



Early Years Headcount Provider Portal Handbook

last updated for the Summer 2018 release

Handbook

CAPITA

Revision History

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Early Years Headcount Provider Portal Handbook/Summer 2018/2018-07-27

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01 / Introduction to Early Years Headcount

Overview

Early Years Headcount uses the One Provider Self Service portal. It enables the Local Authority to create requests (tasks) for information relating to children receiving funded nursery provision. Early Years providers can respond to those requests by submitting online forms. After the providers submit their headcount data, the information is incorporated into the Local Authority's One database.

Early Years Pupil Premium

In v4 Client, the Early Years module enables Local Authorities to check eligibility for EYPP for children in the correct age range through the government's Eligibility Checking Service (ECS).

More Information:

For information regarding making payments and running ECS checks via Early Years v4 Client, refer to the *Managing Early Years Payments* handbook available on the One Publications website (www.onepublications.com).

The Provider Portal Headcount module enables the Local Authority to collect the required information for making an eligibility check on economic grounds (surname, date of birth, NI or NASS number of a child's parents or carers) as part of a headcount collection task. Settings can be informed as to which children are eligible for the Early Years Pupil Premium via the Provider Portal messaging system. As such, settings can plan expenditure to raise achievement in those children who are identified as being most in need.

For more information, see [Executing a Task](#) on page 14.

What's New in this Release?

For the One Summer 2018 release (3.66), changes have been made to the Eligibility Checking Service (ECS) settings.

More Information:

For more information, see [Configuring the Link to the ECS](#) on page 57.

Using this Handbook

This handbook is intended for Early Years Headcount Administrators at the Local Authority. It describes the administration processes performed by the Local Authority and also provides an overview of the processes performed by the Early Years provider.

Early Years Headcount uses the Portal Back Office to match incoming student information with those who already exist in the One database.

More Information:

For information regarding using the Portal Back Office, refer to the *One Portal Back Office* handbook. For information regarding configuring the portal, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*. For information regarding setting up Early Years Headcount, refer to the Technical Guide: *Setting Up One Headcount for Local Authorities*. All documents are available on the One Publications website (www.onepublications.com).

Administration

The **Administration** menu route enables the Local Authority Provider Portal Administrator to perform the following processes:

- Manage user access to headcount information.
- Manage the setup and configuration of the website.

The **Headcount | Administrator** menu route enables the Local Authority Headcount Administrator to:

- Compose and send messages to Early Years providers.
- Create and manage requests for headcount submissions.
- Manage imports of headcount submissions from providers.
- Create and manage reports.
- Create and manage service groups.
- Configure the headcount portal.

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: <https://support.google.com/chrome/answer/95416?hl=en-GB>

Common Functionality

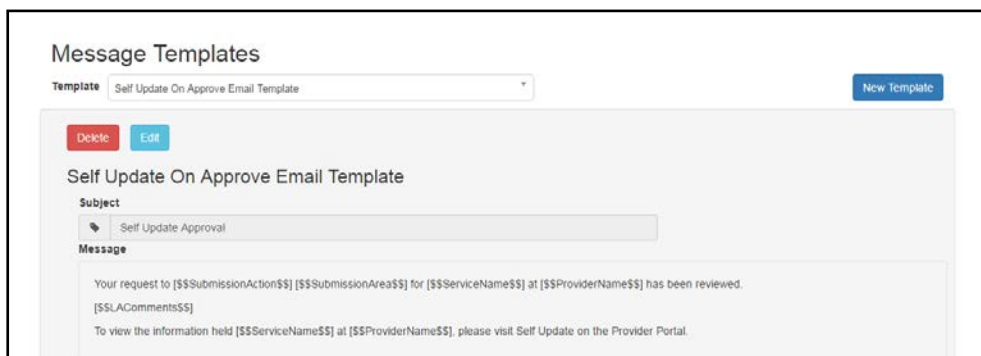
The following functionality is common for all processes in the Provider portal.

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.

Function	Description
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.

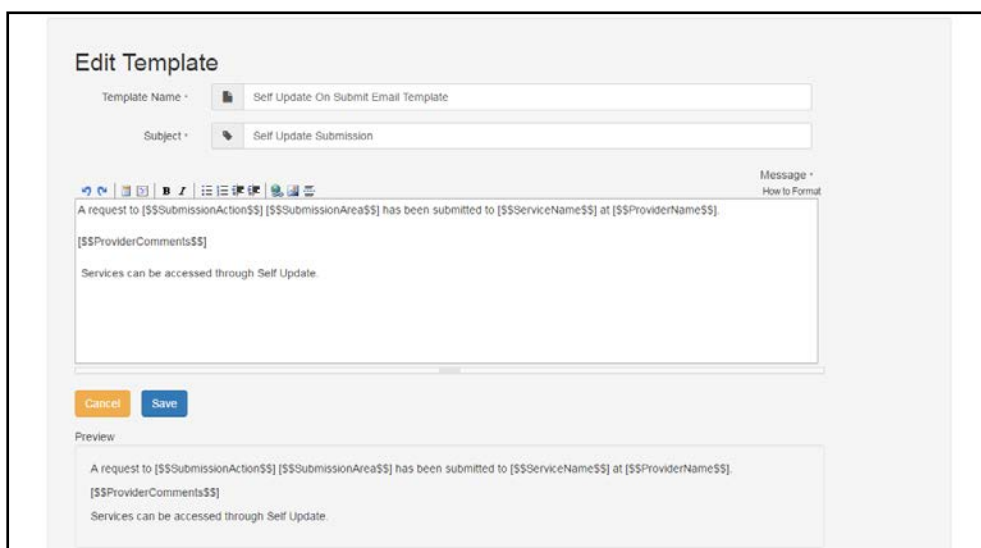
Message Templates

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



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.



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.

02 / Managing Users

Introduction

NOTE: Users are created and user permissions are set up in the v4 Client. For more information refer to the Deploying and Configuring the One Provider Self Service Portal for Local Authorities technical guide available on the One Publications website (www.onepublications.com)

In the Early Years Headcount application there are two types of users, Headcount users and Headcount Administrators. Headcount Administrators can create tasks, send messages, and manage users. Headcount users can complete tasks assigned to them and read messages sent to them by an administrator.

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. Headcount users should be members of the Provider Portal Headcount User group. Provider Administrators must be in the security group Provider Portal Headcount Administrators.

Finally, after a headcount 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. For more information, see [Managing User Access](#) on page 7.

Creating a Portal User Account

To create a new portal user account, the One System 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 Accounts**.
2. Send the log in details (user name and initial password) to the new user via email.

NOTE: To use the Headcount portal users must be in the security group **Provider Portal Headcount User**. To have administrator access a user needs to be in the security group **Provider Portal Headcount Admin**.

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 must 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.

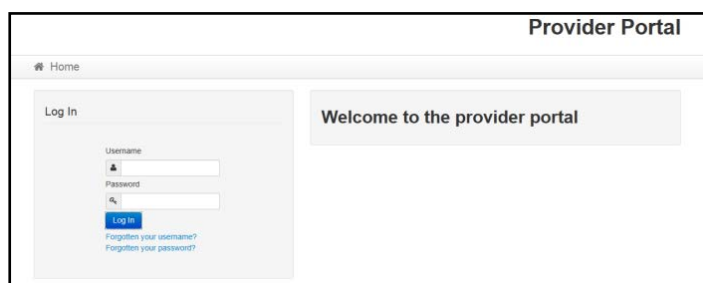
They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

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 [My Account](#) and on the One Publications website.

Logging into the Portal

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



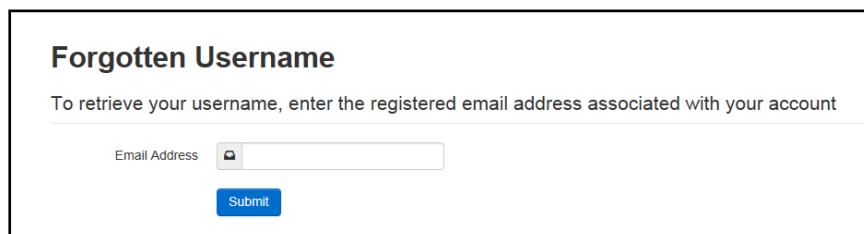
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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.

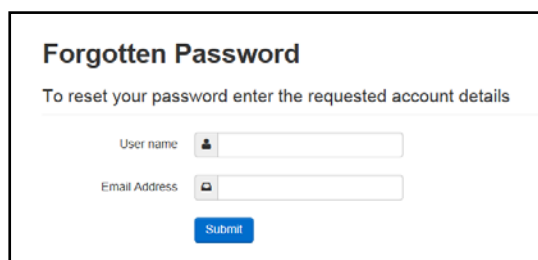


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

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.



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.

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.

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 (www.onepublications.com).

Managing User Access

Granting Access to Providers and Services

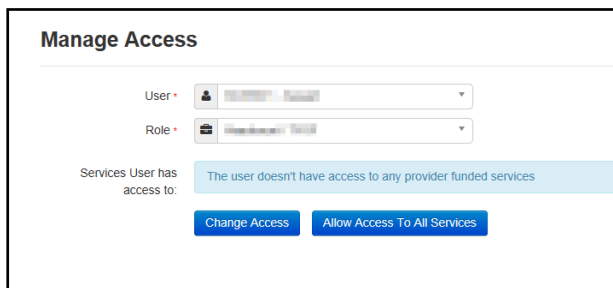
After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

To update access for the selected user:

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

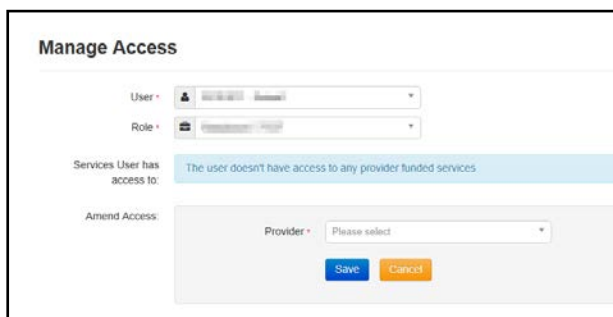
Managing Users

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



The screenshot shows the 'Manage Access' interface. At the top, there are two dropdown menus: 'User' and 'Role'. Below these, a message states: 'Services User has access to: The user doesn't have access to any provider funded services'. At the bottom of this section, there are two buttons: 'Change Access' and 'Allow Access To All Services'.

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



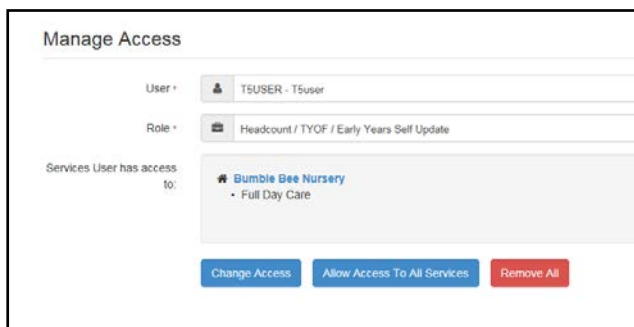
This screenshot shows the 'Manage Access' page with the 'Amend Access' panel expanded. The 'User' and 'Role' dropdowns are still visible. The 'Amend Access' section contains a 'Provider' dropdown menu with the text 'Please select' and two buttons: 'Save' and 'Cancel'.

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.



The screenshot shows the 'Manage Access' page for a user named 'TSUSER - TUser'. The 'Role' is 'Headcount / TYOF / Early Years Self Update'. Under 'Services User has access to:', there is a list item for 'Bumble Bee Nursery - Full Day Care'. At the bottom, there are three buttons: 'Change Access', 'Allow Access To All Services', and 'Remove All'.

