



# Early Years Headcount Provider Portal

last updated for the Spring 2020 release

Handbook

**CAPITA**

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# 01 | Document Change Control

| Date        | Release | Description   |
|-------------|---------|---|
| Spring 2020 | 3.71    | <p><b>Add Child - Address</b></p> <p><b>Building Name</b> has been added to the Address section in 'Add Child' record. A validation check and message has been implemented against the fields below:</p> <ul style="list-style-type: none"> <li>• House Number</li> <li>• House Name</li> <li>• Building Name</li> </ul> <p>A message will appear against each field if all 3 are left blank.</p> <p>For more information see <a href="#">Adding a Child to the Headcount</a> page 25</p>   |
| Autumn 2019 | 3.70    | <p><b>Provider Headcount Portal - Start Dates</b></p> <p>Amendments to a child's start date either through the headcount portal or against the child's funded service or school history have been amended to synchronise with each other. This will ensure both records hold the same start Date at any given time. If a change is made to the school history start date whilst there is an ongoing headcount task the provider will see the newly updated start date in blue the next time they open the headcount task.</p> <p>For more information see <a href="#">Editing a Task Start Date</a> page 40</p> |
|             |         | <p><b>Provider Headcount Portal - Carer Details</b></p> <p>Validation checks and messages have been introduced on the Carers tab through the <b>Add/Edit</b> Child area of the Provider Headcount Portal. If a provider modifies a carers forename, gender, NI or NASS number they will be presented with a warning message when they attempt to save the carers record.</p> <p>For more information see <a href="#">Validation check for Carers Details</a> page 28</p>  |
|             |         | <p><b>Generating password reset emails</b></p> <p>The email address on the portal has been amended to accept up to 200 characters. This change is reflected in <b>Administration   Review Users</b>, when generating password reset emails.</p>   |
| Spring 2019 | 3.68    | <p><b>Permissions</b></p> <p>Users with Headcount Site Administrator permission but not General Site Administrator will no longer see the Administration menu by default.</p> <p>For more information see <a href="#">Permission to Access Headcount</a> page 18</p>  |

| Date        | Release | Description  |
|-------------|---------|--|
|             |         | <p><b>Manage Access - Audit log</b></p> <p>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.</p> <p>For more information see <a href="#">Audit Log</a> page 15</p>   |
|             |         | <p><b>Carer Date of Birth</b></p> <p>A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number.</p> <p>For more information, see <a href="#">Recording Carer Details</a> page 26.</p>   |
|             |         | <p><b>Service Provider Names</b></p> <p>Both the Provider and Service Name is now shown through the Manage Access and Task Details screens.</p> <p>For more information See <a href="#">Viewing Tasks</a> page 20</p>  |
| Autumn 2018 | 3.67    | <p><b>Removal of a Child from a Headcount Task</b></p> <p>When a child is removed from a funded service, the child will be removed from active Headcount tasks.</p> <p>For information see <a href="#">Removal of a Child from a Headcount Task</a> page 41</p>  |
|             |         | <p><b>Notification for missing data</b></p> <p>New configuration option to allow the LA to define how missing child information should be processed by providers. There are 3 options: no action, required, and highlight only.</p> <p>For more information see <a href="#">Notification alert for missing data</a> page 58</p>  |
|             |         | <p><b>Changes to Headcount Configuration for 2 year old funding</b></p> <p>New configuration settings to allow more flexibility and control over when 2 year old can have funded hours claimed against them and to allow LAs to determine whether providers can amend the Funded Status of 2-year olds</p> <p>For more information see <a href="#">Changes to Headcount Configuration for 2 year old funding</a> page 60</p> |
| Summer 2018 | 3.66    | <p>For the One Summer 2018 release (3.66), changes have been made to the Eligibility Checking Service (ECS) settings.</p> <p>For more information, see <a href="#">Configuring the Link to the ECS</a> page 57.</p>  |

# 02 | Headcount

## Using this Handbook

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

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

### More Information:

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

For information regarding setting up Early Years Headcount, refer to the Technical Guide: *Setting Up One Headcount for Local Authorities*.

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

## Overview

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

### Early Years Pupil Premium

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

### More Information:

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

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

For more information, see [Executing a Task](#) on page 21.

## Administration

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

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

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



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

## Setting the Language in Chrome

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

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

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

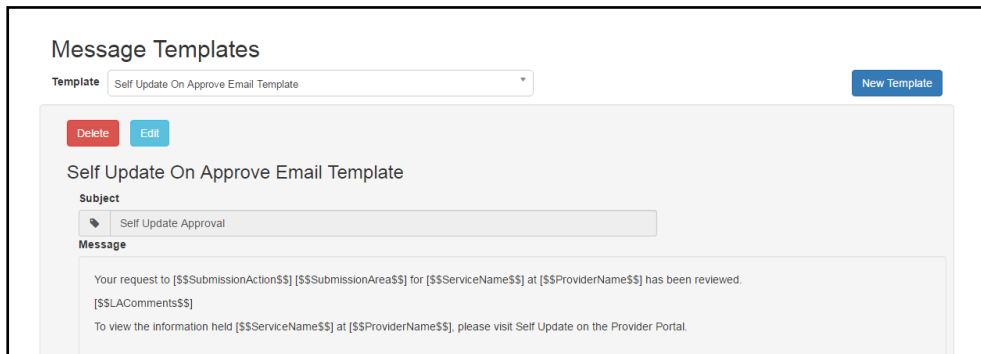
## Common Functionality

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

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

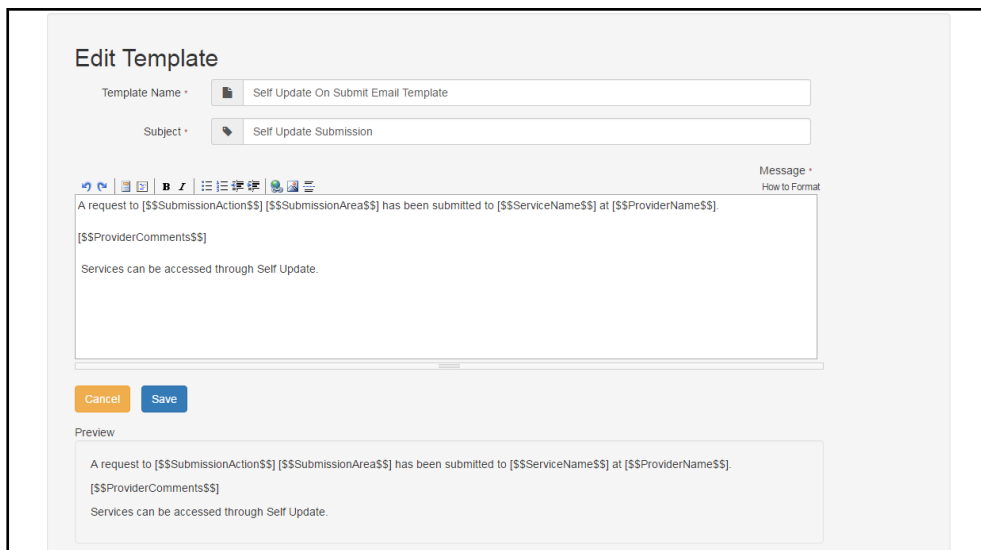
## Message Templates

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.

# 03 | Managing Users

## Introduction

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

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

User creation is a three stage process.

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

Secondly, the user must be assigned to the correct security group in the v4 Client. Headcount users should be members of the Provider Portal Headcount User group. Provider Administrators must be in the security group Provider Portal Headcount Administrators.

Finally, after a headcount user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider Portal via the **Manage Access** area. For more information, see [Managing User Access](#) on page 13.

## Creating a Portal User Account

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

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

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

## Activating a Portal User Account

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

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

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

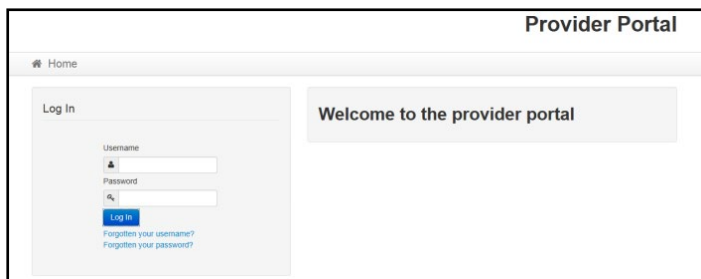
They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

### More Information:

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

## Logging into the Portal

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



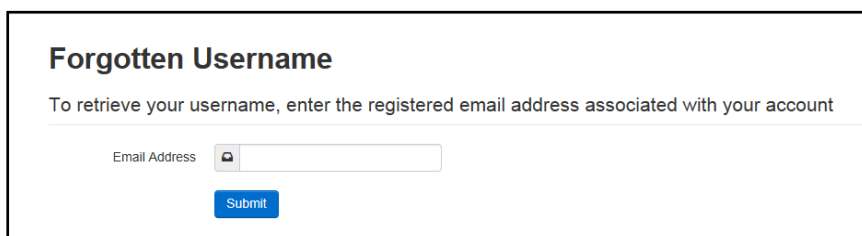
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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

## Retrieving Your User Name

If you forget your user name:

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

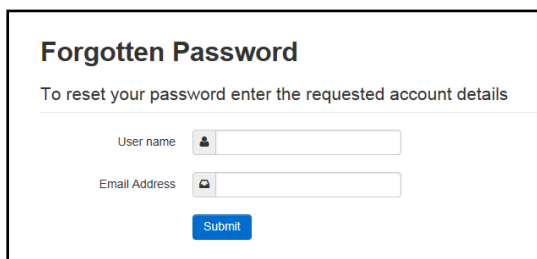


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

## Resetting Your Portal Password

To reset your password:

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



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.

3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.

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

## Resetting Your Secret Question

If you need to reset your secret question:

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

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

### More Information:

For more information about enabling second factor authentication, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* available on the One Publications website ([www.onepublications.com](http://www.onepublications.com)).

