



# One Self Update Provider Portal Handbook

last updated for the Summer 2020 (3.72)  
release

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Summer 2020	3.72	<p><b>Provider Submissions</b></p> <p><b>Review Submission</b> field has been added in Self Update - General Configuration. This allows a Provider submissions to be automatically accepted without requiring approval from local authorities.</p> <p>For more information see <a href="#">Managing Provider Self Updates</a> page 24</p>
Spring 2020	3.71	<p><b>Filtering Providers</b></p> <p>The <b>Provider – Self Update</b> screen consists of 3 new filters, which are:</p> <ul style="list-style-type: none"> <li>• <b>Show Non-Funded Services</b> and <b>Show Funded Services</b>.</li> </ul> <p>These filters allow admin staff to display a list of funded or non-funded Providers.</p> <ul style="list-style-type: none"> <li>• <b>Show only closed Providers</b></li> </ul> <p>This filter allows SUPP Admin staff to filter Providers who are active and In active by using the '<b>Show only closed Providers</b>' filter.</p> <p><b>Services - Self Update</b></p> <p>A new column titled <b>Funded</b> has been added to the <b>Services - Self Update screen</b>. This shows if a Service is funded or not by displaying '<b>Yes</b>' or '<b>No</b>' against each service.</p> <p>For more information see <a href="#">Filtering Providers</a> page no. 24</p>

Date	Release	Description
Autumn 2019	3.70	<p><b>File Upload</b></p> <ul style="list-style-type: none"> <li>File Upload is a new functionality in the software. With this new functionality (and based on configuration options set by the local authority) Providers have the option to upload file(s) against their service(s) and send them to their local authority</li> </ul> <p><i>For more information see <a href="#">Managing and Configuring File Upload</a> on page 39</i></p> <ul style="list-style-type: none"> <li>A new permission has been introduced that controls whether users / groups can access the Provider Self Update Portal  Admin   File Upload tile. The new permission is called '<b>Self Update File Upload</b>'.</li> </ul> <p>For more information see <a href="#">SUPP Administration Access</a> page 14</p> <ul style="list-style-type: none"> <li>Local authority staff (with appropriate permissions) can manage the files that have been uploaded by providers and choose whether to view them, delete them or link them as a linked document against the services record in the v4 client via <b>Focus   Early Years   Search for Service Provision   Service Details   Linked Documents</b>.</li> </ul> <p>For more information see <a href="#">Managing and Configuring File Upload</a> on page 39</p> <ul style="list-style-type: none"> <li>Local authority staff, through a few numbers of configuration options can control whether providers have the ability to upload files or not. If they are allowed, then the authority can specify which file type extensions, the number of files that can be uploaded per service in one submission (between 1 and 5) and whether providers can delete the files they have uploaded.</li> </ul> <p><i>For more information see <a href="#">File Upload to Local Authority</a> on page55</i></p>
Apr 2019	3.68	<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 Audit Log on page 12</p>
Autumn 2018	3.67	<p><b>Guidance Notes</b></p> <p>Guidance Notes can now be configured for Travel, Costs and Availability found in the <b>Text Customisation</b> screen under <b>Self Update Guidance</b> group.</p> <p>For more information, see <a href="#">Guidance Notes</a> on page</p>

Date	Release	Description
		<p><b>Comments for Local Authority</b></p> <p>Entries made by Providers in the <b>Comments for Local Authority</b> field is now recognised as a <b>Change</b></p> <p>For more information see <a href="#">Approving Provider Updates</a> on page 34</p>
		<p><b>School Pickups</b></p> <p>Local Authorities can configure school pickups to display the relevant bases list to a provider.</p> <p>For more information, see <a href="#">Changes to school pickups</a> on page 82.</p>
		<p><b>Offers Extended Childcare</b></p> <p><b>Extended Hours Ceases from</b> in Provider Portal have been changed to reflect the option chosen in v4 Client.</p> <p>For more information, see <a href="#">Updating Service Basic Details</a> on page 67.</p>
		<p><b>EY Census Staff Qualifications</b> have been re-organised to reflect the lowest to highest qualification as defined in the EY Census guide.</p> <p>For more information, the <i>Statutory Early Years Census Handbook</i> is available on the <a href="#">One Publications</a> website.</p>





# 02 | Introduction to the Self Update Provider Portal

## Overview

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

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

## Using this Handbook

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

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

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

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

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

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

# 03 | Administering the Provider Portal

## Introduction

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

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

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

## Setting the Language in Chrome

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

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

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

## Common Functionality

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

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

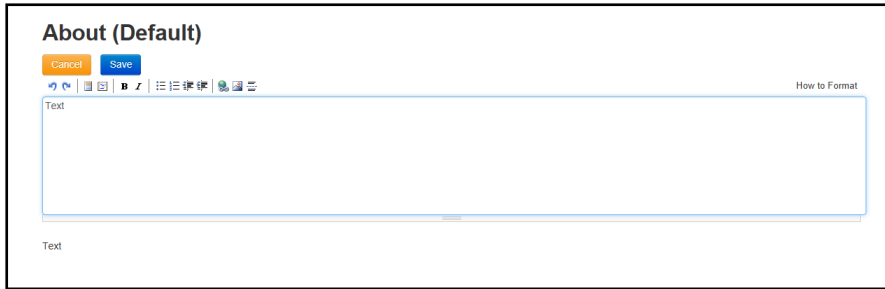
All text, field labels and messages that are displayed on the website can be configured.

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

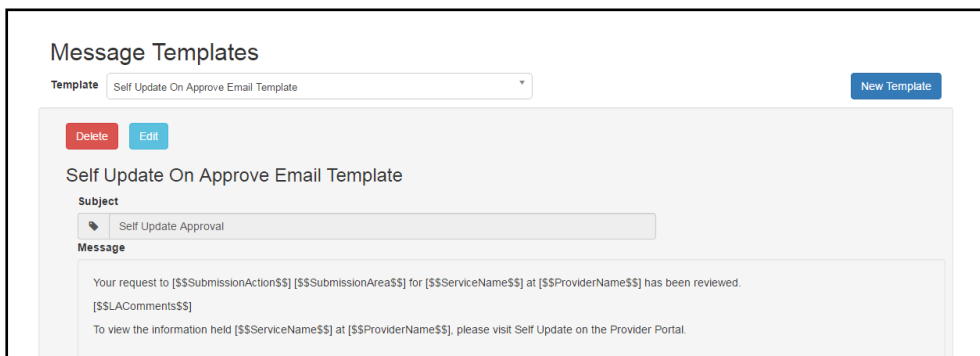
## Administering the Provider Portal



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

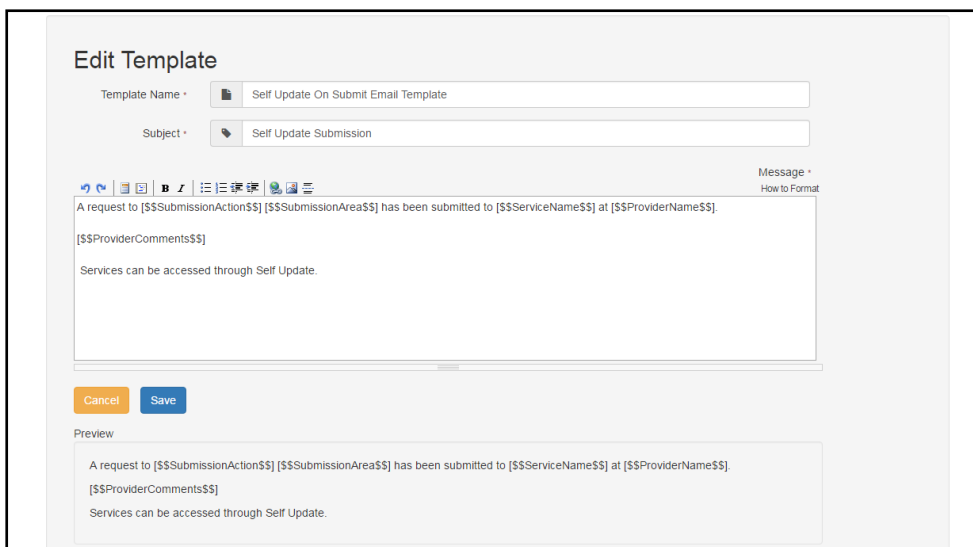
## Message Templates

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



## Editing a Template

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



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

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

5. Click the **Save** button.

## Managing User Accounts

The association of permission roles to a user account in the v4 Client enables access to the Self Update Provider Portal (SUPP). The permissions associated with the role control user access to business processes. For information about permissions, see [Permissions](#) on page 14.

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

## Creating a Portal User Account

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

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

## Setting up User Accounts in the v4 Client

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

1. Create a user account.
2. Create a user group.
3. Associate the user account to the user group.
4. Assign business processes to the user group.
5. Assign access rights. For more information, see [Assigning Access to Business Processes](#) on page 14.

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

## Setting Up Two Step Verification

### Introduction

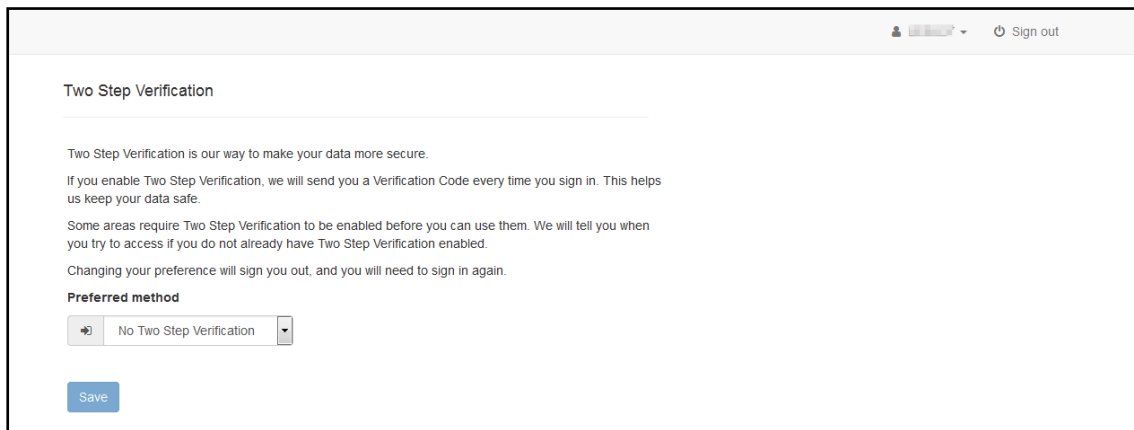
If two step verification is enabled, you will be sent a verification code every time you sign in.

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

### Enabling Two Step Verification

To enable two step verification:

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



The screenshot shows the 'Two Step Verification' configuration page. At the top right, there is a user profile icon and a 'Sign out' button. The main heading is 'Two Step Verification'. Below it, there is a horizontal line. The text explains that Two Step Verification is for security and that codes will be sent upon sign-in. It also notes that some areas require it and that changing preferences will sign the user out. Under the 'Preferred method' section, a dropdown menu is set to 'No Two Step Verification'. A blue 'Save' button is at the bottom left.

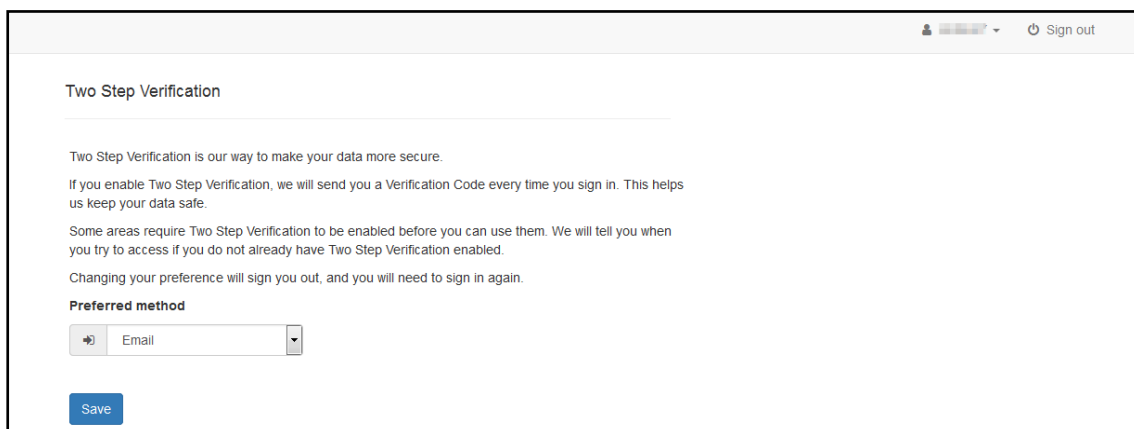
2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

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

### Disabling Two Step Verification

To disable two step verification:

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



The screenshot shows the 'Two Step Verification' configuration page, identical to the previous one. However, the 'Preferred method' dropdown menu is now set to 'Email'. The 'Save' button remains at the bottom left.

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

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

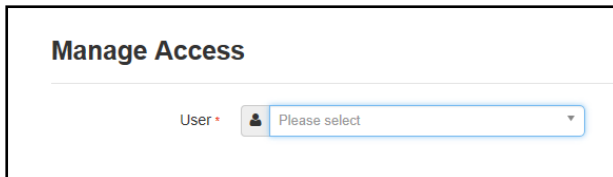
## Managing User Access

### Granting Access to Providers and Services

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

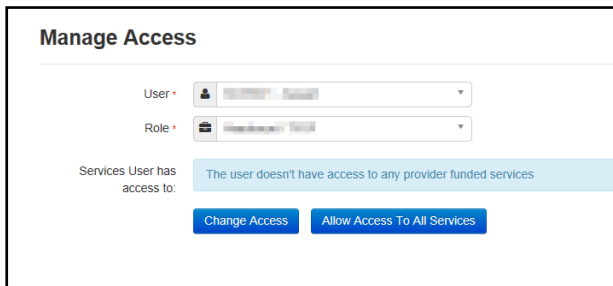
To update access for the selected user:

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



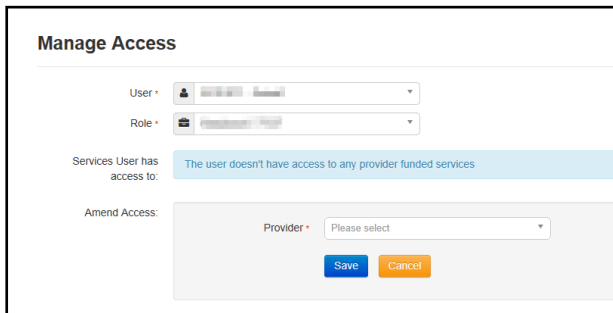
The screenshot shows the 'Manage Access' page with a 'User' dropdown menu set to 'Please select'.

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



The screenshot shows the 'Manage Access' page with a user selected. Below the 'Role' dropdown, a message states: 'The user doesn't have access to any provider funded services'. 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 'Amend Access' panel with a 'Provider' dropdown menu set to 'Please select'. There are 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.

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

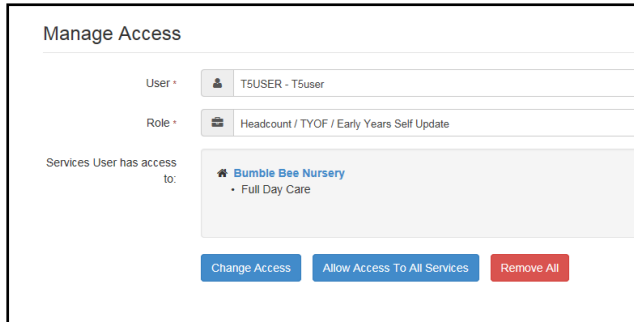
- Providers who need to have access to their services.
- Local Authority Early Years administrators who need to have access to all providers for SUPP management.



