

Managing Early Years Providers Handbook

last updated for the Spring 2019 release

Handbook

CAPITA

Copyright

© 2019 - 2020 Capita Business Services Limited. All rights reserved.

No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

www.capita-one.co.uk

Contacting Capita Software Support

You can log a call at https://support.capitasoftware.com/

Providing Feedback on Documentation

We always welcome comments and feedback. If you have any comments, feedback or suggestions please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

01	Document Change Control	5
0 2	Introduction	7
	Overview	7
	Using this Handbook	7
	Permissions	8
0 3	Managing Provider and Service Details	9
	Introduction	
	Searching for a Provider	
	Adding a New Provider	10
	Viewing Provider Details	11
	Updating Provider Basic Details	
	Updating the Provider Entity	12
	Updating the Provider Entity Details	13
	Maintaining Provider Contacts	13
	Adding a New Contact	13
	Removing a Contact	14
	Maintaining Provider Organisations	
	Selecting a Provider Organisation	15
	Adding a New Provider Organisation	15
	Maintaining Provider Staff	16
	Adding a New Staff Member	17
	Displaying Staff Basic Details	17
	Updating Staff Basic Details	
	Removing a Staff Member	
	Maintaining Early Years Staff Details	21
	Maintaining Provider Services	
	Adding a Service for a Provider	
	Recording Registration History	
	Displaying Details of a Service Provision	
	Searching for a Service Provision	
	Managing the Communication Log	43
	Logging a New Communication	43
	Searching for a Logged Communication	
	Managing Complaints	
	Adding a New Complaint	
	Viewing Complaints for a Provider	
	Viewing Complaints for a Service	51
	Managing Income	
	Adding Income for a Provider	

	Viewing Income for a Provider	53
	Managing Job Vacancies	54
	Adding a Job Vacancy	54
	Viewing Job Vacancies for a Provider	56
	Viewing Job Vacancies for a Service	56
	Managing Links	57
	Viewing Links for a Provider	57
	Selecting a new Receiver for a Provider	58
	Updating Memberships for a Provider	59
	Updating Representatives for a Provider	60
	Managing Monitoring	61
	Adding Monitoring Details	61
	Viewing Monitoring Information for a Provider	63
	Viewing Monitoring Information for a Service	63
	Viewing Provider Census Details	64
	Viewing Historical Provider Census Details	65
	Managing Availability and Capacity for a Service	65
	Adding Opening Dates and Times	65
	Adding Availability	68
	Adding Details of Age Ranges for the Service	69
	Adding Capacity Details for the Service	70
	Adding Vacancy Information for the Service	71
	Viewing Availability and Capacity for a Service	
	Managing Service Charges	72
	Adding Service Charges and Cost Details	72
	Viewing Service Charges and Cost Details	74
04	Ofsted Data Import	77
	Setup and Activate Audit Log Alert	77
	Ofsted Registration Workflow Messages	78
	New Provider	79
	Search Ofsted Data	80
	Audit trail	80
<i>0</i> 5	Glossary of Terms	81
Ind	lex	82

01 Document Change Control

Date	Release	Description					
Autumn		Ofsted Data Import					
2020		A section for Ofsted data Import is now included the handbook.					
		For more information, see Ofsted Data Import on page 77					
Spring	3.68	Consent to Share Information					
2019		'Publish to FID' has been amended to behave/work independently to any selection made in 'OFSTED Consent Withheld' field. This changed means records will still be Published to Family Information Directory (FID) irrespective if 'OFSTED Consent Withheld' is selected or not.					
		For more information, see <u><i>Recording Consent to Share</i></u> <u>Information details</u> page 30					
Autumn	3.65	Additional Information panel					
2018		The Additional Information panel has been added to the Maintain Service Provision page. It is used to display the additional information about a service that the Local Authority has collected from providers using the Self Update portal. For more information, see <u>Displaying Additional</u>					
		Information for a Service on page 39.					
		Service Provision Details panel					
		A new text field called Details of your 30 hours offer has been added to the Service Provision Details panel. It is used to display the information that the Local Authority has collected from providers about their 30 hours offering using the Self Update portal.					
		For more information, see <u>Displaying Details of a Service</u> <u>Provision</u> on page 39					
		Extended Offer Ceases From					
		If the provider uses the Self Update portal to update their details to say that this service no longer offers extended childcare, when the changes are submitted and approved by the LA, the Extended Offer Ceases From term is updated.					
		For more information, see <u>Maintaining Provider Services</u> on page 25					

Date	Release	Description
		Provider Census
		The Provider Census page is now only used to view historical census data and not to update the Early Years Census. This is now updated in the Self Update portal or in the v4 Client via Early Years Census Return .
		For more information, see <u>Viewing Provider Census Details</u> on page <i>64</i>

02 Introduction

Overview

Early Years is part of the One v4 Client. It is used to enter and maintain records of childcare providers and early years services. It also records information about the children attending early years settings, including the number of hours funded through free entitlement, and enables payments to be made to the childcare providers.

Using this Handbook

This handbook is intended for those using Early Years v4 Client to maintain details of early years childcare provision. It covers the functionality for managing the following:

- Provider Basic Details
- Provider Contacts
- Provider Organisations
- Provider Staff
- Provider Services
- Communication Log
- Complaints
- Income
- Job Vacancies
- Links
- Monitoring
- Viewing Historical Provider Census
- Availability and Capacity
- Service Charges.

More Information: One Early Years Setup, Managing Early Years Payments, One Early Years Headcount Provider Portal and One Early Years 30 Hour Entitlement Provider Portal handbooks available on the One Publications website and on My Account.

Permissions

Early Years uses business processes to determine which user groups have access to specific functionality. User groups are assigned read, read-write, read-write-delete or deny permissions to each Early Years business processes. Permissions are maintained in the One v4 Client. One System Administrators should create user groups with the desired level of access to the following business processes and main business processes:

- Early Years Administration
- Early Years Finance
- Early Years Processing
- Early Years Setup.

Additional Resources:

Reference Guides: User Group Permissions and *User Group Processes* available on the One Publications website and on My Account.

03 Managing Provider and Service Details

The **Maintain Provider** page provides panels and links that enable you to maintain information about the childcare provider and the service provision.

[Maintain Provider: Bun	ble Bee Nursery]	×	🧐 Links
💾 Save 📄 New 🚫 N	lemo 🔓 Set ACL 🔲 Data Panels 🖤 Alerts 🚮 Sql Mail Merge 🚔 UDF Manager		
	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details 🔍 🧳	7	Links
01. Basic Details			Communication Log Complaints
Provider Name	Bumble Bee Nursery		Income
Entity Type			Job Vacancies
	Base Base Person		Links
	Establishment		Monitoring
Provider ID			Provider Census
			Reports
Provider Entity	Bumble Bee Nursery 🔍 📉 Detail		V3 Contact Log
Address		Ε	
Email	test@madeupsite.com		
Website			
Telephone	Fax Pron Tenan		
Opening Date	01/01/2001 -		
Closure Reason			
Closing Date	Creditor Reference G1234		
crosing suic	Vinder Rice G1234		
Insurer			
Parent Provider	e, ×		
Premises Type	•		

Searching for a Provider

1. Select Focus | Early Years | Search for Provider to display the Search childcare provider page.

Search childcare provider										
🏦 Search [2] Collapse 👻 🤤 Clear										
Search for Provider										
Provider Name	bee									
Postcode			DCSF URN							
Status		•	Funded Status	•						
📄 New 💥 Delete 🗾	Open 📘	Open In New V	Vindow 🕹 Next 🏫 Previous							
Provider Name	DCSF URN	Status	Provider Address							
Beeches Special School	0	Not Yet Open								
Bumble Bee Nursery	506462	Open	Contrast from the cardina and the							

- 2. Enter one or more search criteria as follows:
 - Two or more characters of **Provider Name**.
 - First three or more characters of **Postcode**.
 - First two digits of **DCSF URN**.

3. Click the **Search** button to display a list of matching providers.

Adding a New Provider

A new provider record can be created to record provider details.

When adding a new provider, an entity type must be selected. It is recommended that the entity type is selected as follows:

- If the childcare takes place in a school, select an **Entity Type** of **Base**.
- If the provider is a childminder, it is recommended that you select an Entity Type of Person enabling you to link them to a person record.
- If the childcare takes place in a building such as a village hall, it is recommended that you select an Entity Type of Establishment.

Every provider has a linked base. If the entity type is base, the linked base will be the same base (school). If the entity type is person or establishment, a linked base record is automatically created using the details of the person or establishment. If a child attends a funded service, the linked base is used in the child's school history record.

To add a new provider record:

- 1. Search for the provider via **Focus | Early Years | Search for Provider**. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Click the New button to display the Maintain Provider: New Provider page.

[Maintain Provider: New	Provider]						
💾 Save 📄 New 🔿 N	1emo 🛞 Set ACL 🔲 Da	ata Panels 🛛 🦞	' Alerts 🔐 Sql Mai	l Merge 🔗 UDF N	lanager		
	02. Provider Contacts					fined Fields	01. Basic Details 🗸
01. Basic Details							
Provider Name]		
Entity Type	Base	Revise			-		
	Person						
	Establishment						
Provider ID			Base URN				
Provider Entity				(🔪 🗙 🔟 🛛 <u>Deta</u>	<u>.</u>	
Address					$\uparrow \times$		
Email							
Website							
Telephone] ।	Fax				
Opening Date		-					
Closure Reason			-				
Closing Date			Creditor Reference Number				
Insurer							
Parent Provider				(X		
Premises Type			-				

- 3. Enter a **Provider Name**.
- 4. Select an Entity Type of Base, Person or Establishment.
- 5. Click the browse button to display the **Search Base**, **Person Enquiry** or **Search Establishment** dialog and select a **Provider Entity**.

🕥 Search Base			X	J
🎢 Search [🖻 Collapse	•]
Base Enquiry				
Name				
Base Type	✓ Active ✓			
Base Selection	All Assessment Stages - School No.			
URN				
Select New +		 		
Select New Wr	Next Previous			

If the required base, person or establishment is not listed, click the **New** button to add a new record.

- 6. If required, enter an **Opening Date**.
- 7. If required, enter a Creditor Reference and Insurer.
- 8. If required, click the browse button to display the **Search Childcare Provider** dialog and select a **Parent Provider**.
- 9. If required, select a Premises Type from the drop-down (Lookup Table ID: 0480).
- 10. To add details of contacts, select the **Provider Contacts** tab. For more information, see <u>Adding</u> <u>a New Contact</u> on page *13*.
- 11. To record details of the umbrella organisation, select the **Provider Organisation** tab. For more information, see <u>Maintaining Provider Organisations</u> on page *15*.
- 12. To record staff details, select the **Staff** tab. For more information, see <u>Adding a New Staff</u> <u>Member</u> on page *17*.
- 13. To record service details, select the **Provider Services** tab. For more information, see <u>Adding a</u> <u>Service for a Provider</u> on page 25.
- 14. Click the **Save** button.

Viewing Provider Details

- 1. Search for a provider. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Select the required **Provider Name** in the list and click the **Open in New Window** button to display the **Maintain Provider** page, which has the following tab pages:

Managing Provider and Service Details

[Maintain Provider: Bun	nble Bee Nursery]		\$	2
💾 Save 📄 New 🚫 N	Viemo 😚 Set ACL 🔲 Data Panels 🔻 Alerts 💣 Sql Mail Merge 🚔 UDF Manager			
🕥 💿 01. Basic Details	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields	01. Basic Details	• 1	•
01. Basic Details				*
Provider Name	Bumble Bee Nursery			
Entity Type	Base Base			
	O Person			
	Establishment			
Provider ID	50007 Base URN			
Provider Entity	Bumble Bee Nursery 🔍 X 🔟 Detail			
Address				=
Email	test@madeupsite.com			
Website				
Telephone	Fax Plant Fax			
Opening Date	01/01/2001 🔹			
Closure Reason	· ·			
Closing Date	Creditor Reference G1234 Number			
Insurer				
Parent Provider	Q , X			
Premises Type	v			

- Basic Details displays the basic information about the provider.
- **Provider Contacts** displays the name and role details of contacts for the provider.
- **Provider Organisation** displays details of the umbrella organisation.
- **Staff** displays the details of staff working for the provider.
- **Provider Services** displays the services provided.
- **User Defined Fields** displays any UDFs defined for provider details.

Updating Provider Basic Details

The **Entity Type** and **Provider Entity** can be changed via the **Revise** button. The remaining details are updated by clicking the **Detail** button and updating the base, person or establishment details.

Updating the Provider Entity

The entity type can be changed, but it is recommended that it is selected as follows:

- If the childcare takes place in a school, select an **Entity Type** of **Base**.
- If the provider is a childminder, it is recommended that you select an Entity Type of Person enabling you to link them to a person record.
- If the childcare takes place in a building such as a village hall, it is recommended that you select an Entity Type of Establishment.

Every provider has a linked base. If the entity type is base, the linked base will be the same base (school). If the entity type is person or establishment, a linked base record is automatically created using the details of the person or establishment. If a child attends a funded service, the linked base is used in the child's school history record.

NOTE: Changing the **Entity Type** from **Base** to **Person** or **Establishment** does not change the linked base for the provider. If required, a new linked base can be selected.

- 1. Search for and select a provider.
- 2. Click the **Revise** button.

[Maintain Provider: Bum	ble Bee Nursery]		l
💾 Save 📄 New ⊘ N	emo 🎧 Set ACL 🗖 Data Panels 🐨 Alerts 👸 Sql Mail Merge 🔄 UDF Manager		
3 01. Basic Details	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields	01. Basic Details	
Provider Name	Bumble Bee Nursery		
Provider ID	50007 Base URN 566432		
Entity Type	Base 🔞 Revice		
	Person		
	Establishment		
Provider Entity	🔍 X 🔟 Detal		
Linked Base	Bumble Bee Nursery 🔍 X 🔟 Detai		
Address			
Email	test@madeupsite.com		
Website			
Telephone	Fax Uncertainty		
Opening Date	01/01/2001 👻		
Closure Reason			
Closing Date	Creditor Reference G1234 Number		
Insurer			
Parent Provider	Q, X		
Premises Type	•		

- 3. If required, select a different radio button to change the Entity Type. Entity Type can be set to Base, Person or Establishment.
- 4. Click the browse button to display the **Base Search**, **Person Enquiry** or **Search Establishment** dialog and select a new **Provider Entity**.
- 5. If required, select a Linked Base.
- 6. Click the Save button.

Updating the Provider Entity Details

- 1. Search for and select a provider
- 2. Click the **Detail** button to display the **Person Details** or **Maintain Establishment** page, depending on the **Entity Type**.
- 3. Change the entity details as required.
- 4. Click the **Save** button.

Maintaining Provider Contacts

Provider contacts and their roles are maintained via the **Maintain Provider | Provider Contacts** panel.

Maint	ain Provider	Bumble Bee Nurs	sery]						
💾 Save 📄 New 🔷 Memo 😮 Set ACL 🔲 Data Panels 🤎 Alerts 👸 Sql Mail Merge 🚔 UDF Manager									
_	1		er Contacts 0	3. Provider Orga	anisation 04. Staff 05. Provi	der Services U	ser Defined Fi	elds	02. Provider Conta
02. P	rovider Cont	acts							
	Title	Forename	Surname	Role Code	Role Description	Start Date	End Date		🖶 Ado
•	Miss		100	DCRO	Day Care Regulation Officer	-		-	💥 Rem
	Miss			PRVCON	Contact	-		•	🖂 Deta
	Mrs	Contraction of the local division of the loc	1000	PRVOWN	Owner	•		•	
	Mrs	inches 1	All the second sec	PRVTSR	Treasurer	•		•	

Adding a New Contact

- 1. Search for and select a provider.
- 2. Select the **Provider Contacts** panel.
- 3. Click the Add button to display the Contact Roles Link Enquiry dialog.

Managing Provider and Service Details

🕥 Contact Roles Link Er	nquiry	
👫 Search [Collapse	-	
01. Contact Role Link		
Forename		
Surname		
Role Code		
RoleDescription		
Select 📄 New 🔯	Person Details	

4. Enter one or more search criteria and click the **Search** button to display a list of contacts.

S Co	ontact Roles	Link Enquiry			-		
🐴 Se	arch [🔁 Co	ollapse 👻					
01.	Contact Rol	e Link					
For	ename						
Surr	name]		
Rol	e Code	ADM					
Rol	e Description	<u>ר</u>			1		
Se 🖋	lect 📄 Ne	w 🔍 Persor	n Details				
Title	Forename	Surname	Role Code	Role Description	Start Date	End Date	<u>^</u>
	lines -	1000	SADMIN	Senior Admin Officer			
Mr	The second second	1000	ADMOFF	Admissions Team Contact			=
	1000	1000	SENADM	SEN Admission Team Contact			
Dr	Contraction of the	1000	ADMOFF	Admissions Team Contact			
Mr	And a second	1000	ADM	Admin Officer			

- 5. Select the required person and click the **Select** button.
- 6. Click the **Save** button.

Removing a Contact

- 1. Search for a provider.
- 2. Select the **Provider Contacts** panel.
- 3. Select the contact you want to remove.
- 4. Click the **Remove** button to display the confirmation message:

Do you really want to remove the selected record?

5. Click the Yes button.

Maintaining Provider Organisations

The **Maintain Provider** | **Provider Organisation** panel is used to maintain details of the umbrella organisation for the childcare provider.

Maintain Provider: Bum	ble Bee Nursery]				×
	_	a Panels 🛛 👻 Alerts 🛐 Sql Mail M			
01. Basic Details 03. Provider Organisatio		3. Provider Organisation 04. Staf	f 05. Provider Services User D	efined Fields 03. Provider Organis +	1
Umbrella Organisation	Bumble Bee		Q, X		
Bank Account Name	BB Nursery				
Bank Sort Code	103313	Bank Account Number	144312		
Creditor Number	G1234	Insurance End Date			
Account Validated Date		 Organisation Type 	•		
Organisation Details					

Selecting a Provider Organisation

- 1. Search for and select a provider
- 2. Select the **Provider Organisation** panel.
- 3. Click the browse button to display the Search for Umbrella Organisation dialog.