## Managing User Access

### Granting Access to Providers and Services

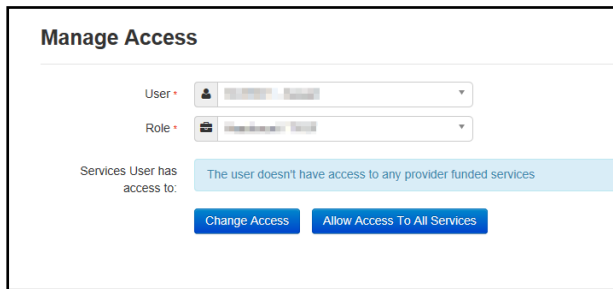
After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

To update access for the selected user:

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

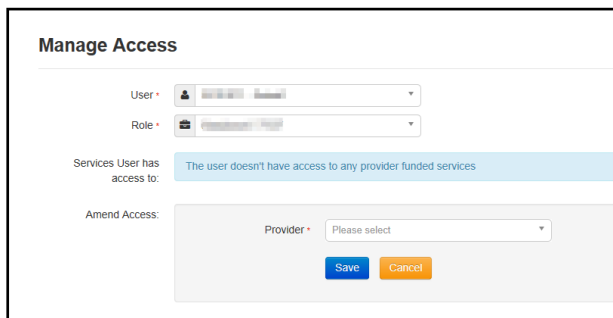
## Managing Users

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



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

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



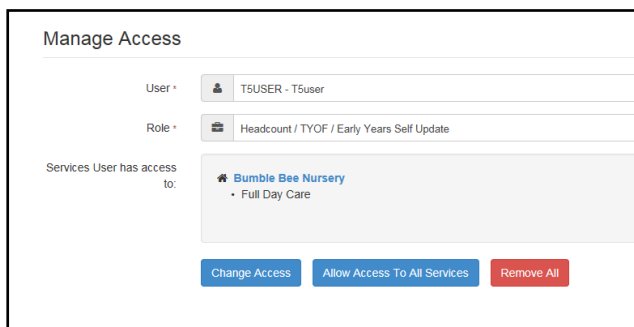
The screenshot shows the 'Manage Access' interface with the 'Amend Access' panel open. The 'User' and 'Role' dropdowns are visible. The message 'Services User has access to: The user doesn't have access to any provider funded services' is still present. The 'Amend Access' panel contains a 'Provider' dropdown menu with 'Please select' as the current selection, and two buttons: 'Save' and 'Cancel'.

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

## Removing Access from a User

To remove a user's access to all services:

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



The screenshot shows the 'Manage Access' interface. The 'User' dropdown is set to 'TSUSER - Tuser' and the 'Role' dropdown is set to 'Headcount / TYOF / Early Years Self Update'. The message 'Services User has access to:' is followed by a list of services: 'Bumble Bee Nursery' with a sub-item 'Full Day Care'. At the bottom, there are three buttons: 'Change Access', 'Allow Access To All Services', and 'Remove All'.

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

## Audit Log

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

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

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

## Reviewing Users

### Introduction

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

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

### Viewing User Details

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

The screenshot shows the 'Review Users' interface. At the top, there is a search bar with a 'Name' input field and a 'Search' button. Below the search bar, it indicates '42 Records Found'. A table lists user details with columns for Username, Description, Active, Registered, Email, Groups, and Action. The table contains two rows: 'TestUser' (Admin user for EPM, Active, Registered with a red X, Email: Testuser14@onetestsr, Groups: EPMADMIN, Action: Reset Password, Reset Account) and 'VPADM' (vpadm, Active, Registered with a green check, Email: testuser10@onetestsr, Groups: PP Headcount Adm, Action: Reset Password). At the bottom of the table, there are 'Cancel' and 'Refresh' buttons. To the right of the table, there are pagination controls showing 'Page 5 of 5' and page numbers 1, 2, 3, 4, 5, with 'Next >>'.

| Username | Description        | Active | Registered | Email                | Groups           | Action                        |
|----------|--------------------|--------|------------|----------------------|------------------|-------------------------------|
| TestUser | Admin user for EPM | ✓      | ✗          | Testuser14@onetestsr | EPMADMIN         | Reset Password, Reset Account |
| VPADM    | vpadm              | ✓      | ✓          | testuser10@onetestsr | PP Headcount Adm | Reset Password                |

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

### Updating a User Email Address

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

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

## Resetting a User Password

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

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

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

## Resetting a User Account

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

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

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

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

**NOTE:** The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see [Resetting a User Password](#) on page 16

## Setting Up Two Step Verification

### Introduction

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

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

### Enabling Two Step Verification

To enable two step verification:

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



Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

**Preferred method**

No Two Step Verification

Save

2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
  3. Click the **Save** button.
- You will be signed out and will need to sign in again.

### Disabling Two Step Verification

To disable two step verification:

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

Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

**Preferred method**

Email

Save

2. Select **No Two Step Verification** from the **Preferred method** drop-down.
  3. Click the **Save** button.
- You will be signed out and will need to sign in again.

## Assigning Permissions

### Permission to Access Headcount

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

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

- Headcount Site Administrator

This permission provides access to Headcount and 30 Hours Free Childcare tile only. The Administration menu will no longer be accessible unless additional permission to General Site Administrator is assigned.

- Headcount Task Viewer

- Headcount User.

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

Save

01. Main Processes

Main Business Processes: Provider Portal

02. Business Processes

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

# 04 | Home page

## Provider Portal Home Page

### Introduction

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

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

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

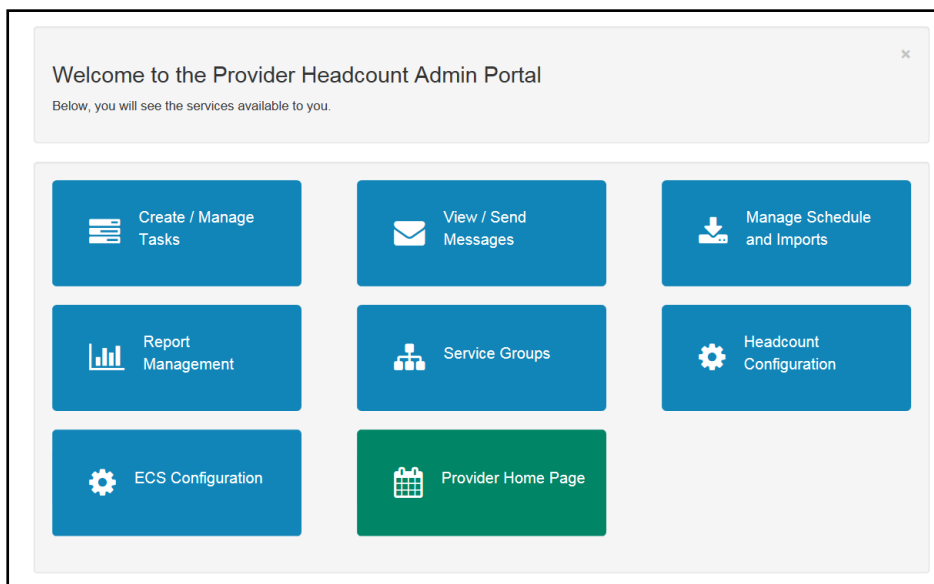
**NOTE:** The facility to change your password or secret question is accessed by clicking the drop-down adjacent to your user name.

### Navigating within the Provider Portal

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

## Managing Provider Headcount Administration

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



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

- Tasks
- Messages
- Manage Imports

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

## Viewing and Executing Headcount Tasks

### Viewing Tasks

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

Tasks

[Create Task](#)

Service: ALL

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

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

**NOTE:** The browse displays active services only.

Selecting a task will display the Task Details screen which shows both the Provider and Service name.

Task Details

Headcount (Forecast) for Spring Term 2019 (01 Jan 20 - 31 Mar 20) for 3 year olds is required

Service: ALL

| Provider         | Service         | Funded | Service Type    |
|------------------|-----------------|--------|-----------------|
| ARCDEL Provider2 | ARCDEL Service1 | T      | Breakfast Clubs |

Manage Access screen displaying both the Provider and Service name.

Manage Access

User: HEADCOUNTADMIN1 - Headcountadmin1

Role: Headcount / TYOF / Early Years Self Update / Better Start.

- ARCDEL Provider1
  - ARCDEL INTG Provider Service
  - ARCDEL INTG Service2

**More Information:**

[Creating a New Task](#) on page 36.

[Managing User Access](#) on page 13.

## Executing a Task

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

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

**My tasks**

- Headcount (Actual) for Spring 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**  
St Marks - Full Day Care  
Status: Edited but not yet submitted, Due 11 days
- Headcount (Actual) for Summer 2017 2017 for 2 year olds, 3 year olds, 4 year olds is required**  
EY\_BASE[9621] - EY\_SERVICE[1343]  
Status: Unsubmitted, Due 11 days
- Headcount (Amendment) for Summer 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**  
testk provider - testk ser  
Status: Unsubmitted, Due 11 days
- Headcount (Amendment) for Summer 17 2017 for 4 year olds is required**  
testk provider - testk ser  
Status: Unsubmitted, Due 11 days
- Headcount (Forecast) for Autumn 17 2017 for 4 year olds is required**  
testk provider - testk ser  
Status: Unsubmitted, Due 11 days
- Headcount (Forecast) for Summer 17 2017 for 2 year olds, 3 year olds, 4 year olds is required**  
testk provider - testk ser  
Status: Edited but not yet submitted, Due 11 days

[View all tasks](#)

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

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

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

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

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

Buttons: Add Child, Edit Headcount, Download, Submit

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

If it is set to **Off**, providers can enter universal and extended hours separately as shown in the following graphic. For more information, see [Updating Submission Grid Columns](#) on page 63.

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

Status: Unsubmitted Deadline: 31 May 2017

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

Filter by Forename or Surname or Age

Add Child Edit Headcount Download Submit

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

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

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

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

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

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








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

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

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

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

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

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

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

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

**NOTE:** In order to perform an eligibility check on economic grounds for Early Years Pupil Premium, carer details must be recorded. Child details cannot be edited and headcount information cannot be submitted until either the carer details are recorded or the **Decline to Provide** radio button is selected. To record a Carer details, see [Recording Carer Details](#) on page 26

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

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

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

**More Information:**

[Editing Child Details](#) on page 26  
[Adding a Child to the Headcount](#) on page 24  
[Recording Carer Details](#) on page 26  
[Editing the Headcount Information](#) on page 29  
[Adding a New Attendance Line](#) on page 31  
[Submitting Headcount Information](#) on page 33

## Adding a Child to the Headcount

| Headcount (Actual) for 2, 3 & 4 year olds   |          |              |         |               |             |            |          |                         |                                 |                         |                                  |                                  | Status: Submitted  | Deadline: 31 May 2017           |  |
|---|----------|--------------|---------|---------------|-------------|------------|----------|-------------------------|---------------------------------|-------------------------|----------------------------------|----------------------------------|--|---------------------------------|--|
| test kp / kp ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)   |          |              |         |               |             |            |          |                         |                                 |                         |                                  |                                  | <ul style="list-style-type: none"> <li>You can edit and re-submit this information at any time until the deadline of 31 May 2017.</li> <li>If you do make a change don't forget to re-submit.</li> </ul> |                                 |  |
| <input type="text"/> <input type="button" value="Add Child"/> <input type="button" value="Edit Headcount"/> <input type="button" value="Download"/> <input type="button" value="Submit"/> |          |              |         |               |             |            |          |                         |                                 |                         |                                  |                                  |  |                                 |  |
|   | Forename | Surname      | Funding | Date of birth | Funding Age | Start Date | End Date | Weeks Attended for term | Average Hours Attended per week | Hours Attended for term | Universal Hours Claimed per week | Universal Hours Claimed for term | Extended Hours Claimed per week  | Extended Hours Claimed for term |  |
|   | Test     | Child School | 5       | 24/05/2014    | 3           | 24/05/2016 |          | 10.00                   | 20.00                           | 200.00                  | 15.00                            | 150.00                           | 0.00   | 0.00                            |  |

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

### Add Child

Please enter the child's forename and surname

Forename

Surname

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

**NOTES:** If there is already a child at the provider with this forename and surname, the details of the existing child are displayed on the **Duplicate Child Warning** screen. Also, if a child with this name has had an ad hoc 30 hours eligibility check performed, these details are also displayed. For more information, see [Checking for a Duplicate Child](#) on page 28.

