their email address. The user must:

- 1. Click on the unique link contained in the email.
- 2. Enter their user name and original password.

They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

More Information: For more information regarding user setup and permissions, refer to the *Technical Guide: Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on <u>One</u> <u>Publications</u> website

Managing User Access

Granting Access to Providers and Services

After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

To update access for the selected user:

1. Select Administration | Manage Access to display the Manage Access page.



2. Select a User to display their Role and a list of services to which they have access.



3. Click the Allow Access to All Services button or click the Change Access button to display the Amend Access panel.

Manage Access	5
User • Role •	
Services User has access to:	The user doesn't have access to any provider funded services
Amend Access:	Provider • Please select • •

- 4. Select a **Provider from the drop-down list** to display their services.
- 5. Select one or more services.
- 6. Click the **Save** button.

Removing Access from a User

To remove a user's access to all services:

- 1. Select Administration | Manage Access to display the Manage Access page.
- 2. Select a User to display a list of services to which they have access.

Manage Access	
User •	Log T5USER - T5user
Role *	Headcount / TYOF / Early Years Self Update
Services User has access to:	Bumble Bee Nursery Full Day Care
	Change Access Allow Access To All Services Remove All

3. Click the **Remove All** button.

Logging into the Portal

A user with an active user account can log into the portal.

Home	Provider Porta
Log In	Welcome to the provider portal
Username	
Password	
Cog In	
Forgotten your userna	

Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.

Retrieving Your User Name

If you forget your user name:

1. From the portal Log In screen, click the Forgotten your username? link to display the Forgotten Username page.

Forgotten U	Forgotten Username					
To retrieve your us	ername, enter the registere	ed email address associated with your account				
Email Address	Submit]				

- 2. Enter your registered Email Address and click the Submit button.
- 3. Access your registered email account and open the email received to retrieve your user name.

Resetting Your Portal Password

To reset your password:

1. From the portal Log In screen, click the Forgotten your password? link to display the Forgotten Password page.

Forgotten Password To reset your password enter the requested account details				
User name	A			
Email Address	٩			
	Submit			

- 2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
- 3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.

🖀 Home				
Secret Questi	ON answer to your secret question			
Secret Question	Month of Birth			
Submit Forgotten your secret answer?				

- 4. Access your registered email account and open the email received.
- 5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

If you need to reset your secret question:

1. From the portal Secret Question screen, click the Forgotten your secret answer? link.

Secret Question/Answer Reset				
To reset your secre	et question enter the reque	sted account details		
User name •	۵]		
Email Address *	•]		
	Submit			

- 2. Enter your User name and registered Email Address and click the Submit button.
- 3. Follow the reset instructions in the email.

More Information:

For more information about enabling second factor authentication, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* available on the One Publications website (<u>www.onepublications.com</u>).

Setting Up Two Step Verification

Introduction

If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



- 2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
- 3. Click the Save button.

You will be signed out and will need to sign in again.

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

	🛔 📃 👻 🙂 Sign out
Two Step Verification	
Two Step Verification is our way to make your data more secure.	
If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.	
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.	
Changing your preference will sign you out, and you will need to sign in again.	
Preferred method	
+) Email •	
Save	

- 2. Select No Two Step Verification from the Preferred method drop-down.
- 3. Click the Save button.

You will be signed out and will need to sign in again.

Reviewing Users

Introduction

The **Review Users** page is used to view the users that are currently registered to use the Provider portal, to update their email address and enable them to update their password. It is also used to reset a user account that is inactive in the v4 Client.

NOTE: When a system administrator logs into the portal, their account is displayed as read-only.

Viewing User Details

1. Select Administration | Review User to display the Review Users page.

Name		Search				
2 Records Found					Page 5 of 5 << Prev	1 2 3 4 5 Next>>
Username	Description	Active	Registered	Email	Groups	Action
TestUser	Admin user for EPM	~	×	Testuser14@onetestsr	EPMADMIN	Reset Password, Reset Account
VPADM	vpadm	~	~	testuser10@onetestsm	PP Headcount Adm	Reset Password

2. If required, enter a partial **User Name**, **Description** or **Email** address and click the **Search** button.

Updating a User Email Address

To update the user's Email address:

- 1. Select Administration | Review User to display the Review Users page.
- 2. Enter a new **Email** address and click the adjacent update button.

Resetting a User Password

If a user has forgotten their password, to enable them to reset their password:

- 1. Select Administration | Review User to display the Review Users page.
- 2. Click the **Reset Password** link to send an email to the current **Email** address asking the user to update their password.

NOTE: Clicking the **Reset Password** link displays the **Reset Account** link in the **Action** column until the user resets their password. When the user resets their password, they receive an email to let them know that their password has been changed successfully. The **Reset Account** link is then removed from the screen.

Resetting a User Account

If the user account is set to inactive in the v4 Client, the **Reset Account** link is displayed in the **Action** column and the **Active** status is displayed as a red cross as shown in the following graphic:

Review Use	eview Users						
Name 🖋	Search				Page 2 of 5	1 2 3 4 5 Next>>	
Username	Description	Active	Registered	Email	Groups	Action	
EPMUSER	EPM user	×	~	Testuser17@onetestsr	EPMUSERGROUP	Reset Password,Reset Account	

To reset an inactive account and set the status to active in the v4 Client:

- 1. Select Administration | Review User to display the Review Users page.
- 2. Click the Reset Account link.

NOTE: The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see <u>Resetting a User Password</u> on page 21

Assigning Permissions

Business processes are assigned to a user group in the v4 Client via **Tools | Permissions | User Group Processes**.

Permission to Access 30 Hours Free Childcare

To access 30 Hours, the permission required is **Read-Write-Delete** for the business process **Thirty Hour Entitlement User** under the **Provider Portal** main business process.

