



Early Years Thirty Hour Entitlement Provider Portal

last updated for the Autumn 2018 release (3.67)

Handbook

CAPITA

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Early Years Thirty Hour Entitlement Provider Portal Handbook/Autumn 2018/2018-11-22

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01 | Introduction to the Thirty Hour Entitlement Portal

What's New in this Release?

For the One Autumn 2018 release (3.67), the following changes have been made:

30 Hour Entitlement Portal

- Additional filter options/display fields are shown to parents when searching for Providers they wish to share their entitlement details with. For more information, see [Sharing Entitlement Details with Providers](#) on page 24.
- New message template called: **Thirty Hours Free Childcare - Citizen Expression of interest** sends Providers an email when a parent shares their 30-hour entitlement details with. For more information, see [30 Hours Configuration](#) on page 23

30 Hours Checks

- **Thirty Hours Childcare** icon now displays the number of notifications from parents that require action from the provider. For more information see [Introduction to the Expiration Dashboard](#) on page 35.
- Multiple records are no longer returned when using **Run a new Check** - in 30 Hours Childcare.

Expiration Dashboard

- The column order on the Expiration Dashboard now shows the **Earliest Date to take up 30 Hrs place** field before eligibility start date.
- A new filter has been added to the Eligibility Filter called: **Eligibility has ended but code is still in grace**. A new configuration option is available to allow LAs to set the default value in the Eligibility Filter and the Number of Days. For more information, see [Displaying Children whose Eligibility is due to Expire](#) on page 35.

Overview

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

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

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

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

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

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

Advice to Local Authorities

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

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

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

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

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

This is updated on the **Service Provision Details** screen in the v4 Client via **Focus | Early Years | Search Service Provision**.

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

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

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

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

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

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

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

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

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

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

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

More Information:

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

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

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

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

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

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

All documents are available on the [One Publications](#) website.

Using this Handbook

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

The first chapter provides an overview of Provider portal administration.

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

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

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

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

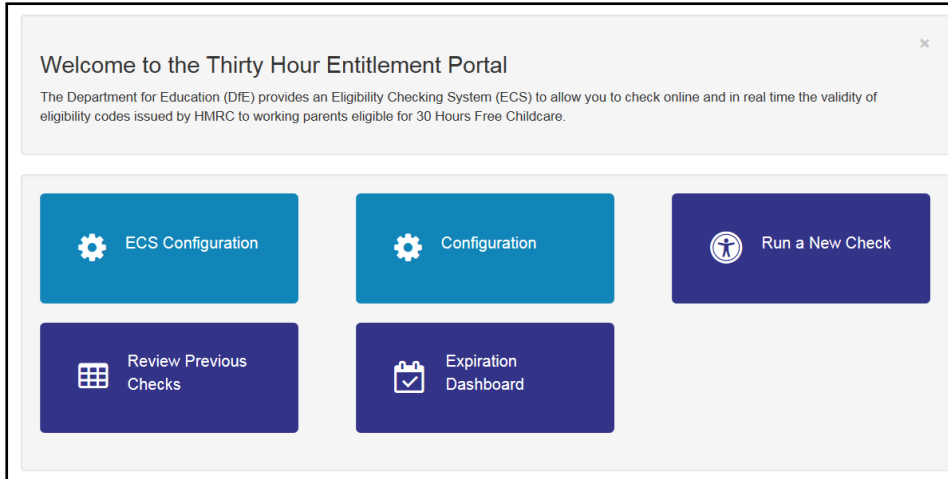
The sixth chapter describes the process in the v4 Client to update the student details record with information about Thirty Hour Entitlement checks that have been run.

Home Page

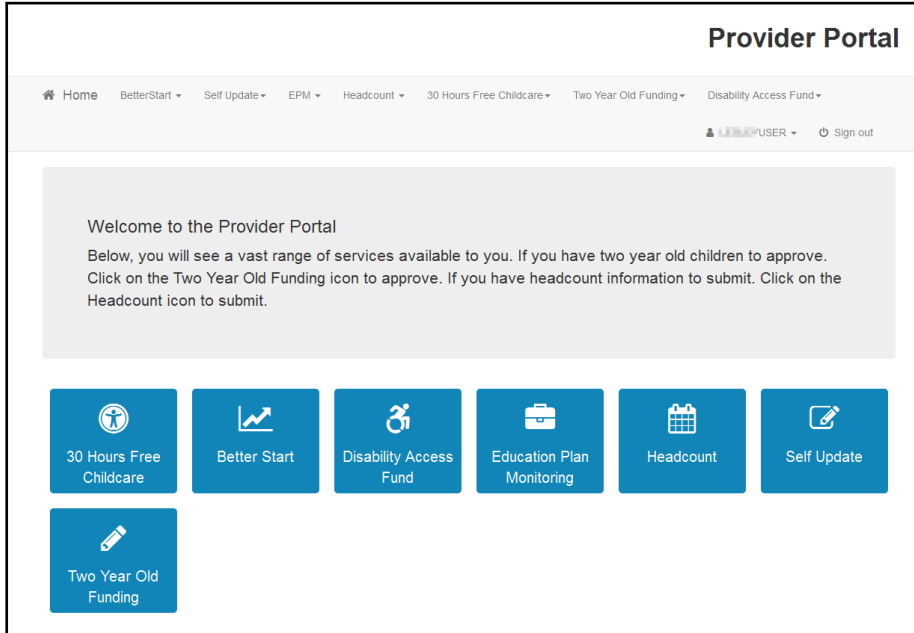
Displaying the Home Page

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

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



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



For more information about assigning permissions, see [Assigning Permissions](#) on page 19.