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

### Add Child

Forename  Child's legal forename

Middle Name

Surname

Gender  Male  Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

SEND Status

Eligibility Code

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

Postcode

**\* Required field**



**NOTES: Middle Name and SEND Status are only displayed if the Local Authority have selected this option via the *Headcount Configuration* page. For more information, see [Updating](#) on page **Error! Bookmark not defined.****

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

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

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

Alternatively, click the **Enter Address Manually** link and enter an address.

In the address section **Building Name** is a new field added. A Validation check has been implemented against the fields below:

- House Number
- House Name
- Building Name

|                |                      |   |
|----------------|----------------------|---|
| House Number * | <input type="text"/> | <b>Either House Name, House No or Building Name is required</b> |
| House Name     | <input type="text"/> | <b>Either House Name, House No or Building Name is required</b> |
| Building Name  | <input type="text"/> | <b>Either House Name, House No or Building Name is required</b> |

A message will appear against each field if all 3 are left blank and the Save button is selected.

10. Click the **Save** button.  
If required, select the **Carer Details** tab to record new carer details.

## Editing Child Details

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

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

- Forename: [Text input]
- Surname: [Text input]
- Gender:  Male,  Female
- Date of birth (dd/mm/yyyy): [Date picker]
- Ethnicity: [Dropdown menu]
- First Language: [Dropdown menu]
- Funded Status: [Dropdown menu]
- Eligibility Code: [Text input]
- Address fields: House Number, House Name, Street Name, District / Village, Town, County, Postcode.
- Buttons: Previous, Next, Cancel, Save.

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

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

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

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

4. Click the **Save** button.

## Recording Carer Details

The **Carer Details** tab is displayed if the child is either 3 or 4 years old. To record a Carer details:

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

The screenshot shows the 'Child Details' form with the 'Carer Details' tab selected. The form displays the following content:

- Message: Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non economic route e.g 'Looked-After' status (LAC).
- Form: Provide Carer Information \*  Yes,  Decline to provide
- Buttons: Previous, Next, Cancel, Save.

- Select the **Yes** radio button to display the **Carer Details** panel.

### Child Details

Personal Details
Carer Details

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

Provide Carer information  **Yes**  
 **Decline to provide**

Carer Details
+ Add Another Carer
✕

Title

Forename

Surname

Gender  Male  
 Female

Date of Birth (dd/mm/yyyy)

Relationship

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

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

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

Address

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

Previous
Next

\* Required field

Cancel
Save

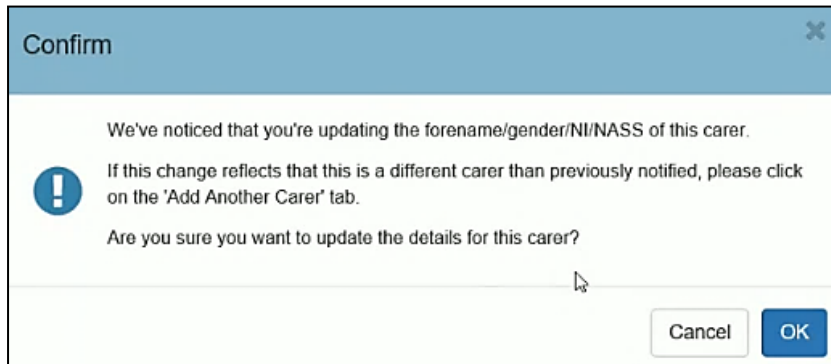
**NOTE:** A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number and therefore too young to be assessed for entitlement to Early Years Pupil Premium.

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

## Validation check for Carers Details

Validation checks and messages have been introduced on the Carers tab through the Add/Edit Child area of the Provider Headcount Portal. If a provider modifies a carers forename, gender, NI or NASS number they will be presented with a warning message when they attempt to save the carers record.

The message that appears is as shown below.



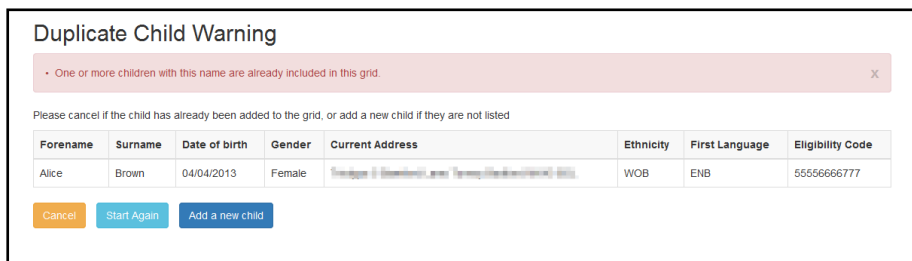
The text in the message displayed can be changed in the location mentioned below by Admin staff.

### Provider Portal | Administration | Text Customisation

1. From the dropdown list in Choose a text Category Select **Headcount | 'Headcount Different Carer Check'** Or;
2. Type Headcount in the Search box and select the Key link for: **'Headcount Different Carer Check'**.
3. The text can now be edited as suitable for you.

## Checking for a Duplicate Child

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



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

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

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

## Editing the Headcount Information

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

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

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

|  | Forename | Surname | Funding | Date of birth | Funding Age | Start Date | End Date | Weeks Attended for term | Average Hours Attended per week | Hours Attended for term | Universal Hours Claimed per week | Universal Hours Claimed for term | Extended Hours Claimed per week | Extended Hours Claimed for term |
|--|----------|---------|---------|---------------|-------------|------------|----------|-------------------------|---------------------------------|-------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|
|  | Aa1      |         | EH      | 01/01/2014    | 3           | 01/09/2017 |          | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
|  | Mem1     |         |         | 02/01/2014    | 3           | 01/09/2017 |          | 10.00                   | 10.00                           | 100.00                  | 10.00                            | 100.00                           |                                 |                                 |
|  | Andrew   |         | EH      | 05/01/2013    | 4           | 01/09/2017 |          | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
|  | Charles  |         | S       | 15/05/2015    | 2           | 01/09/2017 |          | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             |                                 |                                 |
|  | Cheryl   |         | EH      | 20/07/2013    | 4           | 01/09/2017 |          | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
|  | Jimmy    |         |         | 15/08/2013    | 4           | 01/09/2017 |          | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             |                                 |                                 |

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

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

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

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

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

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

| Legal Name | Funding   | Start Date | End Date | Stretched Offer | Weeks Attended for term | Average Hours Attended per week | Hours Attended for term | Universal Hours Claimed per week | Universal Hours Claimed for term | Extended Hours Claimed per week | Extended Hours Claimed for term |
|------------|---|------------|----------|-----------------|-------------------------|---------------------------------|-------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|
|            |   |            |          |                 | 10.00                   | 10.00                           | 100.00                  | 10.00                            | 100.00                           | 0.00                            | 0.00                            |
| Aa1 Aa1    | <span style="color: green;">EH</span> <span style="color: orange;">S</span> | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
| Mm1 Mm1    |   | 01/09/2017 |          |                 | 10.00                   | 10.00                           | 100.00                  | 10.00                            | 100.00                           |                                 |                                 |
| Andrew     | <span style="color: green;">EH</span>                                       | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
| Charles    | <span style="color: orange;">S</span> <span style="color: blue;">N</span>   | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    |                                  |                                  |                                 |                                 |
| Cheryl     | <span style="color: green;">EH</span>                                       | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             | 0.00                            | 0.00                            |
| Jimmy      |   | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             |                                 |                                 |

Cancel Save

**NOTES:** If the child is funded at another service, the **Shared Funding** check box is automatically selected.  
 The columns displayed depend on the options selected on the **Headcount Configuration** page. For more information, see *Displaying the Headcount Grid Configuration* page 6060.

3. Edit the details as required:

- a. Enter a new **Start Date** to update the child’s school history record.

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

- b. Enter an **End Date**.

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

- c. Select a **Stretched Offer**.

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

- d. Enter **Weeks Attended for term**.

- e. Enter **Average Hours Attended per week** to automatically calculate **Hours Attended for term**.

- f. Alternatively, enter **Hours Attended for term** to automatically calculate **Average Hours Attended per week**.

- g. Enter the hours claimed.

**NOTES:**

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

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

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

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

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

## Adding a New Attendance Line

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

**NOTES:** The start and end dates for the attendance lines cannot overlap. The **Add new attendance button** is only displayed if the **Add Line** check box is selected on the **Headcount Configuration** page. For more information, see [Updating Submission Grid Columns](#) on page 63.

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

vp3 / \_ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

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

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

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

**NOTE:** The **Add new attendance button** is only displayed if the **Add Line** column is enabled on the **Headcount Configuration** page. For more information, see [Updating Submission Grid Columns](#) on page 63.

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

vp3 / \_ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

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

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

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

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

vp3 / \_ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

| Legal Name | Funding   | Start Date | End Date | Stretched Offer | Weeks Attended for term | Average Hours Attended per week | Hours Attended for term | Universal Hours Claimed per week | Universal Hours Claimed for term | Extended Hours Claimed per week | Extended Hours Claimed for term |
|------------|---|------------|----------|-----------------|-------------------------|---------------------------------|-------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|
| Aa1 Aa1    | <span style="color: green;">P</span> <span style="color: red;">EH</span><br><span style="color: orange;">S</span> | 01/09/2017 |          |                 | 15.00                   | 25.00                           | 375.00                  | 14.00                            | 210.00                           | 11.00                           | 165.00                          |
| Dd1 Dd1    |   | 01/09/2017 |          |                 | 10.00                   | 10.00                           | 100.00                  | 10.00                            | 100.00                           |                                 |                                 |
|            |   | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             |                                 |                                 |
| Mm1 Mm1    | <span style="color: orange;">S</span>   | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    | 0.00                             | 0.00                             |                                 |                                 |
|            | <span style="color: orange;">S</span> <span style="color: blue;">N</span>   | 01/09/2017 |          |                 | 0.00                    | 0.00                            | 0.00                    |                                  |                                  |                                 |                                 |

Cancel Save

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

## Deleting an Attendance Line

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

**NOTE:** The option to delete attendance lines can be disabled on the **Headcount Configuration** page by deselecting the **Delete Line** check box in the **Submission Grid Columns** panel. For more information, see [Updating Submission Grid Columns](#) on page 63.

