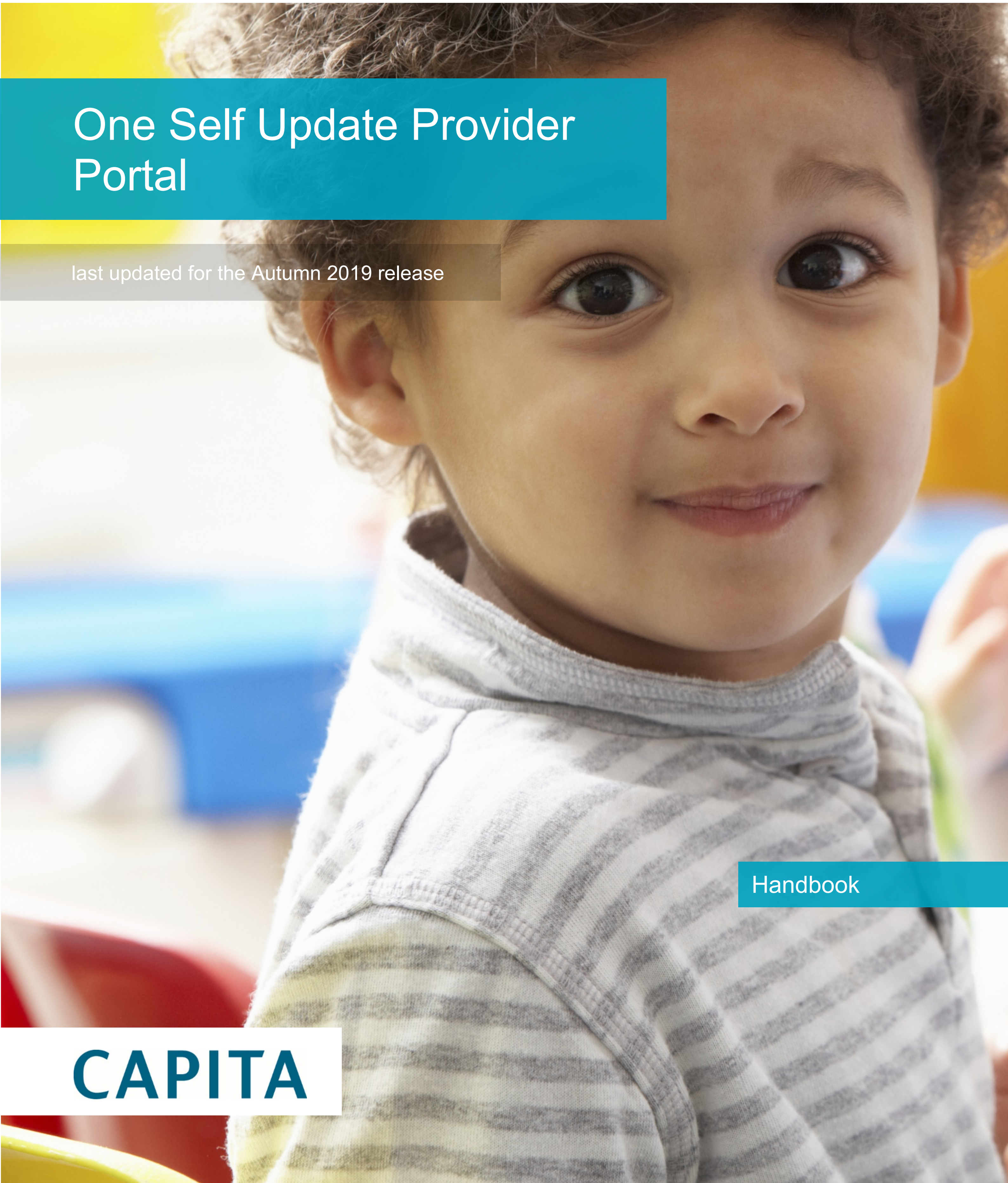
oneeducation

One Self Update Provider Portal

last updated for the Autumn 2019 release



Handbook

CAPITA

Revision History

Copyright

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on My Account.

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, 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

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01 | Document Change Control

Date	Release	Description
Autumn 2019	3.70	**File Upload** File Upload is a new functionality in the software. With this functionality (and based on configuration options set by the local authority) Providers have the option to upload file(s) against their service(s) and send them to their local authority. For more information see *File Upload to Local Authority* on page *51 and* *Managing Uploaded Files* on page *54* • A new permission has been introduced that controls whether users / groups can access the Provider Self Update Portal |Admin | File Upload tile. The new permission is called '**Self Update File Upload'.** For more information see *SUPP Administration Access* on page *13* • Local authority staff (with appropriate permissions) can manage the files that have been uploaded by providers and choose whether to view them, delete them or link them as a linked document against the services record in the v4 client via **Focus | Early Years | Search for Service Provision | Service Details | Linked Documents**. For more information see *Managing Providers Uploaded Files* on page *35* • Local authority staff, through a few numbers of configuration options can control whether providers have the ability to upload files or not. If they are allowed, then the authority can specify which file type extensions, the number of files that can be uploaded per service in one submission (between 1 and 5) and whether providers can delete the files they have uploaded. For more information see *Managing and Configuring File Upload* *on page 34*

Date	Release	Description
Apr 2019	3.68	**Manage Access - Audit log** A new database table named audit_log_user_prov_access will record the details of users that have been assigned or removed access to providers/services via Manage Access. For more information see *Audit Log* page *11*
Autumn 2018	3.67	**Guidance Notes** Guidance Notes can now be configured for Travel, Costs and Availability found in the Text Customisation screen under Self Update Guidance group. For more information, see *Guidance Notes* on page *15*
		Comments for Local Authority Entries made by Providers in the Comments for Local Authority field is now recognised as a Change. For more information see *Approving Provider Updates* on page *29*
		School Pickups Local Authorities can configure school pickups to display the relevant bases list to a provider. For more information, see *Changes to school pickups* on page *76.*
		Offers Extended Childcare **Extended Hours Ceases from** in Provider Portal have been changed to reflect the option chosen in v4 Client. For more information, see *Updating Service Basic Details* on page *62.*
		EY Census Staff Qualifications have been re-organised to reflect the lowest to highest qualification as defined in the EY Census guide. For more information, the *Statutory Early Years Census Handbook* is available on the One Publications website.

02 | Introduction to the Self Update Provider Portal

Overview

The Self Update Provider Portal (SUPP) enables Early Years providers to view the information that is stored about them and their services in One Early Years v4. Providers can use the portal to add missing information or update incorrect information.

Local Authorities can view the changes submitted by Early Years providers. They can approve, reject or change the submissions before updating the One v4 Client.

Using this Handbook

This handbook is intended for the use of Local Authority administrators using the Self Update portal to view and approve the changes submitted by providers.

The first chapter gives an overview of the Self Update portal and any changes made for the current release.

The second chapter describes the Provider portal administration functions including managing user accounts.

The third chapter covers the administration functions in the Self Update portal including the processing of provider self-updates.

The fourth chapter gives an overview of the functionality used by providers to view and update their details.

More Information: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide available on the One Publications website.

03 | Administering the Provider Portal

Introduction

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

- Manage the setup and configuration of the website.
- Manage user accounts and access to provider details.

More Information: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide available on the One Publications website.

Setting the Language in Chrome

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

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

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

Common Functionality

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

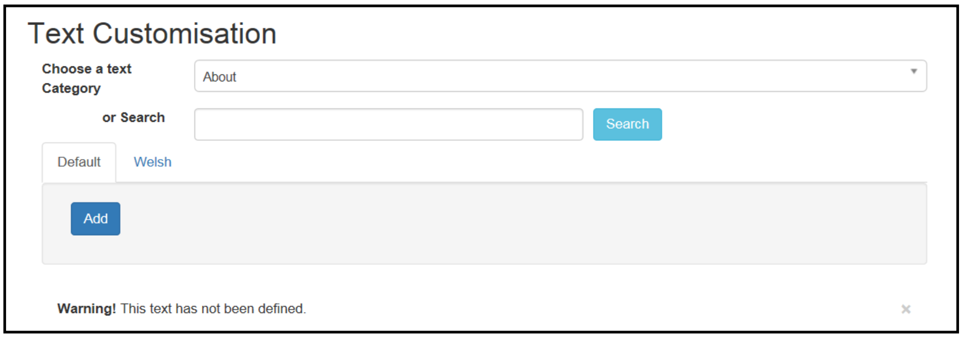
Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the **Home** button to display the **Home** page
Change Password	Click the drop-down adjacent to the user name and select **Change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

Function	Description
Sign out	Click the **Sign Out** button adjacent to the user name.

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

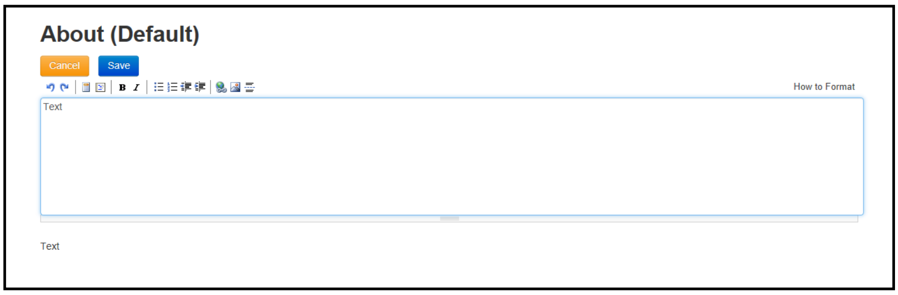
Type	Name	Description
Site Notices	Announcements and Welcome Text Provider Home Guidance Text About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Displayed when the user logs into the portal. Displayed on the **Home** page. Text is displayed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

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



2. From the **Choose a text category** drop-down, select the category of text to be configured.
3. Alternatively, enter search criteria, click the **Search** button and select the text.

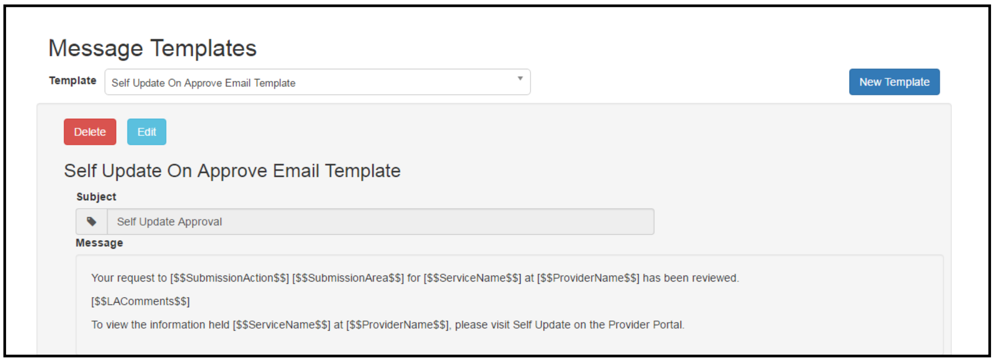
4. Select the **Default** or **Welsh** tab to determine the text language.
5. Click the **Add** button.



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

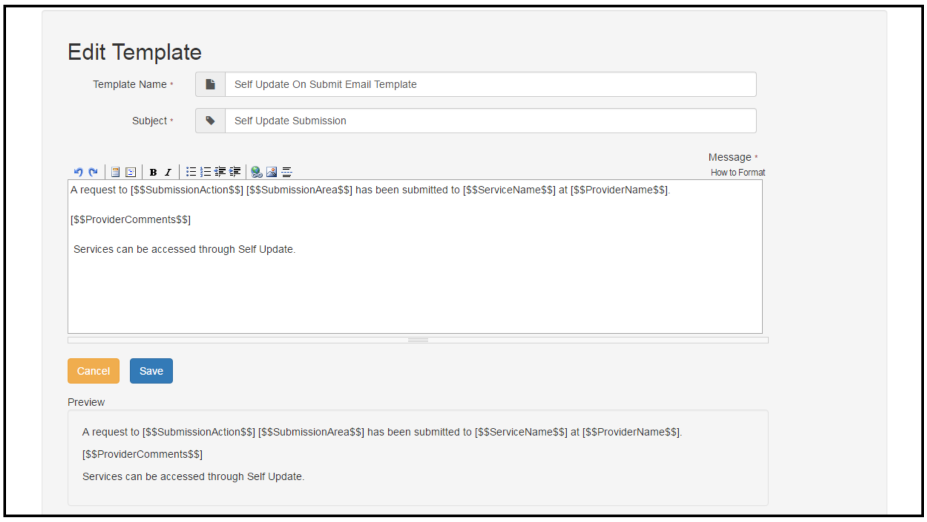
Message Templates

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



Editing a Template

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



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

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

5. Click the **Save** button.

Managing User Accounts

The association of permission roles to a user account in the v4 Client enables access to the Self Update Provider Portal (SUPP). The permissions associated with the role control user access to business processes. For information about permissions, see Permissions on page *13*.

The services that a user can access are managed in the Provider portal by selecting **Manage Access** from the **Administration** menu.

Creating a Portal User Account

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

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

Setting up User Accounts in the v4 Client

To set up a new user account in the One v4 Client:

1. Create a user account.
2. Create a user group.
3. Associate the user account to the user group.
4. Assign business processes to the user group.
5. Assign access rights. For more information, see Assigning Access to Business Processes on page *13*.

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

Setting Up Two Step Verification

Introduction

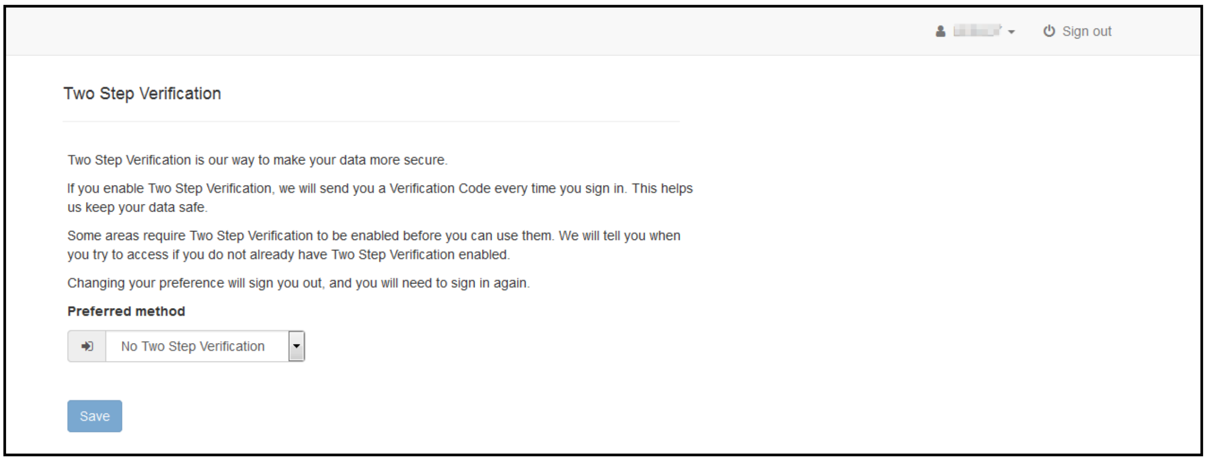
If two step verification is enabled, you will be sent a verification code every time you sign in.

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

Enabling Two Step Verification

To enable two step verification:

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



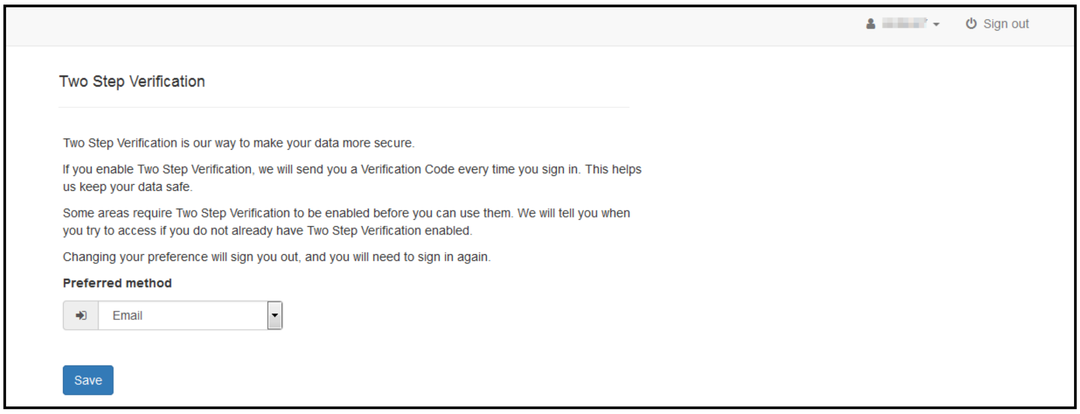
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

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

Disabling Two Step Verification

To disable two step verification:

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



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

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

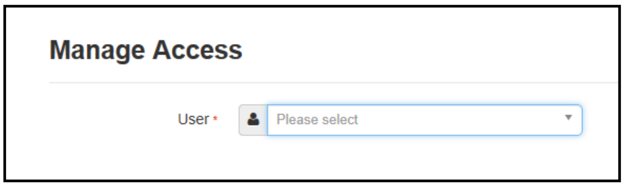
Managing User Access

Granting Access to Providers and Services

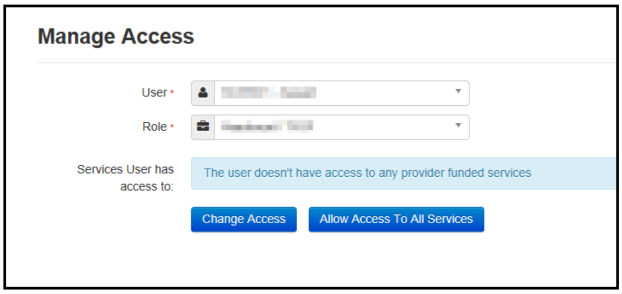
After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

To update access for the selected user:

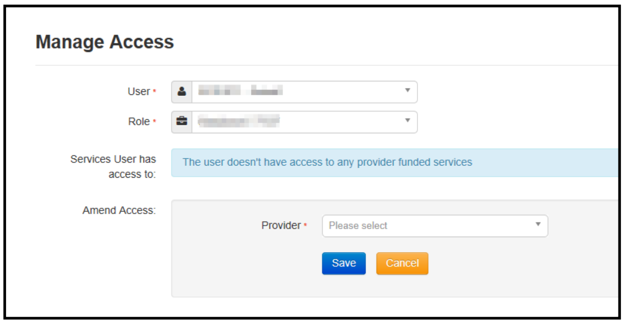
1. Select **Administration | Manage Access** to display the **Manage Access** page.



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



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



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

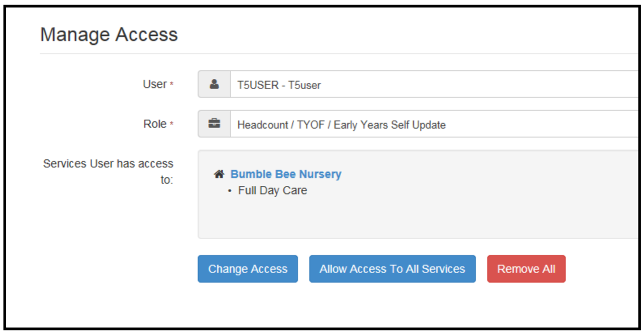
For the Self Update portal there are two separate levels of access:

- Providers who need to have access to their services.
- Local Authority Early Years administrators who need to have access to all providers for SUPP management.

Removing Access from a User

To remove a user's access to all services:

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



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

Audit Log

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

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

*Note : Details of the user ID can be found out in the **security_users** table*

Reviewing Users

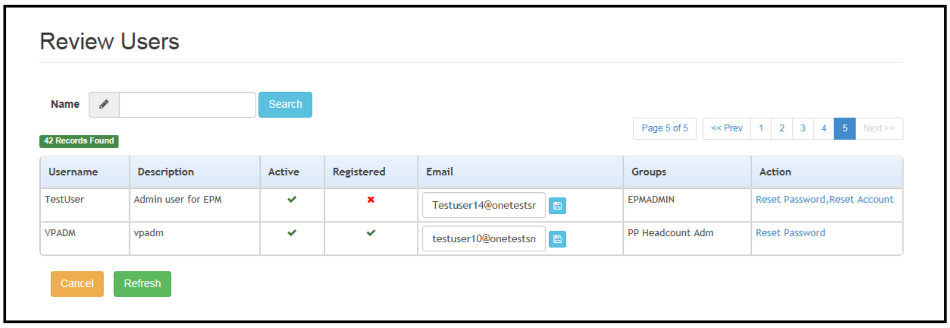
Introduction

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

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

Viewing User Details

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



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

Updating a User Email Address

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

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

Resetting a User Password

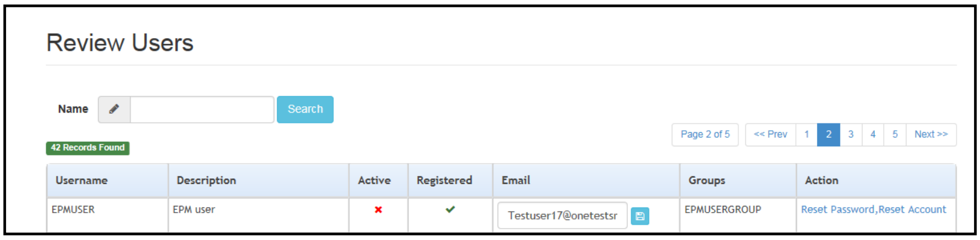
If a user has forgotten their password, to enable them to reset their password:

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

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

Resetting a User Account

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



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

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

> ***NOTE:*** *The* ***Reset Account*** *link is also displayed if the user has requested a new password and this has not been reset. For more information, see* [*Resetting a User Password*] *on page* 12

Permissions

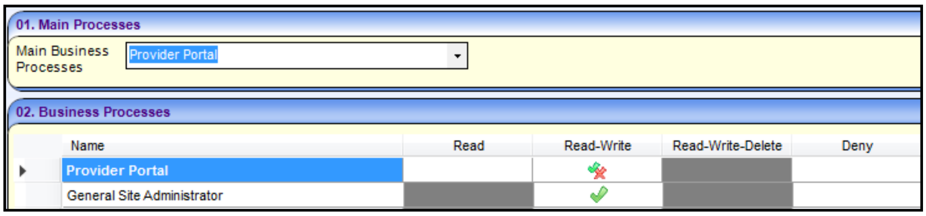
Assigning Access to Business Processes

Access is granted to a user group in the One v4 Client:

1. Select **Tools | Permissions | User Group Processes**.
2. Search for the required user group.
3. Highlight the required user group and click the **Select** button.
4. Select **Provider Portal** from the **Main Business Processes** drop-down.
5. Assign the required access to the **Business Processes** for the Self Update Provider portal:

Portal Administration Access

To access the **Administration** menu route to manage user accounts and site setup, **Read/Write** access must be assigned to the **General Site Administrator** business process as shown in the following graphic:

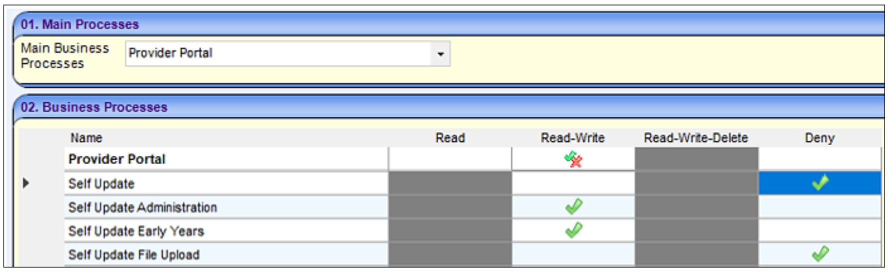


SUPP Administration Access

To administer the Self Update Provider portal, Read/Write access must be assigned to the following business processes:

- Self Update Administration
- Self Update Early Years

as shown in the following graphic:

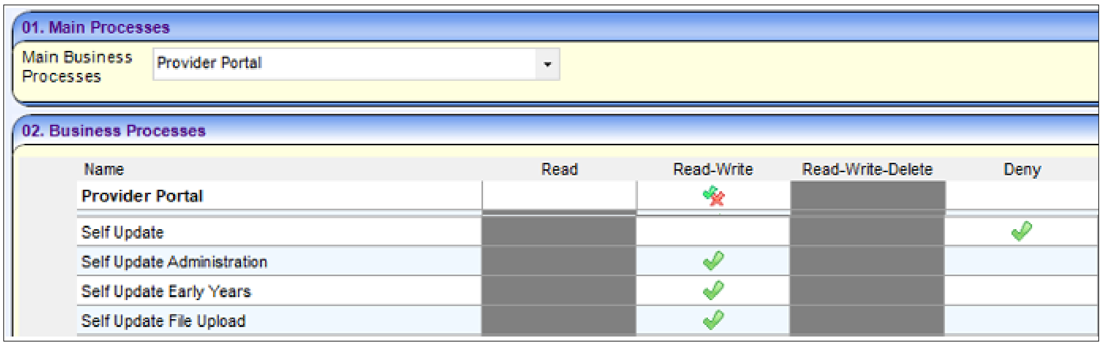


File Upload is a new permission that controls whether users / groups can access the **Provider Self Update Portal |Admin | File Upload** tile. The new permission is called: '***Self Update File Upload'***

To administer File Update on Self Update Provider portal, Read/Write access must be assigned to the following business process:

- Self Update Administration
- Self Update Early Years
- Self Update File Upload

as shown in graphic below.

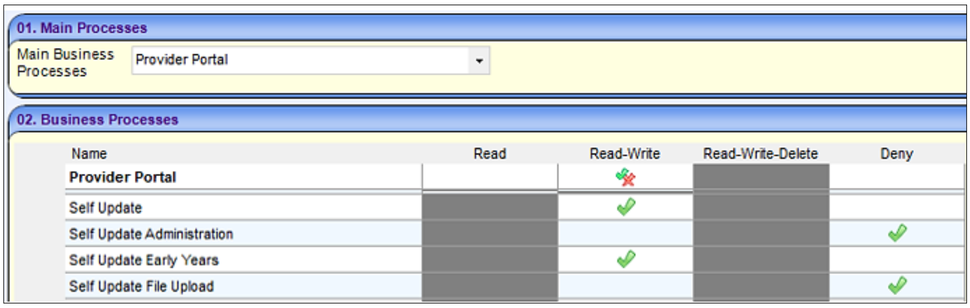


Provider Access

To view and update their details, a provider must be assigned Read/Write access to the following business processes:

- Self Update
- Self Update Early Years

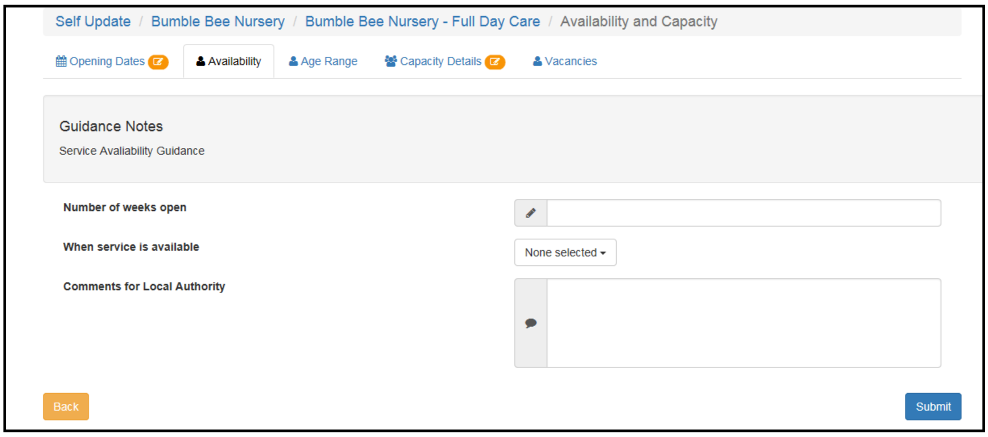
as shown in the following graphic:



Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Portal Administration	Provider Portal	General Site Administrator		✓	
Self Update Administration	Provider Portal	Self Update Administration		✓	
		Self Update Early Years		✓	
		Self Update File Upload		✓	
Self Update Provider User	Provider Portal	Self Update		✓	
		Self Update Early Years		✓	

Guidance Notes

Guidance notes can be added to the top of the Provider Self Update screens so that Local Authority administrators can give instructions to help providers when they are submitting changes for approval.



Local Authoritiy can now configure Guidance notes in areas such as Travel, Availabiluity and capacity, Travel and Cost as follow:

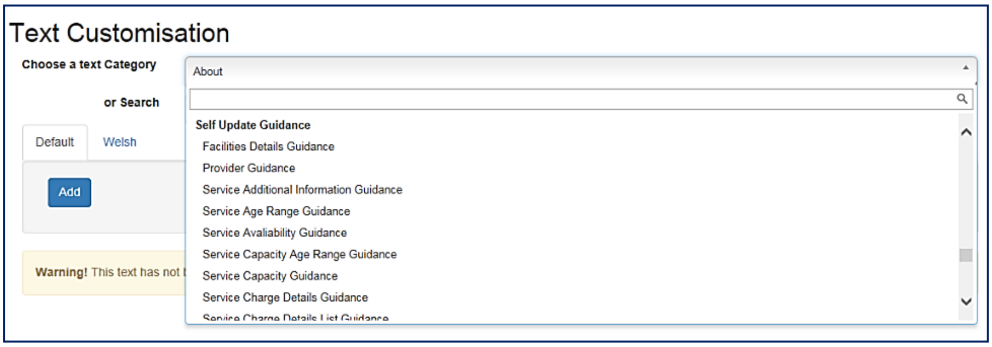
1. On the Home Page, select : **Administration | Text Customisation**
2. Select the dropdown arrow next to **Choose a text Category**.
3. Scroll down and select the following under **Self Update Guidance**

Updating Guidance Notes

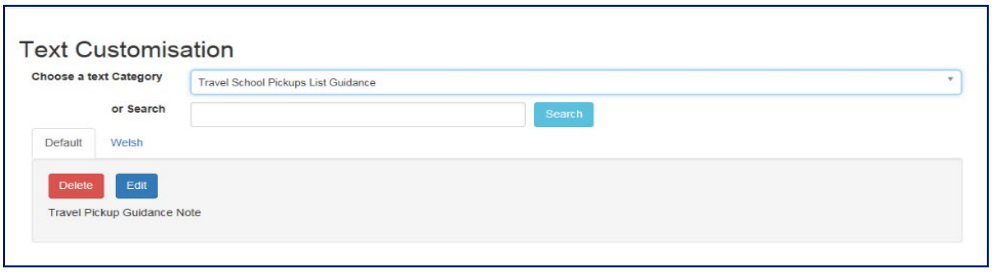
Guidance notes are configured for each screen using the text customisation facility. If no text is saved, the **Guidance Notes** header is not displayed.

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

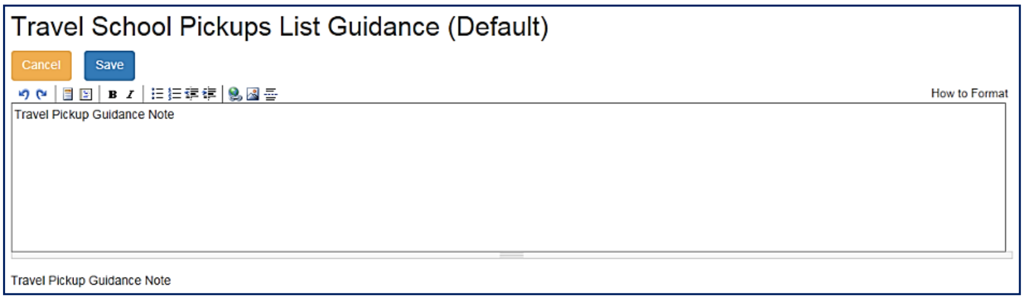
2. Click the drop-down to display a list of available text that can be customised.
3. Scroll to the required list of screens e.g. **Self Update Guidance**.