Portal Administration

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

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

The **30 Hours Free Childcare | Administrator** menu route enables the Local Authority Early Years Admin Officer to perform ECS Configuration. For more information, see [ECS Configuration](#) on page 21.

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.
Disable Two Step Verification	Click the drop-down adjacent to the user name and select Two Step Verification . Select No Two Step Verification from the Preferred method drop-down. Click the Save button. You will be signed out and will need to sign in again.
Sign out	Click the Sign Out button adjacent to the user name.

Configuring the Provider Portal

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

Manage Configurations

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

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

More Information:

For more information regarding portal configuration, refer to the Technical Guide: **Deploying and Configuring the One Provider Self Service Portal for Local Authorities**, which is available on the [One Publications](#) website.

Text Customisation

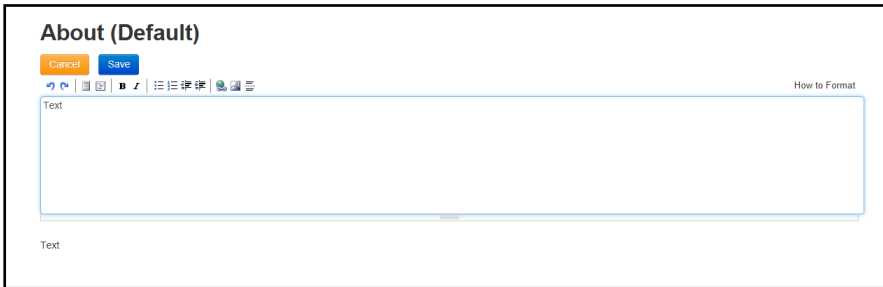
All text, field labels and messages that are displayed on the website can be configured.

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

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

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

- Click the **Add** button.



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

Guidance Notes

Guidance text can be configured to display on specific screens.

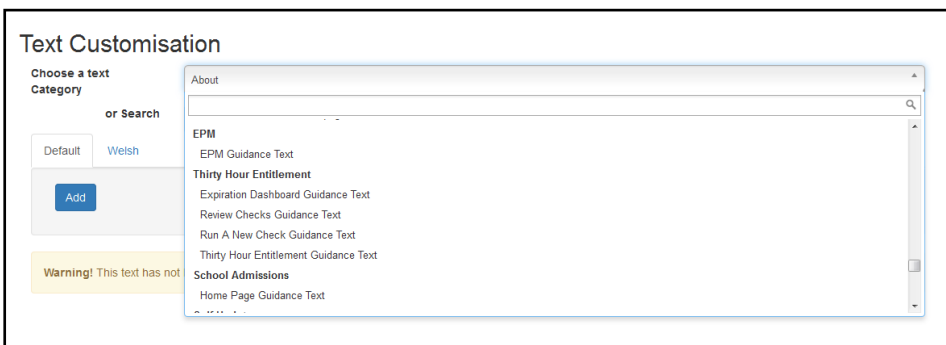
Updating Guidance Notes

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

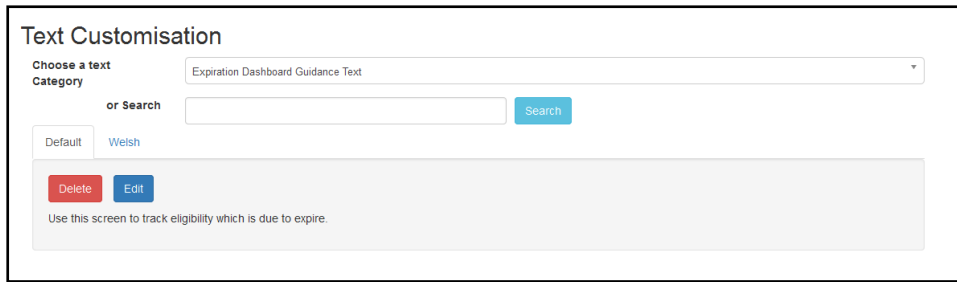
- Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.



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



- Select the required screen.



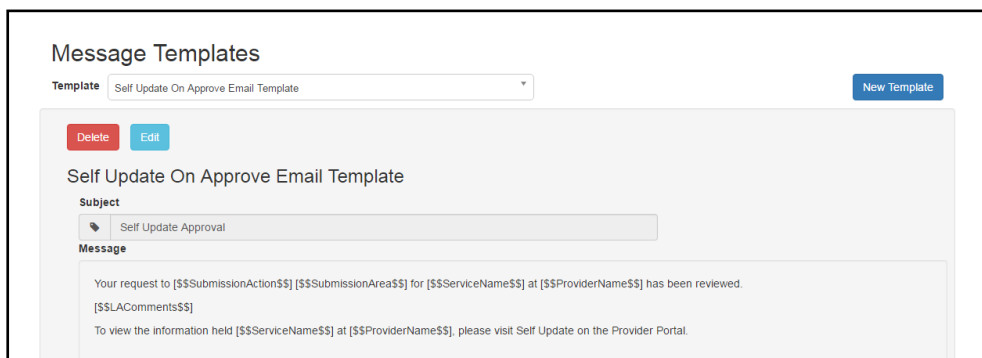
5. Click the **Edit** button.



