oneeducation

One Early Years DAF Provider Portal Handbook

last updated for the Summer 2020 release 3.72

Handbook

CAPITA

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One Early Years DAF Provider Portal Handbook/Summer 2020 (3.72)/13-07-2020

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Contents

01 | Document Change Control

Date	Release	Description
Summer 2020	3.72	**DAF Application** A '**Show Eligible Children'** check box has been added to **DAF Application** screen. The check box is ticked by default to display a list of eligible children for the selected Provider. *For more information see Creating a New Application page 23 item 2.c*
Spring 2020	3.71	**Add Child – Address** Building Name has been added to the Address section in 'Disability Access Funding Application' when entering a Childs detail. A Validation check has been implemented against each field below : • House Number • House Name • Building Name A message will appear against each field if all 3 are left blank. *For more information see Creating a New Application Page 25*
Spring 2018	3.65	When adding a new child for a DAF application, if the name is longer than the field allows, the child needs to be added by the Local Authority via the v4 Client and a message is displayed. The message can be configured in the Provider portal via **Administration	Text Customisation**. *For more information, see Creating a New Application on page 23.*

02 | **Introduction to the Disability Access Fund Portal**

Overview

The Department for Education (DfE) introduced the Disability Access Fund (DAF) in April 2017 to enable Early Years settings to provide increased support for children with disabilities.

Three and four year-old children are eligible for the Disability Access Fund if they meet the following criteria:

- The child is in receipt of the child disability living allowance (DLA).

- The child accesses the funded entitlement at the Early Years provider.

NOTE: The three year-old funding period starts on the first day of the payment period following the child's third birthday. The three year-old funding period then includes the following two payment periods.

Providers that take three and four year-old children who are eligible for the Disability Access Fund are entitled to receive an annual payment of £615 per child. The payment is made to a single Early Years setting nominated by the child's parents or carers. The parent or carer needs to complete a DAF declaration form each year and confirm which provider receives the payment.

The parent or carer submits the completed DAF declaration form to the provider so that they can apply for the Disability Access Fund.

If the Local Authority has a licence for the Provider Portal Headcount, Early Years providers can use the Provider portal to make claims for DAF and the Local Authority DAF manager can use the Provider portal to approve or reject DAF applications.

The Student Details record in the One v4 Client is updated with details of the DAF approval.

Local Authorities that are not using Provider Portal Headcount can manually enter details of approved DAF applications in the student details record.

The Local Authority financial approver can generate and authorise DAF payments to the provider using the One v4 Client.

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

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

All documents are available on the One Publications website (www.onepublications.com).

Using this Handbook

This handbook is intended for the Early Years team and the DAF administrator at the Local Authority.

The first chapter provides an overview of the Disability Access Fund and the administration functions that are common to all Provider portal modules.

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

The third chapter describes the configuration of the DAF application in the Provider portal.

The fourth chapter provides an overview of the processes performed by Early Years providers to create a DAF application.

The fifth chapter describes the process for approving or rejecting a DAF application.

The sixth chapter describes the process in the v4 Client to update the student details record with information about approved DAF applications.

The seventh chapter describes the process in the v4 Client to generate and authorise DAF payments.

Provider Portal Home Page

Displaying the Home Page

When a user logs into the Provider portal, if the Local Authority has the Headcount licence and the user is a member of a user group with the required permissions, the **Disability Access Fund** tile and menu route are displayed on the **Provider Portal** home page as shown in the following graphic.
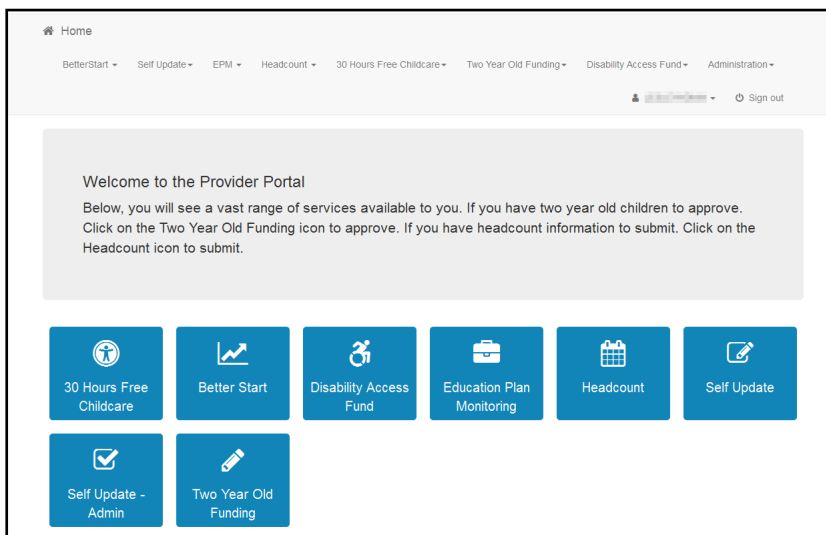
For information about the required permissions, see <u>Assigning Permissions</u> on page *14*.

Portal Administration

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

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

The **Disability Access Fund | Administrator** menu route enables the Local Authority DAF administrator to configure the DAF application. For more information, see

Setting the Language in Chrome

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

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

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

Common Functionality

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

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

Customising Text

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

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

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

2. From the **Choose a text category** drop-down, select the category of text to be configured.

3. Alternatively, enter search criteria, click the **Search** button and select the text.

4. Select the **Default** or **Welsh** tab to determine the text language.

5. Click the **Add** button.
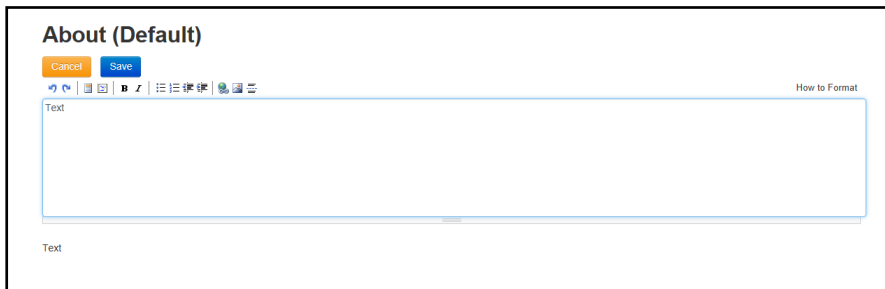
6. Enter required text in the formatting panel. Formatting buttons are provided above the panel.