4. Select the required screen.



5. Click the **Edit** button.



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

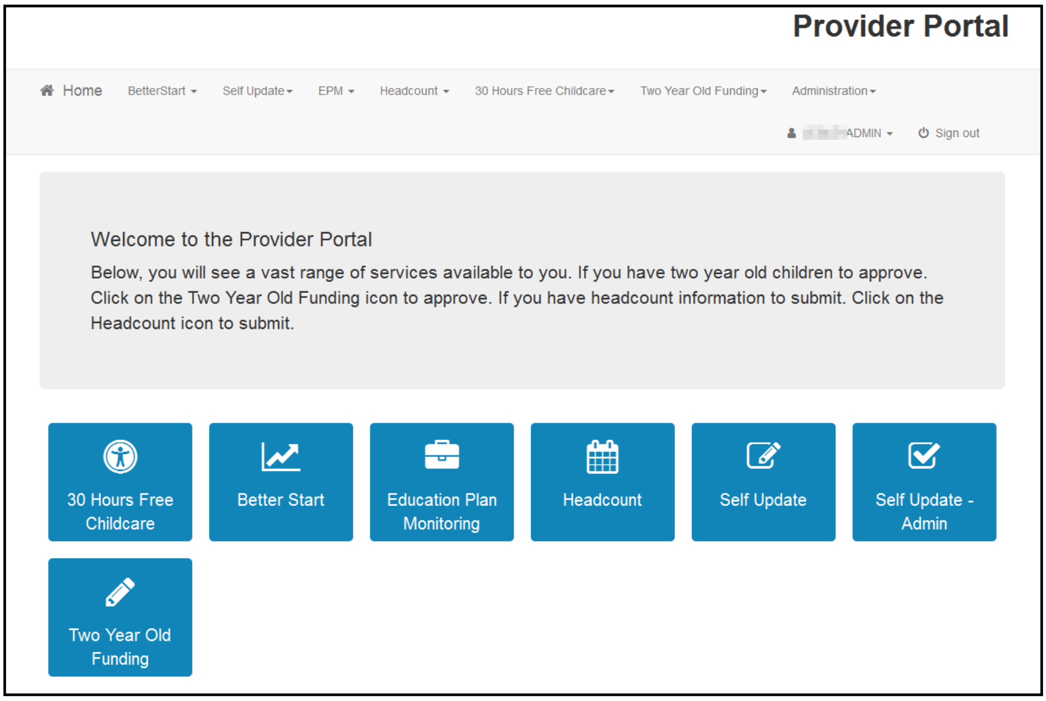
*Note: Guidance notes can be added in **Text Customisation | Self Update Guidance for** Availability and Capacity, Travel, Cost and Facilities.*

04 | Administering the Self Update Provider Portal

Introduction

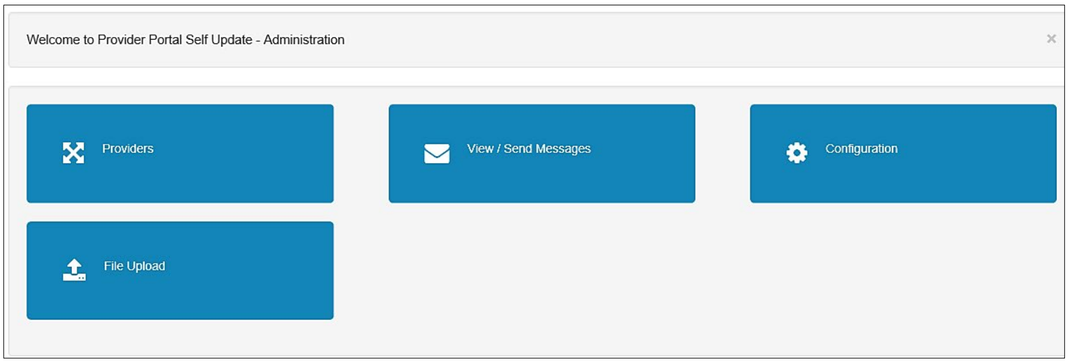
The SUPP administrator can configure the Self Update portal and manage changes to service details submitted by providers.

The Self Update administration area is accessed from the Provider portal home page.



NOTE: *The options and menu routes displayed on the home page are subject to permissions. For more information, see* *Permissions on page 13.*

Click the **Self Update - Admin** tile to display the **Self Update - Administration** page.

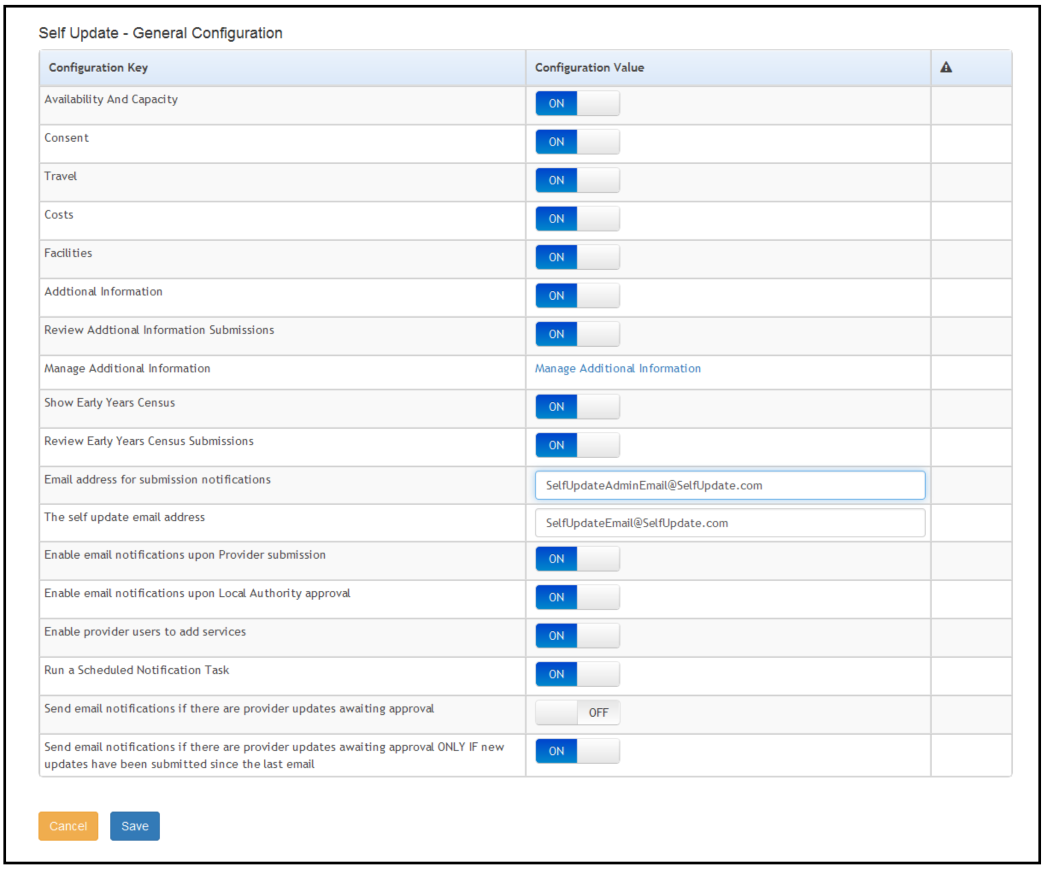


This page gives access to:

- Configure the Self Update portal. For more information, see Configuring the Self Update Portal on page *18*.
- Manage changes submitted by providers. For more information, see Managing Provider Self Updates on page *22*.
- Create and send messages to providers. For more information, see *Sending Messages* on page *38*.

Configuring the Self Update Portal

The **Self Update - General Configuration** page is accessed by clicking the **Configuration** tile on the **Self Update - Administration** page.



This page enables the Local Authority to specify:

- Which information can be viewed and updated via the portal. The following information can be viewed and updated by providers if the **Configuration Value** is set to **ON**:
  - **Availability and Capacity:** This includes opening dates and times, age ranges, capacity, waiting list and vacancy information.
  - **Consent**: This includes consent to share information about the service.
  - **Travel**: This includes parking spaces, own transport and school pickups.
  - **Costs**: This includes service charges and sibling discount.
  - **Facilities**: The facilities supported by the provider.
  - **Additional Information**: Additional information about the service.

- Whether or not the Local Authority can review the additional information submitted by the provider and approve or discard them. If this is set to **OFF**, the additional information submitted by the provider updates the database directly.
- Which additional information can be viewed and updated by providers. Click the **Manage Additional Information** link to display the **Additional Information - Visibility Configuration for Providers** page. For more information, see Managing Additional Information on page *19*.
- Whether or not the provider can view and update their Early Years Census information via the portal and the Local Authority can view and send a reminder message to providers who have not submitted their census.
- Whether or not the Local Authority can review the census information submitted by the provider and approve or discard the changes. If this is set to **OFF**, the census information submitted by the provider updates the database directly.
- The email address used to receive submission notifications.
- The email address used to send feedback.
- Whether or not email notifications will be sent to the configured email address every time a provider makes a submission.
- Whether or not providers can add a new service for approval.
- Whether or not a scheduled task is run to send the email notifications. For more information, see Configuring a Scheduled Notification Task on page *20*.

Updating the General Configuration

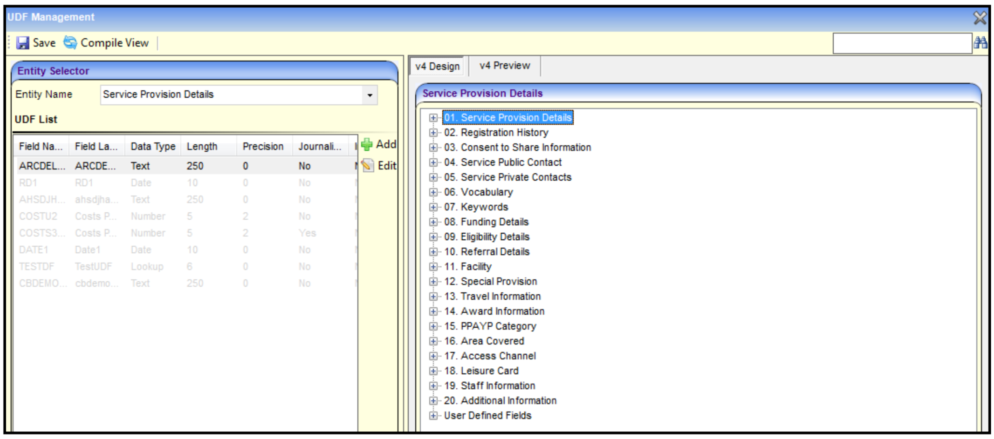
Each **Configuration Key** has a **Configuration Value** which can be updated. If the **Configuration Value** is a button, it can be set to **ON** or **OFF**.

To update the **Configuration Value**:

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.
2. If required, click the **Configuration Value** button, adjacent to the required **Configuration Key** to change the value.
3. If required and **Enable email notifications upon Provider submission** is set to **ON** or **Run a Scheduled Notification Task** is set to **ON**, enter an email address in the **Email address for submission notifications** field.
4. Enter an email address in **The self update email address** field. This is the email address used as the **From** address to send email feedback to both the LA and the provider, e.g. this address is used to send an email to the LA when a provider submits a change to their details and is the address used to send an email to the provider when the LA approves a change. For more information, see Updating Service Details on page *62* and Approving Provider Updates on page *29*.
5. Click the **Save** button.

Managing Additional Information

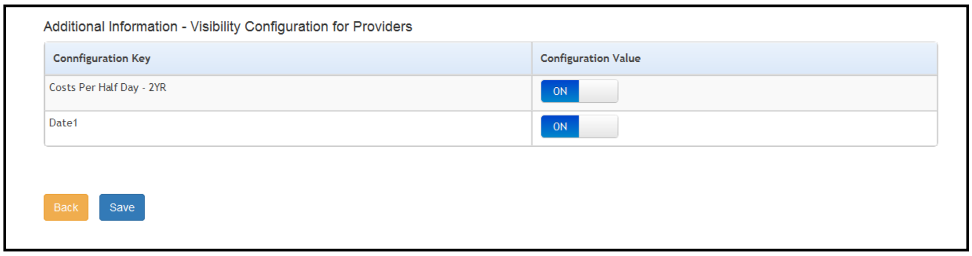
Additional information is defined using UDFs (User Defined Fields) in the One v4 Client via **Tools | Administration | UDF Management**. A UDF must be defined under **Service Provision Details | Additional Information** for the **Configuration Key** to be displayed in the Self Update portal.



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

The Local Authority configures the Self Update portal to determine which additional information to display to providers.

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.
2. Click the **Manage Additional Information** link to display the **Additional Information - Visibility Configuration for Providers** page.



NOTE: *The **Configuration Key**s that are displayed are the UDFs that are defined for the **Service Provision Details | Additional Information** panel in the One v4 Client via **Tools | Administration | UDF Management**.*

3. If required, click the **Configuration Value** button, adjacent to the required **Configuration Key** to change the value. If the **Configuration Value** is set to **ON**, the information is displayed to providers.
4. Click the **Save** button.

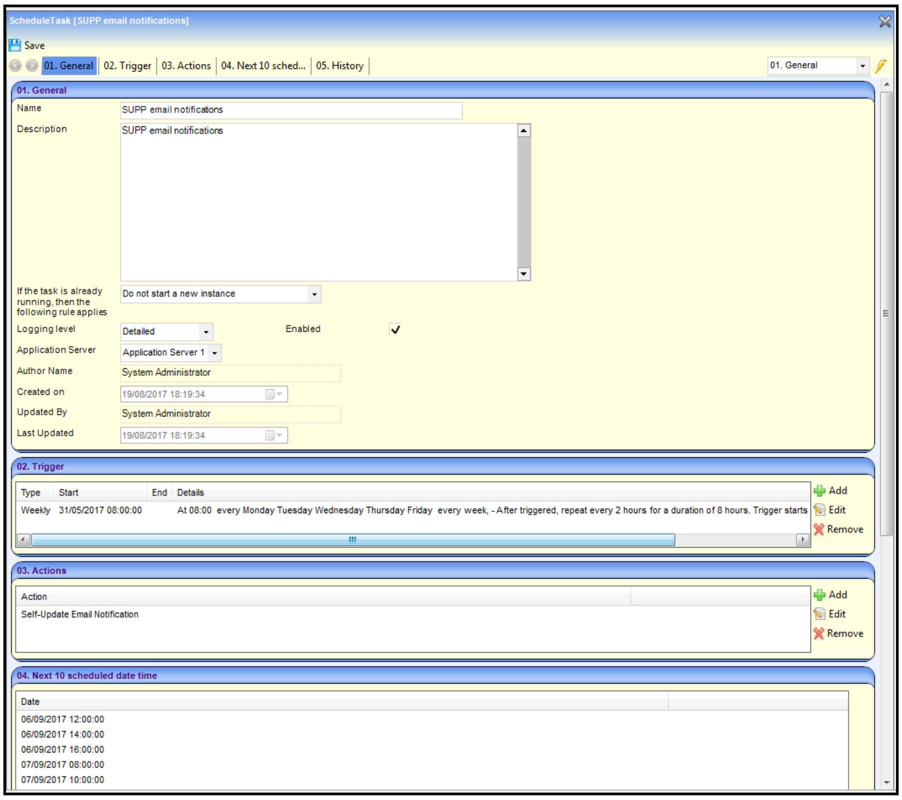
NOTE: *At least one **Configuration Value** must be set to **ON**. If all values are set to **OFF** the changes cannot be saved.*

Configuring a Scheduled Notification Task

The Local Authority can choose to configure the portal to run a scheduled task in the background. The scheduled task is triggered at a specified time to send an email to the configured email address if any provider updates have been submitted and are awaiting approval. It can be configured to either send email notifications whenever there are provider updates awaiting approval or to only send email notifications if new updates have been submitted since the last email.

If required, the Local Authority can configure the portal to run the scheduled task instead of sending an email every time a provider submits a single page. Alternatively, the LA can configure the portal to also send email notifications upon provider submission.

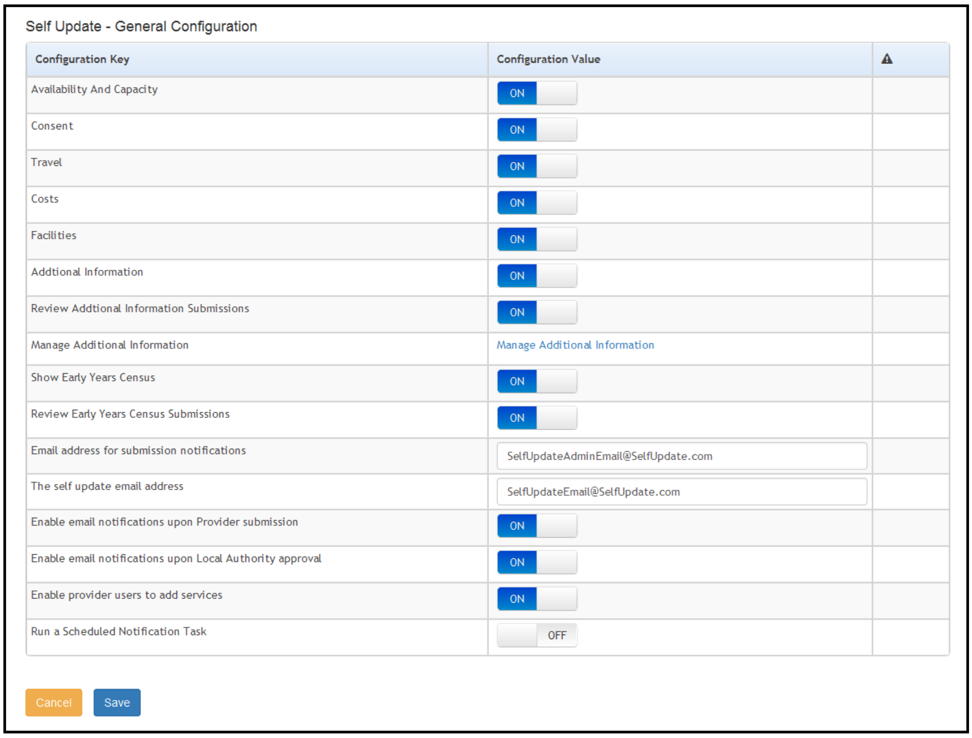
An implementation task automatically sets up the scheduled task as defined in the following graphic. The Local Authority can change the configuration of the task in the One v4 Client via **Tools | Administration | Schedule Task**.



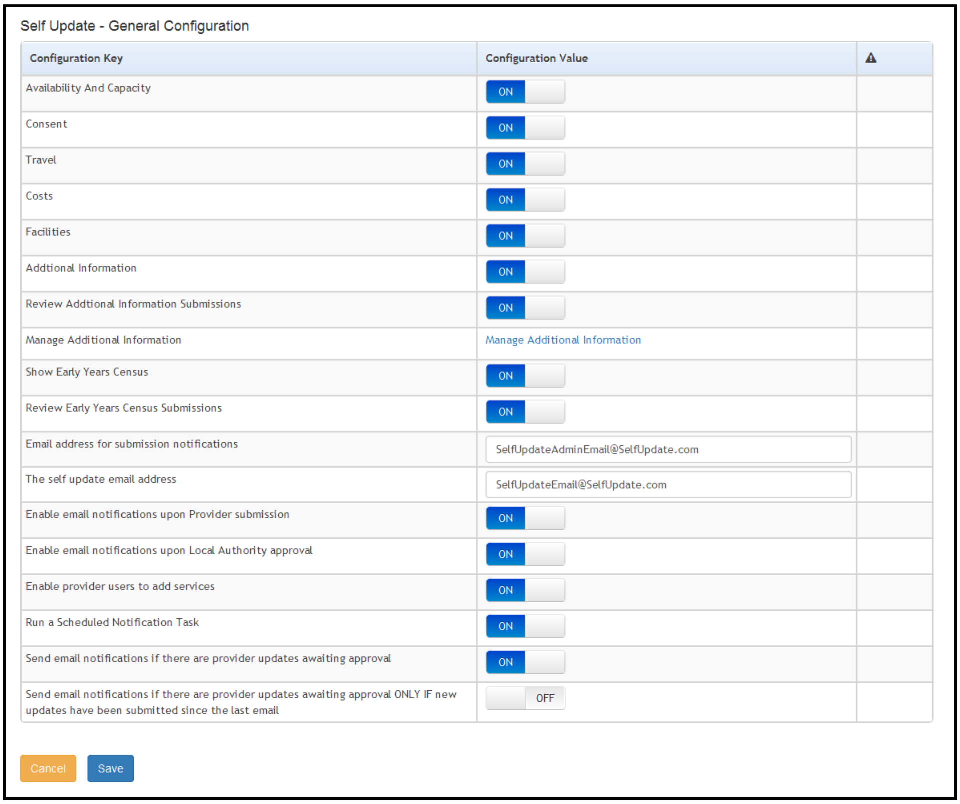
More Information: *v4 Scheduled Tasks* technical guide available on the One Publications website.

To configure the portal to run a scheduled notification task:

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.



2. Set the **Configuration Value** adjacent to **Run a Scheduled Notification Task** to **ON**. The **Configuration Value** of **Send email notifications if there are provider updates awaiting approval** is initially set to **ON.**



Self Update - General Configuration

Configuration Key	Configuration Value	
Availability And Capacity	ON	
Consent	ON	
Travel	ON	
Costs	ON	
Facilities	ON	
Addtional Information	ON	
Review Addtional Information Submissions	ON	
Manage Additional Information	Manage Additional Information	
Show Early Years Census	ON	
Review Early Years Census Submissions	ON	
Email address for submission notifications	SelfUpdateAdminEmail@SelfUpdate.com	
The self update email address	SelfUpdateEmail@SelfUpdate.com	
Enable email notifications upon Provider submission	ON	
Enable email notifications upon Local Authority approval	ON	
Enable provider users to add services	ON	
Run a Scheduled Notification Task	ON	
Send email notifications if there are provider updates awaiting approval	ON	
Send email notifications if there are provider updates awaiting approval ONLY IF new updates have been submitted since the last email	OFF	

Cancel Save

3. If required, set **Send email notifications if there are provider updates awaiting approval ONLY if new updates have been submitted since the last email** to **ON**.
4. If required, set **Enable email notifications upon Provider submissions** to **OFF**.
5. Click the **Save** button.

Sending Email Notifications

If **Run a Scheduled Notification Task** is set to **ON**, an email is sent to the email address specified in the **Email address for submission notifications** field.

The format of the email notification sent is as follows:

> Subject: SUPP - notification of submitted Provider updates requiring approval.
>
> You have requested to be notified if there are provider updates awaiting approval [and new updates have been submitted since the last email].
>
> At [time] on [date], there are [nnn] providers awaiting approval.
>
> [nnn] pages from [nnn] providers have been submitted since the previous update.

NOTE: *The statement, [and new updates have been submitted since the last email], is omitted from the notification if* ***Send email notifications if there are provider updates awaiting approval*** *is set to* ***On****.*

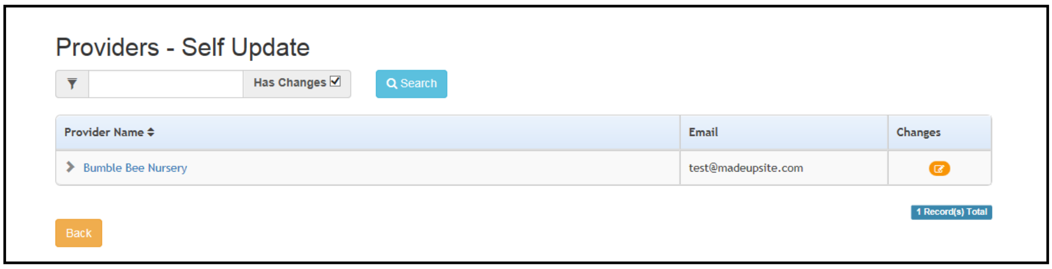
Managing Provider Self Updates

The **Providers - Self Update** page is accessed by clicking the **Providers** tile on the **Self Update - Administration** page. It is used by the Local Authority to view changes submitted by providers using the Self Update portal and decide how to action them. For each of the submissions, the LA can approve, reject, edit or overwrite the changes.

Viewing Provider Self Updates

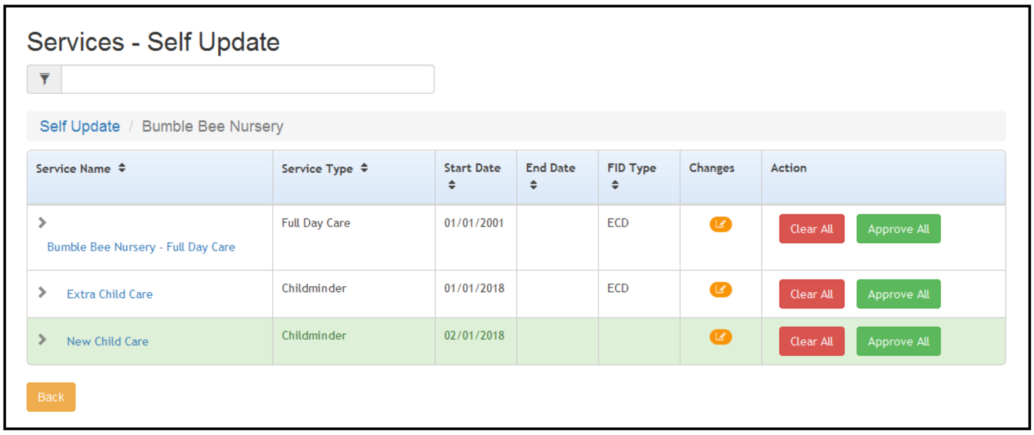
To view the changes submitted by providers:

1. Select **Admin Home** from the **Self Update** menu to display the **Self Update - Administration** page.
2. Click the **Providers** button to display the **Providers - Self Update** page with a list of providers to which you have access.



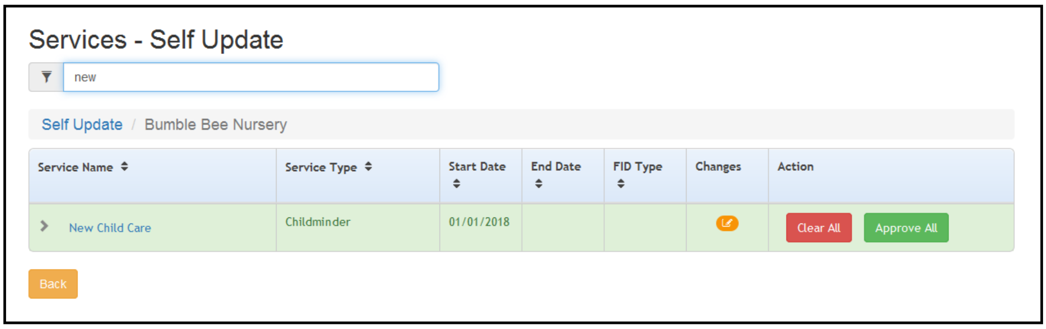
The **Has Changes** check box is automatically selected to display only the providers who have submitted changes. The **Pending changes** icon is displayed in the **Changes** column.

3. If required, enter one or more characters into the search and click the **Search** button to filter the list of providers.
4. Click the required **Provider Name** link to display the **Services - Self Update** page with a list of services at this provider.

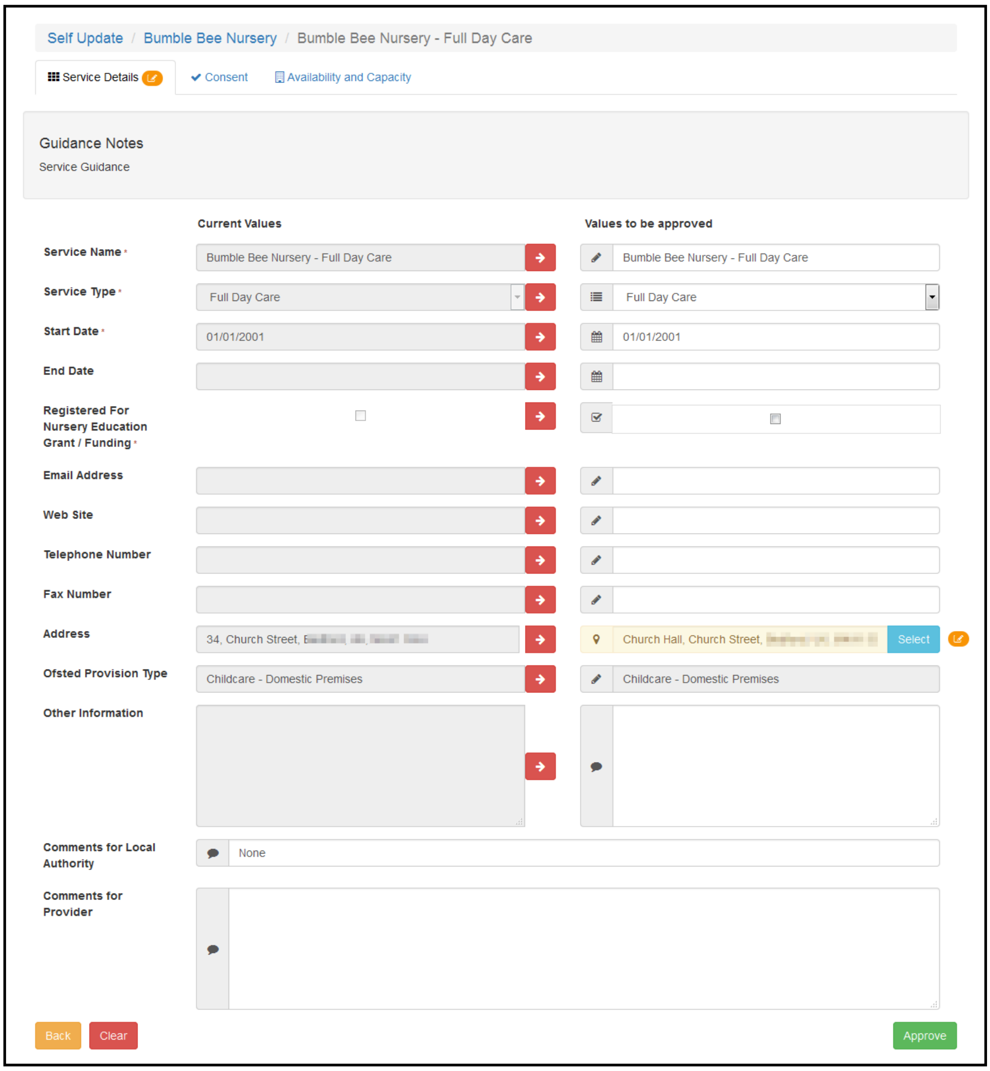


The **Pending changes** icon is displayed in the **Changes** column if there are changes for this service.

5. If required, enter one or more characters into the search to automatically filter the list of services.

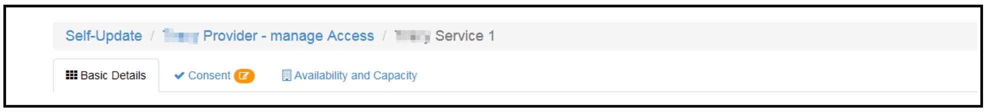


6. Click the required **Service Name** link to display the **Self Update** page with the **Service Details** tab displayed.

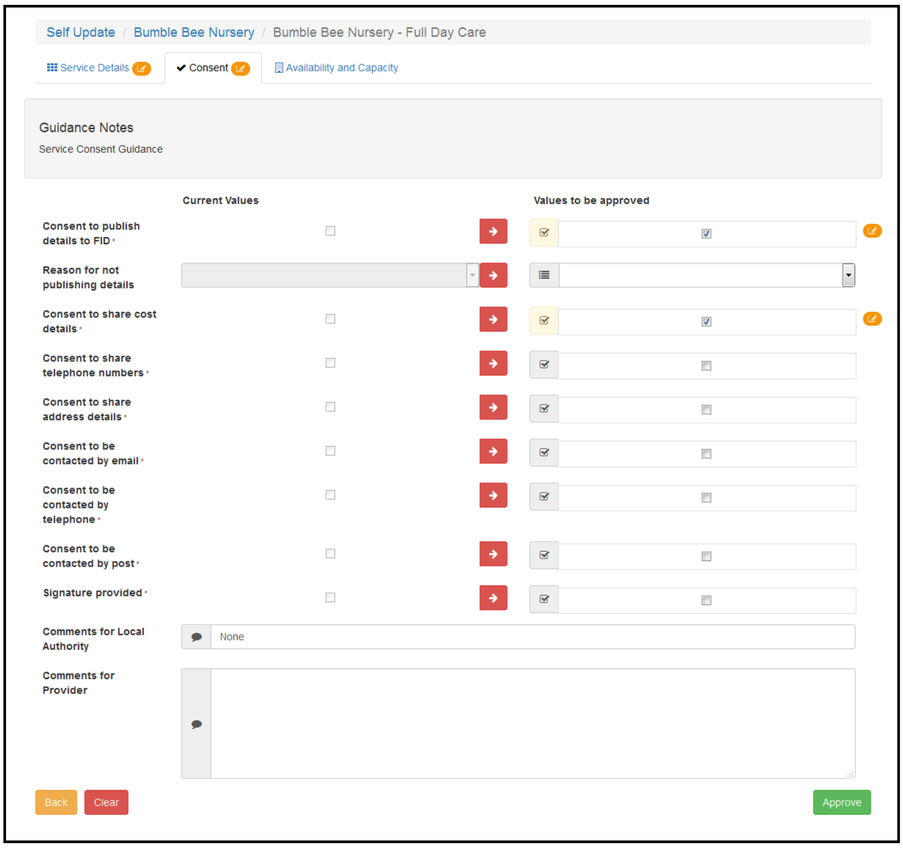


The **Current Values** column displays the values currently held in One. The **Values to be approved** column displays the values submitted by the provider. Changes are highlighted, and the **Pending changes** icon is displayed next to the field.

The **Pending changes** icon is displayed on the tab if changes to that information are pending approval. The following graphic shows changes pending on the **Consent** tab:

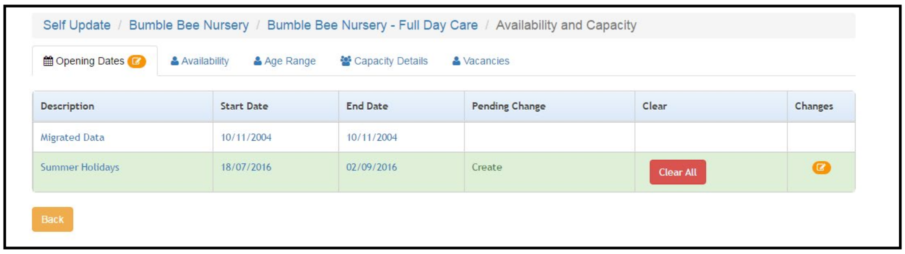


7. If required, select the **Consent** tab to view changes to the consent to share information about the service.



8. If required, select the **Availability and Capacity** tab to view changes to the opening dates, availability, age ranges, capacity and vacancies.

