



# Better Start Assessment Provider Portal

last updated for the Spring 2019 release

Handbook

**CAPITA**

## Revision History

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Better Start Assessment Provider Portal Handbook/Spring 2018/26-03-2019

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# 01 | Document Change Control

Date	Release	Description
April 2019	3.68	<p><b>Permissions</b></p> <p>Users with Better Start Administration permission but not General Site Administrator will no longer see the Administration menu by default</p> <p>For more information see Assigning Permissions page 24.</p>
		<p><b>Manage Access - Audit log</b></p> <p>A new database table named <code>audit_log_user_prov_access</code> will record the details of users that have been assigned or removed access to providers/services via Manage Access.</p> <p>For more information see <i>Audit Log</i> page 19</p>
Spring 2018	3.65	<p>When adding a child to an assessment, if the name is longer than the field allows, the child needs to be added by the Local Authority via the v4 Client and a message is displayed. The message can be configured in the Provider portal via <b>Administration   Text Customisation</b>. For more information, see <a href="#">Adding a Child to the Assessment</a> on page 38.</p>



# 02 | Introduction to One Better Start

## 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 the portal administration and setting up of assessment templates, gradesets and age mapping in One v4 PULSE.

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

The third chapter describes the Better Start administration functions performed by the Local Authority Early Years Admin Officer, including creating tasks and sending reminders to providers.

The fourth chapter provides an overview of the processes performed by Early Years providers to view tasks and reminders, submit Early Years assessment data and run reports.

## Overview

The One Better Start Assessment portal uses the One Provider portal. It enables the Local Authority to collect and analyse progress, developmental and attainment data for 0-5 year olds directly from the providers.

Assessment templates can be defined by each local authority to support statutory and local assessment collections. Assessment information recorded by providers is automatically updated and held centrally against children's records in One PULSE. This enables regular progress checks to record whether children are below, in accordance with or above age expectation per assessment statement.

Better Start uses the Portal Back Office in One v4 Online to match incoming student information with existing details 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 Better Start, refer to the Technical Guide: *Setting Up One Better Start for Local Authorities*.

For information regarding creating Better Start reports, refer to the Technical Guide: *Developing Better Start Reports*.

All documents are available on the One Publications website ([www.onepublications.com](http://www.onepublications.com)).



## 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.

### Portal Administration

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

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

The **Better Start | Administrator** menu route enables the Local Authority Early Years Admin Officer to:

- Create tasks so that providers within the LA can complete Better Start assessment templates.
- Compose and send messages to Early Years providers.
- Manage service groups.
- Configure the Better Start application.

### 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.

Function	Description
Home button	Click the <b>Home</b> button to display the <b>Home</b> page
Change Password	Click the drop-down adjacent to the user name and select <b>Change Password</b> . Enter your <b>Current password</b> , <b>New password</b> and <b>Confirm new password</b> . Click the <b>Change password</b> button.
Change Secret Question	Click the drop-down adjacent to the user name and select <b>Change Secret Question</b> . Enter your <b>Current Password</b> , Select a <b>New Secret Question</b> and enter a <b>Secret Answer</b> . Click the <b>Save</b> button. <b>NOTE:</b> 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 <b>Two Step Verification</b> . Select <b>Email</b> from the <b>Preferred method</b> drop-down. Click the <b>Save</b> 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 <b>Two Step Verification</b> . Select <b>No Two Step Verification</b> from the <b>Preferred method</b> drop-down. Click the <b>Save</b> button. You will be signed out and will need to sign in again.
Sign out	Click the <b>Sign Out</b> button adjacent to the user name.

## Customising Text

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 <b>Home</b> page.
	About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Text is displayed when the user clicks the corresponding button at the bottom of each page.
Text Resources		Field labels, user messages and tooltips (text displayed when a user hovers the mouse over a field).
Address	Address Registration	Guidance text displayed for address fields.
Module specific		Guidance text and other text displayed on module-specific pages.

Type	Name	Description
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.
5. Click the **Add** button.

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

## Defining an Assessment Template

Assessment templates used on the Better Start portal are created in the One v4 Client using PULSE.

In PULSE, aspects are used to define any criteria that can be used to measure performance against a student. The columns of a template are specified by selecting aspects.

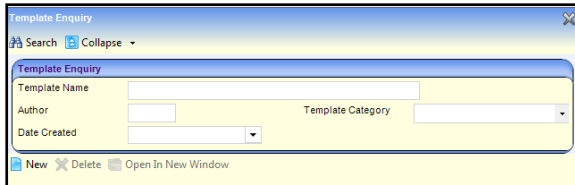
The Local Authority creates Early Years assessment templates and selects which templates are available to be used in the Better Start portal.

**More Information:**

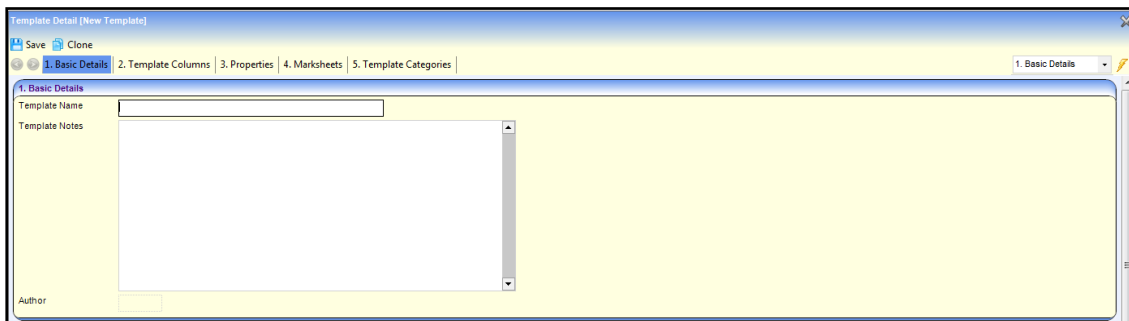
For information regarding using PULSE, refer to the help files included with the v4 Client.

## Adding a New Assessment Template

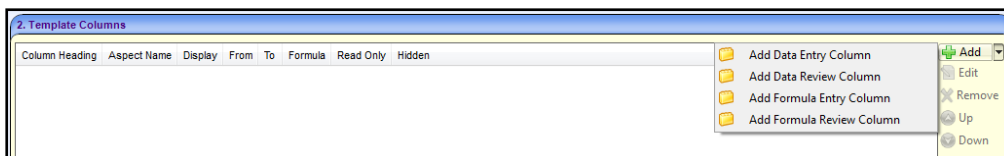
1. In the One v4 Client, select **Focus | Data Management | Templates** to display the **Template Enquiry** page.



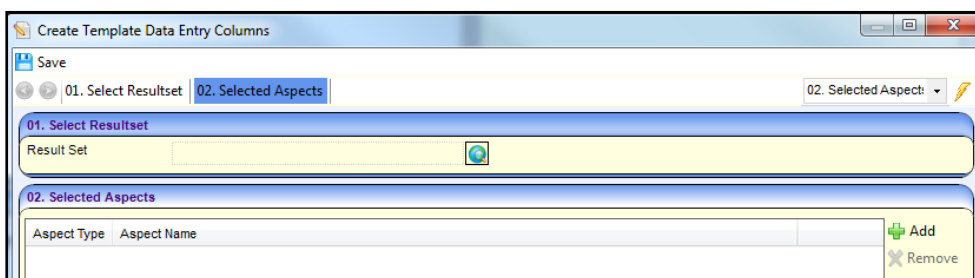
2. Click the **New** button to display the **Template Detail (New Template)** page.



3. Enter a **Template Name**.
4. If required, enter **Template Notes**.
5. Click the **Save** button.
6. Select the **Template Columns** panel.



7. Select **Add Data Entry Column** from the **Add** drop-down to display the **Create Template Data Entry Columns** dialog.

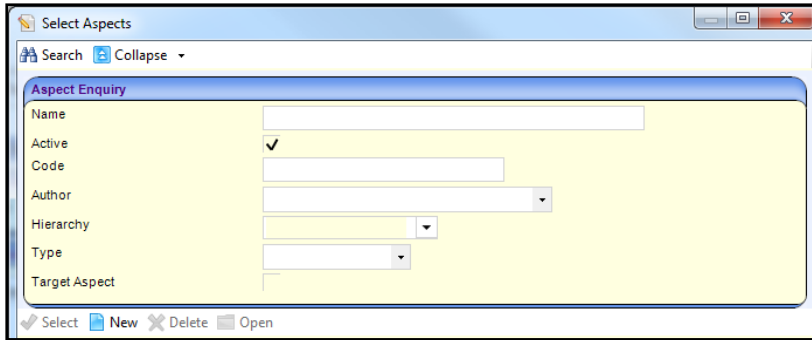


8. If required, select a **Result Set**.

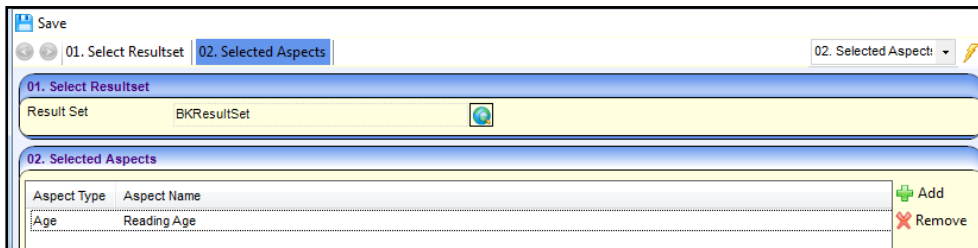
**NOTE:** A result set is used to group a set of aspects and results together.

9. Click the **Add** button on the **Selected Aspects** panel to display the **Aspect Enquiry** dialog.

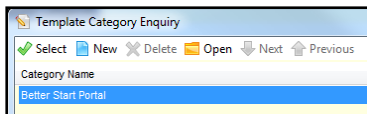
## Introduction to One Better Start



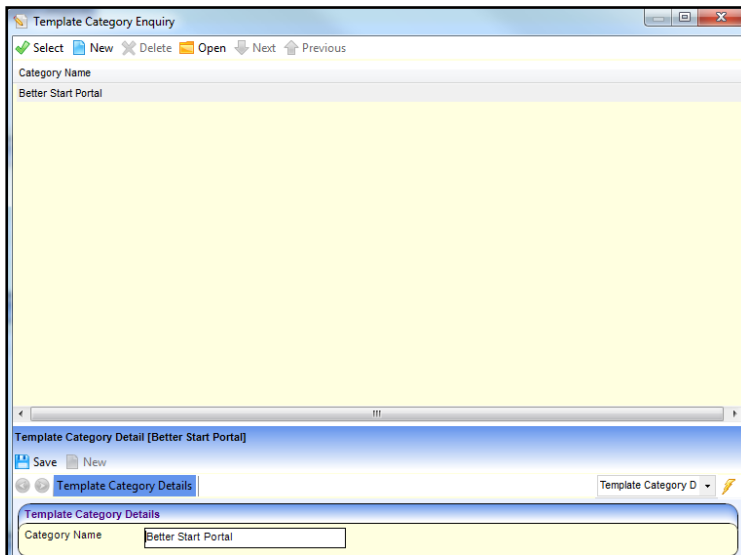
10. Enter search criteria and click the **Search** button.
11. Highlight one or more aspects and click the **Select** button.



12. Click the **Save** button.
13. Select the **Template Categories** panel.
14. Click the **Add** button to display the **Template Category Enquiry** dialog.



15. Highlight the **Better Start Portal** category and click the **Select** button.



16. Click the **Save** button.
17. To save the template, click the **Save** button.

## Updating an Assessment Template

An assessment template that has not already been live on the Better Start portal can be updated.

**NOTES:** Changes should not be made to an assessment template that has been live on the Better Start portal. Local Authorities are advised to clone the required template and make the changes to the cloned version. The cloned template should then have the Better Start category added.

A template that has been live on the portal and is no longer required should have the Better Start category removed. Any data that has already been added using the template can still be imported into One v4 because the PULSE template and aspects still exist.

To update a template:

1. In the One v4 Client, select **Focus | Data Management | Templates** to display the **Template Enquiry** page.
2. Select **Better Start Portal** from the **Template Category** drop-down.
3. Click the **Search** button to display a list of templates defined for **Better Start**.