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

Reviewing Users

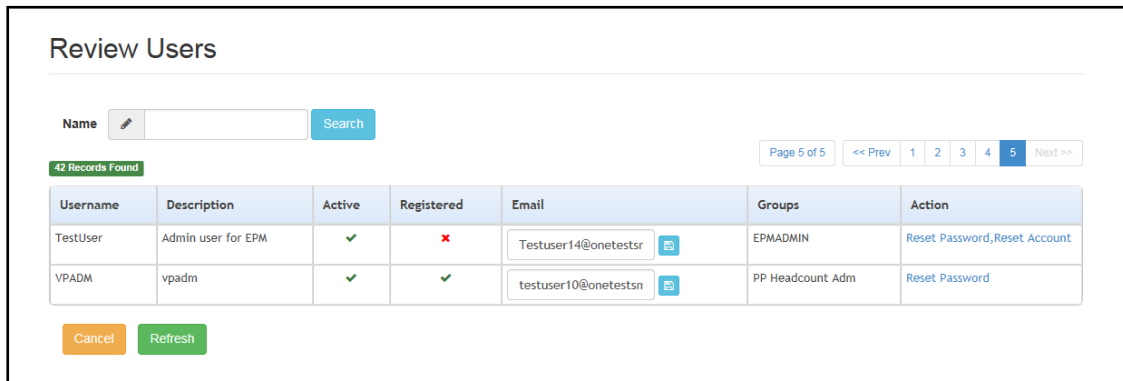
Introduction

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.



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

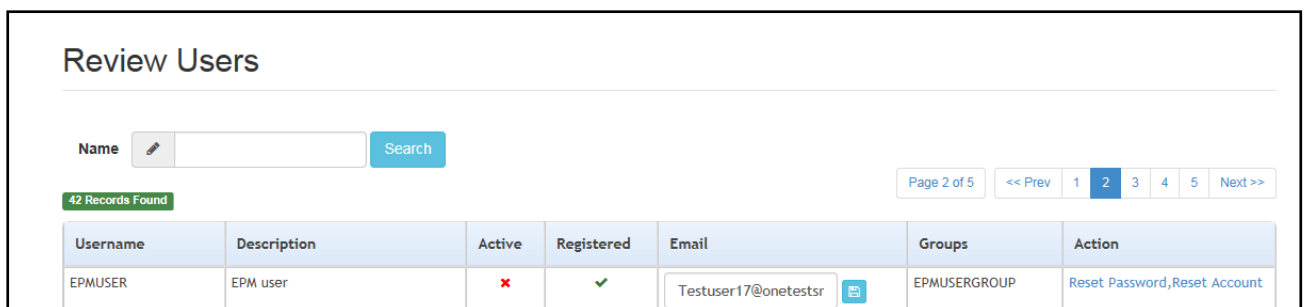
If a user has forgotten their password, to enable them to reset their password:

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:



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 [Resetting a User Password](#) on page 9

Setting Up Two Step Verification

Introduction

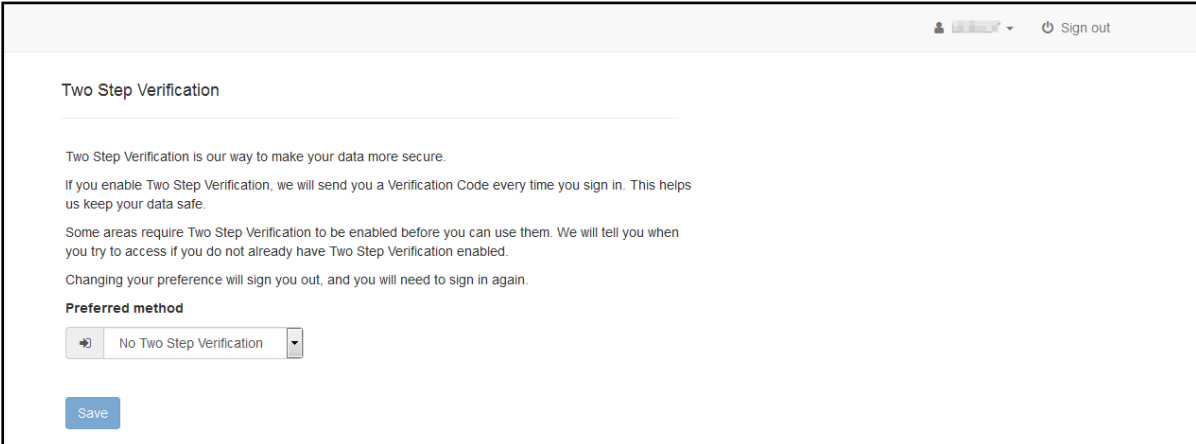
If two step verification is enabled, you will be sent a verification code every time you sign in.

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.



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

No Two Step Verification

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.

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.

Assigning Permissions

Permission to Access Headcount

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

Permission can be given to one or more of the following business processes under the **Provider Portal** main business process.

- Headcount Site Administrator
- Headcount Task Viewer
- Headcount User.

Managing Users

Permissions Editor [PP Headcount Adm-Provider Portal Headcount Admin]

Save

01. Main Processes

Main Business Processes: Provider Portal

02. Business Processes

Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal				
Better Start Administrator				
Better Start User				
Early Years Pupil Premium				
EPM Administrator				
EPM Base				
EPM Plan				
EPM Reporter				
EPM Services				
EPM User				
General Site Administrator				
Headcount Site Administrator				
Headcount Task Viewer				
Headcount User				
SchoolAdmissions - Ranking				
SchoolAdmissions - Update In Year Offer Statuses				
SchoolAdmissions - Verification Siblings				
SchoolAdmissions - View Applications & Allocations				
Self Update				
Self Update Administration				
Self Update Early Years				
Thirty Hour Entitlement User				
TM Site Administrator				
Training				
TYOF Childrens Centre User				
TYOF Funding Manager				
TYOF Provider User				
TYOF Site Administrator				

03 / Home page

Provider Portal Home Page

Introduction

When the portal administrator or user logs into the Provider portal, any announcements regarding the portal are displayed. The user clicks the **Continue** button to display the **Home** page.

NOTE: Announcements are configured via **Administration | Site Setup | Text Customisation**.

The **Home** page displays the **Site Logo** and guidance text set up via **Administration | Site Setup**.

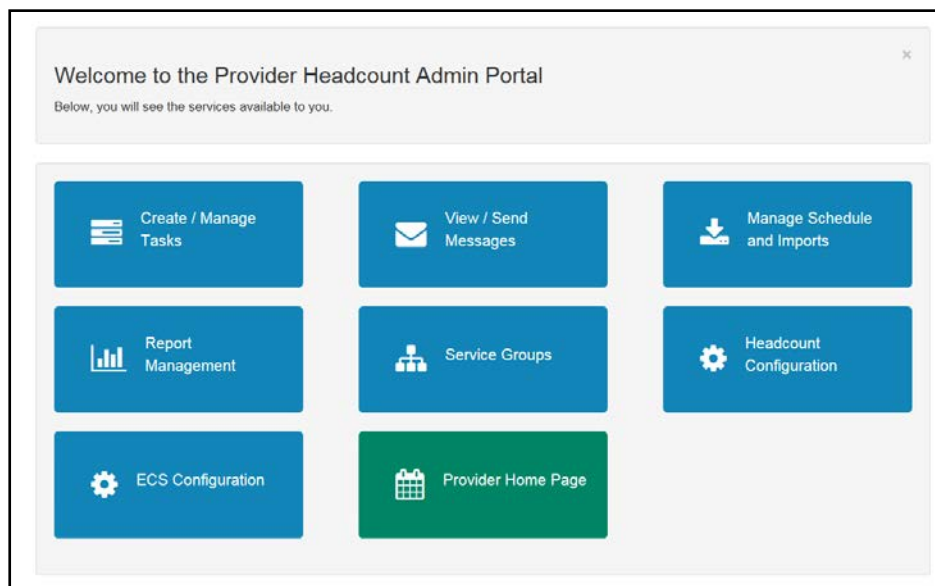
NOTE: The facility to change your password or secret question is accessed by clicking the drop-down adjacent to your user name.

Navigating within the Provider Portal

The services to which you have access are indicated by the buttons displayed on the **Provider Portal** home page. There are drop-down menus displayed at the top of each page which enable you to navigate to other pages.

Managing Provider Headcount Administration

The Provider Headcount Admin Portal home page is displayed when you click the **Headcount** button on the Provider Portal home page.



The following options are accessed via the **Headcount | Administrator** menu route or by clicking the required button:

- Tasks
- Messages
- Manage Imports

- Reports
- Service Groups
- Headcount Configuration
- ECS Configuration.

Viewing and Executing Headcount Tasks

Viewing Tasks

Tasks are managed by clicking the **Create / Manage Tasks** button or selecting **Tasks** from the **Headcount | Administrator** menu.

Name	Created	Deadline	Issued By	Service Status	Actions
Headcount (Amendment) for Spring Term 2016 for 3 year olds is required	04/01/2017 09:21:03	31/01/2017	BASEMAP	1 0 0	Retract
Headcount (Forecast) for Summer Term 2016 for 2 year olds, 3 year olds, 4 year olds is required	03/01/2017 11:09:17	31/01/2017	BASEMAP	0 1 0	Retract
Headcount (Actual) for Spring Term 2016 for 3 year olds is required	03/01/2017 09:00:27	31/01/2017	BASEMAP	0 1 0	Retract
Headcount (Actual) for Autumn Term 2016 for 2 year olds, 3 year olds, 4 year olds is required	02/12/2016 08:16:50	27/12/2016	VPADM	1 0 0	
Headcount (Forecast) for Summer Term 2016 for 2 year olds, 3 year olds, 4 year olds is required	30/11/2016 07:15:23	10/12/2016	PRASANNA	0 1 0	
Headcount (Forecast) for Spring Term 2014 for 2 year olds, 3 year olds, 4 year olds is required	20/01/2015 05:23:25	22/01/2015	HEADCOUNTADMIN4	1 0 0	

The **Tasks** page lists the headcount tasks that have been issued to those providers and services to which you have access. The **Service** browse enables you to filter the list to only display tasks for a specific service.

NOTE: The browse displays active services only.

More Information:

- [Creating a New Task](#) on page 31.
- [Managing User Access](#) on page 7.

Click on a task to display the details.

Task Details

Headcount (Forecast) for Autumn Term 2015 for 3 year olds is required

1 Service(s)

Provider	Service	Funded	Service Type	Status
...	...		Breakfast Clubs	Not started

Buttons: Back, New Message

Executing a Task

When the service provider logs onto the Provider Self Service portal, tasks assigned to services to which they have access are displayed in the **My Tasks** area of the provider's home page.

NOTE: Only current tasks are displayed. To display previous tasks, click the **View all tasks** link.

My tasks

6

- Headcount (Actual) for Spring 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**

St Marks - Full Day Care

Edited but not yet submitted, Due 11 days
- Headcount (Actual) for Summer 2017 2017 for 2 year olds, 3 year olds, 4 year olds is required**

EY_BASE[9621] - EY_SERVICE[1343]

Unsubmitted, Due 11 days
- Headcount (Amendment) for Summer 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**

testk provider - testk ser

Unsubmitted, Due 11 days
- Headcount (Amendment) for Summer 17 2017 for 4 year olds is required**

testk provider - testk ser

Unsubmitted, Due 11 days
- Headcount (Forecast) for Autumn 17 2017 for 4 year olds is required**

testk provider - testk ser

Unsubmitted, Due 11 days
- Headcount (Forecast) for Summer 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**

testk provider - testk ser

Edited but not yet submitted, Due 11 days

[View all tasks](#)

The following process is used by the provider to compile and submit the required information.