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

Message Templates

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



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.

Edit Template

Template Name • Self Update On Submit Email Template

Subject • Self Update Submission

Message •
How to Format

A request to [\$\$\$SubmissionAction\$\$\$] [\$\$\$SubmissionArea\$\$\$] has been submitted to [\$\$\$ServiceName\$\$\$] at [\$\$\$ProviderName\$\$\$].

[\$\$ProviderComments\$\$]

Services can be accessed through Self Update.

Cancel Save

Preview

A request to [\$\$\$SubmissionAction\$\$\$] [\$\$\$SubmissionArea\$\$\$] has been submitted to [\$\$\$ServiceName\$\$\$] at [\$\$\$ProviderName\$\$\$].

[\$\$ProviderComments\$\$]

Services can be accessed through Self Update.

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.

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

User creation is a three-stage process.

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

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

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

More Information: *Managing Users in v4* chapter in the *One System – Managing Users, Groups & Permissions* handbook available on the [One Publications](#) website.

Creating a Portal User Account

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

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

Activating a Portal User Account

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

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they 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 the [One Publications](#) website.

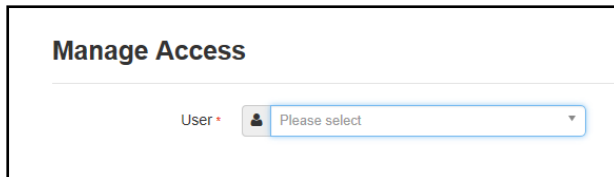
Managing User Access

Granting Access to Providers and Services

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

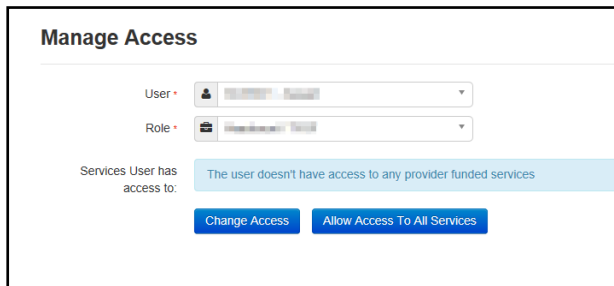
To update access for the selected user:

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



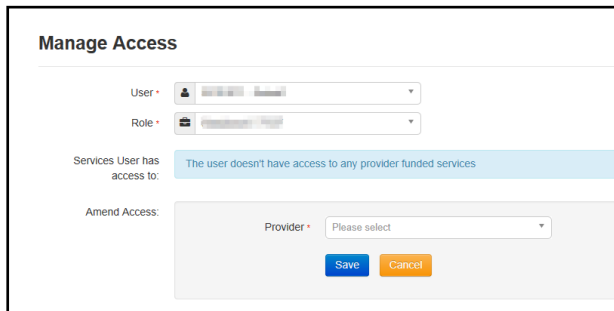
The screenshot shows the 'Manage Access' page with a 'User' dropdown menu set to 'Please select'.

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



The screenshot shows the 'Manage Access' page with a 'User' dropdown menu set to 'Please select' and a 'Role' dropdown menu set to 'Please select'. Below the dropdowns, a message states: 'The user doesn't have access to any provider funded services'. 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.



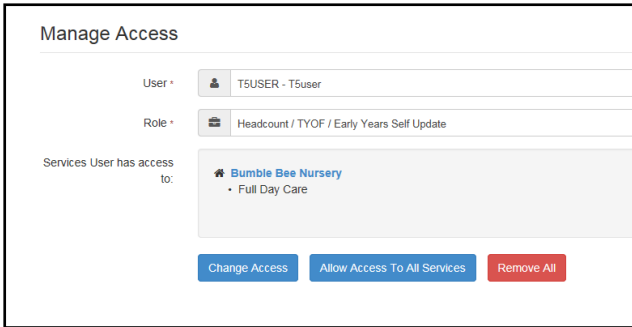
The screenshot shows the 'Manage Access' page with the 'Amend Access' panel open. The 'Provider' dropdown menu is set to 'Please select'. There are two buttons: 'Save' and 'Cancel'.

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:

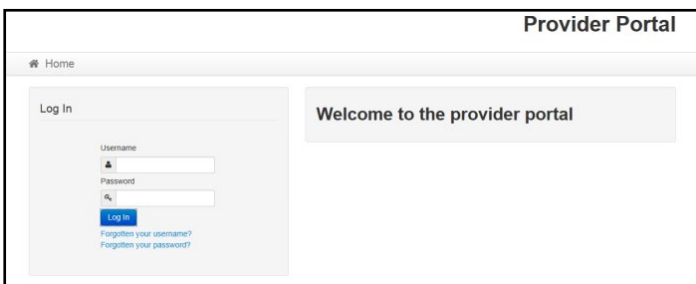
1. Select **Administration | Manage Access** to display the **Manage Access** page.
2. Select a **User** to display a list of services to which they have access.