7. The formatted text is displayed beneath.

8. Click the **Save** button.

Editing Customised Text

1. Select **Administration | Text Customisation** to display the **Text Customisation** page.
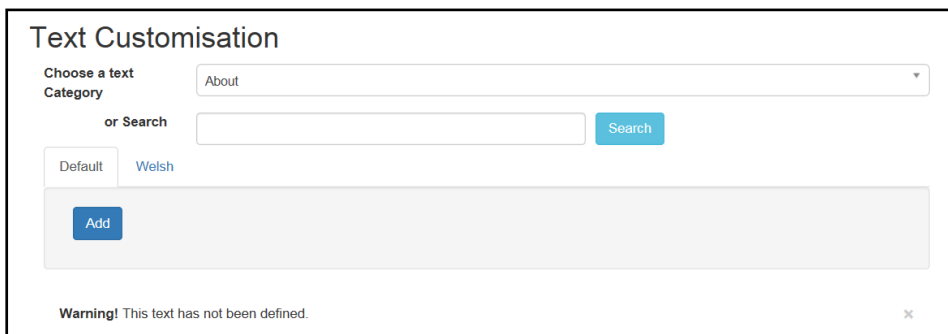
2. From the **Choose a text category** drop-down, select the category of text to be configured.

3. Select the **Default** or **Welsh** tab to determine the text language.

4. Click the **Edit** button.
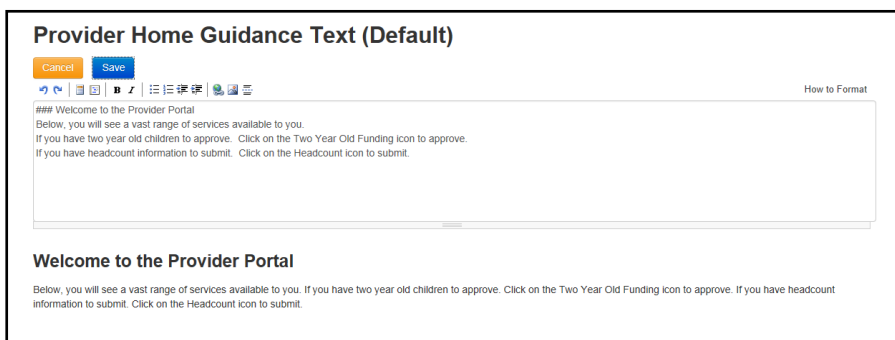
5. Make the required changes to the text displayed in the formatting panel. Formatting buttons are provided above the panel.

6. The amended text is displayed beneath.

7. Click the **Save** button.

Configuring the Provider Portal

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

2. For each **Configuration Key**, change the **Configuration Value,** if required:

3. If required, set **Include the admin on emails sent** to **On**.

4. Enter an email address for: **The from email address used when messages are sent**.

5. Enter a number for: **When sending lots of emails batch them up into groups of this size**.

6. Enter the number of **Maximum messages to show on the home page**.

7. If required, set **Is second factor authentication enabled** to **On**.

8. If required, set **Is Mini Profile enabled** to **On**.

9. If required, enter **The Portal url**.

10. If required, enter the **Google Analytics tracking id**.

11. If required, enter the **Account lockout time span in minutes**.

12. If required, enter the **Maximum failed Verification Code attempts**.

13. If required, enter the **Pop-up message expiry time in seconds**.

14. Click the **Save** button.

> **More Information:**
>
> For more information regarding portal configuration, refer to the *Technical Guide: **Deploying and Configuring the One Provider Self Service Portal for Local Authorities***, which is available on *One Publications*

Using 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

To make changes to 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.*

In the Provider portal there are two types of DAF user, Provider users and Local Authority administrators. Provider users can apply for the Disability Access Fund. LA administrators can manage access to providers, configure the portal, approve or reject DAF applications and perform portal administration. Using the One v4 Client, Early Years financial approvers can authorise DAF payments to providers.

User creation is a three stage process.

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

Secondly, the user must be assigned to the correct security group in the v4 Client. Permissions are assigned to a security group in the v4 Client via **Tools | Permissions | User Group Processes**. For more information, see Assigning Permissions on page *14*.

Finally, after a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal via the **Manage Access** area.
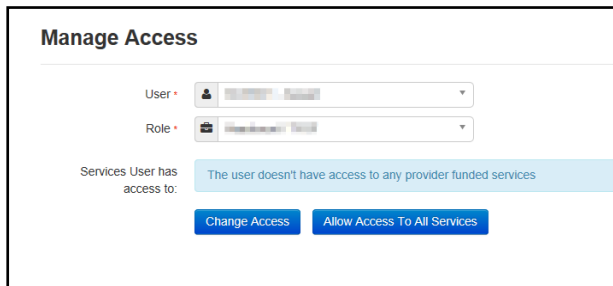
> **More Information:** *Managing Users in v4* chapter in the *One System – Managing Users, Groups & Permissions* handbook available on the *One Publications* website.

Creating a Portal User Account

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

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Account**.

2. Send the log in details (user name and initial password) to the new user via email.

Activating a Portal User Account

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

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

1. Click on the unique link contained in the email.

2. Enter their user name and original password.

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

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

Assigning Permissions

To access the Disability Access Fund on the Provider portal a user must belong to a user group with permission for one or more of the following business processes:

- Disability Access Fund User
- Disability Access Fund Administrator
- Disability Access Fund Manager.

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

Permission to Apply for DAF

To apply for the Disability Access Fund, the permission required is **Read-Write** for the business process **Disability Access Fund User** under the **Provider Portal** main business process.

Permission to Configure DAF

To configure the DAF portal via the configuration page, the permission required is **Read-Write** for the business process **Disability Access Fund Administrator** under the **Provider Portal** main business process.

Permission to Manage Applications

To manage applications for the Disability Access Fund, the permission required is **Read-Write** for the business process **Disability Access Funding Manager** under the **Provider Portal** main business process.
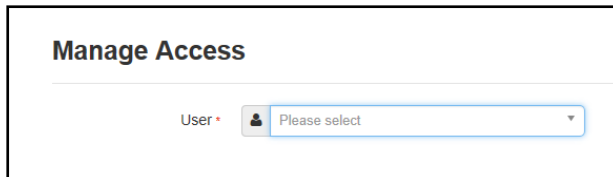
Managing User Access

Granting Access to Providers and Services

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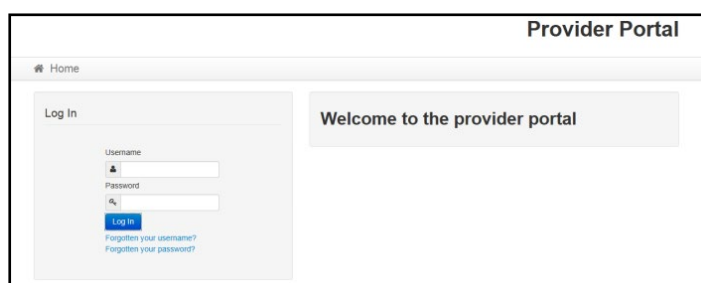
To update access for the selected user:

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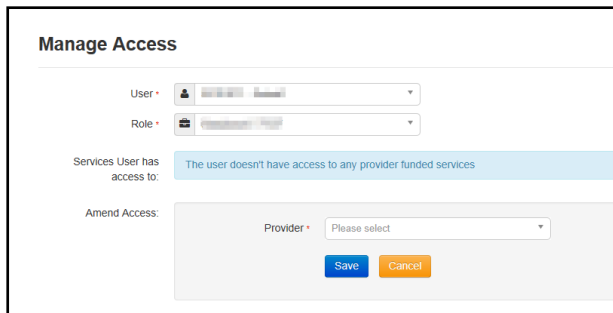
2. Select a **User** to display their **Role** and a list of services to which they have access.