35	sions Editor [PP				
v	e				
	Name	Read	Read-Write	Read-Write-Delete	Deny
	Provider Portal		*		
	Better Start Administrator				V
	Better Start User				V
	Early Years Pupil Premium				<i>~</i>
	EPM Administrator				<i>~</i>
	EPM Base				V
	EPM Plan				V
	EPM Reporter				V
	EPM Services				V
	EPM User				V
	General Site Administrator				V
	Headcount Site Administrator				
	Headcount Task Viewer				v
	Headcount User				V
	School Admissions - Ranking				V
	School Admissions - Update In Year Offer Statuses				v
	School Admissions - Verification Siblings				V
	School Admissions - View Applications & Allocations				V
	Self Update				v
	Self Update Administration				V
	Self Update Early Years				V
	Thirty Hour Entitlement User		 Image: A set of the set of the		
	TM Site Administrator				v
	Training				V
	TYOF Childrens Centre User				v
	TYOF Funding Manager				v
	TYOF Provider User				V
	TYOF Site Administrator				<i></i>

04 Thirty Hours Administration ECS Configuration



Select ECS Configuration from the **30 Hours Free Childcare | Administrator** menu to display the ECS Configuration page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page click the **ECS Configuration** button.

Configuring the Link to the ECS

ECS Configuration

The ECS (Eligibility Checking Service) Settings panel is used to store the credentials and information used for connection to the Department for Work and Pensions (DWP) online checking service

NOTE: When using a live environment, the **ECS Environment** must always be **Live**. If using in a test environment, the **ECS Environment** must be **Sandpit**.

ECS Settings

ECS Settings	
ECS Environment	
Live	•
ECS Local Authori	ty
Capita One	
ECS Username Capita One18675	
ECS Password	
Update ECS Pass	word
ECS System Status	5
Test	

- 1. From the ECS Environment drop-down list select Live.
- 2. Enter your ECS Local Authority value.
- 3. Enter your ECS Username.
- 4. Click the Save button.
- 5. Click the **Update ECS Password** link to display the password fields.
- 6. Enter your ECS Account password in both fields.
- 7. Click the Save button.
- 8. If you have changed the **ECS Environment** value, perform an IIS reset on the Provider Portal web server.

NOTE: Changing the **ECS Environment** affects both Early Years Pupil Premium and 30 Hours Entitlement.

ECS Override Settings

If it is necessary to override the default address for connection to the DfE Eligibility Checking Service (ECS), complete the following:

1. Enter the following URL into the ECS Service URI Override field. https://ecs.education.gov.uk/fsm.lawebservice/20170701/OnlineQueryService.svc

ECS Settings	ECS Override Settings
ECS Environment	These 'override' settings will normally be empty. They should only be set after guidance
Live	from Capita.
ECS Local Authority	ECS Service IIRI Override
Capita One	
ECS Username	ECS Service Version Override
Capita One18675	
ECS Password	Batch Size /Records)
Update ECS Password	3
ECS System Status	Pachask class (Minutes)
Test	
	WCF Open / Close Timeout (Mins)
	WCF Send / Receive Timeout (Mins)

NOTE: These setting will normally be empty. They should only be set after guidance from Capita.

- 2. Click the Save button.
- 3. Reset the Portal application to reload the changes (either IIS Reset, or re-cycle the Application Pool running the Portal application).

Setting Up Automatic Recheck

A scheduled task is set up on the application server to automatically recheck a child's eligibility. If required, the scheduled task can be set to run daily, but the Local Authority can run it at any time. The task uses the parameters configured on the **30 Hours Free Childcare Configuration** page to determine which entitlements to recheck. For more information, see 30 Hours Configuration on page

The task determines which checks to do and splits them into batches of a configured size. It submits the batches to the ECS. Periodically, a timed integration server event queries the ECS for completed batches and downloads the results.

On the **ECS Configuration** page, the batch size and length of time between checks can be configured by the Local Authority. To change the parameters:

- 1. Select ECS Configuration from the 30 Hours Free Childcare | Administrator menu to display the ECS Configuration page.
- 2. Alternatively, on the **Thirty Hour Entitlement Portal** home page click the **ECS Configuration** button.
- 3. If required, enter a Batch Size (Records).
- 4. If required, enter a Recheck sleep (Minutes).
- 5. Click the Save button.

30 Hours Configuration

The **30 Hours Free Childcare Configuration** page is used to set configuration values that are used in the portal.

The **Recheck Scheduled Task Configuration** panel enables the Local Authority to define the parameters used by the automatic recheck scheduled task. The scheduled task compares the child's eligibility end date with the current date to determine whether to perform an automatic check. The Local Authority can set a value for the **Days before Eligibility End Date to start rechecking** and **Days after Eligibility End Date to continue rechecking**.

1. Select **Configuration** from the **30 Hours Free Childcare | Administrator** menu to display the **30 Hours Free Childcare Configuration** page.

Alternatively, on the Thirty Hour Entitlement Portal home page click the Configuration button.

30 Hours Free Childcare Configurat	ion	
General Configuration		
Configuration Key	Configuration Value	A
Child's name is required on the check screen		
Citizen Share Eligibility To Provider Template	Thirty Hours Free Childcare - Citizen Expression of interest	
Eligibility Filter	Grace Period Expired in the last 180 days	
No of Days before/after expiration	180	
Re-Check Scheduled Task Configuration		
Configuration Key	Configuration Value	▲
Days before Eligibility End Date to start rechecking.	10	
Days after Eligibility End Date to continue rechecking.	60	
If the scheduled task ran today it would automatically recheck any eligit dynamically calculated using the parameters above). Any changes will be The scheduled task is enabled and last ran 26/Oct/2018 14:00, it will	ollity whose end date lies in the range of 05/Nov/2018 back to 27/Aug/2018 e picked up the next time the task runs. next run 26/Oct/2018 14:15.	s (this date range is

- 2. If required, select the check box to make Child's name a required field when running a check.
- 3. If required, from the **Citizen Share Eligibility To Provider Template** list, select the template **Thirty Hours Free Childcare - Citizen Expression of interest.** This template is used to enable a notification to be sent to Providers when a Parent choose to share their entitlement with them.
- 4. If required, select an **Eligibility** Filter to be set as the default filter.

Note: On selecting template Eligibility has ended but code is still in grace then No. of Days before/after expiration field becomes no longer visible.