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

Logging into the Portal

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



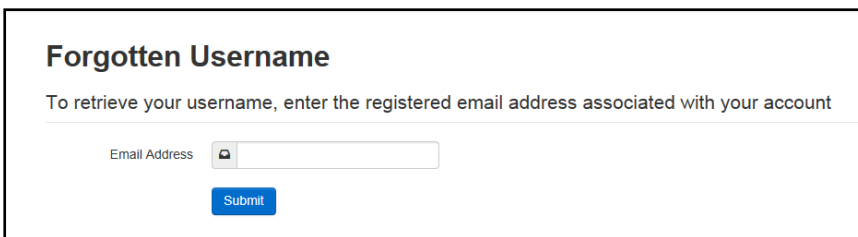
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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.



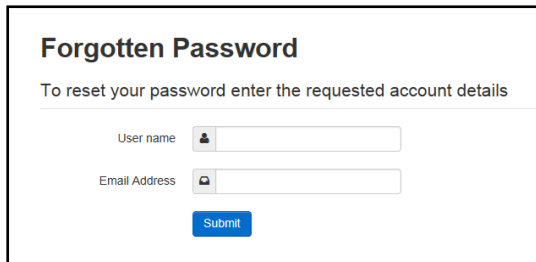
2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

Resetting Your Portal Password

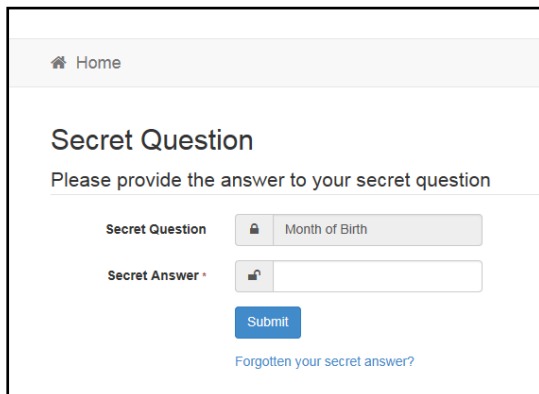
To reset your password:

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

Managing Users



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.

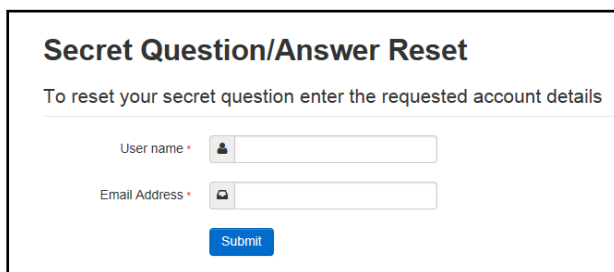


4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

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.

Setting Up Two Step Verification

Introduction

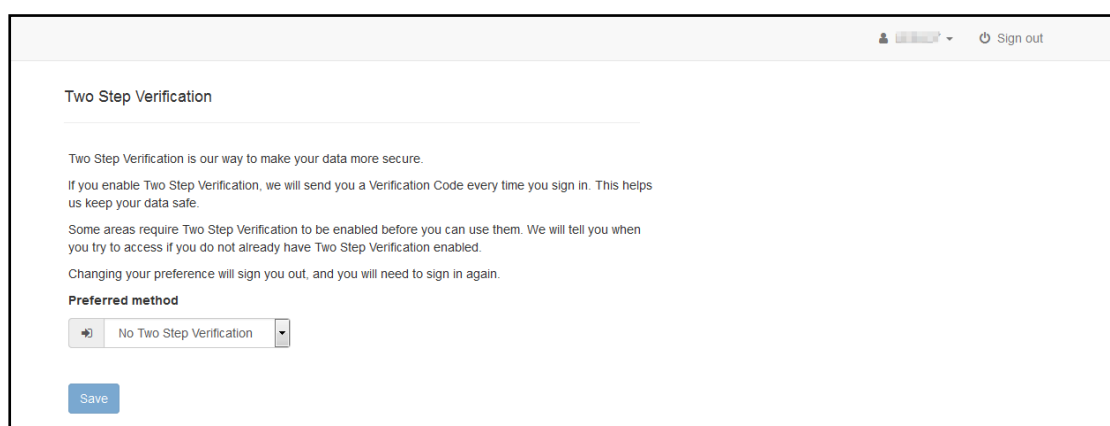
If two step verification is enabled, you will be sent a verification code every time you sign in.

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.



The screenshot shows the 'Two Step Verification' settings page. At the top right, there is a user profile icon and a 'Sign out' button. The main heading is 'Two Step Verification'. Below it, there is a horizontal line. The text explains that Two Step Verification is for security and that a verification code will be sent upon sign-in. It also notes that some areas require it to be enabled and that changing preferences will sign the user out. Under the 'Preferred method' section, a dropdown menu is set to 'No Two Step Verification'. A 'Save' button is located at the bottom left of the form area.