1	Search for Umbrella (Drganisation	
6	🌺 Search [🖻 Collapse	•	
	Basic Details		
	Name		
	Bank Account Name		
	Bank Account Number	Bank Sort Code	
	Creditor Number		
	✓ Select 📄 New 💥 [Delete 📄 Open In New Window	

- 4. If required, enter search criteria.
- 5. Click the **Search** button to display a list of umbrella organisations.
- 6. Select the required organisation and click the Select button.

Adding a New Provider Organisation

- 1. Search for and select a provider.
- 2. Select the **Provider Organisation** panel.
- 3. Click the browse button to display the Search for Umbrella Organisation dialog.
- 4. Click the New button to display the New Umbrella Organisation dialog.

Managing Provider and Service Details

8	[New Umbrella Orga	nisation]			_				
P	Save 📄 New								
3	💿 Basic Details 🛛 Pr	oviders						Basic Details	• 🕖
	Basic Details								
1	Name]		
0	Contact					Q 🗙	< <u>8</u>		
E	Bank Account Name								
E	Bank Account Number				Bank Sort Code				
0	Creditor Number				Insurance End Date		-		
1	Account Validated Date			-					
F	Payee Address						$_{\odot}$ \times		
	Providers								
Ir									
	Provider Name Provide	r Address	Locality	Reference Numbe	er Area			-	Add Remove
								×	Kemove

5. Enter a **Name**.

- 6. If required, enter the remaining basic details:
 - a. Click the browse button to display the **Person Enquiry** and select a **Contact**.
 - b. Enter the bank account details and Creditor Number.
 - c. Select an Insurance End Date and Account Validated Date.
 - d. Select a Payee Address.
- 7. If required, click the **Add** button to display the **Search for Provider** dialog and select providers to associate with the organisation.

Search for Provider	_		
👫 Search 🔁 Collapse	-		
Search for Provider			
Provider Name			
Provider Postcode		Registered	•
Reference Number			
Service Type			Q ×
Service Type Status	-		
🖋 Select 📰 Open 🖶	Next 👚 Previous		

- a. Enter search criteria and click the **Search** button to display a list of providers.
- b. Select one or more providers in the list and click the **Select** button.
- 8. Click the **Save** button.

Maintaining Provider Staff

The **Maintain Provider** | **Staff** panel is used to maintain details of the staff employed at the childcare provider.

[Maintain Provider: Bumble Bee Nursery]	×
💾 Save 📄 New 🟈 Memo 🔒 Set ACL 🔲 Data Panels 🤻 Alerts 💣 Sql Mail Merge 🔗)F Manager
💿 💿 01. Basic Details 02. Provider Contacts 03. Provider Organisation 04. Staff 05. Pro	ler Services User Defined Fields 04. Staff 🔹 🎸
04. Staff	· ·
Family Name Given Name Chosen Family Name Chosen Given Name Given Name 2 Gender	itle Date of Birth Postcode Pole
Taniny kanie Green kanie Chosen Taniny kanie Chosen Green kanie Green kanie 2 Genden	Remove
	Details

Adding a New Staff Member

- 1. Search for and select a provider to display the Maintain Provider page.
- 2. Select the **Staff** panel.
- 3. Click the Add button to display the Staff Enquiry dialog.

Staff Enquiry			_	_	_		_			x
👫 Search 💽 Collapse	•									
Staff Enquiry										
Name	Browning]		
Sounds Like Search	×		Gender	1	Not Specifie	ed	•			
Date of Birth		-	Postcode							
NI Number			Staff Type	1	All People		•			
Role			•	•						
Select 📄 New 🚞 🤇	Open 🕹 Next	Previous								
Family Name Given	Name Chosen	Family Name CI	hosen Given Name	Given Name 2	Gender	Title	Date of Birth	Postcode	Role	-
Browning			100		Male		-			Ξ
Browning					Male					
Browning					Female					

- 4. Enter one or more search criteria as follows:
 - a. Enter two or more characters of Name.
 - b. Enter three or more characters of **Postcode**.
- 5. If required, enter further search criteria:
 - a. Select Gender from the drop-down.
 - b. Select Date of Birth.
 - c. Enter NI Number.
 - d. Select Staff Type from the drop-down.
 - e. Select Role from the drop-down.
- 6. Click the **Search** button to display a list of people.
- 7. Select the required person and click the Select button.

Displaying Staff Basic Details

- 1. Search for and select a provider.
- 2. Select the Staff panel.
- 3. Select the required member of staff.
- 4. Click the **Details** button to display the **Staff Detail** page with panels for **Staff Basic Details**, **Staff Qualifications**, **Training Manager Courses**, **Training Summary** and **Checks**.

Staff Detail [Jon		×	links
	Data Panels 🏠 UDF Manager etails 2. Staff Qualification Details 3. Training Manager Courses 4. Training Summary 5. Checks User Defined Fields 1. Staff Basic Details 🔹	1	Links
1. Staff Basic Details			Early Year Staff
Title	Detals		
Family Name			
Given Name	Jon		

5. If required, click the **Details** button on the **Staff Basic Details** panel to display the **Person Details** dialog.

Updating Staff Basic Details

Updating Staff Qualification Details

2. Staff Qualit	. Staff Qualification Details										
Qualification	Subject	Second Subject	Qualification Level	Date Awarded	🖶 Add						
GCSE	Child Care				🔝 Edit						
					💥 Remove						

- 1. Display the staff basic details.
- Click the Add button on the Staff Qualification Details panel to display the New Qualification dialog.

Alternatively, to edit an existing qualification, select it and click the **Edit** button. To remove a qualification, select it and click the **Remove** button.

New Qualification]								x
💾 Save 🟈 Memo								
🔇 💿 Qualification Det	ails					Qualification [Details	- 🥖
Qualification Details								
Qualification	GCSE		•					
Subject	Child Care		•					
Second Subject			•					
Place of Study			•					
Qualification Level			•					
Date Awarded		-	Verified	×				
Title								
Good Honours Degree								
Class Of Degree						-		
Country Of Origin					•			

- 3. Select a Qualification from the drop-down (Lookup Table ID: 0010).
- 4. Select a **Subject** from the drop-down.
- 5. If required, enter the following:
 - a. Select a Second Subject.
 - b. Select a Place of Study (Lookup Table ID: 0615).
 - c. Select a Qualification Level (Lookup Table ID: 0616).
 - d. Enter Date Awarded.
 - e. Enter Title.
 - f. Select a Class of Degree (Lookup Table ID: 1018).
 - g. Select a Country of Origin (Lookup Table ID: 1019).
- 6. If required, select one or both of the following check boxes to display a tick:
 - Verified (indicates that the qualification has been verified).
 - Good Honours Degree.
- 7. Click the Save button.

Updating Training Details

The **Training Manager Courses** panel displays information about courses attended by the staff member and booked using the Training Manager module. The **Training Summary** panel is used to record other training attended by the staff member.

1. Display the staff basic details.



2. Click the Add button on the Training Summary panel to display the New Training dialog.

Alternatively, to edit an existing training record, select it and click the **Edit** button. To remove a training record, select it and click the **Remove** button.

8	[New Training]				
P	Save 🔷 Memo				
	🕖 💿 Training Details				Training Details 👻 🖌
6	Training Details				
1	Training Date	▼	Renewal Date	•	
	Level	•			
	Description				
	Amount		Fund		
•	Training Days				
	Qualification Obtained		-		J

- 3. Select a Training Date.
- 4. Enter a **Description**.
- 5. If required, enter the following Training Details:
 - Select a **Renewal Date**.
 - Select a Level.
 - Enter a **Description**.
 - Enter an **Amount**.
 - Enter a Fund.
 - Enter Training Days.
 - Select a Qualification Obtained (Lookup Table ID: 0010).

Updating Staff Checks

The Staff Checks panel is used to record clearance checks made for the member of staff.

1. Display the staff basic details.

5. Checks				
Application Ref	Date Requested	Date Cleared	Clearance Type	🖶 Add
1234	01/04/2015		Basic	🕤 Edit
				💥 Remove

2. Click the Add button on the Checks panel to display the Clearance Check dialog.

Alternatively, to edit an existing check, select it and click the **Edit** button. To remove a check, select it and click the **Remove** button.

[Clearance Check]						
💾 Save 🧼 Memo						
💿 💿 Clearance Check						Clearance Check 🔹
Clearance Check						
Application Ref		Disclosure Ref				
Date Requested	-	Date Cleared			•	
Not Cleared	-	Clearance Type	None	•		
Counter Signatory				Q X		
Counter Sign Ref		Reply Destroy Date			•	
Invoice Number		Invoice Amount				

- 3. Enter an Application Ref.
- 4. Enter a **Date Requested**.
- 5. Select a Clearance Type.
- 6. If required, enter the following:
 - Disclosure Ref.
 - **Date Cleared** or date **Not Cleared**.
 - Click the browse button to display the Search Countersignatory dialog. Search for and select a Counter Signatory.

1	Search Countersignat	tory			
6	🐴 Search [🔁 Collapse	•			
	Person Enquiry				
	Name				1
	Gender	Not Specified -	National Health Service Number		
	Role	Countersignatory		Q X	
4	🖉 Select 📰 Open 🐥	Next 👚 Previous			

- Select a **Reply Destroy Date**.
- Enter Invoice Number and Invoice Amount.
- Click the **Memo** button to record a memo.
- 7. Click the **Save** button.

Removing a Staff Member

- 1. Search for and select a provider.
- 2. Select the **Staff** panel.
- 3. Select the staff member you want to remove.
- 4. Click the **Remove** button to display the confirmation message:

Do you really want to remove the selected record?

5. Click the Yes button.

Maintaining Early Years Staff Details

Details about a member of staff that are specific to Early Years can be maintained.

1. Display the staff basic details.

Staff Detail [Jon		×	🕀 Links
	Data Panels 🦀 UDF Manager etails 2. Staff Qualification Details 3. Training Manager Courses 4. Training Summary 5. Checks User Defined Fields	1. Staff Basic Details 🔹 🖋	Links
1. Staff Basic Details			Early Year Staff
Title	Details		
Family Name			
Given Name	Jon		

2. Click the Early Years Staff link on the Links panel to display the Early Years Staff page with panels for Employer Details, Observations, Staff Other Checks and Staff Services.

		_							
Early Years Staff [Jon]		×							
💾 Save 📄 New 🗔 Data Panels 🦞 Alerts 👸 Sql Mail Merge 🚔 UDF Manager	🖳 Save 📄 New 🗔 Data Panels 👻 Alerts 👸 Sql Mail Merge 🤮 UDF Manager								
I Employer Details J. Employer Details Observations Staff Other Checks I. Employer Employer 									
1. Employer Details		^							
Early Years X Early Years Teacher X Professional Status									
Provider Name Employer Position Start Date End Date	🖶 Add								
testprovider11	🔝 Edit								
	💥 Remove								

Updating Employer Details

Early Years Staff [Jon]	\$						
💾 Save 📄 New 🗔 Data Panels 🦞 Alerts 👸 Sqi Mail Merge 🚔 UDF Manager							
I. Employer Details 2. Observations 3. Staff Other Checks 4. Staff Services User Defined Fields	1. Employer Details 👻 👂						
1. Employer Details							
Early Years X Early Years Teacher X Professional Status Status							
Provider Name Employer Position Start Date End Date	🖶 Add						
testprovider/1	🕤 Edit						
	💥 Remove						

1. To add new employer details, click the **Add** button on the **Employer Details** panel to display the **New Employer Details** dialog.

To update existing employer details, select an employer and click the Edit button.

To remove employer details, select an employer and click the **Delete** button. 💾 Save Employeer Details Employeer Details -Employeer Details Provider Name Employer Employee Number Job Title Staff Type Start Date • End Date Teacher Status • Health Form Completed Health Check • Paid Employment Level 2 Qualification × Directl Envolvement Level 2 Maths × Qualification Reference Checked Level 2 English x Qualification P45 and P46 Level 3 Maths and EYE 🗙 Qualification Early Years Professional Status Level 3 English and EYE Qualification × × Contract Signed Date Level 3 Qualification × • (gained prior to September 2014) Early Years Teacher Level 3 EYE × X Qualification (gained Status after September 2014) Police Check •

2. On the **Employer Details** panel, click the **Provider Name** browse button to display the **Search Childcare Provider** dialog.

Search Childcare Prov	vider		_						
👫 Search 🖹 Collapse 👻 😋 Clear									
Search for Provider									
Provider Name									
Postcode		DCSF URN							
Status	-	Funded Status	-						
✓ Select New X Delete Open ↓ Next ↑ Previous									

- 3. Select the required provider. For more information, see <u>Searching for a Provider</u> on page 9.
- 4. If required, enter the following employer details for this member of staff:
 - **Employer** description.
 - Employee Number.
 - Job Title.
 - Select a **Staff Type** from the drop-down.
 - Start Date.
 - Select a **Teacher Status** from the drop-down.
- 5. If required, select one or more check boxes to display a tick:
 - Health Form Completed.
 - Paid Employment.
 - Direct Involvement.
 - Reference Checked.
 - P45 and P46.
 - Level 2 Qualification.
 - Level 2 Maths Qualification.
 - Level 2 English Qualification.
 - Level 3 Maths and EYE Qualication.
 - Level 3 English and EYE Qualification.
 - Level 3 Qualification (gained prior to September 2014).
 - Level 3 EYE Qualification (gained after September 2014).

Early Years Professional Status and Early Years Teacher Status are read-only check boxes.

- 6. If required, enter one or more of the following dates:
 - Contract Signed Date.
 - Health Check made. This date is displayed on the Staff Other Checks panel.
 - Police Check made. This date is displayed on the Staff Other Checks panel.
- 7. Click the Save button.

Updating Observations

2. Observations	
Observation Date Observer Name Observation Type	🖶 Add
	Edit
	X Remove

1. To add a new observation, click the Add button on the Observations panel to display the Staff Observation dialog.

To update an existing observation, select it and click the **Edit** button.

To delete an observation, select it and click the **Delete** button.

N	[Staff Observation]		×
💾 Si	ave 🔷 Memo		
0	1. Observation Description Description	tails 2. Observation Marks 1. Observation Detail	i • 🥖
1.0	Observation Details		
Ob	server		
Pro	ovider	Q, X	
Ob	servation Date	✓ Observation Time 00:00 🚖	
Ob	servation Type	▼ Ncy	
Stu	ident Present		
	Observation Marks		\equiv
	aching		
	arning		
	ainment	·	
Atti	itude And Behaviour		J

2. Click the **Observer** browse button to display the **Search Early Years Observer** dialog.

Search Early Years	Observer			
🏦 Search [🖹 Collap	ose 👻			
Person Enquiry				
Name				
Gender	Not Specified 👻	National Health Service Number		
Role	Early Years Observer		Q X	
🖌 🎻 Select 📰 Open	-Next 👚 Previous			

- a. If required, enter search criteria.
- b. Click the **Search** button to display a list of observers.
- c. Select an observer in the list and click the **Select** button.
- 3. Click the **Provider** browse button to display the **Search for Provider** dialog.
 - a. Enter search criteria and click the **Search** button.

Managing Provider and Service Details

Search for Provider				X
👫 Search 🖹 Collapse	•			
Search for Provider				
Provider Name	bee			
Provider Postcode	Registered		-	
Reference Number				
Service Type			Q X	
Status	•			
🖌 Select 🗾 Open 🚽	Next 👚 Previous			
Provider Name	Provider Address	Locality	Reference Number	Area
Beec				
Bumble Bee Nursery	CONTRACTOR AND A DUST OF A DUST OF A			Sec.

- b. Select the required provider in the list and click the Select button.
- 4. Select an Observation Date.
- 5. Select an **Observation Type** from the drop-down.
- 6. If required, enter the following on the **Observation Details** panel:
 - a. Select an Observation Time.
 - b. Enter NCY.
 - c. Select the Student Present check box.
- 7. If required, select the following Observation Marks (Lookup Table ID: 0579):
 - Teaching.
 - Learning.
 - Attainment.
 - Attitude and Behaviour.
- 8. Click the Save button.

Displaying Staff Other Checks and Staff Services

The **Staff Other Checks** panel displays the information entered via the **Employer Details** panel. See <u>Maintaining Early Years Staff Details</u> on page *21*.

The **Staff Services** panel displays information entered on the **Maintain Staff for Service** dialog via the **Maintain Service Provision** page. For more information, see <u>Recording Staff</u> <u>Information for the Service</u> on page *38*.

3. Staff Oth	er Checks										
Provider Na	ime /	Police Check	Health Check								
Bumble Bee	Nursery					 					
4. Staff Serv		_									
	lices										
test_staff											
Start Date	End Date	Staff Type	Direct Involvement	Job Title	Service						

Maintaining Provider Services

The **Provider Services** panel is used to maintain details of the services provided by the childcare provider.

Provider services can also be viewed and maintained via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page 42.

Adding a Service for a Provider

- 1. Search for and select a provider to display the **Maintain Provider** page. For more information, see <u>Viewing Provider Details</u> on page *11*.
- 2. Select the **Provider Services** panel.