Template Enquiry

Search Collapse

Template Enquiry

Template Name

Author

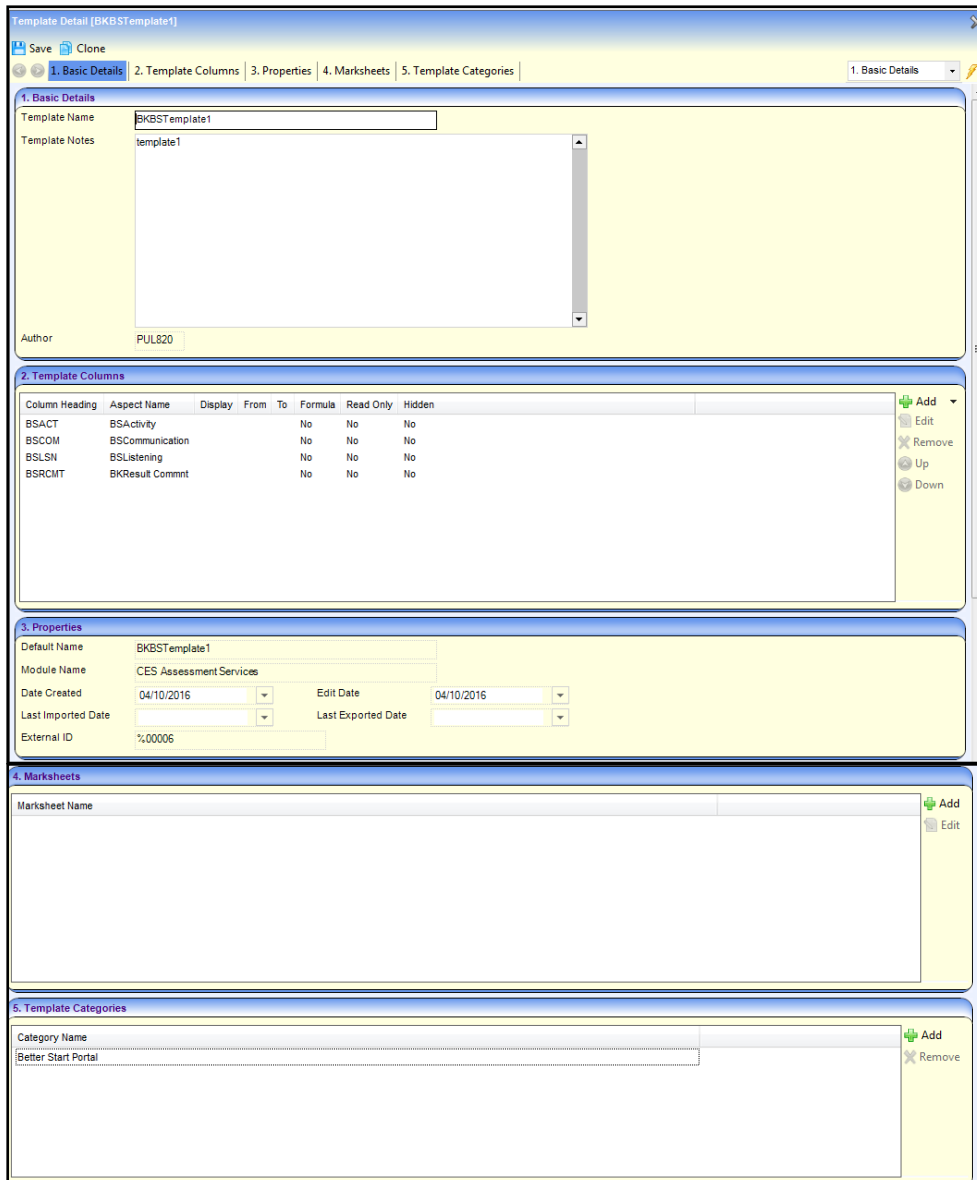
Date Created

Template Category Better Start Portal

New Delete Open In New Window

Template Name	Author	Date Created
BKBSTemplate1	PUL820	04/10/2016
v_temp1	PUL820	04/10/2016
v_temp2	PUL820	04/10/2016
v_template	PUL820	04/10/2016

4. Highlight the required template and click the **Open In New Window** button.



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

## Cloning an Assessment Template

1. In the One v4 Client, select **Focus | Data Management | Templates** to display the **Template Enquiry** page.
2. From the **Template Category** drop-down, select **Better Start Portal**.
3. Click the **Search** button to display a list of templates defined for **Better Start**.

Template Name	Author	Date Created
BKBSTemplate1	PUL820	04/10/2016
v_temp1	PUL820	04/10/2016
v_temp2	PUL820	04/10/2016
v_template	PUL820	04/10/2016

4. Highlight the required template and click the **Open In New Window** button.
5. Click the **Clone** button to display the **Template Detail (New Template)** page with the same details as the cloned template.
6. Enter a **Template Name**.
7. Update the details as required and click the **Save** button.

## Defining Grades and Age Mapping Bands

Grades used in Better Start Assessments are defined in the One v4 Client using PULSE.

The Local Authority can update gradesets and define age mapping bands to enable reports to be produced to identify which children need support in particular areas.

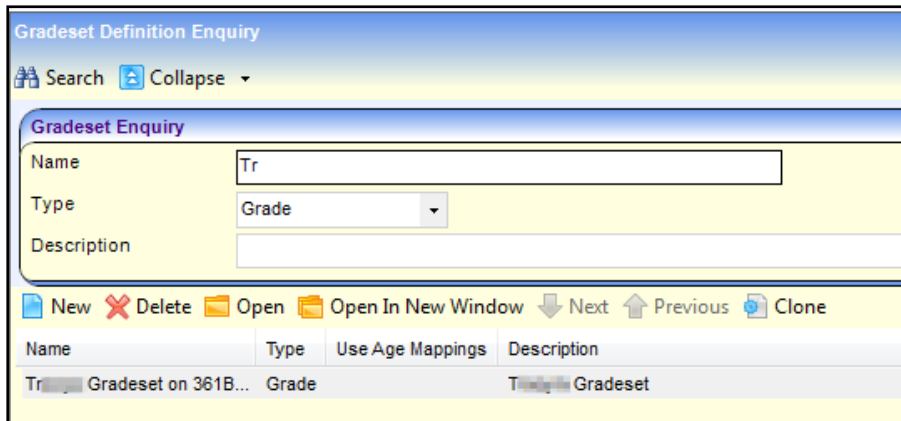
### Adding a Memo for a Grade

A memo can be added to provide a long text description against a grade. This enables providers to produce reports for parents that describe the grade that their child has achieved.

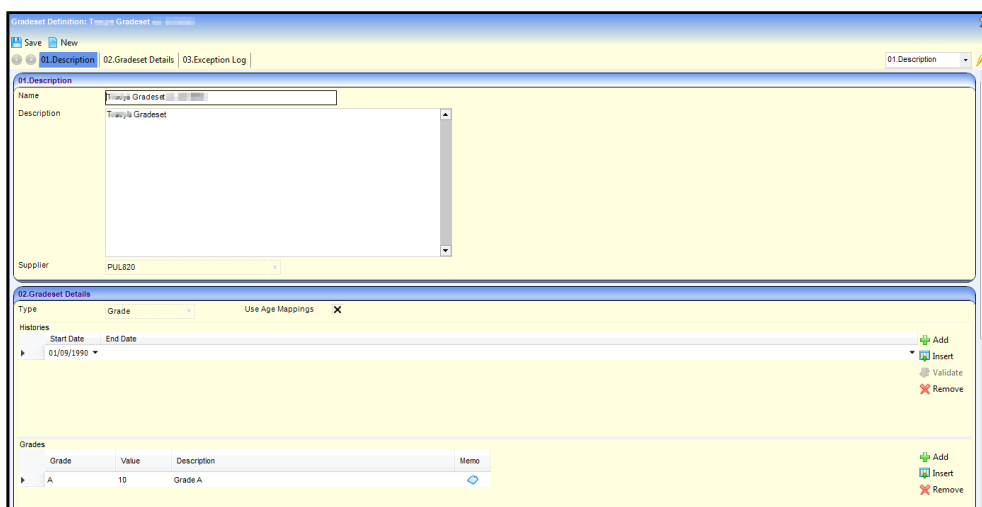
1. In the One v4 Client, select **Focus | Aspects Management | GradeSets** to display the **Gradeset Definition Enquiry** page.

2. Enter the required search criteria and click the **Search** button to display a list of matching gradesets.





3. Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.



4. Click the **Memo** button adjacent to the required grade in the **Gradeset Details** panel to display the **Memo** dialog.
5. Record the required details and click the **OK** button.

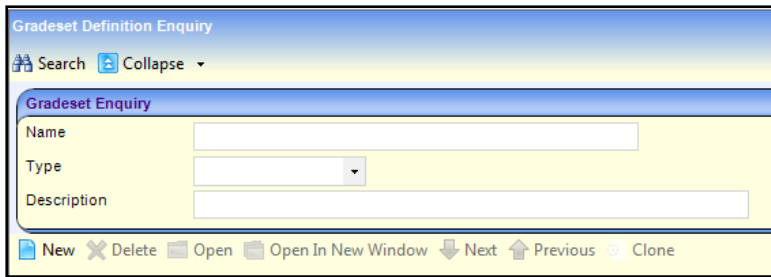
## Mapping Grades to Bands

Children can be placed into bands based on their age at the assessment date when they were given a particular grade. Once children are categorised, reports can be produced to help to identify children who need support in certain areas.

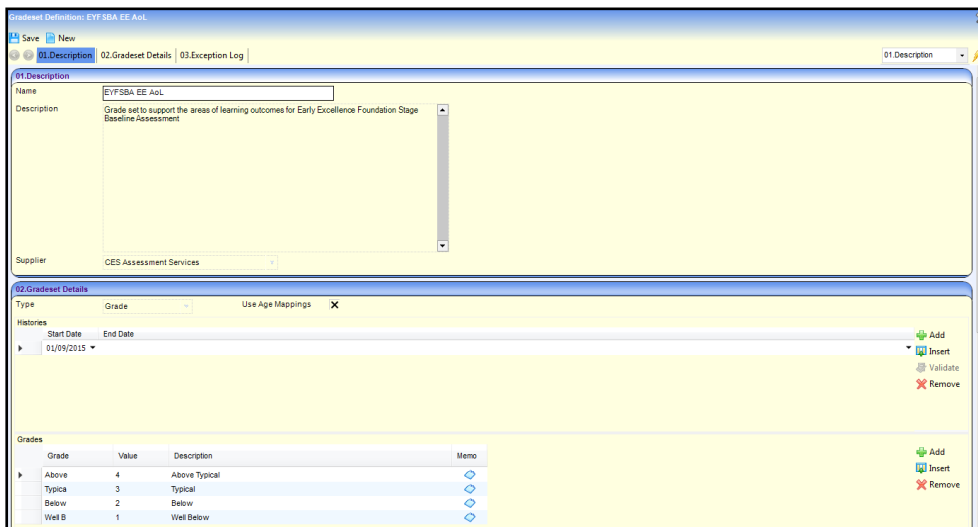
The Local Authority needs to define the age range for each band for a particular grade, by selecting an age mapping code.

### Selecting an Age Mapping Code

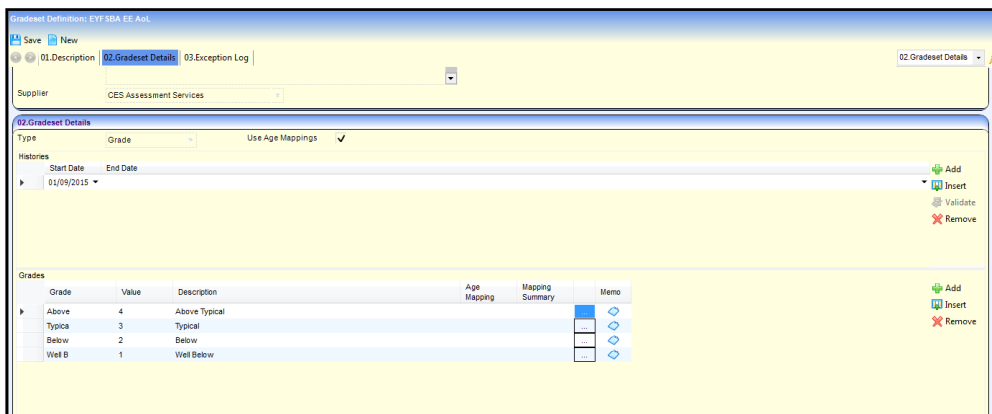
1. In the One v4 Client, select **Focus | Aspects Management | GradeSets** to display the **Gradeset Definition Enquiry** page.



2. Enter the required search criteria and click the **Search** button to display a list of matching gradesets.
3. Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.