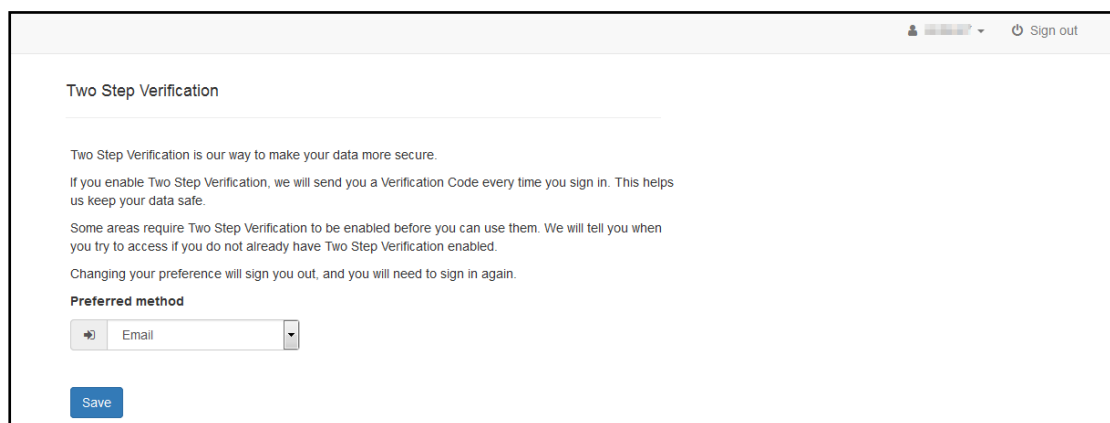
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

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.



This screenshot is identical to the previous one, showing the 'Two Step Verification' settings page. However, the 'Preferred method' dropdown menu is now set to 'Email'. The 'Save' button remains at the bottom left.

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

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

Reviewing Users

Introduction

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

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

Viewing User Details

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

The screenshot shows the 'Review Users' interface. At the top, there is a search bar with a 'Name' input field and a 'Search' button. Below the search bar, it indicates '42 Records Found'. A table lists users with columns for Username, Description, Active status, Registered status, Email, Groups, and Action. The 'TestUser' row shows an inactive status (red cross) and a 'Reset Password, Reset Account' action. The 'VPADM' row shows an active status (green check) and a 'Reset Password' action. At the bottom, there are 'Cancel' and 'Refresh' buttons.

Username	Description	Active	Registered	Email	Groups	Action
TestUser	Admin user for EPM	✓	✗	Testuser14@onetestr	EPADMIN	Reset Password, Reset Account
VPADM	vpadm	✓	✓	testuser10@onetestrn	PP Headcount Adm	Reset Password

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

Updating a User Email Address

To update the user's **Email** address:

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

Resetting a User Password

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

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

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

Resetting a User Account

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

Review Users

Name Search

42 Records Found Page 2 of 5 << Prev 1 2 3 4 5 Next >>

Username	Description	Active	Registered	Email	Groups	Action
EPMUSER	EPM user	✘	✔	Testuser17@onetestr	EPMUSERGROUP	Reset Password, Reset Account

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

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

NOTE: The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see [Resetting a User Password](#) on page 18

Assigning Permissions

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

Permission to Access 30 Hours Free Childcare

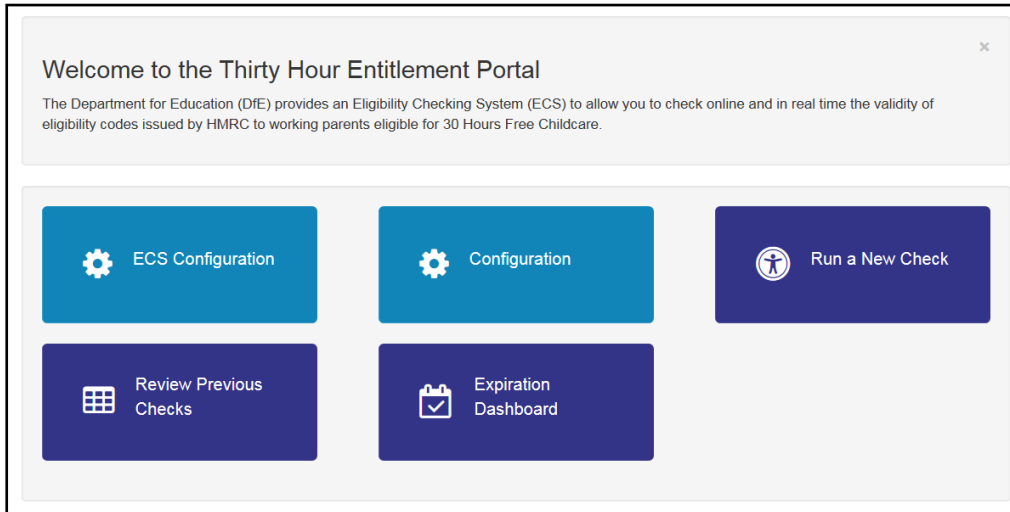
To access 30 Hours, the permission required is **Read-Write-Delete** for the business process **Thirty Hour Entitlement User** under the **Provider Portal** main business process.