1. Click on a task to display the headcount details and submission grid. A row is displayed for each child at the service for whom a claim is being made. The columns displayed are those selected on the **Headcount Configuration** page. If **Combine Universal and Extended Pay Hours Columns** is set to **On**, universal and extended columns are combined and displayed as shown in the following graphic:

Headcount (Actual) for 2, 3 & 4 year olds Status: Unsubmitted Deadline: 31 May 2017

Anu Providers / Anu service / Aut 18 2018 (01 Sep 18 - 31 Dec 18)

You can edit and re-submit this information at any time until the deadline of 31 May 2017

Add Child
Edit Headcount
Download

Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	
	Test	Child School		24/05/2014	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	
1	Test 1		EH	23/05/2014	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	
2	Test 2		EH	03/05/2015	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	
5	Test 5		EH	24/05/2014	4	01/04/2018		0.00	0.00	0.00	0.00	0.00	
	Full Elg	Test Child	EH	24/10/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	

If it is set to **Off**, providers can enter universal and extended hours separately as shown in the following graphic. For more information, see [Updating Submission Grid Columns](#) on page 55.

Headcount (Actual) for 2, 3 & 4 year olds Status: Unsubmitted Deadline: 31 May 2017

Anu Providers | Anu service | Aut 18 2018 (01 Sep 18 - 31 Dec 18)

Filter by Forename or Surname or Age Information at any time until the deadline of 31 May 2017. X

Add Child Edit Headcount Download Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
	Test	Child School		24/05/2014	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
	1	Test 1	EH	23/05/2014	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
	2	Test 2	EH	03/05/2015	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
	5	Test 5	EH	24/05/2014	4	01/04/2018		0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Full Elg	Test Child	EH	24/10/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00

NOTES: The grid is pre-populated with information from One Early Years relating to children that are known to have attended the service recently. This includes children added through the Better Start portal, who have been matched or added in the Portal Back Office.

Hours that are pre-populated from the v4 Client are coloured green. If they have been added or updated in the headcount portal, they are coloured blue.

If a child was not attending the service when a task was created, but is later recorded against the service for the term in the v4 Client, the child is displayed on the headcount grid the next time that that the task is viewed and a pop-up notification is displayed above the grid for each child added.

If a child's school history is updated in the v4 Client so that they are now attending the provider during the period covered by the task, the child is displayed on the headcount grid the next time that that the task is viewed and a pop-up notification is displayed above the grid for each child added.

If the **Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** parameter on the **Headcount Configuration** page is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 Funded Services screen when the headcount task is created.








If the **Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** parameter on the **Headcount Configuration** page is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 Funded Services screen when the headcount task is created.

If there are any 3 or 4 year old children in the grid who do not have carer details recorded, unless the Local Authority has chosen not to collect carer information via the Provider portal, the child details are highlighted in red and the submit button is disabled.

If the provider is not allowed to claim hours for the child, the **Hours Claimed** columns are greyed out.

If a child was previously eligible, but is no longer eligible for 30 hours funding, the previous hours are displayed in the **Extended Hours** but the columns are greyed out.

The **Funding** column displays a coloured letter or symbol as shown in the following table:

Symbol	Description
	The child is eligible for Early Years Pupil Premium
	The child is eligible to receive extended hours childcare for one or more days in the term to which this task applies. The colour of this symbol changes to amber when the child nears the end of their eligibility or red when it is past their eligibility end date.
	The child is sharing funding with another service or another provider in the current term. The colour of this symbol changes to dark blue if the child shared funding in the previous term.
	The child became eligible for 2 year old funding before the start of the term being viewed and hovering over it displays the eligibility reference.
	The child cannot claim hours and does not have an override.
	The child has an override which is Force the system to never allow hours to be claimed.
	The child has an override, which is Force the system to always allow hours to be claimed.

- If required, select the **Funding** check box to only display children who are entitled to claim hours.
- If required, enter two or more characters of **Surname** to filter the list.

Prior to midnight on the task deadline date, child details and headcount information can be edited and a new child can be added.

NOTE: In order to perform an eligibility check on economic grounds for Early Years Pupil Premium, carer details must be recorded. Child details cannot be edited and headcount information cannot be submitted until either the carer details are recorded or the **Decline to Provide** radio button is selected.

To record carer details:

- Click the red button adjacent to the child's name to display the **Carer Details** tab.

Child Details

Personal Details Carer Details

Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non economic route e.g 'Looked-After' status (LAC).

Provide Carer Information * Yes Decline to provide

Previous Next

* Required field

Cancel Save

- Select the **Yes** radio button to display the **Carer Details** panel and record details of one or more carers. For more information, see [Recording Carer Details](#) on page 19. Alternatively, select the **Decline to provide** radio button.
- Click the **Save** button.

Home page

- When all the additions and changes to the headcount are complete, submit it to your Local Authority.

A task can be resubmitted as many times as required before the deadline. Each submission overwrites the previous submission for the task. However, after midnight on the task deadline date, only the Headcount Administrator can make additional submissions for the task.

NOTE: A Headcount Administrator with the necessary permissions can edit or submit a task after the deadline has past. A warning message is displayed to inform them that the deadline has passed and the changes may be rejected if the hours have already been processed.

More Information:

- [Editing Child Details](#) on page 18
- [Adding a Child to the Headcount](#) on page 20
- [Recording Carer Details](#) on page 19
- [Editing the Headcount Information](#) on page 23
- [Adding a New Attendance Line](#) on page 25
- [Submitting Headcount Information](#) on page 28

Editing Child Details

- Display the required headcount details and click the **Change Child Details** button adjacent to the child's name.

Child Details

Personal Details | Carer Details

Forename * Child's legal forename

Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy) *

Ethnicity *

First Language *

Funded Status

Eligibility Code

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed then type the correct address in the boxes provided. If you do not know the postcode, you can look it up [here](#).

House Number *

House Name *

Street Name *

District / Village *

Town *

County *

Postcode *

* Required field

- If required, select a **Funded Status** from the drop-down list to indicate whether or not hours can be claimed for this child.

NOTE: By default, the Funded Status is set to Let the system decide, but this can be overridden.

- If required, enter an **Eligibility Code**.

NOTE: A warning message is displayed if a thirty hour entitlement check has not been completed for this code.

- Click the **Save** button.
- If required, select the **Carer Details** tab to record new carer details. For more information, see [Recording Carer Details](#) on page 19.

Recording Carer Details

NOTE: The **Carer Details** tab is only displayed if the child is either 3 or 4 years old.

- Select the **Carer Details** tab.

Child Details

Personal Details | **Carer Details**

Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non economic route e.g 'Looked-After' status (LAG).

Provide Carer Information: **Yes**
 Decline to provide

Carer Details + Add Another Carer

Title: [dropdown]

Forename: [text input]

Surname: [text input]

Gender: **Male**
 Female

Date of Birth (dd/mm/yyyy): [calendar icon]

Relationship: [dropdown]

Parental Responsibility: Yes
 No
If the carer has legal responsibility for this child select Yes

Reference Number: **National Insurance**
 National Asylum Support Service

The format of all valid National Insurance Numbers is two prefix letters, six numeric digits, and one suffix letter. e.g. AB123456C.

Address: Does the applicant live at the same address as the child?
 Yes 39 Stanley Boulevard, Kierlington, Milford, Cardshire, C3 5DB
 No

Previous Next

* Required field

Cancel Save

- Edit the current details or click the **Add Another Carer** button to record new carer details. Alternatively, if the carer does not wish to provide any details, select the **Decline to provide** radio button.
- Click the **Save** button.

Adding a Child to the Headcount

Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 May 2017

test kp | kp ser | Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

You can edit and re-submit this information at any time until the deadline of 31 May 2017.
If you do make a change don't forget to re-submit.

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
<input checked="" type="checkbox"/>	Test	Child School	!	24/05/2014	3	24/05/2016		10.00	20.00	200.00	15.00	150.00	0.00	0.00

1. Display the required headcount details and click the **Add Child** button.

Add Child

Please enter the child's forename and surname

Forename

Surname

Cancel
Next

2. Enter a **Forename** and **Surname** and click the **Next** button to display the personal details tab.

NOTES: If there is already a child at the provider with this forename and surname, the details of the existing child are displayed on the **Duplicate Child Warning** screen. Also, if a child with this name has had an ad hoc 30 hours eligibility check performed, these details are also displayed. For more information, see [Checking for a Duplicate Child](#) on page 23.

If the name is longer than the field allows, the child needs to be added by the Local Authority via the v4 Client. A message is displayed. The message can be configured in the Provider portal via **Administration | Text Customisation**.

Add Child

Forename Child's legal forename

Middle Name

Surname

Gender Male Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

SEND Status

Eligibility Code

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed then type the correct address in the boxes provided. If you do not know the postcode, you can look it up here.

Postcode

Find Address
I don't have a Postcode

* Required field

Cancel
Save

NOTES: Middle Name and SEND Status are only displayed if the Local Authority have selected this option via the **Headcount Configuration** page. For more information, see [Updating](#) on page 54.

3. If required, enter **Middle Name**.
4. Select **Gender** and enter the **Date of Birth**.

NOTE: If the LA selected the Exclude Reception NCY check box when creating the task, you cannot add a child with a DOB that gives them an NCY of zero.

5. Select **Ethnicity** and **First Language** from the drop-downs.
6. If required, enter an **Eligibility Code**.
7. If required, select **SEND Status** (Lookup Table ID: 0608).
8. Enter a full or partial **Postcode** and click the **Find Address** button to display the list of matching addresses.
9. Select the required address to display the address details.
Alternatively, click the **Enter Address Manually** link and enter an address.
10. Click the **Save** button.

If the child is either 3 or 4 years old, the **Carer Details** panel is displayed

The screenshot shows the 'Child Details' form with the 'Carer Details' tab selected. The form contains the following elements:

- Section title: **Child Details**
- Tabs: **Personal Details** and **Carer Details**
- Text: Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non economic route e.g 'Looked-After' status (LAC).
- Form field: **Provide Carer Information *** with two radio buttons: **Yes** and **Decline to provide**.
- Navigation: **Previous** and **Next** buttons.
- Label: **Required field**
- Buttons: **Cancel** and **Save**.

11. Select the **Yes** radio button to display blank carer details or click the **Decline to Provide** radio button.
12. If the **Yes** radio button is selected, enter the **Carer Details**.

Add Child

Personal Details | Carer Details

Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non economic route e.g 'Looked-After' status (LAC).

Provide Carer Information * Yes
 Decline to provide

Carer Details + Add Another Carer

Title *

Forename *

Surname *

Gender * Male
 Female

Date of Birth (dd/mm/yyyy) *

Relationship *

Parental Responsibility * Yes
 No
If the carer has legal responsibility for this child select Yes

Reference Number * National Insurance
 National Asylum Support Service

The format of all valid National Insurance Numbers is two prefix letters, six numeric digits, and one suffix letter. e.g. AB123456C

Address * Does the applicant live at the same address as the child ?

13. If required, click the **Add Another Carer** button and add details of another carer.
14. Click the **Save** button.

NOTES: If the child is 3 or 4 years old, you will not be able to save the child details unless carer details are entered or the **Decline to Provide** radio button is selected.

Checking for a Duplicate Child

The **Duplicate Child Warning** page is displayed when you attempt to add a child to the headcount with the same **Forename** and **Surname**, but a different **Date of Birth** to one that already exists in One and is known to attend the provider. The page also displays children for whom a 30 hour ad hoc eligibility check has been performed, so that their details (date of birth and eligibility code) can be copied across when adding the child to One.

Duplicate Child Warning

• One or more children with this name are already included in this grid. X

Please cancel if the child has already been added to the grid, or add a new child if they are not listed

Forename	Surname	Date of birth	Gender	Current Address	Ethnicity	First Language	Eligibility Code
Alice	Brown	04/04/2013	Female	Travagga 2 (Bromley), near Travagga (Bromley) (M25)	WOB	ENB	55556666777

Cancel
Start Again
Add a new child

Click the **Cancel** button to display the **Headcount** grid.

Click the **Start Again** button to display the **Add Child** page.