To delete an attendance line:

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

vp3 / \_ser / Autumn 17 2017 (01 Sep 17 - 31 Dec 17)

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

Add Child Edit Headcount Download Submit

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

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



## Exporting Headcount Information

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

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

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

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

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

## Submitting Headcount Information

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

### More Information

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

To submit the headcount to your Local Authority:

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

### Submission Declaration

Submission Declaration

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

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

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

## Viewing Data Submitted by a Provider

To view the headcount data that has been submitted:

1. View the required task. For more info, see [Viewing Tasks](#) on page 20.

### Task Details

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

1 Task(s) Service: ALL

| Provider | Service | Funded | Service Type    | Status   |
|----------|---------|--------|-----------------|--|
| test kp  | kp ser  | T      | Breakfast Clubs | <span style="background-color: #28a745; color: white; padding: 2px 5px;">Imported</span> |

Back New Message

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

### Service Detail

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

| Provider | Service | Funded | Service Type    | Status   |
|----------|---------|--------|-----------------|--|
| test kp  | kp ser  | T      | Breakfast Clubs | <span style="background-color: #28a745; color: white; padding: 2px 5px;">Imported</span> |

Children

| Name              | Date of birth | Status   | Status Description    | Status Date      |
|-------------------|---------------|--|-----------------------|------------------|
| Test Child School | 24/05/2014    | <span style="background-color: #28a745; color: white; padding: 2px 5px;">Imported</span> | Imported Successfully | 24/05/2017 08:14 |

Back View Task

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

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

### Headcount (Actual) for 3 year olds

Status: Submitted Deadline: 31 May 2017

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

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

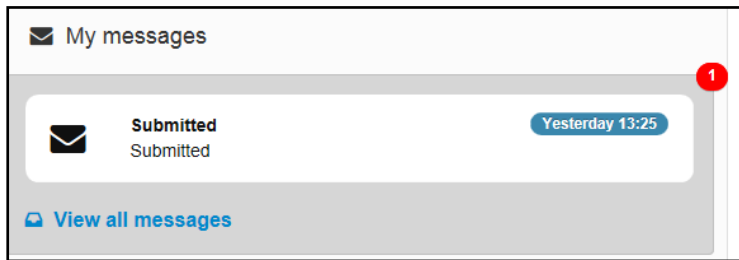
Add Child Edit Headcount Download Submit

|                          | Forename | Surname      | Funding   | Date of birth | Funding Age | Start Date | End Date   | Weeks Attended for term | Average Hours Attended per week | Hours Attended for term | Universal Hours Claimed per week | Universal Hours Claimed for term | Extended Hours Claimed per week | Extended Hours Claimed for term |                          |                          |
|--------------------------|----------|--------------|---|---------------|-------------|------------|------------|-------------------------|---------------------------------|-------------------------|----------------------------------|----------------------------------|---------------------------------|---------------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Test     | Child School | <span style="background-color: #ffc107; color: white; padding: 2px 5px;">S</span> | 24/05/2014    | 3           | 24/05/2016 | 12/02/2018 | 20.00                   | 15.00                           | 300.00                  | 11.25                            | 225.00                           | 0.00                            | 0.00                            | <input type="checkbox"/> | <input type="checkbox"/> |

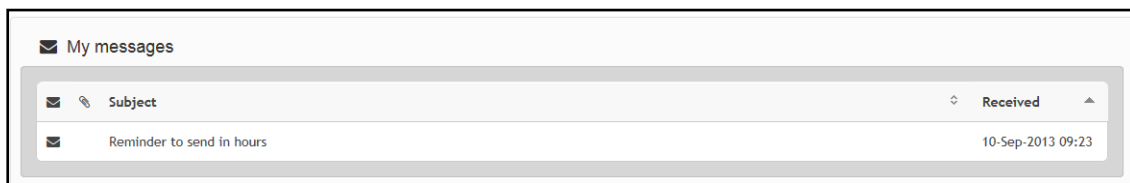
**NOTE:** If children have been added to the grid since it was last viewed, a pop-up message is displayed above the grid.

## Viewing Messages

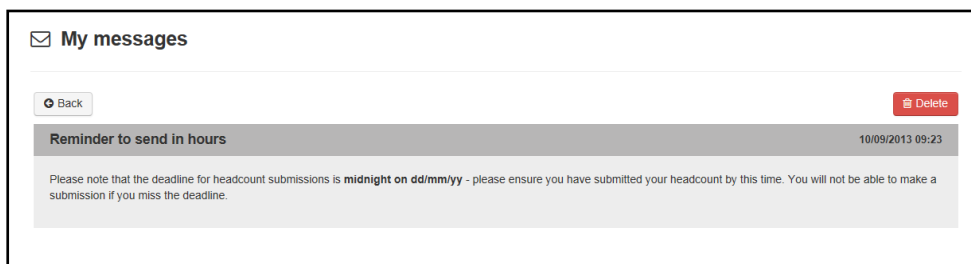
The **My Messages** panel is displayed on the **Home** page and lists the messages sent by this administrator.



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



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



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

# 05 | Issuing Tasks

## Introduction

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

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

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

## Creating a New Task

**NOTE:** Tasks can only be created for active services.

Tasks can be created for:

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

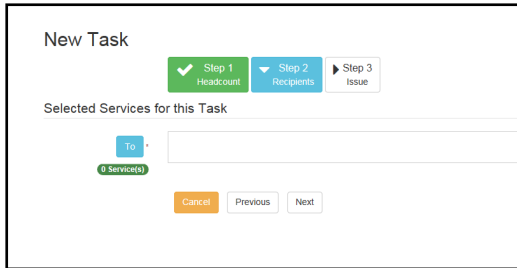
Tasks are created using the New Task wizard.

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

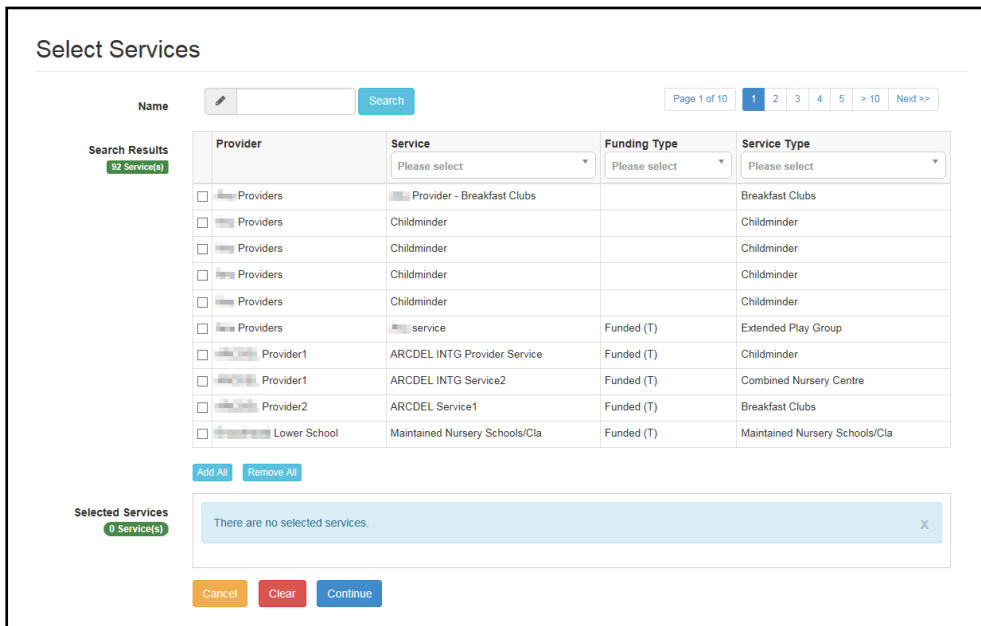
2. Select a **Submission Type**.
3. Select a **Term**.
4. Select one or more check boxes to request the **Ages** to be included.
5. Select a **Deadline Date** for the information to be received.
6. If required, select the **Exclude Reception NCY** check box to display a tick.

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

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



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



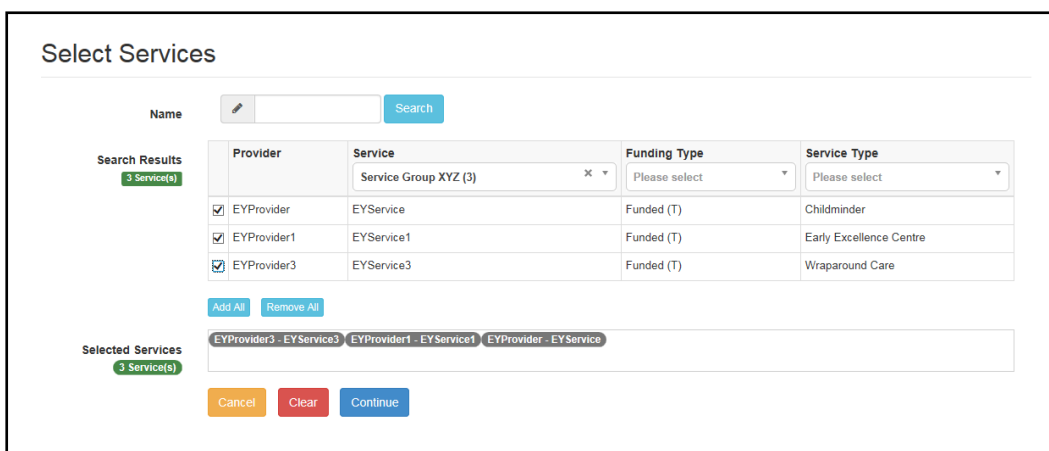
- If required, enter a partial **Provider** or **Service Name** and click the **Search** button to display matching services.

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

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

Click the cross button to remove the filter.

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



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

## Issuing Tasks

### New Task

✔ Step 1  
Headcount
▼ Step 2  
Recipients
▶ Step 3  
Issue

Selected Services for this Task

To
X

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

3 Service(s)

EYProvider - EYService
EYProvider1 - EYService1
EYProvider3 - EYService3

Cancel
Previous
Next

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

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

### New Task

✔ Step 1  
Headcount
✔ Step 2  
Recipients
▼ Step 3  
Issue

Summary

Please confirm that your information is correct

**Submission Type**

**Term**

**Ages**

**Exclude Reception**

**NCY**

**Deadline Date**

**Task Name**

**Selected**

Cancel
Previous
Send

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

## Task Sent

Your task has been created and sent.