Permissions Editor [PP] Save

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				✔
School Admissions - Ranking				✔
School Admissions - Update In Year Offer Statuses				✔
School Admissions - Verification Siblings				✔
School Admissions - 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 | Thirty Hours Administration

ECS Configuration



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

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

Configuring the Link to the ECS

ECS Configuration

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
Live

ECS Local Authority
Capita One

ECS Username
Capita One18675

ECS Password
[Update ECS Password](#)

ECS System Status
[Test](#)

Save

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.lawebsservice/20170701/OnlineQueryService.svc>

ECS Configuration
Configure the link to the DWP Eligibility Checking Service

ECS Settings

ECS Environment: Live

ECS Local Authority: Capita One

ECS Username: Capita One18675

ECS Password: Update ECS Password

ECS System Status: Test

ECS Override Settings

These 'override' settings will normally be empty. They should only be set after guidance from Capita.

ECS Service URI Override: [Text Box]

ECS Service Version Override: [Text Box]

Batch Size (Records): 3

Recheck sleep (Minutes): 5

WCF Open / Close Timeout (Mins): [Text Box]

WCF Send / Receive Timeout (Mins): [Text Box]

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

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

Setting Up Automatic Recheck

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

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

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

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

30 Hours Configuration

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

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

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

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

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

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

Thirty Hours Administration

4. If required, select an **Eligibility** Filter to be set as the default filter.

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

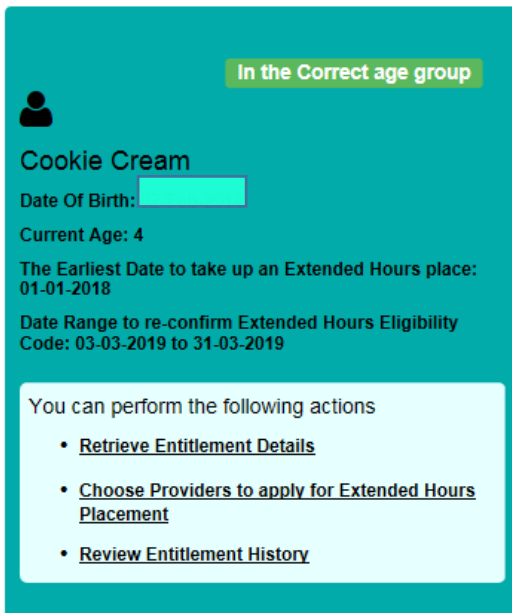
5. If required, enter a default value for the **No. of Days before/after expiration**.
6. If required, enter the number of **Days before Eligibility End Date to start rechecking**.
7. If required, enter the number of **Days after Eligibility End Date to continue rechecking**.
8. Click the **Save** button.

Note: For more information, refer to the *Early Years - Thirty Hour Entitlement Citizen Portal* available on the [One Publications](#) website.

Sharing Entitlement Details with Providers

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

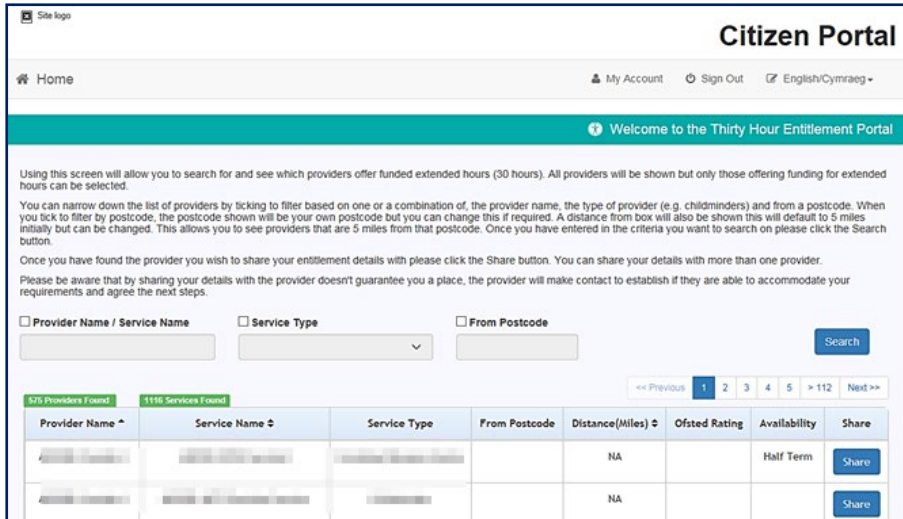
Parent(s) can do this by logging onto Citizen Portal then select the **Choose Providers to apply for Extended Hours Placement** link.



Note: For more information, refer to the *Early Years - Thirty Hour Entitlement Citizen Portal* available on the [One Publications](#) website.

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

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



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

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

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

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

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

Thirty Hours Administration

The screenshot shows the 'Citizen Portal' interface for the 'Thirty Hour Entitlement Portal'. It includes a search bar with filters for 'Provider Name / Service Name', 'Service Type' (set to 'Sessional Daycare'), and 'From Postcode'. A table below the search bar lists providers with columns for 'Provider Name', 'Service Name', 'Service Type', 'From Postcode', 'Distance(Miles)', 'Ofsted Rating', and 'Availability'. At the bottom, there is a 'Selected Providers' section with 'Unshare' buttons for each provider.