Click the **Add a new child** button to continue adding this child.

Editing the Headcount Information

Headcount details can be edited before midnight on the deadline date.

NOTE: A Headcount Administrator with the necessary permissions can edit or submit a task after the deadline has past. A warning message is displayed.

- Select the required headcount from the provider home page to display the headcount details. The total value for each column is displayed in the column header.

Headcount (Actual) for 2, 3 & 4 year olds

Status: Submitted Deadline: 31 May 2017

vp2 / _ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

• You can edit and re-submit this information at any time until the deadline of 31 May 2017.
 • If you do make a change don't forget to re-submit. X

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
								10.00	10.00	100.00	10.00	100.00	0.00	0.00
<input type="checkbox"/>	Aa1		EH	01/01/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Mm1			02/01/2014	3	01/09/2017		10.00	10.00	100.00	10.00	100.00		
<input type="checkbox"/>	Andrew		EH	05/01/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Charles		EH	15/05/2015	2	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Cheryl		EH	20/07/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
<input type="checkbox"/>	Jimmy			15/08/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00

Hours that are pre-populated from the v4 Client are coloured green. If they have been added or updated in the Headcount portal, they are coloured blue.

The **Funding** column displays a coloured letter or symbol as shown in the following table:

Symbol	Description
	The child is eligible for Early Years Pupil Premium
	The child is eligible to receive extended hours childcare for one or more days in the term to which this task applies. The colour of this symbol changes to amber when the child nears the end of their eligibility or red when it is past their eligibility end date.
	The child is sharing funding with another service or another provider. The colour of this symbol changes to dark blue if the child shared funding in the previous term.
	The child became eligible for 2 year old funding before the start of the term being viewed and hovering over it displays the eligibility reference.
	The child cannot claim hours and does not have an override.
	The child has an override which is Force the system to never allow hours to be claimed.
	The child has an override, which is Force the system to always allow hours to be claimed.

- Click the **Edit Headcount** button to display the **Edit - Headcount** page.

NOTES: If the child is funded at another service, the **Shared Funding** check box is automatically selected.

The columns displayed depend on the options selected on the **Headcount Configuration** page. For more information, see [Displaying the Headcount Grid Configuration](#) on page 54.

- Edit the details as required:
 - Enter a new **Start Date** to update the child's school history record.

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

- Enter an **End Date**.

NOTE: You can enter an end date from the previous term.

- Select a **Stretched Offer**.

NOTE: The Stretched Offer column is only visible if the Local Authority has set up stretched offers in the v4 Client (Lookup Table ID: 1178) and they are active.

- d. Enter **Weeks Attended for term**.
- e. Enter **Average Hours Attended per week** to automatically calculate **Hours Attended for term**.
- f. Alternatively, enter **Hours Attended for term** to automatically calculate **Average Hours Attended per week**.
- g. Enter the hours claimed.

NOTES:

Extended Hours can only be entered if the child is currently eligible.

For payment periods starting on or after the 1st January 2018, Extended Hours cannot be claimed when the child's funding start date falls within the grace period. If the child is new to the provider (has no school history with this provider in the previous period) or has no claim for extended hours in the previous period, and if they are eligible at the start of the period, and if the grace period starts in the term, extended hours can be entered but a warning message is displayed.

Universal Hours Claimed per week is capped at 15 hours.
Extended Hours Claimed per week is capped at 15 hours.

If the hours claimed exceed the termly limits set up in One v4 Early Years, the payment limits are applied.

- h. Click the **Save** button.

Adding a New Attendance Line

When a child's attendance changes during the term, a new attendance line can be added for the child.

NOTES: The start and end dates for the attendance lines cannot overlap.
The **Add new attendance button** is only displayed if the **Add Line** check box is selected on the **Headcount Configuration** page. For more information, see [Updating Submission Grid Columns](#) on page 55.

Headcount (Actual) for 2, 3 & 4 year olds													Status: Submitted	Deadline: 31 May 2017	
Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term		
Aa1	Aa1	IP ELL	01/01/2014	3	01/09/2017		25.00	35.00	475.00	24.00	310.00	11.00	165.00		
Del1	Del1		01/02/2013	4	01/09/2017		10.00	10.00	100.00	10.00	100.00				
Mm1	Mm1	S	02/01/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00				
Charles		S	15/05/2015	2	01/09/2017		0.00	0.00	0.00	0.00	0.00				

1. Click the **Add new attendance line** button to display the confirmation dialog with the message: Are you sure you wish to copy this attendance line?
2. Click the **Yes** button to create a new attendance line for the child.

NOTE: The **Add new attendance** button is only displayed if the **Add Line** column is enabled on the **Headcount Configuration** page. For more information, see [Updating Submission Grid Columns](#) on page 55.

Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 May 2017

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You can edit and re-submit this information at any time until the deadline of 31 May 2017.
If you do make a change don't forget to re-submit

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term		
								25.00	35.00	475.00	24.00	310.00	11.00	165.00		
<input type="checkbox"/>	Aa1	Aa1	P EH S	01/01/2014	3	01/09/2017		15.00	25.00	375.00	14.00	210.00	11.00	165.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Dd1	Dd1		01/02/2013	4	01/09/2017		10.00	10.00	100.00	10.00	100.00			<input type="checkbox"/>	<input type="checkbox"/>
						01/09/2017		0.00	0.00	0.00	0.00	0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mm1	Mm1	S	02/01/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00			<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Charles		S EH	15/05/2015	2	01/09/2017		0.00	0.00	0.00	0.00	0.00			<input type="checkbox"/>	<input type="checkbox"/>

- Click the **Edit Headcount** button to display the **Edit Headcount** page.

Edit - Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 May 2017

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Legal Name	Funding	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
Aa1 Aa1	P EH S	01/09/2017			15.00	25.00	375.00	14.00	210.00	11.00	165.00
Dd1 Dd1		01/09/2017			10.00	10.00	100.00	10.00	100.00		
		01/09/2017			0.00	0.00	0.00	0.00	0.00		
Mm1 Mm1	S	01/09/2017			0.00	0.00	0.00	0.00	0.00		
Charles	S EH	01/09/2017			0.00	0.00	0.00				

- Enter an **End Date** for the new line.
- Update the **Start Date** for the original attendance line.
- Update attendance information as required.
- Click the **Save** button.

Deleting an Attendance Line

An attendance line that has not already been submitted can be deleted.

NOTE: The option to delete attendance lines can be disabled on the **Headcount Configuration** page by deselecting the **Delete Line** check box in the **Submission Grid Columns** panel. For more information, see [Updating Submission Grid Columns](#) on page 55.

To delete an attendance line:

Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 May 2017

vp2 / _ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

You can edit and re-submit this information at any time until the deadline of 31 May 2017
 if you do make a change don't forget to re-submit.

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term		
								25.00	35.00	475.00	24.00	310.00	11.00	165.00		
	Aa1	Aa1		01/01/2014	3	01/09/2017		15.00	25.00	375.00	14.00	210.00	11.00	165.00		
	Dd1	Dd1		01/02/2013	4	01/09/2017		10.00	10.00	100.00	10.00	100.00				
						01/09/2017		0.00	0.00	0.00	0.00	0.00				
	Mm1	Mm1		02/01/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00				
	Charles			15/05/2015	2	01/09/2017		0.00	0.00	0.00	0.00	0.00				

1. Click the **Delete attendance line** button to display a confirmation message.
2. Click the **Yes** button to confirm.

Exporting Headcount Information

Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 May 2017

vp2 / _ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

You can edit and re-submit this information at any time until the deadline of 31 May 2017
 if you do make a change don't forget to re-submit.

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term		
								10.00	10.00	100.00	10.00	100.00	0.00	0.00		
	Aa1			01/01/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
	Mm1			02/01/2014	3	01/09/2017		10.00	10.00	100.00	10.00	100.00				
	Andrew			05/01/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
	Charles			15/05/2015	2	01/09/2017		0.00	0.00	0.00	0.00	0.00				
	Cheryl			20/07/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
	Jimmy			15/08/2013	4	01/09/2017		0.00	0.00	0.00	0.00	0.00				

If required, click the **Download** button to export the headcount details to an Excel spreadsheet.

Submitting Headcount Information

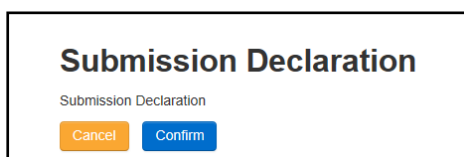
After entering all the required data for a task, it must be submitted to the Local Authority. Data submitted by providers is matched against information held in One via the Portal Back Office. The information is validated and securely processed into the Early Years module.

More Information

For more information about matching students via the Portal Back Office, refer to the *One Portal Back Office* handbook, under *Education Services | One Self Service* on the One Publications website.

To submit the headcount to your Local Authority:

1. Click the **Submit** button to send the headcount information to the Local Authority.
2. The **Submission Declaration** page is displayed.



The image shows a 'Submission Declaration' dialog box. It has a title 'Submission Declaration' and a subtitle 'Submission Declaration'. Below the subtitle are two buttons: 'Cancel' (orange) and 'Confirm' (blue).

3. Click the **Confirm** button to display a confirmation message.
4. Click the **Yes** button to confirm.

NOTES: The submission declaration is configured by the administrator via **Administration | Site Setup | Customise Text**.

The headcount can be edited and resubmitted up until midnight on the deadline date.

Viewing Data Submitted by a Provider

To view the headcount data that has been submitted:

1. View the required task. For more info, see [Viewing Tasks](#) on page 14.



The image shows a 'Task Details' page. The title is 'Task Details'. Below the title is the text 'Headcount (Actual) for Spring 17 2017 (01 Jan 18 - 31 Mar 18) for 3 year olds is required'. There is a search bar with '1 Task(s)' and 'Service: ALL' and a search icon. Below this is a table with columns: Provider, Service, Funded, Service Type, and Status. The table has one row: Provider: test kp, Service: kp ser, Funded: T, Service Type: Breakfast Clubs, Status: Imported. Below the table are two buttons: 'Back' (green) and 'New Message' (blue).

Provider	Service	Funded	Service Type	Status
test kp	kp ser	T	Breakfast Clubs	Imported

2. Click the service link to view the **Service Detail** page.

Service Detail

Headcount (Actual) for Spring 17 2017 (01 Jan 18 - 31 Mar 18) for 3 year olds is required

Provider	Service	Funded	Service Type	Status
test kp	kp ser	T	Breakfast Clubs	Imported

Children

Name	Date of birth	Status	Status Description	Status Date
Test Child School	24/05/2014	Imported	Imported Successfully	24/05/2017 08:14

[Back](#)
[View Task](#)

The **Children** panel lists the details that have been imported

- Click the **View Task** button to display the headcount data.

Headcount (Actual) for 3 year olds

test kp / kp ser Spring 17 2017 (01 Jan 18 - 31 Mar 18)

Status: Submitted Deadline: 31 May 2017

You can edit and re-submit this information at any time until the deadline of 31 May 2017.
If you do make a change don't forget to re-submit.

[Add Child](#)
[Edit Headcount](#)
[Download](#)
[Submit](#)

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
Test	Child	School	S	24/05/2014	3	24/05/2016	12/02/2018	20.00	15.00	300.00	11.25	225.00	0.00	0.00

NOTE: If children have been added to the grid since it was last viewed, a pop-up message is displayed above the grid.

Viewing Messages

The **My Messages** panel is displayed on the **Home** page and lists the messages sent by this administrator.

My messages

Submitted Submitted Yesterday 13:25

[View all messages](#)

- Click on a message to display the details. Alternatively, click the **View All Messages** link to display the **My Messages** page.