05. Provider Services								
Service Name	Service Type Description	Service Address	FID Type	🖶 Add				
Bumble Bee Nursery - Full Day Care	Full Day Care	A TRACK THE REPORT OF THE DAY THE AND ADDRESS OF	ECD	😤 Remove				
				💽 Details				

3. Click the Add button to display the Maintain Service Provision: New Provision page.

Managing Provider and Service Details

Maintain Service Provisi	ion: New Provisio	on]						8
💾 Save 🔲 Data Panels	🛛 🕐 Alerts 🔗 S	iql Mail Merge 🔗	UDF Manager					
	sion Details 02.	Registration History	03. Consent to Sh	04. Service Public Contact	05. Service Private Contacts	06. Vocabulary	01. Service Provisior 👻	1
01. Service Provision D	etails							
Service Name								
Service Type Description		•	Service ID					
FID Type	None 👻		Authority-wide	×				
Provider Name				🔍 🗙 🔟	Detail			
CRB Policy			Same As Providers Address	×				
Address				🟫 🕽	<			
Start Date		-	End Date		•			
Registered For Nursery Education Grant/Fund			Previously Funded	×				
Offers Extended Childcare	×							
Details of your 30 hours offer	ĥ				•			
Extended Offer Ceases From		*						
OFSTED Provision Type	Not Specified		•					
FISID			Telephone Number					
Fax Number								
Email Address								
Website								
VY CUSIC								
Other Information								
					T			

- 4. Complete the service provision details as required. The following panels are available:
 - Service Provision Details. See Entering Service Provision Details on page 27.
 - Registration History. See <u>Recording Registration History</u> on page 28.
 - Consent to Share Information. See <u>Recording Consent to Share Information details</u> on page 30.
 - Service Public Contacts. See <u>Recording Service Public Contact details</u> on page 31.
 - Service Private Contacts. See <u>Recording Service Private Contact details</u> on page 32.
 - Vocabulary. See <u>Displaying the Vocabulary for the Service Provider</u> on page 32.
 - Keywords. See <u>Recording Keywords for the Service Provider</u> on page 33.
 - Funding Details. See <u>Recording Funding Details for the Service</u> on page 33.
 - Eligibility Details. See <u>Recording Eligibility Details for the Service</u> on page 33.
 - **Referral Details**. See <u>Recording Referral Details for the Service</u> on page 34.
 - Facility. See <u>Recording Facilities at the Service</u> on page 34.
 - Special Provision. See <u>Recording Special Provision for the Service</u> on page 34.
 - **Travel Information**. See <u>Recording Travel Information for the Service</u> on page 36.
 - Award Information. See <u>Recording Award Information for the Service</u> on page 37.
 - PPAYP Category. See <u>Recording PPAYP Category Details for the Service</u> on page 37.
 - Area Covered. See <u>Recording Area Covered Details for the Service</u> on page 38.

- Access Channel. See <u>Recording Access Channel Details for the Service</u> on page 38.
- Leisure Card: Displays any Leisure Card Info for the service.
- Staff Information. See <u>Recording Staff Information for the Service</u> on page 38.
- Additional Information. See <u>Displaying Additional Information for a Service</u> on page 39.
- **UDFs**: Displays any UDFs that are defined for this page.

Entering Service Provision Details

The Service Provision Details tab is used to record general information about the service.

- 1. On the Maintain Service Provision page, select the Service Provision Details tab.
- 2. Enter a Service Name.
- 3. Select a Service Type Description (Lookup Table ID: 0423).
- 4. Enter a Start Date.
- 5. If required, enter the following:
 - a. Select FID Type.
 - b. Select the **Authority-wide** check box to display a tick (service is available throughout the LA).
 - c. Select the CRB Policy check box to display a tick (indicates that CRB policy is in place).
 - d. Enter an **Address** for the service. Alternatively, select the **Same As Providers Address** check box to display a tick.
 - e. Select the **Registered for Nursery Education Grant/Fund** check box to display a tick. Alternatively, select the **Previously Funded** check box to display a tick.
 - f. If required, select the **Offers Extended Childcare** check box to display a tick (indicates that the service offers extended hours). Alternatively, select the check box to display a cross and select a term from the **Extended Offer Ceases From** drop-down.

NOTE: If the provider uses the Self Update portal to say that the service no longer offers extended childcare, when the changes are submitted and approved, the **Extended Offer Ceases From** term is automatically updated.

- g. Select an OFSTED Provision Type from the drop-down.
- h. Enter an FISID.
- i. Enter a Telephone Number, Fax Number, Email Address, Website Address and Other Information.
- 6. Click the **Save** button.

Recording Registration History

The **Registration History** panel is used to record the dates and types of registrations for the service. If the registration is linked to an imported Ofsted record, the Ofsted details can be displayed.

1. On the Maintain Service Provision page, select the Registration History tab.

[Maintain Service Provisi	on: New Provision]	\$	×
💾 Save 😪 Set ACL 📘	Data Panels 🦞 Alerts 💣 Sql Mail Merge 🚔 UDF Manager		
💿 💿 01. Service Provis	on Details 02. Registration History 03. Consent to Sh 04. Service Pu	blic Contact 05. Service Private Contacts 06. Vocabulary 02. Registration Histr 🗸 🏈	7
02. Registration History			^
Registration Details	Initial Contact Date Start Date End Date Registration Type Area Locality	/ 🖶 Add	
		Edit	
		X Remove	
		OFSTED Information	Ε

2. Click the Add button to display the Maintain Service Registration dialog.

🕥 [Maintain Service R	egistration]	_					
💾 OK 🔷 Memo							
📀 💿 01. Application	Information	02. Registration	Information	n 03. Location Info	rmation 04. Addi	itional Information	01. Application Inform 👻 🥖
01. Application Inform	ation						
Initial Contact Date	14/04/2015	•	Infe	o Pack Date	14/04/2015	-	
Intro Meeting Date		•	Ap	plication Date		-	
Application Status			- Ap	plication Type		-	J
02. Registration Inform	nation						
Registration Start Date		-	Re	gistration End Date		-	
Certificate Date		-	Ce	rtificate Number			
Reference Number			Q	×			
Registration Status			•				
Registration Type				-			
Early Years Register	×			mpulsory Childcare gister	×		
Voluntary Childcare Register	×		Daj	y Care Type		-	Ξ
Ownership Type				-			
Childminder Provider Category				*			
Sector		•					
03. Location Informati	on						
Area			+ Lo	cality		-	
Ward		•	Dis	strict		-	
04. Additional Informa	tion						
Amendment Reason				•			
Last Updated		-	Up	dated By			
Create Income Schedule Link	×						

- 3. If required, enter the following on the Application Information panel:
 - Initial Contact Date (automatically set to the current date).
 - Info Pack Date (automatically set to the current date).
 - Intro Meeting Date.
 - Application Date.
 - Select an Application Status (Lookup Table ID: 0717).
 - Select an Application Type (Lookup Table ID: 0716).

- 4. If required, enter the following on the Registration Information panel:
 - a. Registration Start Date.
 - b. Certificate Date.
 - c. Certificate Number.
 - d. To link the registration to an <u>imported Ofsted record</u>, click the **Reference Number** browse button to display the **Search for Ofsted** dialog.

Search for Ofsted				X
👫 Search [🔁 Collapse	-			
Search for Ofsted				
Provider Name]
Provider Postcode		Registration Status	•	
Matched	· · · · · · · · · · · · · · · · · · ·	Reference Number		
Search for Provider				
Service Type			Q ×	
Cpen In New Window	/ 🌭 Add Unmatched	♂ Select Ofsted Ref. No.		

- e. Enter search criteria and click the Search button to display a list of reference numbers.
- f. Select the required reference number and click the Select Ofsted Ref. No. button.
- g. Select a Registration Status (Lookup Table ID: 0718).
- h. Select a Registration Type (Lookup Table ID: 0423).
- i. Select one or more of the following check boxes to indicate that the service is included on the register:
 - Early Years Register
 - Compulsory Childcare Register
 - Voluntary Childcare Register.
- j. Select the **Day Care Type** (*Lookup Table ID: 0719*).
- k. Select the Ownership Type (Lookup Table ID: 0732).
 - If the Ownership Type is Childminder, you can select Childminder Provider Category.
- I. Select Sector (Lookup Table ID: 0720).
- 5. If required, enter the following on the Location Information panel:
 - Area (Lookup Table ID: 0471)
 - Ward (Lookup Table ID: 0802)
 - Locality (Lookup Table ID: 0470)
 - **District** (Lookup Table ID: 0801).
- 6. If required, enter the following on the **Additional Information** panel:
 - a. Select Amendment Reason (Lookup Table ID: 0481).
 - b. If a link to the income schedule is required, select the **Create Income Schedule Link** check box to display a tick.
- 7. Click the **OK** button.

Recording Consent to Share Information details

The **Consent to Share Information** panel is used to record the provider's consent to share information about the service.

1. On the Maintain Service Provision page, select the Consent to Share tab.

03. Consent to Share I	nformation			
OFSTED Consent Withheld			Publish to Local Internet	
OFSTED Special Considerations		*	Base Active Status	\checkmark
Publish to FID			Publish to FID Date Changed	
Provider Signature Received			Non-Consent Reason	×
Non-Consent Notes				
ECD Sent - Owner 1		-	FSD Sent - Owner 1	
ECD Sent - Owner 2		-	FSD Sent - Owner 2	
Publish Telephone Numbers?	×		Publish Address	×
Publish Cost Information	×		Telephone	×
In Writing	×		Mailouts	×

NOTE: OFSTED Consent Withheld and **OFSTED Special Considerations** are automatically updated when information is imported from Ofsted. The **Base Active Status** check box is called **Person Active Status** if the provider is a person. It is displayed as a tick if the base/person linked to the provider is active and as a cross if the linked base or person is inactive.

- 2. If the provider consents to share information locally, select the **Publish to Local Internet** check box to display a tick.
- 3. If the provider consents to share information about the service with the FID (Family Information Directory), select the **Publish to FID** check box to display a tick.

Alternatively, if they do not consent:

- a. Select the **Publish to FID** check box to display a cross.
- b. If required, select a Non-Consent Reason (Lookup Table ID: 1116).
- c. If required, enter Non-Consent Notes.

The **Publish to FID Date Changed** is automatically updated with the date that the check box is changed.

NOTE: The **Publish to FID** check box now works independently to any selection made in the **OFSTED Consent Withheld** check box. Publish to FID will displays a cross and cannot be updated if any of the following applies

Base/Person Active Status is a cross.

Ofsted Special Consideration is either **WREF** (Women's Refuge), **ANON** (Anonymity Requested) or **MOD** (Ministry of Defence).

- 4. If a provider signature has been received in connection with their consent to share information, select the **Provider Signature Received** check box to display a tick.
- 5. Select one or more of the following check boxes to display a tick if the provider has consented to share the following information about the service:
 - Publish Telephone Numbers?

Publish Address?

Publish Cost Information?

- 6. Select one or more of the following check boxes to display a tick if the provider has consented to share information about the service via the following methods:
 - Telephone
 - In Writing
 - Mailouts.
- 7. Click the Save button.

NOTE: For information about which services have sent FID data, see <u>Viewing Services that have sent</u> <u>FID Data</u> on page 42.

Recording Service Public Contact details

The **Service Public Contact** panel is used to record the contact details for the service to be sent to the FID for publishing.

Only one public contact can be recorded at a time. To record a new contact, first delete the existing entry.

NOTE: The same person or role cannot be recorded as both a private and public contact.

04. Service Public Cont	act	
Public Contact Summary	Title Forename Surname Role Code Role Description Miss PRVCON Contact Manual Remove Image: Details Details	ш
Contact Publishing	Publish All Publish Address Publish Telephone Publish Email	
	Publish One Line Address Type Start Date End Date Image: Start Date Home Address Home Address Image: Start Date Image: Start Date	
Role Details		

Adding a New Public Contact

- 1. On the Maintain Service Provision page, select the Service Public Contact tab.
- 2. Click the Add button to display the Contact Roles Link Enquiry dialog.
- 3. Record contact details. For more information, see <u>Adding a New Contact</u> on page 13.

Setting Information Sharing Preferences

All addresses for the selected public contact are listed. To update the preferences for information about this contact to be sent to the FID:

- 1. If the information is to be published, select the following **Contact Publishing** check boxes to display a tick:
 - Publish All.

- **Publish Address**. If more than one address is listed, select the check box adjacent to the required address.
- Publish Telephone.
- Publish Email.
- 2. If required, enter Role Details.
- 3. Click the Save button.

Removing Existing Contact Information

1. Click the **Remove** button to display the following message:

Do you really want to remove the selected record?

2. Click the Yes button.

Recording Service Private Contact details

The **Service Private Contact** panel is used to record one or more private contacts for the service. This contact information is <u>not</u> sent to the FID.

NOTE: The same person or role cannot be recorded as both a private and public contact.

1. On the Maintain Service Provision page, select the Service Private Contact tab.

[Maintain Service Provis	ion: B	umble Bee Nu	rsery - Full Day C	are]					×
💾 Save 😽 Set ACL 📘	Data	Panels 🦞 A	lerts 💣 Sql Mai	l Merge U	DF Manager				
🔇 📀 01. Service Provi	sion D	etails 02. Re	gistration History	03. Consent	to Sh 04. Se	ervice Public Contact 05. Serv	vice Private Con	ntacts 06. Vocabulary 05. Servi	ice Private C 👻 🥖
05. Service Private Con	tacts								
Private Contact Summary		Title	Forename	Surname	Role Code	Role Description	Start Date	🖶 Add	1
Summary	•	Miss	100	100	DCRO	Day Care Regulation Officer	•	😤 Remove	
		Mrs	in the second	and the second sec	PRVOWN	Owner	•	Details	
		Mrs	A. 1997		PRVTSR	Treasurer	-		
	•						ł	•	

2. To record a new contact, click the **Add** button to display the **Contact Roles Link Enquiry** dialog and add a new contact. For more information, see <u>Adding a New Contact</u> on page *13*.

Alternatively, to remove a contact, select it and click the **Remove** button.

Alternatively, to view the details of a contact, select it and click the **Details** button to display the **Person Details** page.

3. Click the **Save** button.

Displaying the Vocabulary for the Service Provider

The **Vocabulary** panel displays the vocabulary terms that are selected as being relevant to Early Years providers via **Tools | FID | Vocabulary**.

1. On the Maintain Service Provision page, select the Vocabulary panel.

[Maintain Service Pro	ovision: New Provision]	\$
💾 Save ; Set ACL	. 🔲 Data Panels 🛛 🚩 Alerts 💣 Sql Mail Merge 🚔 UDF Manager	
💿 📀 01. Service Pr	rovision Details 02. Registration History 03. Consent to Sh 04. Service Public Contact 05. Service Private Contacts 06. Vocabulary	06. Vocabulary 🔹 🥖
06. Vocabulary		
Vocabulary	Search Search Previous Search Next Show Provider Terms	1

2. If required, click the **Show Provider Terms** button to display only the terms selected for this provider.

Recording Keywords for the Service Provider

The **Keywords** panel enables you to select local keywords to be associated with the service.

1. On the Maintain Service Provision page, select the Keywords panel.

07. Keywords				
Keywords	Internal Code	Description	External Code	🖶 Add
				💥 Remove

- 2. To add a new keyword, click the **Add** button to display the **Lookup Codes KEYWORDS** dialog and select a keyword (*Lookup Table ID: 1115*).
- 3. Alternatively, to remove a contact, select it and click the **Remove** button.

Recording Funding Details for the Service

The **Funding Details** panel is used to record one or more payment bands and maintain stretched offer details for a service.

1. On the Maintain Service Provision page, select the Funding Details panel.

08. Funding Details		
Payment Band	Internal Code Description External Code Active	Add
	8	Remove
Stretched Offer	Internal Code Description External Code Active	Add
	X	Remove

- 2. To select a new **Payment Band** for the service, click the **Add** button to display the **Lookup Codes Payment Band** dialog and select a payment band (*Lookup Table ID: 1161*).
- 3. To select a new **Stretched Offer** for the service, click the **Add** button to display the **Lookup Codes Stretched Offers** dialog and select a stretched offer (*Lookup Table ID: 1178*).

Alternatively, to remove a **Payment Band** or **Stretched Offer**, select it and click the **Remove** button.

Recording Eligibility Details for the Service

The **Eligibility Details** panel is used to record information regarding eligibility for the service.

1. On the Maintain Service Provision page, select the Eligibility Details panel.

1	09. Eligibility Details	
ľ	Eligibility Details	
	L I	

- 2. Enter Eligibility Details.
- 3. Click the Save button.

Recording Referral Details for the Service

The **Referral Details** panel enables you to record referral criteria and procedures to be associated with the service.

1. On the Maintain Service Provision page, select the Referral Details panel.

0. Referral Details		
riteria Code	Internal Code Description External Code Active	
riteria Details		
teferral Procedure		

2. To add a new **Criteria Code**, click the **Add** button to display the **Lookup Codes – Referral Criteria** dialog and select a criteria code (*Lookup Table ID: 1086*).

Alternatively, to remove a Criteria Code, select it and click the Remove button.

- 3. If required, enter Criteria Details.
- 4. If required, enter a Referral Procedure.
- 5. Click the **Save** button.

Recording Facilities at the Service

The **Facility** panel is used to record details about the facilities available at the service e.g. car park or large garden.

1. On the Maintain Service Provision page, select the Facility panel.

11. Facility						
Facility	Internal Code	Description	External Code	Active	🖶 Add	
					💥 Remove	
Facility Notes				•	•	
				-	-	
Number Of Rooms				a.	_	

2. To add a new **Facility**, click the **Add** button to display the **Lookup Codes - Facilities** dialog and select a facility (*Lookup Table ID: 0475*).

Alternatively, to remove a **Facility**, select it and click the **Remove** button.

- 3. If required, enter **Facility Notes**.
- 4. If required, enter the Number of Rooms for the service.
- 5. Click the **Save** button.

Recording Special Provision for the Service

The **Special Provision** panel is used to record details about any special provision provided at the service.