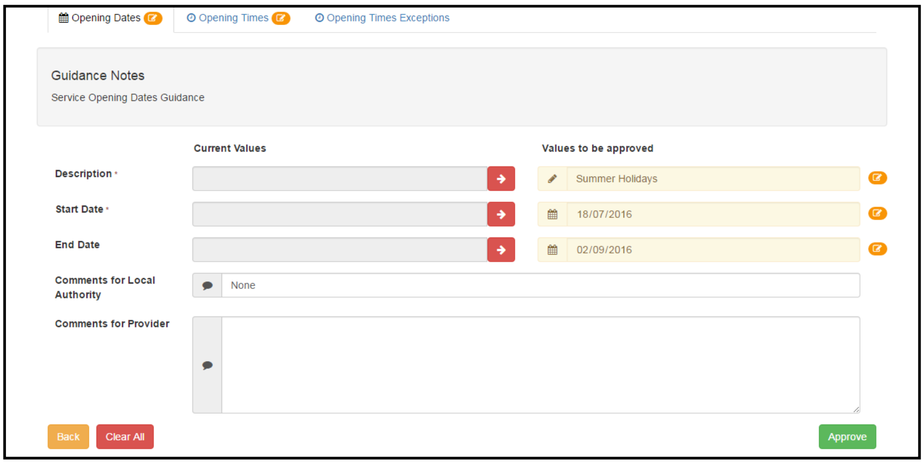
   The following graphic shows that there are pending changes to the **Opening Dates** information. The opening date that has changed is highlighted and the pending changes icon is displayed in the **Changes** column.



   To view changes to the opening dates:

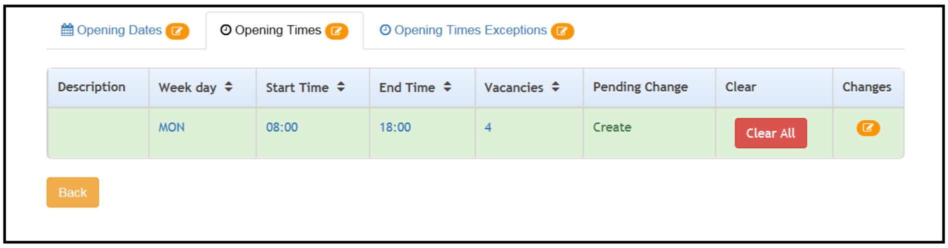
   a. Ensure that the **Opening Dates** tab is selected.

   b. Click the link on the **Description** to display the details.

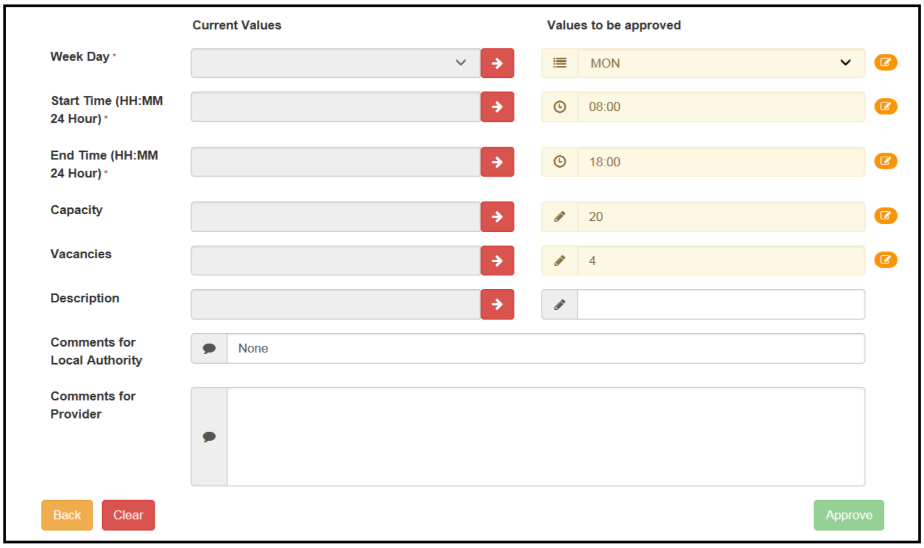


If there are any changes to **Opening Times** or **Opening Times Exceptions**, the pending changes icon is displayed on the tab.

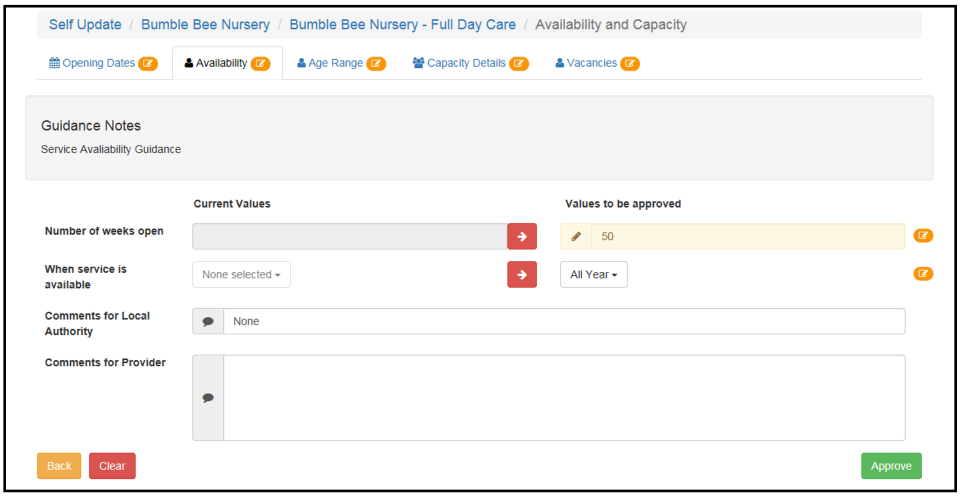
c. Select the required tab to view the changes.



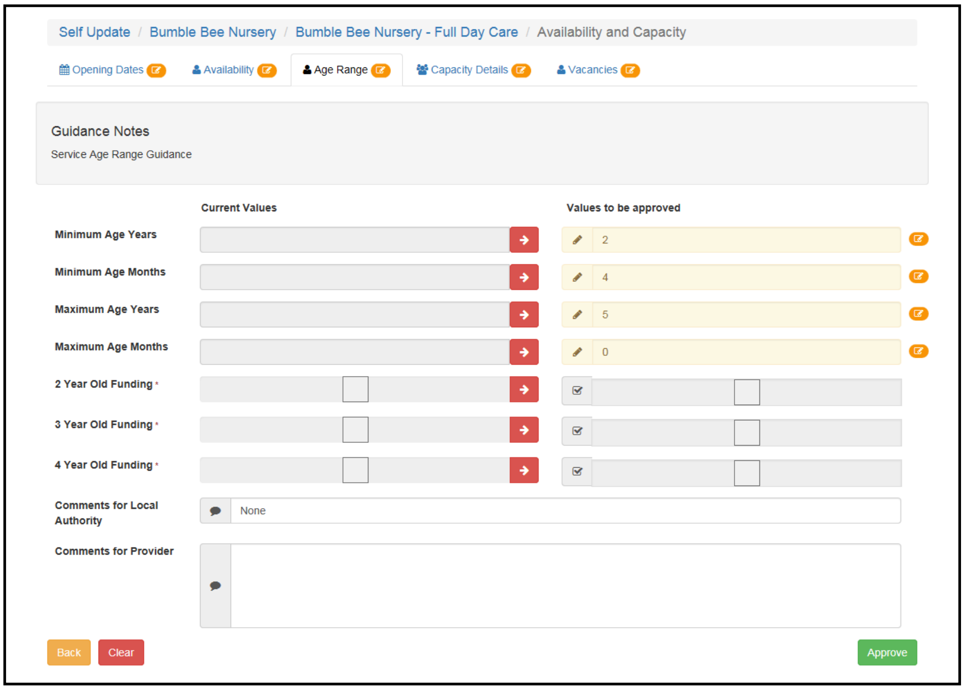
d. Click the link for the required change to display **Current Values** and **Values to be approved**.



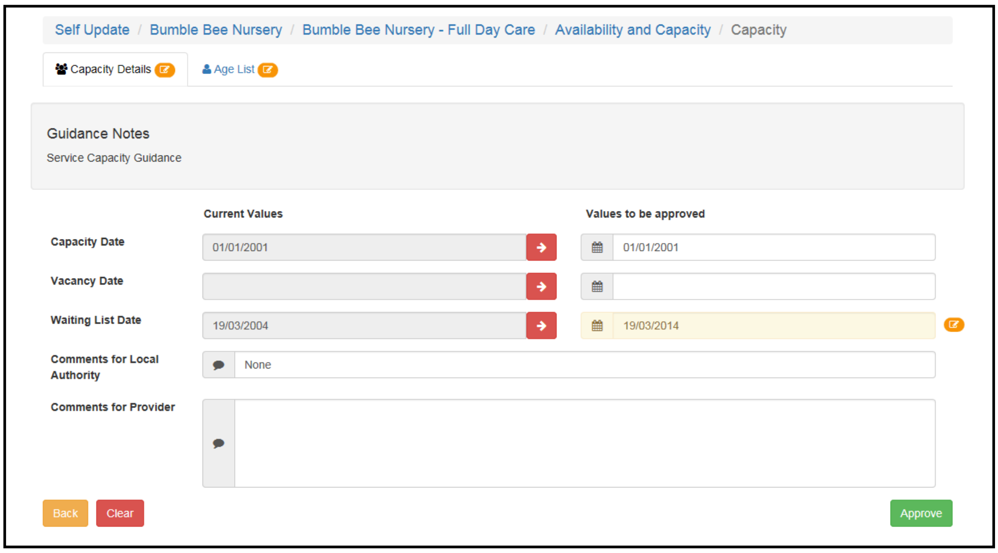
To view changes to the availability of the service, select the **Availability** tab.



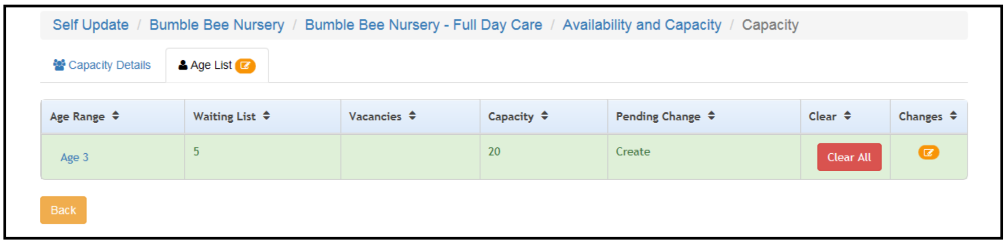
To view changes to the minimum and maximum ages and funding at the service, select the **Age Range** tab.



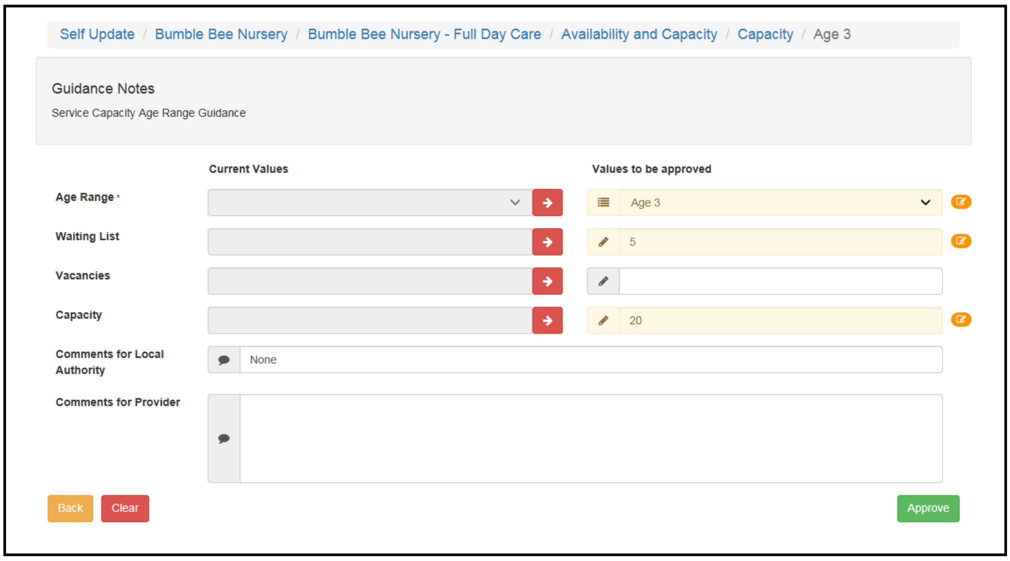
To view changes to the capacity, vacancy and waiting list information for the service, select the **Capacity Details** tab.



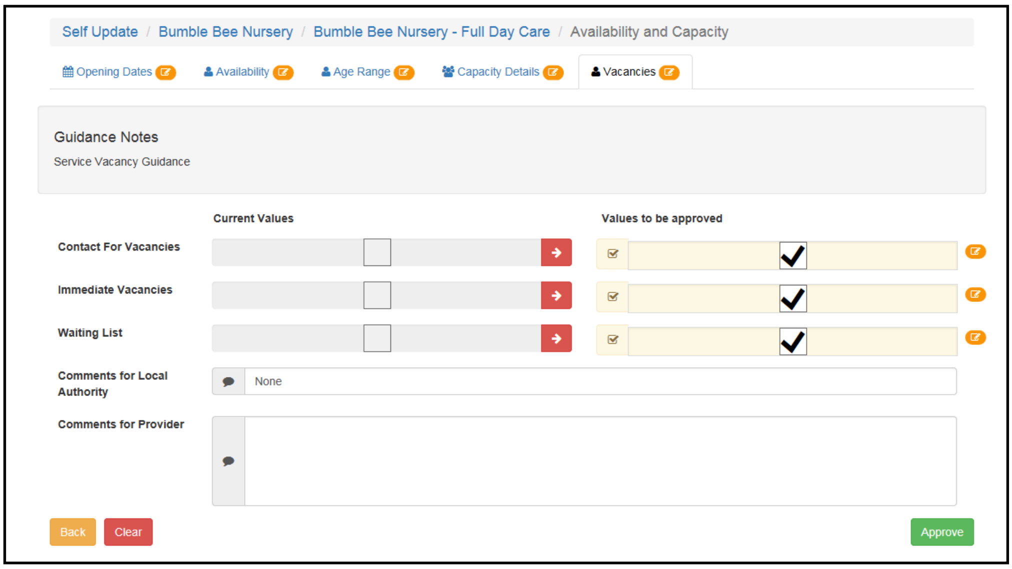
To display changes to capacity information for one or more age ranges, select the **Age List** tab.



If there are any changes for a particular **Age Range**, the pending changes icon is displayed in the **Changes** column. To display the changes, click the **Age Range** link.



To view changes to the vacancies at the service, select the **Vacancies** tab.



Approving Provider Updates

Changes submitted by providers need to be approved by the Local Authority before the One database is updated. The Local Authority can approve all changes made by a provider or can approve the changes on each tab page individually.

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the registered email addresses of all Provider portal users who have made a submission. The From email address for the email is set via **The self update email address** option. For more information, see Configuring the Self Update Portal on page *18*.

The email contains the following information:

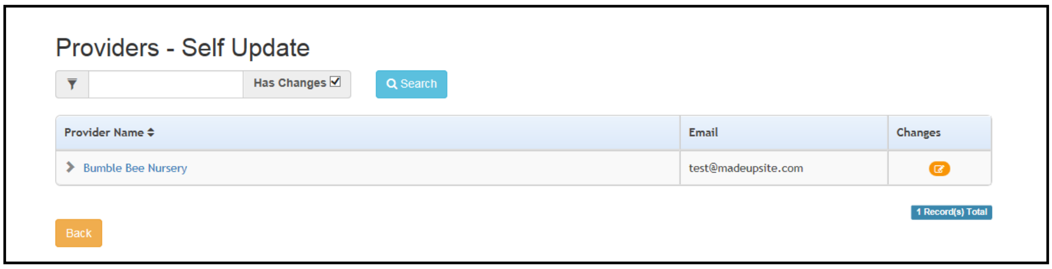
> Your request to [*Create/Update/Delete*] [*Submission area e.g. Consent*] for [*Service name*] at [*Provider name*] has been reviewed.
>
> [*Comments for Provider*]
>
> To view the information held [*Service name*] at [*Provider name*], please visit Self Update on the Provider Portal.

NOTE: *The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the* ***Self Update On Approve Email Template*** *page via* ***Provider Portal | Administration | Site Setup | Message Templates****. For more information, see* *Message Templates on page 7.*

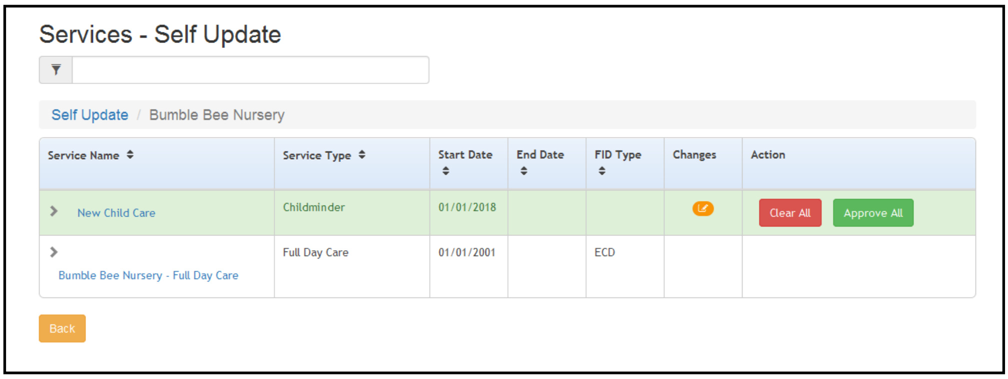
Approving All Changes

To approve all changes for a service:

1. Select **Admin Home** from the **Self Update** menu to display the **Self Update - Administration** page.
2. Click the **Providers** button to display the **Providers - Self Update** page with a list of providers to which you have access.



3. The **Has Changes** check box is automatically selected to display only the providers who have submitted changes. The **Pending changes** icon is displayed in the **Changes** column.
4. If required, enter one or more characters into the search and click the **Search** button to filter the list of providers.
5. Click the required **Provider Name** link to display the **Services - Self Update** page with a list of services at this provider.



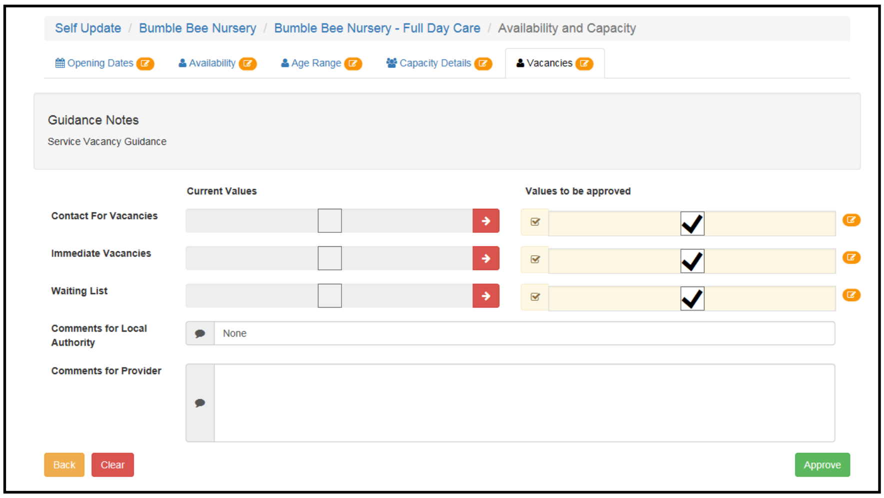
6. Click the **Approve All** button.

Approving Individual Changes

To approve the changes made on each tab page individually:

1. View the updates submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page *23*.

   The **pending changes** icon is displayed on a tab if changes to that information are pending approval.
2. Select the required tab.



The fields highlighted in the **Values to be approved** column are changes submitted by the provider.

> ***NOTE:*** *If the provider has submitted a new address for the service which is not on the One database, the address is flagged as **New**. This address must be added to the One database via the v4 Client before the change can be approved.*

3. If required, click the arrow adjacent to the **Current Value** to overwrite one or more changes with the current value in the One database. For more information, see Overwriting Provider Updates on page *31*.
4. To approve the changes and update the value in the One database, click the **Approve** button.

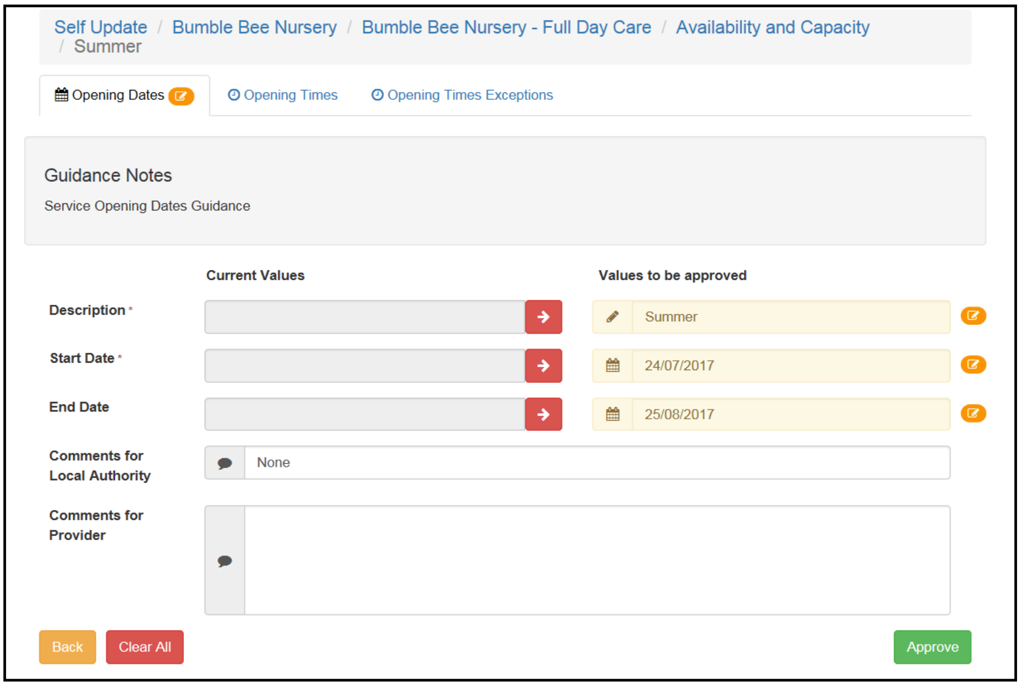
> ***NOTE:*** *If the provider has deselected the **Offers Extended Childcare** check box and extended hours have been recorded for the current term, when this change is approved it only affects the next term with no extended hours recorded. If there is no future term defined, the following message is displayed: Either remove the extended hours within the <Term Name> or define the future period.*

Overwriting Provider Updates

The Local Authority can overwrite the values submitted by the provider with those currently held in the One database. Alternatively, you can clear all the changes on that tab.

To overwrite provider updates:

1. View the changes submitted by a provider. For more information, see Viewing Provider Self Updates on page *23*.



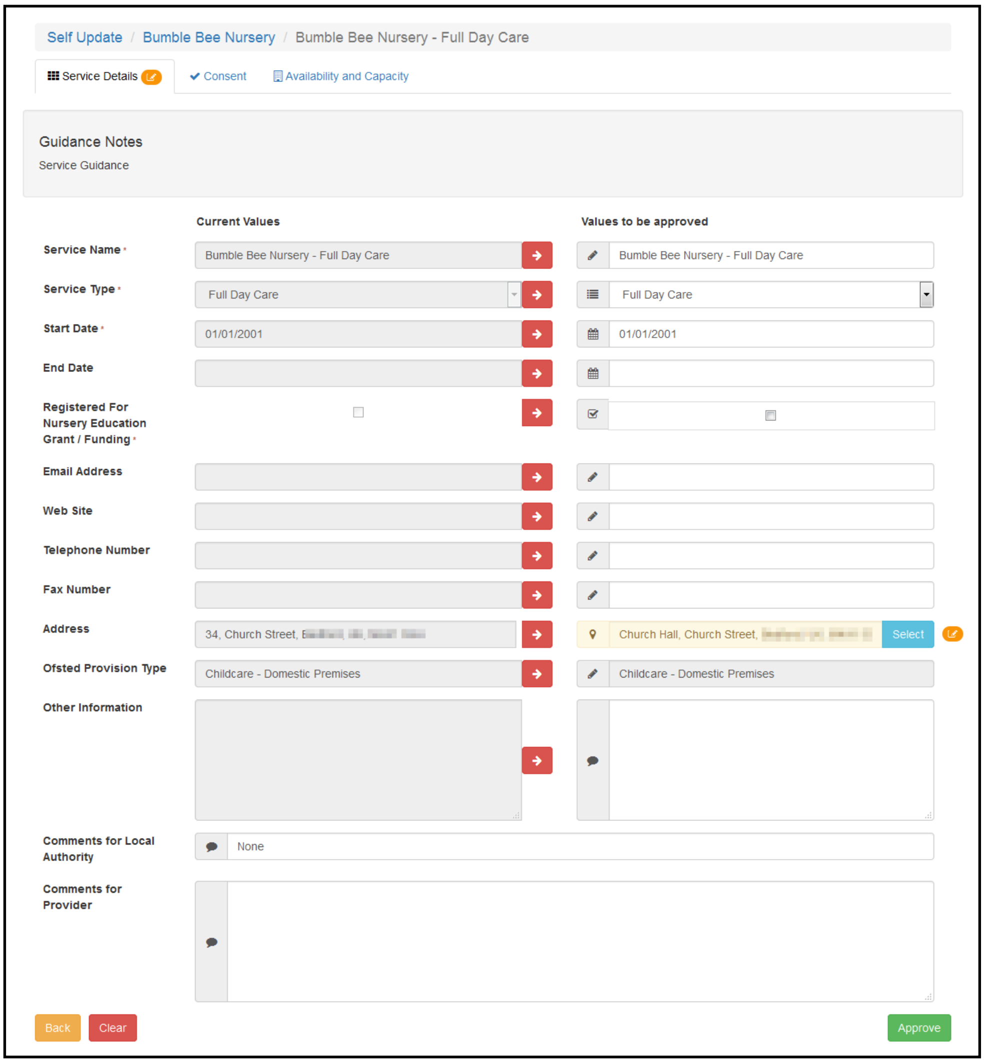
2. Click the arrow adjacent to the **Current Value** to overwrite the value in the **Value to be approved** column.

   Alternatively, to clear all changes on the tab, click the **Clear All** button.
3. To approve the remaining changes, if any, click the **Approve** button.

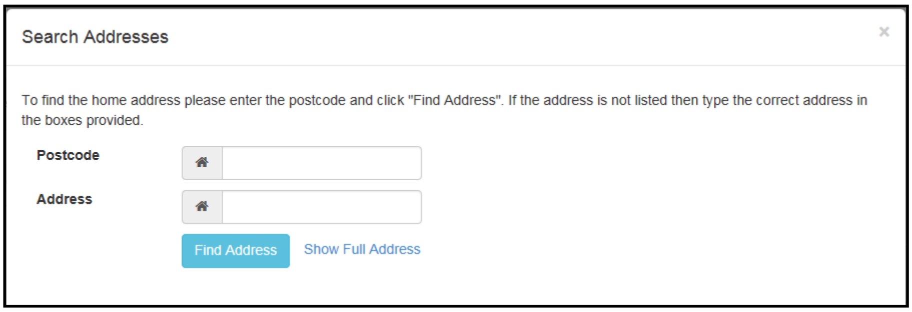
Editing Provider Updates

The Local Authority can edit the information before approving the changes.

1. View the updates submitted by a provider. For more information, see Viewing Provider Self Updates on page *23*.



2. If required, make changes to the information in the **Values to be approved** column.
3. If required, select a different address for the service:
   a. Click the **Select** button to display the **Search Addresses** dialog.



   b. Enter search criteria and click the **Find Address** button to display a list of matching addresses.
   c. Select the required address.

Alternatively, if the required address is not found, click the **Show Full Address** link to display the address fields and enter the address manually.

> ***NOTE:*** *A new address must be added to the One database via the v4 Client before the change can be approved.*

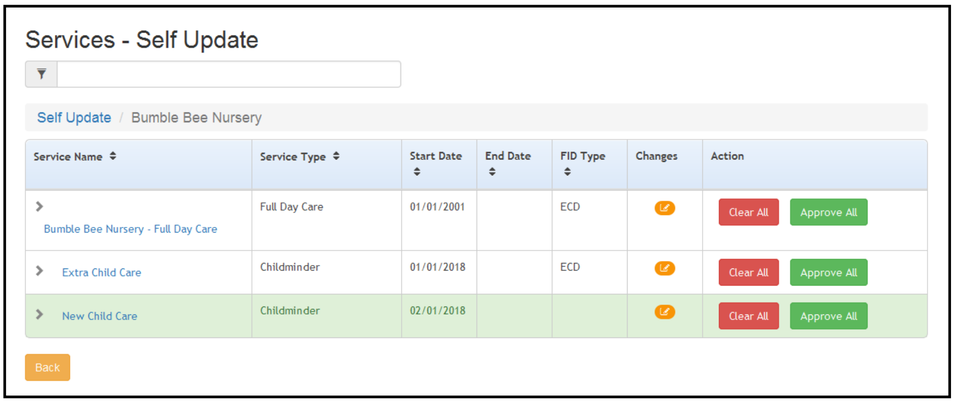
4. To approve the changes and update the **Current Values** column, click the **Approve** button.

Rejecting Provider Updates

The Local Authority can reject all changes made to the service details by a provider and set the values back to the One values. Alternatively, they can reject all changes on a particular tab.

1. Select **Admin Home** from the **Self Update** menu to display the **Self Update - Administration** page.
2. Click the **Providers** button to display the **Providers - Self Update** page with a list of providers to which you have access.

   The **Has Changes** check box is automatically selected to display only the providers who have submitted changes.
3. If required, enter one or more characters into the search to automatically filter the list of providers.
4. Click the required **Provider Name** link to display the **Services - Self Update** page with a list of services at this provider.

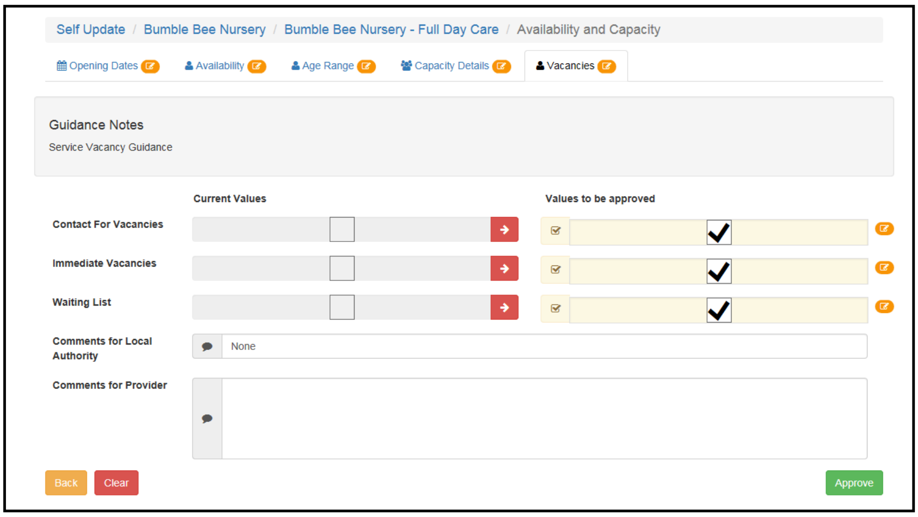


   The **Pending changes** icon is displayed in the **Changes** column and the **Clear All** button is displayed in the **Action** column if there are pending changes for this service.
5. To reject all the proposed changes for this service, click the **Clear All** button.

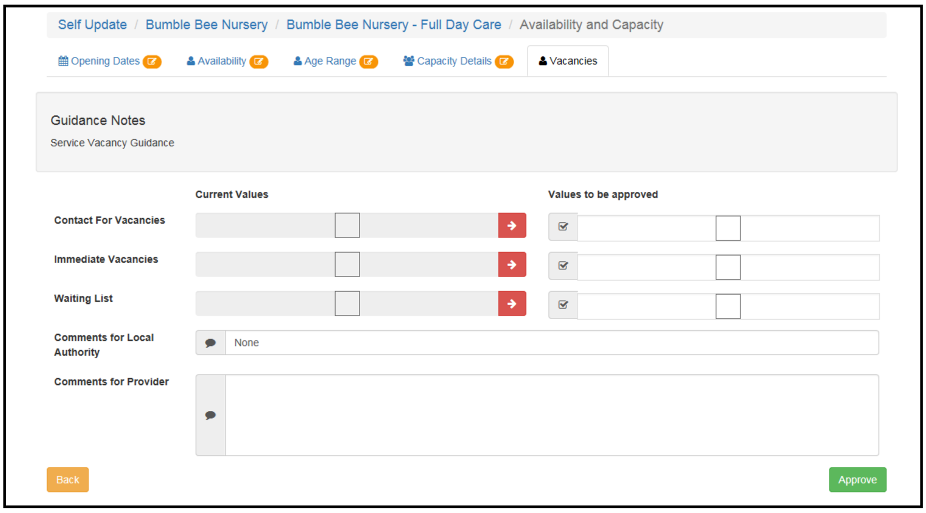
   Alternatively, to reject proposed changes on a particular tab:

   a. Click the **Service Name** link to display the details.

   b. Select the required tab.