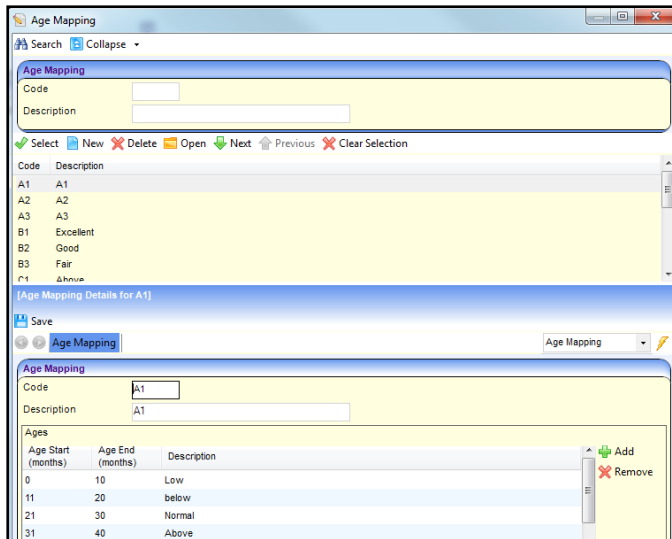


4. Select the **Use Age Mappings** check box to display a tick. The age mapping fields are displayed.



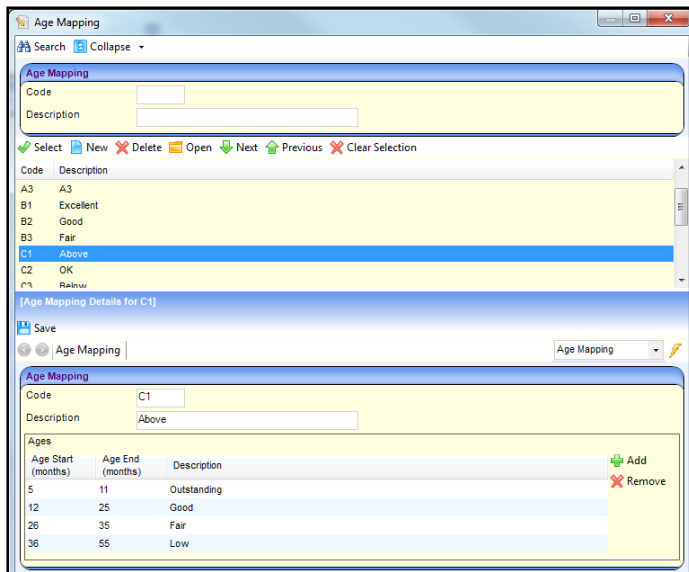
5. Click the button adjacent to the required grade to display the **Age Mapping** dialog.

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6. If required, enter search criteria and click the **Search** button.
7. Highlight the required **Code** and click the **Open** button to display the **Age Mapping Details** for the code.

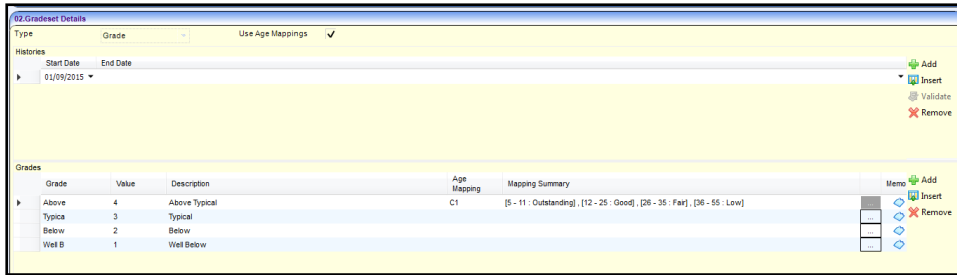
Alternatively, click the **New** button to create a new code. For more information, see [Creating a New Age Mapping Code](#) on page 15.



8. If required, update the age ranges for the code:
  - a. Click the **Add** button to add a new age range or click the **Remove** button to remove an age range.

**NOTE:** Age ranges cannot overlap.

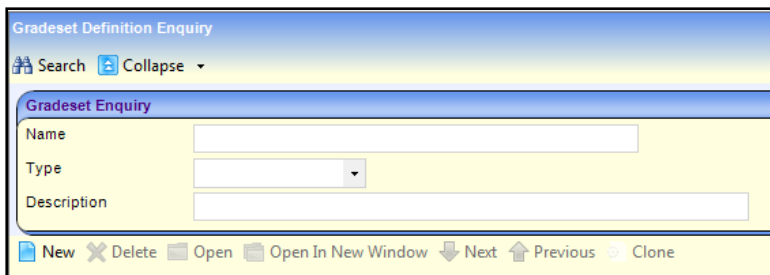
- b. Click the **Save** button.
9. Click the **Select** button.



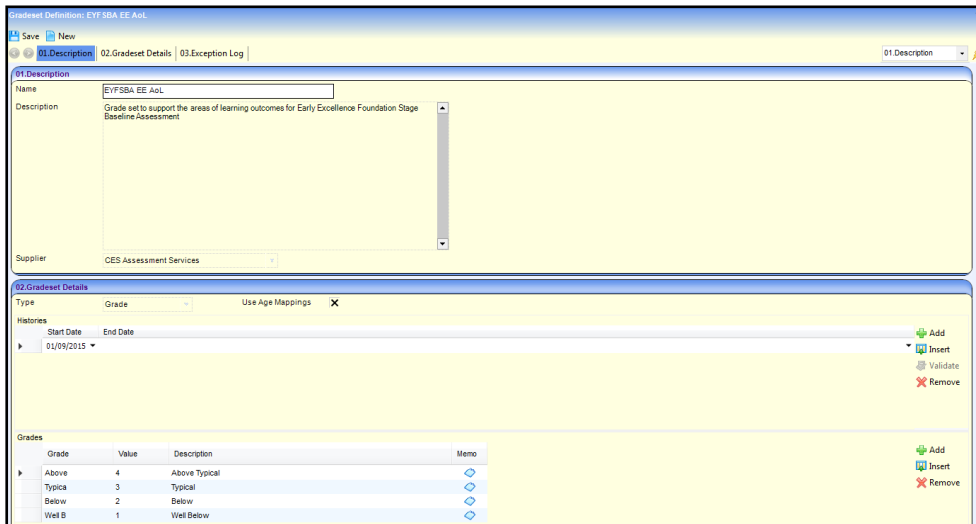
- Click the **Save** button.

## Creating a New Age Mapping Code

- In the One v4 Client, select **Focus | Aspects Management | GradeSets** to display the **Gradeset Definition Enquiry** page.

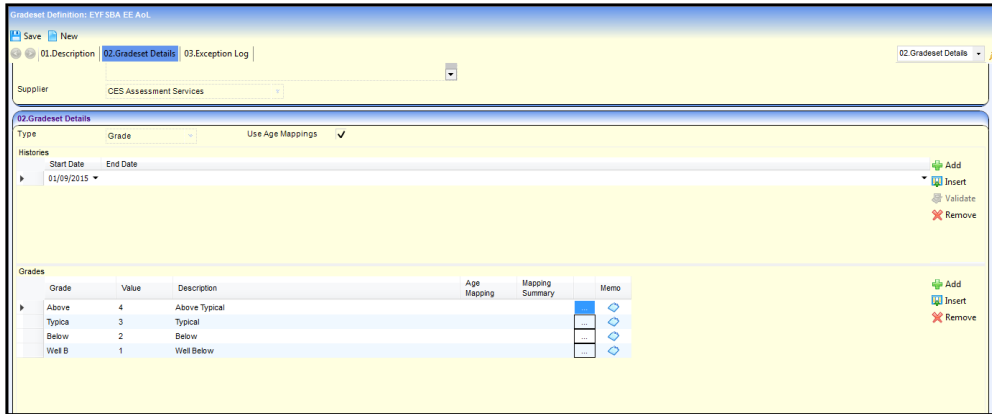


- Enter the required search criteria and click the **Search** button to display a list of matching gradesets.
- Select the required gradeset and click the **Open In New Window** button to display the **Gradeset Definition** page.

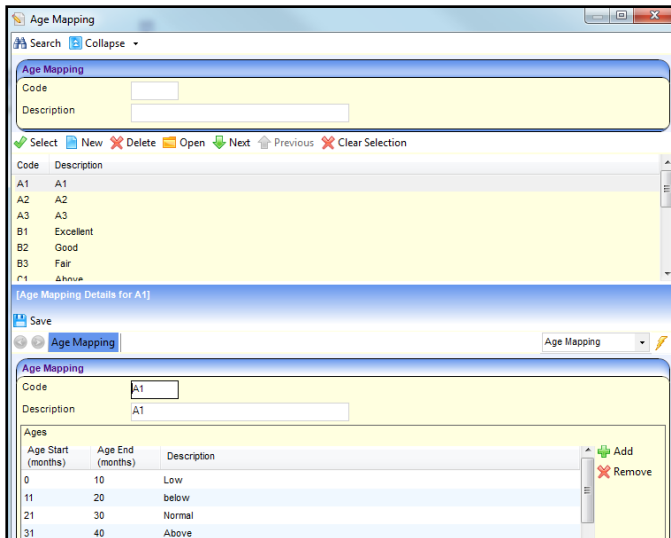


- Select the **Use Age Mappings** check box to display a tick.

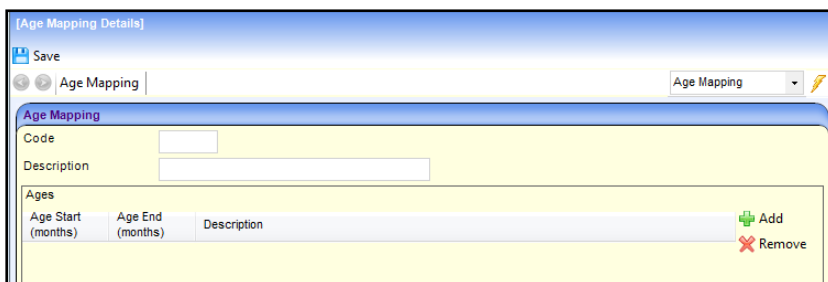
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5. Click the button adjacent to the required grade to display the **Age Mapping Details**.



6. Click the **New** button.



7. Enter a **Code** and **Description**.

8. Enter one or more age ranges with descriptions:

a. Click the **Add** button.

b. Enter an **Age Start (months)** and **Age End (months)** and a **Description**.

**NOTE:** Age ranges cannot overlap.

9. Click the **Save** button.

# 03 | Managing Users

## Introduction

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

In the One Better Start portal there are two types of users, Provider users and Local Authority administrators (Early Years Admin Officers). LA administrators can create tasks, send messages, and manage users. Provider users can enter assessment data for tasks assigned to them or their own ad hoc assessments, read messages sent to them and run reports.

In addition to the above roles, the One Coordinator or EY Admin Officer can create Early Years assessment templates in the v4 Client and the LA Data Officer or EY Admin Officer can add and match children in the Portal Back Office.

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:**

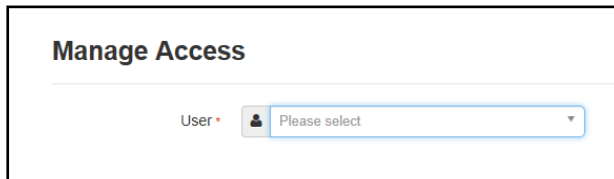
For more information regarding user setup and permissions, refer to the *Technical Guide: Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on [My Account](#).

## Granting Access to Providers and Services

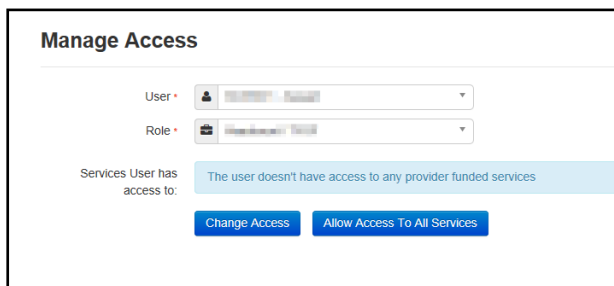
After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

To update access for the selected user:

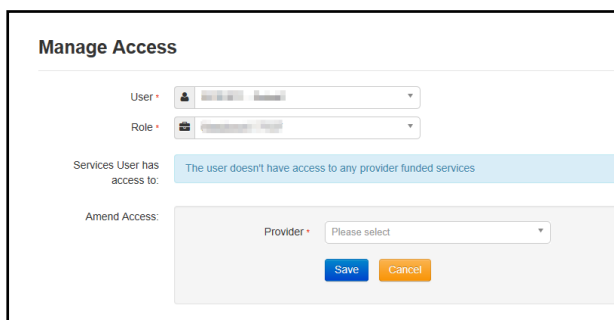
1. Select **Administration | Manage Access** to display the **Manage Access** page.



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



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

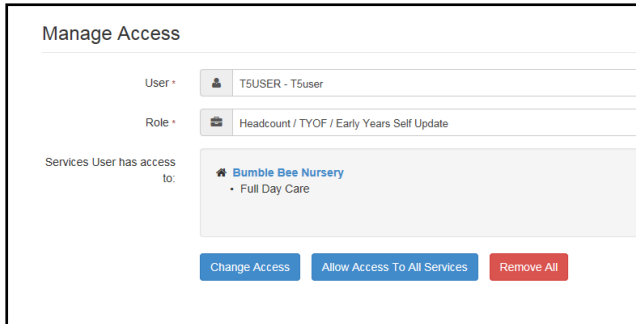


4. Select a **Provider from the drop-down list** to display their services.
5. Select one or more services.
6. Click the **Save** button.