## Removing Access from a User

To remove a user's access to all services:

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



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

## Audit Log

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

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

*Note : Details of the user ID can be found out 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.

Review Users

Name  Search

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

42 Records Found

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

Cancel Refresh

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:

Review Users

Name  Search

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

42 Records Found

Username	Description	Active	Registered	Email	Groups	Action
EPMUSER	EPM user	✗	✓	Testuser17@onetestsr	EPMUSERGROUP	Reset Password, Reset Account

## Administering the Provider Portal

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 13

## Permissions

### Assigning Access to Business Processes

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

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

### Portal Administration Access

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

02. Business Processes					
Name	Read	Read-Write	Read-Write-Delete	Deny	
▶ Provider Portal		✓			
General Site Administrator		✓			

### SUPP Administration Access

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

- Self Update Administration
- Self Update Early Years

as shown in the following graphic:

02. Business Processes					
Name	Read	Read-Write	Read-Write-Delete	Deny	
▶ Provider Portal		✓			
Self Update				✓	
Self Update Administration		✓			
Self Update Early Years		✓			
Self Update File Upload					✓

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

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

as shown in graphic below.

01. Main Processes				
Main Business Processes	Provider Portal			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal				
Self Update				
Self Update Administration				
Self Update Early Years				
Self Update File Upload				

## Provider Access

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

- Self Update
- Self Update Early Years

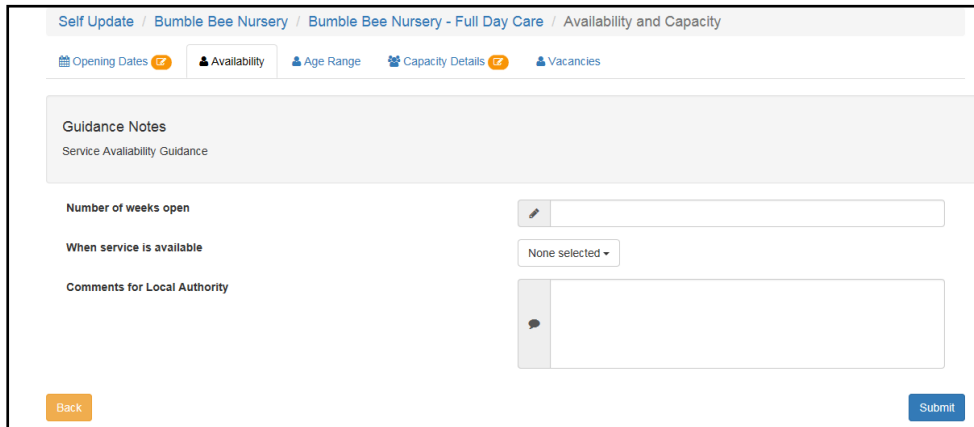
as shown in the following graphic:

01. Main Processes				
Main Business Processes	Provider Portal			
02. Business Processes				
Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal				
Self Update				
Self Update Administration				
Self Update Early Years				
Self Update File Upload				

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

## Guidance Notes

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



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

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

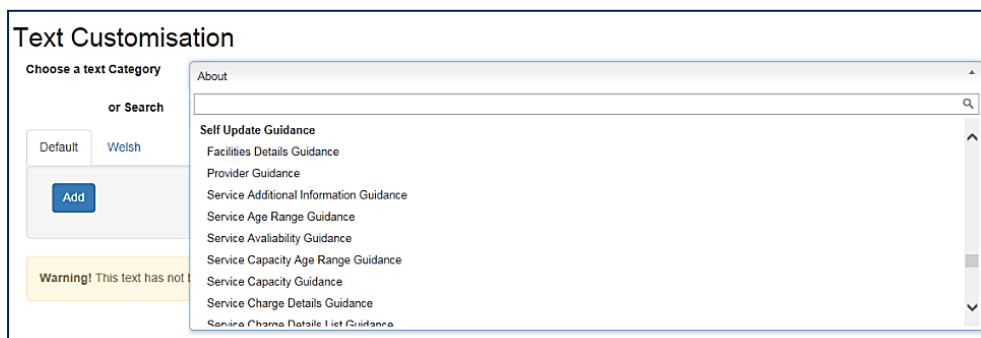
## Updating Guidance Notes

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

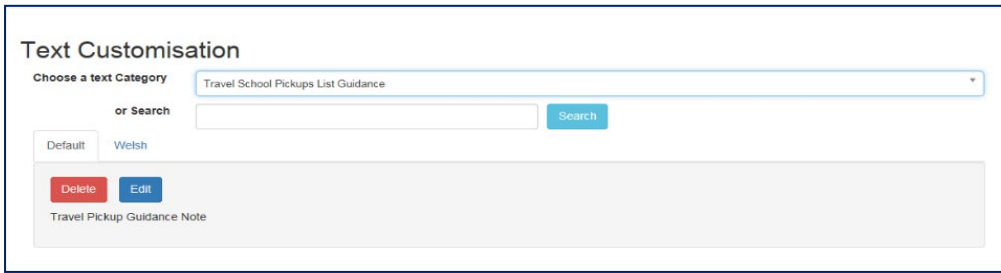
1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.



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



4. Select the required screen.



Text Customisation

Choose a text Category: Travel School Pickups List Guidance

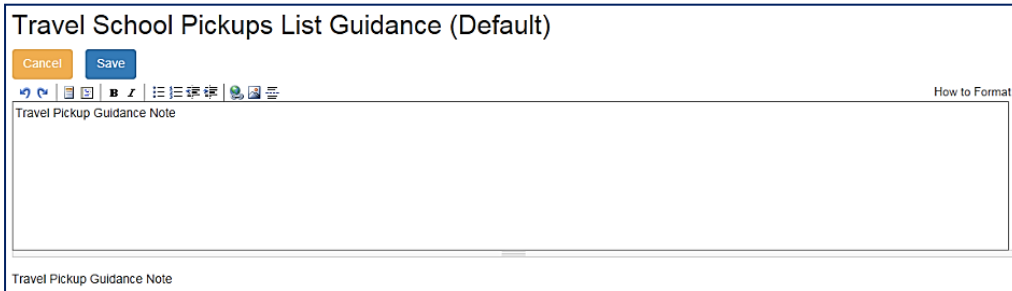
or Search: [Search]

Default | Welsh

Delete | Edit

Travel Pickup Guidance Note

5. Click the **Edit** button.



Travel School Pickups List Guidance (Default)

Cancel | Save

How to Format

Travel Pickup Guidance Note

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

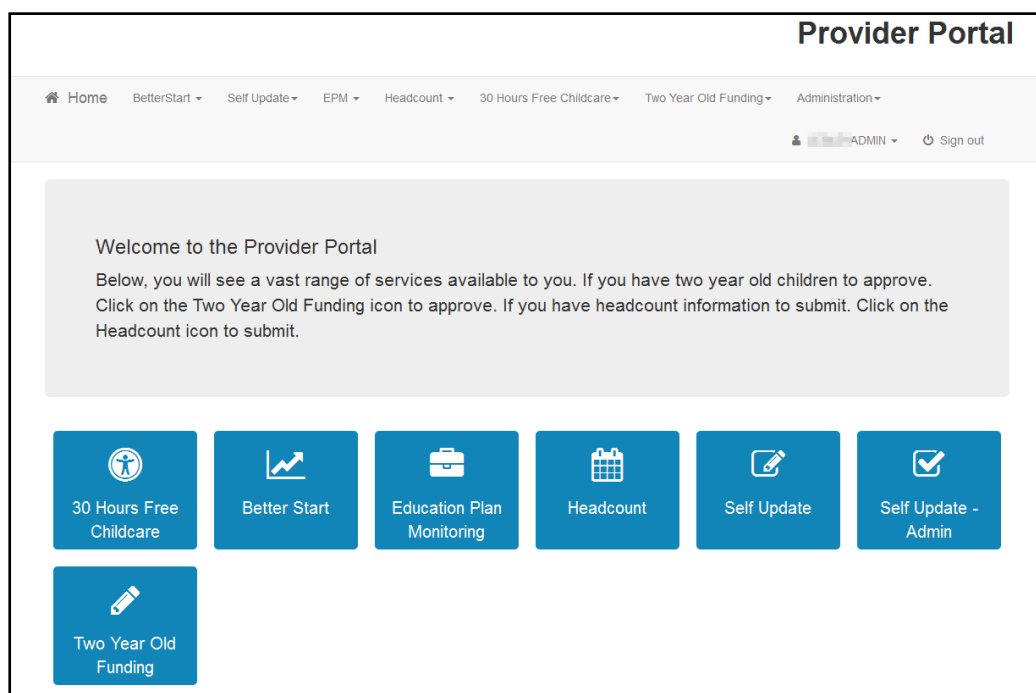
*Note: Guidance notes can be added in **Text Customisation** | **Self Update Guidance for Availability and Capacity, Travel, Cost and Facilities.***

# 04 | Administering the Self Update Provider Portal

## Introduction

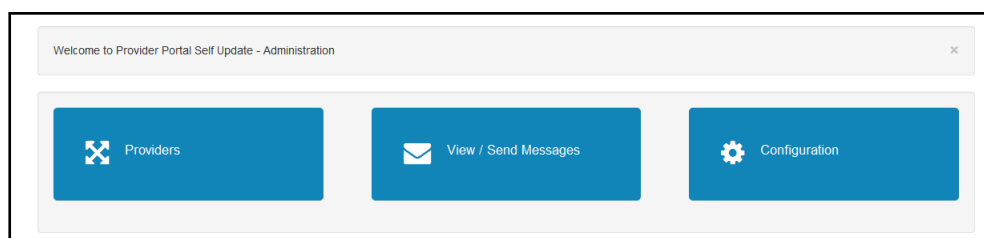
The SUPP administrator can configure the Self Update portal and manage changes to service details submitted by providers.

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



**NOTE:** The options and menu routes displayed on the home page are subject to permissions. For more information, see [Permissions](#) on page 14.

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



This page gives access to:

- Configure the Self Update portal. For more information, see [Configuring the Self Update Portal](#) on page 19.
- Manage changes submitted by providers. For more information, see [Managing Provider Self Updates](#) on page 24.
- Create and send messages to providers. For more information, see [Sending Messages](#) on page 42.

## Configuring the Self Update Portal

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

Configuration Key	Configuration Value	
Availability And Capacity	<input checked="" type="checkbox"/> ON	
Consent	<input checked="" type="checkbox"/> ON	
Travel	<input checked="" type="checkbox"/> ON	
Costs	<input checked="" type="checkbox"/> ON	
Facilities	<input checked="" type="checkbox"/> ON	
Additional Information	<input checked="" type="checkbox"/> ON	
Review Submissions (If set to "Off", this overrides Settings for Additional Information and Early Years Census)	<input checked="" type="checkbox"/> ON	
Review Additional Information Submissions	<input checked="" type="checkbox"/> ON	
Manage Additional Information	<a href="#">Manage Additional Information</a>	
Show Early Years Census	<input checked="" type="checkbox"/> ON	
Review Early Years Census Submissions	<input checked="" type="checkbox"/> ON	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input type="checkbox"/> OFF	
Enable email notifications upon Local Authority approval	<input type="checkbox"/> OFF	
Enable provider users to add services	<input checked="" type="checkbox"/> ON	
Run a Scheduled Notification Task	<input checked="" type="checkbox"/> ON	
Send email notifications if there are provider updates awaiting approval	<input type="checkbox"/> OFF	
Send email notifications if there are provider updates awaiting approval ONLY IF new updates have been submitted since the last email	<input checked="" type="checkbox"/> ON	
School pickups base group	<input type="text" value="Select an Option"/>	

This page enables the Local Authority to specify:

- Which information can be viewed and updated via the portal. The following information can be viewed and updated by providers if the **Configuration Value** is set to **ON**:
  - **Availability and Capacity:** This includes opening dates and times, age ranges, capacity, waiting list and vacancy information.
  - **Consent:** This includes consent to share information about the service.
  - **Travel:** This includes parking spaces, own transport and school pickups.
  - **Costs:** This includes service charges and sibling discount.
  - **Facilities:** The facilities supported by the provider.
  - **Additional Information:** Additional information about the service.
- Whether or not the Local Authority can review the additional information submitted by the provider and approve or discard them. If this is set to **OFF**, the additional information submitted by the provider updates the database directly.
- Which additional information can be viewed and updated by providers. Click the **Manage Additional Information** link to display the **Additional Information - Visibility Configuration for Providers** page. For more information, see [Managing Additional Information](#) on page 21.



- Whether or not the provider can view and update their Early Years Census information via the portal and the Local Authority can view and send a reminder message to providers who have not submitted their census.
- Whether or not the Local Authority can review the census information submitted by the provider and approve or discard the changes. If this is set to **OFF**, the census information submitted by the provider updates the database directly.
- The email address used to receive submission notifications.
- The email address used to send feedback.
- Whether or not email notifications will be sent to the configured email address every time a provider makes a submission.
- Whether or not providers can add a new service for approval.
- Whether or not a scheduled task is run to send the email notifications. For more information, see [Configuring a Scheduled Notification Task](#) on page 22.

## Updating the General Configuration

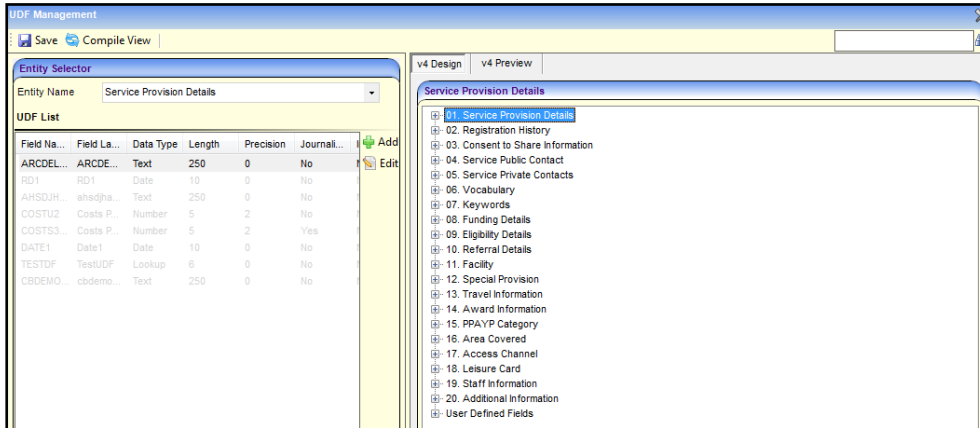
Each **Configuration Key** has a **Configuration Value** which can be updated. If the **Configuration Value** is a button, it can be set to **ON** or **OFF**.

To update the **Configuration Value**:

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.
2. If required, click the **Configuration Value** button, adjacent to the required **Configuration Key** to change the value.
3. If required and **Enable email notifications upon Provider submission** is set to **ON** or **Run a Scheduled Notification Task** is set to **ON**, enter an email address in the **Email address for submission notifications** field.
4. Enter an email address in **The self update email address** field. This is the email address used as the **From** address to send email feedback to both the LA and the provider, e.g. this address is used to send an email to the LA when a provider submits a change to their details and is the address used to send an email to the provider when the LA approves a change. For more information, see [Updating Service Details](#) on page 66 and [Approving Provider Updates](#) on page 34.
5. Click the **Save** button.