OK

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

### Tasks

Create Task

5 Task(s)
Service: ALL

| Name   | Created ▲           | Deadline ▼ | Issued By      | Service Status | Actions |
|--|---------------------|------------|----------------|----------------|---------|
| Headcount (Forecast) for Spring 2018 (01 Jan 19 - 31 Mar 19) for 2 year olds, 3 year olds, 4 year olds is required | 14/09/2017 15:26:21 | 22/12/2017 | LESLEYADMIN    | 3 0 0          | Retract |
| Headcount (Forecast) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds, 3 year olds, 4 year olds is required | 11/09/2017 18:23:50 | 22/09/2017 | SIMQNM         | 2 0 0          | Retract |
| Headcount (Actual) for Autumn 2018 (01 Sep 18 - 31 Dec 18) for 2 year olds is required                             | 11/09/2017 10:15:19 | 30/09/2017 | NAVED          | 0 1 0          | Retract |
| Headcount (Forecast) for Autumn 2017 (01 Sep 17 - 31 Dec 17) for 2 year olds, 3 year olds, 4 year olds is required | 06/07/2017 15:14:19 | 01/12/2017 | TRACY          | 2 0 0          | Retract |
| Headcount (Forecast) for Spring Term 2014 for 2 year olds, 3 year olds, 4 year olds is required                    | 20/01/2015 05:23:25 | 22/01/2015 | HEADCOUNADMIN4 | 1 0 0          |         |

## Viewing Issued Tasks

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

**NOTE:** Tasks can only be viewed for active services.

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

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

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

Select Service

Please select a service

Provider: Select Service

Cancel
OK

- b. Select a service from the drop-down.
  - c. Click the **OK** button.
3. The **Service Status** displays the number of tasks with each status (**Not Submitted** (red), **In Progress** (yellow) or **Completed** (green)).
  4. If required, click the task **Name** hyperlink to display the **Task Details** page.

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

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

## Issuing Tasks

### Service Detail

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

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

Children

| Name                             | Date of birth | Status | Status Description | Status Date |
|----------------------------------|---------------|--------|--------------------|-------------|
| There are no results to display. |               |        |                    |             |

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

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

## Sending a New Message

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

### More Information:

[Composing a New Message](#) on page 43

## Retracting a Task

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

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

## Editing a Task Start Date

Amendments to a child's start date either through the headcount portal or against the child's funded service or school history have been amended to synchronise with each other. This will ensure both records hold the same start Date at any given time. If a change is made to the school history start date whilst there is an ongoing headcount task the provider will see the newly updated start date in blue the next time they open the headcount task.

### Headcount (Actual) for 3 & 4 year olds

Anu Providers / Anu service / Summer Term 2019 (01 Apr 19 - 31 Aug 19)

You can edit and re-submit this information at any time until the deadline of 30 September 2019

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

|                                     | Forename | Surname | Funding                  | Date of birth | Funding Age | Start Date | End Date |
|-------------------------------------|----------|---------|--------------------------|---------------|-------------|------------|----------|
| <input checked="" type="checkbox"/> |          |         | <input type="checkbox"/> | 27/08/2015    | 3           | 25/08/2019 |          |

This change allows the Providers to claim the correct number of hours recorded for a child in accordance with the Start Dates being entered.



## Editing a Task after the Deadline

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

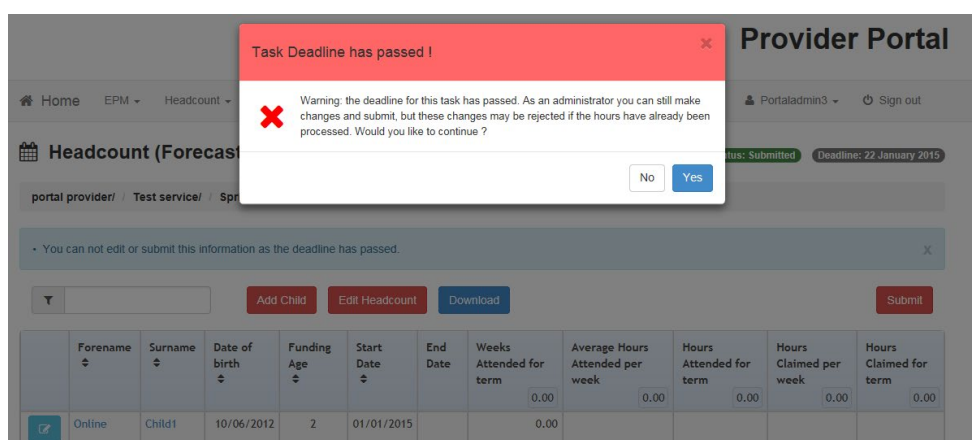
1. View a list of tasks and select the required task. For more information, see [Viewing Issued Tasks](#) on page 39.
2. Click the provider link to display the **Service Details** page.
3. Click the **View Task** button to display the headcount grid.

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

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

A warning message is displayed.

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



## Removal of a Child from a Headcount Task

In 3.67 release changes were made where, when a Child is removed from funded service or school history the child will also be removed from an associated Headcount task on Provider portal. The following applies in removing a child's headcount task.

- **Removing school history**

A user should only be able to delete a school history record if there are no entries for the child for any other service for the provider which occur in the same time period.

**NOTE** : This is applicable for both Funded and non-Funded Services.

If hours are not recorded against a child provider against any of the service (a provider can have multiple services) (for funded and non-funded services), during the time period covered by the school history, then school history for the child can be deleted.

- **Funded Service**

When the child is removed from the Funded Service grid, the child should also get removed from the Head Count task from the same term and service, when next time the head count task is opened.



# 06 | Sending Messages

## Introduction

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

## Composing a New Message

**NOTE:** Messages can only be sent to active services.

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

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

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

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

## Sending Messages

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

The screenshot shows the 'Compose New Message' dialog. At the top, there's a 'To' field containing three selected services: 'EYProvider - EYService', 'EYProvider1 - EYService1', and 'EYProvider3 - EYService3'. Below it is a 'Use Template' dropdown menu with the text 'Please Select a Template'. There's an 'Attachment' field with a 'Browse...' button and a 'Clear' button. The 'Subject' field is empty. The 'Message' field is a large text area with a rich text editor toolbar. At the bottom, there are 'Cancel' and 'Send' buttons.

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

## Viewing Sent Messages

The screenshot shows the 'Sent Messages' page. At the top, there's a 'Compose Message' button. Below it, there's a '12 Message(s)' indicator. The main content is a table with the following data:

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

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

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

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

## Viewing Recipients

The screenshot shows the 'Recipients' page. At the top, there's a 'Back' button. Below it, there's a table with the following data:

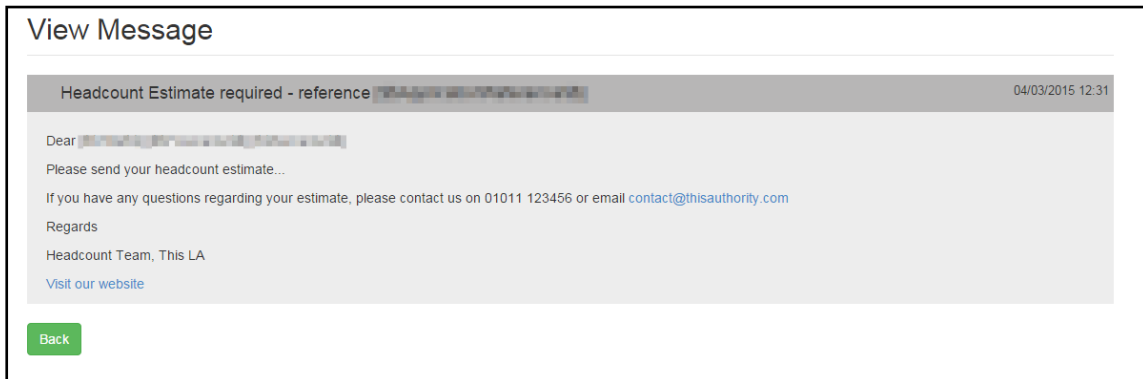
| Subject   | Date Sent           | Sender  |
|---|---------------------|---------|
| Application for funded early education for a 2 year old child - reference TYF-1410-F1SR6YF2 | 01/10/2014 11:37:15 | Fundmgr |

Below the table, there's a '1 Recipient(s)' indicator. The main content is a table with the following data:

| Provider             | Service        | Status                                     |
|----------------------|----------------|--|
| Allison Heston-Brown | Sessional Care | <input checked="" type="checkbox"/> Unread |

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

### Viewing a Message



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

# 07 | Managing Imports

## Introduction

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

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

## Updating the Scheduled Import

To change the scheduled time of the import:

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

The screenshot shows the 'Manage Headcount Imports' page. At the top, it says 'Schedule Import of Headcount Submissions'. Below this, there is a field for 'Import headcount submissions daily at' set to '08:48'. There is a 'Task Enabled' toggle switch currently set to 'ON'. A 'Save' button is located below the toggle. Underneath, there is an 'Import History' section with a sub-header '8 Imports(s)'. Below this is a table with the following data:

|                                  | Start time           | End time             | Status     | Submission Import Status |
|----------------------------------|----------------------|----------------------|------------|--------------------------|
| <a href="#">View Submissions</a> | 3/3/2015 6:58:05 AM  | 3/3/2015 6:58:08 AM  | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/3/2015 6:20:05 AM  | 3/3/2015 6:20:05 AM  | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/3/2015 5:28:05 AM  | 3/3/2015 5:28:06 AM  | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/2/2015 2:10:05 PM  | 3/2/2015 2:10:06 PM  | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/2/2015 11:14:05 AM | 3/2/2015 11:14:07 AM | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/2/2015 10:50:05 AM | 3/2/2015 10:50:07 AM | Successful | 0 3                      |
| <a href="#">View Submissions</a> | 3/2/2015 9:36:05 AM  | 3/2/2015 9:36:07 AM  | Successful | 0 1                      |
| <a href="#">View Submissions</a> | 3/2/2015 9:02:05 AM  | 3/2/2015 9:02:06 AM  | Successful | 0 1                      |

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

## Enabling/Disabling the Scheduled Import

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

## Viewing Previous Imports

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

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

### Import Details

---

1 Submission(s)

|                                     | Provider | Service | Submission Type | Submission Date     | Children Status   | Stretched offer association |
|-------------------------------------|----------|---------|-----------------|---------------------|---|-----------------------------|
| <a href="#">View submitted data</a> |          |         | Actual          | 28/01/2016 13:35:57 | <span style="color: red;">0</span> <span style="color: green;">6</span> | 0                           |

Back

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

### Submission Import Details

| Provider | Service | Submission Type | Submission Date     | Children Status   | Stretched offer association |
|----------|---------|-----------------|---------------------|---|-----------------------------|
|          |         | Actual          | 28/01/2016 13:35:57 | <span style="color: red;">0</span> <span style="color: green;">6</span> | 0                           |

Children

| Forename | Surname | Gender | Date of birth | Status Date         | Status   | Status Description    |
|----------|---------|--------|---------------|---------------------|--|-----------------------|
| Vicki    |         | Female | 19/06/2010    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |
| Vicki    |         | Female | 19/06/2010    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |
| Marthas  |         | Female | 08/04/2011    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |
| Marthas  |         | Female | 08/04/2011    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |
| T1       | T1      | Male   | 01/01/2010    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |
| T1       | T1      | Male   | 01/01/2010    | 28/01/2016 13:36:37 | <span style="background-color: #28a745; color: white; padding: 2px 5px; border-radius: 3px;">Imported</span> | Imported Successfully |

Back View Task

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





# 08 | Managing Reports

## Introduction

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

## Generating Reports

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

**NOTES:** Reports can only be generated for active services.

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

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

**Report Manager**

2 Records Found

| Description                       | Report Name                       | Created Date     | Run Progress | Action       | Sent | Visible |
|-----------------------------------|-----------------------------------|------------------|--------------|--------------|------|---------|
| Business Improvement (BIM) Report | Business Improvement (BIM) Report | 13/09/2013 15:12 | 0 0 8        | Manage, Hide | ✓    | ✓       |
| Progression for Children          | Progression for Children          | 12/09/2013 14:09 | 0 0 14       | Manage, Hide | ✓    | ✓       |

Run Report For Services

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

**Run Report For Services**

Description \*

Report Choice \*

To \*

0 Service(s)

Cancel Start Generating Reports

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

## Managing Reports

**Report Recipient**

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

**Search Results**  
92 Service(s)

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

**Selected Services**  
0 Service(s)

There are no selected services.