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

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

This screenshot shows a close-up of the 'Share' and 'Unshare' buttons. A dropdown menu is open, showing 'Select Provider'. Below it, a 'Selected Providers' section shows 'Green Childcare' with an 'Unshare' button. The provider name 'St Marks' is highlighted in green.

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

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

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

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

Message Templates

Template: Thirty Hours Free Childcare - Citizen Expression of interest New Template

Delete Edit

Thirty Hours Free Childcare - Citizen Expression of interest

Subject
Expression of interest for a 30 hours place for [\$\$ChildForename\$\$] [\$\$ChildSurname\$\$]

Message

This is an expression of interest for a thirty hours entitlement place at your nursery.
 A parent has requested to share the details of their thirty hours extended code with you, including when they are entitled to take up a place.
 You should discuss with the parent of [\$\$ChildForename\$\$] what their funding requirements are and whether they intend to or already share their extended funding with other settings.

The earliest date an extended place will be funded: [\$\$EligibilityStartDate\$\$]
 Eligibility code: [\$\$EligibilityCode\$\$]

Applicant details

Applicant name: [\$\$Forename\$\$] [\$\$Surname\$\$]
 Relationship to child: [\$\$ApplicantRelationship\$\$]
 Contact details: [\$\$ApplicantContactDetails\$\$]

Child details

Childs name: [\$\$ChildForename\$\$] [\$\$ChildSurname\$\$]
 Childs D.o.B: [\$\$ChildDob\$\$]
 Current address: [\$\$ChildsAddress\$\$]

Depending on the outcome of your discussion with the parent, please log into your Provider Portal account, select the 30 Hours Entitlement tile, then Previous Checks to locate the child in the ad-hoc checks section and either select to reject or accept the child at your setting.
 If you have any questions regarding this message, please contact us on 01011 123456 or email contact@thisauthority.com.

Regards
 Early Years and Childcare Team, LA

The Template can now be selected in the **30 Hours Free Childcare Configuration** area if required. For more information, see [30 Hours Configuration](#) on page 23.

04 | Running a Check

Introduction

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

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

Providers and services are assigned to a user via **Administration | Manage Access**. For more information, see [Managing User Access](#) on page 14.

Viewing the Audit Log

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

More Information:

The ERD for the EY30H_CHECK table is available from the [One Publications](#) website

Setting Up the 30 Hour Check Message

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

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

Text Customisation

Choose a text Category: Thirty Hour Entitlement Resources

or Search:

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

Text Customisation

Choose a text Category: Thirty Hour Entitlement Resources

or Search: Label_Result_Message_Eligible

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

4. Click the **Label_Result_Message_Eligible** link to edit the **Text**.

Label_Result_Message_Eligible2

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

Running a Check

- Update the **Text** to the following:

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

- Click the **Save** button.

Running a New Check

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

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

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

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

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

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

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

- On the Provider Portal home page select **30 Hours Free Childcare | Run a New Check** to display the **Run a new check** page.

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

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

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

You are linked to more than one Provider. Please select the provider you are running the checks for from the box below.

Select Provider

Select the required provider from the drop-down list.

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Find a child

Surname, Forename, DOB, NI or Eligibility Code.

Child's Forename: e.g. John
Child's Surname: e.g. Smith
Child's Date of Birth: e.g. 30/11/2012
Parent's NI Number: e.g. NM123456C
Eligibility Code: e.g. 50001005014

Green Childcare

Run Check

- To run a check for a child already associated with the provider:

- a. Enter search criteria in the **Find a child** search to display a list of matching children who are already known to attend your provider.

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Find a child

so 1 matches found for 'so'

Sophie Brown 03/11/2014 (age 3) NI WH987654D Eligibility Code 12345678901

Child's Forename	Child's Surname	Child's Date of Birth	Parent's NI Number	Eligibility Code
Sophie	Brown	03/11/2014	WH987654D	12345678901

Run Check

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

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Find a child

so 1 matches found for 'so'

Sophie Brown 03/11/2014 (age 3) NI WH987654D Eligibility Code 12345678901

Child's Forename	Child's Surname	Child's Date of Birth	Parent's NI Number	Eligibility Code
Sophie	Brown	03/11/2014	WH987654D	12345678901

Run Check

- c. If required, enter the remaining details.

- d. Click the **Run Check** button.

4. To run an ad hoc check:

- a. Enter the **Child's Date of Birth**, **Parent's NI Number** and **Eligibility Code**. If required, enter the **Child's Forename** and **Surname**.

- b. If required, select a provider from the drop-down. The list displays the providers to which you have access.

- c. Click the **Run Check** button.

If successful, the following success message is displayed.

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Find a child

so 1 matches found for 'so'

Sophie Brown 03/11/2014 (age 3) NI WH987654D Eligibility Code 12345678901

Child's Forename	Child's Surname	Child's Date of Birth	Parent's NI Number	Eligibility Code
Sophie	Brown	03/11/2014	WH987654D	12345678901

Run Check

Success!