## Managing Additional Information

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



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

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

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

Configuration Key	Configuration Value
Costs Per Half Day - 2YR	<input checked="" type="checkbox"/> ON
Date1	<input checked="" type="checkbox"/> ON

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

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

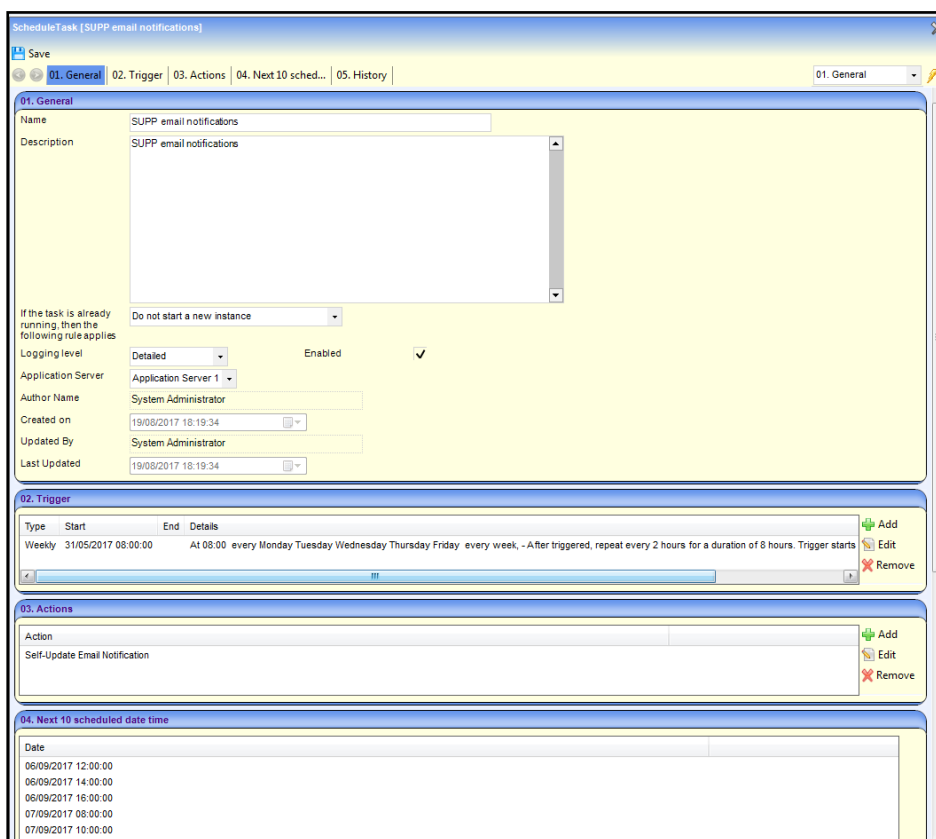
**NOTE:** At least one **Configuration Value** must be set to **ON**. If all values are set to **OFF** the changes cannot be saved.

## Configuring a Scheduled Notification Task

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

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

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



**More Information:** *v4 Scheduled Tasks* technical guide available on the [One Publications](#) website.

To configure the portal to run a scheduled notification task:

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

Self Update - General Configuration		
Configuration Key	Configuration Value	▲
Availability And Capacity	<input checked="" type="checkbox"/> ON	
Consent	<input checked="" type="checkbox"/> ON	
Travel	<input checked="" type="checkbox"/> ON	
Costs	<input checked="" type="checkbox"/> ON	
Facilities	<input checked="" type="checkbox"/> ON	
Additional Information	<input checked="" type="checkbox"/> ON	
Review Additional Information Submissions	<input checked="" type="checkbox"/> ON	
Manage Additional Information	<a href="#">Manage Additional Information</a>	
Show Early Years Census	<input checked="" type="checkbox"/> ON	
Review Early Years Census Submissions	<input checked="" type="checkbox"/> ON	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input checked="" type="checkbox"/> ON	
Enable email notifications upon Local Authority approval	<input checked="" type="checkbox"/> ON	
Enable provider users to add services	<input checked="" type="checkbox"/> ON	
Run a Scheduled Notification Task	<input type="checkbox"/> OFF	

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

Self Update - General Configuration		
Configuration Key	Configuration Value	▲
Availability And Capacity	<input checked="" type="checkbox"/> ON	
Consent	<input checked="" type="checkbox"/> ON	
Travel	<input checked="" type="checkbox"/> ON	
Costs	<input checked="" type="checkbox"/> ON	
Facilities	<input checked="" type="checkbox"/> ON	
Additional Information	<input checked="" type="checkbox"/> ON	
Review Additional Information Submissions	<input checked="" type="checkbox"/> ON	
Manage Additional Information	<a href="#">Manage Additional Information</a>	
Show Early Years Census	<input checked="" type="checkbox"/> ON	
Review Early Years Census Submissions	<input checked="" type="checkbox"/> ON	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input checked="" type="checkbox"/> ON	
Enable email notifications upon Local Authority approval	<input checked="" type="checkbox"/> ON	
Enable provider users to add services	<input checked="" type="checkbox"/> ON	
Run a Scheduled Notification Task	<input checked="" type="checkbox"/> ON	
Send email notifications if there are provider updates awaiting approval	<input checked="" type="checkbox"/> ON	
Send email notifications if there are provider updates awaiting approval ONLY IF new updates have been submitted since the last email	<input type="checkbox"/> OFF	

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

### Sending Email Notifications

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

The format of the email notification sent is as follows:

Subject: SUPP - notification of submitted Provider updates requiring approval.

You have requested to be notified if there are provider updates awaiting approval [and new updates have been submitted since the last email].

At [time] on [date], there are [nnn] providers awaiting approval.

[nnn] pages from [nnn] providers have been submitted since the previous update.

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

## Filtering Providers

The **Provider – Self Update** page allows SUPP Admin staff to filter Providers who are active and inactive by using the **'Show only closed Providers'** filter. By default, the screen will display:

- Active Providers
- Providers with future opening date.
- Providers who are Active with no Services.

To display a list of closed Providers, remove the tick in **'Has Changes'** and place a tick in **'Show only Closed provider'**. Click Search button.

*Note: This filter is only be available to SUPP Admin Users. SUPP Users will see only Active Providers and Services*

### Funded & Non Funded Providers

Providers who are funded or non funded can be listed by using the filters of **'Show Non-Funded Services'** and **'Show Funded Services'**. Both filters are displayed as ticked boxes by default.

Providers - Self Update					
<input type="checkbox"/>	Has Changes <input checked="" type="checkbox"/>	Show only closed providers <input type="checkbox"/>	Show funded providers <input checked="" type="checkbox"/>	Show non funded providers <input checked="" type="checkbox"/>	<input type="button" value="Search"/>
Provider Name ↕	Census Information	Email	Changes		
> Early Years Penetration Provider					

SUPP Admin staff can view a list of funded Providers by removing the tick in **'Has Changes'** and **'Show non funded providers'**. Click the search button to display the list.

**Providers - Self Update**

Has Changes  Show only closed providers  Show funded providers  Show non funded providers  Search

Provider Name	Census Information	Email	Changes
> Early Years Penetration Provider			12
> Providers			
> L Provider1			
> Provider2			
> Special School			
> Lower School			

To view both funded and non funded providers, remove the tick from the ‘**Has Changes**’ box.

The **Service – Self Update** screen have been updated to display a ‘**Funded**’ field. This shows if the Service is funded or not by displaying ‘**Yes**’ or ‘**No**’ against each service.

**Services - Self Update**

Self Update /

Service Name	Service Type	Funded ?	Start Date	End Date	FID Type	Changes	Action
> <input type="text"/>	Extended Play Group	Yes	26/03/2001		ECD		
> <input type="text"/> - Childminder	Childminder	No	28/01/2015		ECD		
> <input type="text"/> - Childminder	Childminder	No	28/01/2015		ECD		

## Managing Provider Self Updates

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

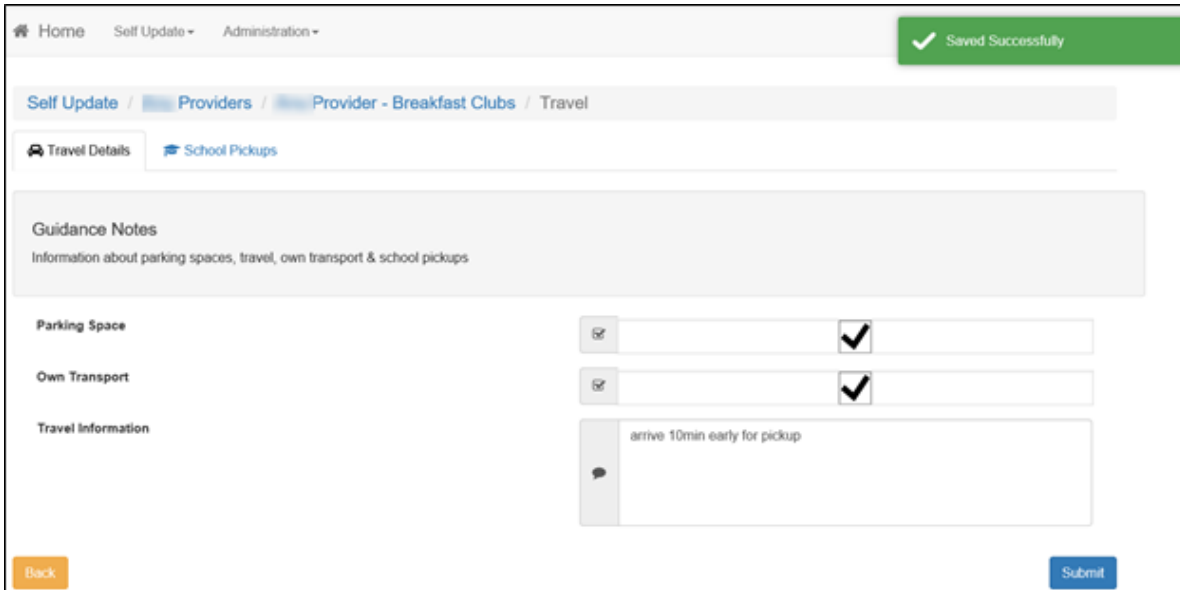
**Review Submission** is a new field added in **Self Update - General Configuration**. This allows Local Authorities to choose if a Provider submission should be automatically accepted without requiring approval.

Self Update - General Configuration	
Configuration Key	Configuration Value
Availability And Capacity	<input checked="" type="checkbox"/> ON
Consent	<input checked="" type="checkbox"/> ON
Travel	<input checked="" type="checkbox"/> ON
Costs	<input checked="" type="checkbox"/> ON
Facilities	<input checked="" type="checkbox"/> ON
Additional Information	<input checked="" type="checkbox"/> ON
Review Submissions (if set to "Off", this overrides Settings for Additional Information and Early Years Census)	<input checked="" type="checkbox"/> ON
Review Additional Information Submissions	<input checked="" type="checkbox"/> ON
Manage Additional Information	<a href="#">Manage Additional Information</a>
Show Early Years Census	<input checked="" type="checkbox"/> ON
Review Early Years Census Submissions	<input checked="" type="checkbox"/> ON

**Review Additional Information Submissions** and **Review Early Years Census Submissions** depends on **Review Submissions** settings. They can only be used when Review Submissions is switched to **ON** position. If **Review Submissions** is set to **OFF** it will override the settings in both fields to **OFF**.

Review Submissions (if set to "Off", this overrides Settings for Additional Information and Early Years Census)	<input type="checkbox"/> OFF
Review Additional Information Submissions	<input type="checkbox"/> OFF
Manage Additional Information	<a href="#">Manage Additional Information</a>
Show Early Years Census	<input checked="" type="checkbox"/> ON
Review Early Years Census Submissions	<input type="checkbox"/> OFF

For Providers' submissions to be automatically accepted, the **Review Submission** switch must be set to **OFF**. This settings prevent the **Local Authority Comment** field to be visible in the tabs of a Provider Services screen.



All changes made and submitted will not display the change (orange) icon against the tab(s) to notify a change was made. The **Change** column in the local authority **Providers – Self Update** screen will not show the change icon.

All changes made will be reflected in v4 Client.

### Generating Early Years Census

*Providers submission with automatic acceptance.*

After an Early Years Census has been generated and validated, a link will appear on the **Provider - Self update** screen. The provider can access the census via the link on the portal and proceed to make any amendment(s) as required. All changes made is reflected in v4 Client.

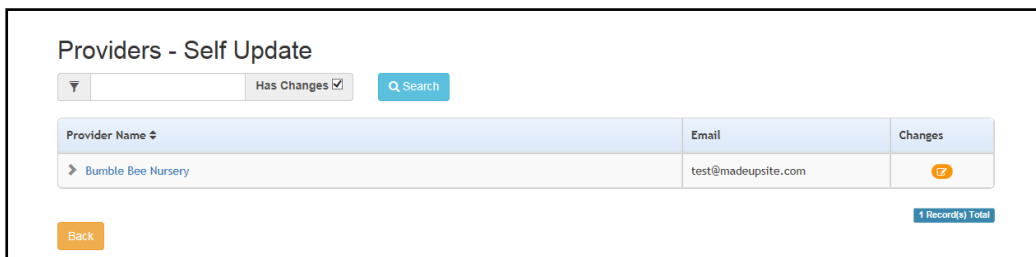
The amended census will not require approval from the local authority and will automatically be uploaded.

**Show Early Years Census** must be set to **ON** for the census link to be available on the portal.

### Viewing Provider Self Updates

To view the changes submitted by providers the **Review Submission** must be set to **ON**:

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

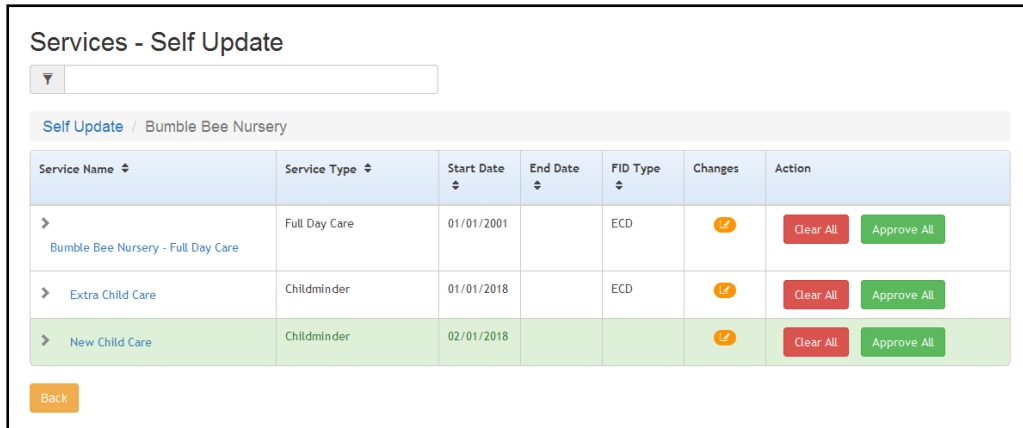


The **Has Changes** check box is automatically selected to display only the providers who have submitted changes. The **Pending changes** icon is displayed in the **Changes** column.