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

**Run Report For Services**

Description

Report Choice

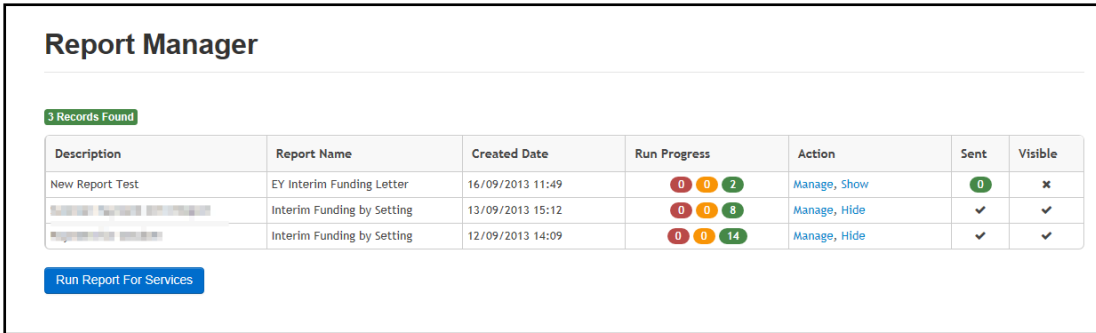
To

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

**Report Submitted**

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

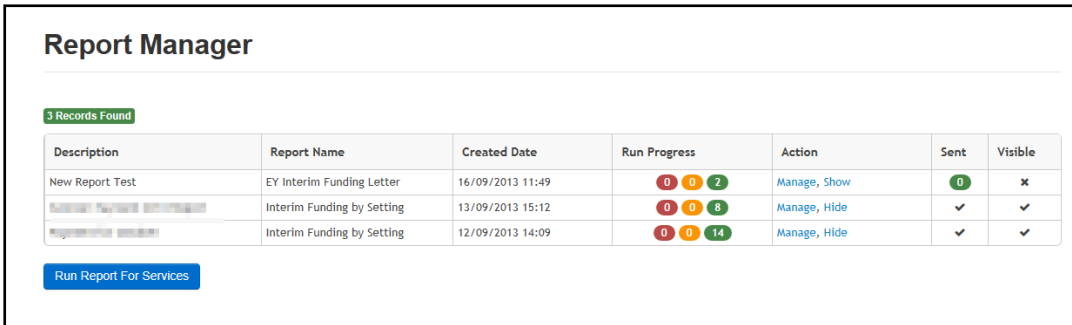
- Click the **OK** button to display the **Report Manager** page.



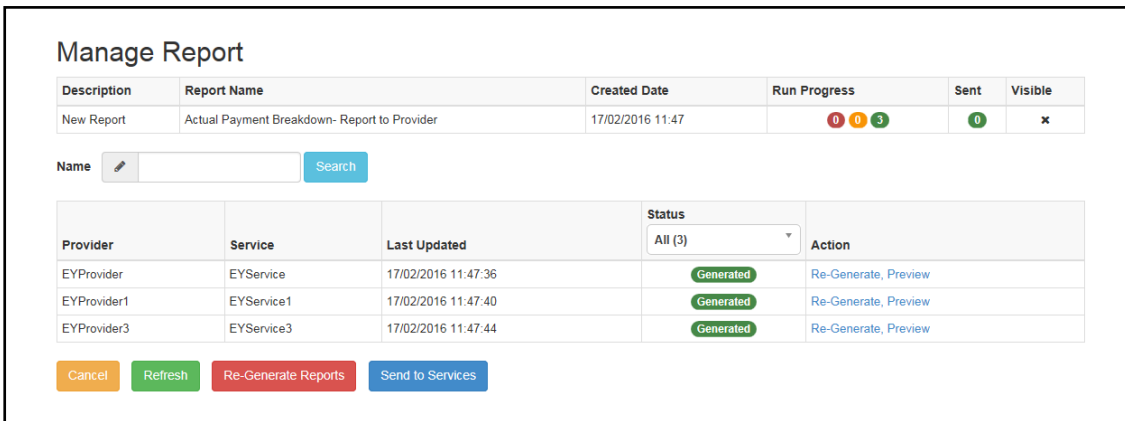
The **Report Manager** page enables you to see the **Run Progress** of a report, whether a report has been **sent** to the provider and to hide a report, if required. It also enables you to manage reports that have been generated.

## Sending a Report

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



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



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

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

**Payment History**

01 Marks - Full Day Care

5 Report(s)

| Report Date | Description               | Actions                     |
|-------------|---------------------------|-----------------------------|
| 15/10/2013  | Interim funding of report | <a href="#">View Report</a> |
| 15/10/2013  | My report for learning    | <a href="#">View Report</a> |
| 15/10/2013  | all                       | <a href="#">View Report</a> |
| 15/10/2013  | Interim funding           | <a href="#">View Report</a> |
| 15/10/2013  | Interim funding           | Not available               |

[Back](#)

**More Information:**

[Viewing Payment History](#) on page 53

## Managing Generated Reports

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

**Manage Report**

| Description                | Report Name                | Created Date     | Run Progress  | Sent | Visible |
|----------------------------|----------------------------|------------------|---|------|---------|
| interim funding by setting | Interim Funding by Setting | 01/10/2013 07:56 | <span style="color:red">0</span> <span style="color:orange">0</span> <span style="color:green">1</span> | ✓    | ✓       |

Name  [Search](#)

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

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

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

### Re-generating a report

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

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

### Previewing a report

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

## Viewing Payment History

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

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

**Payment History - Select service**

Provider:

Funded Service:  Check End Lines School - Full Day Care

[Select](#)

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

A list of reports sent to this service is displayed.

**View Payment History**

Check End Lines School - Full Day Care

2 Reports found

| Report Date | Description                | Actions                     |
|-------------|----------------------------|-----------------------------|
| 13/09/2013  | Summer Payment 2013 Report | <a href="#">View Report</a> |
| 12/09/2013  | Payment for October        | <a href="#">View Report</a> |

[Back](#)

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

# 09 | Managing Service Groups

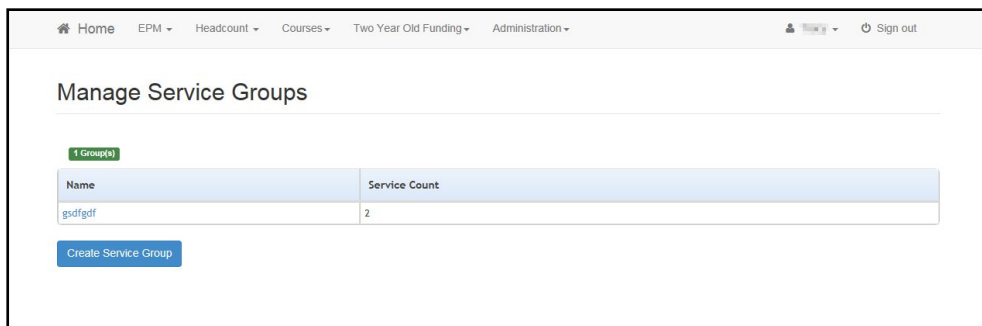
## Introduction

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

## Creating a Service Group

To create a new service group:

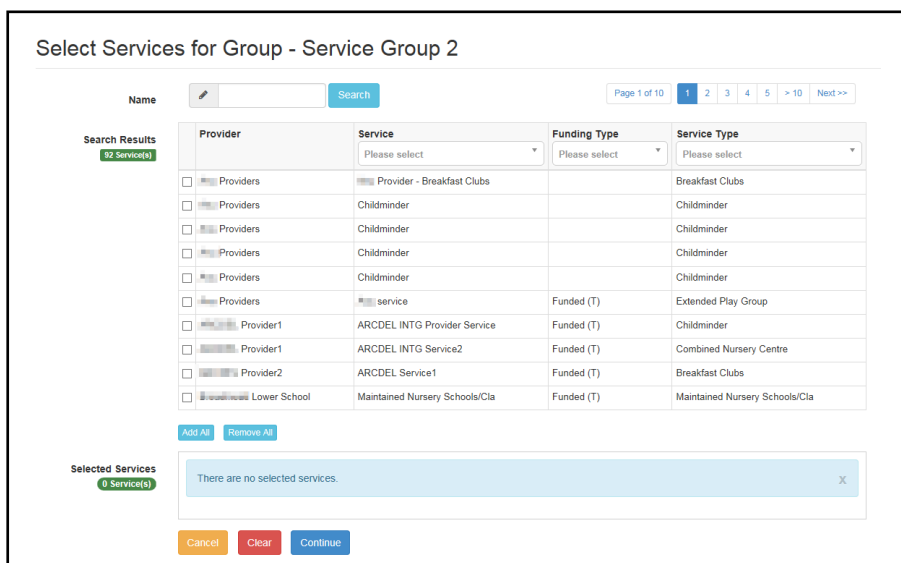
1. Select **Service Groups** from the **Headcount | Administrator** menu to display the **Manage Service Groups** page.



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



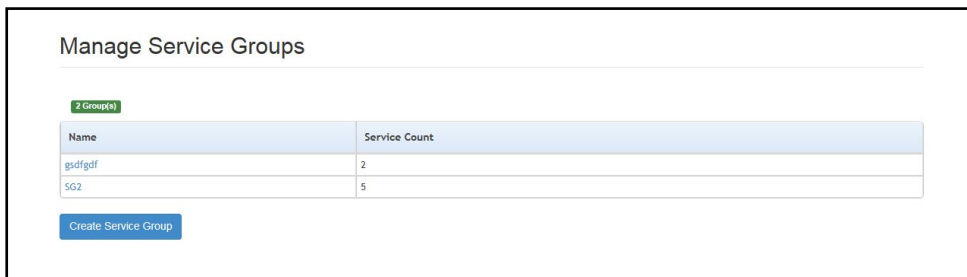
3. Enter a **Name**.
4. Click the browse button to display the **Select Services for Group** page.