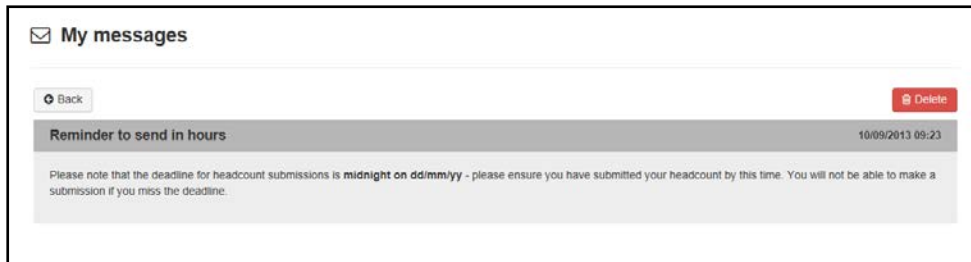
My messages

Subject Received

Reminder to send in hours 10-Sep-2013 09:23

- If required, click on the **Subject** or **Received** heading to sort the list.
- Click on a message to display the detail.

Home page



4. If required, click the **Delete** button to delete the message.
5. Click the **Back** button to display the **Home** page.

04 / Issuing Tasks

Introduction

Tasks are created by the Local Authority and request headcount information from Early Years providers. Providers must complete tasks that are assigned to them by the submission deadline.

Tasks are created via **Headcount | Tasks**. Once a task is issued, it is displayed on the recipient's (the provider's) **Home** page and an email alert is sent to their registered email address.

NOTE: The provider must be assigned to a base that has the B2B Student Base check box selected in the One v4 Client and the XML transfer option deselected in the One v3 Client. For more information, refer to the *Setting Up One Headcount for Local Authorities technical guide*.

Creating a New Task

NOTE: Tasks can only be created for active services.

Tasks can be created for:

- A specific group of services or service types.
- One or more age groups.
- A specific term (funding period).
- A payment type (forecast, actual or amendment).

Tasks are created using the New Task wizard.

1. Select **Headcount | Tasks** and click the **Create Task** button to display the **New Task** page.

2. Select a **Submission Type**.
3. Select a **Term**.
4. Select one or more check boxes to request the **Ages** to be included.
5. Select a **Deadline Date** for the information to be received.
6. If required, select the **Exclude Reception NCY** check box to display a tick.

NOTE: If this check box is selected, when the provider views the task, children with an NCY of zero are not displayed. Also, the provider cannot add a child with a DOB that gives them an NCY of zero.

7. Click the **Next** button to display the **Recipients** page.

Issuing Tasks

- Click the **To** button to display the **Select Services** page with all available services listed.

Provider	Service	Funding Type	Service Type
<input type="checkbox"/> Providers	Provider - Breakfast Clubs		Breakfast Clubs
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	service	Funded (T)	Extended Play Group
<input type="checkbox"/> Provider1	ARCDEL INTG Provider Service	Funded (T)	Childminder
<input type="checkbox"/> Provider1	ARCDEL INTG Service2	Funded (T)	Combined Nursery Centre
<input type="checkbox"/> Provider2	ARCDEL Service1	Funded (T)	Breakfast Clubs
<input type="checkbox"/> Lower School	Maintained Nursery Schools/Cla	Funded (T)	Maintained Nursery Schools/Cla

- If required, enter a partial **Provider** or **Service Name** and click the **Search** button to display matching services.

Alternatively, select a service group from the **Service** drop-down.

Refine the search further by applying a **Funding Type** or **Service Type** filter.

Click the cross button to remove the filter.

- Select the check box for one or more services or click the **Add All** button to display the services in the **Selected Services** box.

Provider	Service	Funding Type	Service Type
<input checked="" type="checkbox"/> EYProvider	EYService	Funded (T)	Childminder
<input checked="" type="checkbox"/> EYProvider1	EYService1	Funded (T)	Early Excellence Centre
<input checked="" type="checkbox"/> EYProvider3	EYService3	Funded (T)	Wraparound Care

- Click the **Continue** button to display the **New Task** page with **Selected Services for this Task** displayed.

New Task

Step 1 Headcount ✓ | Step 2 Recipients ▾ | Step 3 Issue ▶

Selected Services for this Task

To: [3 Service(s)]

Note: Some of these services do not have the B2B import flag set, when the task is created it will automatically be set.

EYProvider EY Service | EYProvider1 EYService1 | EYProvider2 EYService2

Cancel Previous Next

12. Click the **Next** button to display the **Issue** page.

NOTE: An error message is displayed if a required field on a previous step is missing. To complete the field, click the relevant **Step** button to display that step or alternatively, click the **Previous** button to display the previous step.

New Task

Step 1 Headcount ✓ | Step 2 Recipients ✓ | Step 3 Issue ▾

Summary

Please confirm that your information is correct

Submission Type: Forecast

Term: Spring 2018

Ages: 2 year olds, 3 year olds, 4 year olds

Exclude Reception:

Deadline Date: 22/12/2017

Task Name: Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required

Selected: 3 Service(s)

Cancel Previous Send

13. Click the **Send** button to issue the task and display the **Task Sent** dialog.

Task Sent

Your task has been created and sent.

OK

14. Click the **OK** button to display the **Tasks** page listing the tasks that have been issued.

Issuing Tasks

Tasks

Create Task

5 Task(s) Service: ALL

Name	Created	Deadline	Issued By	Service Status	Actions
Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required	14/09/2017 15:26:21	22/12/2017	LESLEYADMIN	3 0 0	Retract
Headcount (Forecast) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds, 3 year olds, 4 year olds is required	11/09/2017 18:23:50	22/09/2017	SIMONM	2 0 0	Retract
Headcount (Actual) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds is required	11/09/2017 10:15:19	30/09/2017	NAVED	0 1 0	Retract
Headcount (Forecast) for Autumn 2017 (01 Sep 17 - 31 Dec 17) for 2 year olds, 3 year olds, 4 year olds is required	06/07/2017 15:14:19	01/12/2017	TRACY	2 0 0	Retract
Headcount (Forecast) for Spring Term 2014 for 2 year olds, 3 year olds, 4 year olds is required	20/01/2015 05:23:25	22/01/2015	HEADCOUNTADMIN4	1 0 0	

Viewing Issued Tasks

The **Tasks** page displays a list of issued tasks. It enables you to monitor progress made by providers, send messages to providers and to retract a task, if required.

NOTE: Tasks can only be viewed for active services.

1. Select **Headcount | Tasks** to display the **Tasks** page.

Tasks

Create Task

5 Task(s) Service: ALL

Name	Created	Deadline	Issued By	Service Status	Actions
Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required	14/09/2017 15:26:21	22/12/2017	LESLEYADMIN	3 0 0	Retract
Headcount (Forecast) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds, 3 year olds, 4 year olds is required	11/09/2017 18:23:50	22/09/2017	SIMONM	2 0 0	Retract
Headcount (Actual) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds is required	11/09/2017 10:15:19	30/09/2017	NAVED	0 1 0	Retract
Headcount (Forecast) for Autumn 2017 (01 Sep 17 - 31 Dec 17) for 2 year olds, 3 year olds, 4 year olds is required	06/07/2017 15:14:19	01/12/2017	TRACY	2 0 0	Retract
Headcount (Forecast) for Spring Term 2014 for 2 year olds, 3 year olds, 4 year olds is required	20/01/2015 05:23:25	22/01/2015	HEADCOUNTADMIN4	1 0 0	

2. If required, select a service to display tasks for that service only.
 - a. Click the browse button to display the **Select Service** dialog.

Select Service ✕

Please select a service

Provider:

- b. Select a service from the drop-down.
 - c. Click the **OK** button.
3. The **Service Status** displays the number of tasks with each status (**Not Submitted** (red), **In Progress** (yellow) or **Completed** (green)).

- If required, click the task **Name** hyperlink to display the **Task Details** page.

Task Details

Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required

3 Task(s) Service: ALL

Provider	Service	Funded	Service Type	Status
EYProvider1	EYProvider_Service1	T	Early Excellence Centre	Not started
EYProvider10	EYProvider_Service10.2	T	Childminder	Not started
EYProvider3	EYProvider_Service3	T	Wraparound Care	Not started

- If required, click the service hyperlink to display the **Service Detail** page.

Service Detail

Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required

Provider	Service	Funded	Service Type	Status
EYProvider1	EYProvider_Service1	T	Early Excellence Centre	Not started

Children

Name	Date of birth	Status	Status Description	Status Date
There are no results to display. <input type="button" value="X"/>				

- If required, click the **View Task** button to display the headcount grid.

Sending a New Message

To send a new message to the service, click the **New Message** button to display the **Compose New Message** page.

More Information:

[Composing a New Message](#) on page 37

Retracting a Task

If required, the task can be retracted. Retracting a task prevents any further action on that task by service providers. Data that was submitted before the task was cancelled, is still imported into One.

- Click the **Retract** link to display the **Retract task** dialog.
- Enter a **Reason** for retracting the task.
- Click the **Retract** button.

Editing a Task after the Deadline

A Headcount administrator with both the Headcount User and Headcount Site Administrator business processes enabled, can edit and submit a headcount task after the deadline has passed.

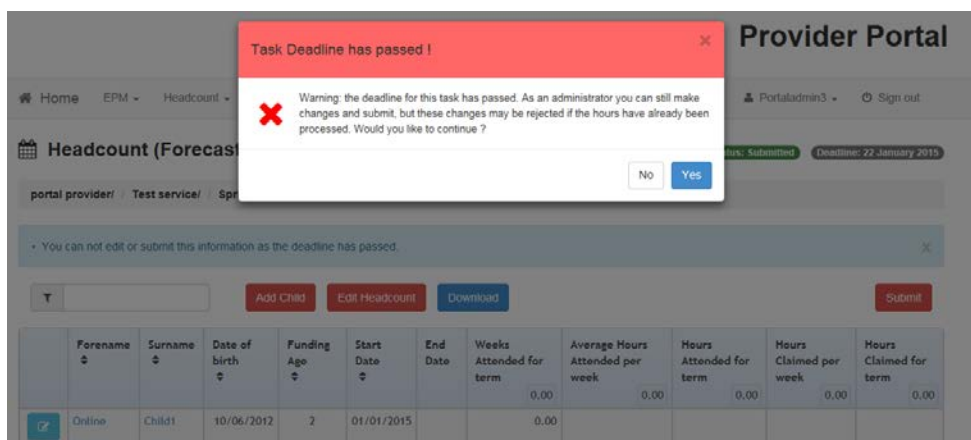
1. View a list of tasks and select the required task. For more information, see [Viewing Issued Tasks](#) on page 34.
2. Click the provider link to display the **Service Details** page.
3. Click the **View Task** button to display the headcount grid.

The **Add Child**, **Edit Child** and **Submit** buttons are displayed in red.

4. Make the required changes and click the **Submit** button.

A warning message is displayed.

5. Click the **Yes** button to continue with the changes.



05 / Sending Messages

Introduction

The **Messages** option is used to compose messages to providers or services and to view a log of messages sent. It is selected from the **Headcount** menu.

Composing a New Message

NOTE: Messages can only be sent to active services.