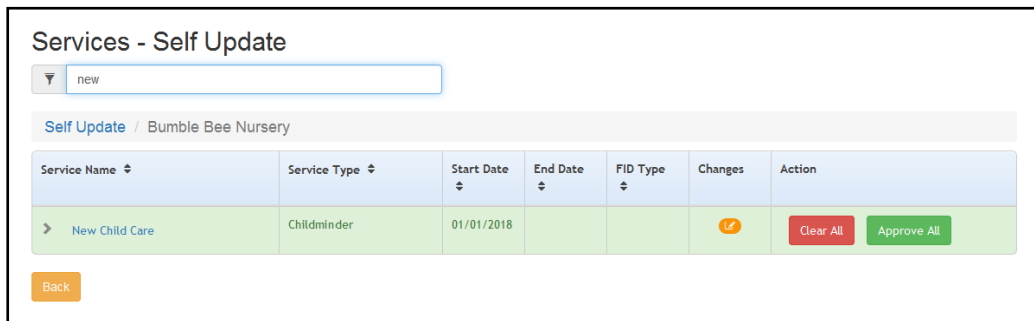
### Administering the Self Update Provider Portal

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



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

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



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

The screenshot displays the 'Consent' tab for a service named 'Bumble Bee Nursery - Full Day Care'. The interface is divided into two main sections: 'Current Values' and 'Values to be approved'. Each section contains a list of fields such as Service Name, Service Type, Start Date, End Date, Registered For Nursery Education Grant / Funding, Email Address, Web Site, Telephone Number, Fax Number, Address, Ofsted Provision Type, and Other Information. Red arrows next to the 'Current Values' fields indicate that these values are pending approval. The 'Values to be approved' section shows the provider's submitted data, with some fields highlighted in yellow to indicate changes from the current values. A 'Pending changes' icon is visible on the 'Consent' tab. At the bottom of the form, there are 'Back', 'Clear', and 'Approve' buttons.

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

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

The screenshot displays the 'Consent' tab for a service named 'Provider - manage Access'. The interface is divided into two main sections: 'Basic Details' and 'Consent'. Each section contains a list of fields such as Service Name, Service Type, Start Date, End Date, Registered For Nursery Education Grant / Funding, Email Address, Web Site, Telephone Number, Fax Number, Address, Ofsted Provision Type, and Other Information. Red arrows next to the 'Basic Details' fields indicate that these values are pending approval. The 'Consent' section shows the provider's submitted data, with some fields highlighted in yellow to indicate changes from the current values. A 'Pending changes' icon is visible on the 'Consent' tab.

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

## Administering the Self Update Provider Portal

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care

Service Details | Consent | Availability and Capacity

Guidance Notes  
Service Consent Guidance

Current Values	Values to be approved
Consent to publish details to FID <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Reason for not publishing details <input type="text"/>	<input type="text"/>
Consent to share cost details <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Consent to share telephone numbers <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Consent to share address details <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Consent to be contacted by email <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Consent to be contacted by telephone <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Consent to be contacted by post <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Signature provided <input type="checkbox"/>	<input checked="" type="checkbox"/> <input type="checkbox"/>
Comments for Local Authority <input type="text" value="None"/>	
Comments for Provider <input type="text"/>	

Back Clear Approve

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

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

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity

Opening Dates | Availability | Age Range | Capacity Details | Vacancies

Description	Start Date	End Date	Pending Change	Clear	Changes
Migrated Data	10/11/2004	10/11/2004			
Summer Holidays	18/07/2016	02/09/2016	Create	Clear All	<input checked="" type="checkbox"/>

Back

To view changes to the opening dates:

- a. Ensure that the **Opening Dates** tab is selected.
- b. Click the link on the **Description** to display the details.

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

- c. Select the required tab to view the changes.

Description	Week day	Start Time	End Time	Vacancies	Pending Change	Clear	Changes
	MON	08:00	18:00	4	Create	Clear All	

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

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

## Administering the Self Update Provider Portal

The screenshot shows the 'Availability' tab selected in the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity'. The navigation tabs are 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Guidance Notes' section contains 'Service Availability Guidance'. The main form is divided into 'Current Values' and 'Values to be approved'. Under 'Current Values', there are fields for 'Number of weeks open', 'When service is available' (set to 'None selected'), 'Comments for Local Authority' (set to 'None'), and 'Comments for Provider'. Under 'Values to be approved', there are fields for 'Number of weeks open' (set to 50) and 'When service is available' (set to 'All Year'). At the bottom, there are 'Back', 'Clear', and 'Approve' buttons.

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

The screenshot shows the 'Age Range' tab selected in the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity'. The navigation tabs are 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Guidance Notes' section contains 'Service Age Range Guidance'. The main form is divided into 'Current Values' and 'Values to be approved'. Under 'Current Values', there are fields for 'Minimum Age Years', 'Minimum Age Months', 'Maximum Age Years', 'Maximum Age Months', '2 Year Old Funding', '3 Year Old Funding', and '4 Year Old Funding'. Under 'Values to be approved', there are fields for 'Minimum Age Years' (set to 2), 'Minimum Age Months' (set to 4), 'Maximum Age Years' (set to 5), 'Maximum Age Months' (set to 0), and '2 Year Old Funding', '3 Year Old Funding', and '4 Year Old Funding' (each with a checked checkbox). At the bottom, there are 'Back', 'Clear', and 'Approve' buttons.

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

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

Age Range	Waiting List	Vacancies	Capacity	Pending Change	Clear	Changes
Age 3	5		20	Create	Clear All	

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

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

The screenshot shows the 'Vacancies' tab in the Self Update Provider Portal. The breadcrumb trail is: Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity. The 'Vacancies' tab is active. Below the breadcrumb, there are navigation icons for 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. A 'Guidance Notes' section contains 'Service Vacancy Guidance'. The main content area is divided into 'Current Values' and 'Values to be approved'. Under 'Current Values', there are three rows: 'Contact For Vacancies', 'Immediate Vacancies', and 'Waiting List', each with a slider and a red arrow button. Under 'Values to be approved', there are three rows corresponding to the same categories, each with a checkbox, a checkmark, and a red arrow button. Below this are two text input fields: 'Comments for Local Authority' (containing 'None') and 'Comments for Provider'. At the bottom, there are 'Back', 'Clear', and 'Approve' buttons.

## Approving Provider Updates

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

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the registered email addresses of all Provider portal users who have made a submission. The From email address for the email is set via **The self update email address** option. For more information, see [Configuring the Self Update Portal](#) on page 19.

The email contains the following information:

Your request to [Create/Update/Delete] [Submission area e.g. Consent] for [Service name] at [Provider name] has been reviewed.

[Comments for Provider]

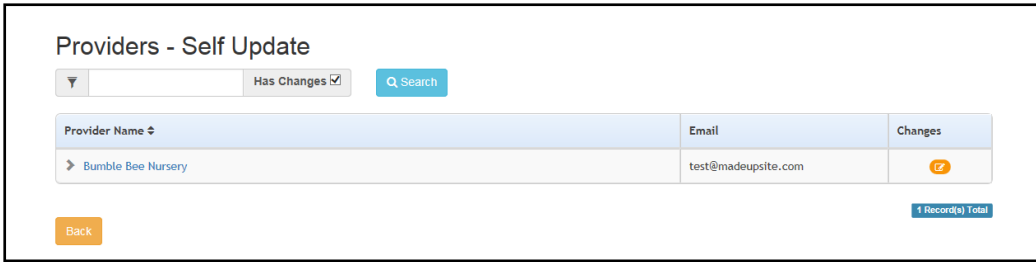
To view the information held [Service name] at [Provider name], please visit Self Update on the Provider Portal.

**NOTE:** The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the **Self Update On Approve Email Template** page via **Provider Portal | Administration | Site Setup | Message Templates**. For more information, see [Message Templates](#) on page 8.

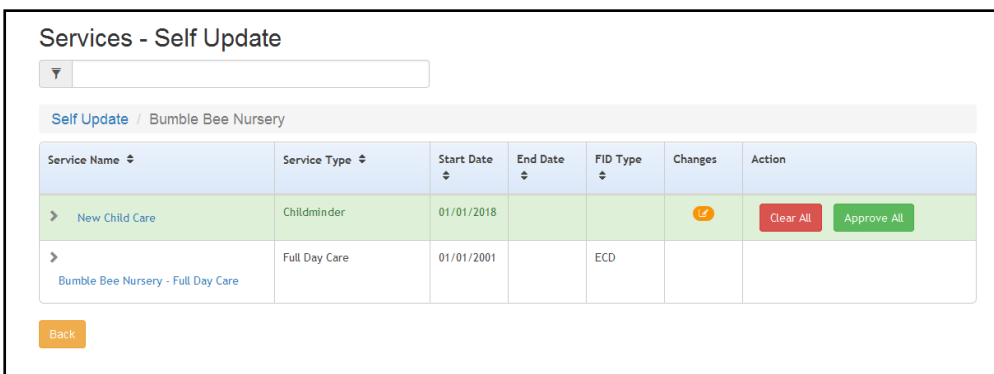
## Approving All Changes

To approve all changes for a service:

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



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



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

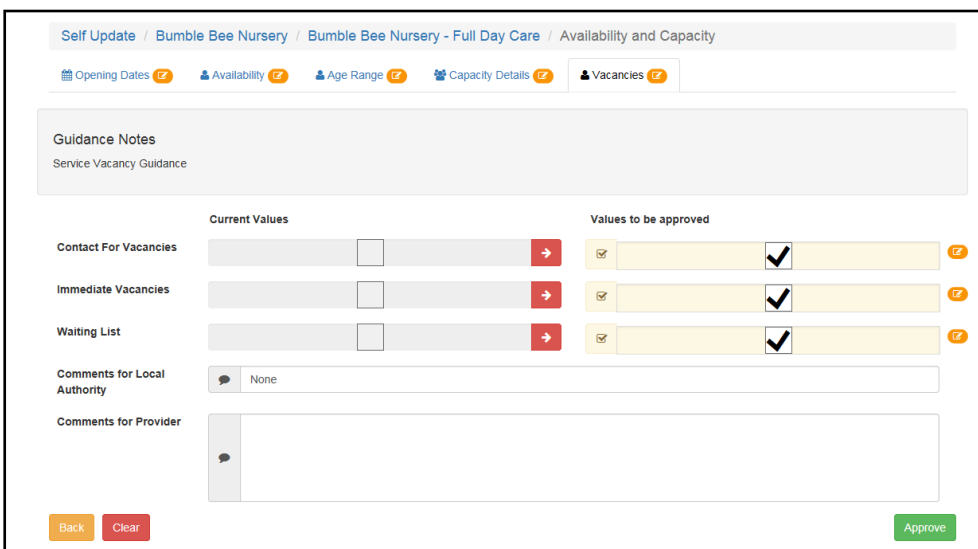
## Approving Individual Changes

To approve the changes made on each tab page individually:

1. View the updates submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 27.

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

2. Select the required tab.





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

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

3. If required, click the arrow adjacent to the **Current Value** to overwrite one or more changes with the current value in the One database. For more information, see [Overwriting Provider Updates](#) on page 36.
4. To approve the changes and update the value in the One database, click the **Approve** button.

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

## Overwriting Provider Updates

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

To overwrite provider updates:

1. View the changes submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 27.

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity / Summer

Opening Dates Opening Times Opening Times Exceptions

Guidance Notes  
Service Opening Dates Guidance

	Current Values	Values to be approved
Description *	<input type="text"/>	<input type="text" value="Summer"/>
Start Date *	<input type="text"/>	<input type="text" value="24/07/2017"/>
End Date	<input type="text"/>	<input type="text" value="25/08/2017"/>
Comments for Local Authority	<input type="text" value="None"/>	
Comments for Provider	<input type="text"/>	

2. Click the arrow adjacent to the **Current Value** to overwrite the value in the **Value to be approved** column.  
Alternatively, to clear all changes on the tab, click the **Clear All** button.
3. To approve the remaining changes, if any, click the **Approve** button.

## Editing Provider Updates

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

1. View the updates submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 27.

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

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

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

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

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

## Rejecting Provider Updates

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

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

The **Has Changes** check box is automatically selected to display only the providers who have submitted changes.

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

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
Bumble Bee Nursery - Full Day Care	Full Day Care	01/01/2001		ECD	L	Clear All Approve All
Extra Child Care	Childminder	01/01/2018		ECD	L	Clear All Approve All
New Child Care	Childminder	02/01/2018			L	Clear All Approve All

The **Pending changes** icon is displayed in the **Changes** column and the **Clear All** button is displayed in the **Action** column if there are pending changes for this service.

5. To reject all the proposed changes for this service, click the **Clear All** button.

Alternatively, to reject proposed changes on a particular tab:

- a. Click the **Service Name** link to display the details.
- b. Select the required tab.

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Guidance Notes  
Service Vacancy Guidance

Current Values Values to be approved

Contact For Vacancies

Immediate Vacancies

Waiting List

Comments for Local Authority

Comments for Provider

Back Clear Approve

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

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Guidance Notes  
Service Vacancy Guidance

Current Values Values to be approved

Contact For Vacancies

Immediate Vacancies

Waiting List

Comments for Local Authority

Comments for Provider

Back Approve

## Managing and Configuring File Upload

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

Provider File Upload Configuration And Management

Configuration Key	Configuration Value	▲
File Upload Tab	<input checked="" type="checkbox"/>	
Comma separated list of file extensions accepted for upload	<input type="text" value="pdf,doc,docx,xml,pdf,png,sql,txt"/>	
Maximum number of files allowed per submission	<input type="text" value="2"/>	
Provider can delete uploaded files	<input checked="" type="checkbox"/>	

Cancel Save View/Manage Ad Hoc Uploaded Files

1 new files uploaded since page last accessed

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

These values can be set as follow:

### **File Upload Tab**

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

### **Comma Separated List**

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

### **Maximum Number of Files per submission**

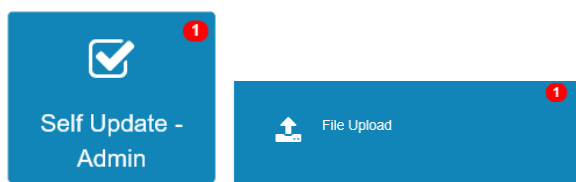
- The maximum value that can be set is 1 - 5.

### **Provider can delete uploaded files**

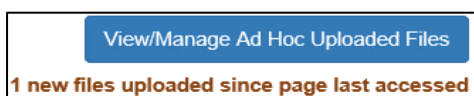
- ON = Provider is given the option to delete uploaded files
- OFF = The Delete option will not be visible to the Provider on the *'Files previously uploaded to the LA' screen.*

## **Managing Providers Uploaded Files**

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



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



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

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

Service Name	File Description	Date	Status	Actions
Early Years Breakfast Club		13/09/2019	Deleted By LA	View Note
Early Years Breakfast Club		16/09/2019	Deleted By Provider	View Note
Early Years Breakfast Club		17/09/2019	Document Uploaded	View, View Note, Link, Delete
Early Years Penetration Dawn til Dusk		12/09/2019	Deleted By LA	View Note
Early Years Penetration Dawn til Dusk		12/09/2019	Unlinked Document	View, View Note, Link, Delete
Early Years Penetration Dawn til Dusk		13/09/2019	Linked Document	View, View Note, Remove Link, Delete

The information that appears in each column are detailed below:

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

**File Description:** A description of the file sent.

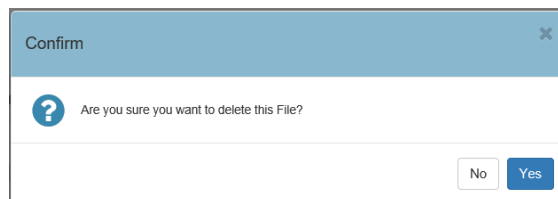
**Date:** Date the LA received the File.