- 5. If required, enter a default value for the No. of Days before/after expiration.
- 6. If required, enter the number of Days before Eligibility End Date to start rechecking.
- 7. If required, enter the number of Days after Eligibility End Date to continue rechecking.
- 8. Click the Save button.

Note: For more information, refer to the Early Years - Thirty Hour Entitlement Citizen Portal available on the <u>One Publications</u> website.

Sharing Entitlement Details with Providers

Parent(s) have been provided with the option where they can choose to share their Entitlement Details with a Provider(s) of their choice.

Parent(s) can do this by logging onto Citizen Portal then select the **Choose Providers to apply for Extended Hours Placement** link.



Note: For more information, refer to the Early Years - Thirty Hour Entitlement Citizen Portal available on the <u>One Publications</u> website.

On the **Welcome to the Thirty Hour Entitlement Portal** page additional filter options are available to allow parents to search for Providers to share their entitlement details with.

The filters and additional fields produce more information to be displayed. See the following screen shot.

						Ci	tizen F	orta
Home					📥 My Account	🕑 Sign Out	C English/C	ymraeg •
					Welcome	to the Thirty	Hour Entitlen	ient Porta
Jsing this screen will allow y hours can be selected.	ou to search for	and see which pro-	viders offer funded extend	ed hours (30 hours). All	providers will be show	vn but only those	offering funding f	or extended
You can narrow down the list ou tick to filter by postcode, nitially but can be changed.	t of providers by the postcode st This allows you	ticking to filter base hown will be your or to see providers the	ed on one or a combinatio wn postcode but you can o at are 5 miles from that po	n of, the provider name, hange this if required. A stcode. Once you have	the type of provider (distance from box wi entered in the criteria	e.g. childminders) Il also be shown ti you want to searc	and from a post his will default to th on please click	code. When 5 miles the Search
vutton.								
outton. Once you have found the pro	ovider you wish !	to share your entitle	ement details with please of	lick the Share button. Y	ou can share your det	ails with more that	in one provider.	
button. Once you have found the pro Yease be aware that by sha	ovider you wish t iring your details	to share your entitle with the provider d	ement details with please o loesn't guarantee you a pla	lick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establist	ails with more tha h if they are able to	in one provider. o accommodate	your
button. Once you have found the pro Please be aware that by sha equirements and agree the	ovider you wish t iring your details next steps.	to share your entitle with the provider d	ement details with please o loesn't guarantee you a pla	lick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establist	ails with more tha h if they are able to	in one provider. o accommodate	your
button. Once you have found the pro Please be aware that by sha equirements and agree the i	ovider you wish t ring your details next steps.	to share your entitle with the provider d	ement details with please o loesn't guarantee you a pla	tick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establist	ails with more tha h if they are able to	in one provider. o accommodate	your
button. Droce you have found the pro- Please be aware that by sha equirements and agree the r Provider Name / Service	ovider you wish t ring your details next steps. Name	to share your entitle with the provider d Service Type	ement details with please o loesn't guarantee you a pla	lick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establish	ails with more than if they are able to	in one provider. o accommodate	your Search
utton. Once you have found the pro- Nease be aware that by sha equirements and agree the r Provider Name / Service	ovider you wish t ning your details next steps.	to share your entitie with the provider d	ement details with please o loesn't guarantee you a pla	click the Share button. Y ace, the provider will ma	ou can share your det ke contact to establish	alls with more tha	in one provider. o accommodate	your Search
utton. Droc you have found the pro- Wease be aware that by sha equirements and agree the i Provider Name / Service	ovider you wish t ning your details next steps. Name	to share your entitie with the provider d Service Type	ement details with please o loesn't guarantee you a pl	click the Share button. Y ace, the provider will ma	ou can share your det ke contact to establish	alls with more than if they are able to	in one provider. o accommodate	your Search
Nutton. Once you have found the pro- Please be aware that by sha equirements and agree the i Provider Name / Service 575 Providers Found 11	ovider you wish t rring your details next steps. • Name 16 Services Found	to share your entitie with the provider d Service Type	ement details with please of the second s	lick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establish	alls with more than a if they are able to	in one provider. o accommodate	your Search
uttori. Drice you have found the prr Bease be available that is sha equirements and agree the i Provider Name / Service 575 Troviders Tourd Provider Name ^	ovider you wish i ning your details next steps. • Name • Name • Services Found Service	to share your entitle with the provider d Service Type	ement details with please of locesn't guarantee you a plu Service Type	lick the Share button. Y ace, the provider will ma	ou can share your det ke contact to establish << Pro- Distance(Miles) \$	alls with more that if they are able to nous 1 2 3 Ofsted Rating	in one provider. o accommodate 4 5 > 112 Availability	your Search ? Next >> Share
oution. Once you have found the pro- Please be aware that by sha equirements and agree the Provider Name / Service STE Provider Name / 555 Provider Name /	ovider you wish i ring your details next steps. • Name 16 Services Found Service	to share your entitle with the provider d	ement details with please do loesn't guarantee you a plu Service Type	lick the Share button. Y tace, the provider will ma From Postcode From Postcode	ou can share your def ke contact to establish	alls with more that if they are able to rous 1 2 3 Ofsted Rating	n one provider. o accommodate	your Search Next>>> Share Share

Note: the block of text shown on screen can be modified by the local authority via **One v4 Online** | **Citizen Portal Admin | Home | Administration | General Administration | Edit Resources**. For more information, see the Edit Resources section in the General Administration chapter.

The Search functionality allows the parent to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

The list of providers can be narrowed by selecting to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. If tick to filter by postcode be selected, the postcode shown will be the parents own postcode, but this can change if required. A **Distance (Miles)** from Postcode box will also be shown, this will default to 5 miles initially but can be changed. The providers that are 5 miles from that postcode will be displayed. Once the parents have found the provider they wish to share their entitlement details with then click on the Share button.

Parents can share their details with more than one provider. By sharing their details with the provider doesn't guarantee a place, the provider will make contact to establish if they are able to accommodate the requirements and agree the next steps.

NOTE: To be available for selection, a provider must have at least one service with the **Offers Extended Childcare** check box selected in the v4 Client.

The Providers that are currently chosen by the parent/carer to share entitlement details are displayed at the bottom of the screen.