3. Click the **Allow Access to All Services** button or click the **Change Access** button to display the **Amend Access** panel.
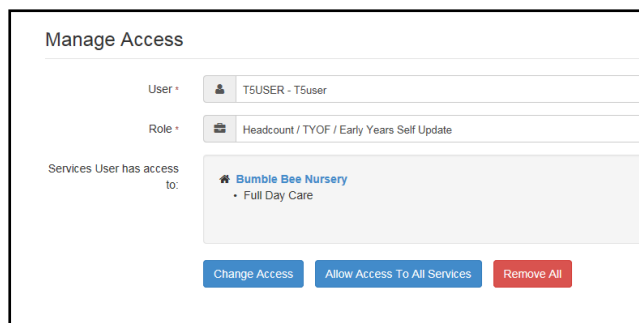
4. Select a **Provider from the drop-down list** to display their services.

5. Select one or more services.

6. Click the **Save** button.

Removing Access from a User

To remove a user's access to all services:

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

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

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

Logging into the Portal

A user with an active user account can log into the portal.
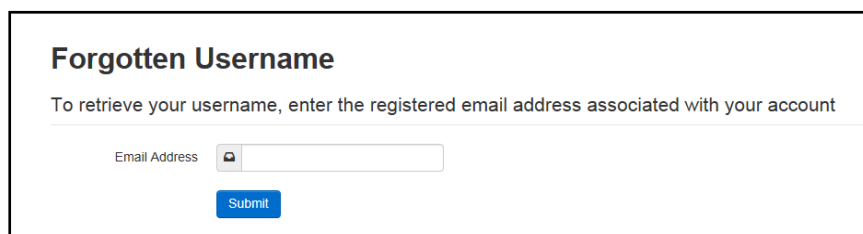
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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

Retrieving Your User Name

If you forget your user name:

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

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

3. Access your registered email account and open the email received to retrieve your user name.

Resetting Your Portal Password

To reset your password:

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

> **Forgotten Password**
> To reset your password enter the requested account details
>
> User name   👤 [_____]
>
> Email Address   🔒 [_____]
>
> **Submit**

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.

> 🏠 Home
>
> **Secret Question**
> Please provide the answer to your secret question
>
> **Secret Question**   🔒 Month of Birth
>
> **Secret Answer** *   🔓 [_____]
>
> **Submit**
>
> Forgotten your secret answer?

4. Access your registered email account and open the email received.

5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

If you need to reset your secret question:

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

> **Secret Question/Answer Reset**
> To reset your secret question enter the requested account details
>
> User name *   👤 [_____]
>
> Email Address *   🔒 [_____]
>
> **Submit**

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).

Setting Up Two Step Verification

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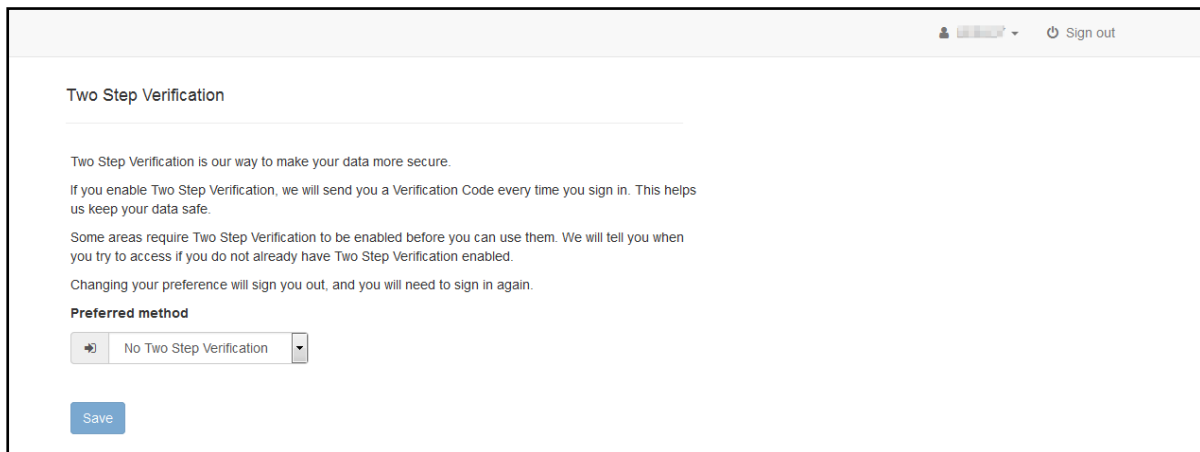
If two step verification is enabled, you will be sent a verification code every time you sign in.

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

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.
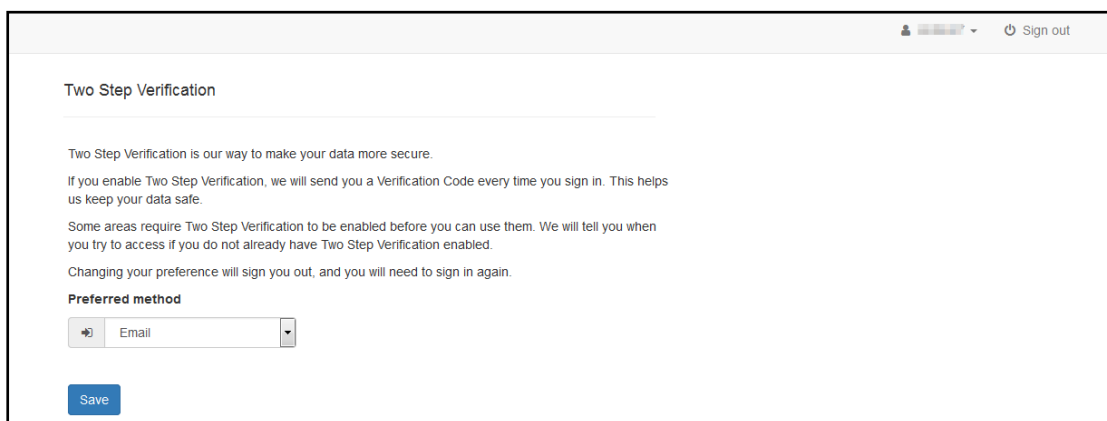
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.