1. On the Maintain Service Provision page, select the Special Provision panel.

12. Special Provision	
Disabled Access	
Wheel Chair Access	
Wheel Chair Access Notes	▲
SEN Children	x
Special Need	
Experience	
Consist Nords	
Special Needs Confidence	
	•
Cultural Provision	Internal Code Description External Code Active
	Remove
Special Needs Code	Internal Code Description External Code Active
	X Remove
Special Needs Notes	
Special Needs Notes	
	· · · · · · · · · · · · · · · · · · ·
Language Spoken	Internal Code Description External Code Active
	× × × × × × × × × × × × × × × × × × ×
Culture Notes	
	•
Diet Code	Internal Code Description External Code Active
	Kernarcode Description Externarcode Active Kernarcode Active Kernarcode Active
Special Diet Details	
Special Provision	
opedarerovision	
	▼
Emergencies	×

- 2. If required, enter details about **Disabled Access**.
- 3. If the service has wheelchair access, select the **Wheel Chair Access** check box to display a tick.
- 4. If required, enter Wheel Chair Access Notes.
- 5. If the service caters for Special Educational Needs, select the **SEN Children** check box to display a tick.
- 6. If required, enter details about **Special Need Experience** and **Special Needs Confidence** at the service.
- 7. To add details about **Cultural Provision**, click the **Add** button to display the **Lookup Codes – Cultural Provision** dialog and select a code (*Lookup Table ID: 1090*).

Alternatively, to remove a **Cultural Provision** code, select it and click the **Remove** button.

To add a Special Needs Code, click the Add button to display the Lookup Codes – Facilities – Special Needs dialog and select a code (*Lookup Table ID: 0721*).

Alternatively, to remove a **Special Needs Code**, select it and click the **Remove** button.

9. If required, enter **Special Needs Notes**.

10. To add details of Languages Spoken, click the Add button to display the Lookup Codes – Home Language dialog and select a code (*Lookup Table ID: 0002*).

Alternatively, to remove a Language Spoken, select it and click the Remove button.

- 11. If required, enter Cultural Notes.
- 12. To add a new **Diet Code** and record details of special diets catered for at the service, click the **Add** button to display the **Lookup Codes Diet** dialog and select a code (*Lookup Table ID:* 0474).

Alternatively, to remove a **Diet Code**, select it and click the **Remove** button.

- 13. If required, enter **Special Diet Details**.
- 14. If required, enter Special Provision.
- 15. If the service caters for emergencies, select the **Emergencies** check box to display a tick.
- 16. Click the **Save** button.

Recording Travel Information for the Service

The **Travel Information** panel is used to record details about travelling to the service, whether the service has parking spaces or its own transport facilities and any bases where school pickups are available.

1. On the Maintain Service Provision page, select the Travel Information panel.

13. Travel Information		
Parking Spaces	Own Transport	
Travel Information		
Directions		
		-
School Pickups		🚽 Add
		-
		🔚 Edit
		💥 Remove

- 2. If required enter the following:
 - a. Select the **Parking Spaces** check box to display a tick.
 - b. Select the **Own Transport** check box to display a tick.
 - c. Enter Travel Information.
 - d. Enter Directions.
- 3. If required, enter details of School Pickups:
 - a. Click the Add button to display the Provider Base Link Details dialog.

S Provider Base Link Details		
💾 Save		
🔇 💿 01. Base 02. Memo Details		02. Memo Details 🔹 🥖
01. Base		
Base	Q, X]
02. Memo Details		
Γ	۳	
	9	
	B	
	I	
	<u>U</u>	

- b. Click the **Base** browse button to display the **Base Enquiry** dialog and select a base.
- c. If required, enter Memo Details regarding pickups from this base.
- 4. Click the **Save** button.

Recording Award Information for the Service

The **Award Information** panel is used to record details of awards, quality assurance and accreditation for the service.

1. On the Maintain Service Provision page, select the Award Information panel.

14. Award Information	
Award Information	
Quality Assurance	Internal Code Description External Code Active
	X Remove
Accreditation	Internal Code Description External Code Active
	X Remove

- 2. If required, enter Award Information.
- 3. To add new **Quality Assurance** details for the service, click the **Add** button to display the **Lookup Codes Quality Assurance** dialog and select a code (*Lookup Table ID: 1091*).

Alternatively, to remove a **Quality Assurance** code, select it and click the **Remove** button.

4. To add new **Accreditation** details for the service, click the **Add** button to display the **Lookup Codes – Accreditation** dialog and select a code (*Lookup Table ID: 1083*).

Alternatively, to remove an **Accreditation** code, select it and click the **Remove** button.

5. Click the Save button.

Recording PPAYP Category Details for the Service

1. On the Maintain Service Provision page, select the PPAYP Category panel.

15. PPAYP Category		
PPAYP	Internal Code Description External Code Active	🖶 Add
		🗙 Remove

2. To add new **PPAYP** details for the service, click the **Add** button to display the **Lookup Codes** – **PPAYP-10** dialog and select a code (*Lookup Table ID: 1092*).

Alternatively, to remove a **PPAYP** code, select it and click the **Remove** button.

3. Click the **Save** button.

Recording Area Covered Details for the Service

1. On the Maintain Service Provision page, select the Area Covered panel.

16. Area Covered					
Area Covered	Internal Code Desc	cription Ex	xternal Code	Active	🖶 Add
					💥 Remove

2. To add a new **area** for the service, click the **Add** button to display the **Lookup Codes – Spatial Levels 1.0** dialog and select a code (*Lookup Table ID: 1081*).

Alternatively, to remove a **PPAYP** code, select it and click the **Remove** button.

3. Click the **Save** button.

Recording Access Channel Details for the Service

1. On the Maintain Service Provision page, select the Access Channel panel.

17. Access Channel						
Access Channel	Internal Code Description External Code Active	🖶 Add				
		💥 Remove				

2. To add a new **area** for the service, click the **Add** button to display the **Lookup Codes** – **LGCHL-1.01** dialog and select a code (*Lookup Table ID: 1080*).

Alternatively, to remove a code, select it and click the **Remove** button.

3. Click the **Save** button.

Recording Staff Information for the Service

The Staff Information panel is used to record details of staff working at the service.

1. On the Maintain Service Provision page, select the Staff Information panel.

19. Staff Information		
Staff	Staff Description Start Date End Date Staff Type Job Title	🖶 Add
		🔝 Edit
		💥 Remove
		🛃 Details

- 2. To add a new member of staff for the service:
 - a. Click the Add button to display the Maintain Staff for Service dialog.

🛐 [Maintain Staff for	Service]		
💾 Save 🟈 Memo	' Alerts		
StaffServices			StaffServices 🔹 🕖
StaffServices			
Start Date	End Date	•	
Staff Type	Direct Involvement		
Job Title			
Staff		Q 🗙	
		e, ×	

- b. Select a Start Date.
- c. Select a Staff Type (lookup Table ID: 0429).
- d. If required, select the **Direct Involvement** check box to display a tick.
- e. If required, enter a **Job Title**.
- f. Select the **Staff** browse button to display the **Early Years Staff Enquiry** and select a new staff member.

Alternatively, to remove a staff member, highlight it and click the **Remove** button.

To edit the details, highlight the staff member and click the **Edit** button.

3. Click the **Save** button.

Displaying Additional Information for a Service

The **Additional Information** panel is used to display the additional information about a service that the Local Authority has collected from providers using the Self Update portal. These fields are defined in the One v4 Client as UDFs (User Defined Fields).

20. Additional Information				
Date Last Updated				
Costs Per Half Day - 2YR	Date1			

More Information: Common Functionality (v4 Client) handbook and Managing UDFs reference guide available on the One Publications website and on My Account.

Displaying Details of a Service Provision

- 1. Search for and select a provider to display the **Maintain Provider** page. For more information, see <u>Viewing Provider Details</u> on page *11*.
- 2. On the Maintain Provider page, select the Provider Services panel.

05. Provider Se	05. Provider Services					
	Service Type Description	Service Address	FID Type		🖶 Add	
test kser2	Breakfast Clubs		ECD		💥 Remove	
					💽 Details	

3. Select the required service and click the **Details** button to display the **Maintain Service Provision** page.

[Maintain Service Provis	ion: k]				-		
💾 Save 🔲 Data Panel	s 🔻 Alerts 💣 Sql Mail Merge 🔗	UDF Manager					
💿 🚱 01. Service Provi	sion Details 02. Registration Histor	y 03. Consent to Sh	04. Service Public Con	tact 05. Se	ervice Private Contacts	06. Vocabulary	01. Service Provisior 👻
01. Service Provision D	etails						
Service Name	Sec. 2 Sec.						
Service Type Description	Childminder -	Service ID	278				
FID Type	ECD -	Authority-wide	×				
Provider Name	n Childcare		Q X	Detai	0		
CRB Policy		Same As Providers Address	×				
Address	44 Levelde, Dranthern, Dedford, Bedfo	ard	1	\times			
Start Date	01/01/2015 💌	End Date		-			
Registered For Nursery Education Grant/Fund		Previously Funded	\checkmark				
Offers Extended Childcare	√					_	
Details of your 30 hours offer	s				^	1	
					-		
Extended Offer Ceases From	•						
OFSTED Provision Type	Childminder - Domestic Prem	•					
FISID		Telephone Number	01234 838080				
Fax Number	01234 854848						
Email Address	couk						
Website	www.inference.co.uk						
Other Information	No Pets						
	NV F GIO						

Note: A new text field called **Details of your 30 hours offer** has been added to the Service Provision Details panel. It is used to display the information that the Local Authority has collected from providers about their 30 hours offering using the Self Update portal.

Information about the service is displayed on the following panels:

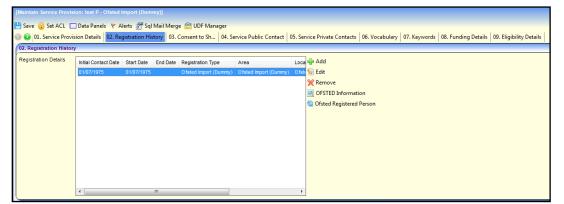
- Service Provision Details.
- Registration History.
- Consent to Share Information.
- Service Public Contacts.
- Service Private Contacts.
- Vocabulary.
- Keywords.
- Funding Details.
- Eligibility Details.
- Referral Details.
- Facility.
- Special Provision.
- Travel Information.
- Award Information.

- PPAYP Category.
- Area Covered.
- Access Channel.
- Leisure Card.
- Staff Information.
- Additional Information.
- UDFs.

Viewing Ofsted Details for a Service Provision

If a registration is linked to an imported Ofsted record, the Ofsted details can be displayed.

1. On the Maintain Service Provision page, select the Registration History tab.



- 2. Select the required **Registration Details** record. If it is linked to an Ofsted record, the **OFSTED Information** button is enabled.
- 3. Click the **OFSTED Information** button to display the **Ofsted Details** page.

Date 1502 2015 Local Adminity Name CL Local Adminity Name CL Local Adminity Name CL Updated By Vebbar Local Adminity Name Local Adminity Name Local Adminity Name R2. Proceeded List Local Adminity Name Local Adminity Name Local Adminity Name Local Adminity Name Address Line 2 DI Locel Playroup Local Adminity Name Local Adminity Name Local Adminity Name Address Line 2 DI Locel Playroup Local Adminity Name Local Adminity Name Local Adminity Name Form Address House Local Adminity Name Local Adminity Name Local Adminity Name Face Name Local Adminity Name Local Adminity Name Local Adminity Name Local Adminity Name Face Name Local Adminity Name Stream Local Adminity Name Local Name Local Name Local Nam Local Nam <th>📎 Ofsted Details [1230</th> <th>8]</th>	📎 Ofsted Details [1230	8]
Bit Date Image Dat		
Date 15622 2015 Local Admony Code 201 Local Admony Code 201 Local Admony Code 201 Update By Vebbar Local Admony Code 201 Developmentation Envolved Local Admony Code 201 Address Line 2 Di Level Playroup Local Admony Code Local Admony Code Address Line 2 Di Level Playroup Local Admony Code Local Admony Code Post Code Meteros Postoate Local Admony Code Local Admony Code Feelo Res Notae Image Postoate Image Postoate Image Postoate Konsent Image Postoate Image Postoate Image Postoate Image Postoate Konsent Image Postoate Image Postoate Image Postoate Image Postoate Image Postoate Konsent Image Postoate Image Postoate<	01. Extract Details	s 02. Provider Details 03. Setting Details 04. Registration Details 05. Registration 06. Child Services History 07. Certificate 08. Childcare Age History 09. Childcare Period History 10. Inspection 11. Notice History 12. Welfare History
Date 15622 2015 Local Allmonty Code 201 Local Allmonty Name CL CL <td< th=""><th>01. Extract Details</th><th></th></td<>	01. Extract Details	
Load Adventy Name CL Update By Value Reference Musice Image Postcode Advenses Line 1 Bolicon Playmoon Torm Advenses House Control Image Postcode Torm Advenses House Control Image Postcode Advenses House Image Postcode Control Image Postcode Reference Musice Image Postcode Reference Musice Image Postcode Reference Musice Image Postcode State Dotted Image Postcode Reference Musice Image Postcode Contry Image Postcode <th>Date</th> <th>16/02/2016 Local Authority Code 201</th>	Date	16/02/2016 Local Authority Code 201
Approvide Detail Constrained Detail Constrain	Local Authority Name	
Approvide Detail Constrained Detail Constrain		
Name bot P Address Line 1 Babican Raygoup Address Line 2 01 Level Raygoup Town Address House County	Updated By	Vaibhav
Name bot P Address Line 1 Babican Raygoup Address Line 2 01 Level Raygoup Town Address House County		
Address Line 1 Babican Raygroup Address Line 2 01 Level Raycom Tonn Address House County	02. Provider Details	
Address Line 2 Designed Address Line 2 Dirigine Postode Reference Number 0 Telephone Number 0 Telephone Number 0 Sole Number 0 Genery Virtuel 0 Sole Strange Postode Reference Number 0 Genery Virtuel 0 Sole Strange Postode Reference Number 0	Name	test P
Address Line 2 Designed Address Line 2 Dirigine Postode Reference Number 0 Telephone Number 0 Telephone Number 0 Sole Number 0 Genery Virtuel 0 Sole Strange Postode Reference Number 0 Genery Virtuel 0 Sole Strange Postode Reference Number 0		
Town Addrews House County	Address Line 1	Barbican Playgroup
Town Addrews House County	Address Line 2	
County Image Postocode Post Code Image Postocode Post Code Image Postocode Omeree Number Image Postocode Verk Number Image Postocode Fax Number Image Postocode Sax Number Image Postocode Address Line 2 Barbican Sax Number Image Postocode Contry Image Postocode Post Code Image Postocode	Audress Line 2	U Leve Payroom
County Image Postocode Post Code Image Postocode Post Code Image Postocode Omeree Number Image Postocode Verk Number Image Postocode Fax Number Image Postocode Sax Number Image Postocode Address Line 2 Barbican Sax Number Image Postocode Contry Image Postocode Post Code Image Postocode	Town	Andrease Hours
Post Code Unique Post code Reference Number 0 Telephone Number 0 Mobie Number 0 Sex Number 0 Email 0 Consort Windel 0 Sexting Details 0 Address Line 2 Email Consort Vindel Town 0 County 0 Post Code Unique Post code Reference Number		
Reference Number Reference Number Mobile Number	-	
Mobile Number		Reference Number
Work Number		No. And Annual
Fax Number		
Email Image: Consent Wined Consent Wined Image: Consent Wined Stating Details Image: Consent Wined Stating Details Image: Consent Wined Address Line 1 Evel 01 and 02, Andrewes House Address Line 2 Barbican Town Image: Consent Wined County Image: Consent Wined Psit Code Unique Postcode Reference Number 0	Work Number	
Consert Witheld	Fax Number	
20. Setting Details 20. Setting Details 20. Setting Details 20. Setting Details Address Line 1 Level 01 and 02, Andrewes House Address Line 2 Barbican Town County Past Code Unique Postscode 0	Email	
Address Line 2 Even 01 and 02, Andrewes House Address Line 2 Barboan Town County Past Code Unique Postcode 0 Reference Number 0	Consent Witheld	
Address Line 2 Eved 01 and 02, Andrewes House Address Line 2 Barboan Town County Past Code Unique Postcode 0 Reference Number 0	02 Setting Details	
Address Line 1 Level 01 and 02, Andrewes House Address Line 2 Barbacan Town County Past Code Unique Postcode Reference Number		ket Seri
Address Line 2 Barbican Town County Post Code Unique Postcode 0 Reference Number		Not de l
Address Line 2 Barbican Town County Post Code Unique Postcode 0 Reference Number		
Town County Post Code Unique Postcode 0 Reference Number	Address Line 1	Level 01 and 02, Andrewes House
Town County Post Code Unique Postcode 0 Reference Number		
County Post Code Unique Postcode 0 Reference Number	Address Line 2	Barbican
County Post Code Unique Postcode 0 Reference Number		
Post Code Unique Postcode 0 Reference Number		handa
Reference Number	County	
	Post Code	Unique Postode 0 Reference Number
Telephone Number	Telephone Number	
Mobile Number	Mobile Number	
Work Number	Work Number	
Fax Number	Fax Number	

Viewing Services that have sent FID Data

If the provider consents to share information about the service, the **Consent to Share Information** panel displays details of the type and dates when extracts of data have been sent.

1. On the Maintain Service Provision page, select the Consent to Share Information tab.

03. Consent to Share	Information				
OFSTED Consent Withheld			Publish to Local Internet		
OFSTED Special Considerations		*	Base Active Status	\checkmark	
Publish to FID			Publish to FID Date Changed		
Provider Signature Received			Non-Consent Reason	•	
Non-Consent Notes					
ECD Sent - Owner 1		-	FSD Sent - Owner 1		
ECD Sent - Owner 2		-	FSD Sent - Owner 2		
Publish Telephone Numbers?	×		Publish Address	×	
Publish Cost Information	×		Telephone	×	
In Writing	×		Mailouts	×	

FID data can be sent to one or two locations (Owner 1 and Owner 2). The dates when ECD and FSD extracts of data were last sent to one or both locations is displayed as follows:

- ECD Sent Owner 1
- ECD Sent Owner 2
- FSD Sent Owner 1
- FSD Sent Owner 2.