Provider Name / Servic	ce Name 🗹 Si	ervice Type	From	Postcode			Search
		,,					_
Provider Name *	Service Name 0	Service Type	From Postcode	Distance(Miles) 0	Ofsted Rating	Availability	Share
1001.000		-	10.000	NA			Share
Selected Providers		Unshare Unshare Unshare					
Back							

Note: Sharing the Entitlement details can be stopped by clicking the **Unshare** button to stop sharing with this provider.

	Welcome to the Thirty Hour Entitlement Portal
Select Providers to sh	are the details of Entitlement to Extended Hours
Note: Only the Provide	ers who Offer the Extended Childcare will be available for the selection below, Providers who are not Offering Extended Childcare Services are greyed out
Select Provider	Select Provider
Selected Providers	Green Childcare Unshare
	St Marks
Back	

NOTE: If the provider name is highlighted in green, the child is already attending or is going to attend this provider and the parent or carer cannot unshare the extended entitlement details

If a provider name is highlighted in red, the provider has rejected a placement application for this child. The parent or carer can unshare the details with them.

When a Parent selects a Provider with whom they wish to share their entitlement details with an email notification is sent out to that Provider. For the providers to receive this email the local authority will need to select the template called **Thirty Hours Free Childcare - Citizen Expression of interest**, which can be found in the following location:

- 1. Logon to the Portal as an Admin user.
- 2. Select Administration | Message Templates | Template.
- 3. Scroll down and select Thirty Hours Free Childcare Citizen Expression of Interest template.
- 4. The **Contact Details** at the bottom the template must be amended accordingly.

Message Templates
Template Thirty Hours Free Childcare - Citizen Expression of interest
Thirty Hours Free Childcare - Citizen Expression of interest
Expression of interest for a 30 hours place for [\$\$ChildForename\$\$] [\$\$ChildSurname\$\$]
Message
This is an expression of interest for a thirty hours entitlement place at your nursery.
A parent has requested to share the details of their thirty hours extended code with you, including when they are entitled to take up a place.
You should discuss with the parent of [\$\$ChildForename\$\$] what their funding requirements are and whether they intend to or already share their extended funding with other settings.
The earliest date an extended place will be funded: [\$\$EligibilityStartDate\$\$] Eligibility code: [\$\$EligibilityCode\$\$]
Applicant details
Applicant name: [\$\$forename\$\$] [\$\$Surname\$\$] Relationship to child: [\$\$ApplicantHelationship\$\$] Contact details: [\$\$ApplicantOntEvenils\$]
Child details
Childs name: [\$\$ChildForename\$\$] [\$\$ChildSurname\$\$] Childs D.o.8: [\$\$ChildBot\$\$] Current address: [\$\$ChildSAddress\$\$]
Depending on the outcome of your discussion with the parent, please log into your Provider Portal account, select the 30 Hours Entitlement tile, then Previous Checks to locate the child in the ad-hoc checks section and either select to reject or accept the child at your setting.
If you have any questions regarding this message, please contact us on 01011 123456 or email contact@thisauthority.com.
Regards
Early Years and Childcare Team, LA

The Template can now be selected in the **30 Hours Free Childcare Configuration** area if required. For more information, see <u>30 Hours Configuration</u> on page *25*.

05 Running a Check

Introduction

This chapter describes the process that the service provider follows to complete a 30 hours free childcare eligibility check for a child attending the service.

The provider can either search for children who are known to attend one of their services or else perform an ad hoc check by entering the details.

Providers and services are assigned to a user via **Administration | Manage Access**. For more information, see <u>Managing User Access</u> on page *16*.

Viewing the Audit Log

The EY30H_CHECK table contains all the check records. An audit log is available by running a query on this table.

More Information:

The ERD for the EY30H_CHECK table is available from the One Publications website

Setting Up the 30 Hour Check Message

To ensure that the Eligibility dates and Grace Period End dates are displayed in the 30-hour check message:

- 1. Select Administration | Text Customisation to display the Text Customisation page.
- 2. Select Thirty Hour Entitlement Resources from the Choose a text Category drop-down.



3. Enter Label_Result_Message_Eligible in the search box and click the Search button.

Choose a text Category		Thirty Hour Entitlement Resources		*
	or Search	Label_Result_Message_Eligible	Search	
Category	Description	Кеу	Text	Culture
Text	Thirty Hour	Label_Result_Message_Eligible	This eligibility code is valid from {0} to {1}, with a grace period to {2}.	en
Resources	Entitlement Resources	Label_Result_Message_Eligible2	HMRC will manage the notification to parents of the need to reconfirm their eligibility.	en
		Label_Result_Message_Eligible_CannotChooseProvider	You can not apply for Placements with the Providers since there is no Earliest Date found to take up 30 Hours place.	en
		Label_Result_Message_Eligible_ChooseProvider	Please choose the Provider(s) you would like to check for a Childcare Place, entitlement Details will be shared with the chosen Providers.	en
		Label_Result_Message_Eligible_HasClaimTerm	The earliest start date you can take up Extended Hours funding is $\{0\}$ $\{1\}.$	en
		Label_Result_Message_Eligible_NoClaimTerm	Sorry, No term was found for this child to take up the Extended hours funding.	en
		Label_Result_Message_Eligible_ReConfirm	The parent/carer must re-confirm their eligibility code from HMRC in order to retain their extended hours eligibility between {0} and {1}.	en
		Label_Result_Message_Eligible_ReConfirm_Citizen	You must re-confirm your eligibility code with HMRC between {0} and {1} in order to retain the extended hours eligibility, failure to do this could lead to loss of funding.	en

4. Click the Label_Result_Message_Eligible link to edit the Text.

Label_Result_Message_Eligible2	HMRC will manage the notification to parents of the need to reconfirm their eligibility.

5. Update the **Text** to the following:

HMRC will manage the notification to parents of the need to reconfirm their eligibility. This eligibility code is valid from {0} to {2}.

6. Click the Save button.

Running a New Check

A provider can run a check on children that are known to attend one of their services. Alternatively, they can enter the details of a new child and perform an ad hoc check.