3. Click the **Save** button.

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

Disabling Two Step Verification

To disable two step verification:

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

2. Select **No Two Step Verification** from the **Preferred method** drop-down.

3. Click the **Save** button.

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

Reviewing Users

Introduction

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

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

Viewing User Details

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

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

Updating a User Email Address

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

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

2. Enter a new **Email** address and click the adjacent update button.

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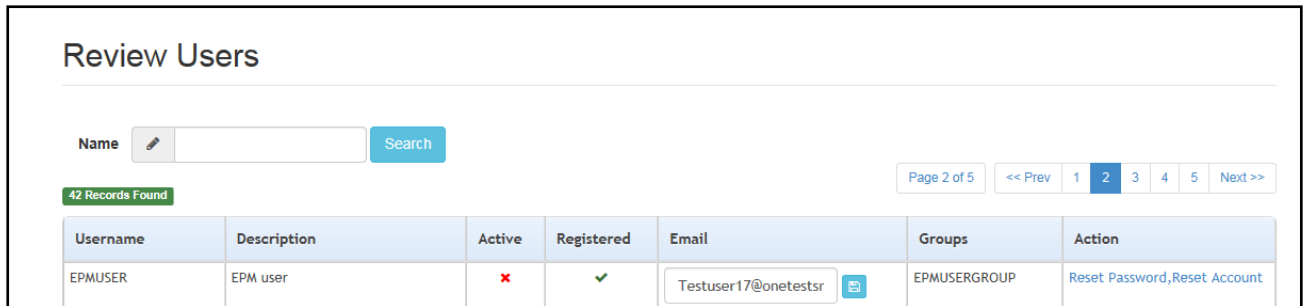
If a user has forgotten their password, to enable them to reset their password:

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

2. Click the **Reset Password** link to send an email to the current **Email** address asking the user to update their password.

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

Resetting a User Account

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

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

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

2. Click the **Reset Account** link.

> **NOTE:** *The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see* Resetting a User Password *on page* 19

04 | DAF Administration

Configuring the DAF Portal

If the user has permission to configure the DAF portal, the **Disability Access Fund | Configure Disability Access Fund** menu route is displayed on the home page and the **Configure Disability Access Fund** tile is displayed on the **Welcome to the Provider Disability Access Fund Admin Portal** page.
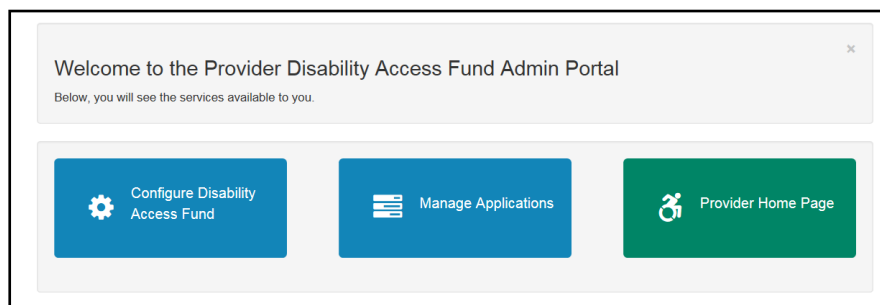
1. Click the **Configure Disability Access Fund** tile on the welcome page to display the **Configure Disability Access Fund** page.

The Local Authority uses the **Configure Disability Access Fund** page to control whether or not providers can access the DAF home page and to configure the application parameters.

2. If required, click the **Show Disability Access Fund** button to change the value.

> *NOTE: If this value is changed, the user needs to log out and then log in again before the change is applied.*

3. If required, click one or more of the **Application configuration** buttons to change the value.

4. If required, update the list of accepted file extensions used to attach evidence in support of an application.

5. If required, select a new message template to be used when sending a message to inform a provider that the application has been approved or rejected.

6. Click the **Save** button.

05 | Completing a DAF Application

Introduction

This chapter describes the process that the service provider follows to complete a DAF application for a child attending their service.

If the provider has permission to apply for DAF and the **Show Disability Access Fund** button is set to **ON**, on the configuration page, the **Disability Access Fund** tile is displayed on the Provider home page**.**

For more information, see [Permission to Apply for DAF](#) on page *14* and [Configuring the DAF Portal](#) on page *21*.
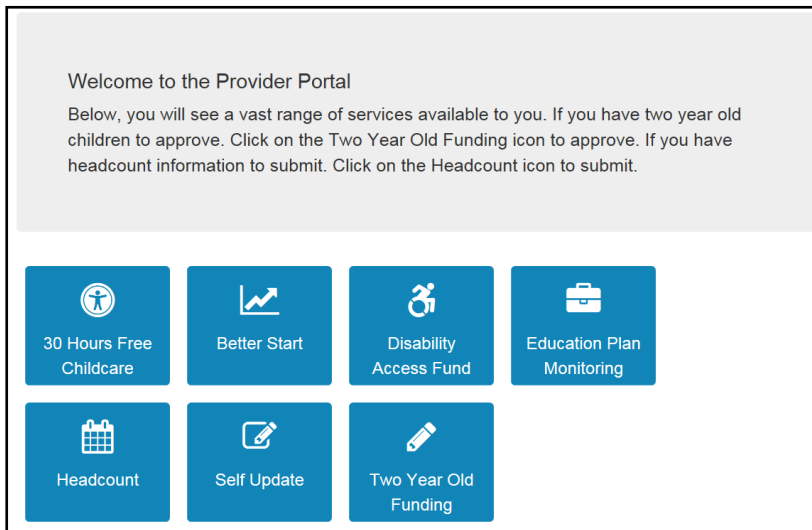
When completing a DAF application, the provider can search for children who are known to attend one of their services or, if **Allow DAF applications for new children** is set to **ON** on the **Configure Disability Access Fund** page, they can add a new child.

> *NOTE:* Newly added children must be processed via the Portal Back Office before they are displayed on the Headcount portal.

For more information about configuring the DAF portal, see [Configuring the DAF Portal](#) on page *21*.

Providers and services are assigned to a user via **Administration | Manage Access**. For more information about granting access, see [Managing User Access](#) on page *15*.

Creating a New Application

DAF Application screen has been updated with a **Show Eligible Children** check box. The box is ticked by default and displays a list of eligible children for the selected Provider.

To display a list of ineligible children, remove the tick from **Show Eligible Children**.

To create a new application:

1. Click the **Disability Access Fund** tile to display the welcome page.
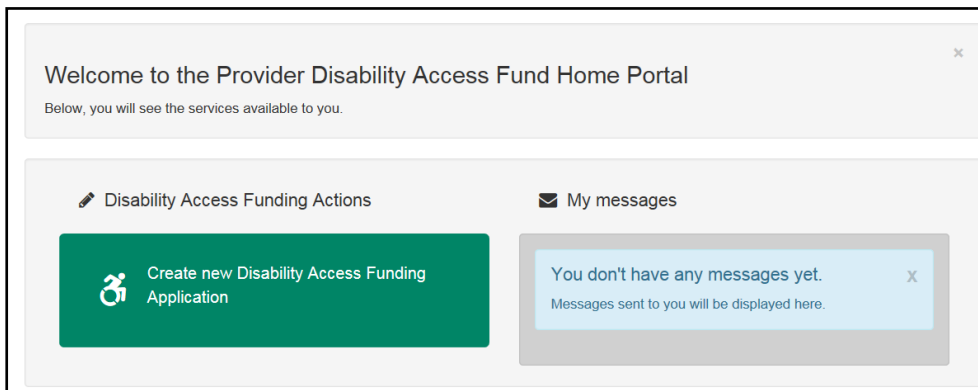
2. Click the **Create new Disability Access Funding Application** button.