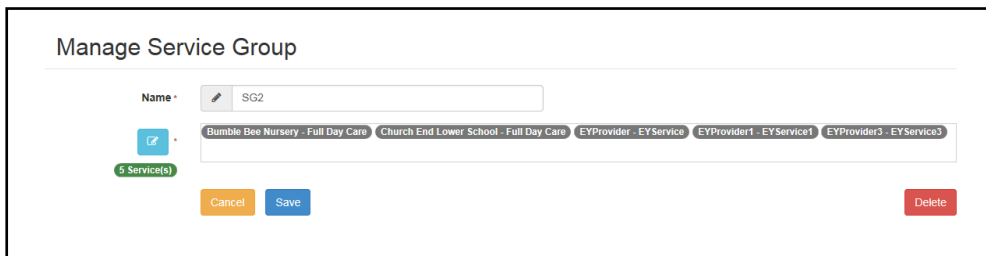
5. If required, to filter the list:
  - a. Enter one or more characters of the **Name** and click the **Search** button to display matching services.
  - b. Select a **Service**, **Funding Type** or **Service Type** from the drop-downs.
6. Select one or more check boxes adjacent to the required services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

## Displaying a Service Group

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



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



## Updating a Service Group

To add new services or remove services from a group:

1. Display the required service group. For more information, see [Displaying a Service Group](#) on page 55.
2. Click the browse button adjacent to the list of services to display the **Select Services for Group** page.

## Managing Service Groups

Select Services for Group - Service Group XYZ

Name  Search

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| Provider  | Service                        | Funding Type   | Service Type                   |
|---|--------------------------------|----------------|--------------------------------|
| <input type="checkbox"/> Provider               | Service1                       | Funded (T)     | Childminder                    |
| <input type="checkbox"/> Lower School           | Maintained Nursery Schools/Cla | Funded (T)     | Maintained Nursery Schools/Cla |
| <input type="checkbox"/> Nursery                | Full Day Care                  | Not Funded (F) | Full Day Care                  |
| <input type="checkbox"/> End Lower School       | Full Day Care                  | Funded (T)     | Full Day Care                  |
| <input type="checkbox"/> dfsdfsdf               |                                | Funded (T)     | Childminder                    |
| <input type="checkbox"/> sss                    |                                | Funded (T)     | Childminder                    |
| <input checked="" type="checkbox"/> EYProvider  | EYService                      | Funded (T)     | Childminder                    |
| <input checked="" type="checkbox"/> EYProvider1 | EYService1                     | Funded (T)     | Early Excellence Centre        |
| <input checked="" type="checkbox"/> EYProvider3 | EYService3                     | Funded (T)     | Wraparound Care                |
| <input type="checkbox"/> . Louise               | Childminder                    | Not Funded (F) | Childminder                    |

Add All Remove All

Selected Services 3 Service(s)

EYProvider - EYService EYProvider1 - EYService1 EYProvider3 - EYService3

Cancel Clear Continue

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

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

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

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

## Deleting a Service Group

1. Display the required service group. For more information, see [Displaying a Service Group](#) on page 55.

Manage Service Group

Name  SG2

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

5 Service(s)

Cancel Save Delete

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



# 10 | Managing Headcount Configuration

## Headcount Configuration Page

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

**Headcount Configuration**

Add/Edit Child

| Configuration Key                                  | Configuration Value                    |   |
|--|--|---|
| Collect Carer Information                          | <input type="checkbox"/> OFF           |   |
| Collect Child details which are missing?           | No action required                     | ▼ |
| Allow the middle name of the child to be collected | <input type="checkbox"/> OFF           |   |
| Allow the SEND status of the child to be collected | <input type="checkbox"/> OFF           |   |
| Allow Providers To Override Funding Status         | <input checked="" type="checkbox"/> ON |   |

Headcount Grid Configuration

| Configuration Key  | Configuration Value                    |  |
|--|--|--|
| Always allow pay hours to be claimed regardless of whether the child is funded.  | <input type="checkbox"/> OFF           |  |
| Allow Funded Hours to be recorded for New 2 Year Olds  | <input checked="" type="checkbox"/> ON |  |
| Combine Universal and Extended Pay Hours Columns.  | <input type="checkbox"/> OFF           |  |
| Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated). | <input type="checkbox"/> OFF           |  |
| Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).                  | <input type="checkbox"/> OFF           |  |

Submission Grid Columns

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

Edit Grid Columns

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

**Note:** The graphic above shows the new configuration keys that were introduced in previous release.

## Displaying the Add/Edit Child panel

**Add/Edit Child**

| Configuration Key                                  | Configuration Value                    |   |
|--|--|---|
| Collect Carer Information                          | <input checked="" type="checkbox"/> ON |   |
| Collect Child details which are missing?           | No action required                     | ▼ |
| Allow the middle name of the child to be collected | <input checked="" type="checkbox"/> ON |   |
| Allow the SEND status of the child to be collected | <input checked="" type="checkbox"/> ON |   |
| Allow Providers To Override Funding Status         | <input checked="" type="checkbox"/> ON |   |

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

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

## Managing Headcount Configuration

- Providers Override Funding Status.

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

## Updating Add/Edit Child Details

To update the **Configuration Value**:

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

| Headcount Configuration                            |  |   |
|--|--|---|
| Add/Edit Child                                     |  |   |
| Configuration Key                                  | Configuration Value                    | ▲ |
| Collect Carer Information                          | <input type="checkbox"/> OFF           |   |
| Collect Child details which are missing?           | No action required ▼                   |   |
| Allow the middle name of the child to be collected | <input type="checkbox"/> OFF           |   |
| Allow the SEND status of the child to be collected | <input type="checkbox"/> OFF           |   |
| Allow Providers To Override Funding Status         | <input checked="" type="checkbox"/> ON |   |

**NOTES:** If **Collect Carer Information** is set to **On**, the headcount cannot be submitted unless carer information is recorded for each 3 or 4 year old child at the setting, or the **Decline to provide** radio button is selected for that child. For more information, see [Recording Carer Details](#) on page 26. If the middle name or SEND status is collected via the portal, they are passed through B2B with the other details of the child.

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

## Notification alert for missing data

Local authorities can set the options in Headcount Configuration on how missing child information should be processed by providers by using the 3 options below.

- **No action required**
- **Warning**
- **Required**

| Headcount Configuration                            |   |   |
|--|---|---|
| Add/Edit Child                                     |   |   |
| Configuration Key                                  | Configuration Value   | ▲ |
| Collect Carer Information                          | <input checked="" type="checkbox"/> ON  |   |
| Collect Child details which are missing?           | <input checked="" type="checkbox"/> No action required<br><input type="checkbox"/> Warn, but don't prevent submission<br><input type="checkbox"/> Required before submission is allowed |   |
| Allow the middle name of the child to be collected |   |   |
| Allow the SEND status of the child to be collected | <input checked="" type="checkbox"/> ON  |   |
| Allow Providers To Override Funding Status         | <input checked="" type="checkbox"/> ON  |   |

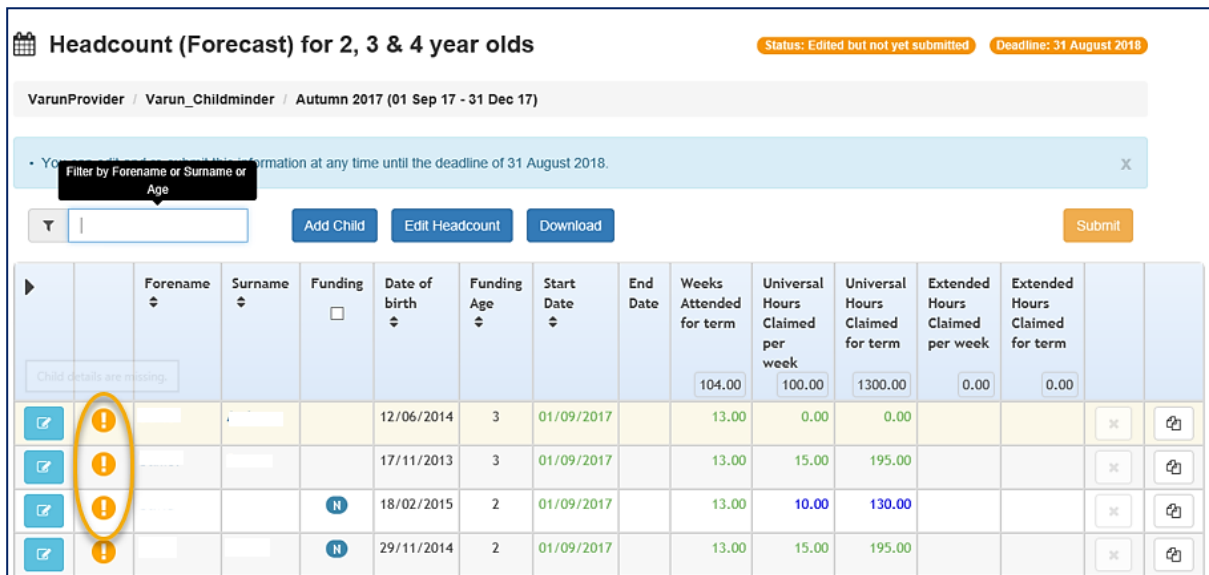
The configuration value and their meaning are as follows:

- **No action required:**

There will be no indicator displayed in the Headcount (Forecast) screen. The Submit button and tooltip will be shown as Blue.

- **Warning but don't prevent submission:**

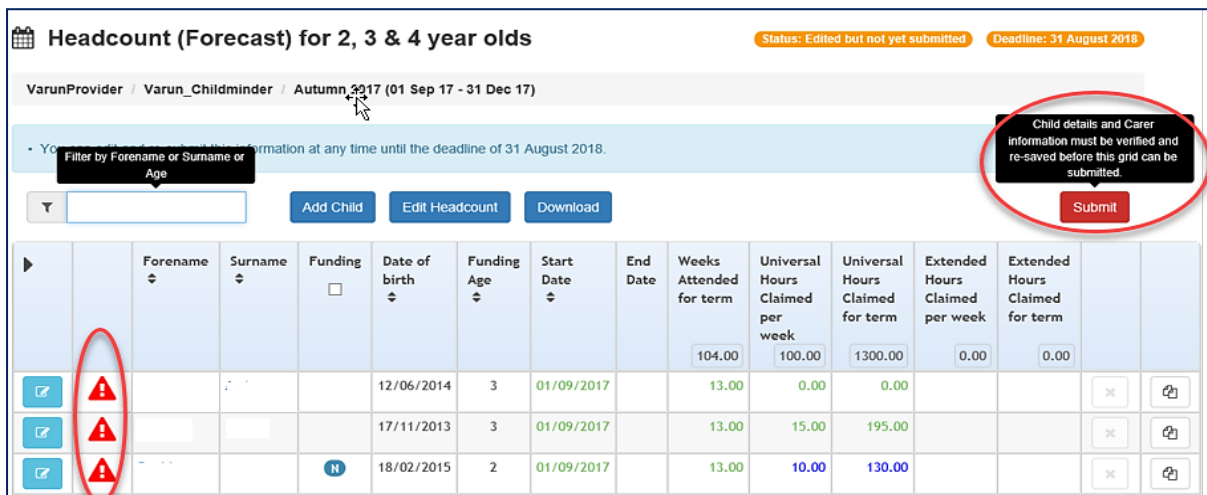
The indicator of an Amber circle will appear in the Headcount (Forecast) screen.