1. Select **Headcount | Messages** and click the **Compose Message** button.

2. Click the **To** button to display the **Select Message Recipients** dialog.

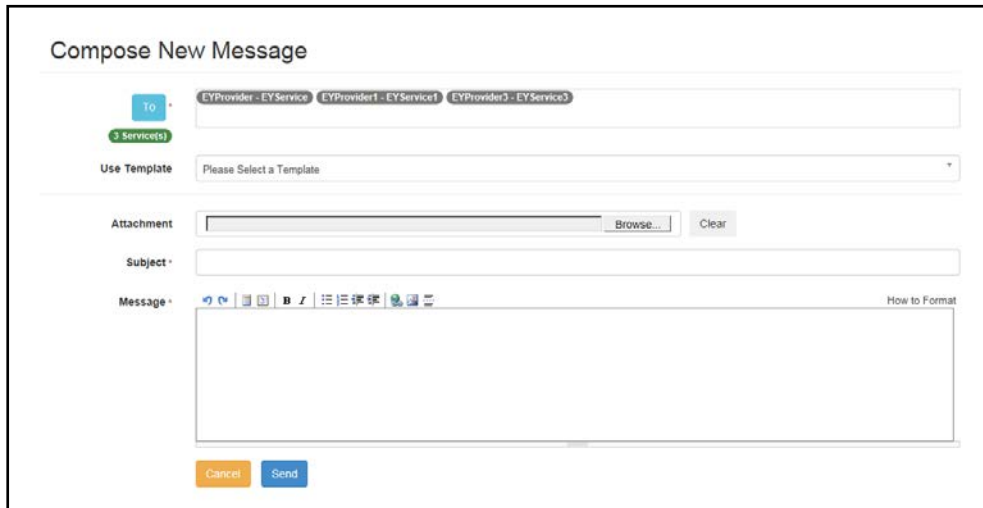
Provider	Service	Funding Type	Service Type
Providers	Provider - Breakfast Clubs		Breakfast Clubs
Providers	Childminder		Childminder
Providers	Childminder		Childminder
Providers	Childminder		Childminder
Providers	Childminder		Childminder
Providers	service	Funded (T)	Extended Play Group
Provider1	ARCDEL INTG Provider Service	Funded (T)	Childminder
Provider1	ARCDEL INTG Service2	Funded (T)	Combined Nursery Centre
Provider2	ARCDEL Service1	Funded (T)	Breakfast Clubs
Lower School	Maintained Nursery Schools/Cla	Funded (T)	Maintained Nursery Schools/Cla

- a. Enter a full or partial provider or service **Name** and click the **Search** button to display a list of matching services in the **Search Results**. Alternatively, select a service group from the

Sending Messages

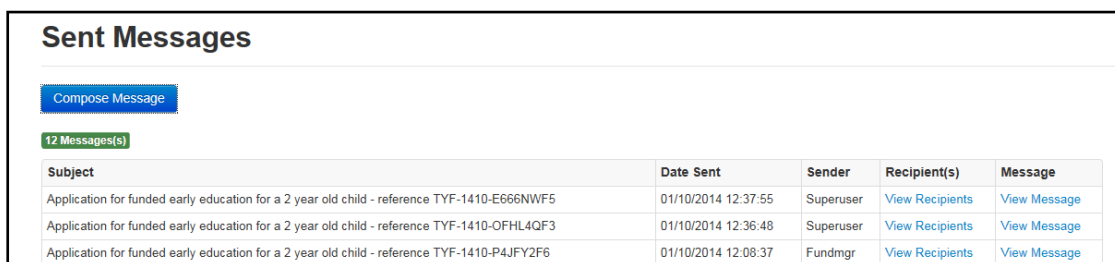
Service drop-down. Refine the search further by applying a **Funding Type** or **Service Type** filter.

- b. Select one or more services to display the service name in the **Selected Services** box. Alternatively, click the **Add All** button to select all of the services found.
- c. After selecting all required recipients, click the **Continue** button to display the **Compose New Message** dialog.



3. Select a message **Template** to automatically complete the **Subject** and the **Message**. If required, edit the text in these fields.
4. If required, click the **Browse** button to select an **Attachment**.
5. Click the **Send** button to display the **Message Sent** dialog.
6. Click the **OK** button to display the **Sent Messages** page.

Viewing Sent Messages



Subject	Date Sent	Sender	Recipient(s)	Message
Application for funded early education for a 2 year old child - reference TYF-1410-E666NWF5	01/10/2014 12:37:55	Superuser	View Recipients	View Message
Application for funded early education for a 2 year old child - reference TYF-1410-OFHL4QF3	01/10/2014 12:36:48	Superuser	View Recipients	View Message
Application for funded early education for a 2 year old child - reference TYF-1410-P4JFY2F6	01/10/2014 12:08:37	Fundmgr	View Recipients	View Message

This page is displayed when you click the **OK** button on the **Messages Sent** dialog or select **Headcount | Messages**. The number of **Messages Sent** is displayed and, for each message, the **Subject**, **Date Sent** and **Sender** are displayed.

To view the recipients of a message, click the **View Recipients** link to display the **Recipients** page.

To view the message, click the **View Message** link to display the **View Message** page.

Viewing Recipients

Recipients		
Back		
Subject	Date Sent	Sender
Application for funded early education for a 2 year old child - reference TYF-1410-F1SR6YF2	01/10/2014 11:37:15	Fundmgr
1 Recipient(s)		
Provider	Service	Status
[Redacted]	Sessional Care	<input checked="" type="checkbox"/> Unread

For each recipient, the **Provider**, **Service** and **Email Address**, the **Status** of the message and the sender's **User** name are displayed.

Viewing a Message

View Message

Headcount Estimate required - reference [Redacted] 04/03/2015 12:31

Dear [Redacted]

Please send your headcount estimate...

If you have any questions regarding your estimate, please contact us on 01011 123456 or email contact@thisauthority.com

Regards

Headcount Team, This LA

[Visit our website](#)

[Back](#)

The **View Message** page is displayed when you click the **View Message** link on the **Sent Messages** page.

06 / Managing Imports

Introduction

When the Provider Self Service portal is first configured, a scheduled task is set up in One v4 to import headcount information from the Provider portal.

The **Manage Headcount Imports** page is used to enable or disable the task and schedule the import. It is also used to view details of previous imports.

Updating the Scheduled Import

To change the scheduled time of the import:

1. Select **Headcount | Manage Imports** to display the **Manage Headcount Imports** page.

Manage Headcount Imports

Schedule Import of Headcount Submissions

Import headcount submissions daily at

Task Enabled

Import History

8 Imports(s)

	Start time	End time	Status	Submission Import Status
View Submissions	3/3/2015 6:58:05 AM	3/3/2015 6:58:08 AM	Successful	0 1
View Submissions	3/3/2015 6:20:05 AM	3/3/2015 6:20:05 AM	Successful	0 1
View Submissions	3/3/2015 5:28:05 AM	3/3/2015 5:28:06 AM	Successful	0 1
View Submissions	3/2/2015 2:10:05 PM	3/2/2015 2:10:06 PM	Successful	0 1
View Submissions	3/2/2015 11:14:05 AM	3/2/2015 11:14:07 AM	Successful	0 1
View Submissions	3/2/2015 10:50:05 AM	3/2/2015 10:50:07 AM	Successful	0 3
View Submissions	3/2/2015 9:36:05 AM	3/2/2015 9:36:07 AM	Successful	0 1
View Submissions	3/2/2015 9:02:05 AM	3/2/2015 9:02:06 AM	Successful	0 1

2. Click the **Import headcount submissions daily at**
3. Select a new time.
4. Click the **Save** button.

Enabling/Disabling the Scheduled Import

1. Select **Headcount | Manage Imports** to display the **Manage Headcount Imports** page.
2. Click **Task Enabled** to change the status.
3. Click the **Save** button.

Viewing Previous Imports

The number of **Previous Imports** and the **Status** of each import is displayed.

To view the **Import Details**, click the **View Submissions** hyperlink.

Import Details

1 Submission(s)

	Provider	Service	Submission Type	Submission Date	Children Status	Stretched offer association
View submitted data			Actual	28/01/2016 13:35:57	0 6	0

[Back](#)

To view the details of the submitted data, click the **View submitted data** hyperlink.

Submission Import Details

Provider	Service	Submission Type	Submission Date	Children Status	Stretched offer association
		Actual	28/01/2016 13:35:57	0 6	0

Children

Forename	Surname	Gender	Date of birth	Status Date	Status	Status Description
Vicki		Female	19/06/2010	28/01/2016 13:36:37		Imported Successfully
Vicki		Female	19/06/2010	28/01/2016 13:36:37		Imported Successfully
Marthas		Female	08/04/2011	28/01/2016 13:36:37		Imported Successfully
Marthas		Female	08/04/2011	28/01/2016 13:36:37		Imported Successfully
T1	T1	Male	01/01/2010	28/01/2016 13:36:37		Imported Successfully
T1	T1	Male	01/01/2010	28/01/2016 13:36:37		Imported Successfully

[Back](#) [View Task](#)

To view the task details, click the **View Task** button.

07 / Managing Reports

Introduction

Portal Administrators can create reports based on pre-configured Crystal reports, and send them to providers. The **Reports** option is selected from the **Headcount** menu.

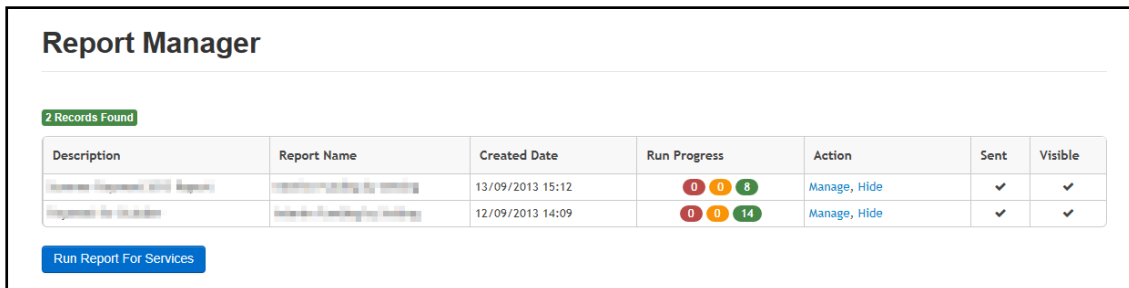
Generating Reports

A report can be created based on a pre-configured Crystal report.

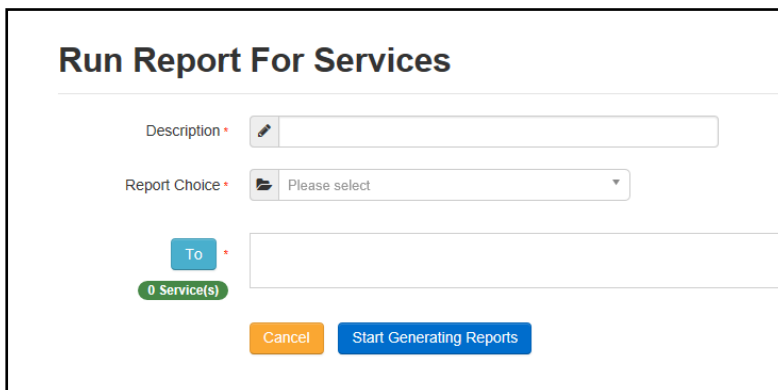
NOTES: Reports can only be generated for active services.

The service identifier must be passed to the Crystal Report as a parameter. For a report to be meaningful, it must use the service identifier when formatting the data. This is the only means of ensuring that service providers receive reports containing relevant data.

1. Select **Headcount | Reports** to display the **Report Manager** page.



2. Click the **Run Report for Services** button to display the **Run Report for Services** page.



3. Enter a **Description** for the report.
4. Select a **Report Choice**.
5. Click the **To** button to display the **Report Recipient** page.

Report Recipient

Name Page 1 of 10 [1](#) [2](#) [3](#) [4](#) [5](#) [> 10](#) [Next >>](#)

Search Results
92 Service(s)

Provider	Service	Funding Type	Service Type
<input type="checkbox"/> Providers	Provider - Breakfast Clubs		Breakfast Clubs
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Anu service	Funded (T)	Extended Play Group
<input type="checkbox"/> Provider1	ARCDEL INTG Provider Service	Funded (T)	Childminder
<input type="checkbox"/> Provider1	ARCDEL INTG Service2	Funded (T)	Combined Nursery Centre
<input type="checkbox"/> Provider2	ARCDEL Service1	Funded (T)	Breakfast Clubs
<input type="checkbox"/> Lower School	Maintained Nursery Schools/Cla	Funded (T)	Maintained Nursery Schools/Cla

Selected Services
0 Service(s)

There are no selected services.