Searching for a Service Provision

An Early Years provider can have one or more service provisions e.g. Breakfast Club, Full Day Care or Holiday Club. To search for a service provision:

1. Select Focus | Early Years | Search Service Provision to display the Search Service Provision page.

Search Service Provision			X
👫 Search [🔁 Collapse	🕶 🔄 Clear		
Service Provision Enqu	ıiry		
Provider Name			
Service Name			
Service Type Description		•	
Service Coverage	All	•	
Service Postcode		Registered	\checkmark
Reference Number		DCSF URN	
Status	Open 🗸	Funded Status	All 🔹
Locality	•	Area	·
Ward	•	FID Type	•
Payment Band		Stretched Offer(s)	

- 2. Enter one or more search criteria as follows:
 - a. Enter a full or partial **Provider Name**.

- b. Enter a full or partial Service Name.
- c. Select a Service Type Description.
- 3. If required, enter further search criteria as follows:
 - a. Enter a Service Postcode.
 - b. Deselect the Registered check box.
 - c. Enter a Reference Number.
 - d. Enter a DCSF URN.
 - e. Select a Status.
 - f. Select a Funded Status.
 - g. Select a Locality (Lookup Table ID: 0471).
 - h. Select an Area (Lookup Table ID: 0471).
 - i. Select a Ward (Lookup Table ID: 0802).
 - j. Select an FID Type.
 - k. Click the browse button to select a Payment Band (Lookup Table ID: 1161).
 - I. Click the browse button to select a Stretched Offer (Lookup Table ID: 1178).
- 4. Click the **Search** button to display a list of services.

Managing the Communication Log

The communication log is used to record details of communications sent or received by an Early Years provider or a service provision.

Logging a New Communication

A new communication can be logged for a provider or a service. To log a new communication for a provider or service:

- 1. Search for a provider via Focus | Early Years | Search for a Provider. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

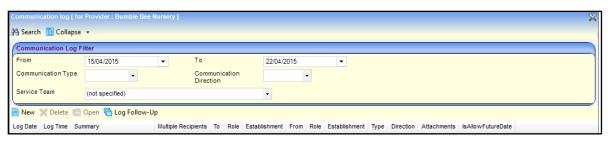
[Maintain Provider: Bun		0.0	🕀 Links
[Maintain Provider: Bun	IDIE BEE NUISERYJ	×	- Links
💾 Save 📄 New 🚫 N	1emo 🌐 Set ACL 🔲 Data Panels 🛛 🕸 Alerts 📷 Sql Mail Merge 🚔 UDF Manager		
O1. Basic Details	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details -	8	Links
01. Basic Details			Communication Log
Provider Name	Bumble Bee Nurserv		Complaints Income
			Job Vacancies
Entity Type	Base General Revise		Links
	Person		Monitoring
	Establishment		Provider Census
Provider ID	50007 Base URN		Reports
Provider Entity	Bumble Bee Nursery 🔍 📉 Detail		V3 Contact Log
Address		E	
Email	test@madeupsite.com		
Website			
Telephone	Fax Fax		
Opening Date	01/01/2001		
Closure Reason			
Closing Date	Creditor Reference G1234		
Insurer			
Parent Provider	e, ×		
Premises Type			
Premises Type	•		

Alternatively, search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page 42.

Highlight the required service in the list and click the **Open in New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provisi		×	🕀 Links
💾 Save 🔲 Data Panels	🝸 Alerts 👸 Sql Mail Merge 😭 UDF Manager		
💿 📀 01. Service Provis	ion Details 02. Registration History 03. Consent to Sh 04. Service Public Contact 05. Service Private Contacts 06. Vocabulary 01. Service Provision -	1	Links Availability and Capacity
01. Service Provision De	tails		Communication Log
Service Name			Complaints
		Ξ	Job Vacancies
Service Type Description	Childminder Service ID 278		Monitoring Service Charges
FID Type	ECD - Authority-wide		
Provider Name	Childcare Q X Detai		
CRB Policy	Same As Providers X Address		
Address	44 karanteen Beetherd, Beethord 🏠		
Start Date	01/01/2015 End Date		
Registered For Nursery Education Grant/Fund	V Previously Funded V		
Offers Extended Childcare	\checkmark		
Details of your 30 hours offer			
Extended Offer Ceases From	×		
OFSTED Provision Type	Childminder - Domestic Prem -		
FISID	Telephone Number 01234 838080		
	01234 854848		
Email Address			
Website	www.iminia.couk		
Other Information	No Pets		

3. Select the **Communication Log** link on the **Links** panel to display the **Communication Log Filter** panel.



4. Click the New button to display the Communication log details page.

Communication log [for Provider : Bumble Bee Nursery] details [New]							
💾 Save 🛛 👻 Alerts 👸 Sql Mail Merge							
🐼 🐼 1. Basic Detail	1. Basic Detail	• 1					
1. Basic Detail							
Type Direction Continue							

- 5. Select a **Type** from the drop-down.
- 6. Select a **Direction** from the drop-down.
- 7. Click the Continue button to display the Communication for page.

For more information, see <u>Logging a New Email</u> on page 45, <u>Logging a New Telephone Call</u> on page 46 or <u>Logging a New Letter or Fax</u> on page 47.

Logging a New Email

- 1. Search for a provider or a service and click the **Communication Log** link on the **Links** panel.
- 2. Click the **New** button to display the **Communication log** details page.
- 3. Select Email from the Type drop-down.
- 4. Select a **Direction** from the drop-down.
- 5. Click the **Continue** button to display the **Communication for** page.

Communication for Las	ServiceProviderDetail: N	laintain Service Provision: E	umble Bee Nursery - Full Day Care details [New]	×
💾 Save 😽 Set ACL 🕚	🕈 Alerts 🛛 Sql Mail M	lerge		
🔇 💿 🛛 1. Basic Detail	2. Communication Su	mmary 3. Memo 4. Subj	ects/From/To 5. Email Detail 6. Response Detail	1. Basic Detail 👻 🖉
1. Basic Detail				^
Туре	Email 🔹	Direction	Inbound 👒]_
2. Communication Su	mmary			
Log Date	12/05/2015	✓ Log Time	13:27	
Summary				
				=
Category		 Priority 	None 👻	

- 6. On the **Communication Summary** panel:
 - a. Select a Log Date.
 - b. Enter a Log Time.
 - c. Enter a Summary.
 - d. If required, select a Category from the drop down (Lookup Table ID: 0427).
 - e. If required, select a Priority.
- 7. If required, select the Memo tab and enter a memo.
- 8. Select the **Subjects/From/To** tab.

🔇 💿 1. B	asic Detail	2. Comm	unication Summ	ary 3. Memo	4. Subjects/F	rom/To	5. Email Detail	6. Response Detail	4. Subjects/From/	/To 👻
4. Subject	s/From/To									
Subjects										
Family Na	me Given I	Name Cho	sen Family Name	Chosen Given N	ame Gender	Date of Bin	th		💥 Rei	move
									🔒 De	etails
From	Ar	nonymous								
Name R	ole Establi	shment							🖶 Ad	bb
									S Ed	lit
									💥 Rei	move
									🔒 De	atails
То										
Name R	ole Establis	shment							🖶 Ad	bb
									🔊 Ed	lit
										move
									🔒 De	etails
CC - Reci	ipients									
Name R	ole Establis	shment							de Ad	
									S Ed	
										move
									🔒 De	etails

- 9. Click the **Add** button to display the **Person Enquiry** dialog and select the required person, base or role.
- 10. Select the Email Detail tab.

5. Email Detail		
Subject	*	
Do to	Ŧ	
Body	^ ^	

- 11. Enter the **Subject** and **Body** of the email.
- 12. Click the **Save** button.

Logging a New Telephone Call

- 1. Search for a provider or a service and click the **Communication Log** link on the **Links** panel.
- 2. Click the New button to display the Communication log details page.
- 3. Select **Telephone** from the **Type** drop-down.
- 4. Select a **Direction** from the drop-down.
- 5. Click the **Continue** button to display the **Communication for** page.

2. Communication Summary								
11/03/2014	•	Log Time	13:30					
00:00								
	•							
	11/03/2014	11/03/2014	11/03/2014 Log Time					

- 6. On the Communication Summary panel:
 - a. Select a Log Date.
 - b. Enter a Log Time.
 - c. Enter a Duration.
 - d. Enter a Summary.
 - e. If required, select a Category from the drop down (Lookup Table ID: 0427).
- 7. Select the Subjects/From/To tab.
- 8. Click the **Add** button to display the **Person Enquiry** dialog and select the required person, base or role.
- 9. Click the **Save** button.

Logging a New Letter or Fax

- 1. Search for a provider or a service and click the **Communication Log** link on the **Links** panel.
- 2. Click the **New** button to display the **Communication log** details page.
- 3. Select Letter or Fax from the Type drop-down.
- 4. Select a **Direction** from the drop-down.
- 5. Click the **Continue** button to display the **Communication for** page.
- 6. On the **Communication Summary** panel:
 - a. Select a Log Date.
 - b. Enter a Log Time.
 - c. Enter a Summary.
 - d. If required, select a Category from the drop down (Lookup Table ID: 0427).
- 7. Select the Subjects/From/To tab.
- 8. Click the **Add** button to display the **Person Enquiry** dialog and select the required person, base or role.
- 9. Select the Letter Details tab.

5. Letter Details			
Receive/Sent Date	-	Letter Date	
Print Date	-	Letter Reference	

- 10. Select a Receive/Sent Date.
- 11. If required, select a Letter Date, Print Date and Letter Reference.

12. Click the **Save** button.

Searching for a Logged Communication

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Burr	nbie Bee Nursery]	×	🐳 Links
💾 Save 📄 New 🔿 N	Aemo 🔓 Set ACL. 🔲 Data Panels 🔻 Alerts 💣 Sql Mail Merge 🚔 UDF Manager		
	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details -	3	Links
01. Basic Details		_	Communication Log
Provider Name	Bumble Bee Nursery		Complaints
Entity Type			Job Vacancies
Linky Type	Base Revise Person		Links
	Establishment		Monitoring
Provider ID	50007 Base URN		Provider Census
Provider Entity			Reports
	Bumble Bee Nursery O, X 🔟 Detail		V3 Contact Log
Address	inani ini jami ini jahaj 🗠 🔿	Е	
Email	test@madeupsite.com		
Website			
Telephone	Fax Bible Televille		
Opening Date	01/01/2001 -		
Closure Reason	•		
Closing Date	Creditor Reference G1234		
Insurer			
Parent Provider	e, x		
Premises Type			
Premises Type	· · ·		

Alternatively, search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page 42.

Highlight the required service in the list and click the **Open in New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provision: k]	×	🕀 Links
💾 Save 🔲 Data Panels 🦞 Alerts 👸 Sql Mail Merge 🚔 UDF Manager		
💿 😥 01. Service Provision Details 02. Registration History 03. Consent to Sh 04. Service Public Contact 05. Service Private Contacts	06. Vocabulary 01. Service Provisior - 🔗	Links
01. Service Provision Details	· · · · · · · · · · · · · · · · · · ·	Availability and Capacity Communication Log
Service Name		Complaints
	=	Job Vacancies
Service Type Childminder Service ID 278		Monitoring Service Charges
FID Type ECD - Authority-wide 🗙	-	
Provider Name Childcare 🔍 🗡 🔟 Detail		
CRB Policy Same As Providers X Address		
Address 44 Levide, Beatled, Bedford		
Start Date 01/01/2015 End Date		
Registered For Nursery 🗸 Previously Funded 🗸 Education Grant/Fund		
Offers Extended ✓ Childcare		
Details of your 30 hours offer		
Extended Offer Ceases		
OFSTED Provision Childminder - Domestic Prem		
FISID Telephone Number 01234 838080		
Fax Number 01234 854848		
Email Address co.uk		
Website www.initial.co.uk		
Other Information No Pets		

3. Select the **Communication Log** link on the **Links** panel to display the **Communication Log Filter** panel.



By default, the To date is set to the current date and the From date is set to one week earlier.

- 4. If required, enter search criteria by selecting from the following drop-downs:
 - From date
 - To date
 - Communication Type
 - Communication Direction
 - Service Team.
- 5. Click the **Search** button to display a list of logged communications.

Managing Complaints

Complaints made about a provider or service can be recorded.

Adding a New Complaint

1. Open the **Complaints** page for a provider or a service. For more information, see <u>Viewing</u> <u>Complaints for a Provider</u> on page 50 or <u>Viewing Complaints for a Service</u> on page 51.

							×
	💾 Save						
l	🗿 💿 01. Comp	laints			01. Complain	its 👻	1
I	01. Complaints						
I	Complaint Date	Туре	Complainant	Outcome	Time Spent	🖶 Add	
I		Too many children			0 Day(s) 0 Hr(s) 0 Min(s).	🕤 Edit	
I						💥 Remov	re

2. Click the Add button to display the Complaint Details page.

Complaints Details	
💾 Save 🚔 UDF Manager	
So D1. Complaints 02. Appeals User Defined Fields	01. Complaints 🔹 🥖
01. Complaints	
Complaint Date 02/04/2015]
Туре	
Complainant Summary	
Action	
Outcome Complaint Memo	
Action Memo	ļ
02. Appeals	
Appeal To LA Date	
Appeal To LA Outcome	
Appeal To Law Date	
Time Spent 0 👘 Day(s) 00:00 🖨 Hr(s)-Min(s)	
Appeal Memo	
User Defined Fields	
r Complaint	
Complaint	

- 3. On the Complaints panel, select a Type from the drop-down (Lookup ID: 0476).
- 4. If required, click the browse to display the **Person Enquiry** dialog and select a **Complainant Summary**.
- 5. If required, select an Action from the drop-down (Lookup Table ID: 0477).
- 6. If required, select an **Outcome** from the drop-down (*Lookup Table ID:1143*).
- 7. If required, click the **Complaint Memo** button or **Action Memo** button to record a corresponding memo.
- 8. If required, enter appeal details on the Appeals panel:
 - a. Select an Appeal To LA Date.
 - b. Select an Appeal To LA Outcome date.
 - c. Select an Appeal To Law Date.
 - d. Select an Appeal To Law Outcome date.
 - e. Click the Appeal Memo button to enter a memo.
- 9. If required, enter User Defined Details.
- 10. Click the **Save** button.

Viewing Complaints for a Provider

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page *9*.
- 2. Highlight the required provider or service in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Bun	nhle Ree Nursend	X	Cinks
		~	Links
	Aemo 😌 Set ACL 🔲 Data Panels 👻 Alerts 👸 Sql Mail Merge 🚔 UDF Manager		Links
O1. Basic Details	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details 🔹	1	Communication Log
01. Basic Details		^	Complaints
Provider Name	Bumble Bee Nursery		Income
Entity Type	Base Base Base		Job Vacancies
	Person		Links
	C Establishment		Monitoring Provider Census
Provider ID	50007 Base URN		
Provider Entity	Bumble Bee Nursery Q X 🔟 Detail		V3 Contact Log
Address			v5 contact bog
		E	
Email	test@madeupsite.com		
Website			
Telephone	Fax But Terran		
Opening Date	01/01/2001 👻		
Closure Reason			
Closing Date	Creditor Reference G1234 Number		
Insurer	numper		
Parent Provider	Q, X		
Premises Type			
riomises type	·		

3. Click the **Complaints** link on the **Links** panel to display the **Complaints** page.

С	omplaints							×
E	Save	laints				01. Complaints	•	1
(01. Complaints							
	Complaint Date	Туре	Complainant	Outcome	Time Spent		🖶 Add	
	07/04/2015	Too many children			0 Day(s) 0 Hr(s) 0 Min(s).		🕥 Edit	
							💥 Remo	ve

Viewing Complaints for a Service

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provisi	an: N	🔀 🕀 Links
💾 Save 🔲 Data Panels	🕐 Alerts 💣 Sql Mail Merge 🚔 UDF Manager	
💿 😥 01. Service Provis	ion Details 02. Registration History 03. Consent to Sh 04. Service Public Contact 05. Service Private Contacts 06. Vocabulary 01. Service Provision 🗸 🌮	Links Availability and Capacity
01. Service Provision D	tails	Communication Log
Service Name		Complaints
		Job Vacancies Monitoring
Service Type Description	Childminder Service ID 278	Service Charges
FID Type	ECD - Authority-wide X	
Provider Name	Childcare 🔍 X 🔟 Detail	
CRB Policy	Same As Providers 🗙 Address	
Address	44 Laguida, Brantan, Balfard, Bedford 🏠 🗙	
Start Date	01/01/2015 End Date	
Registered For Nursery Education Grant/Fund	V Previously Funded V	
Offers Extended Childcare	v	
Details of your 30 hours offer		
Extended Offer Ceases From		
OFSTED Provision Type	Childminder - Domestic Prem ·	
FISID	Telephone Number 01234 838080	
	01234 854848	
Email Address	en e	
Website	www.the dise couk	
Other Information	No Pets	

3. Click the **Complaints** link on the **Links** panel to display the **Complaints** page.

С	omplaints							⋈
E	- Save							
¢	🗿 🕗 01. Compl	laints			01	I. Complaints	-	1
1	01. Complaints							
	Complaint Date	Туре	Complainant	Outcome	Time Spent	4	🚽 Add	
		Too many children			0 Day(s) 0 Hr(s) 0 Min(s).	1	Edit	
						3	🖹 Remov	e

Managing Income

The income for an Early Years provider can be recorded.

Adding Income for a Provider

1. Open the **Income** page for a provider. For more information, see <u>Adding Income for a Provider</u> on page *52*.

Income [for Provider : Nursery]								
Save Save	comes					01. Incomes	• 1	
Due Date	Income Code	Amount	Receipt Date	Receipt Amount	Provider Name		🖶 Add	
01/01/2000	Registration Fee	15.00		0.00	Markin File Nursery		🔝 Edit 💥 Remove	

2. Click the **Add** button to display the **Income Details** page.

N Income Details	_	_	_	
💾 Save				
🔇 💿 01. Income Detai	ls 02. Receipt Details			01. Income Details 👻 🚀
01. Income Details				
Income Code	-	Amount		
Due Date	•	-		
02. Receipt Details				
Receipt No		Receipt Type	Not Specified -	
Receipt Amount				
Income Note				2
				C ¹
				B
				>>
Receipt Date	•	Receipt Printed		
Bank Slip No		Bank Slip Date		•
Last Updt		-		
Updated By				

- 3. Select an Income Code.
- 4. Enter an Amount.
- 5. Select a **Due Date**.
- 6. If required, enter Receipt Details:
 - a. Enter a Receipt No.
 - b. Select a Receipt Type.
 - c. Enter a Receipt Amount.
 - d. Enter an Income Note.
 - e. Select a Receipt Date.
 - f. Select a Bank Slip Date.
- 7. Click the **Save** button.