A tooltip will be displayed for both the exclamation mark and the Submit button, indicating that although the child details are missing submitting is still allowed.

- **Required before submission is allowed:**

The indicator of a Red triangle will appear in the Headcount (Forecast) screen as shown in graphic below.



A tooltip will be displayed for both the Red Triangle in the grid and the Submit button, indicating that either Carer or Child details is required before submitting.

## Changes to Headcount Configuration for 2 year old funding

New configuration settings to allow more flexibility and control over when 2 year olds can have funded hours claimed against them and to allow LAs to determine whether providers can amend the Funded Status of 2-year olds.

## Displaying the Headcount Grid Configuration

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

| Configuration Key  | Configuration Value                    | ▲ |
|--|--|---|
| Always allow pay hours to be claimed regardless of whether the child is funded.  | <input type="checkbox"/> OFF           |   |
| Allow Funded Hours to be recorded for New 2 Year Olds  | <input checked="" type="checkbox"/> ON |   |
| Combine Universal and Extended Pay Hours Columns.  | <input type="checkbox"/> OFF           |   |
| Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated). | <input checked="" type="checkbox"/> ON |   |
| Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).                  | <input checked="" type="checkbox"/> ON |   |

- If **Allow Pay Hours to be claimed regardless of whether child is funded** is set to **On**, all values on the headcount grid are enabled regardless of the child's **Funded Status**.
- If **Combine Universal and Extended Pay Hours Columns** is set to **On** (default), universal and extended columns are combined on the headcount grid. If it is set to **Off**, providers can enter universal and extended hours separately.
- If **Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 **Funded Service** screen when the headcount task is created.
- If **Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated)** is set to **On**, this information is completed on the headcount grid for all services that have this information entered on their v4 **Funded Service** screen when the headcount task is created.

## Updating Headcount Grid Configuration

| Configuration Key  | Configuration Value                    | ▲ |
|--|--|---|
| Always allow pay hours to be claimed regardless of whether the child is funded.  | <input type="checkbox"/> OFF           |   |
| Allow Funded Hours to be recorded for New 2 Year Olds  | <input checked="" type="checkbox"/> ON |   |
| Combine Universal and Extended Pay Hours Columns.  | <input type="checkbox"/> OFF           |   |
| Prepopulate the 'Weeks Attended for term' column on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated). | <input checked="" type="checkbox"/> ON |   |
| Prepopulate the 'Hours' columns on the Headcount grid (applicable to Forecast and Actual tasks. Amendment tasks are always prepopulated).                  | <input checked="" type="checkbox"/> ON |   |

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

To update the **Configuration Value**:

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

## Funding Hours in Headcount Grid Configuration

The following rules are applied when setting the funding hours.

### Configuration 1:

If **Always allow pay hours to be claimed regardless of whether the child is funded** is set to OFF and **Allow Funded Hours to be recorded for New 2 Year Olds** is set to OFF, then the following will occur:

| Child Description  | Funding Status | Can enter Universal Hours |
|--|----------------|---------------------------|
| 2 Year old added to the grid by the provider   | N              | No                        |
| 2 Year old added to the grid by the system who is TYOF Eligible  | 2              | Yes                       |
| 2 Year old added to the grid by the system who is not TYOF Eligible  | N              | No                        |
| 3 or 4 Year old added to the grid by the provider  | Blank          | Yes                       |
| 3 or 4 Year old added to the grid by the system  | Blank          | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '. Allow Hours to be claimed'       | Tick           | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '..Never allow Hours to be claimed' | Cross          | No                        |

### Configuration 2:

If **Always allow pay hours to be claimed regardless of whether the child is funded** is set to ON and **Allow Funded Hours to be recorded for New 2 Year Olds** is set to Any, then the following will occur:

| Child Description  | Funding Status | Can enter Universal Hours |
|--|----------------|---------------------------|
| 2 Year old added to the grid by the provider   | Blank          | Yes                       |
| 2 Year old added to the grid by the system who is TYOF Eligible  | 2              | Yes                       |
| 2 Year old added to the grid by the system who is not TYOF Eligible  | Blank          | Yes                       |
| 3 or 4 Year old added to the grid by the provider  | Blank          | Yes                       |
| 3 or 4 Year old added to the grid by the system  | Blank          | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '..Allow Hours to be claimed'       | Tick           | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '..Never allow Hours to be claimed' | Cross          | No                        |

**Configuration 3:**

If **Always allow pay hours to be claimed regardless of whether the child is funded** is set to OFF and **Allow Funded Hours to be recorded for New 2 Year Olds** is set to ON, then the following will occur:

| Child Description  | Funding Status | Can enter Universal Hours |
|--|----------------|---------------------------|
| 2 Year old added to the grid by the provider   | Blank          | Yes                       |
| 2 Year old added to the grid by the system who is TYOF Eligible  | 2              | Yes                       |
| 2 Year old added to the grid by the system who is not TYOF Eligible  | N              | No                        |
| 3 or 4 Year old added to the grid by the provider  | Blank          | Yes                       |
| 3 or 4 Year old added to the grid by the system  | Blank          | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '..Allow Hours to be claimed'       | Tick           | Yes                       |
| 2 Year old added to the grid by the provider the admin has set the funding status to '..Never allow Hours to be claimed' | Cross          | No                        |

- In the **Child Details** screen a new option has been added to **Funded Status**; this enables local authorities to grant providers the ability to override the funding status should they wish to do so. See graphic below.

The screenshot shows a form with several fields: Date of birth (dd/mm/yyyy), Ethnicity, First Language, SEND Status, Funded Status, and Eligibility Code. The Funded Status dropdown menu is open, showing three options: 'Let the system decide.', 'Force the system to always allow hours to be claimed.', and 'Force the system to never allow hours to be claimed.' The 'Force the system to always allow hours to be claimed.' option is highlighted in blue.

This works in conjunction with the Funding setting in Headcount configuration.

## Displaying Submission Grid Columns

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

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

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

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

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

## Updating Submission Grid Columns

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

To update the grid:

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

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

For more information about submitting the headcount, see [Executing a Task](#) on page 21.

## Displaying Edit Grid Columns

The **Edit Grid Columns** panel is used to specify which columns are displayed on the **Edit Headcount** page. For more information, see [Editing the Headcount Information](#) on page 29.

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

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

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

## Managing Headcount Configuration

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

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

## Updating Edit Grid Columns

The **Edit Grid Columns** panel is used to specify which columns are displayed on the **Edit Headcount** page. For more information, see [Editing the Headcount Information](#) on page 29.

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

To update the grid:

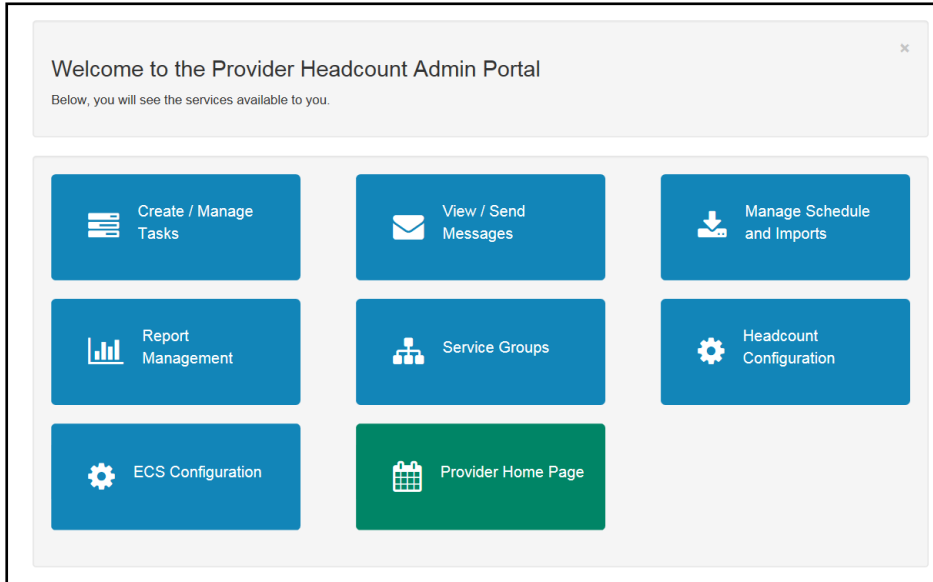
1. Select **Headcount Configuration** from the **Headcount | Administrator** menu to display the **Headcount Configuration** page.
2. Deselect the check boxes for columns that you do not want to display and ensure that check boxes are selected for columns that you do want to display.
3. Click the **Save**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



# 11 | Configuring ECS

## Introduction

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



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

## Configuring the Link to the ECS

### ECS Configuration

**NOTE:** When using a live environment, the **ECS Environment** must always be **Live**. If using in a test environment, the **ECS Environment** must be **Sandpit**.

### ECS Settings

#### ECS Configuration

Configure the link to the DWP Eligibility Checking Service

**ECS Settings**

**ECS Environment**

**ECS Local Authority**

**ECS Username**

**ECS Password**  
[Update ECS Password](#)

**ECS System Status**  
[Test](#)

[Save](#)

## Configuring ECS

1. From the **ECS Environment** drop-down list select Live.
2. Enter your **ECS Local Authority** value.
3. Enter your **ECS Username**.
4. Click the **Save** button.
5. Click the **Update ECS Password** link to display the password fields.
6. Enter your ECS Account password in both fields.
7. Click the **Save** button.
8. If you have changed the **ECS Environment** value, perform an IIS reset on the Provider Portal web server.

**NOTE:** Changing the **ECS Environment** affects both Early Years Pupil Premium and 30 Hours Entitlement.

## ECS Override Settings

If it is necessary to override the default address for connection to the DfE Eligibility Checking Service (ECS), complete the following:

1. Enter the following URL into the **ECS Service URI Override** field.  
<https://ecs.education.gov.uk/fsm.laweb/service/20170701/OnlineQueryService.svc>

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

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

# 12 | Site Setup

## Introduction

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

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

## Managing Message Templates

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

To create a new template:

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

### **Site Setup**

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

# Index

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