## 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.

## Audit Log

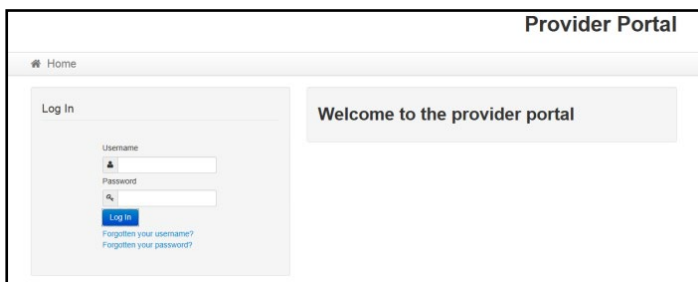
A new table 'audit\_log\_user\_prov\_access' records the details of users that have been assigned or removed access to providers/services via Manage Access. This table provides the information below:

1. User details of the user who has removed / provided access (User\_ID)
2. User details of the user for whom access was remove / provided (Updated\_by)
3. Provider ID of the provider whose access has been removed / provided
4. Service of the provider whose access has been removed / provided
5. Type of role for which access was removed / provided
6. Time and date at which access was removed / provided
7. Whether access was provided or removed for the user (GRANTED\_ACCESS = 0 if access provided and GRANTED\_ACCESS = 1 if access was removed)

**Note:** Details of the user ID can be found out at **security\_users** table

## 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.

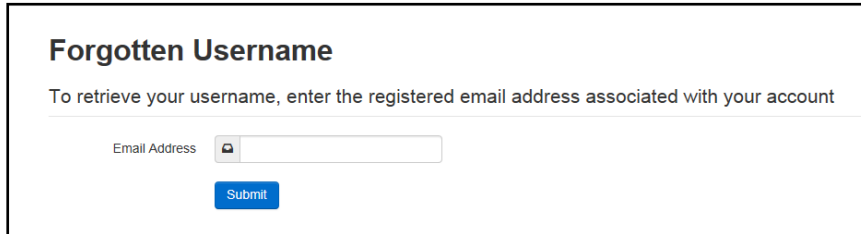
**NOTE:** The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.



## 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.

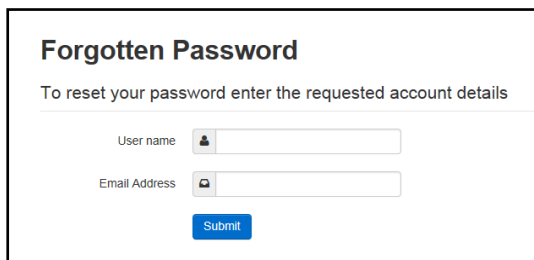


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

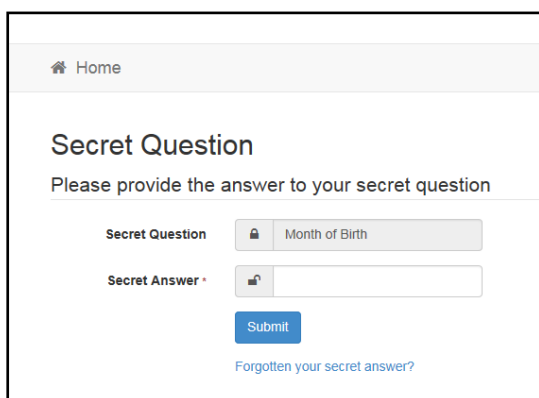
## Resetting Your Portal Password

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.

### Secret Question/Answer Reset

To reset your secret question enter the requested account details

User name \*

Email Address \*

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](http://www.onepublications.com)).

## 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.

### Review Users

Name

Page 5 of 5 << Prev 1 2 3 4 5 Next >>

42 Records Found

Username	Description	Active	Registered	Email	Groups	Action
TestUser	Admin user for EPM	✓	✗	Testuser14@onetestr <input type="button" value="✉"/>	EPADMIN	Reset Password, Reset Account
VPADM	vpadm	✓	✓	testuser10@onetestsn <input type="button" value="✉"/>	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:

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 22

## Setting Up Two Step Verification

### Introduction

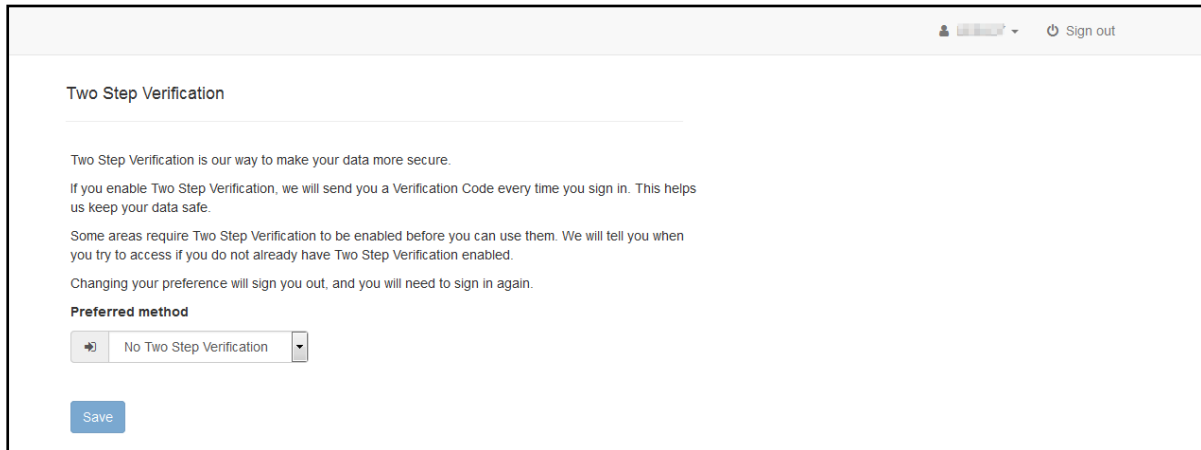
If two step verification is enabled, you will be sent a verification code every time you sign in.

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 explanatory text: '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.' Under the heading 'Preferred method', there is a dropdown menu currently set to 'No Two Step Verification'. A blue 'Save' button is located at the bottom left of the form area.

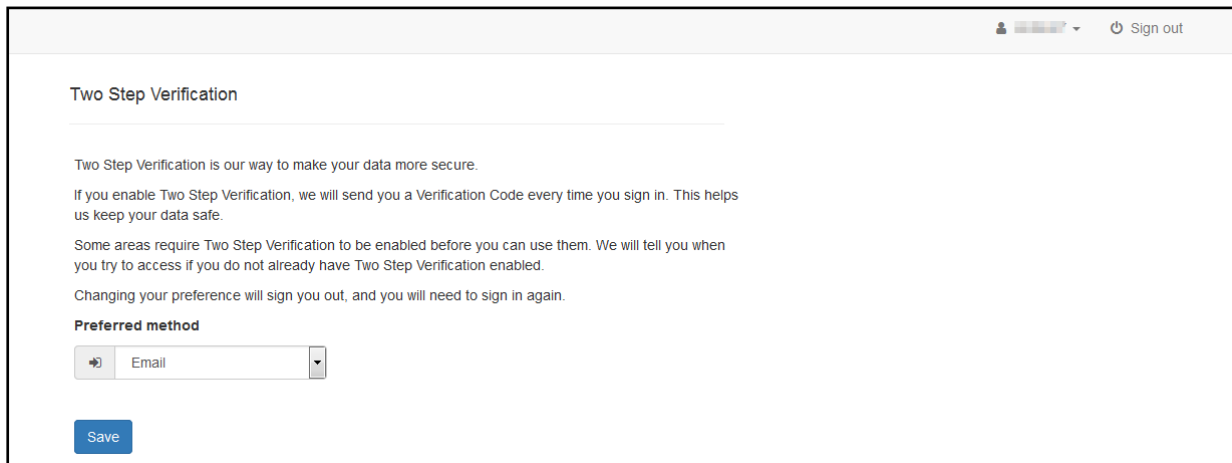
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

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.



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 explanatory text: '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.' Under the heading 'Preferred method', there is a dropdown menu currently set to 'Email'. A blue 'Save' button is located at the bottom left of the form area.

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.

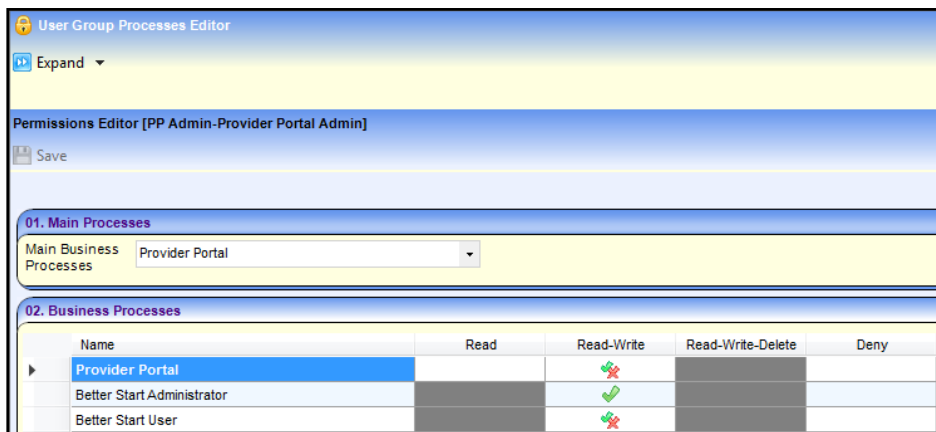
## Assigning Permissions

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

### Permission to Access Better Start

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

- **Better Start Administrator** is for Local Authority users who are creating Better Start assessment tasks for providers to complete and tracking the status of tasks. This permission has been amended so that all Users assigned to this permission but not General Site Administrator will only have access to Better Start Menu and will no longer see the Administration menu by default.
- **Better Start User** is for provider users who are logging on to the Provider portal and submitting Early Years assessment data to the LA.

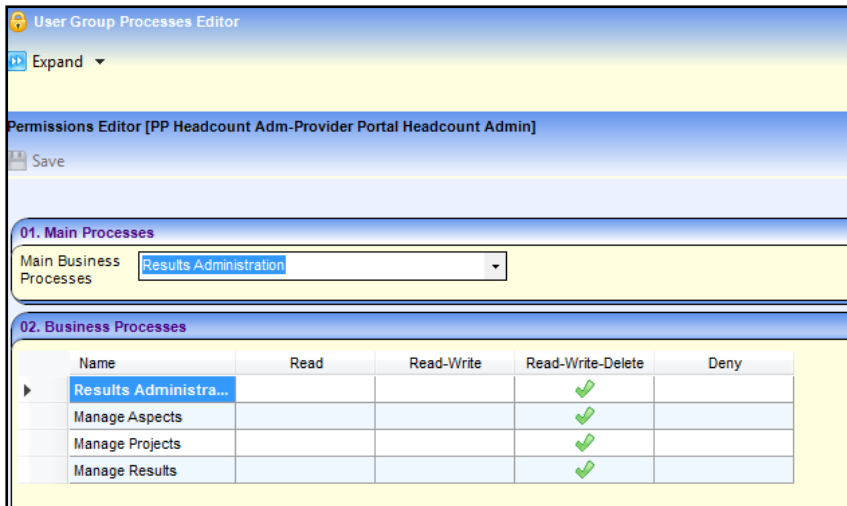


### Permission to Create Templates and Manage Aspects

Permissions are required to create templates in PULSE v4 and manage aspects, including age mapping.

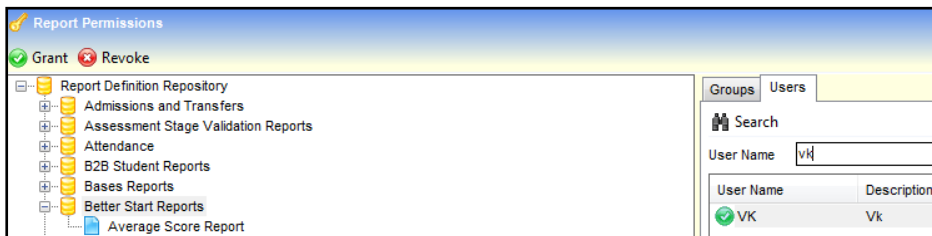
To manage templates, the permission required is **Read-Write-Delete** for the business process **Manage Results** under the **Results Administration** main business process.

To manage aspects, the permission required is **Read-Write-Delete** for the business process **Manage Aspects** under the **Results Administration** main business process.