Viewing Income for a Provider

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider or service in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Bun	ble Bee Nursery]	×	🕀 Links
💾 Save 📄 New 🚫 N	emo 🄓 Set ACL 🔲 Data Panels 🛛 Alerts 💏 Sql Mail Merge 🚔 UDF Manager		
	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details 🔹	8	Links
01. Basic Details		-	Communication Log Complaints
Provider Name	Bumble Bee Nursery		Income
Entity Type	Base Base		Job Vacancies
	Person		Links
	Establishment		Monitoring
Provider ID	50007 Base URN		Provider Census
Provider Entity			Reports
Address			V3 Contact Log
		Ε	
Email	test@madeupsite.com		
Website			
vvebsite			
Telephone	Fax Patricia		
Opening Date	01/01/2001		
Closure Reason	·····		
Closing Date			
Growing Date	Creditor Reference G1234 Number		
Insurer			
Parent Provider	Q, X		
Premises Type			

3. Click the **Income** link on the **Links** panel to display the **Income** page.

Income [for Provider : Nursery]		\$
Save Save Save Save Save Save Save Save	01. Incomes	• /
01. Incomes		
Due Date Income Code Amount Receipt Date Receipt Amount Provider Name		🖶 Add
01/01/2000 Registration Fee 15.00 0.00 Registration Fee 15.00		🕥 Edit
		💥 Remove

Managing Job Vacancies

Job vacancies for a provider or a service provision can be recorded.

Adding a Job Vacancy

- 1. Open the **Job Vacancies** page for a provider or a service. For more information, see <u>Viewing</u> <u>Job Vacancies for a Provider</u> on page *56* or <u>Viewing Job Vacancies for a Service</u> on page *56*.
- 2. Click the Add button to display the Job Vacancies page.

🕥 Job Vacancies				
💾 Save				
🌀 💿 01. Job Vacancy [etails 02. Job Category			01. Job Vacancy Det 👻 🥖
01. Job Vacancy Details				
Job Title				
JobDescription				9
				6
				B
				»
Start Date	•	Position Closed	×	
Area	•	Locality	•	
Employment Type	•	Salary Type	Not Set 🗸	
Salary Range From		Salary To		
Experience		Experience Type	Not Set 👻	
Charge Group	-			
02. Job Category				
Early Education Type		-		
ChildCare & Playwork		-		
Community Work		-		
Support Services		-		
Childcare Tutor/Trainer	×			

- 3. Enter a Job Title.
- 4. If required, enter the following:
 - a. Job Description.
 - b. Start Date.
 - c. Salary Range.
 - d. Select the Area (Lookup Table ID: 0471).
 - e. Select the Locality (Lookup Table ID: 0470).
 - f. Select the Employment Type (Lookup Table ID: 0815).
 - g. Select Salary Type from the drop-down.
 - h. Select the Charge Group (Lookup Table ID: 0800).
- 5. If experience is required for this job vacancy, enter the number and select **Weeks**, **Months** or **Years** from the **Experience Type** drop-down.
- 6. If required, enter the following details on the Job Category panel:
 - a. Select an Early Education Type (Lookup Table ID: 0811).
 - b. Select a Childcare & Playwork category (Lookup Table ID: 0812).
 - c. Select a Community Work category (Lookup Table ID: 0813).
 - d. Select a Support Services category (Lookup Table ID: 0814).
 - e. If the vacancy is for a childcare tutor or trainer, select the **Childcare Tutor/Trainer** check box to display a tick.
- 7. Click the **Save** button.

Viewing Job Vacancies for a Provider

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page *9*.
- 2. Highlight the required provider or service in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Bun	bie Bee Nursery]	Cinks
💾 Save 📄 New 🚫 N	ferno 🔓 Set ACL 🗖 Data Panels 🖤 Alerts 📅 Sql Mail Merge 🚔 UDF Manager	
	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details 🔍 🌮	Links
01. Basic Details		Communication Log Complaints
Provider Name	Bumble Bee Nursery	Income
Entity Type	Base Base Base	Job Vacancies
	Person	Links
	Establishment	Monitoring Provider Census
Provider ID	5007 Base URN	Reports
Provider Entity	Bumble Bee Nursery 🔍 📉 Detail	V3 Contact Log
Address		
Email	test@madeupsite.com	
Website		
Telephone	Fax Profestion	
Opening Date	01/01/2001 👻	
Closure Reason	•	
Closing Date	Creditor Reference G1234 Number	
Insurer		
Parent Provider	Q X	
Premises Type		
		1

3. Click the Job Vacancies link on the Links panel to display the Job Vacancies page.

Job Vacancies [for Provider : Bumble Bee Nursery]							
	E Save	01. Job Vacancies 🔹 🖌					
1	01. Job Vacancies						
	Start Date Job Title Locality Area Status	Hereit Add					
		X Remove					

Viewing Job Vacancies for a Service

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provis	ion: [k]						⋈	🥺 Links
💾 Save 🔲 Data Panels	🛛 🖤 Alerts 🎢 Sql Mail Merge 🔗	UDF Manager						
O1. Service Provis	sion Details 02. Registration History	03. Consent to Sh	04. Service Public Contact 05.	Service Private Contacts	06. Vocabulary	01. Service Provisior -	1	Links Availability and Capacity
01. Service Provision D	etails						-	Communication Log
Service Name	land in the second s]				Complaints
							Ε	Job Vacancies
Service Type Description	Childminder -	Service ID	278					Monitoring Service Charges
FID Type	ECD -	Authority-wide	×					
Provider Name	Childcare		🔍 🗙 🔟 Det	ail				
CRB Policy		Same As Providers Address	×					
Address	44 Layaida, Dramham, Dadford, Bedfo	<u>rd</u>	🟫 🗙					
Start Date	01/01/2015 👻	End Date	•					
Registered For Nursery Education Grant/Fund	✓	Previously Funded	~					
Offers Extended Childcare	\checkmark							
Details of your 30 hours offer				•				
Extended Offer Ceases From	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1							
OFSTED Provision Type	Childminder - Domestic Prem	-						
FISID		Telephone Number	01234 838080					
Fax Number	01234 854848							
Email Address	couk							
Website	www.infrant.co.uk							
Other Information	No Pets			•				

3. Click the **Job Vacancies** link on the **Links** panel to display the **Job Vacancies** page.

J	ob Vacancies [for Provider : Bumble Bee Nursery]	×
	Save 3 0 01. Job Vacancies 01. Job Vacancies	ancies 🗸 🖌
ſ	01. Job Vacancies	
	Start Date Job Title Locality Area Status	Here Add

Managing Links

Receiver bases, membership of national groups and representatives for a childcare provider can be displayed and updated using the **Links** page.

Viewing Links for a Provider

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Bum	ble Bee Nursery]	×	🎨 Links
💾 Save 📄 New 🔿 N	lemo 🄓 Set ACL 🔲 Data Panels 🦞 Alerts 💏 Sql Mail Merge 🚔 UDF Manager		
		8	Links
01. Basic Details		1	Communication Log Complaints
	Bumble Bee Nursery		Income
			Job Vacancies
	Base Person		Links
	Establishment		Monitoring
Provider ID			Provider Census
			Reports
Provider Entity	Bumble Bee Nursery 🔍 X 🛄 Detail		V3 Contact Log
Address		Ξ	
Email	test@madeupsite.com		
Website			
1 CLONE			
Telephone	Fax Boot Terrat		
Opening Date	01/01/2001 •		
Closure Reason	······		
Closing Date			
Sissing Duto	Creditor Reference G1234 Number		
Insurer			
Parent Provider	Q ×		
Premises Type			

3. Click the Links link on the Links panel to display the Links page.

Links [for Provider : Nursery]	×
The Save	
Marceivers 02. Membership 03. Representative Details	01. Receivers 👻 🖌
01. Receivers	
Receiver Name	🖶 Add
	🗶 Remove
02. Membership	
Group's Name	🖶 Add
	💥 Remove
03. Representative Details	
Partnership Q X 8	
Dsitrict Forum 🔍 🔍 🕺	
Link Group 🔍 🗙 💈	

Selecting a new Receiver for a Provider

- 1. Open the **Links** page for a provider. For more information, see <u>Viewing Links for a Provider</u> on page *57*.
- 2. On the **Receivers** panel, click the **Add** button to display the **Base Enquiry** dialog.

Base Enquiry	_		
👫 Search [🖻 Collapse	•		
Base Enquiry			
Name]
Base Type	- Activ	ve 🗸	
Base Selection	All Assessment Stages - Scho	ool No.	
URN			J
Select All 🛷 Select	📄 New 💥 Delete 📰 Open 💼 Open 1	In New Window 🕀 Next Previous	

- 3. Enter one or more search criteria and click the **Search** button:
 - a. A full or partial base Name.
 - b. Select a Base Type.
 - c. Select an option from the **Base Selection** drop-down.
 - d. A full or partial School No.
 - e. A full or partial URN.
- 4. Highlight the required base in the results list and click the **Select** button.

Alternatively, click the **New** button to record a new base.

5. Click the **Save** button.

Updating Memberships for a Provider

Membership of national groups is displayed on the **Membership** panel. A new membership can be added or an existing membership can be removed.

Open the **Links** page for a provider. For more information, see <u>Viewing Links for a Provider</u> on page *57*.

02. Membership	
Group's Name	Add
West Bedford Group	Remove

To add a new membership:

- 1. On the **Membership** panel, click the **Add** button to display the **National Members Enquiry** dialog.
- 2. If required, enter a full or partial **Name**.
- 3. Click the **Search** button to display a list of national groups.

National Members Enquiry	
👫 Search 🔁 Collapse 👻	
01. Group Member	
01. Group Member Name]
🖌 Select 📄 New 💥 Delete 📩 Open In New Window	
Name	
ford Group	
ane	
ford	
Consortium Broup 1	
G Records Found	۲ .
o Records Found	.::

- 4. Highlight the required group in the results list and click the **Select** button.
- 5. Alternatively, click the **New** button to record a new group.
- 6. Click the Save button.

Removing a Membership

To remove a membership:

- 1. On the **Membership** panel, highlight the required group.
- Click the **Remove** button to display the confirmation message: Do you really want to remove the selected record?
- 3. Click the **Yes** button.
- 4. Click the **Save** button.

Updating Representatives for a Provider

Representatives on particular groups and forums are displayed on the **Representative Details** panel. A new representative can be selected, or an existing representative can be removed.

- 1. Open the **Links** panel for a provider. For more information, see <u>Viewing Links for a Provider</u> on page 57.
- 2. Select the **Representative Details** panel.

Partnershin	<u>a</u> v (
rannorship	V V V
Dsitrict Forum	0 🗙

- 3. To select a new **Partnership**, **District Forum** or **Link Group** representative:
 - a. Click the browse button to display the **Person Enquiry** dialog.

😂 Person Enquiry					
🏦 Search 🖹 Collapse	🛨 🔄 Clear				
Person Enquiry					
Name					
'Sounds Like' Search	×	Include Name History	×		
Gender	Not Specified -	Date of Birth		-	
Person ID		National Health Service Number			
	-	-			
Active	\checkmark	Deceased	Not Specified	•	
Postcode		Age Range	Not Specified	-	
Base Name			Q	×	
Role				X	
				-	
🖉 Select 📄 New 📰 🤇	Open 🖶 Next 👚 Previous				

- b. Enter search criteria and click the **Search** button to display a list of people who match the criteria.
- c. Select the required person and click the **Select** button.

Alternatively, click the **New** button to record a new person.

- d. Click the Save button.
- 4. To remove a representative:
 - a. Click the Clear button.
 - b. Click the Save button.

Managing Monitoring

Monitoring information for a childcare provider or service can be recorded.

Adding Monitoring Details

- Open the Monitoring page for a provider or a service. For more information, see <u>Viewing</u> <u>Monitoring Information for a Provider</u> on page 63 or <u>Viewing Monitoring Information for a Service</u> on page 63.
- 2. Click the New button to display the Monitoring Details page.

	Monitoring Details							\$
Øt. Monitoring Details Monitoring Ref. Monitoring Type Monitoring Dutation Øt. Monitoring Dutation Øt. Bede Nietk Monitoring Dete Nietk Monitoring Dete Nietk Monitoring Øt. Monitoring Dutation Øt. Monitoring Dutation Øt. Monitoring Ottocene	💾 Save 📄 New Y Al	lerts 🔮 UDF Manager						
Monitoring Type Monitoring Type Monitoring Type Monitoring Dutation Depy(s) 00.00 # Hr(s)-Min(s) Monitoring Ottocre Monitoring Ottocre Monitoring Ottocre Monitoring Ottocre Date of Next Monitoring Computery Monitoring Ottocre Computery Monitoring Memo Computery Memo Comput	🕥 💿 01. Monitoring D	etails 02. Monitoring Outco	omes 03. Future Improvement	ts 04. Actions User Defined	Fields		01. M	lonitoring Details 👻 🥖
Monitoring Type Monitoring Date Monitoring Date Monitoring Dutation Depry(s) 00 00 #tr(s)-Min(s) Monitoring Offlee Date Report Recorded Action Plan Deadline Cerrificate No. Cerrificate No. Conditioning Memo Conditioning Memo Conditioning Memo Cerrificate No. Cerrificate No. Cerri	01. Monitoring Details							
Monitoring Duration Monitoring Duration Ide of Next Monitoring Date Report Recorded Ide of Next Monitoring Ide of Next Monitoring <td< td=""><td>Monitoring Ref.</td><td></td><td></td><td></td><td></td><td></td><td></td><td>1</td></td<>	Monitoring Ref.							1
Montoring Duration Montoring Otice Montoring Montori	Monitoring Type		•					
Monitoring Outcome Monitoring Office Date Report Recorded Action Plan Deadline Certificate No. Monitoring Outcome Computsory Outld Care Register Met Monitoring Description 05. Future Improvements Improvement Detals Center Action Manual Complexity Oblind Care Action Manual Care Monitoring Uteron Monitoring Outcome Monitoring Description Monitoring Uteron Monitoring Outcome Monitoring Description Monitoring Outcome Monitoring Description Monitoring Outcome Monitoring Description	Monitoring Date	•	Monitoring Time	00:00				
Monitoring Office Date of Next Monitoring Date Report Recorded Action Plan Deadline Certificate No. Monitoring Outcomes Computacy Child Care Register Met Monitoring Description CS. Future Improvements Provement Details Action Action By Computacy Voluntary Completed Completed By Mem	Monitoring Duration	0 🗘 Day(s) 00:00 🖨 H	lr(s)-Min(s)					
Date of Next Monitoring Date Report Recorded Action Plan Deadline Certificate No. Wontoring Outcomes Compulsory Child Care Register Met Monitoring Description Monitoring Description <td>Monitoring Outcome</td> <td></td> <td>•</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Monitoring Outcome		•					
Action Plan Deadline Certificate No. Monitoring Outcomes Compulsory Child Care Register Met Nontoring Description C. Monitoring Description C. Monitoring Description C. Future Improvements Improvement Detals C. Actions Action Action Action Action Action Action Action C. Monitoring Compulsory Voluntary Completed Completed By Mem Action Actio	Monitoring Officer			🔍 🗙 🤱				
Wontoring Nemo 02. Monitoring Outcomes Compulsory Child Care Register Met Monitoring Description Monitoring Description 03. Future Improvements Improvement Details	Date of Next Monitoring	J	Date Report Recorded	-				
02. Monitoring Outcomes Compulsory Child Care Voluntary Child Care Register Met Monitoring Monitoring Description Monitoring Outcome Memo © 6. Actions Acton By Compulsory Voluntary Completed Completed By Memo Memo Memo Monitoring Memo Monitoring Description Memo Monitoring Description Memo Monitoring Description Memo Memo Add X Remove Memo Minitoring Memo Memo Add X Remove Memo Monitoring Memo Monitoring Memo Memo Add X Remove Memo Memo Memo Memo Memo	Action Plan Deadline	•	Certificate No.					
Compulsory Child Care Register Met Register Met Register Met Montoring Outcome Memo Add X Remove	🔷 Monitoring Memo							
Compulsory Child Care Register Met Register Met Register Met Montoring Outcome Memo Add X Remove								
Register Met Montoring Montoring Add X Remove 0.1 Comme Montoring Memo Add X Remove 0.5 Future Improvements Improvement Details Add X Remove Montoring Memo Add X Remove 0.4 Actions Add X Remove X Remove			Velustery Child Care					
Outcome Memo X Remove 0. Future Improvements Add Improvement Details Add X Remove Add								
03. Future Improvements Improvement Details Add X Remove 04. Actions Action Action By Compulsory Voluntary Completed By Memo Add	Monitoring Description							-
Improvement Details						Outcon	iie	X Remove
Improvement Details								
Improvement Details								
Improvement Details								
Improvement Details								
Improvement Details Add X Remove 04. Actions Action Action By Compulsory Voluntary Completed By Memo Add								
C4. Actions Action Action By Compulsory Voluntary Completed By Memo Add	03. Future Improvemen	its						
04. Actions Action Action By Compulsory Voluntary Completed By Memo 🖨 Add	Improvement Details							
Action By Compulsory Voluntary Completed By Memo								X Remove
Action By Compulsory Voluntary Completed By Memo								
Action By Compulsory Voluntary Completed By Memo								
Action By Compulsory Voluntary Completed By Memo								
Action By Compulsory Voluntary Completed By Memo								
Action By Compulsory Voluntary Completed By Memo								
Action by Comparisony Voluntary Compared by Mento -	04. Actions							
× Remove	Action			Action By	Compulsory Vo	luntary Completed	Completed By Memo	-
								X Remove

- 3. On the **Monitoring Details** panel, select a **Monitoring Type** (*Lookup Table ID: 0426*) and enter a **Monitoring Date**.
- 4. If required, enter a Monitoring Ref., Monitoring Time and Monitoring Duration.
- 5. If required, select a Monitoring Outcome from the drop-down (Lookup Table ID: 0425).
- 6. If required, click the browse to display the **Select Monitoring Officer** dialog. Select the required person and click the **OK** button.
- 7. If required, enter the **Date of Next Meeting**, **Date Report Recorded** and **Action Plan Deadline** date.
- 8. If required, enter Certificate No.
- 9. If required, click the **Monitoring Memo** button to record a memo.
- 10. If required, enter details on the **Monitoring Outcomes** panel as follows:
 - a. Select the **Compulsory Childcare Register Met** check box to display a tick.
 - b. If required, select the Voluntary Childcare Register Met check box to display a tick.
 - c. If required, add a new Monitoring Description as follows:
 - i. Click the Add button to display the Monitoring Description Chooser dialog.
 - ii. Click the Search button to display a list of descriptions.
 - iii. Select the required description and click the **Select** button.
- 11. If required, click the **Add** button on the **Future Improvements** panel and enter **Improvement Details**.