   If you are associated with more than one provider or service, the following dialog is displayed:
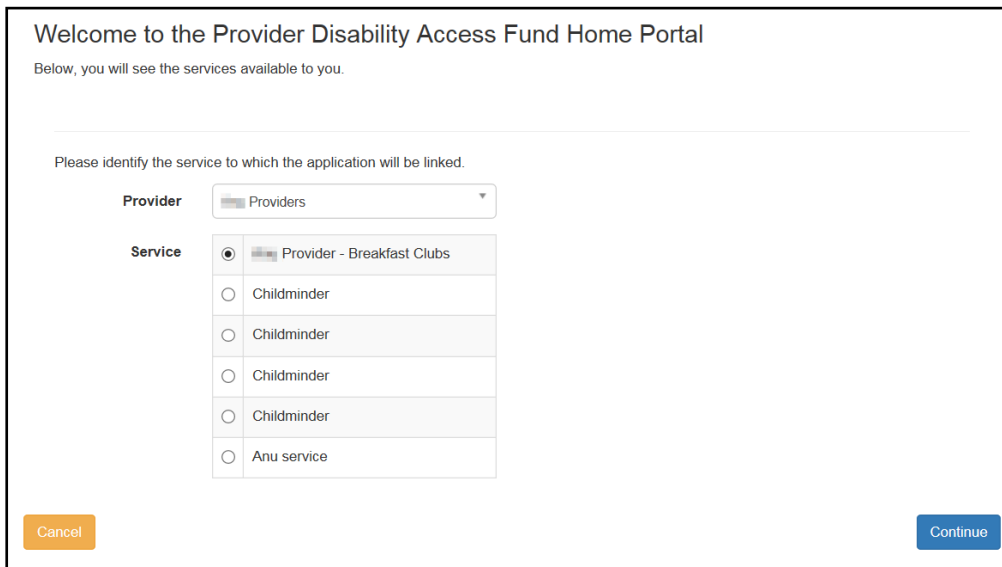
   a. Select the required **Provider** from the drop-down.

   b. Select the radio button for the required **Service**.

   c. Click the **Continue** button to display the **Disability Access Funding Application** page.

   A list of eligible children is displayed on screen. To display a list of ineligible children, remove the tick from **Show Eligible Children** tick box.

Completing a DAF Application

NOTES: *If a child is not eligible or has already been approved, they cannot be selected.*

If the required child is not listed, they can be added if the DAF application has been configured to allow applications for new children. For more information, see Configuring the DAF Portal on page 21.

If the name is longer than the field allows, the child needs to be added by the Local Authority via the v4 Client. A message is displayed. The message can be configured in the Provider portal via **Administration | Text Customisation***. For more information, see Customising Text on page 9.*

Newly added children must be processed via the Portal Back Office before they are displayed on the Headcount portal.

If a Child name is entered in the **Find a Child** field, the list of names will be filtered out to display only the details of that Child.

If the tick is removed, a list of ineligible children will be displayed. Replacing the tick will show only the name of the child that was originally entered in the **Find a Child** field. Clear the child's name to display the list of eligible children.

3. Select a child and click the **Continue** button.

    Alternatively, to add a new child:

    a. Click the **Add Child** button to display the **Disability Access Funding Application** page. Enter the child details.

    The address section has been updated to include **Building Name**. A validation check has been implemented against each field mentioned below:

    -   House Number
    -   House Name
    -   Building Name

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

    b. Click the **Continue** button.

> NOTE: *The guidance text on this page is configurable by the Local Authority. For more information, see* [Editing Customised Text](#) *on page 10.*

4. If required, click the browse button to attach a **Parental Agreement**.

   Alternatively, select the check box to provide the parental agreement by post.

5. If required, click the browse button to attach a **DLA Award Letter** to the application.

   Alternatively, select the check box to provide the DLA award letter by post.

6. Enter **Details to support your Disability Access Funding claim**.

7. Click the **Continue** button.

8. Select the **All the DAF details provided by me are correct** check box.

9. Click the **Submit** button to display the **Application submitted** page.

    Application submitted

    Your application for George King has been submitted. You will be notified of the result of your claim by a message to your provider portal account.

    Application reference number for your information:

    DAF-1709-AQV1UQF5

    The application reference above will help us with enquiries - please store it somewhere safe. If you have any further enquiries about your application or would like to take any further action please contact us at: PO Box 244 Shepherds Bush London E1

    Finish

10. Click the **Finish** button.

06 | **Processing a DAF Application**

Introduction

A Local Authority administrator with permission to manage applications can approve or reject a DAF application. For more information**,** see [Permission to Manage Applications](#) on page *14*.

If the **Show Disability Access Fund** button is set to **ON,** on the configuration page, the **Disability Access Fund** tile is displayed on the home page**.** For more information**,** see [Configuring the DAF Portal](#) on page *21*.
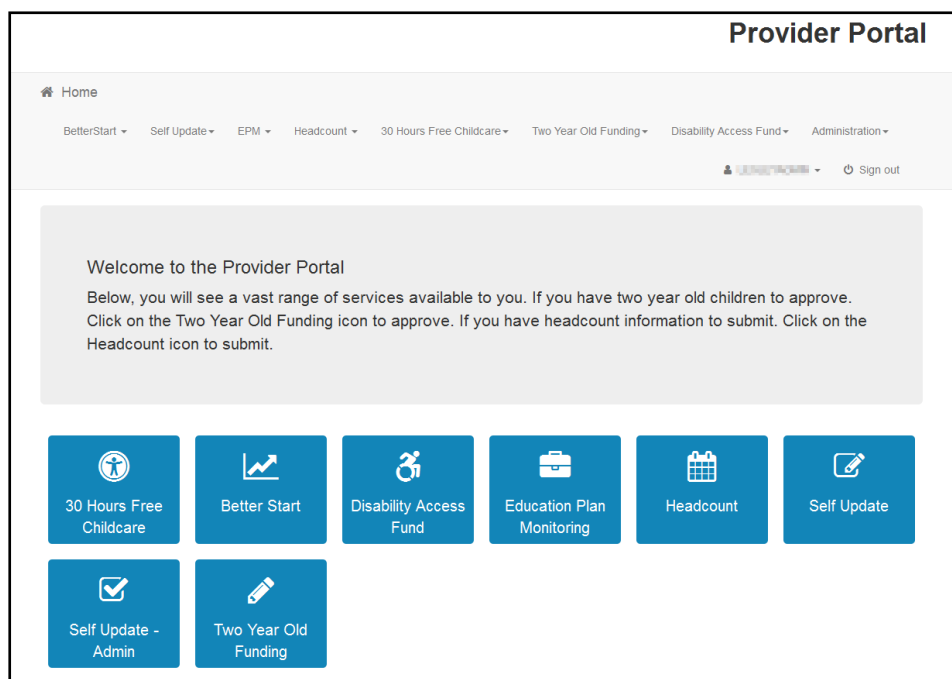
Approving a DAF Application

1. On the **Home** page, click the **Disability Access Fund** tile to display the Welcome page.

    If the Local Authority DAF Administrator has permission to manage applications, the **Manage Applications** tile is displayed on the Welcome page**.** For more information, see [Permission to Manage Applications](#) on page *14*.