NOTES: When the child's forename and surname are used to perform an ad hoc check for 30 hours eligibility, if at any time in the future this child is added to the provider via the Headcount portal, the details of the ad hoc check (date of birth and eligibility code) are copied across to the Headcount portal. For more information, see the One Early Years Headcount Provider Portal handbook on the One Publications website.

The Local Authority can use the **30 Hours Free Childcare Configuration** page to configure whether surname and forename are mandatory when performing a check. For more information, see <u>30 Hours</u> <u>Configuration</u> on page 25

An eligibility code that starts on the first day of term is not eligible for that term. For a check to be eligible for the term, it must have a start date <u>earlier</u> than the first day of the term.

One uses the eligibility code, the child's date of birth and the provider name to verify eligibility.

For payment periods starting on or after the 1st January 2018, Extended Hours cannot be claimed when the funding start date for a child falls within the grace period.

To check if a child is eligible for 30 Hours funding:

1. Select **30 Hours Free Childcare | Run a New Check** on the Provider Portal home page to display the **Run a new check** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Run a New Check** button.

If you have access to more than one provider, the following screen is displayed:

eck information can be shared with the Local Au	the rou many only perform checks where thority and any other providers the child	the parent/carer has given consent fo ttends.	ir you to do so and when they have agreed that this
You are linked to more than one Provider. Pl	lease select the provider you are runn	ng the checks for from the box bel	ow.
Select Provider	*		

2. Select the required provider from the drop-down list. After the Provider is selected the search fields to enter the Childs name will appear.



- 3. To run a check for a child already associated with the provider:
 - a. Enter the child's forename, surname or characters from the name to display a list of children.

Run a new check					
The Department for Education working parents eligible for 30 check information can be share	(DfE) provides an Eligibility C Hours Free Childcare. You ma ed with the Local Authority and	hecking System (ECS) to allow you any only perform checks where the d any other providers the child atten	to check online and in real time t parent/carer has given consent fo ds.	the validity of eligibility codes is: or you to do so and when they h	sued by HMRC to nave agreed that this
In		*			
Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code *	
m ×	e.g. Smith	e.g. 3 Click to copy details in fields above	nto the check NM123456C	e.g. 50001005014	
4	14	And a second second second	NI) AB123416C	Eligibility Code 50001005014	View Details
and the second se	Date: No.	Contraction and a	NI AB123410C		View Details

- b. A tooltip will appear when the child's name is highlighted, displaying the message 'Click to copy details into the check fields above.'
- c. Click the **View Details** button to see the full details of a Child prior to selection. Click close to return to the search screen.

Child Details	
Child Details	
Mark Phil	
Date of Birth : 10/04/2016	
Address :	
Parent NI number : AB123416C	
Latest eligibility Code : 50001005014	
30 hours eligibility start date : 1/9/2019 ('Autumn Term')	
Last check run date : 20/5/2020	
Eligibility from : 1/1/2018	
Eligibility To: 31/12/2020	Ν
Grace period end : 31/12/2020	5
Check Status : Eligible	
Close	
Close	

d. Click on the required child in the list to copy the details into the check fields.

Run a new check	(
The Department for Educatio working parents eligible for 3 check information can be sha	n (DfE) provides an Eligibility Ch 0 Hours Free Childcare. You ma ared with the Local Authority and	necking System (ECS) to allow you any only perform checks where the any other providers the child atten	to check online and in real time parent/carer has given consent for ds.	the validity of eligibility codes iss or you to do so and when they ha	ued by HMRC to ave agreed that this
Child's Forename	Child's Surname -	▼ Child's Date of Birth *	Parent's NI Number -	Eligibility Code -	
- March	Pag.	10/04/2016	e.g. NM123456C This field is required.	50001005014	Clear
					Run Check

All populated fields are inaccessible and cannot be edited. By selecting the **Clear** button will remove the entries in each field to restart the search.

e. Fill in the remaining details.

f. After all details have been entered in the correct format the **Run Check** button is enabled and can be selected to run a check.

Department for Education ing parents eligible for 30 k information can be share	(DfE) provides an Eligibility CH Hours Free Childcare. You ma ed with the Local Authority and	necking System (ECS) to allow you iny only perform checks where the any other providers the child atten-	to check online and in real time t parent/carer has given consent fo ds.	the validity of eligibility codes issued by HMRC to or you to do so and when they have agreed that t
an Tradition		¥		
hild's Forename *	Child's Surname *	Child's Date of Birth * 10/04/2016	Parent's NI Number * AB123416C	Eligibility Code * 50001005014
Success ! The earliest s This eligibilit The parent/c:	tart date you can take up Ext y code is valid from 01-Jan-20 arer must re-confirm their elig anage the notification to parei	ended Hours funding is 01–Jan-202 920 to 31-Dec-2021, with a grace pe ibility code from HMRC in order to nts of the need to reconfirm their e	0 Spring Term. riod to 31-Dec-2022. retain their extended hours elig ligibility.	ibility between 03-Dec-2021 and 31-Dec-2021.

- If the check is **Success!**, then click the **Run a new check** button. All previous entries will be cleared to start a new search.
- If a check returns '**Sorry, Not Eligible**!' for a Child that is known to be eligible, check ECS Settings. This could be set to '**Child Not Found**'.

Run a new check					
The Department for Education (D working parents eligible for 30 He check information can be shared	OfE) provides an Eligibility Chours Free Childcare. You man with the Local Authority and	ecking System (ECS) to allow you any only perform checks where the p any other providers the child attend	to check online and in real time t parent/carer has given consent fo ds.	he validity of eligibility codes issued by HMR0 r you to do so and when they have agreed th	C to nat this
100 TO 100		•			
Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code * 50001005014	
A Sorry, Not El The checking se	igible <u>!</u> rvice has responded that thi	s code is not eligible, please confi	rm that all the details you have (entered are correct.	
Run a new check					

Amend the ECS settings if required and click **Run a new check** button to re-start the search.

• If the check returns '**Oh dear, something went wrong!**' for a Child that is known to be eligible, then check ECS Settings. This could be set to '**error**'.