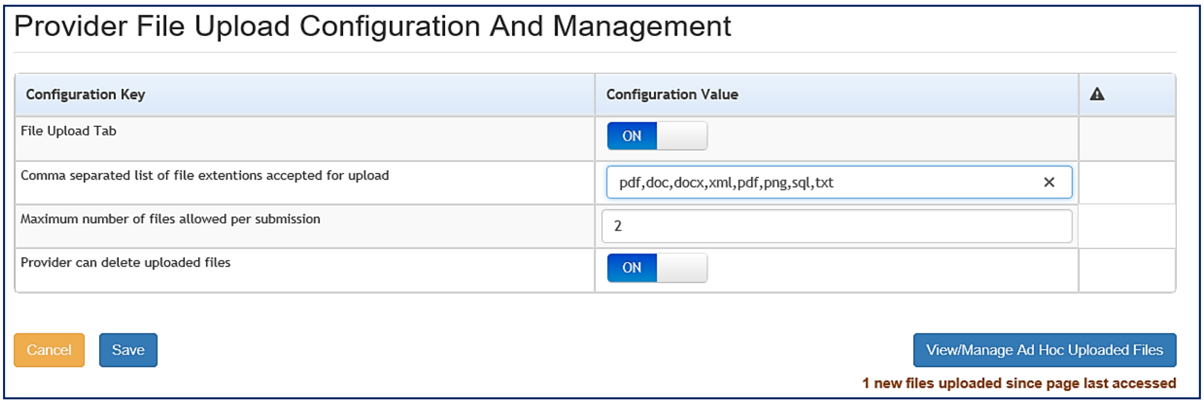


c. Click the **Clear** button to clear the changes.



Managing and Configuring File Upload

Local authorities can manage and configure file upload via the **Provider File Upload Configuration and Management** page which is accessed by clicking the **File Upload** tile on the **Self Update - Administration** page. It is used by the Local Authority to configure the options for Providers to upload file(s) against their services and send them to their local authority.



Local authority staff, through a few configuration options can control whether providers will have the ability to upload files or not. If they are allowed, then the authority can specify which file type extensions, the number of files that can be uploaded per service in one submission (between 1 and 5) and whether providers can delete the files they have uploaded or not.

These values can be set as follow:

File Upload Tab

- **ON** = The File Upload tab will be visible to all Providers
- **OFF** = The File Upload tab will not visible to all Providers

Comma Separated List

- Each file extension entered must be separated by a comma to be accepted. Example pdf, doc, docx etc.

Maximum Number of Files per submission

- The maximum value that can be set is 1 - 5.

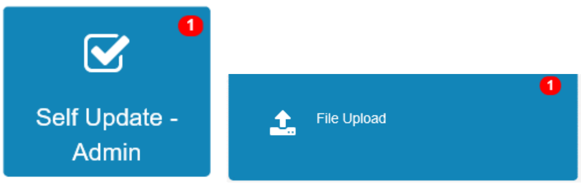
Provider can delete uploaded files

- **ON** = Provider is given the option to delete uploaded files
- **OFF** = The Delete option will not be visible to the Provider on the

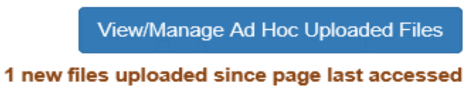
  'Files previously uploaded to the LA' screen.

Managing Providers Uploaded Files

Local Authorities are notified when a File has been uploaded by a Provider by a number appearing on the **Self Update Admin** tile and **File Upload** tile.

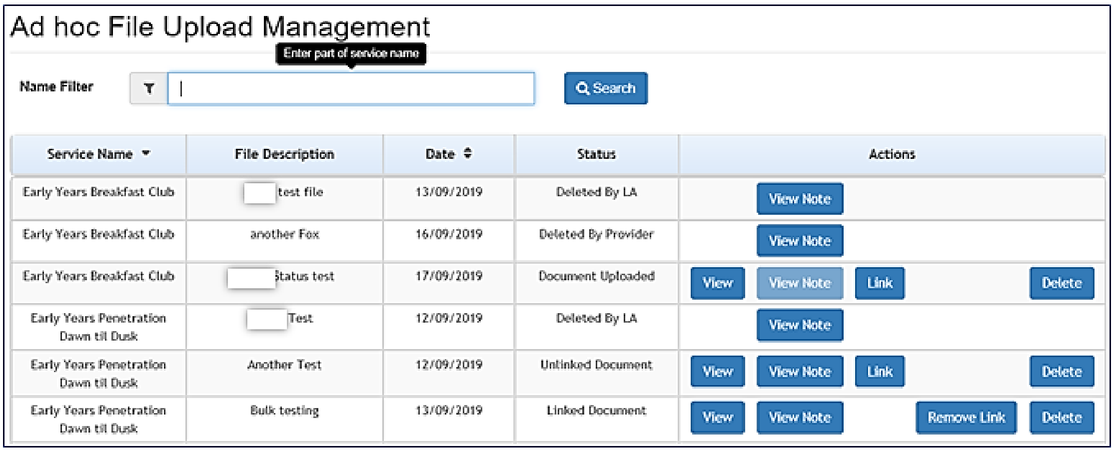


The Uploaded file can then be managed by the authority via the **View/Manage Ad Hoc Uploaded Files** button in the bottom right corner of the **Provider File Upload Configuration and Management** screen. A message of how many new files has been uploaded since the page was last accessed is also displayed. See graphic below.



Local authority staff (with appropriate permissions) can manage the files that have been uploaded by providers and choose whether to view them, delete them or link them as a linked document against the services record in the v4 client via **Focus | Early Years | Search for Service Provision | Service Details | Linked Documents**

The ***Ad hoc File Upload Management*** screen provides various information and Actions that can be taken with the Uploaded files.



The information that appears in each column are detailed below:

Service Name: This is the name of the Provider Service the Uploaded file is from.

File Description: A description of the file sent.

Date: Date the LA received the File.

Status: There are 4 different Status that can be displayed for a file, which are as follow:

- **Document Uploaded**, File received from Provider.
- **Linked Document** –The file received has been Linked to the Service record in v4 Client.
- **Unlinked Document** – The document has been unlinked from the record in v4 Client.
- **Deleted by LA /Deleted by Provider** – This displays which entity deleted the file.

Actions: There are 5 actions as follow:

- **View** – The Uploaded file can be Viewed or downloaded to the Users system.
- **View Note** - This displays any message the Provider may add with the Uploaded file.
- **Link** – This gives the option to link the file to the Service record in v4 Client.
- **Remove Link –** This Unlink the file in v4 Client.
- **Delete -** An uploaded file can be deleted by either the Local Authority or the Provider. A confirmation, popup box will appear when this option is selected as follow:

- If **Yes** is selected a confirmation box will appear to confirm the file was successfully deleted. The Status panel will then display Deleted by LA.

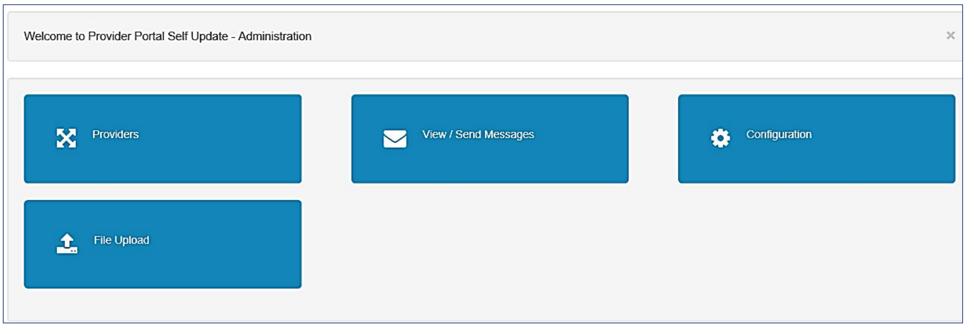
Sending Messages

Introduction

The **Self Update | Messages** menu route enables the Local Authority Early Years administrator to compose messages to Self Update users and to view a log of messages sent.

> ***NOTE:*** *A reminder message can be sent to providers who have not submitted their census information. If the local authority has configured the portal so that* **Show Early Years Census** *is set to* **ON**, *you can filter the list of providers to display only those that have or have not submitted their census.*
>
> *For more information about configuring the Self Update portal, see* *Configuring the Self Update Portal on page 18.*

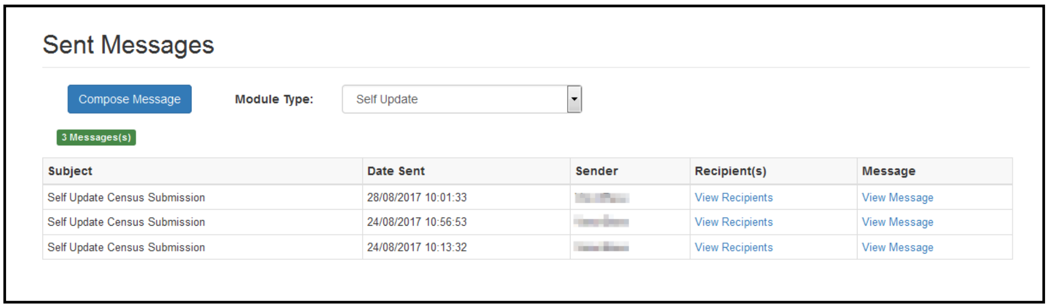
The **View / Send Messages** tile is displayed on the Self Update Administration welcome page.



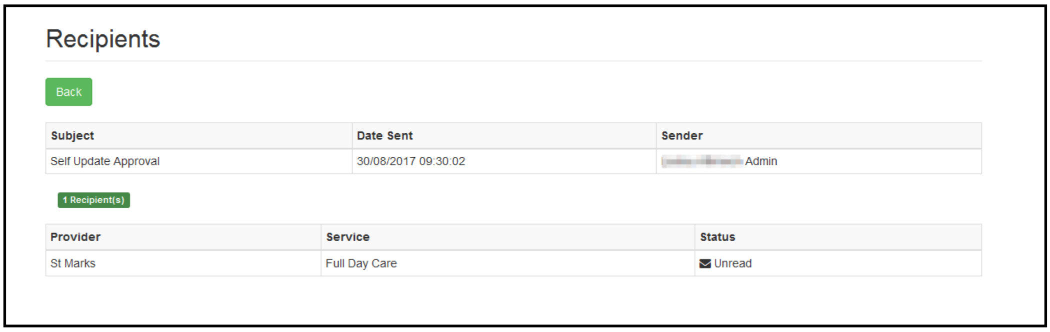
Viewing Sent Messages

A list of messages sent to Self Update users is displayed when the Early Years administrator clicks the **View / Send Messages** tile or selects **Messages** from the **Self Update** menu.

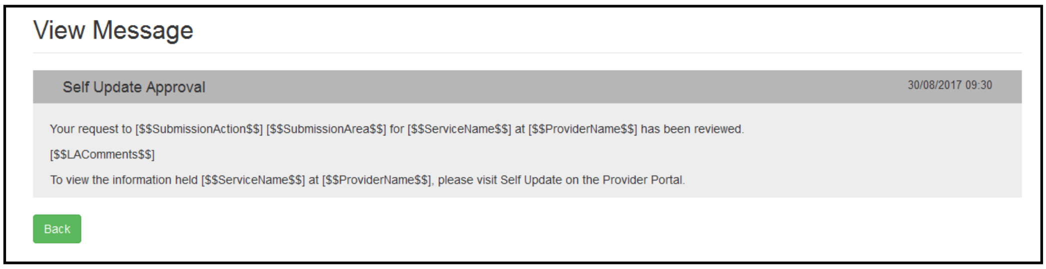
1. Select **Messages** from the **Self Update** menu to display the **Sent Messages** page. The **Module Type** drop-down defaults to **Self Update**.



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



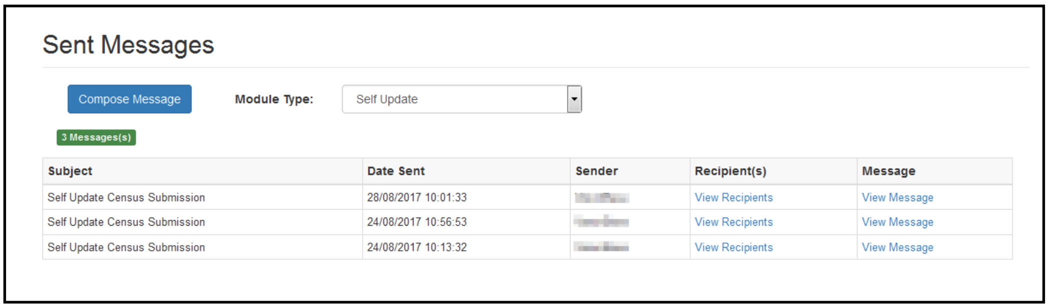
Alternatively, to view the recipients of a message, click the **View Recipients** link to display the **Recipients** page.



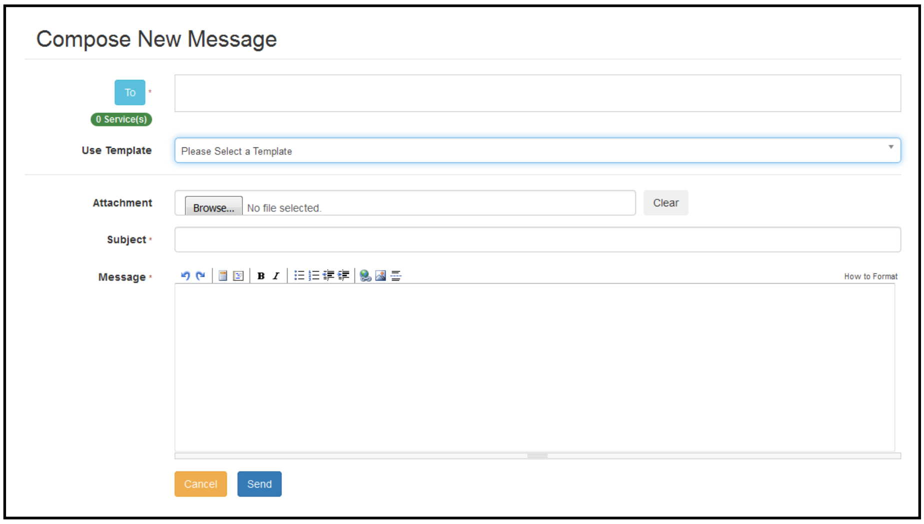
Composing a New Message

To compose and send a new message to a service provider, the Early Years administrator clicks the **View / Send Messages** tile or selects **Messages** from the **Self Update** menu.

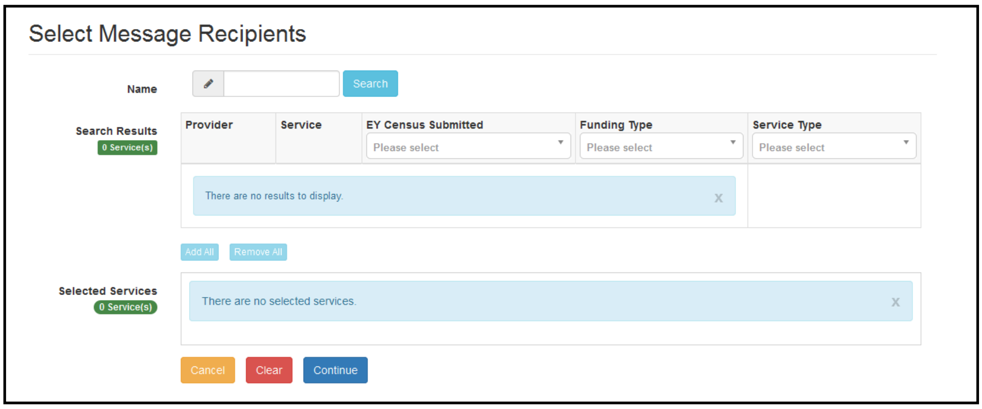
1. Select **Messages** from the **Self Update** menu to display the **Sent Messages** page. The **Module Type** drop-down defaults to **Self Update**.



2. Click the **Compose Message** button to display the **Compose New Message** page.

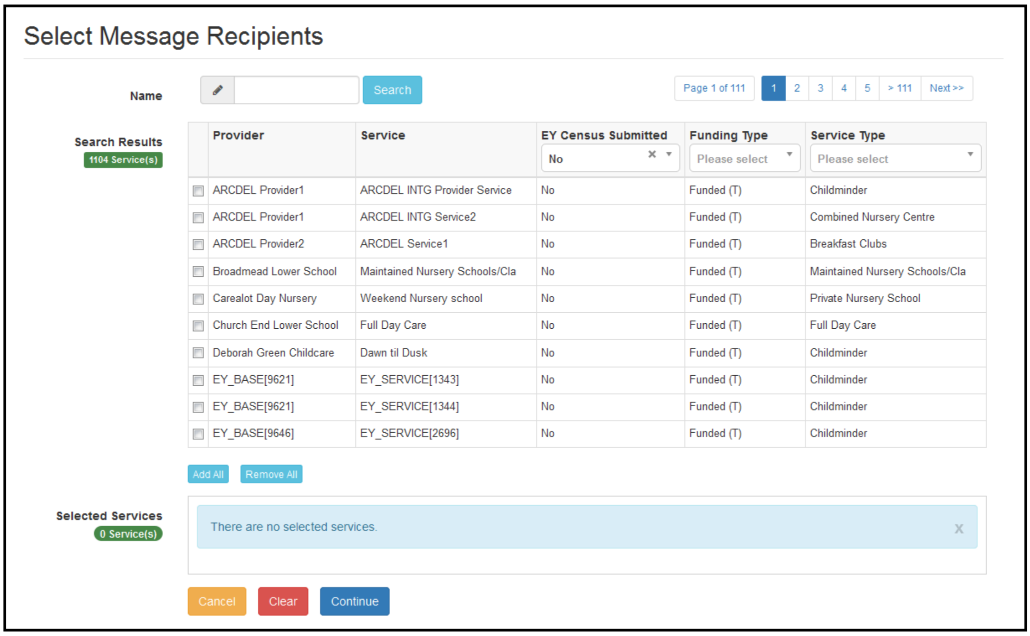


3. Click the **To** button to display the **Select Message Recipients** dialog.



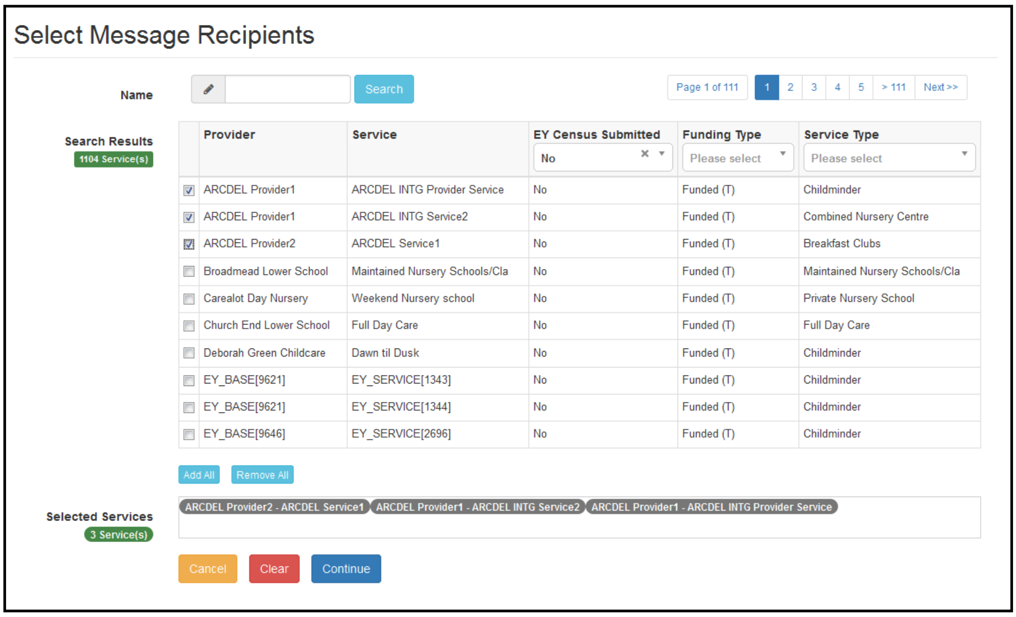
> ***NOTE:*** *The **EY Census Submitted** column is only displayed if **Show Early Years Census** is set to **ON** on the **Self Update - General Configuration** page.*

4. Enter a full or partial provider or service **Name** and click the **Search** button to display a list of matching services in the **Search Results**. Alternatively, select a service group from the **Service** drop-down. Refine the search further by applying an **EY Census Submitted** status, **Funding Type** or **Service Type** filter.

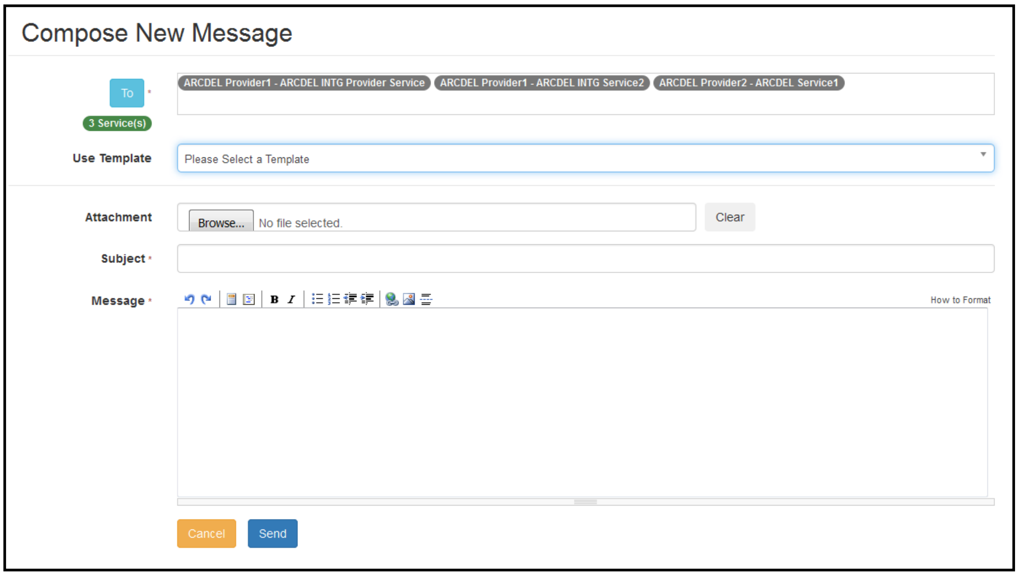


> ***NOTES:*** *To send a reminder message to providers who have not submitted their census, select all services for that provider.*
>
> *If the provider clicks the **No Changes Required** button, the **EY Census Submitted** status is set to **Yes**.*

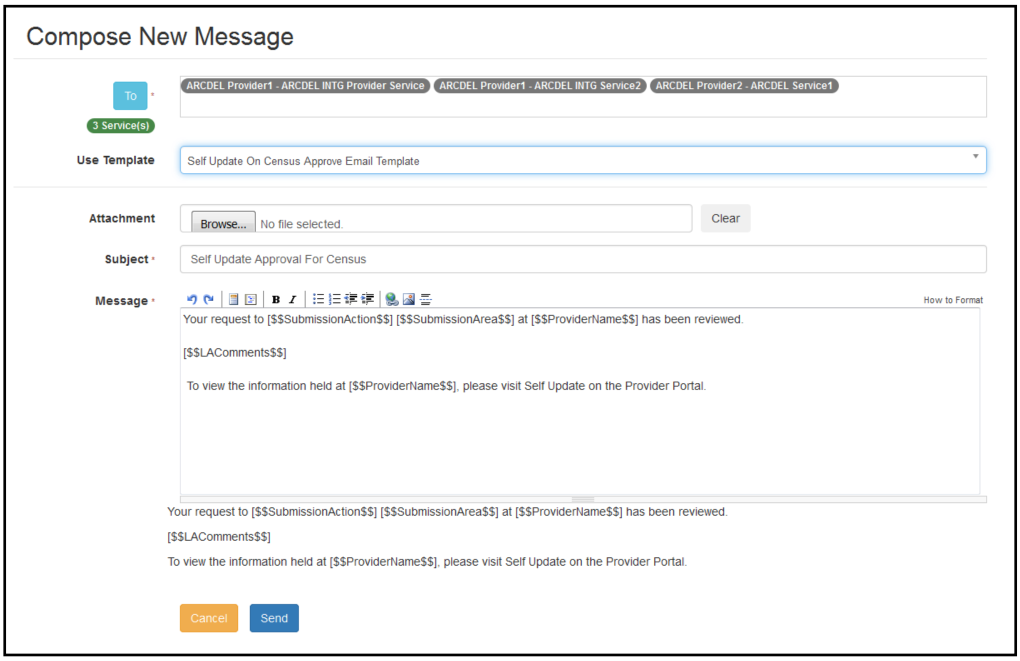
5. Select one or more services to display the service name in the **Selected Services** box, or click the **Add All** button to select all of the services found.



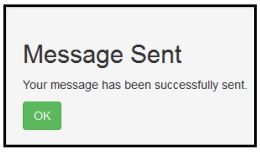
6. After selecting all required recipients, click the **Continue** button to display the **Compose New Message** dialog.



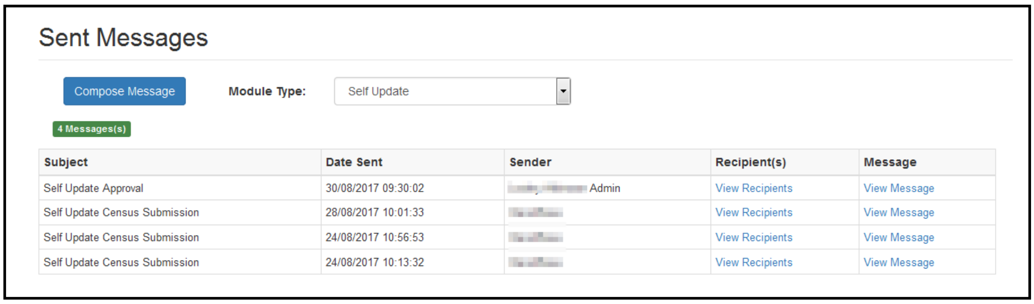
7. Select a message **Template** to automatically complete the **Subject** and the **Message**. If required, edit the text in these fields.



8. If required, click the **Browse** button to select an **Attachment**.
9. Click the **Send** button to send the message and display the **Message Sent** dialog.



10. Click the **OK** button to display the **Sent Messages** page.



05 | Using the Self Update Provider Portal

Introduction

This chapter describes how the Early Years provider uses the Self-Update portal to view and update the information held about their services in the One v4 Client.

If they are new to the Provider portal, the user needs to activate their user account using the login details sent to them by the One administrator. If they are already a Provider portal user, they can log in as normal.

Activating a Portal User Account

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

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

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

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

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

Logging into the Portal

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

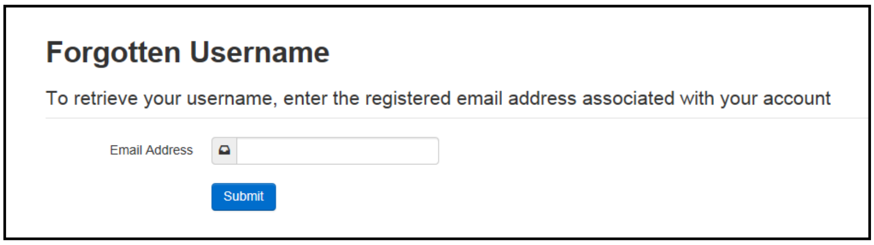
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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

Retrieving Your User Name

If you forget your user name:

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

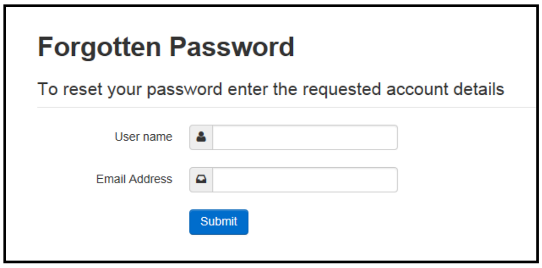


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

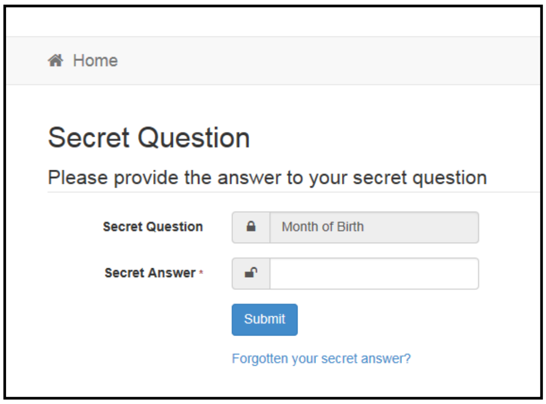
Resetting Your Portal Password

To reset your password:

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



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



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

Resetting Your Secret Question

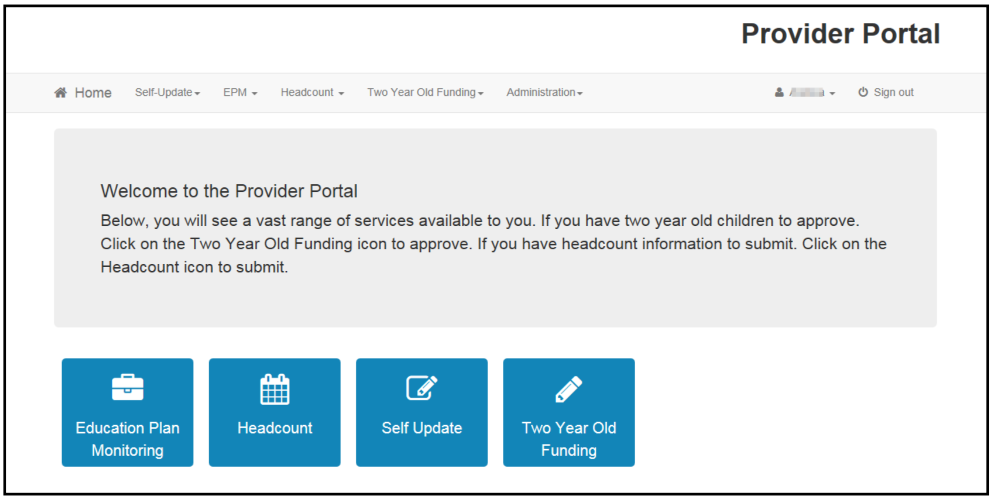
If you need to reset your secret question:

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

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

Accessing the Self Update Portal

The Provider portal home page gives access to the Self Update portal.



When a provider logs on to the Provider portal, the **Self Update** tile and the **Self Update | Provider Home** menu route are displayed on their Welcome page.

Setting Up Two Step Verification

Introduction

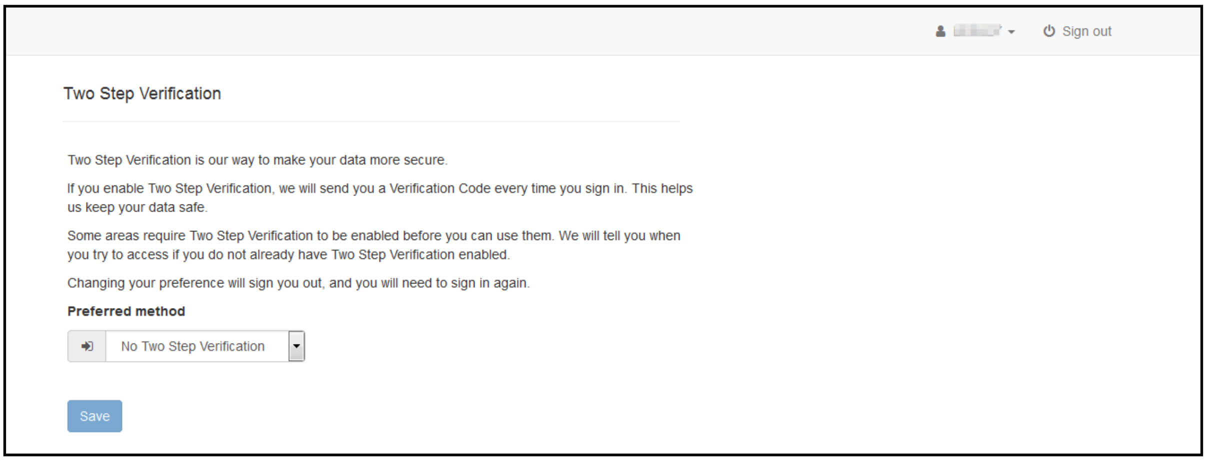
If two step verification is enabled, you will be sent a verification code every time you sign in.

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

Enabling Two Step Verification

To enable two step verification:

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



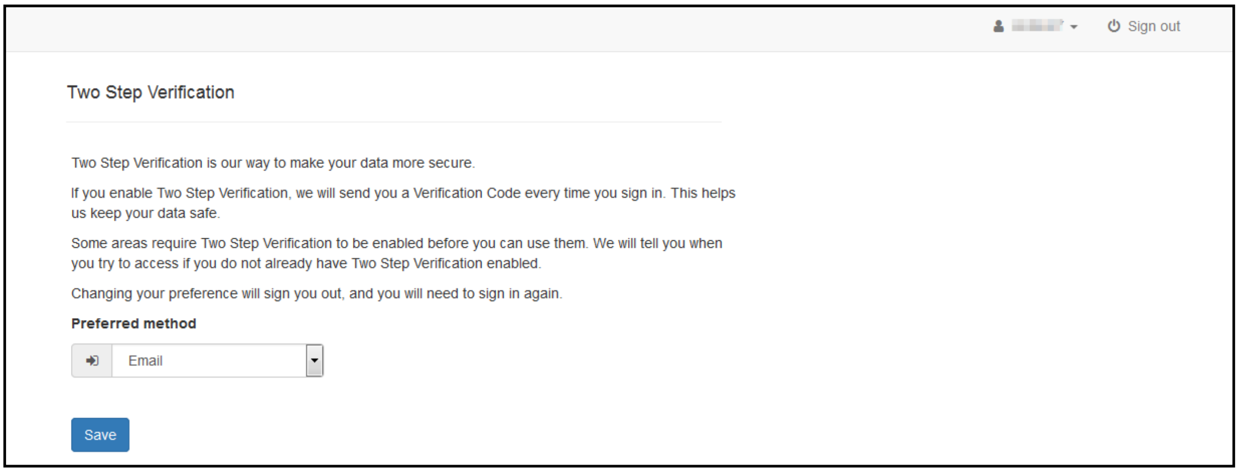
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

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

Disabling Two Step Verification

To disable two step verification:

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



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

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

Viewing and Updating Census Details

Introduction

The Local Authority runs a routine each year in the v4 Client to generate the Early Years Census and pre-populate the census details. The details can be updated in the v4 Client, or the Early Years provider can update the details themselves using the Self Update portal.