2. Click the **Manage Applications** tile to display the **Manage Applications** page.

3. To search for an application, enter a **Child's name** or **Application/Placement Reference** and click the **Search** button.

4. Click the **Applicant** link to display the **Application Details** page.

5. If required, click the **Application History** link to display a list of actions linked to the application.

Processing a DAF Application

6. If required, click the **Information provided to support application** link to display a list of files attached to the application.

7. If required, click the **Add Note** button to display the **Add Note To Application** page.

a. Enter a note to be added to the application. This will be visible to other administrators but not to the applicant.

b. Click the **Save** button.

8. Select the **Approval** check box.

> *NOTE: The **Message** displayed in **Information provided to support application**, is entered by the provider when the application is created.*

9. Click the **Approve** button to display the **Approve Application** page.

10. If required, select the check box to include a private note (not visible to the applicant).

11. Click the **Approve** button to display a confirmation message.

12. Click the **OK** button.

Rejecting a DAF Application

1. On the **Home** page, click the **Disability Access Fund** tile to display the Welcome page.

   If the Local Authority DAF Administrator has permission to manage applications, the **Manage Applications** tile is displayed on the Welcome page. **For more information,** see Permission to Manage Applications on page *14*.

2. Click the **Manage Applications** tile to display the **Manage Applications** page.

3. To search for an application, enter a **Child's name** or **Application/Placement Reference** and click the **Search** button.

4. Click the **Applicant** link to display the **Application Details** page.

5. Click the **Reject** button to display the **Reject Application** page.

6. If required, select the check box to add a private **Application Note** explaining the reason for the rejection. This will not be visible to the applicant.

7. If required, select the check box to include a **Message To Applicant** explaining the reason for the rejection.

8. Click the **Reject** button.

07 | **Updating Student Details in One v4**

Introduction

Local Authorities with a Provider Portal Headcount licence can use the Provider portal to approve DAF applications and the student details record is automatically updated in the v4 Client. For more information, see Using the Provider Portal to Automatically Update the Student Details on page *33*.

Local Authorities not using the Provider Portal Headcount module can manually enter details of approved DAF applications into the v4 Client. For more information, see Manually Recording a DAF Application for a Child in the v4 Client on page *34*.

Using the Provider Portal to Automatically Update the Student Details

When a DAF entitlement check is performed in the Provider portal for a child with a student record in the One v4 Client, the details automatically update the child's record.

The **Disability Access Fund** sub panel on the **Student Details | Early Years Additional Information** panel is updated with the following read-only information:

■ **From Portal** check box is selected (ticked).

■ **Approval Age Start**

■ **Eligible** check box

■ **Approval Date**

■ **Provider Service**

■ **Paid Period**.

> *NOTE: There can be up to 2 rows in the **Disability Access Fund** grid for the child; one for age 3 and one for age 4.*

# Manually Recording a DAF Application for a Child in the v4 Client

Local Authorities that are not using the Provider Portal Headcount can enter details of approved DAF applications manually in the v4 Client to enable the generation and authorisation of payments to Early Years providers.

1. Select **Focus | People | Students** to display the **Student Enquiry** page.

2. Enter search criteria and click the search button to display matching students.

3. Highlight the required student and click the **Open In New Window** button to display the **Student Details** page.

4. Select the **Early Years Additional Information** panel.
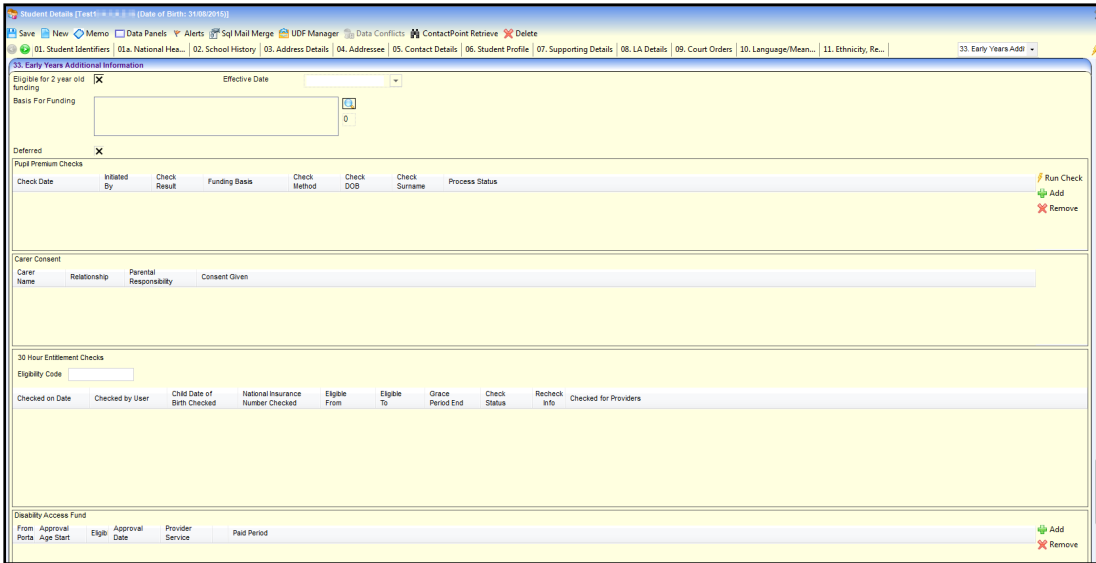
5. Click the **Add** button on the **Disability Access Fund** sub-panel.
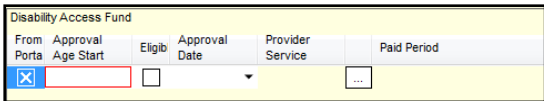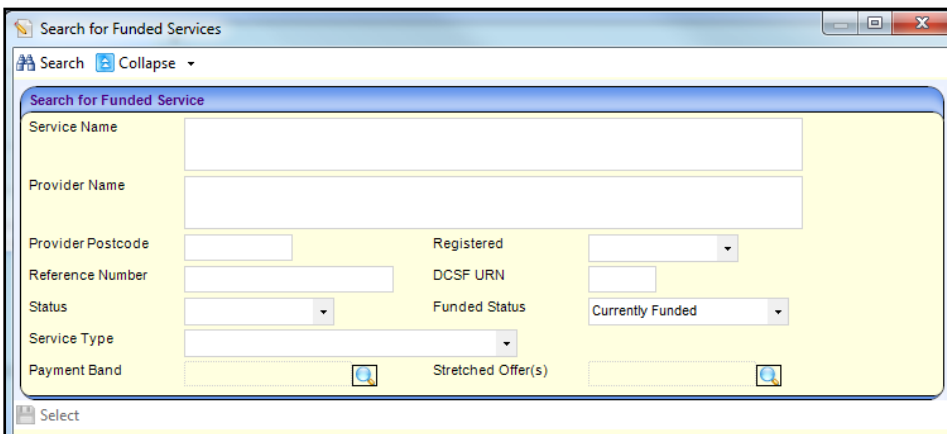