## Permission to use Better Start Reports

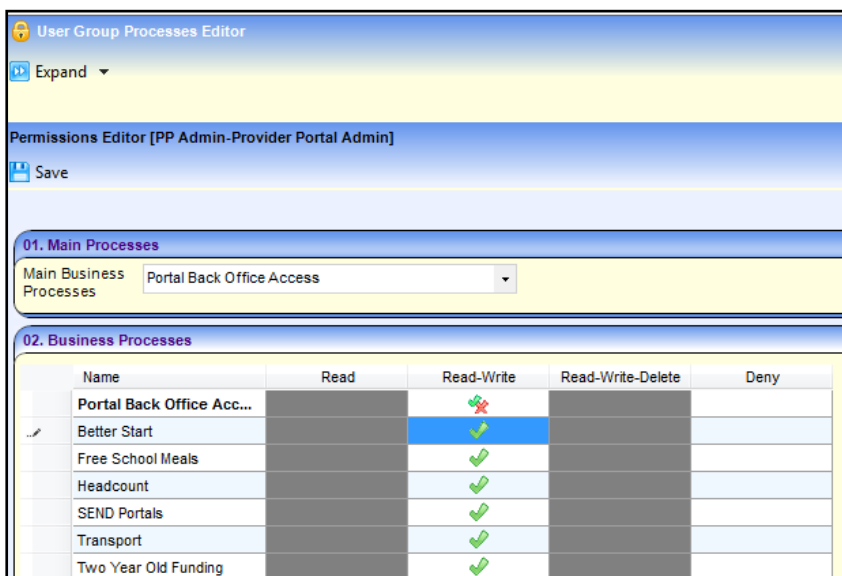
To use the Better Start reports in v4 Client, the user needs to have access to **Better Start Reports** via **Tools | Permissions | Report Permissions**.



## Permission to View Better Start Imports in Portal Back Office

In some Local Authorities, adding and matching Better Start assessments in Portal Back Office is performed by different roles to those who perform it for other submissions e.g. Headcount.

Permissions need to be set up to enable users to see unmatched children and children with data conflicts in the Portal Back Office that have been submitted via a Better Start assessment. The permission required is **Read-Write** for the business process **Better Start** under the **Portal Back Office Access** main business process.

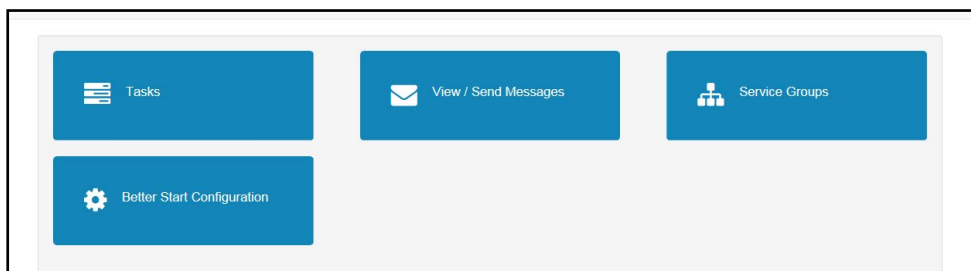




# 04 | Administration

## Better Start Administration Overview

The Better Start administration home page is displayed when the LA administrator clicks the **Better Start** button on the Provider Portal home page.



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

- Tasks
- Messages
- Service Groups
- Configuration.

## Issuing Tasks

### Introduction

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

**NOTES:** Before creating a task, an assessment template must first be created using One v4 PULSE.

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 Better Start for Local Authorities technical guide*.

Tasks are created via **Better Start | 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 with the following message:

This is to inform you that you have a new Early Years assessment task waiting for you on Provider Portal. Please log in to read it.

**NOTE:** The email text can be updated by selecting the **Task Alert Email Body (Better Start)** category via **Administration | Site Setup | Text Customisation**.

## Creating a New Task

Tasks are created for a particular age range of children at a particular date (**Age Calculation Date**).

Tasks are created using the New Task wizard.

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



## Administration

**New Task**

Step 1 Better Start | Step 2 Recipients | Step 3 Issue

Assessment Title \*

Age Range of Children (Months) \*

Attainment Template \*

Age Calculation Date \*

Deadline Date \*

2. Enter an **Assessment Title**.
3. Enter the **Age Range of Children (Months)**.
4. Select an **Attainment Template** for the assessment.
5. Enter an **Age Calculation Date**.
6. Select a **Deadline Date** for the information to be received.
7. Click the **Next** button to display the **Recipients** page.

**New Task**

Step 1 Headcount | Step 2 Recipients | Step 3 Issue

Selected Services for this Task

To

0 Service(s)

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

**Select Services**

Name

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

Search Results	Provider	Service	Funding Type	Service Type
92 Service(s)	<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

Selected Services

0 Service(s)

There are no selected services.

9. 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. For more information, see [Managing Service Groups](#) on page 35.

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

Click the cross button to remove the filter.

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

**Select Services**

Name

Search Results **3 Service(s)**

Provider	Service	Funding Type	Service Type
	Service Group XYZ (3) <input type="button" value="x"/>	Please select	Please select
<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

Selected Services **3 Service(s)**

EYProvider2 - EYService3 EYProvider1 - EYService1 EYProvider - EYService

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

**NOTES:** Services that do not have the B2B import flag selected are highlighted. This does not prevent the task from being created.

Services that do have the XML transfer flag selected are highlighted and this does prevent the task from being created.

**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 - EYService EYProvider1 - EYService1 EYProvider3 - EYService3

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.

## Administration

### New Task

▶ Step 1  
Better Start
▶ Step 2  
Recipients
▶ Step 3  
Issue

Summary

Please confirm that your information is correct

Assessment Title:

Attainment Template:

Age Range of Children (Months):

Age Calculation Date:

Deadline Date:

Selected:

Cancel
Previous
Send

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

### Task Sent

Your task has been created and sent.

OK

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

### Tasks

Create Task
36 Task(s) Service: ALL 
Page 1 of 2 | 1 | 2 | Next >>

Include Adhoc Tasks

Name	Created	Deadline	Issued By	Service Status	Actions
Assessment Test - Better Start Template	29/09/2016 11:05:38	30/09/2016	TADM	3 0 0	Retract
Reg Task 74 5 - Raz template	29/09/2016 07:46:22	31/10/2016	RAZADMIN	2 0 0	Retract
Reg Task 74 3 - Raz template	29/09/2016 07:31:32	29/09/2016	RAZADMIN	0 0 0	Retract

## 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.

- Select **Better Start | Tasks** to display the **Tasks** page listing all tasks that have been issued.

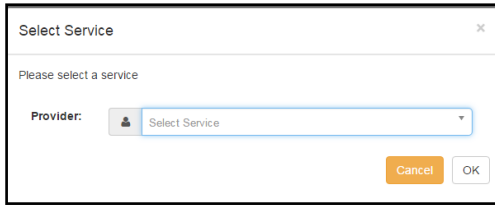
### Tasks

Create Task
40 Task(s) Service: 
Page 1 of 2 | 1 | 2 | Next >>

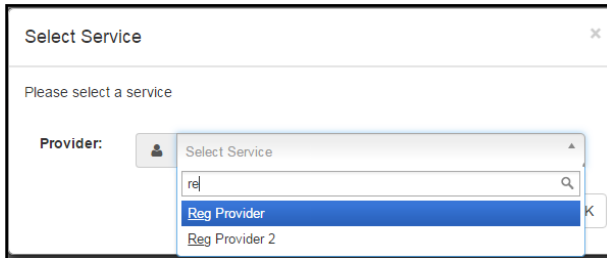
Include Adhoc Tasks

Name	Created	Deadline	Issued By	Service Status	Actions
EYBS-245-Assessment-2 - BKBS Template1	29/09/2016 13:44:47	05/10/2016	BKBSADMIN	1 0 0	Retract
EYBS-245-Assessment1 - BKBS Template1	29/09/2016 13:36:45	08/10/2016	BKBSADMIN	1 0 0	Retract
3.main - v_temp	29/09/2016 11:51:09	30/09/2016	VPADM	1 0 0	Retract
_agemap assessment - _template age map	29/09/2016 11:13:16	30/09/2016	RAZADMIN	1 0 0	Retract
Assessment Test - Better Start Template	29/09/2016 11:05:38	30/09/2016	TADM	3 0 0	Retract

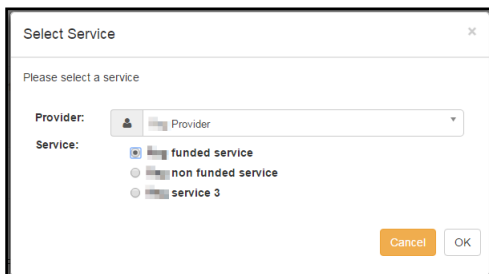
- The **Service Status** displays the number of tasks with each status (**Not Submitted** (red), **In Progress** (yellow) or **Completed** (green)).
- If required, select the **Include AdHoc Tasks** check box to also list ad hoc tasks.
- If required, to display tasks for a specific service:
  - Click the **Service** search button to display the **Select Service** dialog.



- b. Click the **Provider** drop-down. If required, enter one or more characters of the provider name to limit the providers listed.

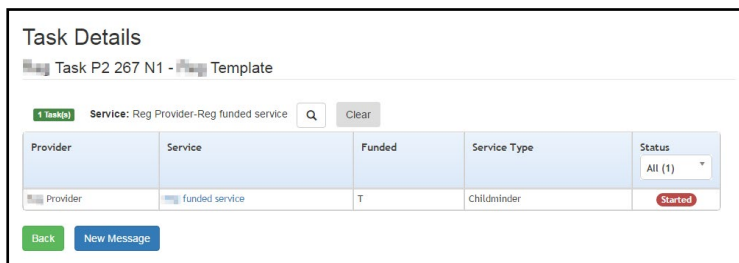


- c. Select the required provider to display a list of services.

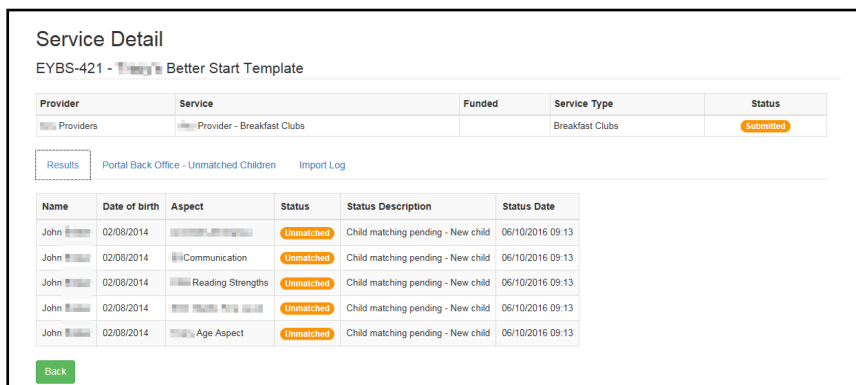


- d. Choose a service and click the **OK** button.

- 5. Click the task **Name** hyperlink to display the **Task Details** page.



- 6. Click the **Service** hyperlink to display the **Service Detail** page with the **Results** tab selected.



- 7. If required, select the **Portal Back Office – Unmatched Children** tab to display a list of unmatched children for the most recent import.

## Administration

**NOTE:** Only the current import unmatched children are listed. Previous submissions for the same task are not displayed even though they are shown in the Portal Back Office.

### Service Detail

EYBS-421 - Better Start Template

Provider	Service	Funded	Service Type	Status
Providers	Provider - Breakfast Clubs		Breakfast Clubs	Submitted

Results [Portal Back Office - Unmatched Children](#) [Import Log](#)

Name	Date of birth	Gender	File Name	File Creation Date/Time	File Import Date/Time
John, [redacted]	02/08/2014 00:00:00	M	820_BETTERSTART_62-68-51_06/10/2016-09-13-47.xml	06/10/2016 09:13:47	06/10/2016 09:13:59

[Back](#)

- If required, select the **Import Log** tab to display the log of import activity.

### Service Detail

EYBS-421 - Better Start Template

Provider	Service	Funded	Service Type	Status
Providers	Provider - Breakfast Clubs		Breakfast Clubs	Submitted

Results [Portal Back Office - Unmatched Children](#) [Import Log](#)

Activity Type	User	Date and Time	Activity Detail
IMPORT	TBSU	06/10/2016 09:13:59	EYBS-421 - Better Start Template / Providers - Provider - Breakfast Clubs / Lakeside Centre 820-
IMPORT	TBSU	06/10/2016 09:13:59	Submission for EYBS_SUBMISSION_ID: 51 created.
IMPORT	TBSU	06/10/2016 09:13:59	Result records status-- not matched (5) from 1 children, record count (5) . There is no B2B Child Import Job.
IMPORT	TBSU	06/10/2016 09:13:59	Submission data creation copied
IMPORT	TBSU	06/10/2016 09:13:59	Reporting columns update finished
IMPORT	TBSU	06/10/2016 09:13:59	Submission data creation completed
IMPORT	TBSU	06/10/2016 09:13:59	Task service status updated to SUBMITTED
IMPORT	TBSU	06/10/2016 09:13:59	Result records status-- not matched (5) from 1 children, record count (5) . B2B Child Import job is queued. (Queueid: 926768a4-899a-41ab-9dbf-5e42c26b3874)

[Back](#)

## 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.

- Select **Better Start | Tasks** to display the **Tasks** page listing all tasks that have been issued.