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

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

**Actions.** There are 5 actions as follow:

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



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

## Sending Messages

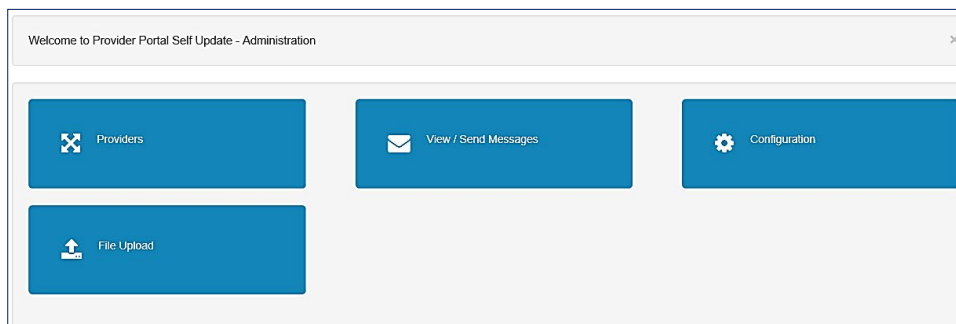
### Introduction

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

**NOTE:** A reminder message can be sent to providers who have not submitted their census information. If the local authority has configured the portal so that **Show Early Years Census** is set to **ON**, you can filter the list of providers to display only those that have or have not submitted their census.

For more information about configuring the Self Update portal, see [Configuring the Self Update Portal](#) on page 19.

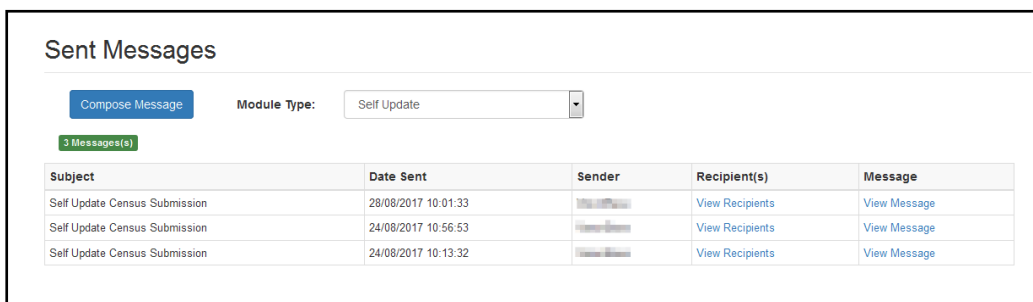
The **View / Send Messages** tile is displayed on the Self Update Administration welcome page.



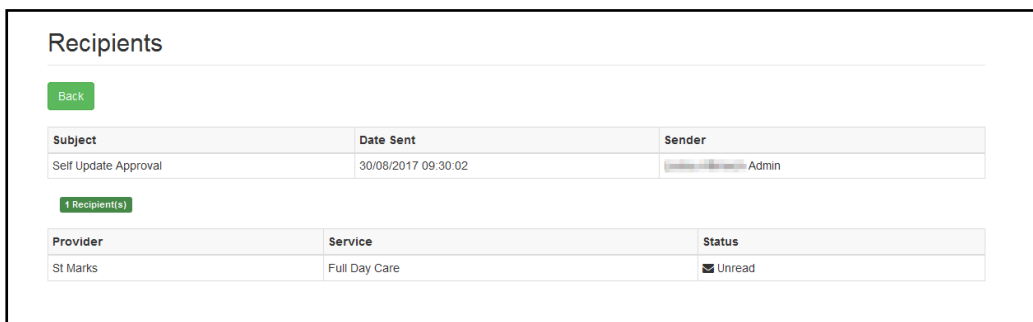
### Viewing Sent Messages

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

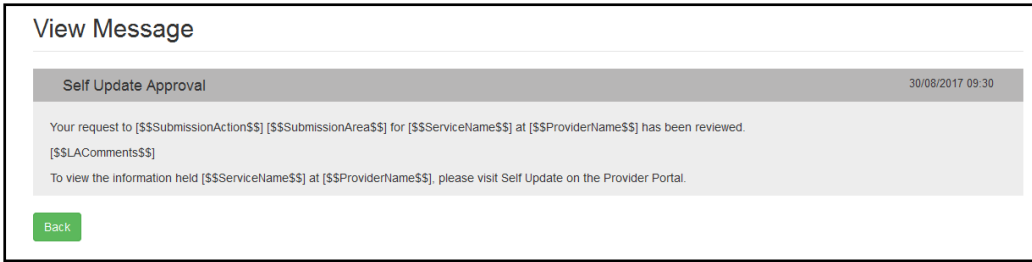
1. Select **Messages** from the **Self Update** menu to display the **Sent Messages** page. The **Module Type** drop-down defaults to **Self Update**.



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



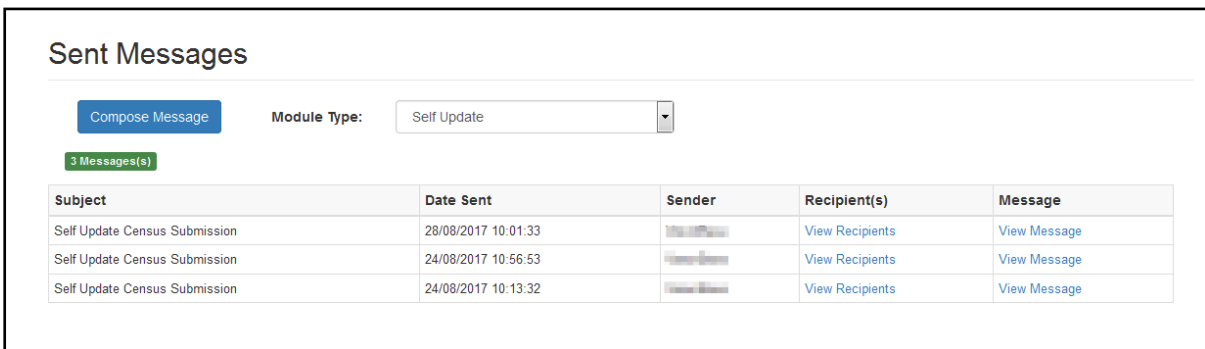
Alternatively, to view the recipients of a message, click the **View Recipients** link to display the **Recipients** page.



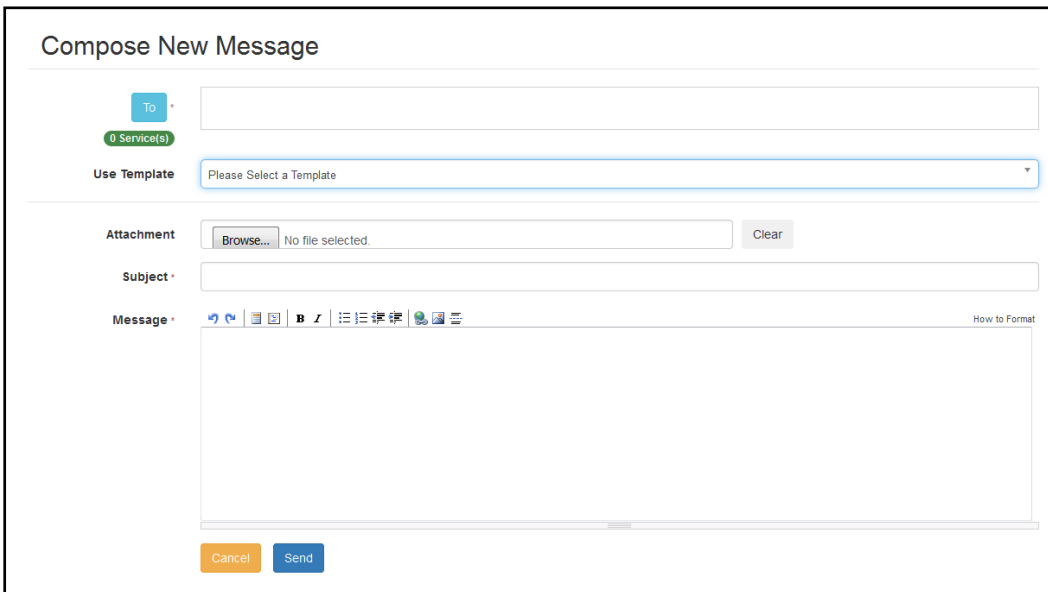
## Composing a New Message

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

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



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



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



## Administering the Self Update Provider Portal

### Select Message Recipients

Name

**Search Results**  
0 Service(s)

Provider	Service	EY Census Submitted	Funding Type	Service Type
		Please select	Please select	Please select

There are no results to display.

**Selected Services**  
0 Service(s)

There are no selected services.

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

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

### Select Message Recipients

Name   Page 1 of 111

**Search Results**  
1104 Service(s)

Provider	Service	EY Census Submitted	Funding Type	Service Type
<input type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Provider Service	No <input type="button" value="X"/>	Please select
<input type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Service2	No	Funded (T)
<input type="checkbox"/>	ARCDEL Provider2	ARCDEL Service1	No	Funded (T)
<input type="checkbox"/>	Broadmead Lower School	Maintained Nursery Schools/Cla	No	Funded (T)
<input type="checkbox"/>	Carealot Day Nursery	Weekend Nursery school	No	Funded (T)
<input type="checkbox"/>	Church End Lower School	Full Day Care	No	Funded (T)
<input type="checkbox"/>	Deborah Green Childcare	Dawn til Dusk	No	Funded (T)
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1343]	No	Funded (T)
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1344]	No	Funded (T)
<input type="checkbox"/>	EY_BASE[9646]	EY_SERVICE[2696]	No	Funded (T)

**Selected Services**  
0 Service(s)

There are no selected services.

**NOTES:** To send a reminder message to providers who have not submitted their census, select all services for that provider.

If the provider clicks the **No Changes Required** button, the **EY Census Submitted** status is set to **Yes**.

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

### Select Message Recipients

Name   Page 1 of 111 [1](#) [2](#) [3](#) [4](#) [5](#) [> 111](#) [Next >>](#)

**Search Results**  
1104 Service(s)

<input type="checkbox"/>	Provider	Service	EY Census Submitted	Funding Type	Service Type
<input checked="" type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Provider Service	No	Funded (T)	Childminder
<input checked="" type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Service2	No	Funded (T)	Combined Nursery Centre
<input checked="" type="checkbox"/>	ARCDEL Provider2	ARCDEL Service1	No	Funded (T)	Breakfast Clubs
<input type="checkbox"/>	Broadmead Lower School	Maintained Nursery Schools/Cla	No	Funded (T)	Maintained Nursery Schools/Cla
<input type="checkbox"/>	Carealot Day Nursery	Weekend Nursery school	No	Funded (T)	Private Nursery School
<input type="checkbox"/>	Church End Lower School	Full Day Care	No	Funded (T)	Full Day Care
<input type="checkbox"/>	Deborah Green Childcare	Dawn til Dusk	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1343]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1344]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9646]	EY_SERVICE[2696]	No	Funded (T)	Childminder

**Selected Services**  
3 Service(s)

ARCDEL Provider2 - ARCDL Service1    ARCDEL Provider1 - ARCDL INTG Service2    ARCDEL Provider1 - ARCDL INTG Provider Service

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

### Compose New Message

**To**    
3 Service(s)

**Use Template**

**Attachment**  No file selected.

**Subject**

**Message**  How to Format

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

## Administering the Self Update Provider Portal

### Compose New Message

**To** ARCDEL Provider1 - ARCDL INTG Provider Service ARCDEL Provider1 - ARCDL INTG Service2 ARCDEL Provider2 - ARCDL Service1

**Use Template** Self Update On Census Approve Email Template

**Attachment** Browse... No file selected. Clear

**Subject** Self Update Approval For Census

**Message**

Your request to [\$\$\$SubmissionAction\$\$\$] [\$\$\$SubmissionArea\$\$\$] at [\$\$\$ProviderName\$\$\$] has been reviewed.

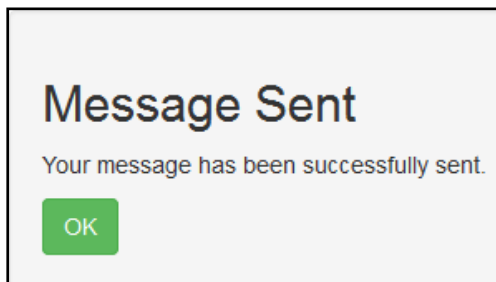
[\$\$\$LAComments\$\$\$]

To view the information held at [\$\$\$ProviderName\$\$\$], please visit Self Update on the Provider Portal.

Your request to [\$\$\$SubmissionAction\$\$\$] [\$\$\$SubmissionArea\$\$\$] at [\$\$\$ProviderName\$\$\$] has been reviewed.  
[\$\$\$LAComments\$\$\$]  
To view the information held at [\$\$\$ProviderName\$\$\$], please visit Self Update on the Provider Portal.