Run a new check					
e Department for Education (orking parents eligible for 30 H leck information can be share	DfE) provides an Eligibility Ch- lours Free Childcare. You man d with the Local Authority and	ecking System (ECS) to allow you to ny only perform checks where the p any other providers the child attend	to check online and in real time t parent/carer has given consent fo ds.	the validity of eligibility codes issued l or you to do so and when they have a	oy HMRC to agreed that this
		¥			
Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code *	
Read and a second s		05/05/2016	nm123456C	50001005014	
Oh dear, som This checking se Success	nething went wrong ! Prvice has responded with an	error message. Please attempt to o	correct the problem and re-try.		
Re-run the check	Run a new	check			

An option is available to **Re-run the check** or **Run a new check**.

To Re-run the check, the ECS settings can be changed in v4 Client without leaving this screen as follow:

- 1. Launch v4 Client and go to: Focus | Early Years | Early Years Setup | EY Pupil Premium ECS Configuration.
- 2. Scroll down to ECS Eligibility Status and change it to Eligible.
- 3. Click on Save.
- 4. Return to the Run Check screen and click Re-run the check button.

Note: If the check still returns an error then try clearing the cache by selecting **Administration** | **Cache**, then re-run the check.

To run an ad hoc check:

- 1. Select a Provider from the drop down list.
- 2. Enter the child's forename, surname or characters from the name.

No Records Found is displayed on screen.

3. Click the **Child not found** button.

Run a new check					
The Department for Education (D working parents eligible for 30 He check information can be shared	bfE) provides an Eligibility Chec burs Free Childcare. You many with the Local Authority and an	king System (ECS) to allow you t only perform checks where the p ny other providers the child attend	to check online and in real time t varent/carer has given consent fo ls.	he validity of eligibility codes issued by or you to do so and when they have agr	HMRC to eed that this
		¥			
Child's Forename •	Child's Surname *	Child's Date of Birth *	Parent's NI Number •	Eligibility Code *	
Ann	Bell	e.g. 30/11/2012	e.g. NM123456C	e.g. 50001005014	
		No Records Fe	ound		
Child not found					

A popup box appears to confirm you want to add a new Child.

e Department for Education rking parents eligible for 3 ack information can be sha	n (DfE) provide 0 Hours Free C ared with the Lc	vu want to add a new child ?	ок	f eligibility codes issi so and when they ha
Child's Forename *	Child's Surname*	Child's Date of Birth • e.g. 30/11/2012	Parent's NI Number -	Eligibility Code - e.g. 50001005014
		No Records F	Found	

- 4. Click OK.
- 5. Fill in all fields using the correct format.
- 6. Click the Run Check button.

If the check was successful, click **Run a new check** button. The screen will return to allow another child's name to be enter against the same Provider selected if required.

Changing a Provider

An alert message is displayed if a different Provider is selected, after the details of a Child is entered in the search fields. The message is as shown in graphic below.

Alert	
0	If you continue, child details will be cleared
	Continue Cancel

- Select Continue will clear all fields. The details for the child can now be entered against the selected Provider.
- Select **Cancel** will return to previous screen where you can resume with the check.

For children who are already known to One, the details of the check are displayed on the **Student Details** page in the v4 Client.

Reviewing Previous Checks

To review the results of previous checks for 30 Hours funding:

1. On the **Provider Portal** home page select **30 Hours Free Childcare | Review Previous Checks** to display the **Checks Run for Ages 2 to 5 Years 6 Months**.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Review Previous Checks** button.

_	view checks that yo	u nave done.							
Ŧ		Provider	Please select				*		
Existing C	nild Checks								
Child's Forename ≑	Child's Surname ≑	Child's Date of Birth ≑	Parent's NI Number \$	Eligibility Code 🕈	Check Last Run ≑	Eligible From \$	Eligible To \$	Grace Period End \$	Check Status ≎
d-hoc Ch	ecks								
Child's	Child's	Child's Date of	Parent's NI	Eligibility	Check Last	Eligible	Eligible To	Grace Period	Check
Forename 🖨	Surname 🖨	Birth ≎	Number \$	Code 🖨	Run \$	From \$	\$	End \$	Status 🖨

2. Select a **Provider** from the drop-down to display checks that have been run for that provider. The list displays the providers to which you have access.

Ŧ			Provider	Green Ch	ildcare			*	
Existin	g Child Ch	ecks							
Child \$	Eligibility Code ≎	Check Last Run ≎	Eligible From ≎	Eligible To \$	Grace Period End ≎	Check Status ≎	Earliest Date to take up 30 Hrs place ≑	From Citizen Portal \$	Further Action Needed
Simon (30/03 /2014)	78945612378	01/02/2018	01/09/2017	31/01/2018	31/03/2018	Eligible	No term available.		
\d-hoc	Checks								
Child \$	Eligibility Code ≎	Check Last Run ≎	Eligible From \$	Eligible To ¢	Grace Period End ≎	Check Status ≎	Earliest Date to take up 30 Hrs place ≎	From Citizen F Portal \$	Further Action Needed Show All
James (03/03 /2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	~	Accept Placement Reject Placement Contact Details
David (21/12 /2014)	50098765467	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Jan/2018 Spring	~	Accept Placement Reject Placement Contact Details
Deborah (12/08 /2014)	50098987654	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	~	Accept Placement Reject Placement Contact Details
Saman tha (30/03	14725836914	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn		

3. If required, enter search criteria to display a list of matching checks as shown in the following graphic.

Jse this so	creen to view chec imes	ks that you have	Cheo done. Provider	cks Run 1	for Ages 2	to 5 Yea	rs 6 Months	Ŧ	
Existir	ng Child Cl	necks							
Child ¢	Eligibility Code \$	Check Last Run ≑	Eligible From \$	Eligible To \$	Grace Period End ≎	From Citizen Portal \$	Further Action Needed		
d-ho	c Checks								
Child \$	Eligibility Code ≎	Check Last Run ≎	Eligible From \$	Eligible To \$	Grace Period End ≑	Check Status \$	Earliest Date to take up 30 Hrs place \$	From Citizen Portal \$	Further Action Needed Show All
James (03/03	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	~	Accept Placement, Reject Placement Contact Details

The Existing Child Checks panel displays checks for children who are known to One.