### Tasks

[Create Task](#)

40 Task(s) Service:

Page 1 of 2 [1](#) [2](#) [Next >>](#)

Include Adhoc Tasks

Name	Created	Deadline	Issued By	Service Status	Actions
EYBS-245-Assessment-2 - BKBS Template1	29/09/2016 13:44:47	05/10/2016	BKBSADMIN	1 0 0	Retract
EYBS-245-Assessment1 - BKBS Template1	29/09/2016 13:36:45	08/10/2016	BKBSADMIN	1 0 0	Retract
3.main - v_temp	29/09/2016 11:51:09	30/09/2016	VPADM	1 0 0	Retract
agemap assessment - template age map	29/09/2016 11:13:16	30/09/2016	RAZADMIN	1 0 0	Retract
Assessment Test - Better Start Template	29/09/2016 11:05:38	30/09/2016	TADM	3 0 0	Retract

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

# 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 **Better Start** menu.

## Viewing Sent Messages

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

Sent Messages

Compose Message    Module Type: Better Start

3 Message(s)

Subject	Date Sent	Sender	Recipient(s)	Message
Placement reference [\$\$PlacementReference\$\$] - Approved	06/10/2016 11:16:50	AdminTest	<a href="#">View Recipients</a>	<a href="#">View Message</a>
Placement reference [\$\$PlacementReference\$\$] - Approved	06/10/2016 11:14:10	AdminTest	<a href="#">View Recipients</a>	<a href="#">View Message</a>
Placement reference [\$\$PlacementReference\$\$] - Approved	04/10/2016 13:53:47	Better Start Admin	<a href="#">View Recipients</a>	<a href="#">View Message</a>

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

Recipients

Back

Subject	Date Sent	Sender
Placement reference [\$\$PlacementReference\$\$] - Approved	06/10/2016 11:16:50	AdminTest

1 Recipient(s)

Provider	Service	Status
Provider	Service_Funded	Unread

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

## Composing a New Message

1. Select **Better Start | Messages** and click the **Compose Message** button to display the **Compose New Message** page.

Compose New Message

To    0 Service(s)

Use Template: Please Select a Template

Attachment: Browse... Clear

Subject

Message:   
 How to Format

Cancel Send

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

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

**NOTE:** Only active services are listed.

4. 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.
5. After selecting all required recipients, click the **Continue** button to display the **Compose New Message** dialog.

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

# Managing Service Groups

## Introduction

Service groups 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 **Better Start | Administrator** menu to display the **Manage Service Groups** page.

Manage Service Groups

0 Group(s)

Name	Service Count
Create Service Group	

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

Manage Service Group

Name

0 Service(s)

Cancel Save

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

Select Services for Group - Service Group 2

Name  Search

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

Provider	Service	Funding Type	Service Type
<input type="checkbox"/> Providers	Provider - Breakfast Clubs	Please select	Please select
<input type="checkbox"/> Providers	Childminder		Breakfast Clubs
<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. X

Cancel Clear Continue

5. If required, to filter the list:




## Administration

- 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

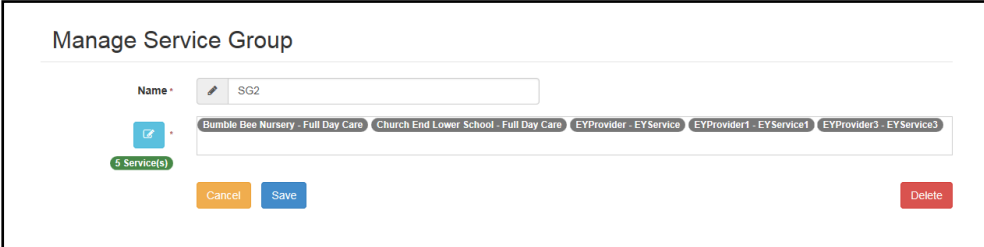
1. Select **Service Groups** from the **Better Start | Administrator** menu to display the **Manage Service Groups** page showing the **Name** and number of services in each current group.



The screenshot shows the 'Manage Service Groups' page. At the top, there is a search bar and a 'Create Service Group' button. Below this is a table with two columns: 'Name' and 'Service Count'. The table contains two rows: one with 'gsdfgdf' and a count of 2, and another with 'SG2' and a count of 5.

Name	Service Count
gsdfgdf	2
SG2	5

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



The screenshot shows the 'Manage Service Group' page for the group 'SG2'. It features a search bar for the group name, a list of services (Bumble Bee Nursery - Full Day Care, Church End Lower School - Full Day Care, EYProvider - EYService, EYProvider1 - EYService1, EYProvider3 - EYService3), and buttons for 'Cancel', 'Save', and 'Delete'. A '5 Service(s)' indicator is visible.

## 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 36.
2. Click the browse button adjacent to the list of services to display the **Select Services for Group** page.

Select Services for Group - Service Group XYZ

Name  Search Page 2 of 10 << Prev 1 2 3 4 5 > 10 Next >>

Search Results 34 Service(s)

Provider	Service	Funding Type	Service Type
<input type="checkbox"/> Provider	Service1	Funded (T)	Childminder
<input type="checkbox"/> Lower School	Maintained Nursery Schools/Cla	Funded (T)	Maintained Nursery Schools/Cla
<input type="checkbox"/> Nursery	Full Day Care	Not Funded (F)	Full Day Care
<input type="checkbox"/> End Lower School	Full Day Care	Funded (T)	Full Day Care
<input type="checkbox"/> dfsdf	dfsdf	Funded (T)	Childminder
<input type="checkbox"/> sss	sss	Funded (T)	Childminder
<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
<input type="checkbox"/> . Louise	Childminder	Not Funded (F)	Childminder

Add All Remove All

Selected Services 3 Service(s)

EYProvider - EYService EYProvider1 - EYService1 EYProvider3 - EYService3

Cancel Clear Continue

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 36.

Manage Service Group

Name

5 Service(s)

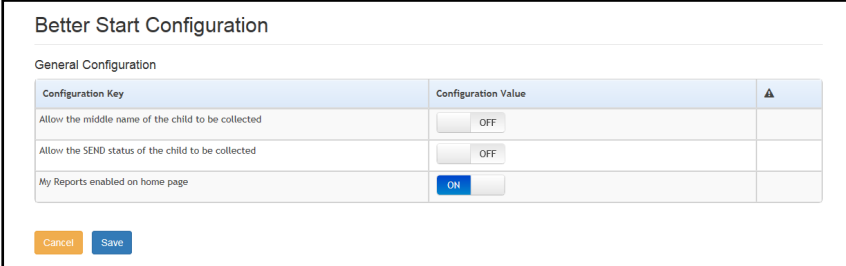
Dumble Bee Nursery - Full Day Care Church End Lower School - Full Day Care EYProvider - EYService EYProvider1 - EYService1 EYProvider3 - EYService3

Cancel Save Delete

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

## Configuration

The **Better Start Configuration** page enables the Local Authority to specify what data to collect via the Provider portal and whether the **My Reports** tab is enabled on the provider's home page.



The screenshot shows the 'Better Start Configuration' page. It features a 'General Configuration' section with a table of configuration keys and values. The table has three columns: 'Configuration Key', 'Configuration Value', and a small triangle icon. The first two rows have 'OFF' values, and the third row has an 'ON' value. Below the table are 'Cancel' and 'Save' buttons.

Configuration Key	Configuration Value	▲
Allow the middle name of the child to be collected	OFF	
Allow the SEND status of the child to be collected	OFF	
My Reports enabled on home page	ON	

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

**NOTES:** If the middle name or SEND status is collected via the portal, they are passed through B2B with the other details of the child.

To update the **Configuration Value**:

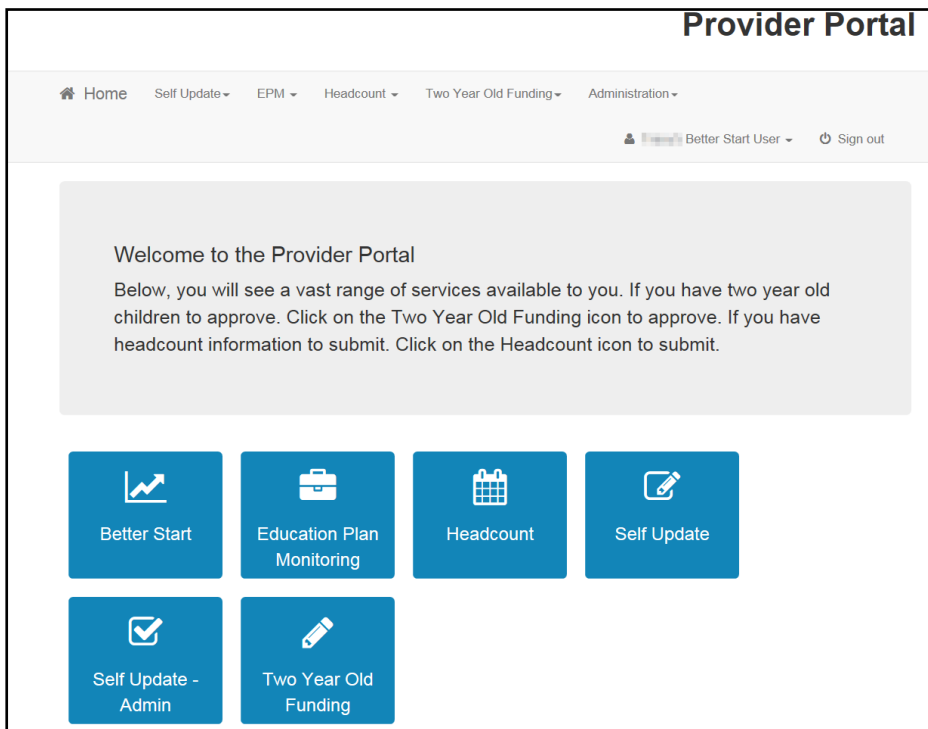
1. Select **Configuration** from the **Better Start | Administrator** menu to display the **Better Start Configuration** page.
2. Click the **Configuration Value** button adjacent to the required **Configuration Key** to change the value.
3. Click the **Save** button.

# 05 | Completing Assessments

## Introduction

This chapter describes the process that the service provider follows to complete tasks assigned to them, entering the required assessment data. The provider enters the results and submits them. The results for matched children are imported straight away.

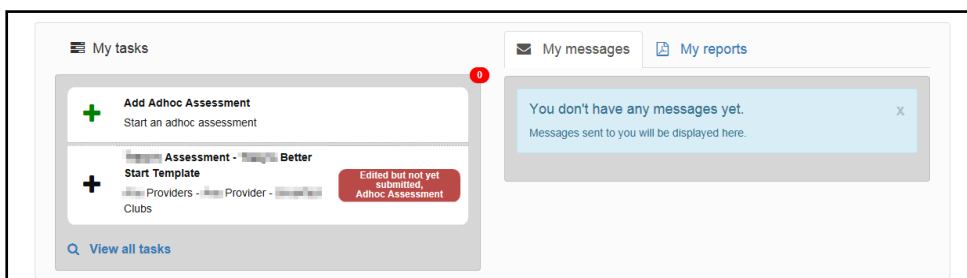
Unmatched children are processed through B2B and displayed in the One v4 Online Portal Back Office. When a child is added or matched in the Portal Back Office, a Better Start import process is scheduled to import the results for child.



*For information regarding using the Portal Back Office, refer to the One Portal Back Office handbook.*

## Viewing Tasks

When the service provider logs onto the Provider Self Service portal and clicks the **Better Start** button, any outstanding tasks assigned to services to which they have access are displayed in the **My tasks** area of their home page.



1. If required, click on the task to display the **Assessment** details.

## Completing Assessments

### + Assessment 2 - Tracy Better Start Template Status: Not Started Adhoc Assessment

Providers / Provider - Breakfast Clubs / Age range 0-72 (Months)

1 Assessment  
Enter Details

2 Children  
Choose Children

3 Results  
Enter Data

4 Submit  
Submit Assessment

Please identify the children for which the assessment will be completed.

Add Child

Forename	Surname	Date of birth	Age (in Months)	User Defined Groups	Include In Assessment
Child	Dddd	01/02/2011	68	<input type="text"/>	<input type="checkbox"/>
Leah	Brownings	24/04/2011	65	<input type="text"/>	<input type="checkbox"/>
Tracy	Brownings	24/04/2011	65	<input type="text"/>	<input type="checkbox"/>

Cancel
Next >

Alternatively, to view all tasks assigned to the provider:

- a. Click the **View all tasks** link to display the **My tasks** page.

#### My tasks

Task

For  Search

Status Current

Enter Criteria X

Please enter your search criteria above then click Search.

- b. If required, enter a partial **Task** name, provider or service name or select a **Status**.
- c. Click the **Search** button to display a list of tasks.

#### My tasks

Displaying all 5 items

Task

For  Search

Status Current

Please enter text which will partially match the task name.