Cancel
Send

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



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

### Sent Messages

Compose Message    **Module Type:** Self Update

4 Messages(s)

Subject	Date Sent	Sender	Recipient(s)	Message
Self Update Approval	30/08/2017 09:30:02	Admin	<a href="#">View Recipients</a>	<a href="#">View Message</a>
Self Update Census Submission	28/08/2017 10:01:33		<a href="#">View Recipients</a>	<a href="#">View Message</a>
Self Update Census Submission	24/08/2017 10:56:53		<a href="#">View Recipients</a>	<a href="#">View Message</a>
Self Update Census Submission	24/08/2017 10:13:32		<a href="#">View Recipients</a>	<a href="#">View Message</a>

# 05 | Using the Self Update Provider Portal

## Introduction

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

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

## Activating a Portal User Account

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

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

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

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

### More Information:

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

## Logging into the Portal

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

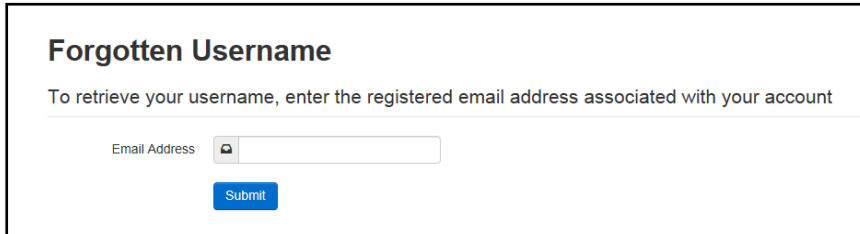
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

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

## Retrieving Your User Name

If you forget your user name:

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

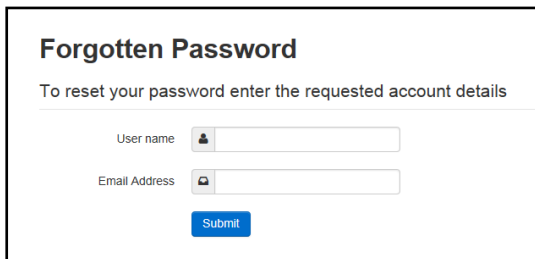


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

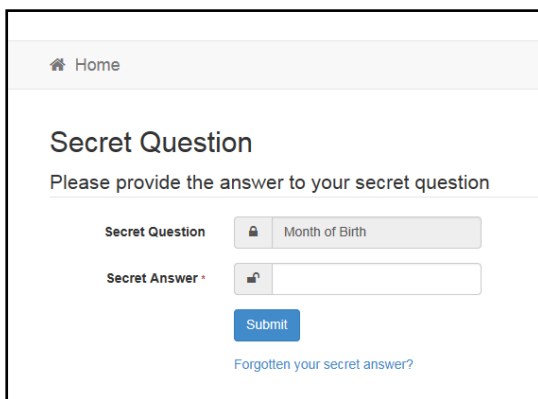
## Resetting Your Portal Password

To reset your password:

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



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

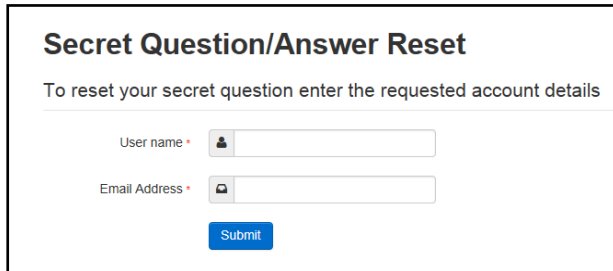


4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

## Resetting Your Secret Question

If you need to reset your secret question:

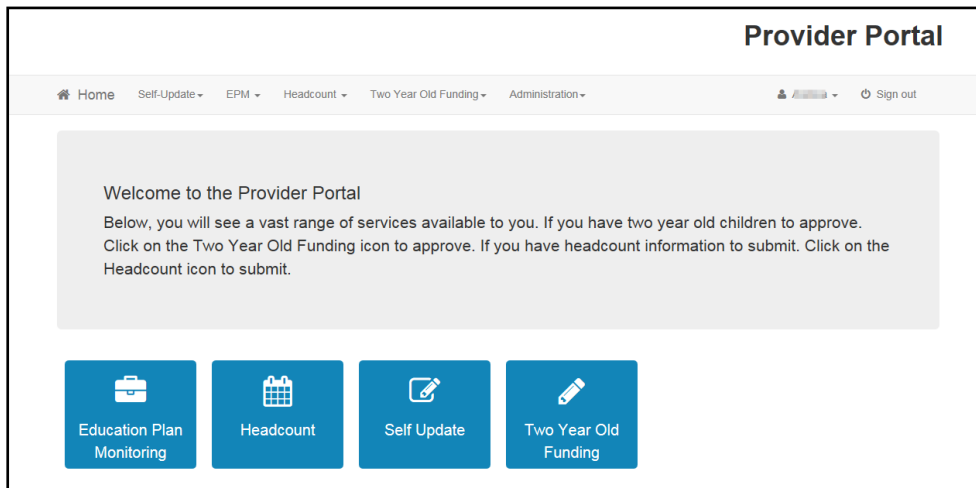
1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.



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

## Accessing the Self Update Portal

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



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

## Setting Up Two Step Verification

### Introduction

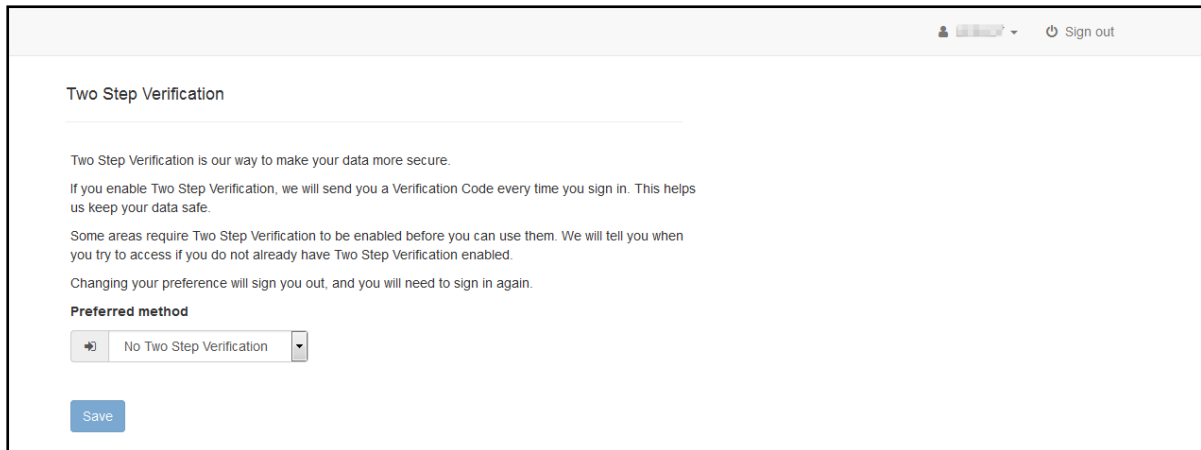
If two step verification is enabled, you will be sent a verification code every time you sign in.

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

### Enabling Two Step Verification

To enable two step verification:

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



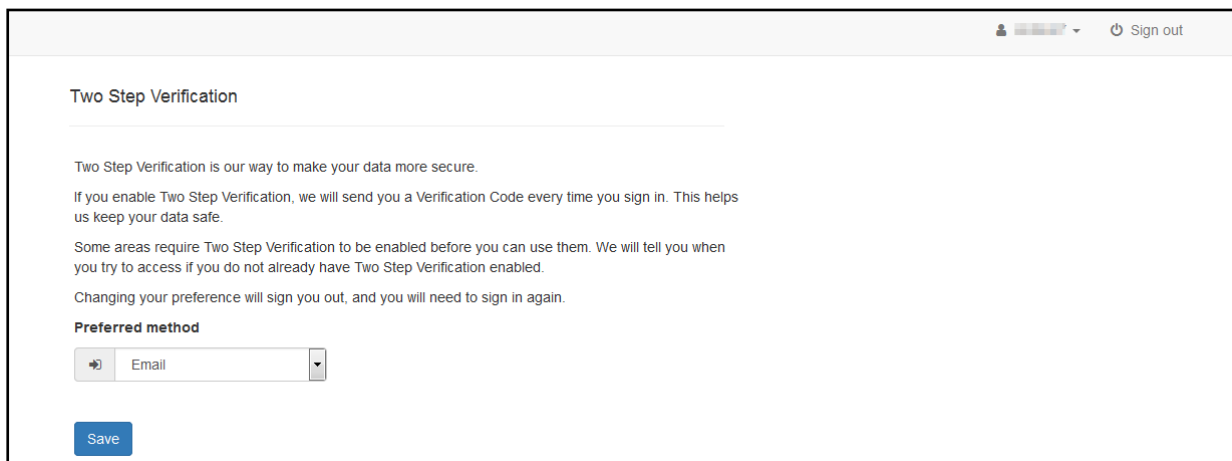
The screenshot shows the 'Two Step Verification' settings page. At the top right, there is a user profile icon and a 'Sign out' button. The main heading is 'Two Step Verification'. Below it, there is a horizontal line. The text explains that Two Step Verification is for security and that a verification code will be sent upon login. It also notes that some areas require it to be enabled and that changing preferences will sign the user out. Under the heading 'Preferred method', there is a dropdown menu currently set to 'No Two Step Verification'. A 'Save' button is located at the bottom left of the form area.

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

### Disabling Two Step Verification

To disable two step verification:

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



The screenshot shows the 'Two Step Verification' settings page, identical in layout to the previous one. However, the 'Preferred method' dropdown menu is now set to 'Email'. The 'Save' button remains at the bottom left.

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

## Viewing and Updating Census Details

### Introduction

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

**NOTE:** For the provider to enter and update the census details, the Local Authority must set the **Show Early Years Census** configuration value to **On** via the configuration screen. For more information, see [Configuring the Self Update Portal](#) on page 19.

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

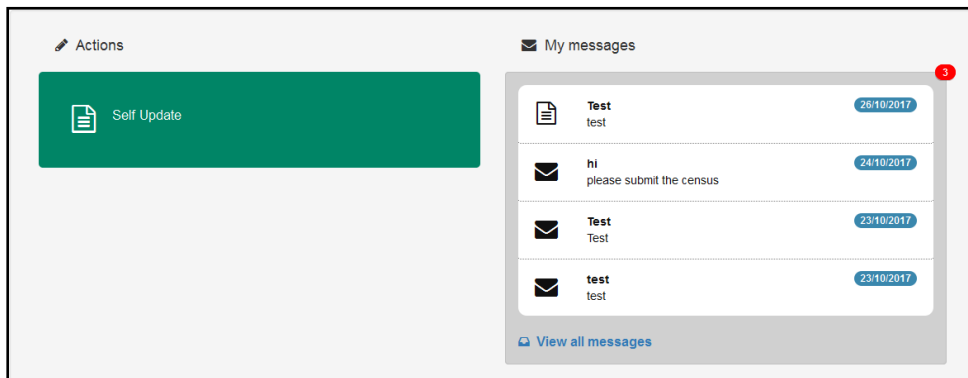
**More Information:** *Early Years Census Return* reference guide available on the [One Publications](#) website.

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

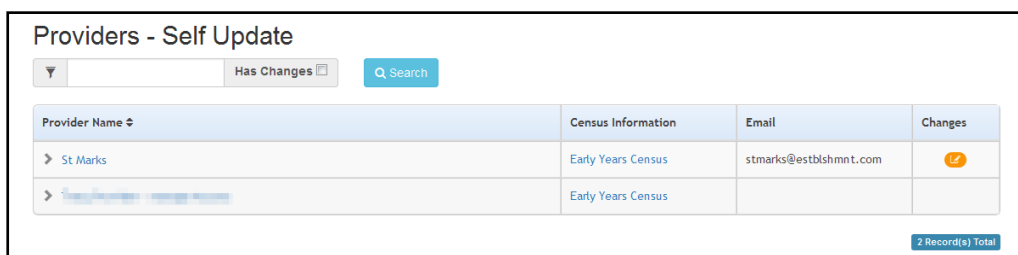
- Availability and opening hours.
- Staff summary details - the number of staff with particular qualifications.
- Summary of children in funded places for each age group.

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

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



2. Select the **Self Update** action to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see [Managing User Accounts](#) on page 9.



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



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

The screenshot shows the 'Self Update' interface for 'St Marks' under the 'Early Years Census' section. The page is divided into four main sections:

- Guidance Notes:** 'Early Years Census 2018 Details'.
- Availability and Opening Times:** Fields for 'No. of Funding Weeks' (38), 'No. of Weeks Open' (50), and opening/closing times for Monday through Sunday. A 'Continuously Open' checkbox is also present.
- Total Staff Information:** Fields for 'Total Number of Staff' (1), 'Level 2 Qualification' (0), 'Level 3 Qualification - Non-managerial' (0), 'Level 3 Qualification - Managerial' (0), 'Qualified Teacher Status' (1), 'Early Years Professional Status' (0), and 'Early Years Teacher Status' (0).
- Number of Children By Age:** Fields for 'Number of 2 year olds' (3), 'Number of 3 year olds' (4), and 'Number of 4 year olds' (2). A 'Comments for Local Authority' text area is also included.

At the bottom of the form, there are four buttons: 'Back' (orange), 'No Changes Required' (green), 'Save Draft' (green), and 'Submit' (blue).

5. If required, update the census details.  
Alternatively, if no changes are required:
  - a. Click the **No Changes Required** button.
  - b. Click the **Yes** button to confirm.
6. To save the changes without submitting them, click the **Save Draft** button to display the **Providers - Self Update** page with an icon in the **Census Information** column to indicate that the census has been updated but not submitted, as shown in the following graphic:

Providers - Self Update

Has Changes  Search

Provider Name	Census Information	Email	Changes
Therapy Foundation - Therapy Foundation	Early Years Census		🔔
St Marks	Early Years Census <span style="color: red;">🔔</span>	stmarks@estblshmnt.com	

2 Record(s) Total

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

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

**NOTES:** If the provider selects (ticks) the **Continuously Open** check box, any opening and closing times entered are cleared and the fields are disabled.

When the provider clicks the **Yes** button to confirm the changes, if the configuration value for **Review Early Years Census Submissions** is set to **On**, the pending changes icon is displayed on the **Providers - Self Update** page and the Local Authority needs to approve the changes. If the configuration value is set to **Off**, the changes are immediately saved in the database.

The provider can make changes to the census details after submitting them as long as the census window is still open (**Show Early Years Census** configuration value is set to **On**).

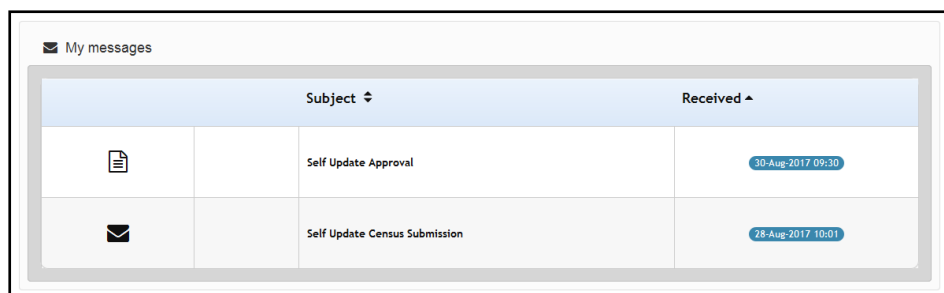
For more information, see [Configuring the Self Update Portal](#) on page 19.

## Viewing Sent Messages

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

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

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



If required, click a heading to sort the list.

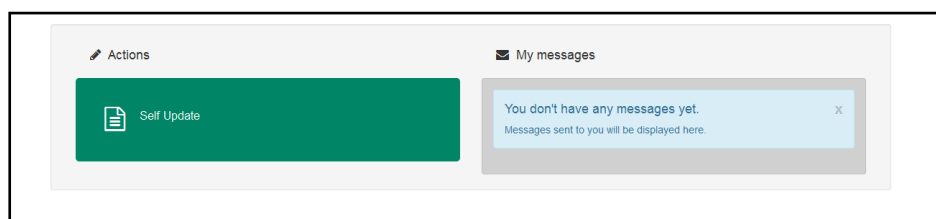
## Viewing Service Details

Providers can use the Self Update portal to view the details held about their services. The Local Authority can use the Self Update Configuration page to determine which information is displayed. For more information, see [Configuring the Self Update Portal](#) on page 19.

## Viewing Providers and Services

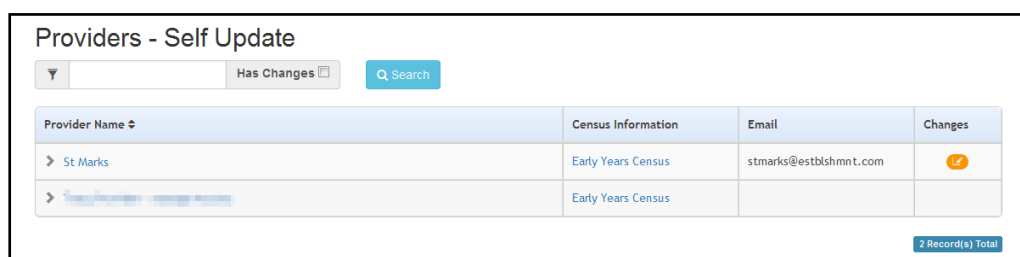
To view the details currently held about your provider services:

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



2. Select the **Self Update** tile to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see [Managing User Accounts](#) on page 9.