The earliest start date you can take up Extended Hours funding is 01-Jan-2018 Spring.

This eligibility code is valid from 11-Sep-2017 to 31-Mar-2018, with a grace period to 30-Apr-2018.

The parent/carer must re-confirm their eligibility code from HMRC in order to retain their extended hours eligibility between 03-Mar-2018 and 31-Mar-2018.

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

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

Reviewing Previous Checks

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

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

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

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

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

Checks Run for Ages 2 to 5 Years 6 Months

Use this screen to view checks that you have done.

James | Provider: Green Childcare

Existing Child Checks

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
									<input type="checkbox"/> Show All

Ad-hoc Checks

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	<input checked="" type="checkbox"/>	Accept Placement, Reject Placement Contact Details

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

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

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

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

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

Accepting or Rejecting a Placement

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

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

Checks Run for Ages 2 to 5 Years 6 Months

Use this screen to view checks that you have done.

| Provider: Green Childcare

Existing Child Checks


Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
Simon (30/03/2014)	78945612378	01/02/2018	01/09/2017	31/01/2018	31/03/2018	Eligible	No term available.		<input type="checkbox"/> Show All

Ad-hoc Checks

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	<input checked="" type="checkbox"/>	Accept Placement, Reject Placement Contact Details
David (21/12/2014)	50098765467	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Jan/2018 Spring	<input checked="" type="checkbox"/>	Accept Placement, Reject Placement Contact Details
Deborah (12/08/2014)	50098987654	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	<input checked="" type="checkbox"/>	Accept Placement, Reject Placement Contact Details
Samantha (30/03/2013)	14725836914	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn		

Running a Check

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



Placement for James [redacted]

Please provide the dates from which the child will attend. Once accepted the child's details will be submitted to the local authority who will add them to the system.

Placement Start Date (dd/mm/yyyy): 

Cancel Save

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

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

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

05 | Using the Expiration Dashboard

Introduction to the Expiration Dashboard

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

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



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

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



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

Child	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Earliest Date to take up 30 Hrs place	Notes / Further Action Needed
Simon (30/03/2014)	78945612378	01/09/2017	31/01/2018	31/03/2018	01/02/2018 Eligible Recheck now	No term available.	Update
Samantha (30/03/2013)	14725836914	01/09/2017	10/02/2018	31/03/2018	02/02/2018 Eligible Recheck now	01/09/2017 Autumn	Update
David (21/12/2014)	50098765467	01/09/2017	10/02/2018	31/03/2018	13/02/2018 Eligible Recheck now	No term available.	Update

Displaying Children whose Eligibility is due to Expire

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

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

Using the Expiration Dashboard

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

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

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

Entitlement Expiration Dashboard
Use this screen to track eligibility which is due to expire.

Further Action Needed: Yes ▾ Days: 180 Eligibility Filter: Grace Period Ending in the next 180 days ▾ Search

Provider: Anu Providers ▾

Filter using any keyword

Child	Earliest Date to take up 30 Hrs place	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Notes / Further Action Needed
No records found.							

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

Note: A configuration option is available to allow local authorities to set a default value for The Eligibility Filter and number of Days. For more information see [30 Hours Configuration](#) page23

Entitlement Expiration Dashboard
Use this screen to track eligibility which is due to expire.

Further Action Needed: Any ▾ Days: 180 Eligibility Filter: Eligibility Ending in the next 180 days
Grace Period Ending in the next 180 days
Grace Period Expired in the last 180 days
Eligibility has ended but code is still in grace Search

Provider: Early Years Penetration Provider ▾

Filter using any keyword

Child	Earliest Date to take up 30 Hrs place	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Notes / Further Action Needed
Simon Bailey (12/10/2014)	01/09/2018 Autumn Term	75315985245	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	Update
Sam Boon (12/10/2014)	01/09/2018 Autumn Term	95115995115	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	Update

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

The **Eligible To** date is displayed using the following colours:

Red - eligibility has ended.

Amber - eligibility ends in the next 28 days.

Green - eligibility ends in more than 28 days.

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

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

- b. Click the **OK** button.

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

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

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

06 | Updating Student Details in One v4

Introduction

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

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

Checked on Date	Checked by User	Child Date of Birth Checked	National Insurance Number Checked	Eligible From	Eligible To	Grace Period End	Check Status	Checked for Providers
18/05/2017 13:41:31	System	05/06/2013	AH3612748	01/09/2017	31/03/2018	30/04/2018	Eligible	Test (nil)
16/05/2017 05:46:19	System	05/06/2013	AH3612748	01/01/2018	30/09/2018	31/10/2018	Eligible	ARCEL Provider1, ARCEL Provider2, Anu Providers, Bumble Bee Nursery, Deborah Green Childcare, ... <only first 5 providers listed>
15/05/2017 10:56:38	System	05/06/2013	AB1236488	01/09/2017	30/12/2017	31/12/2017	Eligible	ARCEL Provider1, ARCEL Provider2, Anu Providers, Bumble Bee Nursery, Deborah Green Childcare, ... <only first 5 providers listed>

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

Merging Children Records in One v4

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

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

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

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

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

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