6. The **From Portal** check box is disabled and diplays a cross.

7. Enter either 3 or 4 in the **Approval Age Start**.

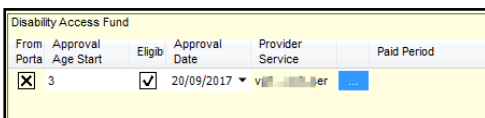8. Select the **Eligible** check box to display a tick.

9. Select an **Approval Date**.

10. Click the **Provider Service** browse button to display the **Search for Funded Services** dialog.

11. Search for the required funded service.

12. Highlight the required service and click the **Select** button.

13. Click the **Save** button.

> **NOTE:** There can be up to 2 rows in the **Disability Access Fund** grid for the child, one for age 3 and one for age 4.

08 | **Making DAF Payments**

Introduction

When the student details have been updated in the v4 Client to record DAF eligibility, a payment can be generated.

DAF eligibility is displayed on the **Children** panel via **Focus | Early Years | Search for Funded Services** using the following fields:

- **DAF Approval Date** is the date that the DAF application was approved.

- **DAF Eligible** is a read-only check box that displays a tick if the child is eligible.

- **DAF Status** is set to GEN if the payment has been generated and AUTH if the payment has been authorised.

- **DAF Paid On** is the date that the DAF payment was made.

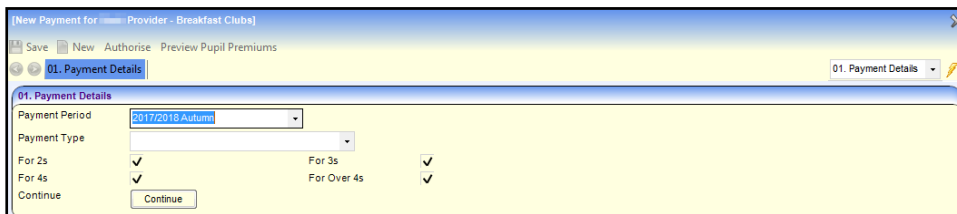## Generating DAF Payments

Generating Individual DAF Payments

When a child has been approved for DAF, an individual payment can be made to the funded service.
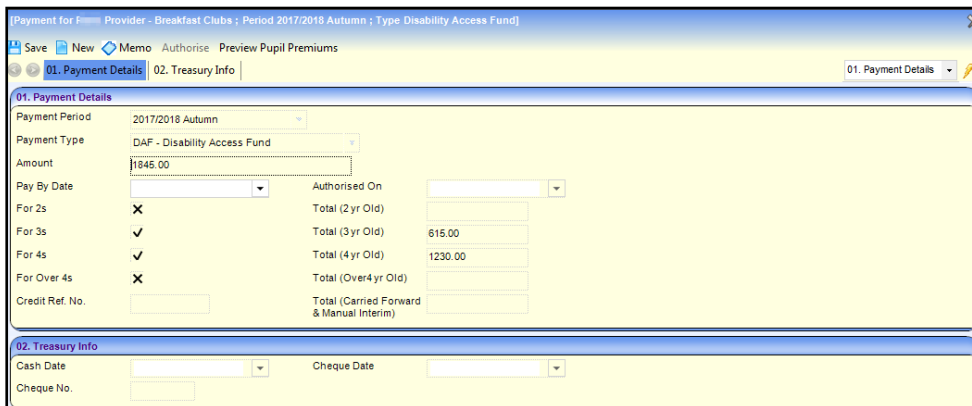
1. Select **Focus | Early Years | Search for Funded Services** to display the **Search for Funded Services** page.

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

3. Select the required service and click the **Open in New Window** page to display the **Funded Service** page.
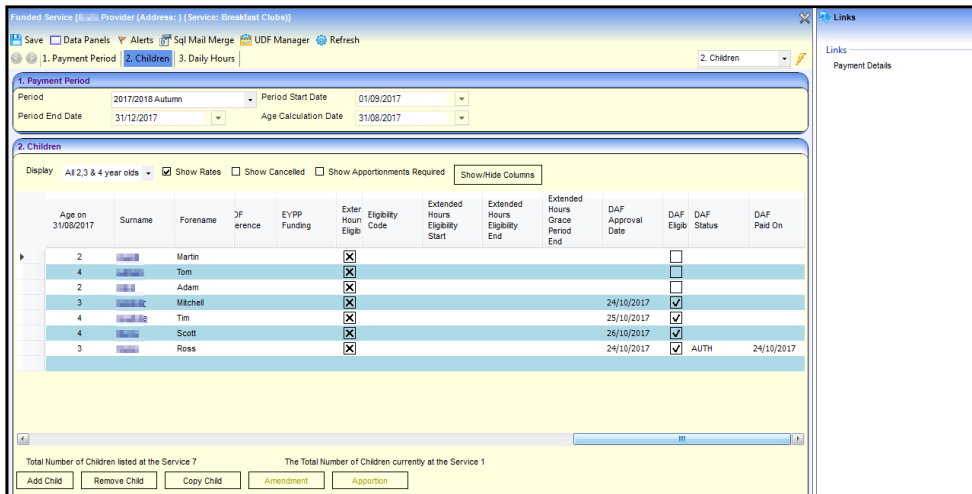
4. Click the **Payment Details** link to display the **Payment Details** page.

5. Click the **New** button to display the **New Payment** page.

6. Select **DAF - Disability Access Fund** from the **Payment Type** drop-down and click the **Continue** button to display the **Payment Details**.

7. Click the **Save** button to generate the payment and display the **Payment Breakdown**.

Generating Bulk DAF Payments

A bulk DAF payment can be generated for one or more providers against 3 and 4 year-old children.

1. Select **Focus | Early Years | Generate Payments** to display the **Payment Run Enquiry** page.


2. Click the **New** button to display the **Generate Payments** page.

3. Select a **Payment Period**.

4. Select **DAF - Disability Access Fund** from **the Payment Type** drop-down list to automatically update the age ranges selected.

   The **For 3s** and **For 4s** check boxes are selected (ticked) and disabled. The **For 2s** and **For Over 4s** check boxes are de-selected (cross) and disabled.