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



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

## Services - Self Update

Self Update /

Service Name	Service Type	Funded ?	Start Date	End Date	FID Type	Changes	Action
> [Redacted]	Childminder	Yes	01/07/2012		ECD		
> [Redacted]	Combined Nursery Centre	Yes	01/07/2012		ECD		

Back
Add Service

**NOTE:** If the required service is not listed, it can be added by clicking the **Add Service** button. For more information, see [Adding a Service](#) on page 86.

## File Upload to Local Authority

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

The file(s) are uploaded as follow:

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

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

### Ad Hoc File Upload

(Please remember to "submit" when you have completed your file uploads)

Self Update / Early Years Penetration Provider / Early Years Breakfast Club

Service Details
Consent
Availability and Capacity
Travel
Costs
Facilities
Additional Information
File Upload

Add File

Submit
Cancel

List ad hoc files previously uploaded

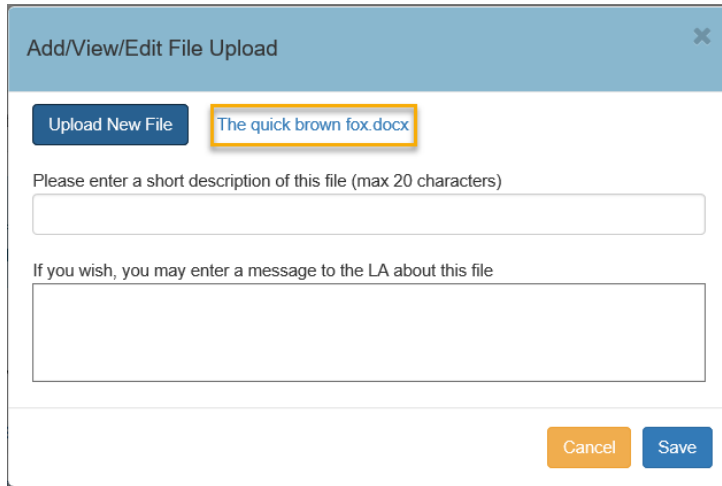
A notification is displayed at the top of the screen to the Providers which states as follow:

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

## Sending Ad Hoc Files

The Provider can send the Ad hoc files as follow:

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



Add/View/Edit File Upload

Upload New File The quick brown fox.docx

Please enter a short description of this file (max 20 characters)

If you wish, you may enter a message to the LA about this file

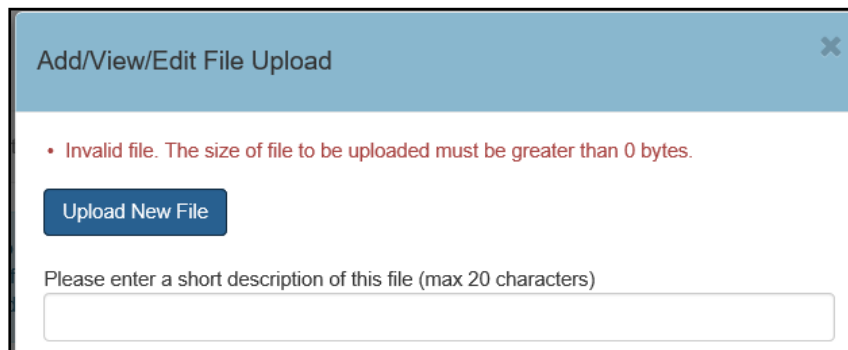
Cancel Save

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

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

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

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



Add/View/Edit File Upload

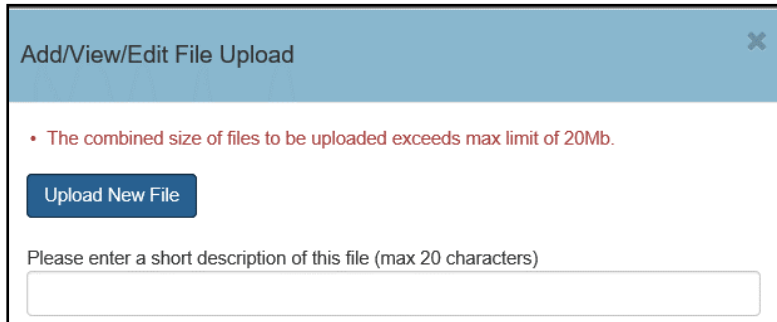
- Invalid file. The size of file to be uploaded must be greater than 0 bytes.

Upload New File

Please enter a short description of this file (max 20 characters)

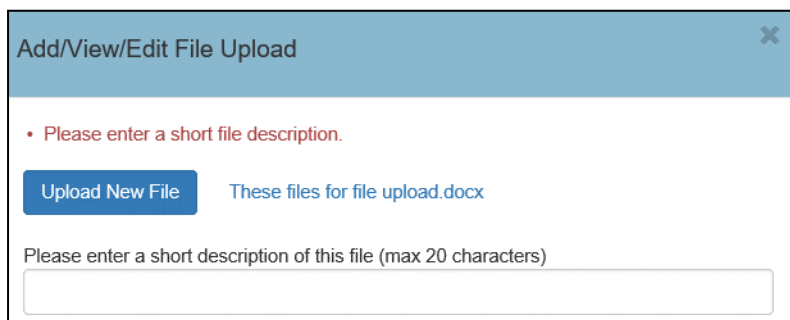
- If the file is 20Mb the following message will appear

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

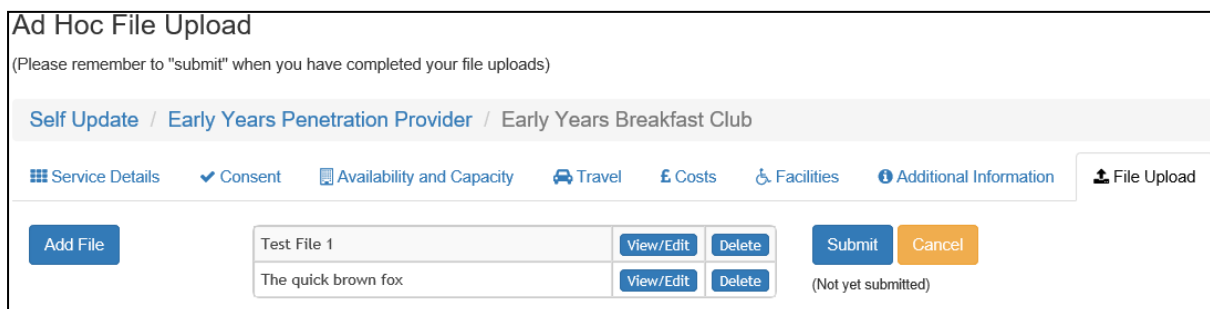


3. A description of the file to be sent must be entered. If this is left blank the following message will appear.

*'Please enter a short file description'*



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



5. The file(s) can be **View/Edit** before being Submitted. The Delete and Cancel button will remove the selected file for uploading.
6. Click the **Submit** button to Upload the file. A confirmation message will be displayed as shown below.



## Managing Uploaded Files

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

Date ^	File Description	Note to LA	Status	Actions
17/09/2019	[REDACTED]		Document Uploaded	<a href="#">View</a> <a href="#">Delete</a>
17/09/2019	[REDACTED]		Document Uploaded	<a href="#">View</a> <a href="#">Delete</a>
16/09/2019	[REDACTED]	[REDACTED]	Deleted By Provider	
13/09/2019	[REDACTED]	[REDACTED]	Deleted By LA	
13/09/2019	[REDACTED]	[REDACTED]	Linked Document	<a href="#">View</a> <a href="#">Delete</a>
13/09/2019	[REDACTED]	[REDACTED]	Deleted By LA	
12/09/2019	[REDACTED]	[REDACTED]	Unlinked Document	<a href="#">View</a> <a href="#">Delete</a>

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

**Date:** Date the Uploaded file was sent to LA

**File Description:** Description of the file sent

**Note to LA:** The message that was sent to the LA with the Uploaded

**Status:** This shows the latest status of the file.  
(Note: This is the same Status stages as shown on LA screen)

**Action:**

**View:** The Provider can view the file that was uploaded

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

## Viewing Service and Consent Details

**NOTE:** The **Consent** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 19.

To view service and consent details for a provider:

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54
2. Click the link for the required service to display the **Service Details** tab.

The screenshot displays the 'Service Details' page in the Self Update Provider Portal. The breadcrumb trail at the top reads 'Self Update / Provider - manage Access / Service 2'. Below this, a navigation bar includes tabs for 'Service Details' (selected), 'Consent', 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The main content area is titled 'Guidance Notes' and 'Service Guidance'. The form fields are as follows:

- Service Name:** Service 2
- Service Type:** Maintained Nursery Schools/Cla
- Start Date:** 04/01/2016
- End Date:** (empty)
- Registered For Nursery Education Grant / Funding:** (checked)
- Email Address:** (empty)
- Web Site:** (empty)
- Telephone Number:** (empty)
- Fax Number:** (empty)
- Address:** (empty) with a location search dropdown showing 'Haringey, Haringey, UK' and a 'Select' button.
- Ofsted Provision Type:** (empty)
- Offers Extended Childcare:** (checked)
- Details of your 30 hours offer:** (empty text area)
- Other Information:** (empty text area)
- Comments for Local Authority:** (empty text area)

At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

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



## Using the Self Update Provider Portal

The screenshot shows the 'Self Update' portal interface. At the top, there is a breadcrumb trail: 'Self Update / Provider - manage Access / Service 2'. Below this is a navigation menu with tabs: 'Service Details', 'Consent' (selected), 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The main content area is titled 'Guidance Notes' and 'Service Consent Guidance'. It contains several consent checkboxes, each with a corresponding input field: 'Consent to publish details to FID', 'Reason for not publishing details' (with a dropdown menu), 'Consent to share cost details', 'Consent to share telephone numbers', 'Consent to share address details', 'Consent to be contacted by email', 'Consent to be contacted by telephone', 'Consent to be contacted by post', 'Signature provided', and 'Comments for Local Authority' (with a text area). At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

## Viewing Availability and Capacity

**NOTE:** The **Availability and Capacity** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 19.

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 59

The screenshot shows the 'Self Update' portal interface for 'St Marks - Full Day Care'. The breadcrumb trail is 'Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity'. The navigation menu includes 'Opening Dates', 'Availability' (selected), 'Age Range', 'Capacity Details', and 'Vacancies'. Below the menu is a table with the following data:

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			

At the bottom left is a 'Back' button and at the bottom right is an 'Add Opening Date' button.

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

For more information, see [Viewing Opening Dates, Times and Exceptions](#) on page 63.

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

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

## Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability **Age Range** Capacity Details Vacancies

Guidance Notes  
Service Age Range Guidance

Minimum Age Years

Minimum Age Months

Maximum Age Years

Maximum Age Months

2 Year Old Funding

3 Year Old Funding

4 Year Old Funding

Comments for Local Authority

[Back](#) [Submit](#)

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

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range **Capacity Details** Vacancies

Guidance Notes  
Service Capacity Guidance

Capacity Date

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 1	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 2	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 3	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 4	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 5	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 6	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 7	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 8	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	

Comments for Local Authority

[Add Age Range](#)

[Back](#) [Submit](#)

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

## Viewing Opening Dates, Times and Exceptions

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 59

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			

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

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

## Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / Full Day Care

Opening Dates | **Opening Times** | Opening Times Exceptions

Description	Week day	Start Time	End Time	Vacancies	Pending Change	Clear	Changes
	MON	08:30	12:30	12			
	MON	14:00	17:30	12			
	TUE	08:30	12:30	12			
	TUE	14:00	17:30	12			
	WED	08:30	12:30	12			
	WED	14:00	17:30	12			
	THU	08:30	12:30	12			
	THU	14:00	17:30	12			
	FRI	08:30	12:30	12			
	FRI	14:00	17:30	12			

Back Add Opening Time

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

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / Full Day Care

Opening Dates | Opening Times | **Opening Times Exceptions**

Description	Week day	Start Date	End Date	Start Time	End Time	Pending Change	Clear	Changes
-------------	----------	------------	----------	------------	----------	----------------	-------	---------

Back Add Opening Time Exception

## Viewing Travel, Costs and Facilities

**NOTE:** The **Travel, Costs and Facilities** tabs are only displayed if the Local Authority has set the **Configuration Value to On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 19.

- View the basic details for the service. For more information, see [Viewing Service and Consent Details](#) on page 59
- To view details about parking, own transport and travel information, select the **Travel** tab and ensure that the **Travel Details** sub tab is selected.

Self Update / St Marks / St Marks - Full Day Care / Travel

Travel Details | School Pickups

**Guidance Notes**  
Information about parking spaces, travel, own transport & school pickups

Parking Space

Own Transport

Travel Information

Comments for Local Authority

Back Submit

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

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

- To view details of costs and **Sibling Discount**:

- Select the **Costs** tab.
- Select the **Cost Details** sub tab.

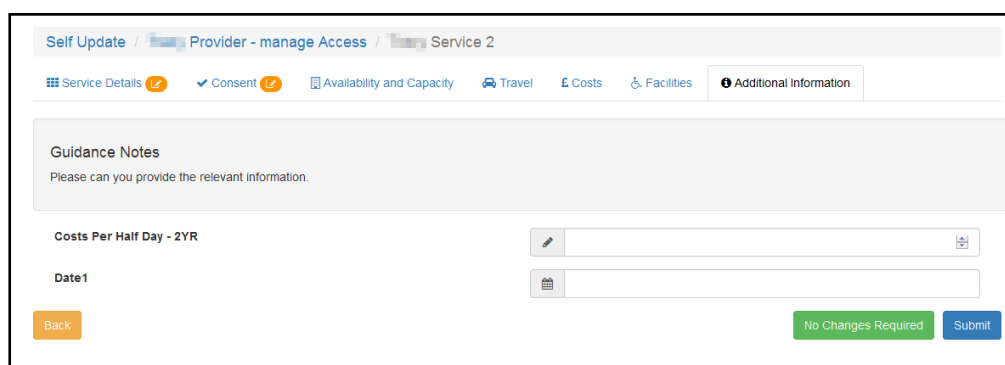
- To view details of the facilities supported by the provider, select the **Facilities** tab.

## Viewing Additional Information

**NOTE:** The **Additional Information** tab is only displayed if the Local Authority has set the **Configuration Value** to **ON** via the **Configuration** page. The Local Authority configures the Self Update portal to determine which of the additional information to display to providers. For more information, see [Configuring the Self Update Portal](#) on page 19.

To view additional information for a provider:

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Additional Information** tab to display any additional information defined for the service.



The screenshot shows a web interface for 'Service 2' under 'Provider - manage Access'. The 'Additional Information' tab is active. It features a 'Guidance Notes' section with the text 'Please can you provide the relevant information.' Below this are two input fields: 'Costs Per Half Day - 2YR' and 'Date 1'. At the bottom, there are three buttons: 'Back' (orange), 'No Changes Required' (green), and 'Submit' (blue).

## Updating Service Details

### Introduction

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

The Local Authority administrator uses the **Self Update - General Configuration** page to determine which information can be updated. For more information, see [Configuring the Self Update Portal](#) on page 19.

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the specified email address whenever a provider submits a change. The Self Update portal sends the email using the details in **The self update email address** option as the **From** address. For more information, see [Configuring the Self Update Portal](#) on page 19.

The email contains the following information:

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

[Comments for Local Authority]

Services can be accessed through Self Update.

**NOTE:** The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the **Self Update On Submit Email Template** page via **Provider Portal | Administration | Site Setup | Message Templates**. For more information, see [Message Templates](#) on page 8.