- 12. If required, click the **Add** button on the **Actions** panel and enter a new action. Select the **Action By** or **Completed By** and select one or more check boxes.
- 13. Click the **Save** button.

Viewing Monitoring Information for a Provider

- 1. Search for a provider via **Focus | Early Years | Search for a Provider**. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider or service in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: Burr	nble Bee Nursery]	×	🎨 Links
💾 Save 📄 New 🔿 N	femo 🔓 Set ACL 🔲 Data Panels 🔻 Alerts 💣 Sql Mail Merge 🚔 UDF Manager		
	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Basic Details	1	Links
01. Basic Details			Communication Log Complaints
Provider Name	Bumble Bee Nurserv		Income
Entity Type	Base Revise		Job Vacancies
	Person		Links
	Establishment		Monitoring
Provider ID	50007 Base URN		Provider Census
			Reports
Provider Entity	Bumble Bee Nursery		V3 Contact Log
Address		Ξ	
Email	test@madeupsite.com		
Website			
Telephone	Fax Protection		
Opening Date	01/01/2001 👻		
Closure Reason	•		
Closing Date	Creditor Reference G1234		
	Number		
Insurer			
Parent Provider	Q, ×		
Premises Type	•		

3. Click the **Monitoring** link on the **Links** panel to display the **Monitoring Summary** page with a list of monitoring records for the provider.

Monitoring Sum	imary [for Provi	der : In in in ite	Nursery]		×				
👫 Search [🖻	Collapse 🝷								
Monitoring Se	arch								
Monitoring Re	f.								
Monitoring Ty	pe		-						
Monitoring Da	te		Monitoring	g Outcome	•				
📄 New 💥 De	New 💥 Delete 📰 Open 👆 Next 👚 Previous								
Monitoring Ref.	Monitoring Date	Monitoring Type	Date of Next Monitoring	Monitoring Officer	Monitoring Outcome				
	07/04/2015	Health & Safety	28/04/2015						

Viewing Monitoring Information for a Service

- 1. Search for a service provision via Focus | Early Years | Search Service Provision. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provis	on: k]							×	🕀 Links
💾 Save 🔲 Data Panels	🕐 Alerts 💣 Sql Mail Merge 🔗	UDF Manager							
💿 😥 01. Service Provis	ion Details 02. Registration History	03. Consent to Sh	04. Service Public 0	Contact 05. S	ervice Private Contacts	06. Vocabulary	01. Service Provisior 👻	1	Links Availability and Capacity
01. Service Provision D	etails							-	Communication Log
Service Name	lane i lan								Complaints
								Ξ	Job Vacancies Monitoring
Service Type Description	Childminder -	Service ID	278						Service Charges
FID Type	ECD -	Authority-wide	×						
Provider Name	Childcare			🗙 🔟 🛛 Deta	1				
CRB Policy		Same As Providers Address	×						
Address	44 Layaida, Drambart, Badford, Bedfo	<u>rd</u>		🟫 🗙					
Start Date	01/01/2015 💌	End Date		-					
Registered For Nursery Education Grant/Fund	✓	Previously Funded	V						
Offers Extended Childcare	\checkmark								
Details of your 30 hours offer					•				
Extended Offer Ceases From	*								
OFSTED Provision Type	Childminder - Domestic Prem	•							
FISID		Telephone Number	01234 838080						
Fax Number	01234 854848								
Email Address	co.uk								
Website	www.index.al.p.meco.uk								
Other Information	No Pets				_				

3. Click the **Monitoring** link on the **Links** panel to display the **Monitoring Summary** page with a list of monitoring records for the service.

Monitoring Sum	nmary [for Prov	ider :	Nursery]		×
🏦 Search [🔁 (Collapse 👻				
Monitoring Se	arch				
Monitoring Re	if.				
Monitoring Ty	pe		-		
Monitoring Da	te		 Monitorin 	gOutcome	•
New 💥 De	elete 📰 Open		vious		
Monitoring Ref.	Monitoring Date	Monitoring Type	Date of Next Monitoring	Monitoring Officer	Monitoring Outcome
	07/04/2015	Health & Safety	28/04/2015		

Viewing Provider Census Details

The **Provider Census** page enables you to view historical details regarding the Early Years Census.

The Early Years Census can be modified by a provider using the Self Update portal or by the LA in the v4 Client via **Early Years | Census Return**.

Additional Resources

The *Early Years Census Return* reference guide and the *One Early Years Self Update Provider Portal* handbook are available on the One Publications website and on My Account.

The v4 Client help file provides information regarding producing the Early Years Census return.

Viewing Historical Provider Census Details

- 1. Search for a provider via Focus | Early Years | Search for Provider. For more information, see <u>Searching for a Provider</u> on page 9.
- 2. Highlight the required provider in the list and click the **Open In New Window** button to display the **Maintain Provider** page.

[Maintain Provider: EY_	ESTAB_9655647]]	×	🕀 Links
💾 Save 📄 New 🚫 🕅	Aemo 🔲 Data Panels 🛛 🖤 Alerts 🚮 Sql Mail Merge 🚔 UDF Manager		
🕥 💿 01. Basic Details	02. Provider Contacts 03. Provider Organisation 04. Staff 05. Provider Services User Defined Fields 01. Bit	asic Details 🛛 👻 🎸	Communication Log
01. Basic Details		^ ^ ^	Complaints
Provider Name	EY_ESTAB_[95556647]		Income
			Job Vacancies
Entity Type	Base 🚱 Revise		Links Monitoring
	Person		Provider Census
	Establishment		
Provider ID	50163 Base URN 555648	=	
Provider Entity	EY_ESTAB_[9555647] Octai		
Linked Base	EY_ESTAB_[9555647] Q X 🔟 Detail		
Address	15 Baxter Lane, Normant, Alphaton, Si 🕋		
Email	9555647@test.com		
Website			
Telephone	5658 Fax		
Opening Date	01/04/2015		
Closure Reason			
Closing Date	Creditor Reference		
-	Number		
Insurer			
Parent Provider	Q , X		
Premises Type	•		

3. Click the **Provider Census** link in the **Links** panel to display the **Provider Census** page.

	Census [for Provider : EY_ESTAB_[9555647]							×
💾 Save								
6 6 0	1. Basic Details 02. Other Information						01. Basic Details	• 1
01. Bas	ic Details							
Year	Contact	Contact Position	Number of 2 year olds	Number of 3 year olds	Number of 4 year olds	Use Staff Summary Totals	Total teacher staff at estab	lis
2016		Manager				No		

Managing Availability and Capacity for a Service

The dates and times that a service is available, the age ranges catered for, the capacity for specific age ranges and vacancies at the service can be recorded.

Adding Opening Dates and Times

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provisi	on: k]						×	🕀 Links
💾 Save 🔲 Data Panels	👻 Alerts 🔐 Sql Mail Merge 🔮 Ul	DF Manager						
	ion Details 02. Registration History		04. Service Public Contact	05. Service Private Contacts	06. Vocabulary	01. Service Provisior 👻	1	Links Availability and Capacity
01. Service Provision D	etails						*	Communication Log
Service Name	land in the second s							Complaints
							Ε	Job Vacancies Monitoring
Service Type Description	Childminder -	Service ID	278					Service Charges
FID Type	ECD -	Authority-wide	×					
Provider Name	Childcare		Q 🗙 🔟	Detail				
CRB Policy		Same As Providers Address	×					
Address	44 Levalde, Graniterri, Gedford, Bedford	<u></u>	🏠 🗙					
Start Date	01/01/2010	End Date	•	•				
Registered For Nursery Education Grant/Fund	✓	Previously Funded	V					
Offers Extended Childcare	\checkmark							
Details of your 30 hours offer				▲ ▼				
Extended Offer Ceases From	•							
OFSTED Provision Type	Childminder - Domestic Prem	•						
FISID		Telephone Number	01234 838080					
Fax Number	01234 854848							
Email Address	en e							
Website	www.iii ico.uk							
Other Information	No Pets			▲ ▼				

3. Click the Availability and Capacity link on the Links panel to display the Availability and Capacity details page.

vailability and Capacity details	×
🗄 Save 🖉 Memo 🙆 UDF Manager	
Ol. Opening Dates + Times 02. Availability 03. Age Range Details 04. Capacity Details 05. Vacancy Information	01. Opening Dates + 👻 🚀
01. Opening Dates + Times	î
Description Start Date End Date	🖶 Add
	Edit
	Remove
	Clone

4. Click the Add button on the Opening Dates + Times panel to display the Opening Dates + Times Details page.

S Opening Dates+Times Details	_ 0 X
E Save	
I. Opening Dates 02. Opening Times 03. Opening Times Exceptions 04. Memo Details 01. Opening	ng Dates 👻 🥖
01. Opening Dates	^
Description	
Start Date End Date	
02. Opening Times	
Weekday Start Time End Time Duration Capacity Vacant Filled Description	🖶 Add
	🕤 Edit
	💥 Remove
	E
03. Opening Times Exceptions	
Weekday Start Time End Time Duration Start Date End Date Capacity Vacant Filled Is Open Description	🖶 Add
	🕤 Edit
	💥 Remove

- 5. On the **Opening Dates** panel, enter a **Description**.
- 6. Select a Start Date.
- 7. If required, select an End Date.
- 8. On the **Opening Times** panel, click the **Add** button to display the **Opening Times Details** dialog.

🕥 Opening Tim	es Details		
💾 Save			
🔇 🕗 Opening	Times		Opening Times 🔹 🥖
Opening Times	3		
Weekday	at Set →	Start Time	
End Time		Duration	
Capacity		Vacant	
Filled			
Description			

- 9. Select a **Weekday** from the drop-down list.
- 10. Enter a Start Time and End Time (hhmm format).
- 11. Enter a Capacity.
- 12. If required, enter the number of Vacant places and a Description.
- 13. Click the **Save** button.
- 14. If required, enter the details of exceptions to the normal opening times on the **Opening Times Exceptions** panel as follows:
 - a. Click the Add button to display the Opening Times Details dialog.

- b. Select a Weekday and enter the Start Time, End Time and Capacity.
- c. Enter the number of Vacant places and a description.
- 15. If required, enter a memo on the Memo Details panel.
- 16. Click the Save button.

Adding Availability

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.
- 3. Click the Availability and Capacity link on the Links panel to display the Availability and Capacity details page.
- 4. Select the Availability tab.

Availability and Capacity			8
💾 Save 🔷 Memo 😩	UDF Manager		
💿 💿 01. Opening Dat	es + Times 02. Availability 03. Age Range Details 04. Capacity Details 05. Vacancy Information	02. Availability	• 1
•	III	•	6
			\geq
02. Availability No Weeks Open			
Times			
Thirds			
Other Hours			
Availability			
Funded Places Availability			
Availability			
When is Service	Internal Code Description External Code Active		
Available	X Remove		

- 5. If required, enter the following information:
 - a. Enter the number of weeks that the service is open during the year in the **No Weeks Open** field.
 - b. Enter free text in the **Times**, **Other Hours**, **Availability and Funded Places Availability** fields.
 - c. Click the Add button to display the Lookup Codes When is Service Available? dialog.

💊 Lookup Co	des - When is se	rvice available?	
🤣 Select All	💞 Select		
Internal Code	Description	External Code	Active
ALL	All Year	ALL	Yes
BAN	Bank Holidays	BAN	Yes
EVE	Evenings	EVE	Yes
FUL	Full Time	FUL	Yes
HAL	Half Term	HAL	Yes
INS	Inset Days	INS	Yes
LUN	Lunch Club	LUN	Yes
OVN	Overnight	OVN	Yes
PAR	Part Time	PAR	Yes
SCH	School Holidays	SCH	Yes
TER	Term Time	TER	Yes
WKD	Weekends	WKD	Yes
Lookup Code	[All Year]		
💾 Save 📄 N	lew		
🔇 💿 Looku	p Code		Lookup Code 🗸
Lookup Cod	e		
Internal Cod	e ALL		
Description	All Ye	ar	
Active	V		

- d. Highlight one or more codes and click the **Select** button.
- 6. Click the **Save** button.

Adding Details of Age Ranges for the Service

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.
- 3. Click the Availability and Capacity link on the Links panel to display the Availability and Capacity details page.
- 4. Select the Age Range Details tab.

💾 Save 🔷 Memo 🤮 UDF Manager	
🕲 😥 01. Opening Dates + Times 02. Availability 03. Age Range Details 04. Capacity Details 05. Vacancy Information 03. Age Range Details 03. Age Range Details 04. Capacity Details 05. Vacancy Information 05. Vacancy Information 05. Age Range Details 05. Vacancy Information 05. V	1
03. Age Range Details	^
Min Age Years Min Age Months	
Max Age Years Max Age Months	
2 Year Old Funding 🗙 3 Year Old Funding 🗙	
4 Year Old Funding X Children Over 8 X	
Suitable Age Range Details	

- 5. If required, enter the following information:
 - a. Enter the minimum age in years and months.
 - b. Enter the maximum age in years and months.
 - c. Select one or more of the check boxes to display a tick:
 - 2 Year Old Funding
 - 3 Year Old Funding

- 4 Year Old Funding
- Children Over 8.
- d. Enter Suitable Age Range Details.
- 6. Click the Save button.

Adding Capacity Details for the Service

- 1. Search for a service provision via Focus | Early Years | Search Service Provision. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.
- 3. Click the **Availability and Capacity** link on the **Links** panel to display the **Availability and Capacity details** page.
- 4. Select the Capacity Details tab.

04. Capacity Details										
Capacity Date	01/08/2	01/08/2005 🔹		Va	acancy Date					
Waiting List Date	01/01/20	006	•	1						
Age Range Heading	Age From	Age To	Capacity	Vacancies	Waiting List					🖶 Add
3	3	3	10		3					🕤 Edit
4	4	4	10		2					💥 Remove

5. Click the Add button to display the Capacity Details dialog.

S Capacity Details	_	 _		• · · ·	x
E Save					
Capacity Details			Capacity Details	-	1
Capacity Details					
Select Age		 l X			
Capacity	Vacancies				
Waiting List					

6. Click the browse button to display the Age Range Enquiry dialog.

💊 Age Range Enquiry		
🏦 Search 🖹 Collapse 🕞		
Age Range		
Age Range Heading		
Age From	Age To	
Select 📄 New 💥 Delete		

- 7. If required, enter search criteria.
- 8. Click the **Search** button to display a list of age ranges.
- 9. Highlight the required age range and click the **Select** button.
- 10. Enter the **Capacity** for the selected age range.
- 11. If required, enter the number of **Vacancies** and the number on the **Waiting List** for this age range.
- 12. Click the **Save** button.

Adding Vacancy Information for the Service

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.
- 3. Click the **Availability and Capacity** link on the **Links** panel to display the **Availability and Capacity details** page.
- 4. Select the Vacancy Information tab.

05. Vacancy Information Contact for Vacancies Contact Method for Updating Vacancies	Immediate Vacancies Waiting List	x v	
Vacancy Other Information		► ▼	

- 5. If required, enter the following information:
 - a. If the service can be contacted to get vacancy information, select the **Contact for Vacancies** check box to display a tick.
 - b. If there are immediate vacancies, select the **Immediate Vacancies** check box to display a tick.
 - c. Select a Contact Method for Updating Vacancies.
 - d. If there is a waiting list, select the **Waiting List** check box to display a tick.
 - e. Enter Vacancy Other Information.
- 6. Click the Save button.

Viewing Availability and Capacity for a Service

- 1. Search for a service provision via Focus | Early Years | Search Service Provision. For more information, see <u>Searching for a Service Provision</u> on page 42.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provisi	on: k]						×	🕀 Links
💾 Save 🔲 Data Panels	👻 Alerts 🕈 Sql Mail Merge 🔮 Ul	DF Manager						
	ion Details 02. Registration History		04. Service Public Contact	05. Service Private Contacts	06. Vocabulary	01. Service Provisior 👻	1	Links Availability and Capacity
01. Service Provision D	etails						*	Communication Log
Service Name	land in the second s							Complaints
							Ε	Job Vacancies Monitoring
Service Type Description	Childminder -	Service ID	278					Service Charges
FID Type	ECD -	Authority-wide	×					
Provider Name	Childcare		Q 🗙 🔟	Detail				
CRB Policy		Same As Providers Address	×					
Address	44 Levalde, Graniterri, Gedford, Bedford	<u></u>	🏠 🗙					
Start Date	01/01/2010	End Date	•	•				
Registered For Nursery Education Grant/Fund	✓	Previously Funded	V					
Offers Extended Childcare	\checkmark							
Details of your 30 hours offer				▲ ▼				
Extended Offer Ceases From	•							
OFSTED Provision Type	Childminder - Domestic Prem	•						
FISID		Telephone Number	01234 838080					
Fax Number	01234 854848							
Email Address	en e							
Website	www.iii ico.uk							
Other Information	No Pets			▲ ▼				

3. Click the **Availability and Capacity** link on the **Links** panel to display the **Availability and Capacity details** page.