NOTE: *For the provider to enter and update the census details, the Local Authority must set the* ***Show Early Years Census*** *configuration value to* ***On*** *via the configuration screen. For more information, see* *Configuring the Self Update Portal on page 18.*

The Local Authority can send a message via the portal to those providers who have not submitted their census. If there are no changes, the provider clicks the **No Changes Required** button.

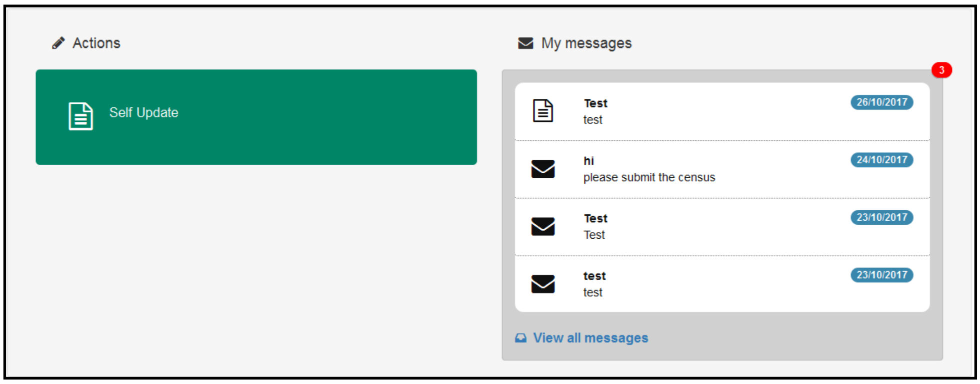
More Information: *Early Years Census Return* reference guide available on the One Publications website.

The provider can update the following census details using the Self Update portal:

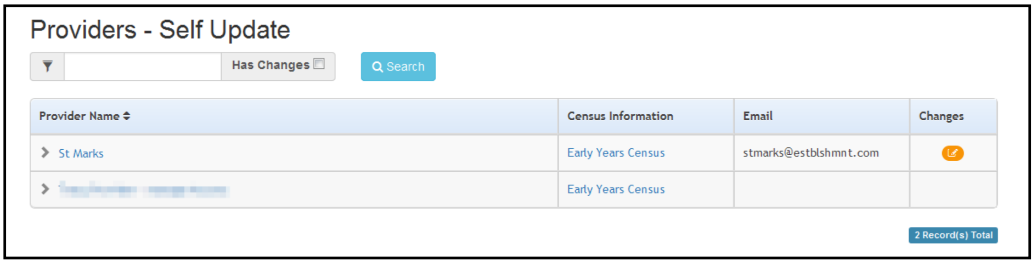
- Availability and opening hours.
- Staff summary details - the number of staff with particular qualifications.
- Summary of children in funded places for each age group.

The provider can save their changes and continue to update the information until they are ready to submit it.

1. Select the **Self Update** tile on the Welcome page to display the available **Actions** and any messages that have been sent from the Local Authority to the provider.

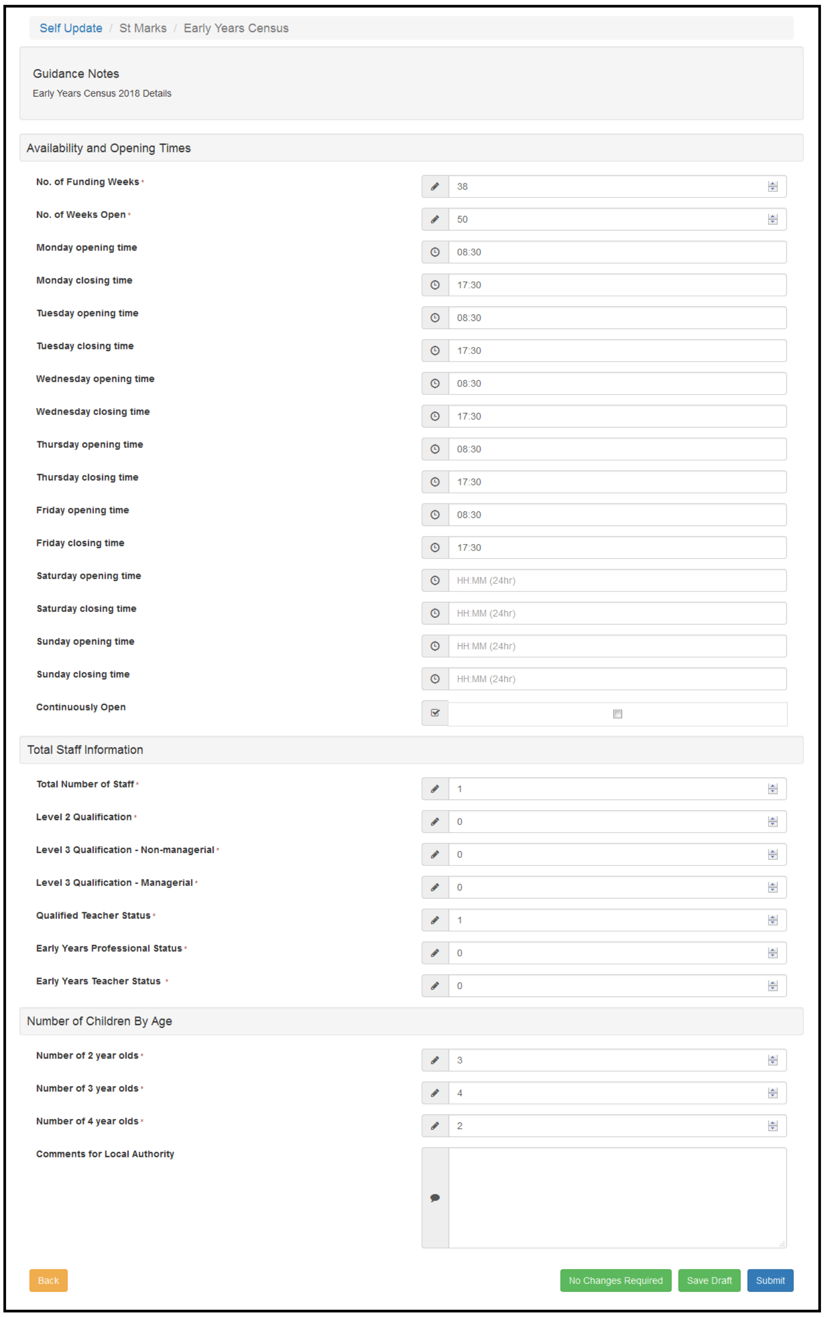


2. Select the **Self Update** action to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see Managing User Accounts on page *8*.



3. If required, enter one or more characters into the search and click the **Search** button.
4. Click the **Early Years Census** link to display the current census details held for the provider.

NOTE: *The link is only displayed if the Local Authority has pre-populated the census, the provider has the* ***Registered for Nursery Education Grant/Fund*** *check box selected for at least one service in the v4 Client and the* ***Show Early Years Census*** *configuration value is set to* ***On*** *via the* ***Self Update - General Configuration*** *page.*



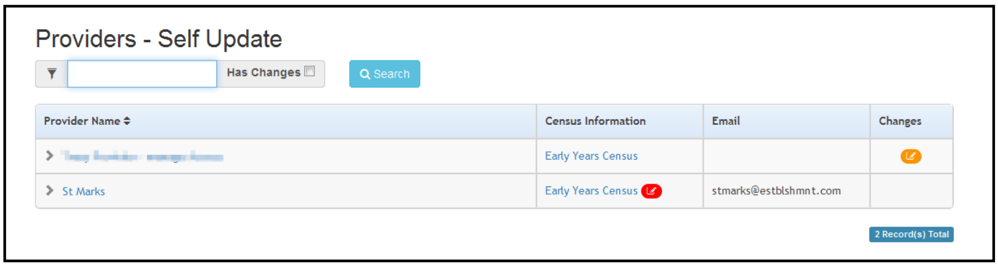
5. If required, update the census details.

   Alternatively, if no changes are required:

   a. Click the **No Changes Required** button.

   b. Click the **Yes** button to confirm.

6. To save the changes without submitting them, click the **Save Draft** button to display the **Providers - Self Update** page with an icon in the **Census Information** column to indicate that the census has been updated but not submitted, as shown in the following graphic:



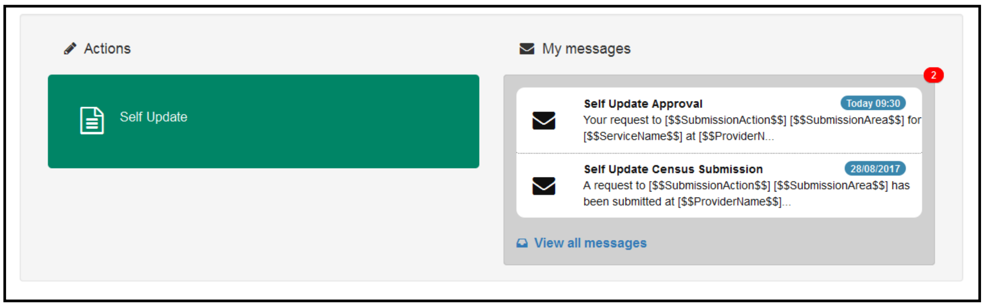
To view the changes and make further updates, click the **Early Years Census** link.

7. To submit the changes, click the **Submit** button to display a verification message.
8. Click the **Yes** button to confirm.

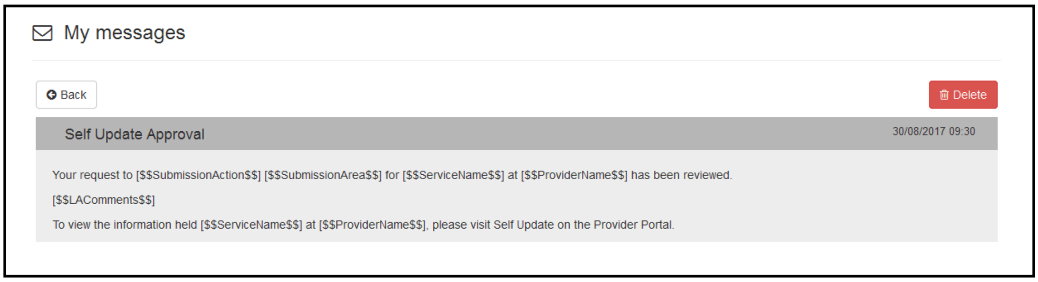
> ***NOTES:*** *If the provider selects (ticks) the* ***Continuously Open*** *check box, any opening and closing times entered are cleared and the fields are disabled.*
>
> *When the provider clicks the* ***Yes*** *button to confirm the changes, if the configuration value for* ***Review Early Years Census Submissions*** *is set to* ***On****, the pending changes icon is displayed on the* ***Providers - Self Update*** *page and the Local Authority needs to approve the changes. If the configuration value is set to* ***Off****, the changes are immediately saved in the database.*
>
> *The provider can make changes to the census details after submitting them as long as the census window is still open (****Show Early Years Census*** *configuration value is set to* ***On****).*
>
> *For more information, see Configuring the Self Update Portal on page 18.*

Viewing Sent Messages

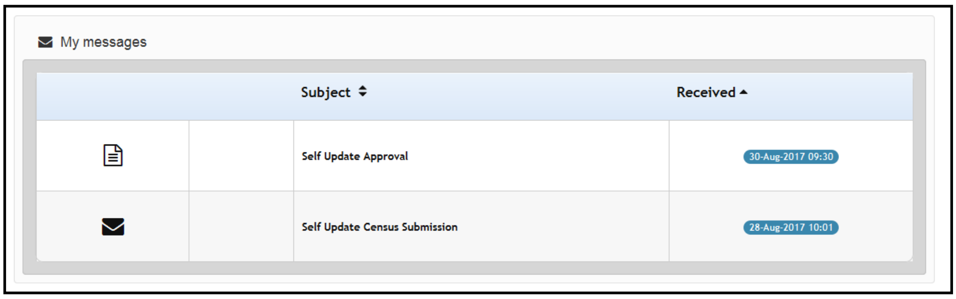
When the provider clicks the **Self Update** tile on the Welcome page, any messages sent to them are displayed in the **My Messages** panel.



To view the details, select a message to display the **My Messages** page.



Alternatively, to view a list of messages, click the **View all messages** link.



If required, click a heading to sort the list.

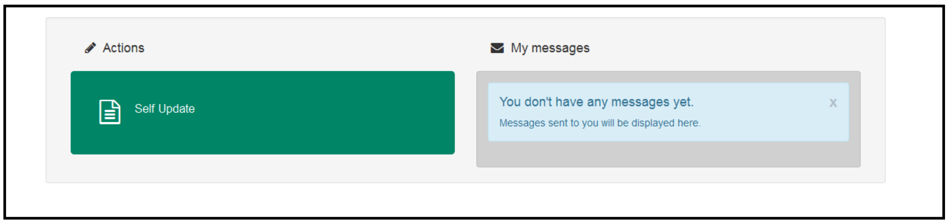
Viewing Service Details

Providers can use the Self Update portal to view the details held about their services. The Local Authority can use the Self Update Configuration page to determine which information is displayed. For more information, see Configuring the Self Update Portal on page *18*.

Viewing Providers and Services

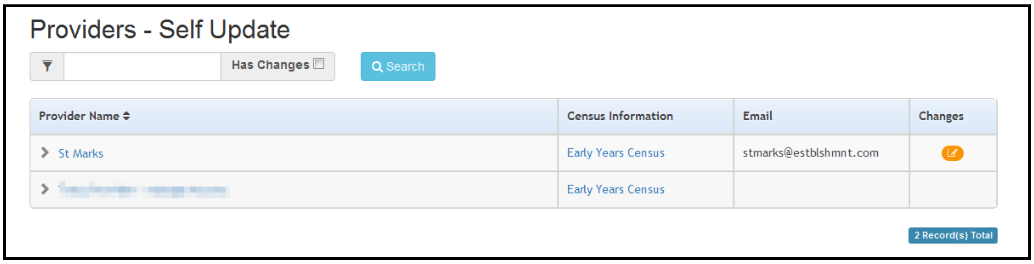
To view the details currently held about your services:

1. Select the **Self Update** tile on the Welcome page to display the available **Actions** and any messages that have been sent.



2. Select the **Self Update** tile to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see Managing User Accounts on page *8*.

> ***NOTE:** If you only have access to one provider, the **Services - Self Update** page is displayed with a list of services at that provider.*



3. If required, enter one or more characters into the search and click the **Search** button to filter the list.
4. Click the link for the required provider to display the **Services - Self Update** page with a list of services for this provider.

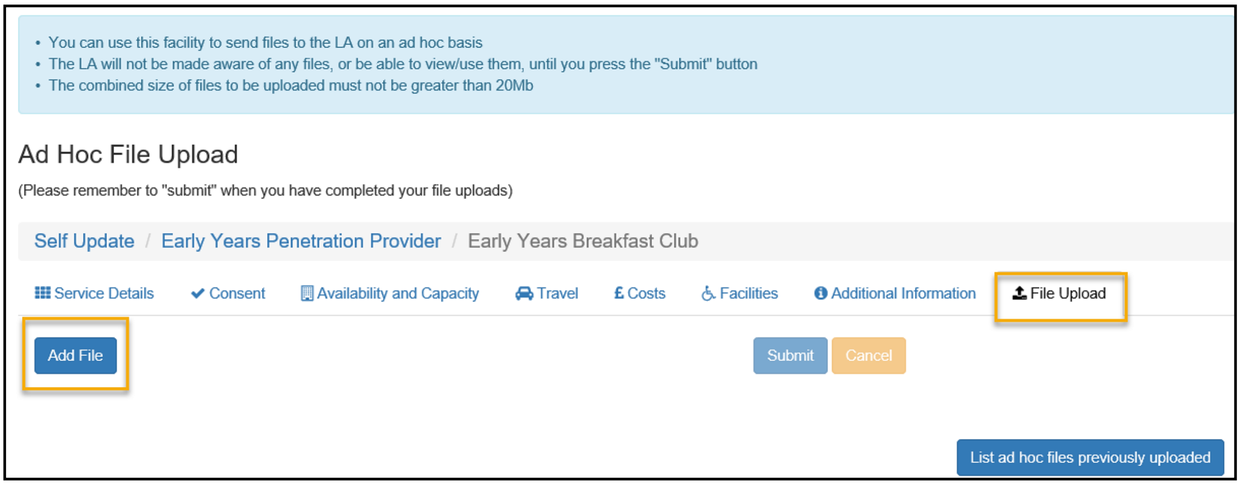
***NOTE:** If the required service is not listed, it can be added by clicking the **Add Service** button. For more information, see Adding a Service on page* 80.

File Upload to Local Authority

Providers can upload and manage files(s) for their services in accordance with the configuration settings by their local authority.

The file(s) are uploaded as follow:

1. On the Provider Self update screen, select the relevant Service to load the Service Details screen.
2. Select the File Upload tab, to launch the Ad Hoc File Upload screen as shown in graphic below.

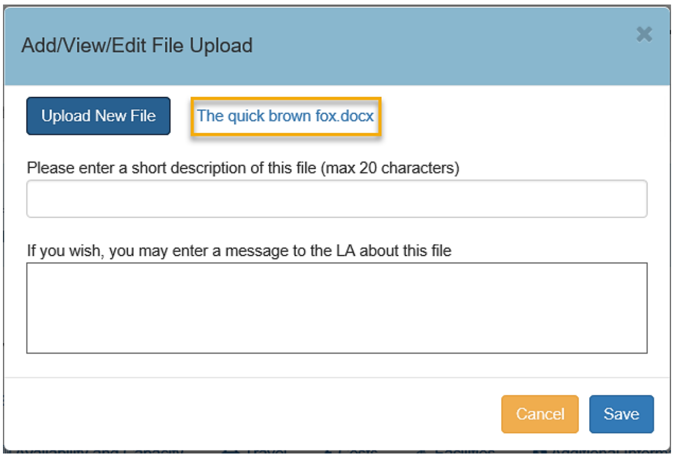


A notification is displayed at the top of the screen to the Providers which states as follow:

- You can use this facility to send files to the LA on an ad hoc basis
- The LA will not be made aware of any files, or be able to view/use them, until you press the 'Submit' button
- The combined size of files to be uploaded must not be greater than 20Mb

The Provider can send the Ad hoc files as follow:

1. Select the **Add File** button to open the **Add/View/Edit File Upload** screen

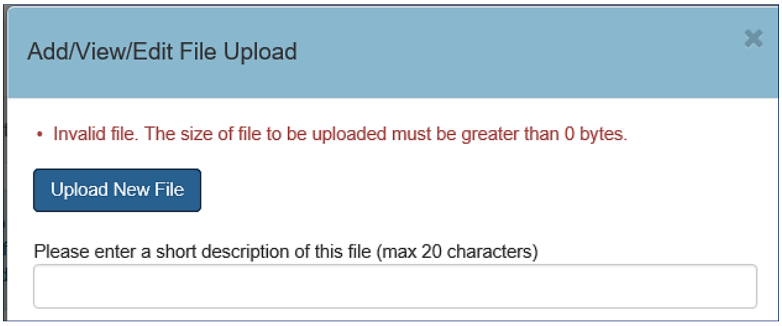


2. The Upload New File button allows the Provider to select the designated File to Upload.

Note: *The file size must be more than **0 bytes** and less than **20Mb.***

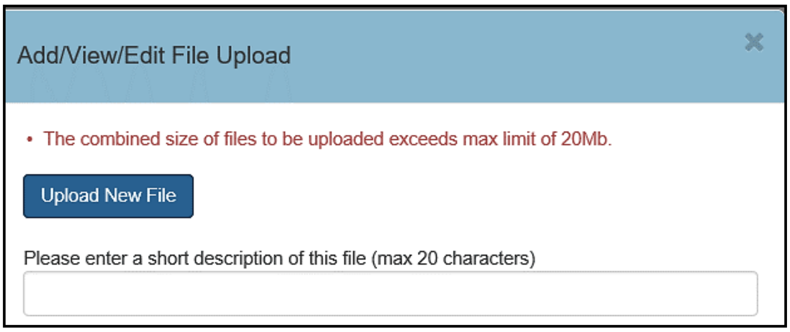
The message displayed below, will appear if the file size is 0 bytes.

'Invalid file. The size of file to be uploaded must be greater than 0 bytes. '



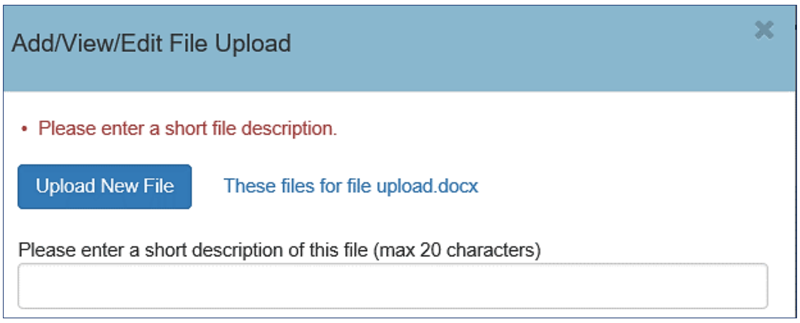
If the file is 20Mb the following message will appear.

'The combined size of files to be uploaded exceeds max limit of 20Mb.'

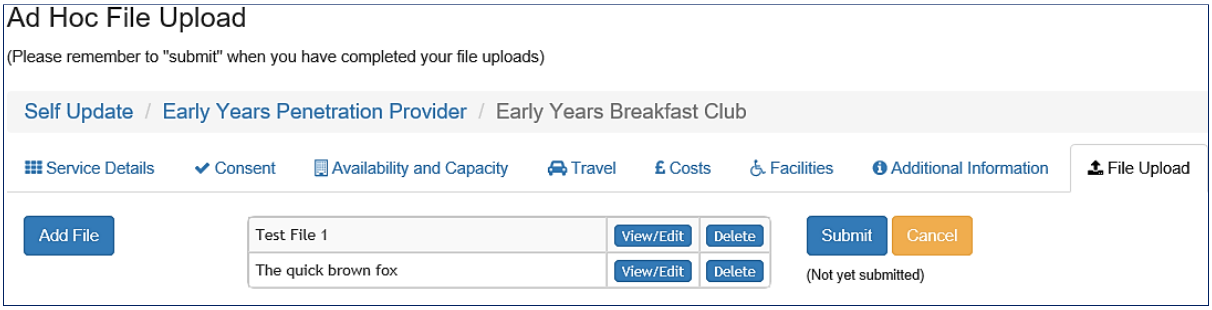


3. A Description of the file to be sent must be entered. If this is left blank the following message will appear.

   'Please enter a short file description'

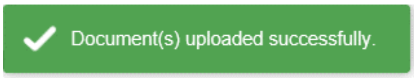


4. After Save is selected the screen will return to the Ad Hoc File Upload screen, where it will display the file(s) selected to Upload.



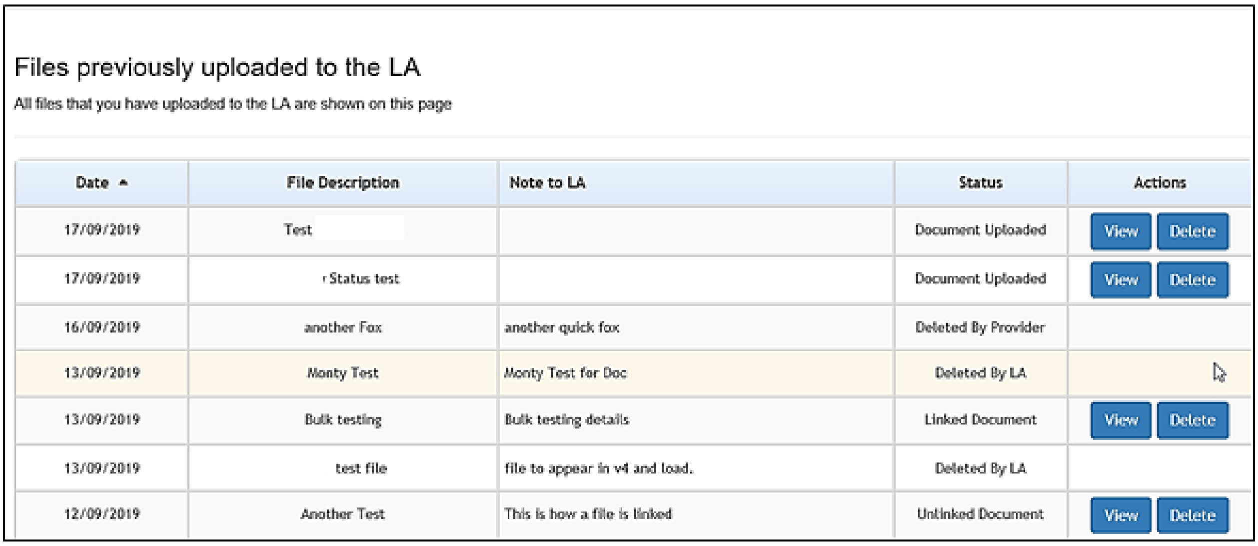
5. The file(s) can be **View/Edit** before being Submitted. The Delete and Cancel button will remove the selected file for uploading.

6. Click the **Submit** button to Upload the file. A confirmation message will be displayed as shown below.



Managing Uploaded Files

The Provider can view /manage Uploaded file by selecting ***List ad hoc files previously uploaded*** button, located in the bottom right hand corner of the **Ad Hoc File Upload** screen. This will launch the ***Files previously uploaded to the LA*** screen shown in graphic below.



Files previously uploaded to the LA

All files that you have uploaded to the LA are shown on this page

Date	File Description	Note to LA	Status	Actions
17/09/2019	Test		Document Uploaded	View Delete
17/09/2019	Status test		Document Uploaded	View Delete
16/09/2019	another Fox	another quick fox	Deleted By Provider	
13/09/2019	Monty Test	Monty Test for Doc	Deleted By LA	
13/09/2019	Bulk testing	Bulk testing details	Linked Document	View Delete
13/09/2019	test file	file to appear in v4 and load.	Deleted By LA	
12/09/2019	Another Test	This is how a file is linked	Unlinked Document	View Delete

The ***Files previously uploaded to the LA*** screen provides the following information and Actions that can be taken with the Uploaded files.

Date: Date the Uploaded file was sent to LA

File Description: Description of the file sent

Note to LA: The message that was sent to the LA with the uploaded file

Status: This shows the latest status of the file.

(Note: This is the same Status stages as shown on LA screen)

Actions:

View: The Provider can view the file that was uploaded

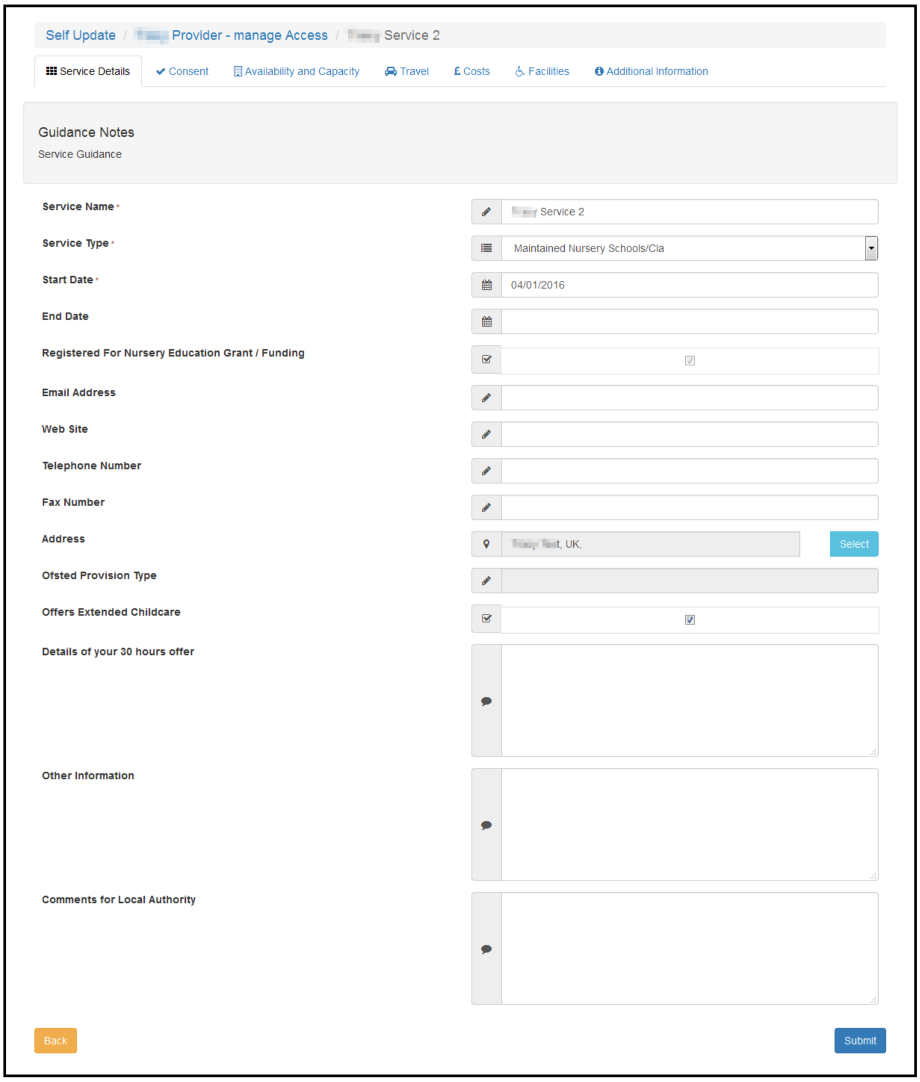
Delete : The Provider can delete the file that was uploaded.

Viewing Service and Consent Details

> ***NOTE:*** *The **Consent** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see* *Configuring the Self Update Portal on page 18.*

To view service and consent details for a provider:

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*
2. Click the link for the required service to display the **Service Details** tab.



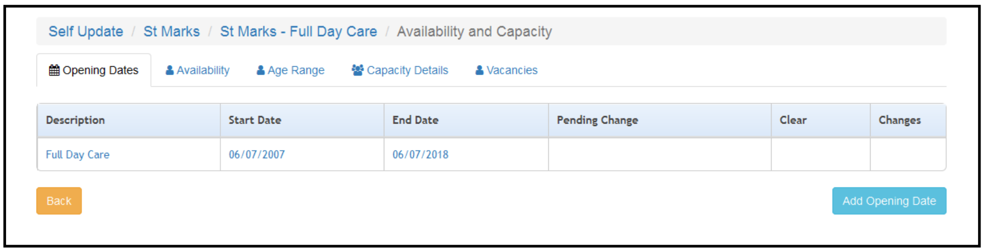
3. If required, select the **Consent** tab to display the consent to share information about the service.

Viewing Availability and Capacity

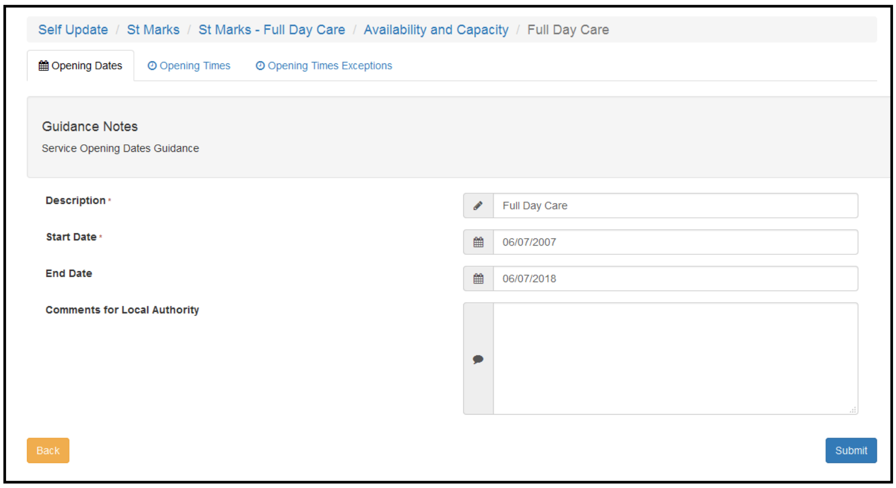
> ***NOTE:*** *The **Availability and Capacity** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see* *Configuring the Self Update Portal on page 18.*

To view the current availability and capacity details held for the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see Viewing Service and Consent Details on page 55

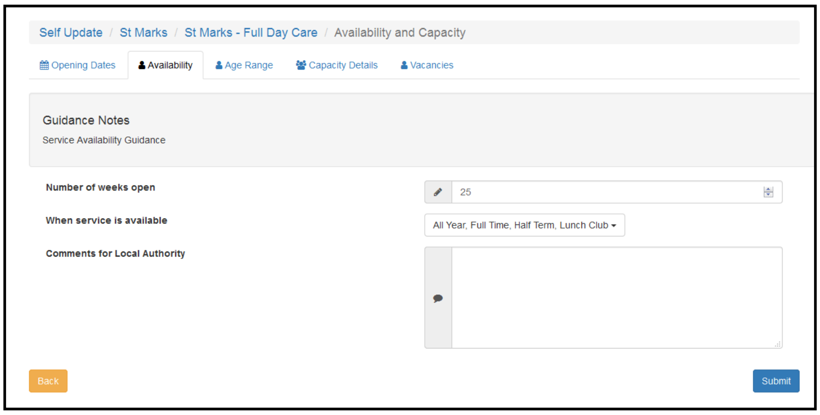


2. To view opening dates, click the link for the required record to display the **Opening Dates**, **Opening Times** and **Opening Times Exceptions**.