	<b>Adding Child-BS-3 - BSTemplate1</b> BK Provider2 - BK2-FDC	Edited but not yet submitted, Due Today
	<b>Result populate in V4 client -2 - BSTemplate1</b> BK Provider2 - BK2-CM1	Submitted, Due Today
	<b>Result populate in V4 client -2 - BSTemplate1</b> BK Provider2 - BK2-FDC	Submitted, Due Today
	<b>Edit child -1 - BSTemplate1</b> BK Provider2 - BK2-CM1	Submitted, Due 5 days
	<b>Restrict PP data for different provider -2 - BSTemplate1</b> BK Provider2 - BK2-CM1	Edited but not yet submitted, Due 5 days

- d. Select the required task to display the details.

**Adding Child-BS-3 - BStemplate1** Status: Edited but not yet submitted Deadline: Due Today

BK Provider2 / BK2-FDC / Age range 1-60 (Months)

1 Children Choose Children | 2 Results Enter Data | 3 Submit Submit Assessment

Please identify the children for which the assessment will be completed.

Add Child

Forename	Surname	Date of birth	Age (in Months)	User Defined Groups	Include In Assessment	Toggle
Aachild1	Test	30/10/2014	23	BS1	<input type="checkbox"/>	
Bbchild1	Test	13/11/2014	22	BBGP1	<input type="checkbox"/>	
Bbchild2	Test	02/01/2015	20		<input type="checkbox"/>	
Mkchild1	Test	15/06/2014	27	BBGP1	<input type="checkbox"/>	
Mkchild2	Test	27/08/2015	13	BBGP2	<input type="checkbox"/>	
Mkchild3	Test	12/11/2013	34		<input checked="" type="checkbox"/>	

## Completing an Assessment Task

To complete an assessment task created by the Local Authority, the provider must choose the children to be included in the task and then enter their results.

1. Click on a task to display the **Children** grid. For more information on opening an assessment task, see [Viewing Tasks](#) on page 39.

**Assessment - Better Start Template** Status: Edited but not yet submitted Adhoc Assessment

Providers / Provider - / Age range 0-72 (Months)

1 Assessment Enter Details | 2 Children Choose Children | 3 Results Enter Data | 4 Submit Submit Assessment

Please identify the children for which the assessment will be completed.

Add Child

Forename	Surname	Date of birth	Age (in Months)	User Defined Groups	Include In Assessment	Toggle
Child	Dddd	01/02/2011	68		<input checked="" type="checkbox"/>	
		04/05/2014	29		<input checked="" type="checkbox"/>	
		24/04/2011	65		<input checked="" type="checkbox"/>	
		24/04/2011	65		<input checked="" type="checkbox"/>	

Cancel Next

**NOTES:** The grid is pre-populated with information from One Early Years relating to children associated with the service. Additional children can be added and children can be deselected if they are not to be included in the assessment.

2. If required, enter two or more characters of **Surname** to filter the list.
3. If required, click the **Add Child** button to display the **Add Child** dialog and add a child to the list. For more information, see [Adding a Child to the Assessment](#) on page 42.
4. If required, enter a **User Defined Group** against a child. This can then be used to group children for reporting purposes.
5. If required, deselect the **Include In Assessment** check box against one or more children. Alternatively, click the **Toggle** button to select or deselect all of the displayed children.
6. Click the **Next** button to display the **Results** grid. If a provider has entered data in the past for any of the aspects on the assessment template, the grid is pre-populated with these results.

## Completing Assessments

7. If required, click on the drop-down on a column heading to display the options. You can sort by the column, hide it or pin it to the left or right of the grid.
8. If required, filter the grid by entering one or more characters in the filter box beneath a column heading.
9. Enter the required results data in the grid.
10. Click the **Save** button.
11. If required, click the **Download** button to export the assessment grid and save it in Microsoft Excel format.
12. Click the **Next** button to display the **Submission Declaration**.

13. Click the **Confirm** button.

## Adding a Child to the Assessment

A child that is not listed on the **Children** panel but is included in the assessment can be added.

**NOTE:** When a new child is added through the Better Start portal, they are matched or added in the Portal Back Office. If their school history overlaps the term end date, they are displayed on the headcount grid in Early Years Headcount. These children may or may not be funded. To enable providers to identify children who are not funded, changes have been made in the Early Years Headcount portal.

### More Information:

For information regarding Early Years Headcount, refer to the *One Early Years Headcount Provider Portal* handbook available on the One Publications website ([www.onepublications.com](http://www.onepublications.com)).

1. Display the required assessment details and click the **Add Child** button. For more information on opening an assessment task, see [Viewing Tasks](#) on page 39.

**Add Child**

Please enter the child's forename and surname

Forename

Surname

2. Enter a **Forename** and **Surname** and click the **Next** button.

**NOTE:** 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**. For more information, see [Customising Text](#) on page 5.

If the child already exists on another assessment or headcount, the **Child Found** page is displayed. To add the child to the assessment, click the **Select** button.

Alternatively, the **Add Child** page is displayed to add the remaining child details.

**Add Child**

Forename   Child's legal forename

Middle Name

Surname

Gender  Male  Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

SEND Status

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

**\* Required field**

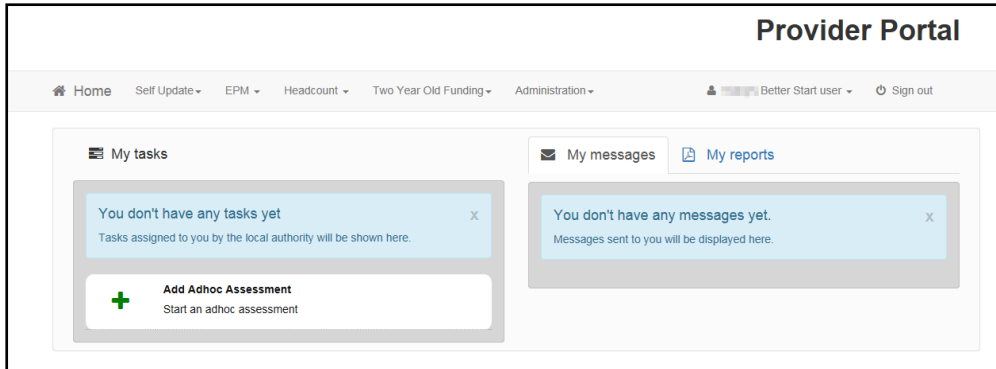
**NOTE:** **Middle Name** and **SEND Status** are only displayed if the Local Authority administrator has selected this option via the **Better Start Configuration** page. For more information, see [Configuration](#) on page 38.

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



## Adding an Ad hoc Assessment

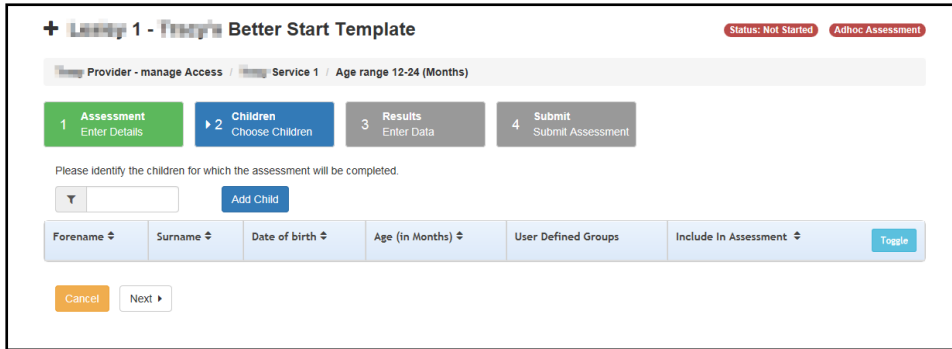
An ad hoc assessment can be added for any of the providers to which you are linked.



1. Click the **Add Adhoc Assessment** button to display the **Create a New Adhoc Assessment** page.

The screenshot shows the 'Create A New Adhoc Assessment' form. At the top, there is a progress bar with four steps: 1. Assessment (Enter Details), 2. Children (Choose Children), 3. Results (Enter Data), and 4. Submit (Submit Assessment). The first step is active. Below the progress bar, there are several input fields: 'Assessment Title' (text input), 'Age Range of Children (Months)' (two text inputs), 'Attainment Template' (drop-down menu with 'Please select' as the current selection), and 'Age Calculation Date' (calendar icon and text input). Below these fields, there is a section titled 'Please identify the service to which the assessment will be linked.' This section contains a 'Provider' drop-down menu with 'Anu Providers' selected, and a 'Service' list with radio buttons. The first service, 'Anu Provider - Breakfast Clubs', is selected. Other services listed are 'Childminder' (four times) and 'Anu service'. At the bottom of the form, there are two buttons: 'Cancel' and 'Next'.

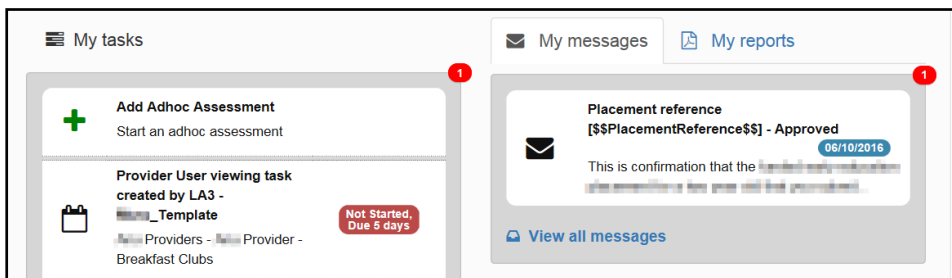
2. Enter an **Assessment Title**.
3. Enter an **Age range of Children (Months)**.
4. Select an **Attainment Template** from the drop-down.
5. Select an **Age Calculation Date**.
6. Select a **Provider** from the drop-down list of providers.
7. Select a **Service**.
8. Click the **Next** button to display the **Children** grid.



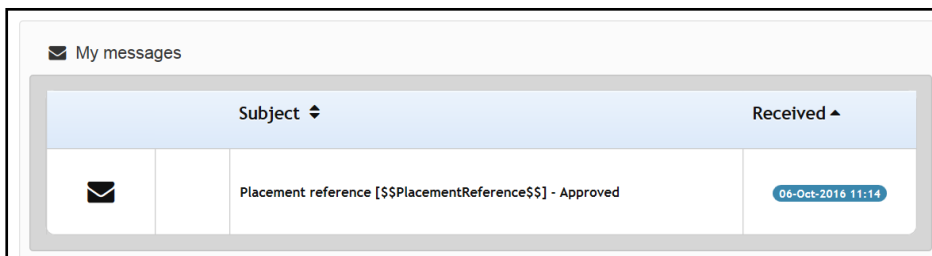
9. Click the **Add Child** button to display the **Add Child** dialog and add the required children. For more information, see [Adding a Child to the Assessment](#) on page 42.
10. Click the **Next** button to display the **Results** grid.

## Viewing Messages

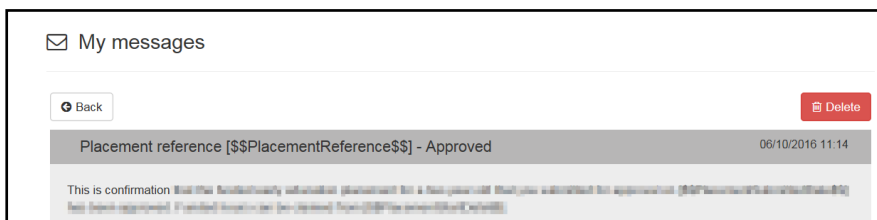
The **My Messages** panel is displayed on the provider's **Home** page with a list of messages sent from the Local Authority administrator.



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



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



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

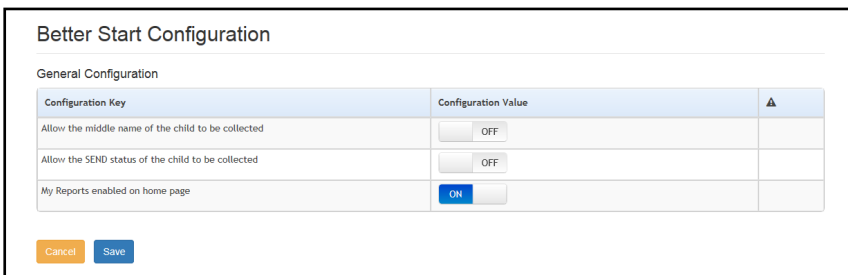
## My Reports

### Introduction

Providers can run new reports and view completed reports for children that are currently attending or have previously attended one of their services.

In addition to the reports provided, the Local Authority can place their own custom Crystal Reports in the report repository. These reports are then available for providers to access from the **My reports** panel.

The **My reports** panel is only enabled on the provider's home page if the **Configuration Value** is set to **On** via the **Better Start Configuration** page, as displayed in the following graphic:



The screenshot shows the 'Better Start Configuration' interface. Under the 'General Configuration' section, there is a table with three rows. The first two rows have 'OFF' selected for the 'Configuration Value' column, while the third row has 'ON' selected. Below the table are 'Cancel' and 'Save' buttons.

Configuration Key	Configuration Value	
Allow the middle name of the child to be collected	OFF	
Allow the SEND status of the child to be collected	OFF	
My Reports enabled on home page	ON	

For more information about Better Start Configuration, see [Configuration](#) on page 38.