5. If you require the pre-defined Payment Schedule Report to be produced when the payments are generated, select the **Report Required** check box to display a tick.

6. Select the providers:
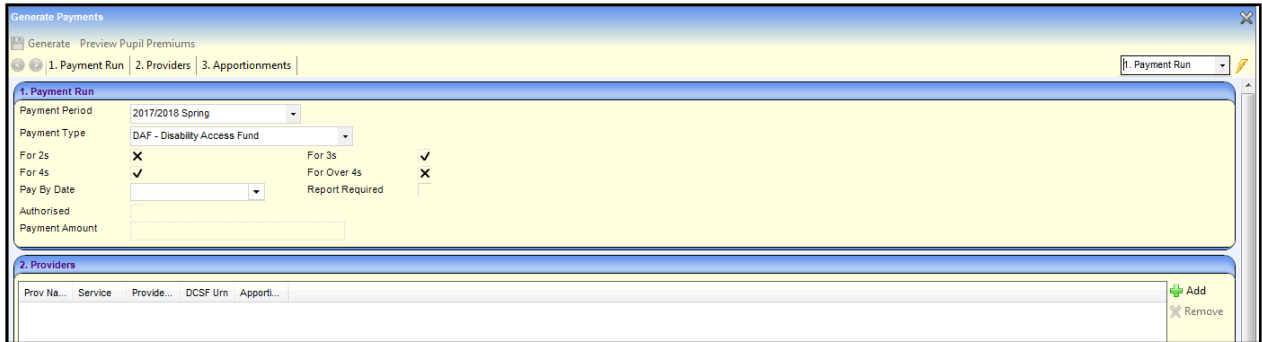
a. In the **Providers** panel, click the **Add** button to display the **Add Providers To Payment Run** dialog.
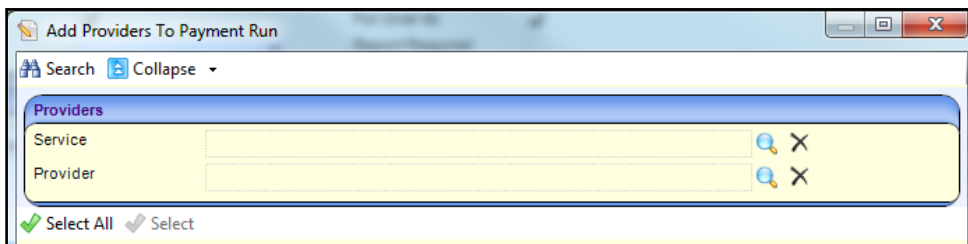
b. If required, click the browse button to select a **Service** or a **Provider**.

c. Click the **Search** button to list the providers who have outstanding DAF payments for the selected **Payment Period**.
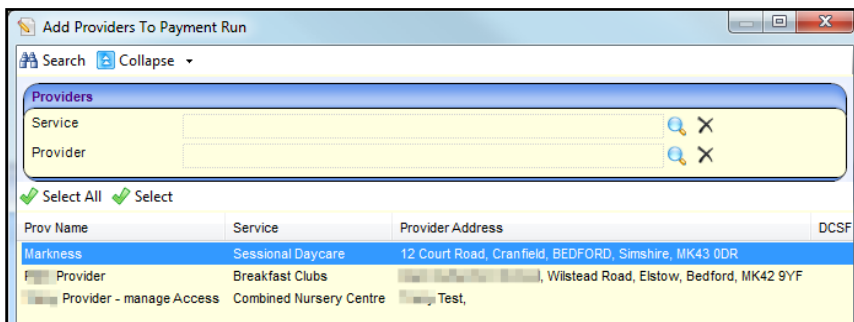
d. Click on the required provider or click **Select All** to select the whole list.

e. Click the **Select** button to display the selected providers on the **Generate Payments** page.

7. Click the **Generate** button.

Authorising DAF Payments

After generating a DAF payment it must be authorised before the payment is made.

1. Select **Focus | Early Years | Authorise Payments** to display the **Payment Authorisation Enquiry** page.

2. Click the **New** button to display the **New Authorisation** page.


3. Select a **Payment Period**.

4. Select **DAF - Disability Access Fund** from the **Payment Type** drop-down.

5. Select an **Authorised On** date.

6. Click the **Add** button to display the **Select Payments to be Authorised** window.

7. If required, click the browse button to select a **Service** or a **Provider**.

8. Click the **Search** button to list the providers who have DAF payments that have been generated but not authorised for the selected **Payment Period**.
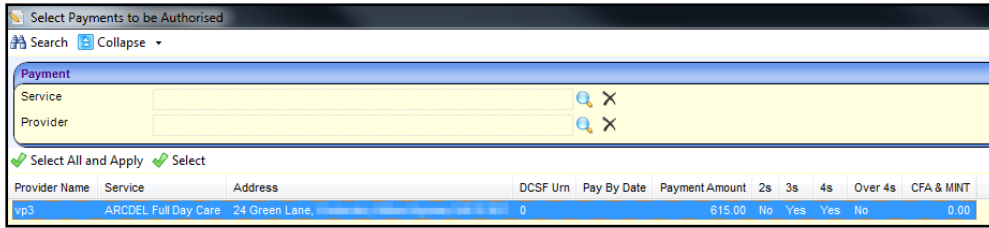
9. Click the **Select** button to select the highlighted payment or the **Select All and Apply** button to select all of the listed payments.

10. Selected payments are displayed on the **Generated Provider Payments** panel. The **Total to Authorise** displays the total of all payments included.
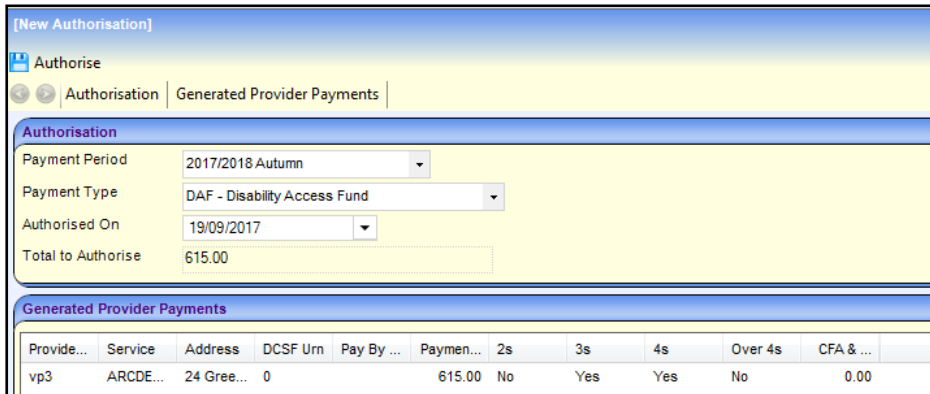
11. Click the **Authorise** button to authorise the payment and display the **Authorisation** page.

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