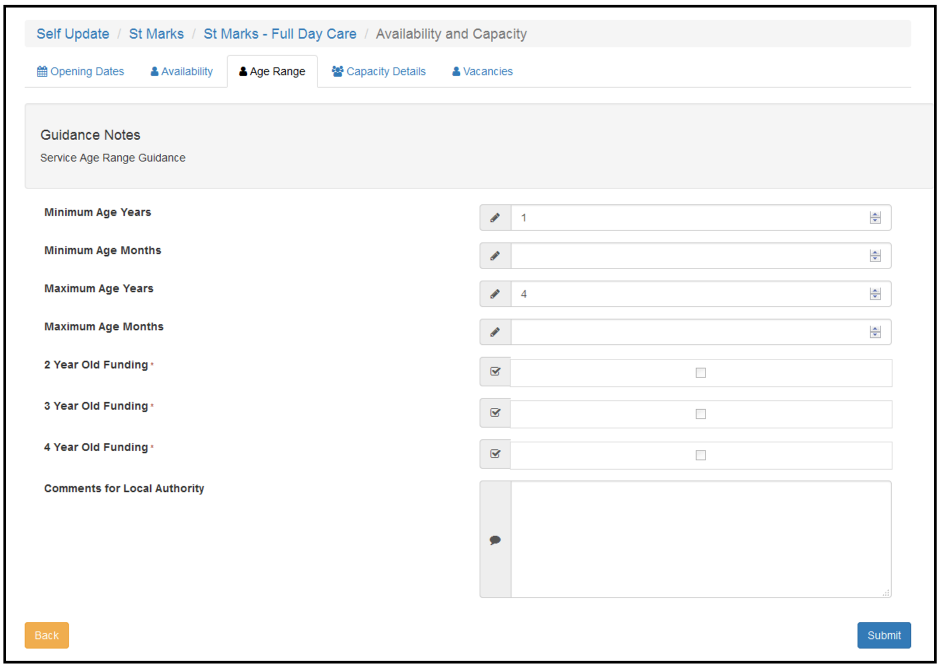


For more information, see Viewing Opening Dates, Times and Exceptions on page *58*.

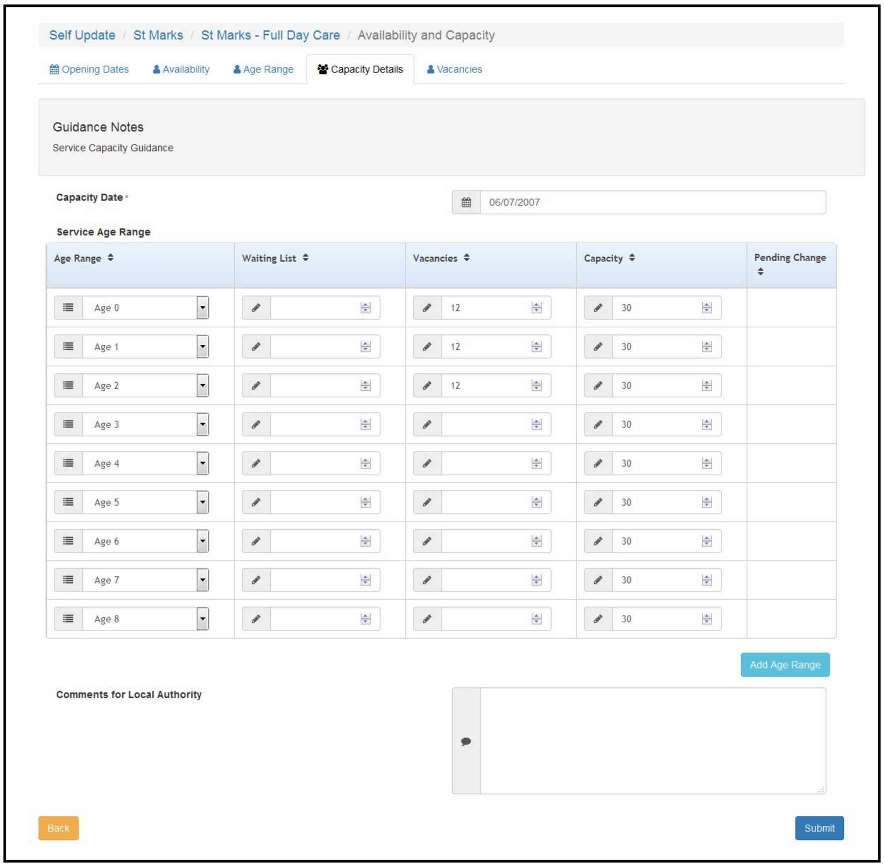
3. To view the information held about the number of weeks and when the service is available, select the **Availability** tab.



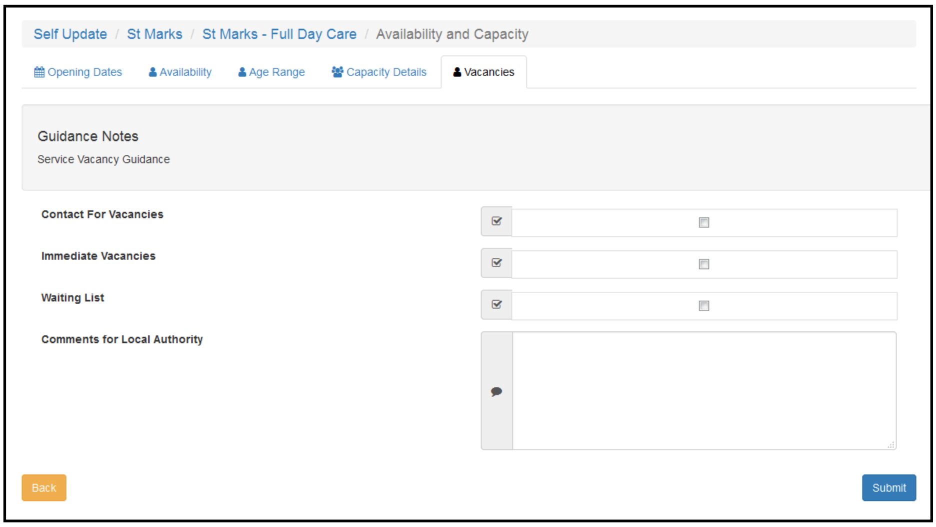
4. To view details about the minimum and maximum ages and funding status for each age group at the service, select the **Age Range** tab.



5. To view numbers on the waiting list, vacancies and capacity for each age range at the service, select the **Capacity Details** tab.



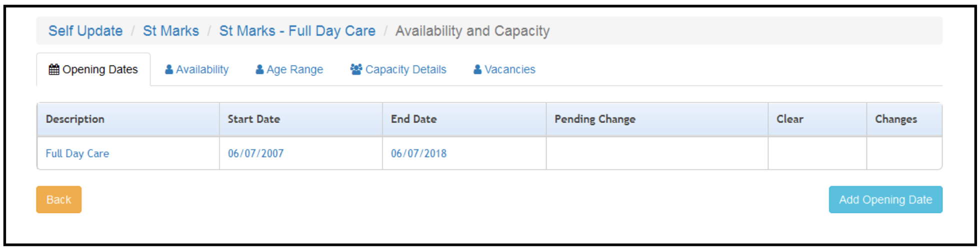
6. To view the information currently held about whether the service can be contacted for vacancy details, whether there are immediate vacancies and whether there is a waiting list at the service, select the **Vacancies** tab.



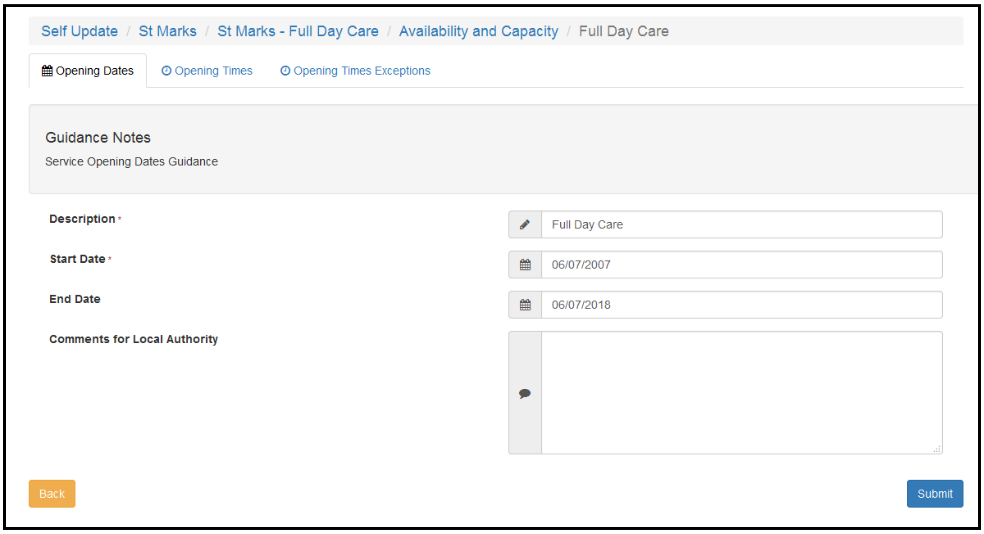
Viewing Opening Dates, Times and Exceptions

To view the information currently held regarding dates and times that the service is open:

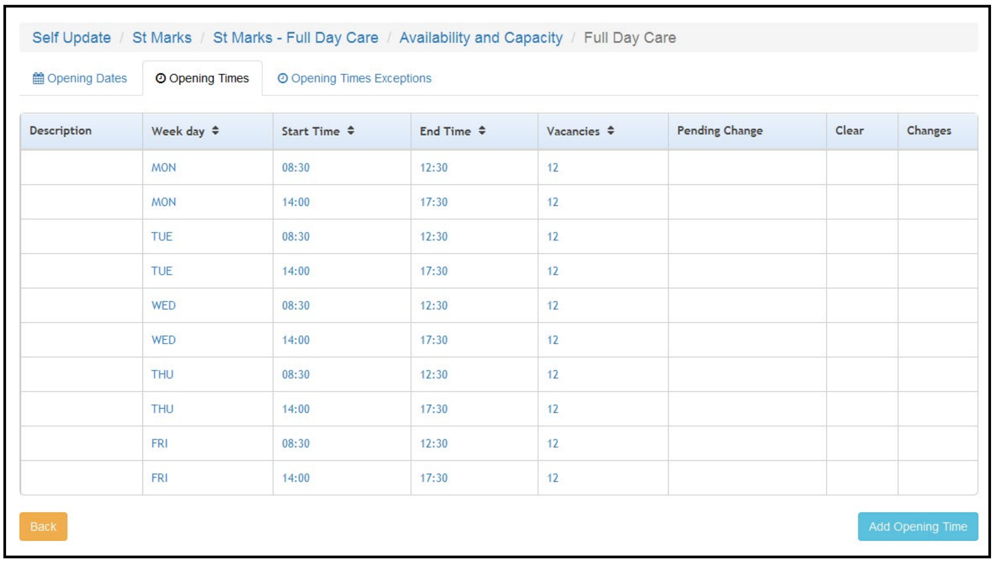
1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see Viewing Service and Consent Details on page 55



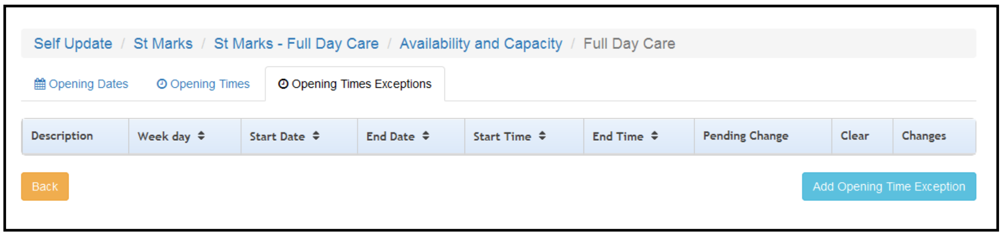
2. Click the required **Description** link to display the **Opening Dates** tab.



3. To view opening times, select the **Opening Times** tab.



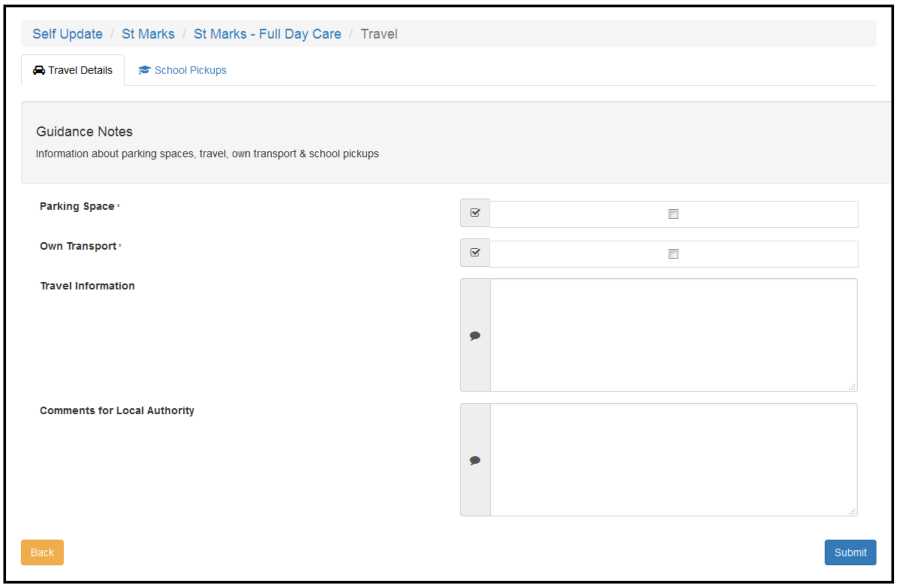
4. To view exceptions to opening times, select the **Opening Times Exceptions** tab.



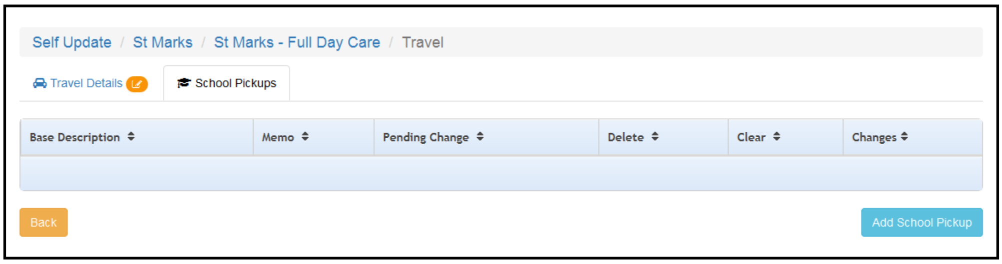
Viewing Travel, Costs and Facilities

***NOTE:** The **Travel, Costs and Facilities** tabs are only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see Configuring the Self Update Portal on page 18.*

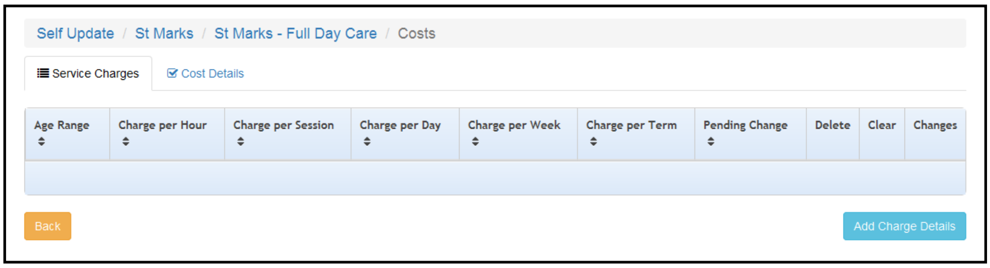
1. View the basic details for the service. For more information, see Viewing Service and Consent Details on page 55
2. To view details about parking, own transport and travel information, select the **Travel** tab and ensure that the **Travel Details** sub tab is selected.



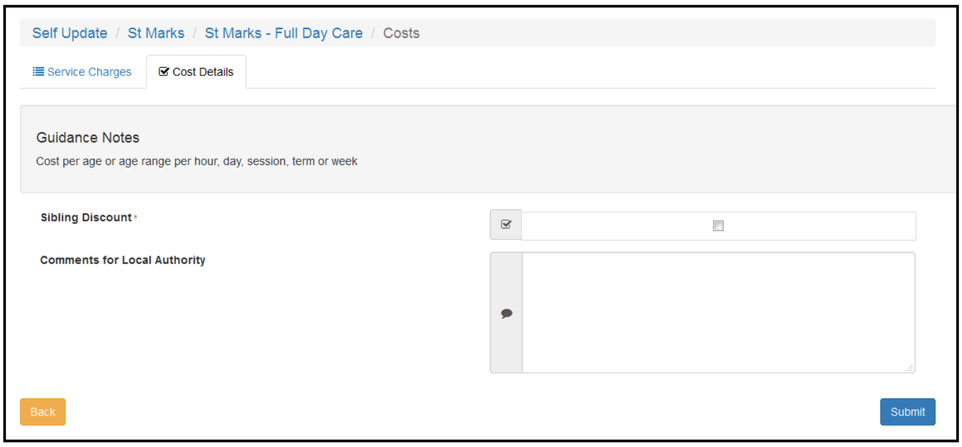
3. To view information about school pickups, select the **School Pickups** sub tab.



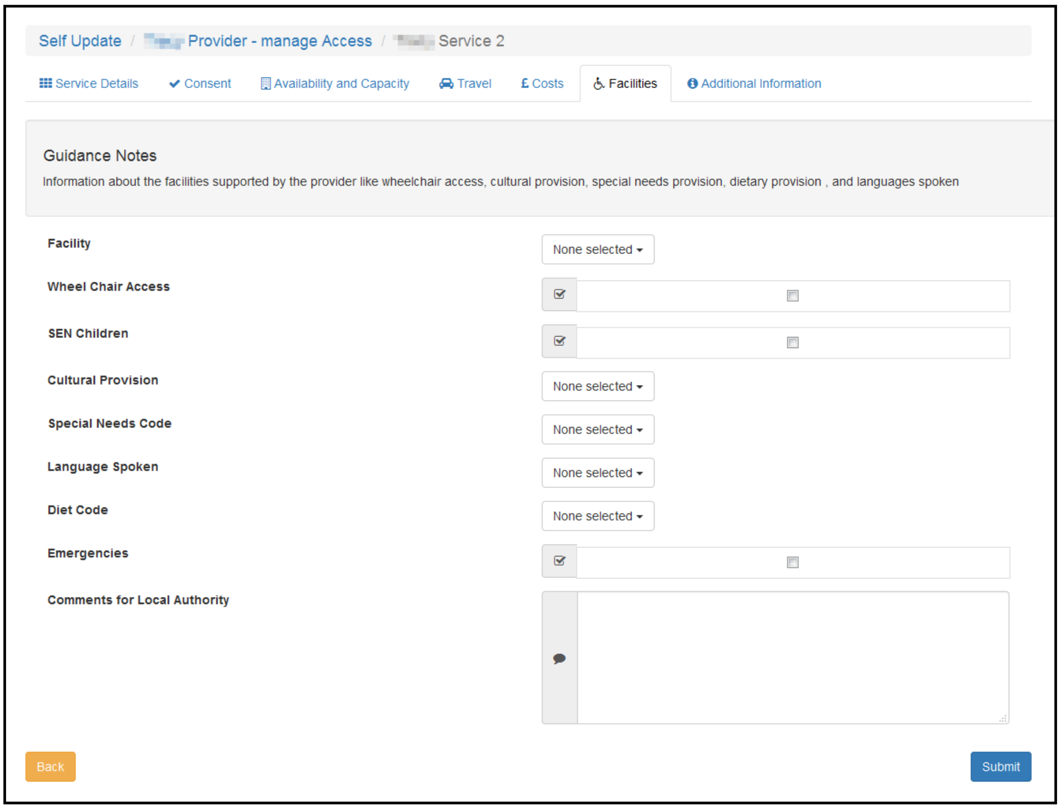
4. To view details of service charges, select the **Costs** tab and ensure that the **Service Charges** sub tab is selected.



5. To view details of costs and **Sibling Discount**:
   a. Select the **Costs** tab.
   b. Select the **Cost Details** sub tab.



6. To view details of the facilities supported by the provider, select the **Facilities** tab.

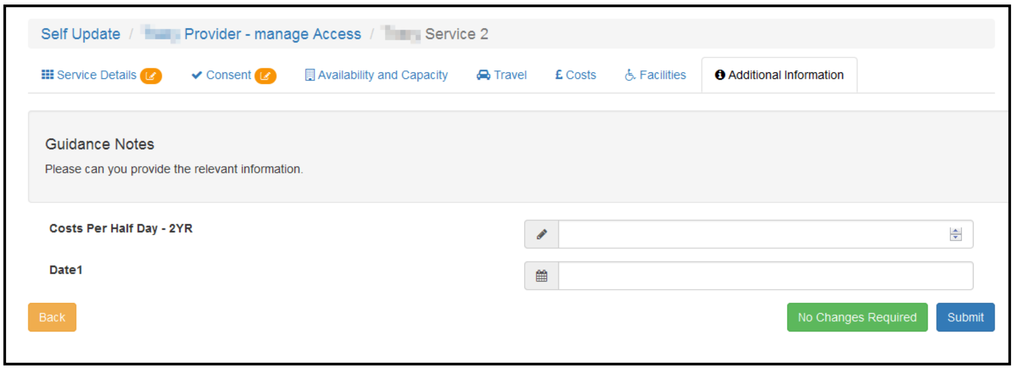


Viewing Additional Information

> ***NOTE:*** *The* ***Additional Information*** *tab is only displayed if the Local Authority has set the* ***Configuration Value*** *to* ***ON*** *via the* ***Configuration*** *page. The Local Authority configures the Self Update portal to determine which of the additional information to display to providers. For more information, see Configuring the Self Update Portal on page 18.*

To view additional information for a provider:

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Additional Information** tab to display any additional information defined for the service.



Updating Service Details

Introduction

The provider can use the Self Update portal to make changes to the details that are currently held about their services. After making the required changes, they submit them for approval by the Local Authority.

The Local Authority administrator uses the **Self Update - General Configuration** page to determine which information can be updated. For more information, see Configuring the Self Update Portal on page *18*.

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the specified email address whenever a provider submits a change. The Self Update portal sends the email using the details in **The self update email address** option as the **From** address. For more information, see Configuring the Self Update Portal on page *18*.

The email contains the following information:

A request to [*Create/Update/Delete*] [*Submission area e.g. Service Details*] has been submitted to [*Service name*] at [*Provider name*].

[*Comments for Local Authority*]

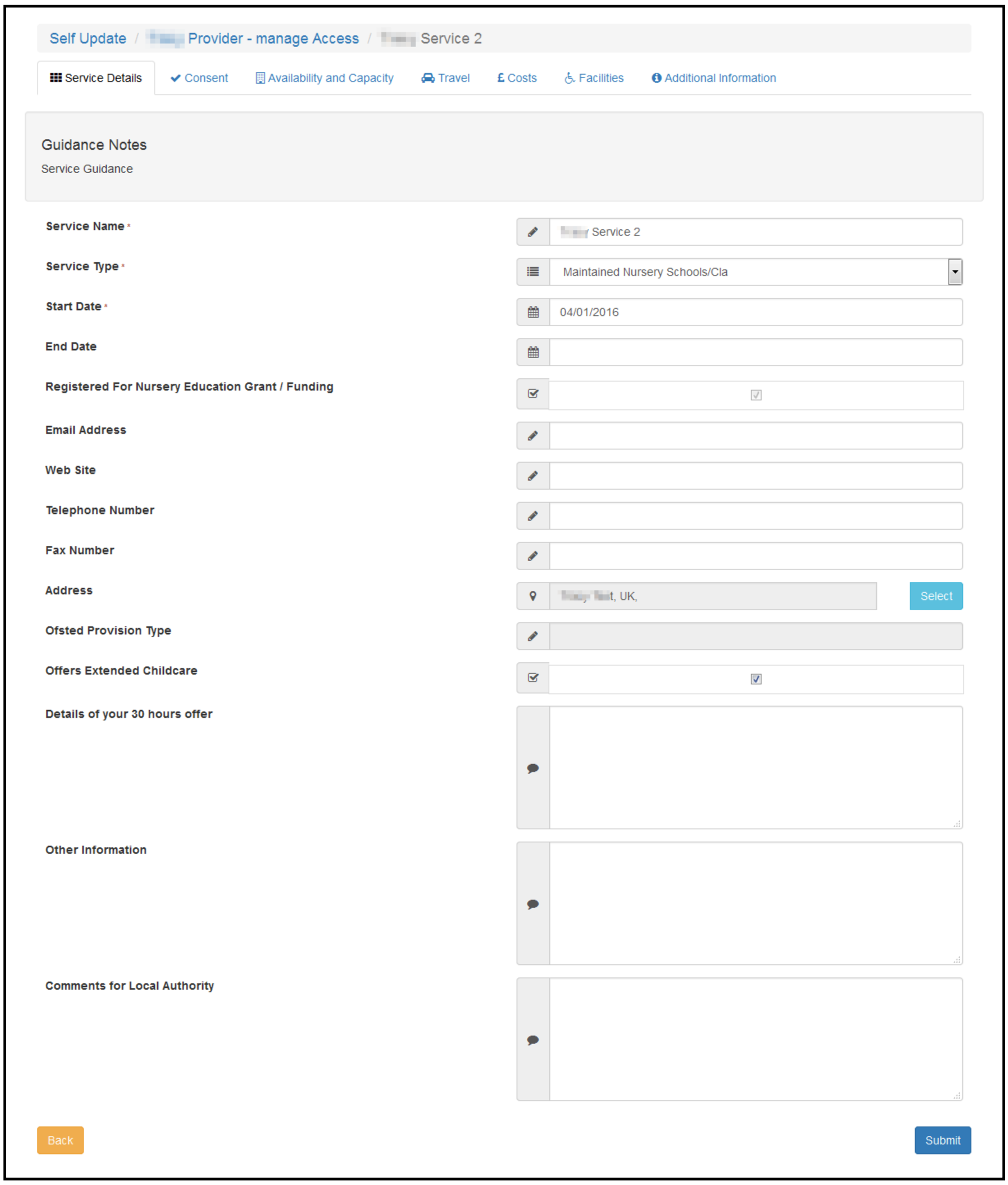
Services can be accessed through Self Update.

NOTE: *The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the* ***Self Update On Submit Email Template*** *page via* ***Provider Portal | Administration | Site Setup | Message Templates****. For more information, see* *Message Templates on page 7.*

Updating Service Basic Details

To make changes to the service details currently held by the Local Authority:

1. View the service details. For more information, see Viewing Service and Consent Details on page 55



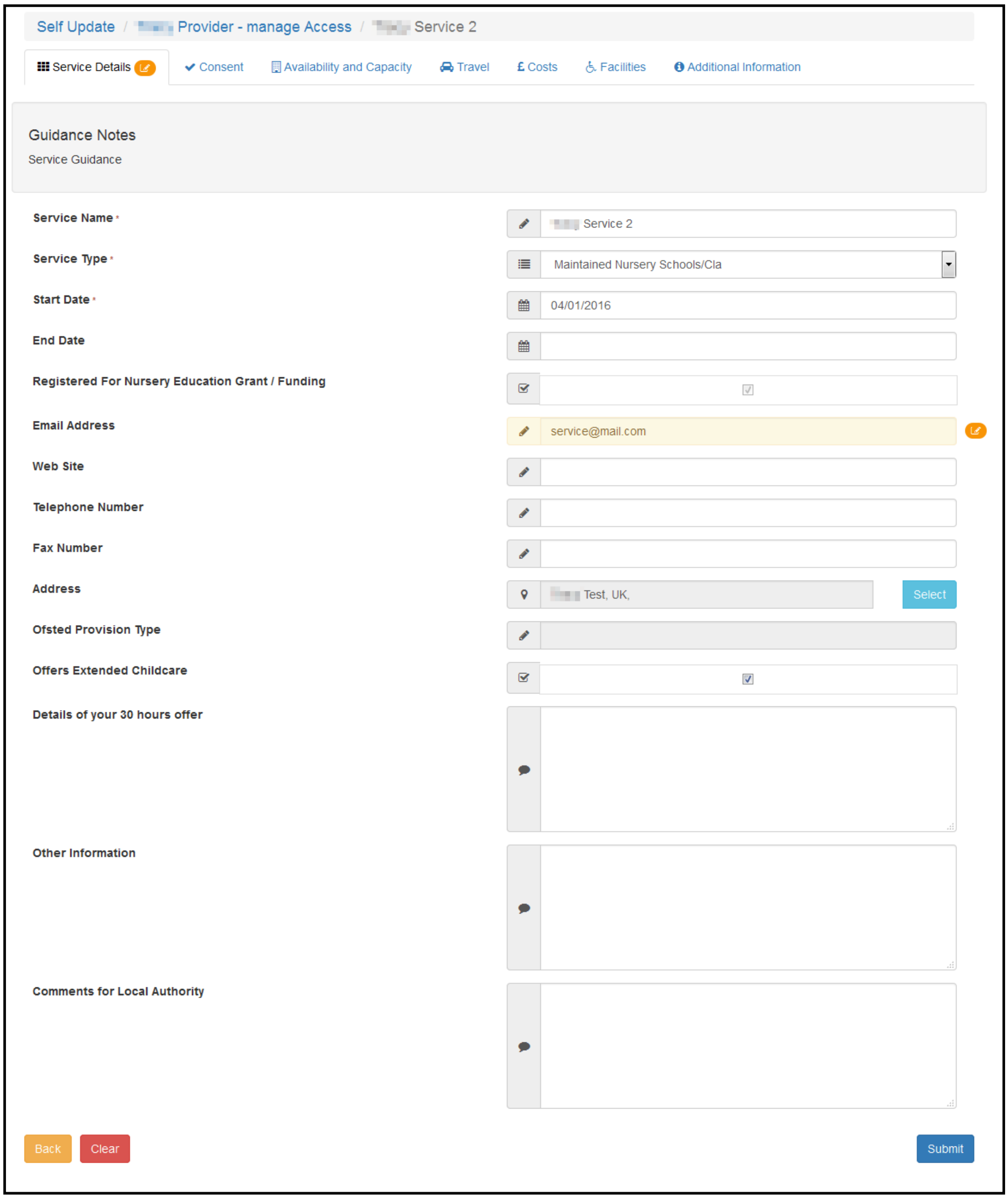
2. Make one or more changes to the **Service Details**:
   a. Enter a **Service Name**, **Start Date** or **End Date**.
   b. Select a **Service Type** (*Table ID: 0423*).
   c. Enter one or more of the following contact information:
      - **Email Address**
      - **Web Site** address
      - **Telephone Number**
      - **Fax Number**.
   d. Click the **Select** button to open the **Address Search** and select an address or add a new address. For more information, see Selecting an Address on page *65*.
   e. Select or deselect the **Offers Extended Childcare** check box.

> ***NOTE:*** *If extended hours are already recorded for the current term and this check box is deselected, when the change is approved it will only affect future terms with no extended hours recorded.*
>
> *If no extended hours have been recorded against any funded service in Current term (e.g. Autumn 2018), then the Local Authority / Provider should be able to select Autumn as the term extended hours ceases from.*

f. Enter **Details of your 30 hours offer**, **Other Information** and **Comments for Local Authority**.

> ***NOTE:*** *Information recorded in **Details of your 30 hours offer** is exported to FID. The Local Authority can choose to display the information to parents on the FID website.*

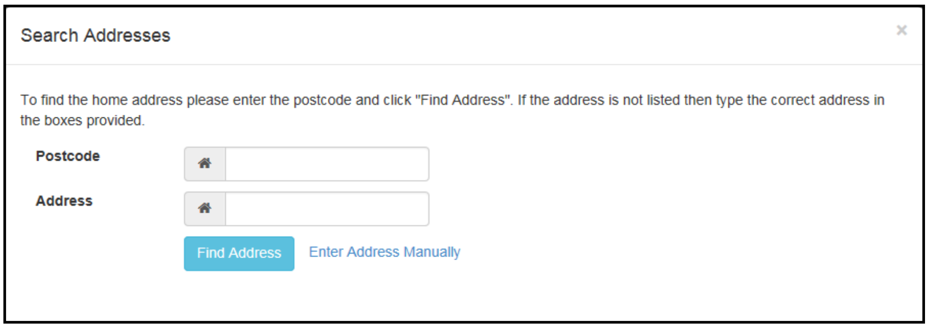
3. Click the **Submit** button.



The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing Submitted Changes on page *82*.