Availability and Capacity details		×
💾 Save 🔷 Memo 🚔 UDF Manager		
Ol. Opening Dates + Times 02. Availability 03. Age Range Details 04. Capacity Details 05. Vacancy Information	01. Opening Dates + 👻	1
01. Opening Dates + Times		î
Description Start Date End Date	🖶 Add	
	Edit	
	X Remove	
	Clone	

- 4. Select the required tab to view the following information for the service:
 - Opening Dates and Times
 - Availability
 - Age Range Details
 - Capacity Details
 - Vacancy Information.

Managing Service Charges

Service charges for each age range and costs details for a service can be recorded.

Adding Service Charges and Cost Details

- 1. Search for a service provision via **Focus | Early Years | Search Service Provision**. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provis	ion: 🔣 🙀							×	🎨 Links
💾 Save 🔲 Data Panels	s 🖗 Alerts 🔐 Sql Mail Merge 🔗	UDF Manager							
💿 😥 01. Service Provis	sion Details 02. Registration History	03. Consent to Sh	04. Service Public C	ontact 05. Se	ervice Private Contacts	06. Vocabulary	01. Service Provisior 👻	1	Links Availability and Capacity
01. Service Provision D	etails							-	Communication Log
Service Name	land in the second s								Complaints
								E	Job Vacancies
Service Type Description	Childminder -	Service ID	278						Monitoring Service Charges
FID Type	ECD -	Authority-wide	×						
Provider Name	Childcare		Q	🗙 🔟 Detai	1				
CRB Policy		Same As Providers Address	×						
Address	44 Layoida, Draminant, Dadford, Bedfo	<u>'d</u>		🟫 🗙					
Start Date	01/01/2015 👻	End Date		•					
Registered For Nursery Education Grant/Fund	\checkmark	Previously Funded	V						
Offers Extended Childcare	\checkmark								
Details of your 30 hours offer	5				▲ ▼				
Extended Offer Ceases From									
OFSTED Provision Type	Childminder - Domestic Prem	-							
FISID		Telephone Number	01234 838080						
Fax Number	01234 854848								
Email Address	Land Land Land Land Land								
Website	www.initialized.co.uk								
Other Information	No Pets				•				

3. Click the **Service Charges** link on the **Links** panel to display the **Service Cost Details** page.

					×
💾 Save					
	jes 02. Cost Details				01. Service Charges 👻 🎸
01. Service Charges					
Age Range Per Hour	Per Session Per Day Per Week			Per Term	Add S Edit ≪ Remove
02. Cost Details					
Contact Service for Costs	×	Sibling Discount	×		
Other Cost Information				▲ ▼	
Reduction Information				e) (u B »	

4. Click the **Add** button on the **Service Charges** panel to display the **Service Charges Details** page.

Service Charges Det	ails			
💾 Save				
💿 💿 01. Service Char	ges			01.Service Charges 👻 🥖
01. Service Charges				
Age Range			Q X	
Per Hour	0.00	Per Session	0.00	
Per Day	0.00	Per Week	0.00	
Per Term	0.00			

Service charges can be recorded for each Age Range as follows:

a. Click the browse button to display the Age Range Enquiry dialog.

💊 Age Range Enquiry			
👫 Search 🖹 Collaps			
Age Range			
Age Range Heading			
Age From		Age To	
🖌 Select 📄 New 🖇	Delete		

- b. Search for and select the required Age Range.
- c. Enter the service charges for the selected age range.
- d. Click the Save button.
- 5. If required, enter details on the **Cost Details** panel as follows:
 - a. If the service can be contacted for cost information, select the **Contact Service for Costs** check box to display a tick.
 - b. If the service offers a sibling discount, select the **Sibling Discount** check box to display a tick.
 - c. If required, enter Other Cost Information.
 - d. If required, enter a **Reduction Information** memo.
- 6. Click the **Save** button.

Viewing Service Charges and Cost Details

- 1. Search for a service provision via Focus | Early Years | Search Service Provision. For more information, see <u>Searching for a Service Provision</u> on page *42*.
- 2. Highlight the required service in the list and click the **Open In New Window** button to display the **Maintain Service Provision** page.

[Maintain Service Provis	ion: k]						⋈	🥺 Links
💾 Save 🔲 Data Panels	🛛 👻 Alerts 💣 Sql Mail Merge 🔗	UDF Manager						
💿 😥 01. Service Provis	sion Details 02. Registration History	03. Consent to Sh	04. Service Public Contact	05. Service Private Contacts	06. Vocabulary	01. Service Provisior 👻	1	Links Availability and Capacity
01. Service Provision D	etails						-	Communication Log
Service Name	land in the second s							Complaints
							E	Job Vacancies
Service Type Description	Childminder -	Service ID	278					Monitoring Service Charges
FID Type	ECD -	Authority-wide	×					
Provider Name	Childcare		🤍 🗙 🔳	Detail				
CRB Policy		Same As Providers Address	×					
Address	44 Laysida, Dramham, Badfurd, Bedfor	<u>rd</u>	🟫 🗙					
Start Date	01/01/2015 🔹	End Date	-	•				
Registered For Nursery Education Grant/Fund	✓	Previously Funded	~					
Offers Extended Childcare	\checkmark							
Details of your 30 hours offer								
Extended Offer Ceases From	*							
OFSTED Provision Type	Childminder - Domestic Prem	-						
FISID		Telephone Number	01234 838080					
Fax Number	01234 854848							
Email Address	co.uk							
Website	www.							
	www.							
Other Information	No Pets			▲ ▼				

3. Click the **Service Charges** link on the **Links** panel to display the **Service Cost Details** page.

								×
💾 Save								
	ges 02. Cost Details						01. Service Charges 👻	1
01. Service Charges								
Age Range Per Hour	Per Session Per Da	y Per Week			Per Term	1	🖶 Add	
							Section Edit	
							A Kenio	ve
L								
02. Cost Details								
Contact Service for Costs	×		Sibling Discount	×				
Other Cost Information					-			
					▲ ▼			
Reduction Information						5		
						<u>6</u>		
						B		
						»		

04 Ofsted Data Import

Ofsted data can be imported daily into the One database.

Note: The Ofsted import and Window Scheduled task (used to schedule the time for the data import), is configured by One Technical support or see The <u>FID/Ofsted Import Technical guide</u> that provides information on configuring the import.

When Ofsted data is imported, the One system looks for an existing Ofsted record with a matching Ofsted Reference Number. If a match is found a link is made between the existing Provider record and the Ofsted record. The imported Ofsted data is held separately from and does not update the existing Provider record.

Any changes, deletions, or additions to the Ofsted data since the last import are added to the audit log.

The audit log can be accessed via the **Audit Details** screen. An alert can also be setup to notify specific users of any changes, so they can update the Provider details in One.

Setup and Activate Audit Log Alert

When the audit log is updated, an alert can be raised to inform individuals or groups by a Workflow message or email. If no alert is set, the workflow message can be accessed on the <u>Audit Trail</u> screen.

An alert already exists on the system. You need to identify who it is to be sent to and activate it.

- 1. Select Tools | Administration | Alert Definition. This displays the Maintain Alert screen.
- 2. In the description field enter **Ofsted Registration** and click search.
- 3. Select the Audit Log displayed and click Open In New Window.

Y Maintain Alert											
🐴 Search 🔁 Collapse	•										
Alert Enquiry											
Description	ofsted registration	sted registration									
Alert Type	-										
Trigger Alert Table						•	•				
SQL Alert Context				•							
🖌 Select 📄 New 🛅 🕻	pen In New Winde	ow 🚷 Action	*								
Trigger Alert Table SQL	Alert Context Desc	ription		Reason			Active	Predefined			
Audit Log	Ofste	ed Registration (Change	To alert chan	ges to an Ofsted Re	gistration	False	False			
Alert Definiton [Audit Lo	g - TRG_ALERT_C	FSTED_CHAN	IGE]								
💾 Save 📄 New 🍪 🛙	Deactivate 💥 Dele	ete									
🕝 💿 1. Alert Definition	2. Trigger Alert	3. SQL Alert	4. Sch	eduled Alert	5. Recipient List	6. Action	n 7. Vie	w Trigger SQL			
1. Alert Definition											
Alert Definition ID	5935f35d-1c4b-	122c-925b-8eed	:12514e	15							
Alert Type	Trigger	*									
Reason for Alert	To alert changes	to an Ofsted R	egistrati	on							
Description	Ofsted Registra	tion Change									
Active	~			Predefin	ed 🗙						

The **Alert Definition** screen opens. In the **Alert Definition** panel, it shows the entries in the template. The **Active** field will initially display an X but changes to a tick to show it is active after the alert has been activated.

4. To select users, scroll down to the **Recipient List** panel, click **Add Users** and select the Users you want to be notified of when a change is imported.

Alert Definition [Audit Save New 6 Alert Definition Alert Definition Recipient List	Activate 💥	Delete	CHANGE] Nert 4. Scheduled Alert 5. Recip	vient List 6. Action	ı	5. Recipient List -
Type User	Name ANDREA	Description Andrea	EmailAddress publications1@onetestsmtp.co.uk	Email Popup W		 Add Users Add Portal Users Add Groups Add People Add Bases Add Posts Add By Query Add Email Remove

- 5. Next, click in the box under **Workflow** to change it from an X to a tick.
- 6. Click Save. This generates the Activate alert message as shown below.
- 7. Select Yes to Activate the Alert.



Note: Once the Alert is activated, if a change to the alert is required, for example, to add additional users or form of notification, then the alert will need to be Deactivated by selecting Deactivate on the menu. The Alert must be re-activated once all change has been made.

With the Alert now activated, when Ofsted data is imported users will receive a workflow message on their homepage.

Ofsted Registration Workflow Messages

Ofsted Registration messages display in the Workflow message panel on Users homepage.

🍣 My Workflow Messa	ges					
🔄 Refresh 💥 Deactiv	ate 🐴	Search				
Subject Overdue	Task	Due	Assigned By	Post	Assigned On	Message
Not Due		25/09/2020	System Administ		25/09/2020	Report request failed. Error exporting generated report : Missing parameter values.
✓ Ofsted Registrat		29/10/2020	System Administ		22/10/2020	Ofsted Registration :
Sfsted Registrat		29/10/2020	System Administ		22/10/2020	Ofsted Registration :
🔲 🔍 Ofsted Registrat		29/10/2020	System Administ		22/10/2020	Ofsted Registration :
🔲 🔍 Ofsted Registrat		29/10/2020	System Administ		22/10/2020	Ofsted Registration :

The message column indicates which provider the change relates to. The user needs to open each message to view a list of changes and then manually make those changes to the existing Provider details. To view the details of the change, select a Workflow message to open the **Audit Details** screen listing the changes made for that provider, or the details of a new provider.

2000-00-075000-04 7	gistration : 2569113 - Rising Stars Wrap Around Clubs Limited	
Added by K		
	ARENO on 22/10/2020 15:37:12	
Sr. No.	List of Changes	85
1	Name	
2	Rising Stars Wrap Around Clubs Limited Address Line 1	
2	Units 2-4 Weston Barns	
3	Address Line 2	
	Hitchin Road	
4	Town Weston	
5	County Hertfordshire	
6	Post Code SG4 7AY	
7	Unique Postcode Reference Number o	
8	Telephone Number 01462790152	
9	Mobile Number 07974256207	
10	Unique Postcode Reference Number 0	
11	05. Registration Status History	
	RegStatus o Status	
	PROP	
	o Change Date	
	11/11/2019	
	RegStatus O Status	
	o Status ACTV	
	o Change Date	
	19/12/2019	

New Provider

If a new provider is imported, a new record needs to be created, using the information in the **Audit Detail.** To create a new Provider, see <u>Adding A new provider</u>.

Alternatively,

- 1. Select Focus | Early Years | Search for Ofsted Details
- 2. From the **Audit Detail**, enter the Provider name, Post code or Ofsted ref. number and click search.
- 3. In the search result the Provider displays with a status of Unmatched.
- 4. Select the Provider and click Add Unmatched.

The **Maintain Service Provision** screen opens with the fields populated with the imported data for the Provider. However, the information can appear in the incorrect fields and will require a lot of admin work. For example, the Provider can be shown as a Base. The Registration History record will also display the word Dummy in the **Registration Type** and **Area** field as shown in graphic below. The word Dummy must be removed.

[Maintain Service Provis	(Maintain Service Provision: Bob Jones - Ofsted Import (Dummy)]									
💾 Save 🄓 Set ACL 🔲 Data Panels 🛛 👻 Alerts 🚮 Sql Mail Merge 🚵 UDF Manager										
💿 🥹 01. Service Provision Details 02. Registration History 03. Consent to Sh 04. Service Public Contact 05. Service Private Contacts 06. Voca										
02. Registration Histor	у									
Registration Details	Initial Contact Date	Start Date 8	End Date R	Registration Type	4	Area	Loca	🖶 Add		
	26/01/2009	26/01/2009	C	Ofsted Import (Dum	nmy) (Ofsted Import (Dummy) Ofste	🛐 Edit		
								💥 Remove		
								💽 OFSTED Informati	on	
								🔄 Ofsted Registered	Person	

Due to the additional admin work required, it is recommended to create a new provider record instead of using this method.

Search Ofsted Data

There is the ability to search for Ofsted date to see all imported records

- 1. Select Focus | Early Years |search Ofsted data
- 2. Click the **Search** icon.

Search for Ofsted								
👫 Search [🖻 Collapse	•							
Search for Ofsted								
Provider Name								
Provider Postcode		Registration Status	-					
Matched	-	Reference Number						
Coursely from Descuiders	Matched =							
Search for Provider								
Service Type			Q X					
Open In New Window	v 🔍 Add Unmatch	ed						
	_							

This displays a list of provider records that have been imported. Changed records display on My <u>Workflow screen</u> or in the **Audit Trail** where the details of the change can be viewed. Providers not matched to an Ofsted Reference number have an Unmatched status. This probably means that either they are a new provider and require a record to be created for them, or the Ofsted details haven't been linked to an existing Service Provision in the <u>Registration History</u>. To add the unmatched record, see <u>New Provider</u>.

Audit trail

If an Alert is not activated, Users will not be notified when there is a change in the Imported data. This will require Users to check the **Audit trail** daily, to see the list of Providers imported with a change as follow:

- 1. Select Tools | Audit Trail | Audit Trail
- 2. In Full Form Title field, enter Ofsted.
- 3. Click the **Search** icon.

-

The search result will return a list of Providers, similar to the Workflow screen on the homepage.

Audit Enquiry												
A Search	Collapse											
Audit Enquin	У											
Revision By						9	X					
Revision From	m	15/10/20	20 -		То		22/10/20	20 -				
Family Name												
Given Name												
Full Form Titl	le											
Main Form ID	,											
Inserted		/			Updated		v v					
Deleted		/			Viewed		V					
Printed		/			Exported		V					
🖾 Open 🛅 🕻	Open In Nev	v Winde	ow 😽 Next 🍲 P	revio	us Export to E	xcel						
								Drag a co	olumn here to group by this co	lumn.		
Audit Type	Revision	n By	Revision Date		Family Name	Given	Name	Full	Form Title	Main For	m ID	Sub Form ID
Contains: 🝸	Contains:	4	Equals:	7	Contains: 🛛 🖓	Contains	- V	Contains:	8	Contains:	7	Contains: V
Inserted	SYSADMIN		22/10/2020 15:45:1	8				Workflow Message (Sul	bject: Ofsted Registration C	65c2366f-7ec9-4ff7-892	b-4ffb262eec6d	65c2366f-7ec9-4ff7-892b-4ffb262eec6d
Inserted	SYSADMIN		22/10/2020 15:45:1	8				Workflow Message (Sul	bject: Ofsted Registration C	590d716f-3d28-45b7-a3	2e-1e421c765bdc	590d716f-3d28-45b7-a32e-1e421c765bdc
Inserted	SYSADMIN		22/10/2020 15:45:1	8				Workflow Message (Sul	bject: Ofsted Registration C	22fb0cf4-75cb-43f1-b8e	0-6f9cd0c01fa6	22fb0cf4-75cb-43f1-b8e0-6f9cd0c01fa6

4. To view the details, click on the Workflow Message for a Provider. The <u>Audit Details</u> screen displays all changes made.

05 Glossary of Terms

FID

The One Early Years Family Information Directory (FID) provides a directory of childcare information, facilities and publications.

FISID

FISID is the identity of the local Family Information Service, providing information on services available to parents and carers.

Payment Band

Payment bands can be associated to a provider or a service and enable you to filter the list of funded providers or services displayed.

Stretched Offer

Stretched Offer funding enables parents and carers to take fewer free hours per week over more weeks of the year.

Extended Childcare

Some parents of 3 and 4 year-old children qualify for an additional 15 hours of free childcare in addition to the universal entitlement. Extended Childcare is the additional free childcare that is offered by some providers to parents who qualify.

Index

additional information	
age ranges	69
availability	68
availability and capacity	65
awards	
capacity	
checks1	
communication log	
complaints	43 10
consent to share	
contacts	
early years introduction	
eligibility	
facilities	
FID data	
funding details	33
income	
job vacancies	54
keywords	33
links 57	
memberships	59
monitoring	
observations	
opening dates and times	
permissions	
private contacts	
provider basic details	12
provider census	~ ~ ~
view historical information	
provider contacts	
provider details	
provider entity	
provider links	
provider organisations	15
provider search	9
provider services	
provider staff	
public contacts	
qualifications	
referral	
registration history	
representatives	
school pickups	
service charges	
service provision27, 3	
services	
setup permissions	8
special provision	34
staff employer	
staff information	
staff observations	23
staff other checks and services	
training	
travel	36
umbrella organistion	
vacancies	
vocabulary	
····· , ·····	