The Ad-hoc Checks panel displays checks for children not already known to One.

The most recent checks are at the top of each grid.

4. If required, click a column heading to sort the grid based on that field.

NOTE: The **From Citizen Portal** check box is selected (ticked) if the record is directly from the parent. The provider can accept or reject the placement requests and display contact details. For these records, the **Accept Placement**, **Reject Placement** and **Contact Details** links are enabled.

Accepting or Rejecting a Placement

Placement requests are submitted by parents and carers using Thirty Hour Entitlement in the Citizen portal. Such records are displayed on the **Review Previous Checks** page with the **From Citizen Portal** check box selected (ticked). Providers can review placement requests and accept or reject them. If they need to contact the parent, they can display contact details. If the provider has more than one service, they need to select the required service.

- 1. On the Thirty Hour Entitlement Portal home page, click the Review Previous Checks button.
- 2. Select the required **Provider** from the drop-down to display checks that have been run for that provider. The list displays the providers to which you have access.

▼			Provider	Green Ch	ildcare			•	
Existing	g Child Ch	ecks							
Child 🗢	Eligibility Code \$	Check Last Run ≎	Eligible From ≎	Eligible To \$	Grace Period End ≎	Check Status ‡	Earliest Date to take up 30 Hrs place \$	From Citizen Portal \$	Further Action Needed
imon 30/03 /2014)	78945612378	01/02/2018	01/09/2017	31/01/2018	31/03/2018	Eligible	No term available.		
d-hoc	Checks								
Child \$	Eligibility Code \$	Check Last Run ≎	Eligible From \$	Eligible To \$	Grace Period End ≎	Check Status ≑	Earliest Date to take up 30 Hrs place \$	From Citizen Portal \$	Further Action Needed
lames 03/03 (2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	*	Accept Placement Reject Placement Contact Details
David 21/12 /2014)	50098765467	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Jan/2018 Spring	~	Accept Placement Reject Placement Contact Details
eborah 12/08	50098987654	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	~	Accept Placement Reject Placement Contact Details
(2014)				40,000,00040	24/02/2049	Eligible	01/500/2017		

- 3. If required, to view contact details for the parent, click the **Contact Details** link.
- 4. To accept a placement request:
 - a. Click the Accept Placement link to display the following dialog window:

Placement for James	х
Please provide the dates from which the child will attend. Once accepted the child's details will be submitted to the local authority who will add them to the system.	
Placement Start Date (dd/mm/yyyy):	
Cancel	ve

- b. Select a Placement Start Date.
- c. If required, select a service.
- d. Click the Save button.

NOTE: When a placement has been accepted, it is processed using the Portal Back Office and is then added to the provider's headcount. The provider's base must be defined as a B2B Student Base in the v4 Client via **Focus** | **Bases**.

Alternatively, to reject a placement, click the **Reject Placement** link. The child's record is removed from the grid.

06 Using the Expiration Dashboard

Introduction to the Expiration Dashboard

The **Expiration Dashboard** is used to alert providers about children who are nearing their eligibility end date and whose parents have not reapplied. The provider can then remind parents to recheck their eligibility.

Colour coding is used to display the number of children whose **Eligibility End Date** has already expired or will expire within the next 28 days. The number of children falling within each category is displayed on the **Expiration Dashboard** button on the 30 Hour Entitlement Portal home page as shown in the following graphic:



The number displayed in red indicates those whose eligibility has already expired. The number displayed in amber is the number due to expire within the next 28 days.

These numbers are also displayed on the **30 Hours Free Childcare** tile on the Provider Portal home page. The number in the black circle is the count of parents who have selected to share their entitlement details, as shown in the following graphic:



The dashboard also displays the earliest date that a child can take up a 30 Hours place.

Entitlement E Jse this screen to trac	Expiration E	Dashboard s due to expire.							
rovider	ded Yes Green Childcare Ny keyword	Days 180	Eligibility Fil	Grace Per	iod Ending in the next 1	80 days 💌			Searci
♥ Child	Eligibility Code \$	Eligible From ≑	Eligible To \$	Grace Period End ≎	Eligibility was last checked on \$	Earliest Date to take up 30 Hrs place \$	Note Need	s / Furt led \$	her Action
Simon (30/03 /2014)	78945612378	01/09/2017	31/01/2018	31/03/2018	01/02/2018 Eligible Recheck now	No term available.	C	*	Update
5aman tha (30/03/2013)	14725836914	01/09/2017	10/02/2018	31/03/2018	02/02/2018 Eligible Recheck now	01/09/2017 Autumn	D	*	Update
David (21/12 /2014)	50098765467	01/09/2017	10/02/2018	31/03/2018	13/02/2018 Eligible Recheck now	No term available.	Ľ	*	Update

Displaying Children whose Eligibility is due to Expire

The **Expiration Dashboard** initially displays a list of children whose grace period ends in the next 180 days and further action is required.

Providers can filter the list of children displayed based on their **Eligibility End Date** or **Grace Period**.

NOTE: The filters set on this page do not affect the numbers displayed on the **Expiration Dashboard** button or the **30 Hours Free Childcare** tile.

1. On the Provider Portal home page, select **30 Hours Free Childcare | Expiration Dashboard** to display the **Entitlement Expiration Dashboard** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Expiration Dashboard** button.

Entitlem Use this scree	nent Expiration Dash	ooard expire.					
Further Action	on Needed Yes > Days Anu Providers	180 Eligibili	ity Filter Grac	e Period Ending	g in the next 180 d	ays 🗸	Search
♥ Child \$	Earliest Date to take up 30 Hrs place ¢	Eligibility Code \$	Eligible From ‡	Eligible To \$	Grace Period End \$	Eligibility was last checked on \$	Notes / Further Action Needed \$
No records	s found.						