**More Information:**

For information regarding creating Better Start reports, refer to the Technical Guide: *Developing Better Start Reports* available on the One Publications website.

### Provider Reports

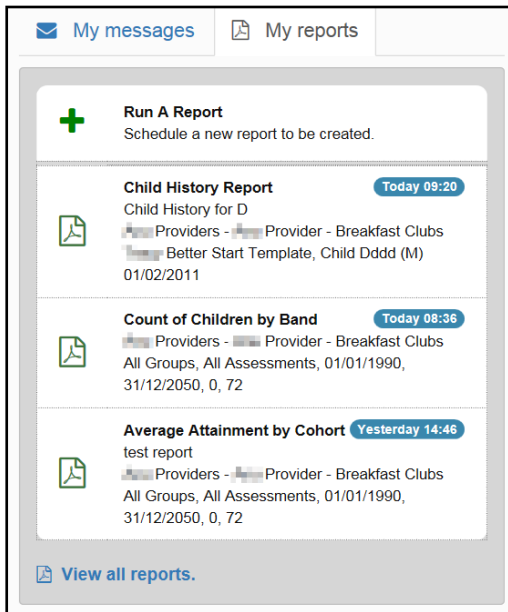
The following provider reports are included:

- Average Attainment by Cohort
- Count of Children in each Band
- Child History Report
- Child Progress Report
- Child Summary Report
- Child Summary Report by Group.

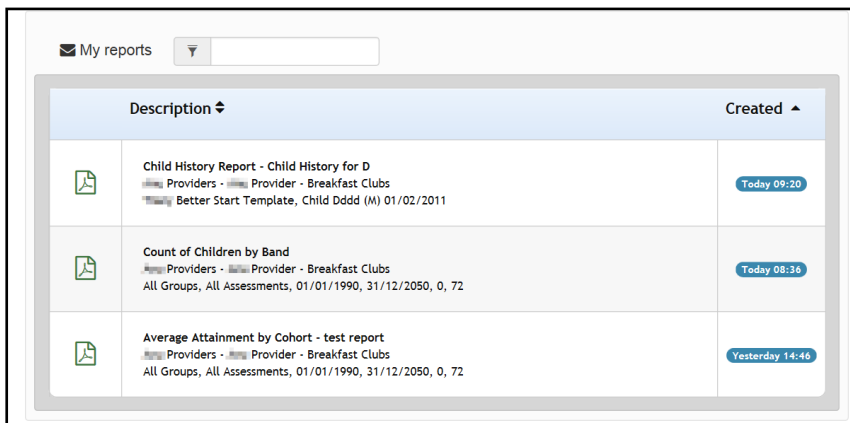
## Viewing Reports

To view a completed report:

1. Select the **My reports** panel to display a list of reports that have been run for the provider.



2. Select the required report or click the **View All Reports** link to display the **My Reports** page with a list of available reports and the dates they were created.



3. If required, enter text to filter the list or click on a heading to sort by **Description** or when **Created**.
4. Click the PDF icon to display the report as a PDF.

Alternatively, click the report description to view the **Report Completed** page for the selected report.

## Completing Assessments

**Report Completed - Child History Report**

1 **Report**  
Select the report

2 **Detail**  
Enter parameters

3 **Processing**  
The report runs

4 **Result**  
View the report

The report has completed processing and can be viewed by clicking on the link below.

Processing Status

**Report Submitted:** Today 09:20  
**Run Status:** The report ran at 26/10/2016 09:20:40

Summary of the submitted report

**Provider Service:** Anu Providers - Anu Provider - Breakfast Clubs  
**Report Chosen:** Child History Report  
**Description:** Child History for D  
**Summary of Parameters:** Tracy Better Start Template, Child Dddd (M) 01/02/2011

[Previous](#) [Home](#) [View Report](#) [Remove Report](#)

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

**CAPITA | one** Child History Report

Provider - Breakfast Clubs - Providers

**Name:** Child Dddd **Template:** Better Start Template

Assessment Dates:

Aspect:	20/10/2016
AGA 346005 Result Mark	50
CAS Ph Matter Physical Chang	E
Health	3
Imaginative	3
Listening and Attention	2
Making Relationships	1
Managing Feelings	1
Media Material	1
Moving and handling	1
Numbers	7
People	1
Reading	1
Self Confidence	2
Shapes	3
Speaking	2
Technology	3
Understanding	3

Report Generated: 26/10/2016 9:20:41 Page 1 of 2

## Running Reports

To run a report:

- Select the **My reports** panel.

My tasks My messages My reports

**Run A Report**  
Schedule a new report to be created.

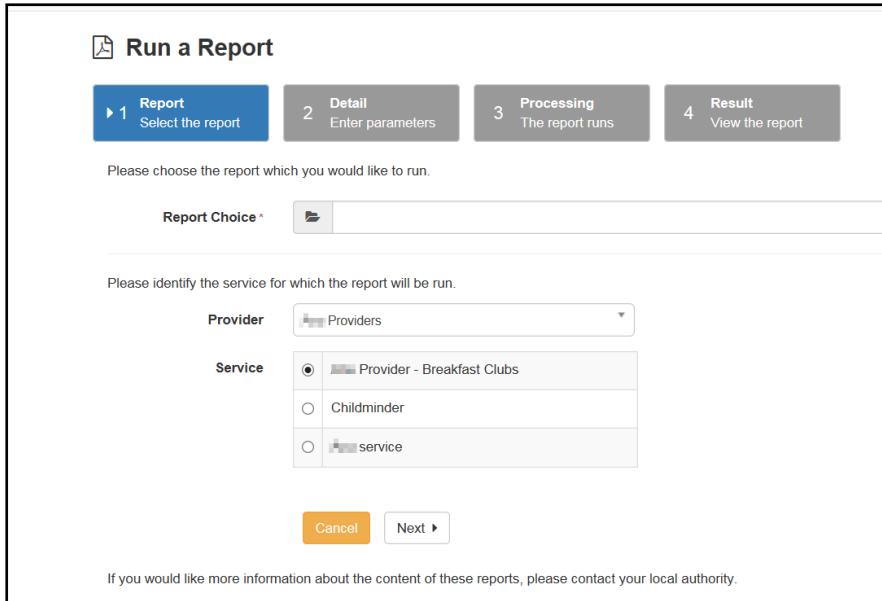
You don't have any reports yet.  
Reports you run will be displayed here.

**Add Adhoc Assessment**  
Start an adhoc assessment

**Assessment 2 - Better Start Template**  
Providers - Provider - Breakfast Clubs Not Started, Adhoc Assessment

**Post Check - Better Start Template**  
Bumble Bee Nursery - Full Day Care Submitted, Adhoc Assessment

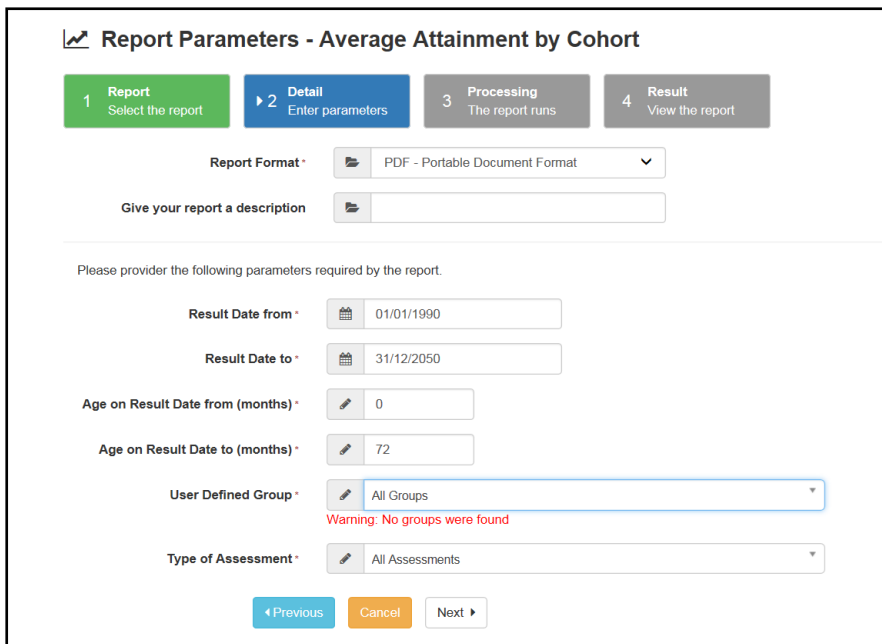
- Click the **Run a Report** link to display the **Run a Report** page.



3. Select a report from the **Report Choice** drop-down. A description of the report is displayed beneath the report name.
4. Select a **Provider** from the drop-down.
5. Select the radio button for the required **Service**.

**NOTE:** Only active services are listed.

6. Click the **Next** button to display the **Report Parameters** page.



7. Select a **Report Format**.
8. Enter a description.
9. Enter the report parameters.
10. Click the **Next** button to run the report and display the **Report Queued** screen.

## Completing Assessments

### Report Queued - Average Attainment by Cohort

1 Report  
Select the report

2 Detail  
Enter parameters

3 Processing  
The report runs

4 Result  
View the report

Please wait while the report is being processed, this may take some time. You may leave this page at any time, the report will continue running and can be seen in your 'My Reports' area.

Processing Status

**Report Submitted:** Today 14:46

**Run Status:** The report is in a queue for processing at position : 1

Summary of the submitted report

**Provider Service:**  Providers -  Provider - Breakfast Clubs

**Report Chosen:** Average Attainment by Cohort

**Description:** test report

**Summary of Parameters:** All Groups, All Assessments, 01/01/1990, 31/12/2050, 0, 72

← Previous
Home
↻ Refresh Report Progress

✖ Cancel Execution

11. When the report has completed, the **Report Completed** screen is displayed.

### Report Completed - Average Attainment by Cohort

1 Report  
Select the report

2 Detail  
Enter parameters

3 Processing  
The report runs

4 Result  
View the report

The report has completed processing and can be viewed by clicking on the link below.

Processing Status

**Report Submitted:** Today 14:46

**Run Status:** The report ran at 25/10/2016 14:47:00

Summary of the submitted report

**Provider Service:**  Providers -  Provider - Breakfast Clubs

**Report Chosen:** Average Attainment by Cohort

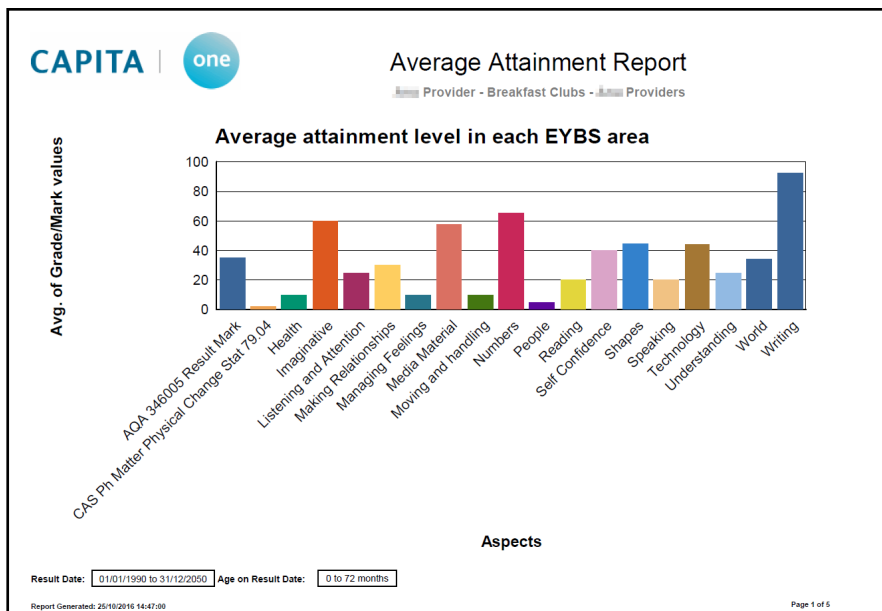
**Description:** test report

**Summary of Parameters:** All Groups, All Assessments, 01/01/1990, 31/12/2050, 0, 72

← Previous
Home
View Report

✖ Remove Report

12. If required, click the **View Report** button to view the report.



## 06 | Glossary of Terms

### Aspects

Aspects are a method of defining the criteria for measuring performance. They are used in PULSE to hold results against a student.

### Marksheet

A marksheet is used in PULSE to present and manipulate a set of results for a group of aspects and a group of students. A marksheet can only be associated with one template.

### Assessment Template

An assessment template is used to define the set of columns displayed in a marksheet.

### Result Set

A result set is a mechanism for grouping a set of aspects (results) together to enable their bulk import/export and analysis.

### Service Group

A service group is used to process several services together when creating tasks, composing messages or generating reports. They are set up by the Local Authority administrator.

### User Defined Group

User defined groups are used by providers to group children together for reporting purposes. They are set up by providers when completing assessment tasks.



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