- If required, enter a partial provider or service **Name** and click the **Search** button to display matching records in the **Search Results**. Alternatively, select a service group from the **Service** drop-down. Refine the search further by applying a **Funding Type** or **Service Type** filter.
- Select recipients from the **Search Results** by selecting the adjacent check box. Alternatively, click the **Add All** button to select all the displayed services.
- Click the **Continue** button to display the **Run Report For Services** page.

Run Report For Services

Description

Report Choice

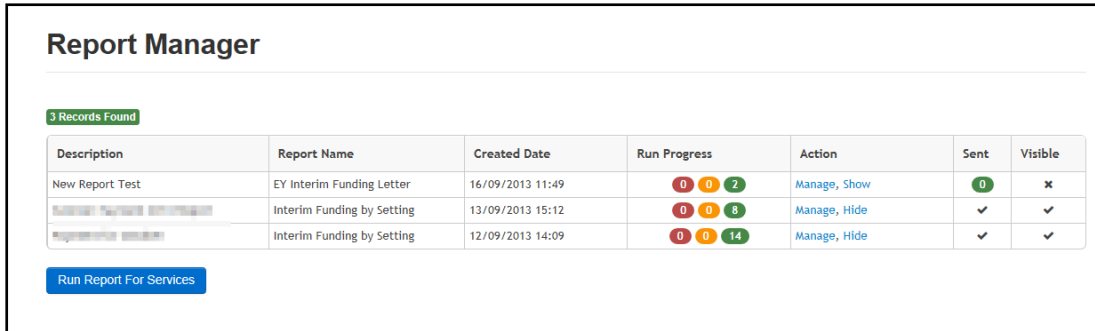
To

- Click the **Start Generating Reports** button to display a confirmation message.
- Click the **Yes** button to confirm and display the **Report Submitted** page.

Report Submitted

Your report has been submitted to the report server. The generation of the reports for the chosen services may take some time and can be viewed within the Report Manager screen.

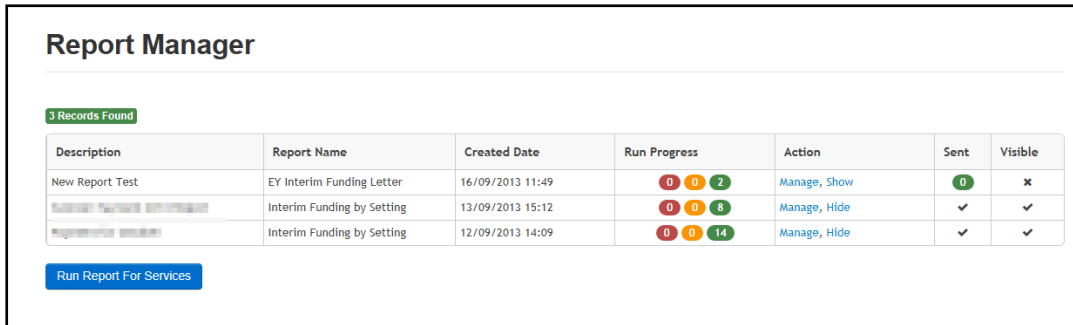
- Click the **OK** button to display the **Report Manager** page.



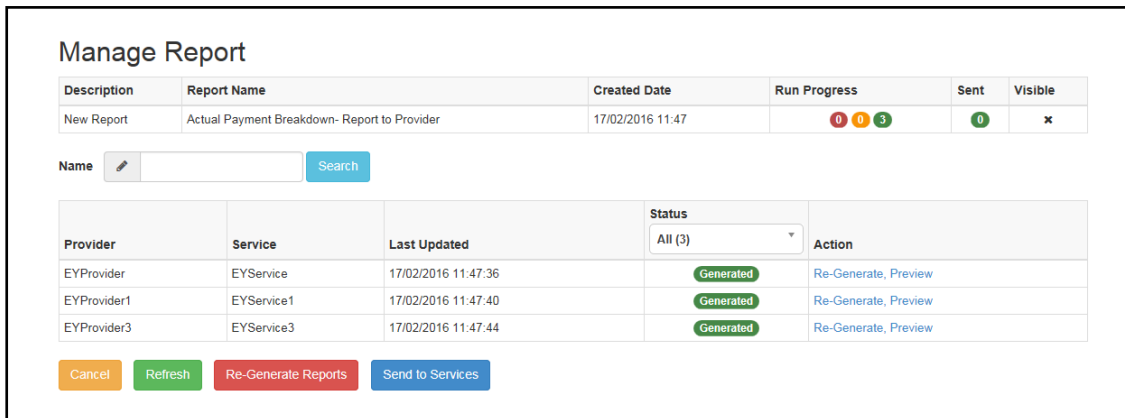
The **Report Manager** page enables you to see the **Run Progress** of a report, whether a report has been **sent** to the provider and to hide a report, if required. It also enables you to manage reports that have been generated.

Sending a Report

1. Select **Headcount | Reports** to display the **Report Manager** page.



2. Click the **Manage** hyperlink to display the **Manage Report** page with a list of providers and services for which this report has been generated.



3. Click the **Send to Services** button to send an email alert to the registered email address of the listed **Providers**.

The Early Years provider (Headcount user) can view the report by selecting the **Headcount | Payment History** menu route and clicking the **View Report** hyperlink.

Payment History

01 Marks - Full Day Care

5 Report(s)

Report Date	Description	Actions
15/10/2013	Interim funding of report	View Report
15/10/2013	My report for learning	View Report
15/10/2013	all	View Report
15/10/2013	Interim funding	View Report
15/10/2013	Interim funding	Not available

[Back](#)

More Information:
[Viewing Payment History](#) on page 47

Managing Generated Reports

1. Select **Headcount | Reports** to display the **Report Manager** page.
2. Click the **Manage** hyperlink to display the **Manage Report** page with a list of providers and services for which this report has been generated.

Manage Report

Description	Report Name	Created Date	Run Progress	Sent	Visible
interim funding by setting	Interim Funding by Setting	01/10/2013 07:56	0 0 1	✓	✓

Name [Search](#)

Provider	Service	Last Updated	Status	Action
daycare	daycare	01/10/2013 07:57:17	All (1) <input type="text"/>	Sent Re-Generate Preview

[Cancel](#)
[Refresh](#)
[Re-Generate Reports](#)
[Send to Services](#)

3. If required, enter a partial provider or service name and click the **Search** button.
4. If required, select a **Status** to limit the list of providers and services.

Re-generating a report

To re-generate a report for a service in the list, click the **Re-Generate** link for the required report.

To re-generate reports for all the services in the list, click the **Re-Generate Reports** button.

Previewing a report

To preview a generated report for a service in the list, click the **Preview** button.

Viewing Payment History

Headcount users and administrators can view the Payment History for the services to which they have access.

1. Select **Headcount | Payment History** to display the **Payment History - Select service** page.

Payment History - Select service

Provider:

Funded Service:

[Select](#)

2. Select a **Provider** from the list of providers to which you have access.
3. Select the required **Funded Service** and click the **Select** button to display the **View Payment History** page.

A list of reports sent to this service is displayed.

View Payment History

Check End Lines School - Full Day Care

2 Reports found

Report Date	Description	Actions
13/09/2013	Summer Payment 2013 Report	View Report
12/09/2013	Payment for October	View Report

[Back](#)

4. Click the **View Report** button to display the report.

08 / Managing Service Groups

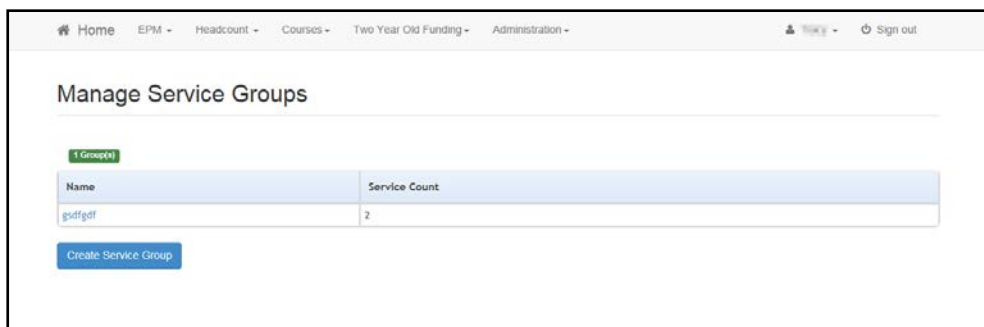
Introduction

Services can be grouped together to enable you to process several services together when creating tasks, composing messages or generating reports.

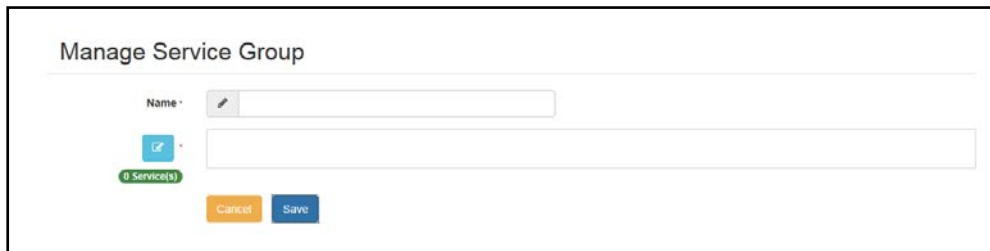
Creating a Service Group

To create a new service group:

1. Select **Service Groups** from the **Headcount | Administrator** menu to display the **Manage Service Groups** page.



2. Click the **Create Service Group** button to display the **Manage Service Group** page.



3. Enter a **Name**.
4. Click the browse button to display the **Select Services for Group** page.

Managing Service Groups

Select Services for Group - Service Group 2

Name Search

Page 1 of 10 1 2 3 4 5 > 10 Next >>

Search Results 12 Service(s)

Provider	Service	Funding Type	Service Type
<input type="checkbox"/> Providers	Provider - Breakfast Clubs		Breakfast Clubs
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	Childminder		Childminder
<input type="checkbox"/> Providers	service	Funded (T)	Extended Play Group
<input type="checkbox"/> Provider1	ARCDEL INTG Provider Service	Funded (T)	Childminder
<input type="checkbox"/> Provider1	ARCDEL INTG Service2	Funded (T)	Combined Nursery Centre
<input type="checkbox"/> Provider2	ARCDEL Service1	Funded (T)	Breakfast Clubs
<input type="checkbox"/> Lower School	Maintained Nursery Schools/Cla	Funded (T)	Maintained Nursery Schools/Cla

Add All Remove All

Selected Services 0 Service(s)

There are no selected services

Cancel Clear Continue

5. If required, to filter the list:
 - a. Enter one or more characters of the **Name** and click the **Search** button to display matching services.
 - b. Select a **Service**, **Funding Type** or **Service Type** from the drop-downs.
6. Select one or more check boxes adjacent to the required services to add them to the **Selected Services** box.
Alternatively, click the **Add All** button to add all of the displayed services to the **Selected Services** box.
7. Click the **Continue** button.
8. Click the **Save** button.

Displaying a Service Group

1. Select **Service Groups** from the **Headcount | Administrator** menu to display the **Manage Service Groups** page showing the **Name** and number of services in each current group.