Selecting an Address

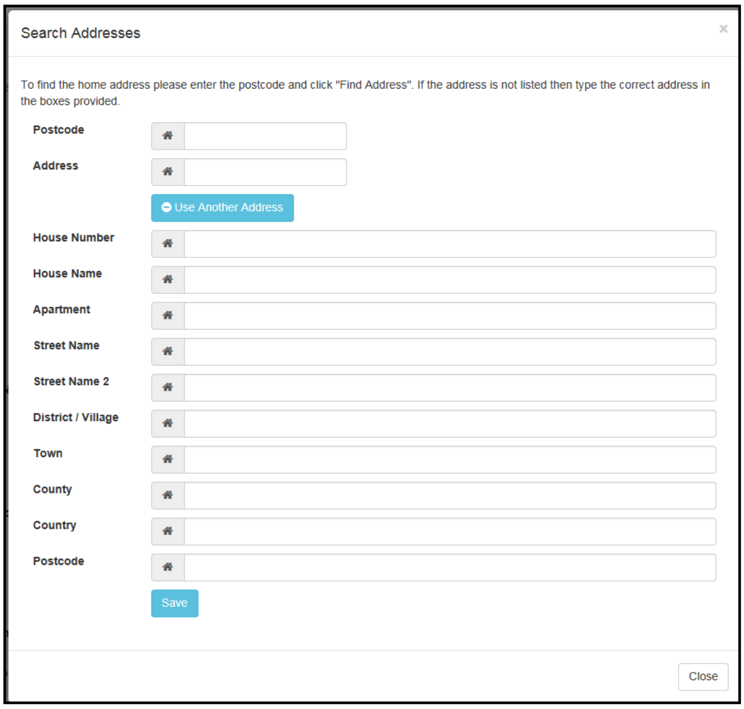
1. Click the **Select** button to display the **Search Addresses** dialog.



2. To find an existing address:
   a. Enter 2 or more characters of the **Postcode** and click the **Find Address** button to list matching addresses.
   b. Select the required address.

   Alternatively, if the required address is not listed:

   a. Click the **Enter Address Manually** button to display the blank address fields.



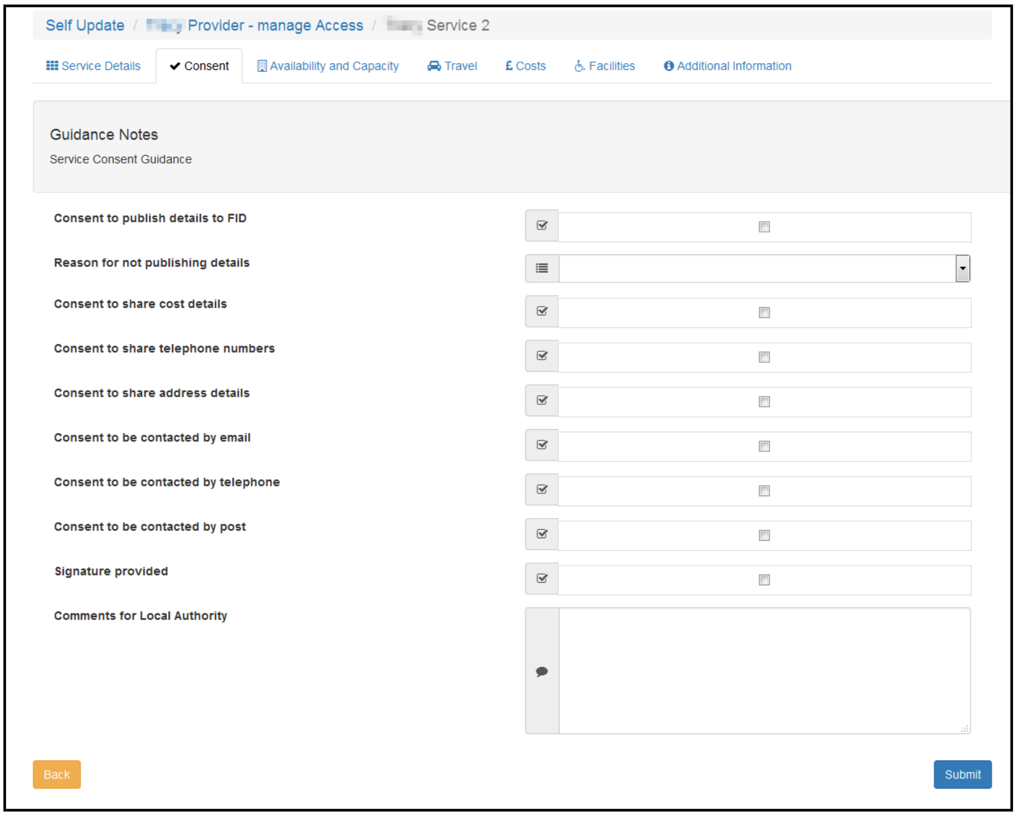
   b. Enter the address.
   c. Click the **Save** button.

      The new address is highlighted on the **Service Details** tab.

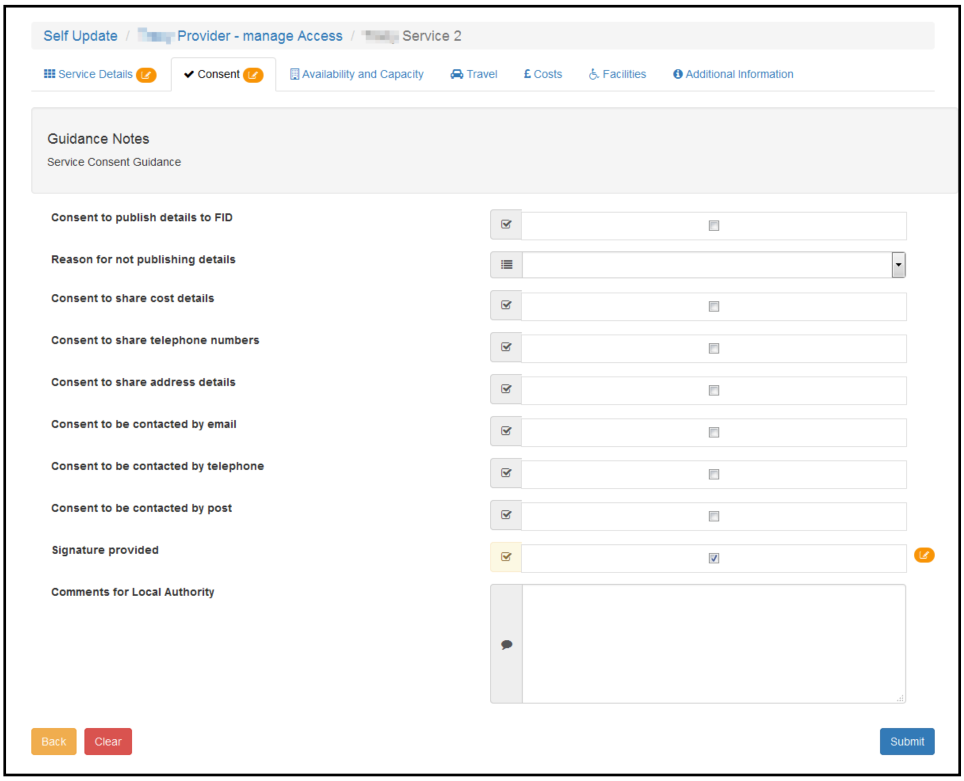
Updating Consent Details

The provider can update the details that control the consent to share information about the service by selecting or deselecting the check boxes. They can also add comments.

1. View the service details and select the **Consent** tab to display the details currently held for the service. For more information, see Viewing Service and Consent Details on page 55



2. To change the consent details:
   a. Select or deselect one or more of the check boxes.
   b. If required, select a **Reason for not publishing details** from the drop-down list (*Table ID: 1116*).
   c. If required, enter **Comments for Local Authority**.
3. Click the **Submit** button.



The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing Submitted Changes on page *82*.

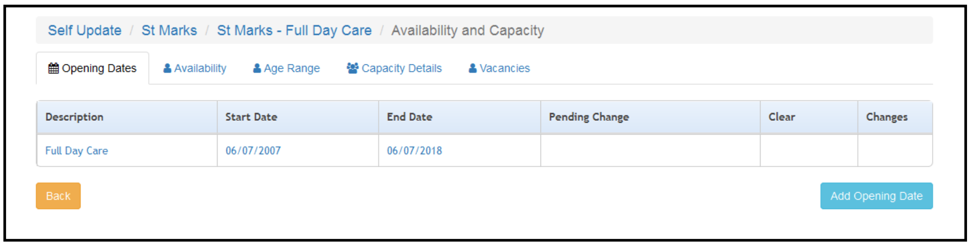
Updating Availability and Capacity Details

Information about when the service is available, the age ranges accepted, capacity, vacancies and waiting list can be updated by the provider.

When changes are submitted, if email feedback is enabled on the **Self Update General Configuration** page, an email will be sent to the email address specified. For more information, see Configuring the Self Update Portal on page *18*.

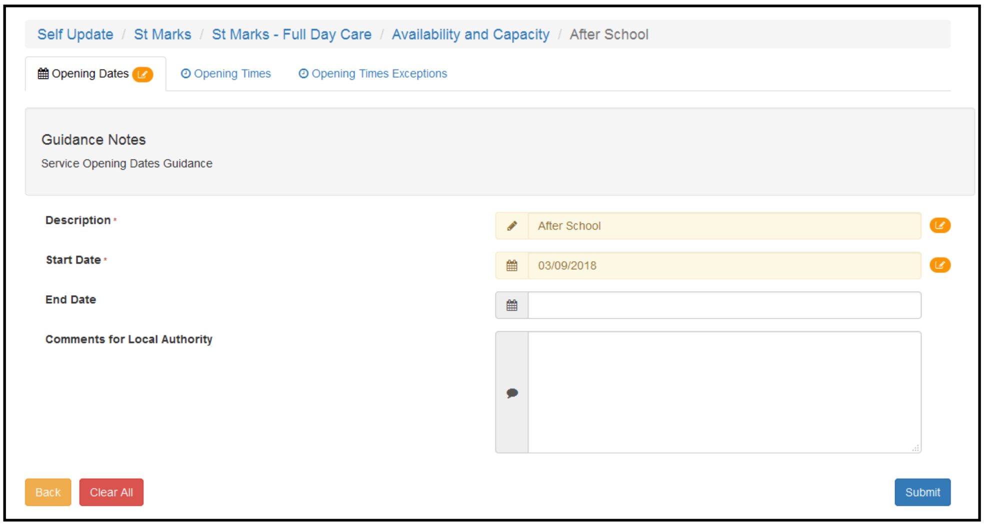
Adding a New Opening Date

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see 55 page .



2. To add a new opening date:
   a. Click the **Add Opening Date** button to display the **Opening Dates** tab.
   b. Enter a **Description** and a **Start Date**.
   c. If required, enter an **End Date**.
   d. If required, enter **Comments for Local Authority**.

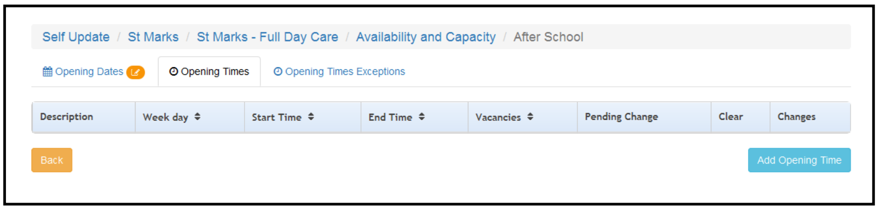
e. Click the **Submit** button.



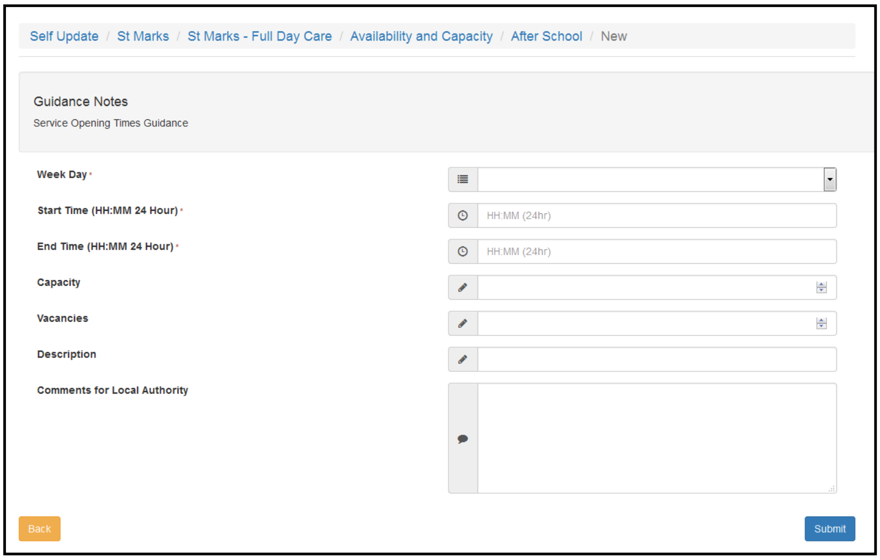
The **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear All** button is displayed to enable the submitted changes for this item and all associated records to be cleared. For more information, see Clearing All Related Changes on page *83*.

3. To add new opening times for the opening date:

a. Select the **Opening Times** tab.

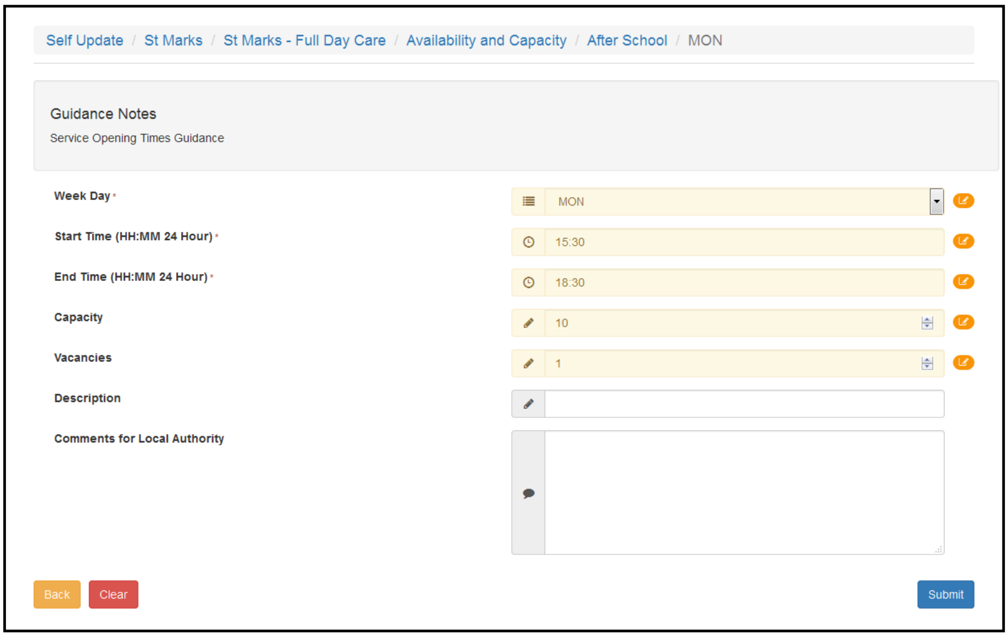


b. Click the **Add Opening Times** button to display the **New** opening times page.

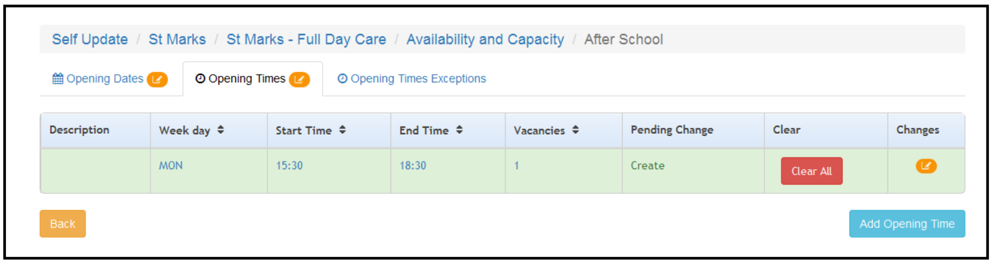


c. Enter the opening times for this opening date.

d. Click the **Submit** button.

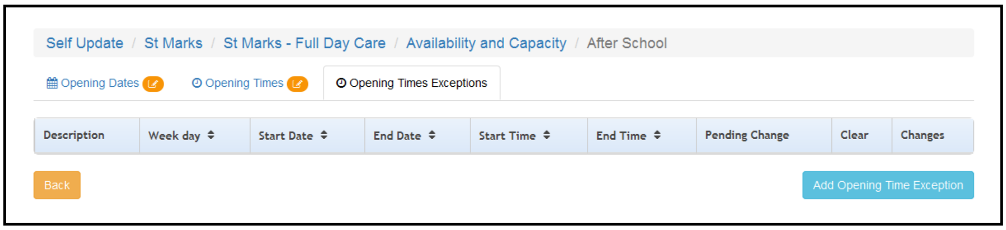


The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing Submitted Changes on page *82*.

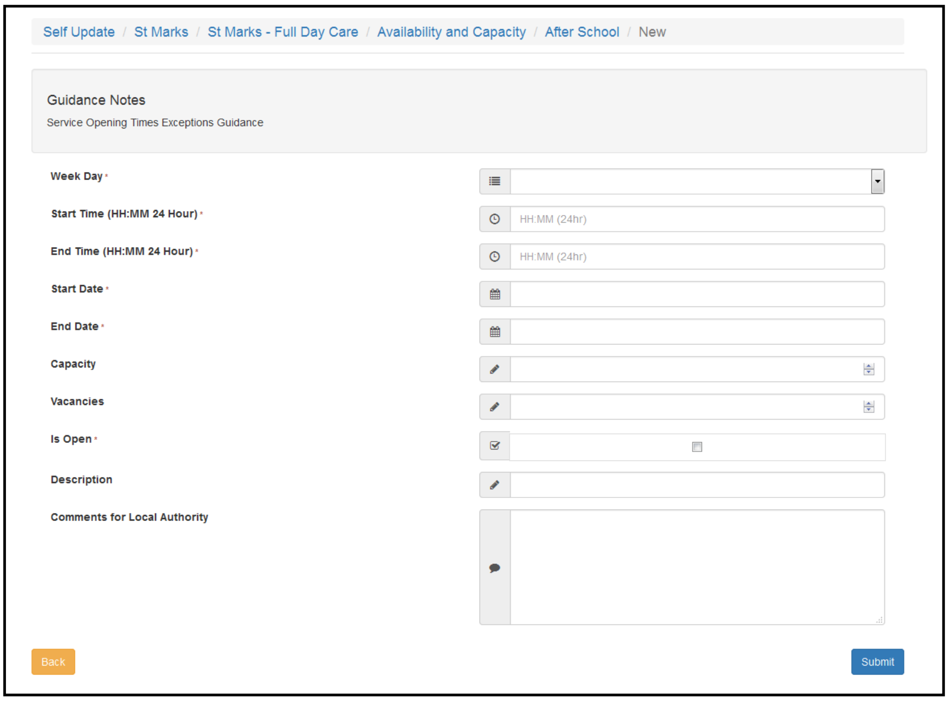


4. If required, add exceptions to the opening times for this opening date:

   a. Select the **Opening Times Exceptions** tab.

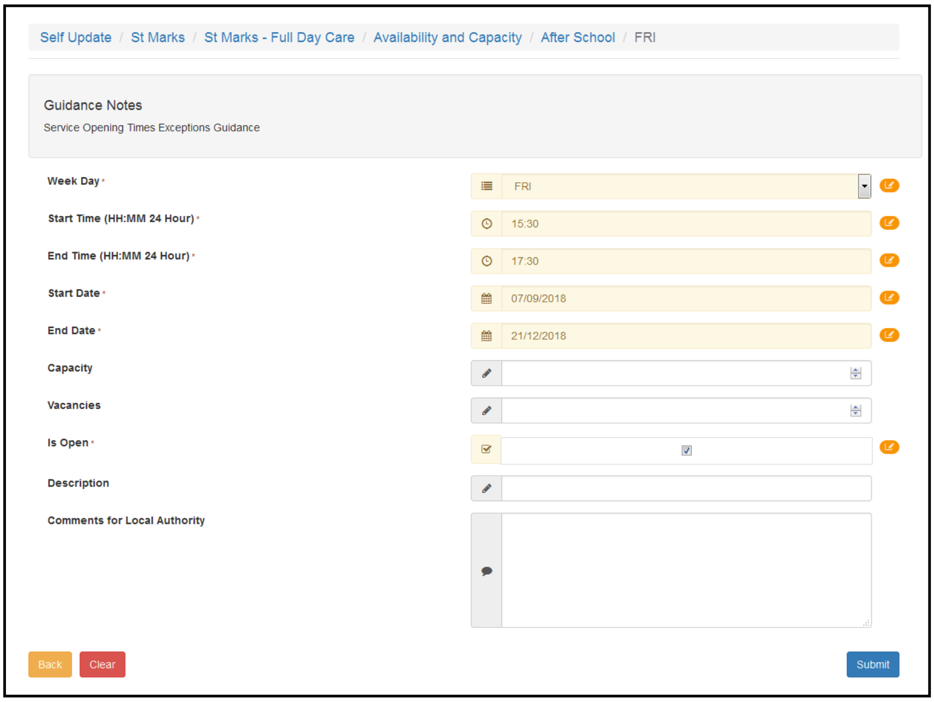


   b. Click the **Add Opening Times Exception** button to display the **New** opening times exceptions page.



c. Enter the opening times exceptions for this opening date.

d. Click the **Submit** button.

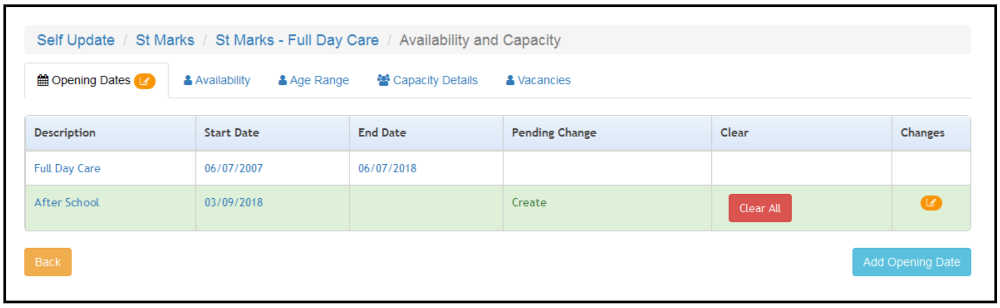


The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing Submitted Changes on page *82*.

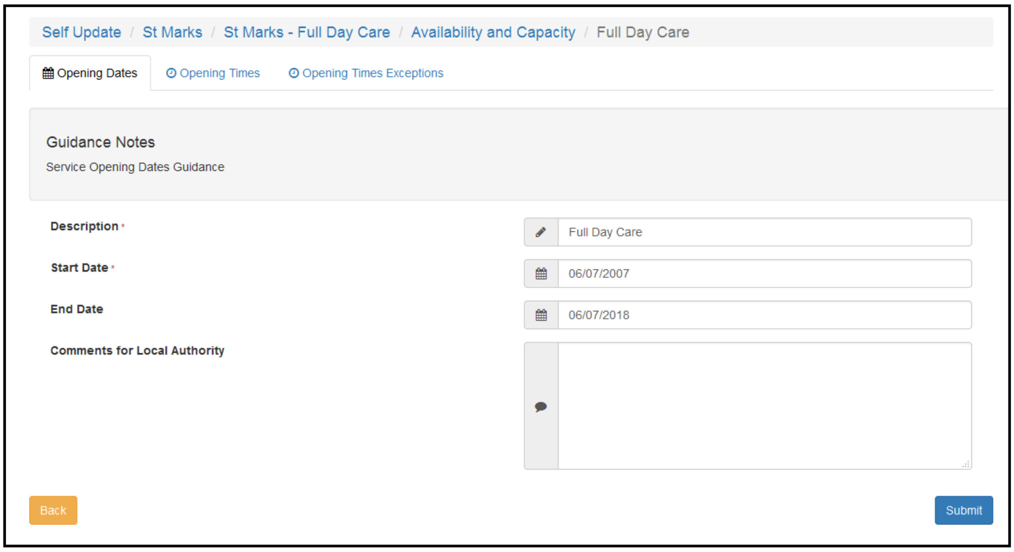
Updating an Existing Opening Date

To update the opening and closing dates, opening times and opening time exceptions for the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 55



2. To update existing opening dates:
   a. Click the link on the opening dates description to display the **Opening Dates** tab.



   b. If required, select the **Opening Times** or **Opening Times Exceptions** tab.
   c. Make changes to the current information.
   d. Click the **Submit** button.

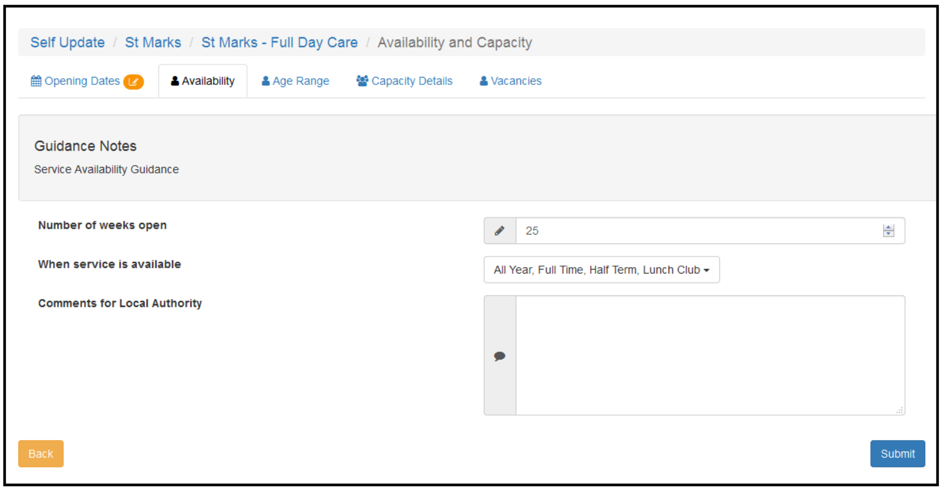
Updating the Availability of the Service

To update the information about when the service is open and available:

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see *[Viewing Service and Consent Details](#)* on page 55

To update availability:

a. Select the **Availability** tab.



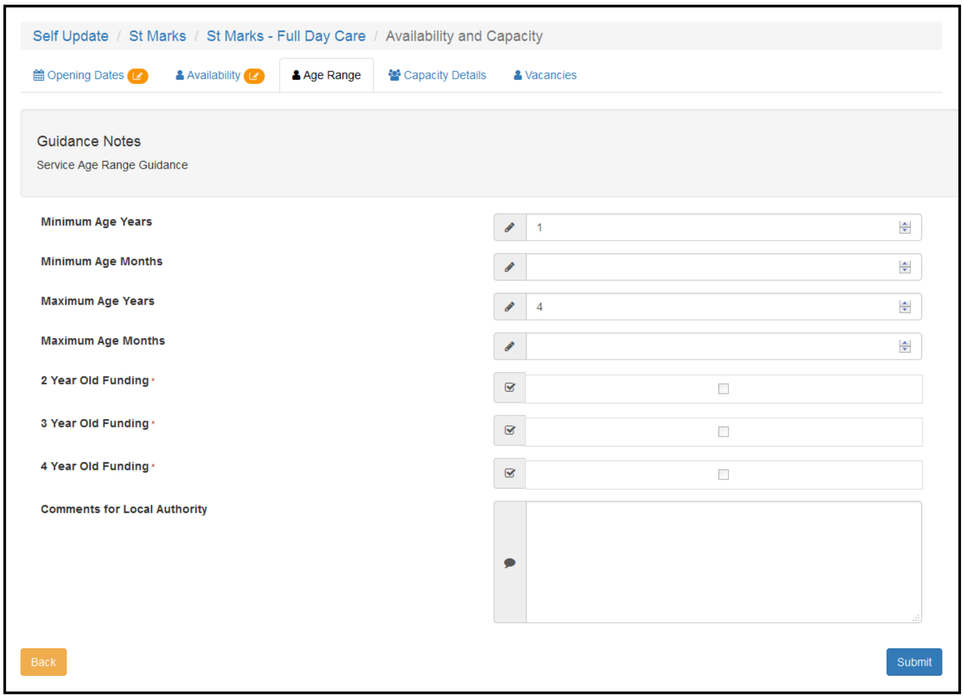
b. Enter the required information.

c. Click the **Submit** button.

Updating Age Ranges at the Service

To update the minimum and maximum age range and funding details for the service:

1. View the basic details for the service and select the Availability and Capacity tab.
2. Select the **Age Range** tab.

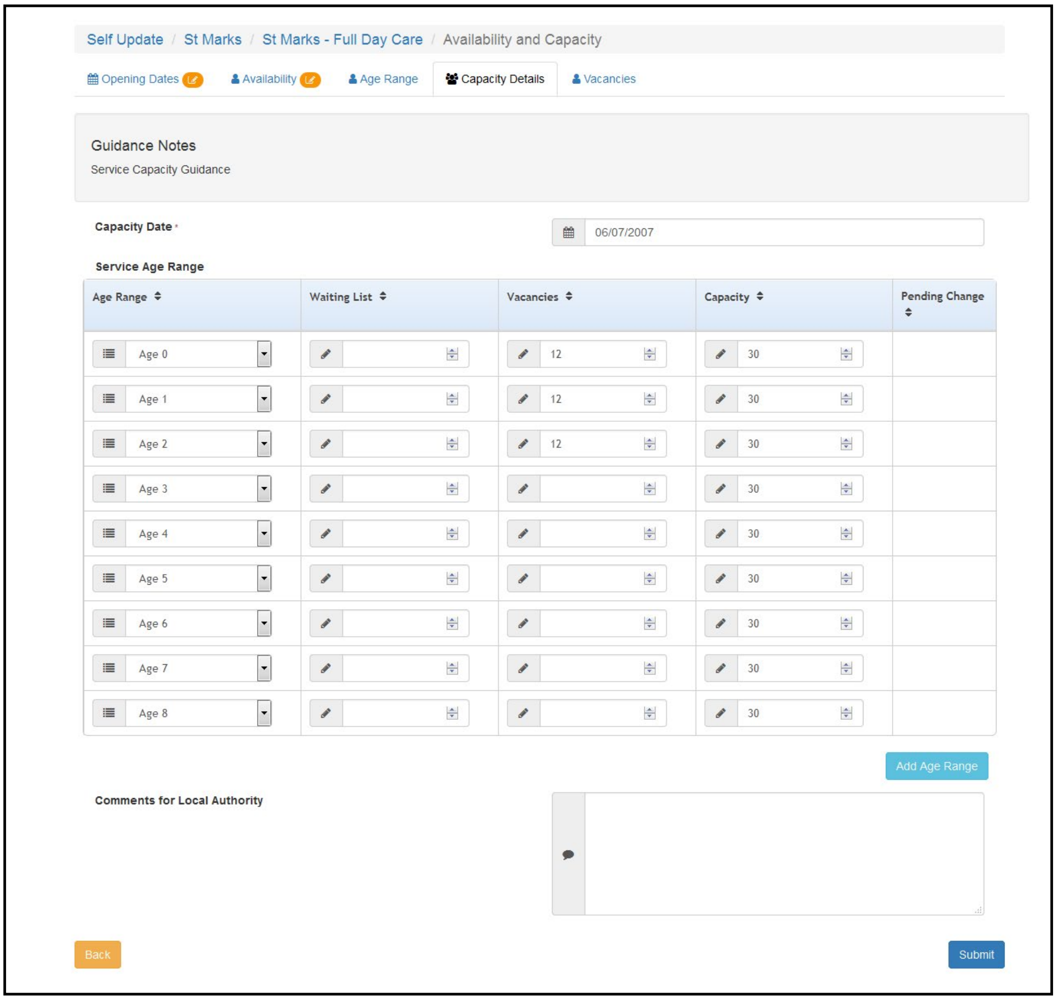


3. Enter the required information.
4. Click the **Submit** button.

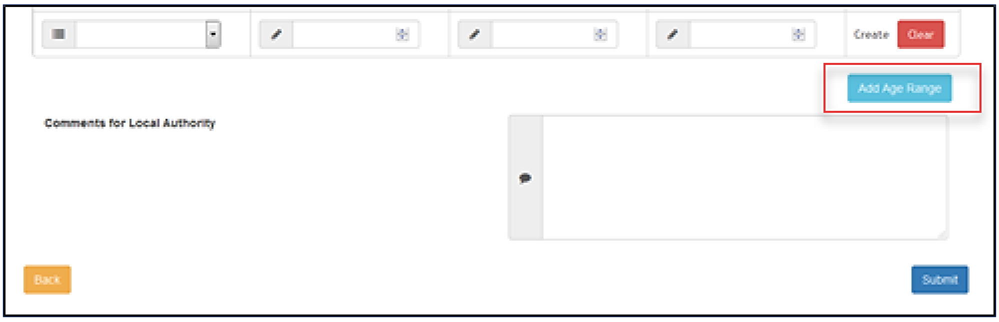
Updating the Capacity Details for the Service

To update the capacity information, including the number of vacancies and waiting list numbers for each age range at the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see *Viewing Service and Consent Details* on page *55*.
2. Select the **Capacity Details** tab.



3. Make changes to the current information.
4. If required, to add a new age range:
   a. Click the **Add Age Range** button.



   b. Select an **Age Range** from the drop-down.
   c. Enter the capacity details for the new age range.

d. Click the **Create** button.