- 2. If required, the filters can be updated as follows:
 - a. Select an option from the **Further Action Needed** drop-down to display children needing further action, children not requiring further action or any children.
 - b. Enter the number of Days to be used in the Eligibility Filter.
 - c. Select an Eligibility Filter from the drop-down list.
 - d. Click the **Search** button to display a list of children matching the specified filters.
- An Eligibility Filter called Eligibility has ended but code is still in grace is available for selection which will produce a list of children that are still in their Grace period despite their eligibility has ended. An example of this can be seen in the graphic below.

Note: A configuration option is available to allow local authorities to set a default value for The Eligibility Filter and number of Days. For more information see <u>30 Hours Configuration</u> page25

Entitlement Exp Use this screen to track el	Entitlement Expiration Dashboard Ise this screen to track eligibility which is due to expire.										
Further Action Needed Any v Days 180 Eligibility Filter Eligibility Ending in the next 180 days Grace Period Ending in the next 180 days Grace Period Expired in the last 180 days Grace Period Expired in the last 180 days Eligibility has ended but code is still in grace See Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword Filter using any keyword 									Search		
▼ Child Earliest Date to take up 30 Hrs place ♀ Eligibility Code ♀ Eligible From ♀ Eligible To ♀ Grace Period End ♀ Eligibility was last End ♀ Notes / Further Needed ♀									ther Action		
Simon Baily (12/10/2014)	01/09/2018 Autumn Term	75315985245	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	C	*	Update		
Sam Boon (12/10/2014)	01/09/2018 Autumn Term	95115995115	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	C	*	Update		

The column order has changed to show the **Earliest Date to take up 30 Hrs place** before eligibility start date.

The Eligible To date is displayed using the following colours:

Red - eligibility has ended.

Amber - eligibility ends in the next 28 days.

Green - eligibility ends in more than 28 days.

4. If required, click the **Update** link to display the **Notes / Further Action Needed** dialog. This enables providers to set a flag against a check record if further action is not required, so that they no longer receive alerts about the record.



- a. If required, deselect the Is further action needed? check box.
- b. If required, enter notes.
- c. Click the Save button.
- 5. If required, to perform an eligibility check:
 - a. Click the Recheck now link to display the following dialog.



b. Click the **OK** button.

NOTE: The check displayed on the dashboard is the most recent <u>eligible</u> check for each child and the **Is** *further action needed* indicator only applies to that check record.

When a recheck is performed, if an ineligible check is returned, this does not affect the **Is further action needed** indicator. If there is a new eligible check (manual or recheck), the new check record supersedes the old one.

Once the recheck period has finished, the indicator will not change unless there is a manual eligible check.

07 Updating Student Details in One v4

Introduction

When a 30 Hour entitlement check is performed in the Provider portal for a child who exists in the One v4 Client, the details are used to update the student details record. The **Student Details | Early Years Additional Information** panel is updated with the **Eligibility Code** and the following information about the check:

- Checked on Date
- Checked by User
- Child Date of Birth Checked
- National Insurance Number Checked
- Eligible From and To dates
- Grace Period End date
- Check Status
- Checked for Providers.

Tudent Details [Ba		or birth: 05/06/2013)]									×
💾 Save 📄 New 🚫 I	Memo 🔲 Data F	anels 🦞 Alerts 🚰 Sq	l Mail Merge 🙆 UDF N	lanager 🐁 Data	Conflicts 🙀	ContactPoint F	letrieve 💥 Dek	ete			
💿 📀 01. Student Ider	ntifiers 01a. Nat	ional Hea 02. School	History 03. Address D	etails 04. Addres	see 05. Cont	act Details 06	. Student Profile	07. Sup	porting Details 08. LA Details 09. Court Orders 10. Language/Mean 11. Ethnicity, Re 33. Early Years Addi -	-	1
33. Early Years Additio	onal Information										1 -
Eligible for 2 year old	×	Ef	ffective Date		¥						
Basis For Funding	_										
				0							
Deferred	×										
Pupil Premium Checks	^										1
Check Date	Initiated	Check Fundin	a Basis Check	Check	Check	Process	Status			👂 Run Check	
	By	Result	9 outro Metho	d DOB	Surnam					🐳 Add	
										💥 Remove	
Carer Consent											1
Carer Relati	Paren	tal Consent	Given								
Name	Resp	onsibility	0.10.1								
											1
30 Hour Entitlement Cr	hecks										
Eligibility Code 31446	6477353										-
Checked on Date	Checked by Use	Child Date of Birth Checked	National Insurance Number Checked	Eligible From	Eligible To	Grace Period End	Check Status	Recheck	Checked for Providers		
18/05/2017 13:41:31	UNKIY	05/06/2013	AH361274B	01/09/2017	31/03/2018	30/04/2018	Eligible		Test mini gal		
16/05/2017 05:46:19	System	05/06/2013	AH361274B	01/01/2018	30/09/2018	31/10/2018	Eligible	0	ARCDEL Provider1, ARCDEL Provider2, Anu Providers, Bumble Bee Nursery, Deborah Green Childcare, <only 5="" first="" listed="" providers=""></only>		
15/05/2017 10:56:38	System	05/06/2013	AB123646B	01/09/2017	30/12/2017	31/12/2017	Eligible	0	ARCDEL Provider1, ARCDEL Provider2, Anu Providers, Bumble Bee Nursery, Deborah Green Childcare, <only 5="" first="" listed="" providers=""></only>		
											_

NOTE: The eligibility code is unique to a student. All checks performed for this child with this eligibility code are listed on the **30 Hour Entitlement Checks** sub-panel.

Merging Children Records in One v4

You can merge duplicate child records if <u>only</u> one record has the full extended entitlement information or any of the following extended entitlement information:

- Child's eligibility status
- Child's eligibility code
- Child's check status
- Start, End and Grace Period dates of the child's eligibility
- Child's recorded attendance hours.

NOTE: If child records have been matched and both records have the full or partial extended entitlement information and it is conflicting in these areas, the child records are not merged. An alert is displayed to prompt the user to select the required record.

If it is necessary to merge duplicate child records, the 30 hours eligibility information is retained as follows:

- If neither child has an eligibility code, then the child record being kept does not have a code.
- If only one child has an eligibility code, then the child record being kept will have that code added or retained.
- If both children have an eligibility code, then the child record being kept will keep their original code.

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