Manage Service Groups

2 Group(s)

Name	Service Count
gndfjdf	2
sg2	5

Create Service Group

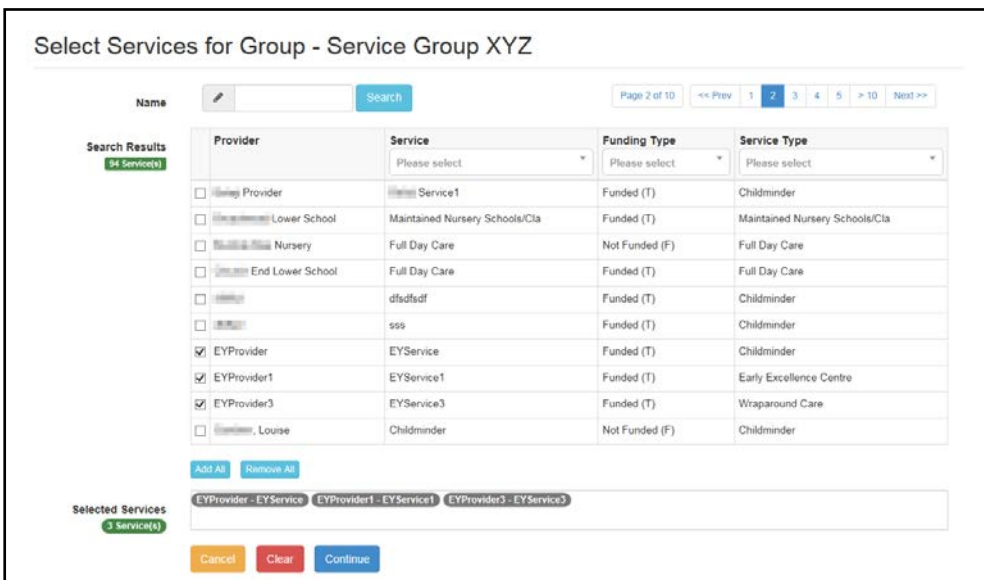
2. Click the **Name** link to display the **Manage Service Group** page with the current list of services in the group.



Updating a Service Group

To add new services or remove services from a group:

1. Display the required service group. For more information, see [Displaying a Service Group](#) on page 50.
2. Click the browse button adjacent to the list of services to display the **Select Services for Group** page.



3. To add an additional service to the group:
 - a. If required, enter one or more characters of the **Name** and click the **Search** button to display matching services.
 - b. You can also filter the list by selecting a **Service**, **Funding Type** or **Service Type** from the drop-downs.
 - c. Select one or more check boxes adjacent to the required services to add them to the **Selected Recipients** box.

Alternatively, click the **Add All** button to add all of the displayed services to the **Selected Services** box.

Alternatively, to remove a service from the group, deselect the adjacent check box or click the **Remove All** button to remove all selected services.

4. Click the **Continue** button.
5. Click the **Save** button

Deleting a Service Group

1. Display the required service group. For more information, see [Displaying a Service Group](#) on page 50.



2. Click the **Delete** button to display a confirmation dialog.
3. Click the **Yes** button.

09 / Managing Headcount Configuration

Headcount Configuration Page

Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.

Headcount Configuration

Add/Edit Child

Configuration Key	Configuration Value	
Collect Carer Information	<input type="checkbox"/> OFF	
Allow the middle name of the child to be collected	<input type="checkbox"/> OFF	
Allow the SEND status of the child to be collected	<input type="checkbox"/> OFF	

Headcount Grid Configuration

Configuration Key	Configuration Value	
Always allow pay hours to be claimed regardless of whether the child is funded.	<input type="checkbox"/> OFF	
Combine Universal and Extended Pay Hours Columns.	<input checked="" type="checkbox"/> ON	
Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="checkbox"/> OFF	
Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="checkbox"/> OFF	

Submission Grid Columns

<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	Delete Line	Add Line	

Edit Grid Columns

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Legal Name	Funding	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	

Displaying the Add/Edit Child panel

The **Add/Edit** panel enables the Local Authority to specify whether or not to collect the following headcount information via the Provider portal:

- Carer Information.
- Middle name of the child.
- SEND status of the child.

Each **Configuration Key** has a **Configuration Value** set to either **On** (to collect this information) or **Off**, (to not collect this information).

Add/Edit Child

Configuration Key	Configuration Value	
Collect Carer Information	<input type="checkbox"/> OFF	
Allow the middle name of the child to be collected	<input type="checkbox"/> OFF	
Allow the SEND status of the child to be collected	<input type="checkbox"/> OFF	

Updating Add/Edit Child Details

Add/Edit Child		
Configuration Key	Configuration Value	▲
Collect Carer Information	<input type="button" value="OFF"/>	
Allow the middle name of the child to be collected	<input type="button" value="OFF"/>	
Allow the SEND status of the child to be collected	<input type="button" value="OFF"/>	

NOTES: If **Collect Carer Information** is set to **On**, the headcount cannot be submitted unless carer information is recorded for each 3 or 4 year old child at the setting, or the **Decline to provide** radio button is selected for that child. For more information, see [Recording Carer Details](#) on page 19. If the middle name or SEND status is collected via the portal, they are passed through B2B with the other details of the child.

If **Allow Pay Hours to be claimed regardless of whether child is funded** is set to **On**, all values on the headcount grid are enabled regardless of the child's **Funded Status**.

To update the **Configuration Value**:

1. Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.
2. Click the **Configuration Value** button adjacent to the required **Configuration Key** to change the value.
3. Click the **Save** button.

Displaying the Headcount Grid Configuration

The **Headcount Grid Configuration** panel enables the Local Authority to control the configuration of the headcount grid:

Headcount Grid Configuration		
Configuration Key	Configuration Value	▲
Always allow pay hours to be claimed regardless of whether the child is funded.	<input type="button" value="OFF"/>	
Combine Universal and Extended Pay Hours Columns.	<input type="button" value="OFF"/>	
Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="button" value="OFF"/>	
Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="button" value="OFF"/>	

If **Allow Pay Hours to be claimed regardless of whether child is funded** is set to **On**, all values on the headcount grid are enabled regardless of the child's **Funded Status**.

If **Combine Universal and Extended Pay Hours Columns** is set to **On** (default), universal and extended columns are combined on the headcount grid. If it is set to **Off**, providers can enter universal and extended hours separately.

If **Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 **Funded Service** screen when the headcount task is created.

If **Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 **Funded Service** screen when the headcount task is created.

Updating Headcount Grid Configuration

Configuration Key	Configuration Value	
Always allow pay hours to be claimed regardless of whether the child is funded.	<input type="checkbox"/> OFF	
Combine Universal and Extended Pay Hours Columns.	<input type="checkbox"/> OFF	
Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="checkbox"/> OFF	
Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).	<input type="checkbox"/> OFF	

NOTES: If *Always allow pay hours to be claimed regardless of whether the child is funded* is set to **On**, all values on the headcount grid are enabled regardless of the child's **Funded Status**.

To update the **Configuration Value**:

1. Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.
2. Click the **Configuration Value** button adjacent to the required **Configuration Key** to change the value.
3. Click the **Save** button.

Displaying Submission Grid Columns

The **Submission Grid Columns** panel is used to specify which columns are displayed and which are hidden when the provider is submitting their headcount. The grid is initially set to display all columns. **Forename** and **Surname** cannot be hidden.

If **Combine Universal and Extended Pay Hours Columns** is set to **On**, the panel is displayed at follows:

Submission Grid Columns															
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	Delete Line	Add Line	

If **Combine Universal and Extended Pay Hours Columns** is set to **Off**, the panel is displayed at follows:

Submission Grid Columns															
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term	Add Line

Updating Submission Grid Columns

The **Submission Grid Columns** panel is used to specify which columns are displayed and which are hidden when the provider is submitting their headcount. The grid is initially set to display all columns. **Forename** and **Surname** cannot be hidden.

To update the grid:

1. Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.
2. Deselect the check boxes for columns that you want to hide and ensure that check boxes are selected for columns that you want to display.
3. Click the **Save** button.

NOTE: If the **Add Line** check box is selected, it enables multiple lines to be recorded for a child. If the **Delete Line** check box is selected, it enables multiple attendance lines to be deleted.

For more information about submitting the headcount, see [Executing a Task](#) on page 14.

Displaying Edit Grid Columns

The **Edit Grid Columns** panel is used to specify which columns are displayed on the **Edit Headcount** page. For more information, see [Editing the Headcount Information](#) on page 23.

The grid is initially set to display all columns. **Legal Name**, **Start Date**, **End Date** and **Hours Claimed for term** cannot be hidden.

If Combine Universal and Extended Pay Hours Columns is set to On, the panel is displayed at follows:

Edit Grid Columns										
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Legal Name	Funding	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	

If Combine Universal and Extended Pay Hours Columns is set to Off, the panel is displayed at follows:

Edit Grid Columns												
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Legal Name	Funding	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term	

Updating Edit Grid Columns

The **Edit Grid Columns** panel is used to specify which columns are displayed on the **Edit Headcount** page. For more information, see [Editing the Headcount Information](#) on page 23.

The grid is initially set to display all columns. **Legal Name**, **Start Date**, **End Date** and **Hours Claimed for term** cannot be hidden.

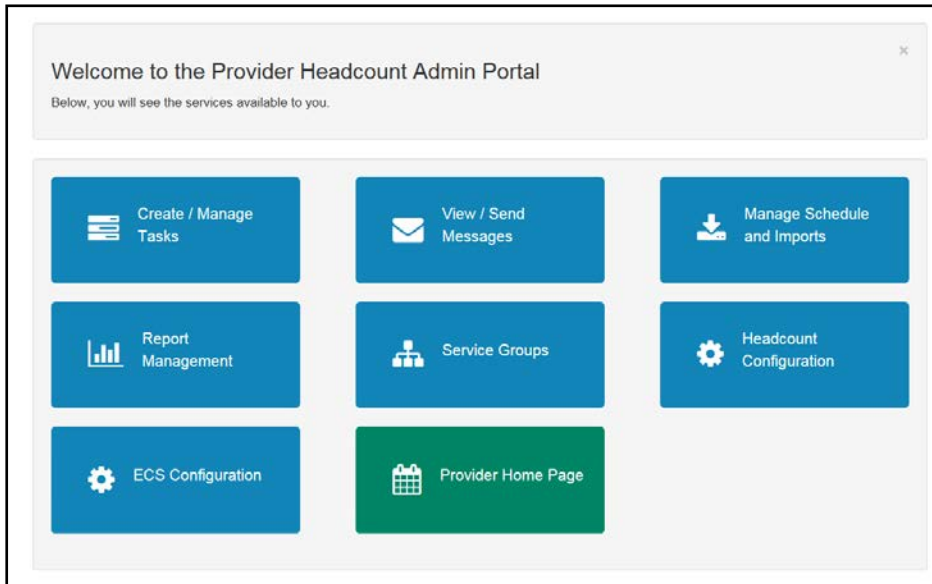
To update the grid:

1. Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.
2. Deselect the check boxes for columns that you do not want to display and ensure that check boxes are selected for columns that you do want to display.
3. Click the **Save** button.

10 / Configuring ECS

Introduction

To perform eligibility checks, the Eligibility Checking System (ECS) must be configured.



On the **Provider Headcount Admin Portal** home page, click the **ECS Configuration** button to display the **ECS Configuration** page.

Configuring the Link to the ECS

ECS Configuration

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 Configuration

Configure the link to the DWP Eligibility Checking Service

ECS Settings

ECS Environment

ECS Local Authority

ECS Username

ECS Password
[Update ECS Password](#)

ECS System Status
[Test](#)

[Save](#)

Configuring ECS

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.laweb/service/20170701/OnlineQueryService.svc>

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).

11 / Site Setup

Introduction

Portal administrators can define message templates, customise the text that is displayed on the website, upload a site logo and manage configuration of the website. The **Site Setup** option is selected from the **Administration** menu.

More Information: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* available on the One Publications website (www.onepublications.com).

Managing 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.

To create a new template:

1. Select **Administration | Site Setup | Message Templates** to display the **Message Templates** page.
2. Click the **New Template** button to display the **Create Template** page.

Site Setup

3. Enter a **Template Name**.
4. Enter a template **Subject**.
5. Enter a template **Message**. Formatting buttons are provided above the panel.
6. The message text is displayed in the **Preview**.
7. Click the **Save** button.

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