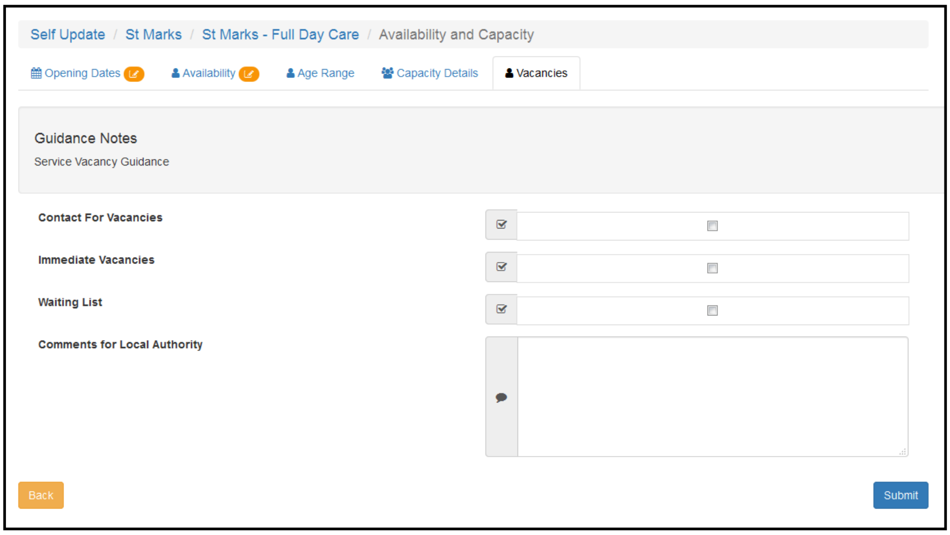
5. Click the **Submit** button.

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing All Related Changes on page *83*.

Updating the Vacancy Details

To update the information about vacancies, including contacting the service about vacancies and whether the service has a waiting list:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see Viewing Service and Consent Details on page 55.
2. Select the **Vacancies** tab.



3. If required, select or deselect the check boxes and enter comments.
4. Click the **Submit** button.

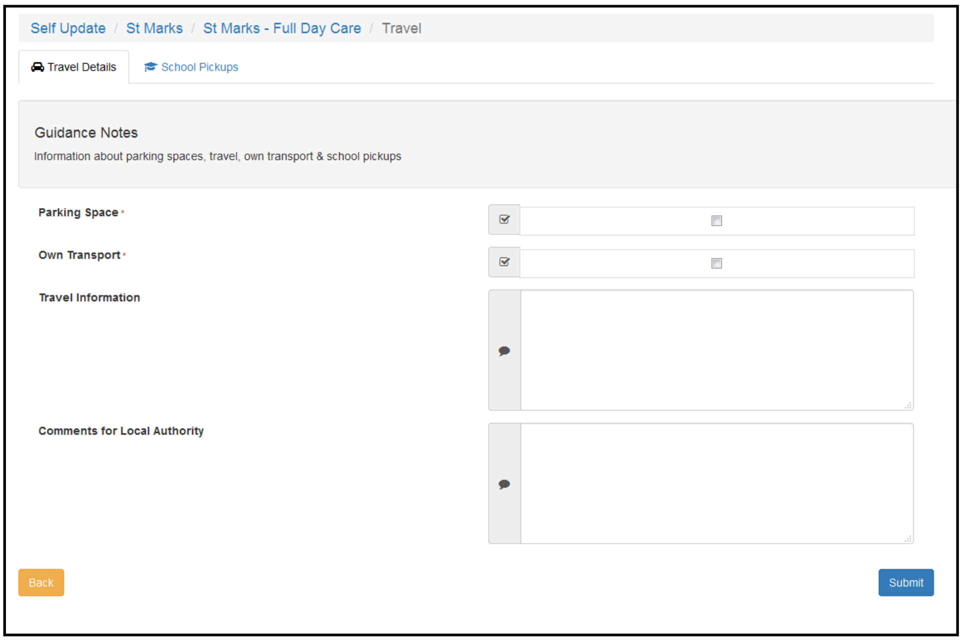
The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see Clearing Submitted Changes on page *82*.

Updating Travel Information

Travel information and details of school pickups for the service are updated via the **Travel** tab.

1. View the basic details for the service and select the **Travel** tab. For information about how to view the service details, see Viewing Service and Consent Details on page55.
2. To update details about parking spaces, own transport and travel:

a. Select the **Travel Details** sub-tab.

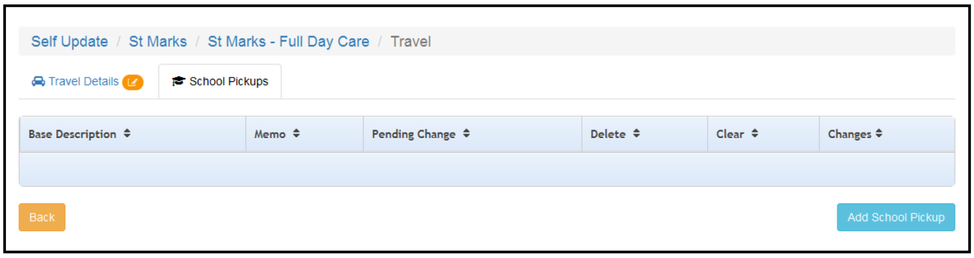


b. If required, select or deselect the check boxes, enter **Travel Information** and comments.

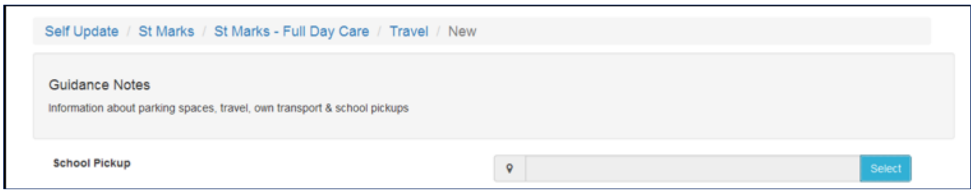
c. Click the **Submit** button.

3. To add a new school pickup:

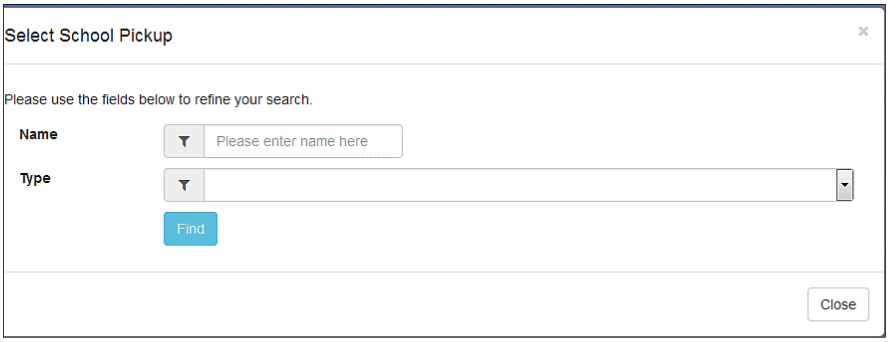
a. Select the **School Pickups** sub-tab.



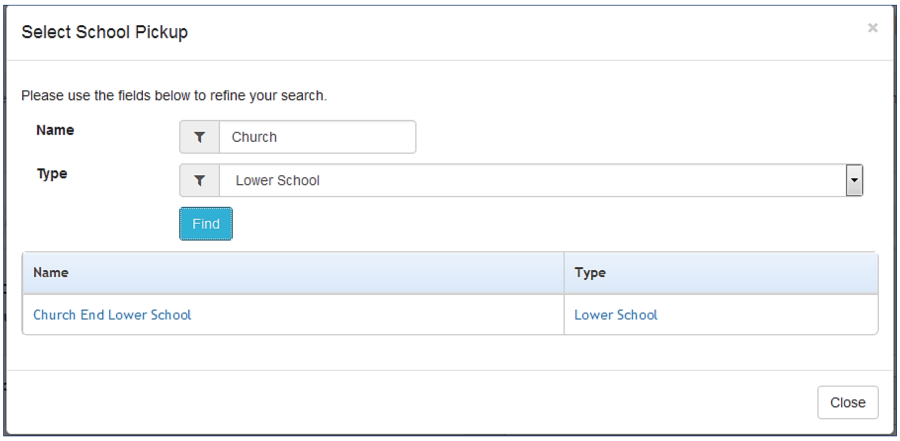
b. Click the **Add School Pickup** button.



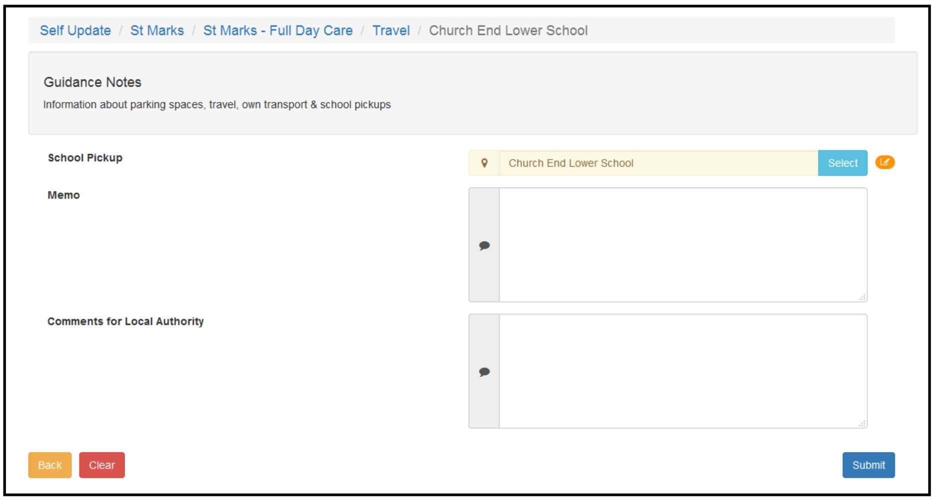
c. Click the **Select** button to display the **Select School Pickup** dialog.



d. Enter search details for the required school and click the **Find** button.



e. Select the required school in the list.
f. If required, add a **Memo** and comments.
g. Click the **Submit** button.

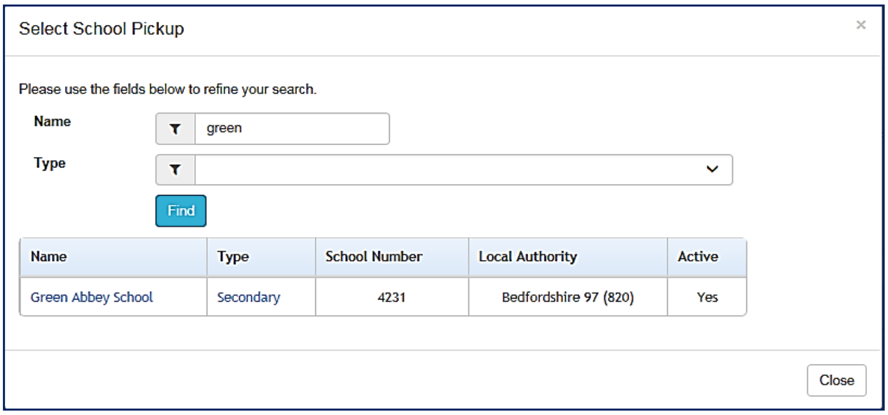


Changes to school pickups

Local authorities have been provided with the ability to set a base or a base group against **School pickups base group** on the General Configuration page.

Bases group can be created to restrict the list of bases the provider will see when selecting school pickups in the following location: **Provider Portal | Self Update | Travel | School Pickups**.

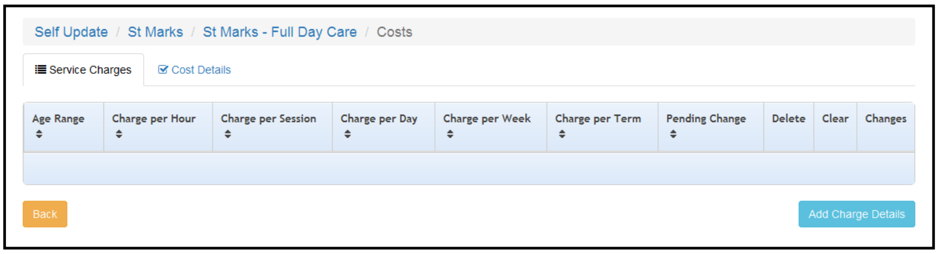
The **Add School Pickup button** in the Travel section now displays more information about the base in the returned list.



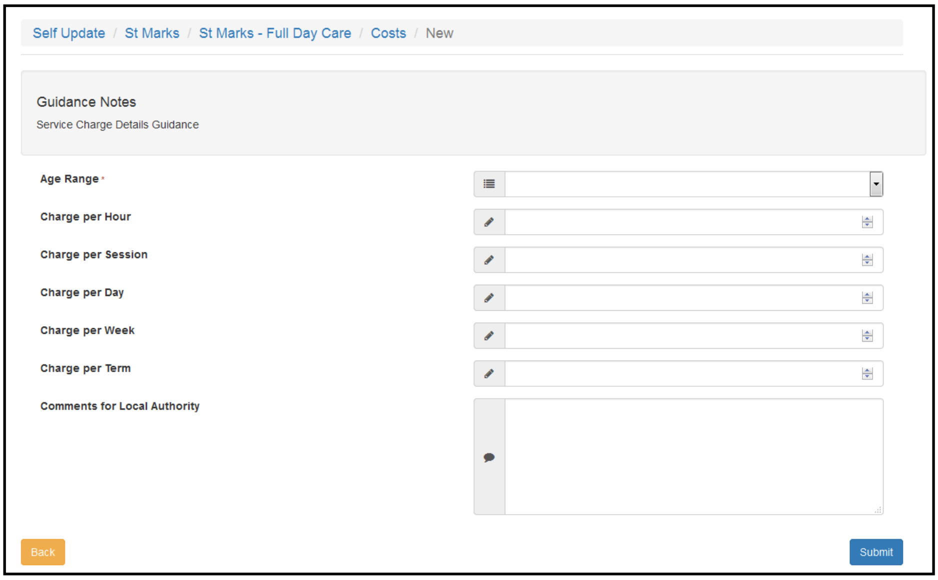
Updating Service Charges

Service charges for each age group are updated via the **Service Charges** sub-tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*.
2. Click the link for the required service to display the **Service Details** tab.
3. To add new service charges:
   a. Select the **Costs** tab to display the **Service Charges** sub-tab.

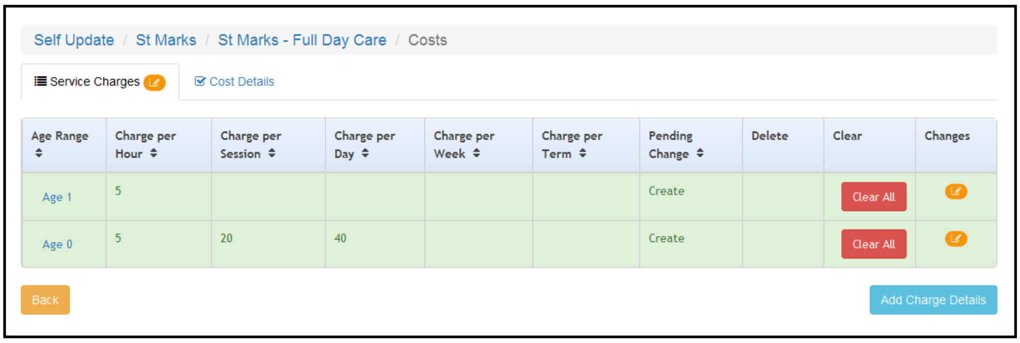


   b. Click the **Add Charge Details** button.

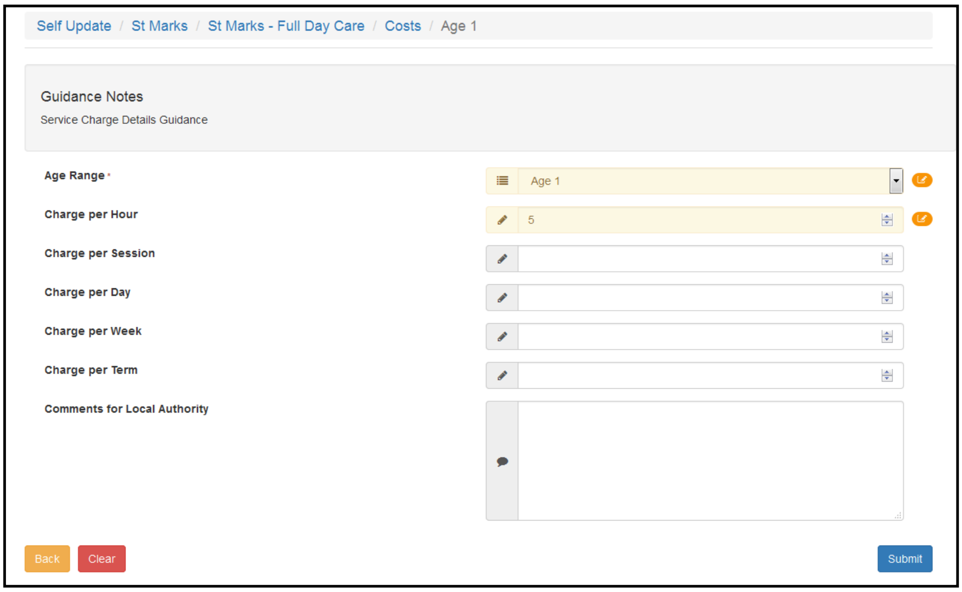


   c. Select an **Age Range** from the drop-down.
   d. If required, enter charges and comments.
   e. Click the **Submit** button.

4. To update service charges:
    a. Select the **Costs** tab to display the **Service Charges** sub-tab.



    b. Select the required **Age Range** to display the details.

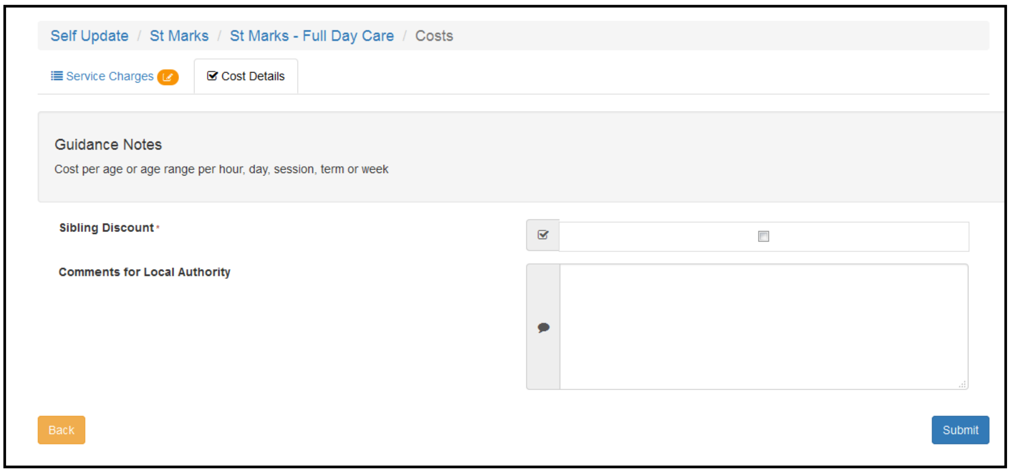


    c. Update the required details.
    d. Click the **Submit** button.

Updating Cost Details

Cost details are updated via the **Cost Details** sub-tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Costs** tab.
4. Select the **Cost Details** sub-tab.

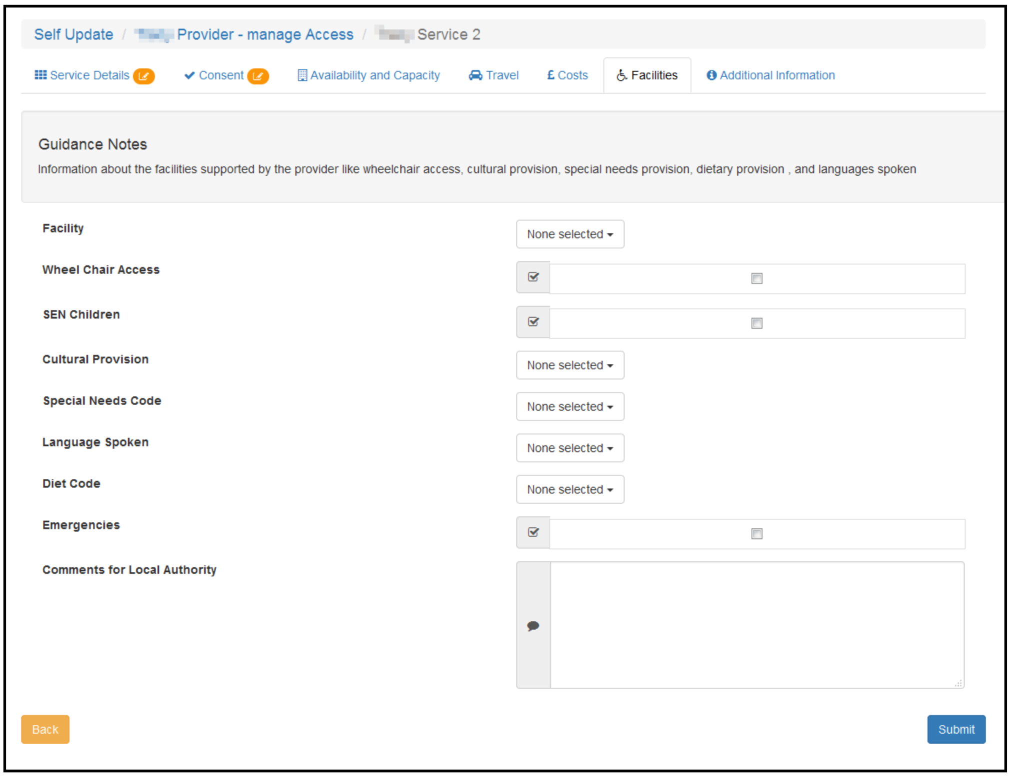


5. If required, select or deselect the **Sibling Discount** check box and add comments.
6. Click the **Submit** button.

Updating Facilities

The facilities supported at the service are updated via the **Facilities** tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Facilities** tab.

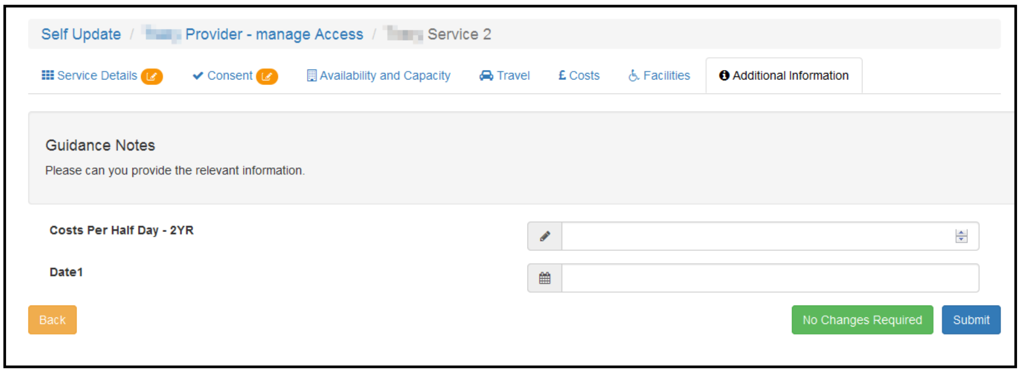


4. If required, select or deselect the check boxes, select from the drop-down lists and enter comments.
5. Click the **Submit** button.

Updating Additional Information

The additional information for the service is updated via the **Additional Information** tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see Viewing Providers and Services on page *50*.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Additional Information** tab.



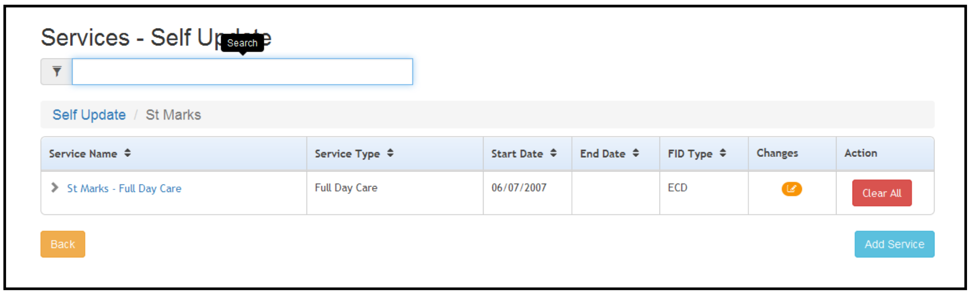
4. If required, make changes to the information.
5. Click the **Submit** button.

Adding a Service

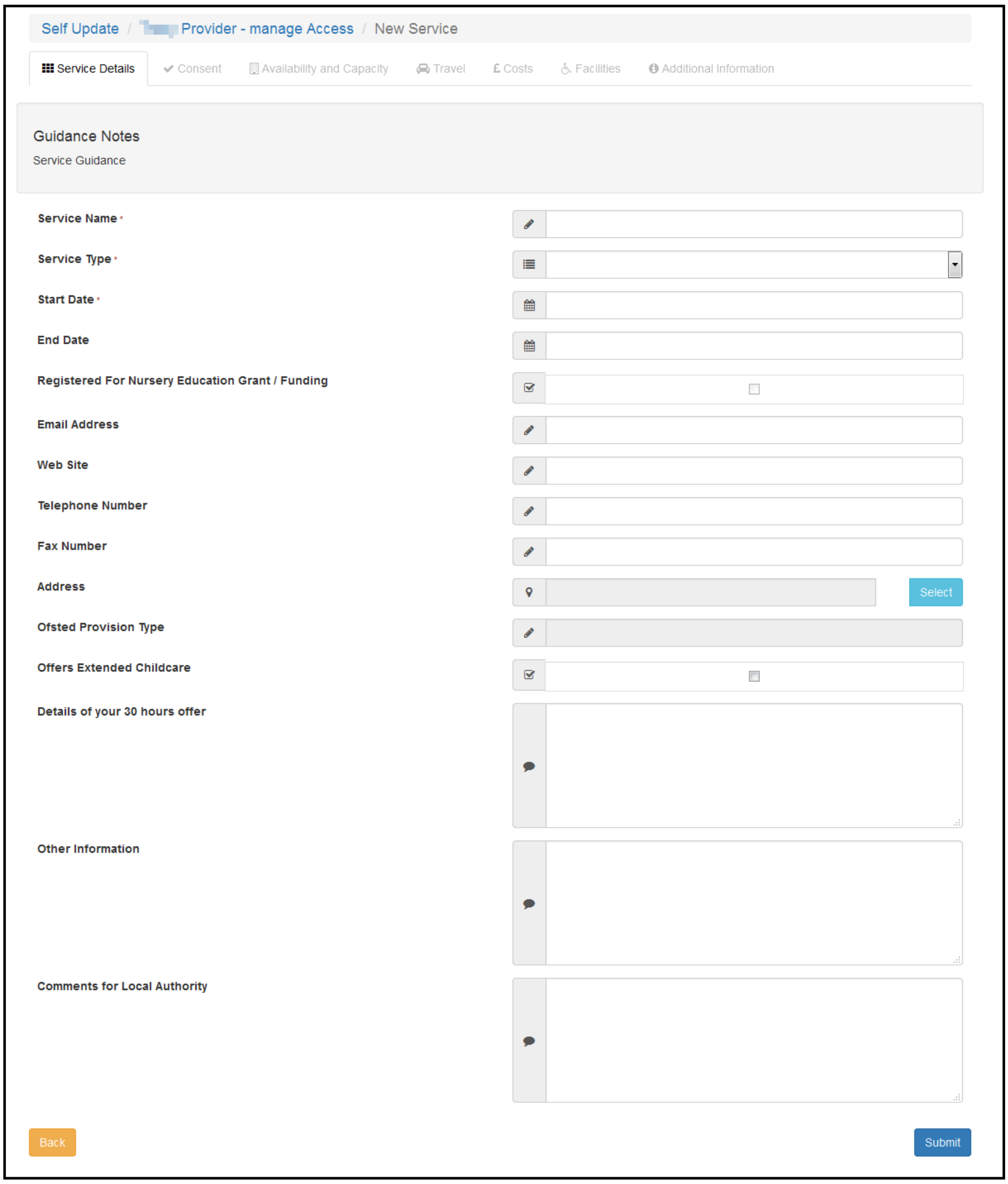
The ability for providers to add new services is enabled or disabled via the **Self Update - General Configuration** page. If **Enable provider users to add services** is set to **On**, a provider can add a new service. For more information, see Configuring the Self Update Portal on page *18*.

To add a new service:

1. View a list of services for the provider. For information about using the Self Update Provider Portal to view your services, see Viewing Service Details on page 50.



2. Click the **Add Service** button to display the **New Service** page.



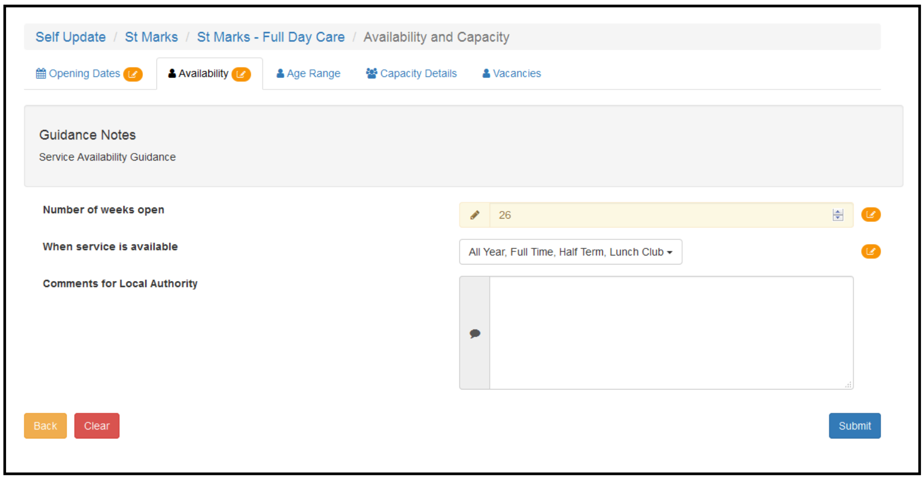
3. Enter a **Service Name**.
4. Enter a **Start Date**.
5. Select **Service Type** (*Table ID: 0423*)
6. If required, select the **Registered For Nursery Education Grant/Fund** check box.
7. If required, enter one or more of the following contact information:
   - **Email Address**
   - **Web Site** address
   - **Telephone Number**
   - **Fax Number**.
8. If required, click the **Select** button to open the **Address Search** and select an address. For more information, see Selecting an Address on page *65*.
9. If required, enter remaining details:
   - **Ofsted Provision Type**

- **Details of your 30 hours offer**
- **Other Information**
- **Comments for Local Authority**.

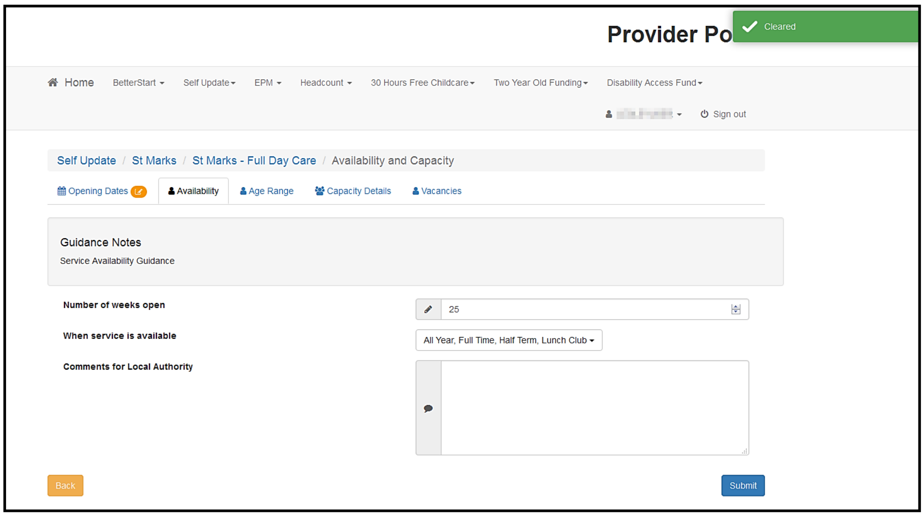
10. Click the **Submit** button.

Clearing Submitted Changes

If a provider has submitted changes but the Local Authority has not approved them, they can be cleared.



To clear submitted changes and remove the **Pending changes** icon from the tab, click the **Clear** button.

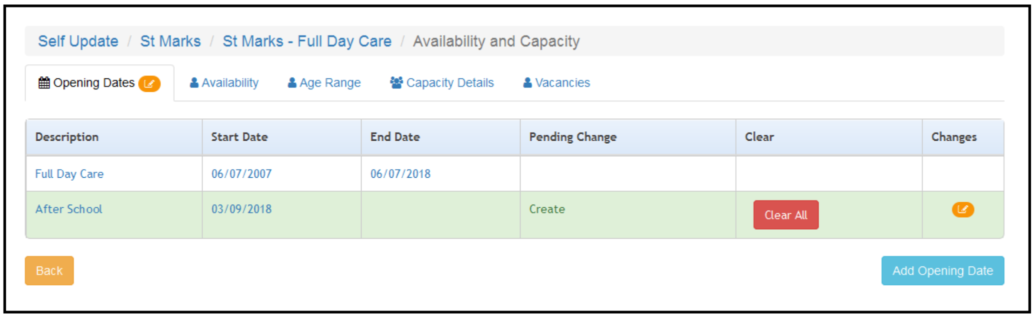


Clearing All Related Changes

If there are pending changes for related records, they can all be cleared at once.

For example, to clear all changes for a new opening date:

1. View the availability and capacity details currently held for the service. For more information, see Viewing Availability and Capacity on page *55*.



2. Click the **Clear All** button.

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