## Updating Service Basic Details

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

1. View the service details. For more information, see [Viewing Service and Consent Details](#) on page 59

The screenshot shows the 'Service Details' form in the Self Update Provider Portal. The breadcrumb trail is 'Self Update / Provider - manage Access / Service 2'. The navigation menu includes 'Service Details', 'Consent', 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The form is titled 'Guidance Notes' and 'Service Guidance'. It contains the following fields and options:

- Service Name:** Text input field with 'Service 2' and an edit icon.
- Service Type:** Dropdown menu with 'Maintained Nursery Schools/Cla' selected.
- Start Date:** Date picker with '04/01/2016' selected.
- End Date:** Date picker field.
- Registered For Nursery Education Grant / Funding:** Checkboxes, both checked.
- Email Address:** Text input field with an edit icon.
- Web Site:** Text input field with an edit icon.
- Telephone Number:** Text input field with an edit icon.
- Fax Number:** Text input field with an edit icon.
- Address:** Address search field with 'Bury Hill, UK' and a 'Select' button.
- Ofsted Provision Type:** Text input field with an edit icon.
- Offers Extended Childcare:** Checkboxes, both checked.
- Details of your 30 hours offer:** Text area with a speech bubble icon.
- Other Information:** Text area with a speech bubble icon.
- Comments for Local Authority:** Text area with a speech bubble icon.

At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

2. Make one or more changes to the **Service Details**:
  - a. Enter a **Service Name**, **Start Date** or **End Date**.
  - b. Select a **Service Type** (*Table ID: 0423*).
  - c. Enter one or more of the following contact information:
    - **Email Address**
    - **Web Site** address
    - **Telephone Number**
    - **Fax Number**.
  - d. Click the **Select** button to open the **Address Search** and select an address or add a new address. For more information, see [Selecting an Address](#) on page 69.



## Using the Self Update Provider Portal

- e. Select or deselect the **Offers Extended Childcare** check box.

**NOTE:** If extended hours are already recorded for the current term and this check box is deselected, when the change is approved it will only affect future terms with no extended hours recorded.

If no extended hours have been recorded against any funded service in Current term (e.g. Autumn 2018), then the Local Authority / Provider should be able to select Autumn as the term extended hours ceases from.

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

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

3. Click the **Submit** button.

The screenshot shows the 'Service Details' tab of the Self Update Provider Portal. The breadcrumb trail is 'Self Update / Provider - manage Access / Service 2'. The navigation menu includes 'Service Details' (active), 'Consent', 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The 'Guidance Notes' section is expanded to 'Service Guidance'. The form fields are as follows:

- Service Name:** Service 2
- Service Type:** Maintained Nursery Schools/Cla
- Start Date:** 04/01/2016
- End Date:** (empty)
- Registered For Nursery Education Grant / Funding:** (checked)
- Email Address:** service@mail.com (highlighted in yellow, with a 'Pending changes' icon)
- Web Site:** (empty)
- Telephone Number:** (empty)
- Fax Number:** (empty)
- Address:** Test, UK (with a 'Select' button)
- Ofsted Provision Type:** (empty)
- Offers Extended Childcare:** (checked)
- Details of your 30 hours offer:** (empty text area)
- Other Information:** (empty text area)
- Comments for Local Authority:** (empty text area)

At the bottom left are 'Back' and 'Clear' buttons. At the bottom right is the 'Submit' button.

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 87.

## Selecting an Address

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

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

Alternatively, if the required address is not listed:

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

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

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

## Updating Consent Details

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

1. View the service details and select the **Consent** tab to display the details currently held for the service. For more information, see [Viewing Service and Consent Details](#) on page 59

The screenshot shows the 'Consent' tab in the Self Update Provider Portal. The breadcrumb trail is 'Self Update / Provider - manage Access / Service 2'. The navigation menu includes 'Service Details', 'Consent', 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The 'Consent' section is titled 'Guidance Notes' and 'Service Consent Guidance'. It contains the following items:

- Consent to publish details to FID:
- Reason for not publishing details:
- Consent to share cost details:
- Consent to share telephone numbers:
- Consent to share address details:
- Consent to be contacted by email:
- Consent to be contacted by telephone:
- Consent to be contacted by post:
- Signature provided:
- Comments for Local Authority:

Buttons for 'Back' and 'Submit' are located at the bottom of the form.

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

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 87.

## Updating Availability and Capacity Details

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

When changes are submitted, if email feedback is enabled on the **Self Update General Configuration** page, an email will be sent to the email address specified. For more information, see [Configuring the Self Update Portal](#) on page 19.

### Adding a New Opening Date

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see 59 page .

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

- e. Click the **Submit** button.

The **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear All** button is displayed to enable the submitted changes for this item and all associated records to be cleared. For more information, see [Clearing All Related Changes](#) on page 88.

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

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

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

- c. Enter the opening times for this opening date.
- d. Click the **Submit** button.

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 87.

Description	Week day	Start Time	End Time	Vacancies	Pending Change	Clear	Changes
	MON	15:30	18:30	1	Create	Clear All	

4. If required, add exceptions to the opening times for this opening date:
  - a. Select the **Opening Times Exceptions** tab.

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

## Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / After School / New

Guidance Notes  
Service Opening Times Exceptions Guidance

Week Day ·

Start Time (HH:MM 24 Hour) ·

End Time (HH:MM 24 Hour) ·

Start Date ·

End Date ·

Capacity ·

Vacancies ·

Is Open ·

Description ·

Comments for Local Authority ·

Back Submit

- c. Enter the opening times exceptions for this opening date.
- d. Click the **Submit** button.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / After School / FRI

Guidance Notes  
Service Opening Times Exceptions Guidance

Week Day ·

Start Time (HH:MM 24 Hour) ·

End Time (HH:MM 24 Hour) ·

Start Date ·

End Date ·

Capacity ·

Vacancies ·

Is Open ·

Description ·

Comments for Local Authority ·

Back Clear Submit

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 87.

## Updating an Existing Opening Date

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 59

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			
After School	03/09/2018		Create	Clear All	Changes

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

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



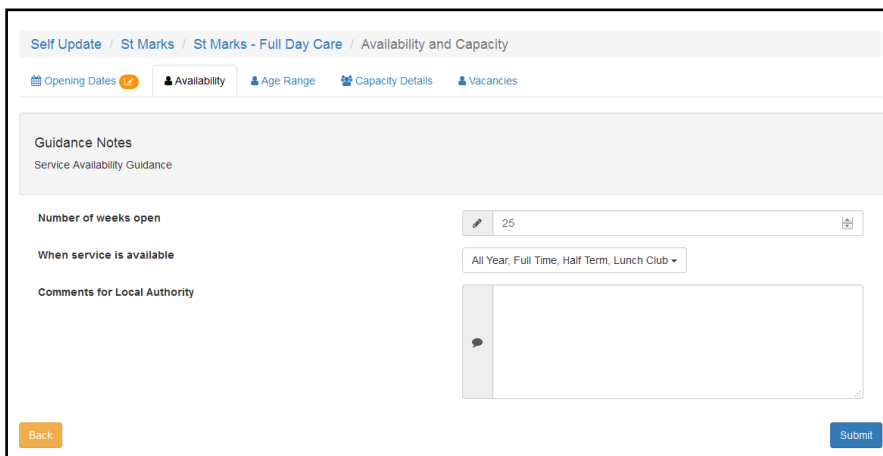
## Updating the Availability of the Service

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 59

To update availability:

- a. Select the **Availability** tab.

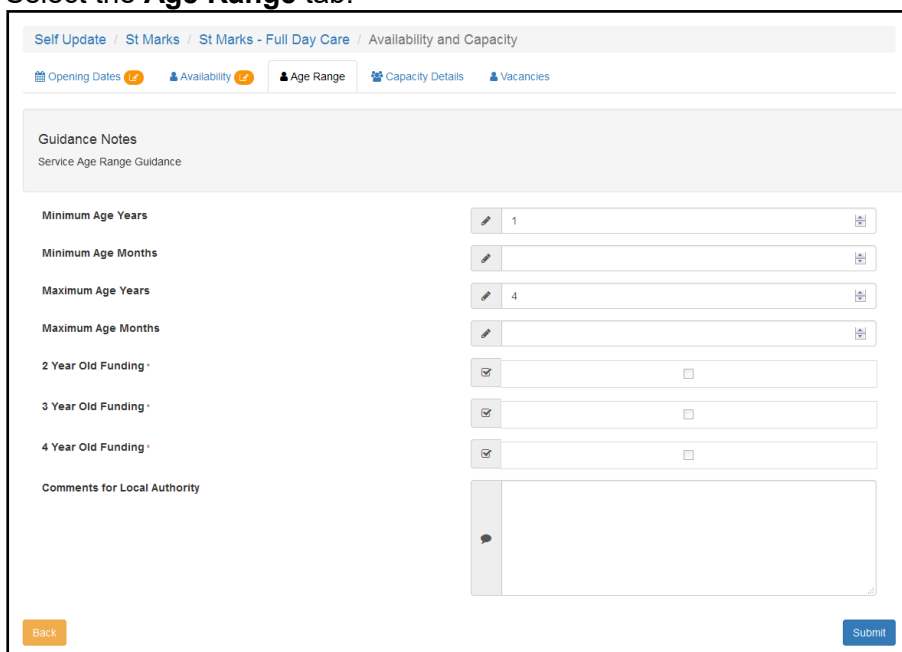


- b. Enter the required information.
- c. Click the **Submit** button.

## Updating Age Ranges at the Service

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

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



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

## Updating the Capacity Details for the Service

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 59.
2. Select the **Capacity Details** tab.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range **Capacity Details** Vacancies

Guidance Notes  
Service Capacity Guidance

Capacity Date 06/07/2007

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0		12	30	
Age 1		12	30	
Age 2		12	30	
Age 3			30	
Age 4			30	
Age 5			30	
Age 6			30	
Age 7			30	
Age 8			30	

Comments for Local Authority

Back Add Age Range Submit

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

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Guidance Notes  
Service Capacity Guidance

Capacity Date

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0	<input type="text"/>	12	30	
Age 1	<input type="text"/>	12	30	
Age 2	<input type="text"/>	12	30	
Age 3	<input type="text"/>	<input type="text"/>	30	
Age 4	<input type="text"/>	<input type="text"/>	30	
Age 5	<input type="text"/>	<input type="text"/>	30	
Age 6	<input type="text"/>	<input type="text"/>	30	
Age 7	<input type="text"/>	<input type="text"/>	30	
Age 8	<input type="text"/>	<input type="text"/>	30	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Create <input type="button" value="Clear"/>

Comments for Local Authority

- b. Select an **Age Range** from the drop-down.
  - c. Enter the capacity details for the new age range.
  - d. Click the **Create** button.
5. Click the **Submit** button.

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing All Related Changes](#) on page 88.

## Updating the Vacancy Details

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

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 59.
2. Select the **Vacancies** tab.

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

The updated fields are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 87.

## Updating Travel Information

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

1. View the basic details for the service and select the **Travel** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 59.
2. To update details about parking spaces, own transport and travel:
  - a. Select the **Travel Details** sub-tab.

- b. If required, select or deselect the check boxes, enter **Travel Information** and comments.
- c. Click the **Submit** button.

## Using the Self Update Provider Portal

3. To add a new school pickup:
  - a. Select the **School Pickups** sub-tab.

The screenshot shows the navigation path: Self Update / St Marks / St Marks - Full Day Care / Travel. Below this, there are two tabs: 'Travel Details' (active) and 'School Pickups'. A toolbar contains buttons for 'Base Description', 'Memo', 'Pending Change', 'Delete', 'Clear', and 'Changes'. At the bottom, there is a 'Back' button on the left and an 'Add School Pickup' button on the right.

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

The screenshot shows the 'Add School Pickup' form. It includes a breadcrumb trail: Self Update / St Marks / St Marks - Full Day Care / Travel / New. A 'Guidance Notes' section contains the text: 'Information about parking spaces, travel, own transport & school pickups'. The form has three main sections: 'School Pickup' with a location selector and a 'Select' button; 'Memo' with a text area; and 'Comments for Local Authority' with another text area. At the bottom, there is a 'Back' button on the left and a 'Submit' button on the right.

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

The screenshot shows the 'Select School Pickup' dialog box. It prompts the user to 'Please use the fields below to refine your search.' There are two input fields: 'Name' with a placeholder 'Please enter name here' and 'Type' with a dropdown arrow. A 'Find' button is located below the fields, and a 'Close' button is in the bottom right corner.

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

The screenshot shows the 'Select School Pickup' dialog box with search results. The 'Name' field contains 'Church' and the 'Type' dropdown is set to 'Lower School'. The 'Find' button is highlighted. Below the input fields, a table displays the search results:

Name	Type
Church End Lower School	Lower School

A 'Close' button is located in the bottom right corner.

e. Select the required school in the list.

The screenshot shows a web interface for a 'Self Update' portal. The breadcrumb trail at the top reads: 'Self Update / St Marks / St Marks - Full Day Care / Travel / New'. Below this is a 'Guidance Notes' section with the text: 'Information about parking spaces, travel, own transport & school pickups'. The main form area has three sections: 'School Pickup', 'Memo', and 'Comments for Local Authority'. In the 'School Pickup' section, a dropdown menu is open, showing 'Church End Lower School' selected. To the right of the dropdown is a blue 'Select' button. The 'Memo' and 'Comments for Local Authority' sections each have a text input area with a speech bubble icon on the left. At the bottom left is an orange 'Back' button, and at the bottom right is a blue 'Submit' button.

f. If required, add a **Memo** and comments.

g. Click the **Submit** button.

This screenshot shows the same web interface as the previous one, but with the 'School Pickup' dropdown now closed and highlighted in yellow. The breadcrumb trail has updated to: 'Self Update / St Marks / St Marks - Full Day Care / Travel / Church End Lower School'. The 'Select' button now has a small orange checkmark icon to its right. In the bottom left corner, there are now two buttons: an orange 'Back' button and a red 'Clear' button. The blue 'Submit' button remains in the bottom right corner.

## Changes to school pickups

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

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

Configuration Key	Configuration Value
Availability And Capacity	<input checked="" type="checkbox"/>
Consent	<input checked="" type="checkbox"/>
Travel	<input checked="" type="checkbox"/>
Costs	<input checked="" type="checkbox"/>
Facilities	<input checked="" type="checkbox"/>
Additional Information	<input checked="" type="checkbox"/>
Review Additional Information Submissions	<input checked="" type="checkbox"/>
Manage Additional Information	Manage Additional Information
Show Early Years Census	<input checked="" type="checkbox"/>
Review Early Years Census Submissions	<input checked="" type="checkbox"/>
Email address for submission notifications	SelfUpdateAdminEmail@SelfUpdate.com
The self update email address	SelfUpdateEmail@SelfUpdate.com
Enable email notifications upon Provider submission	<input type="checkbox"/> OFF
Enable email notifications upon Local Authority approval	<input type="checkbox"/> OFF
Enable provider users to add services	<input checked="" type="checkbox"/>
Run a Scheduled Notification Task	<input checked="" type="checkbox"/>
Send email notifications if there are provider updates awaiting approval	<input type="checkbox"/> OFF
Send email notifications if there are provider updates awaiting approval ONLY if new updates have been submitted since the last email	<input checked="" type="checkbox"/>
School pickups base group	green abbey

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

Select School Pickup

Please use the fields below to refine your search.

Name:

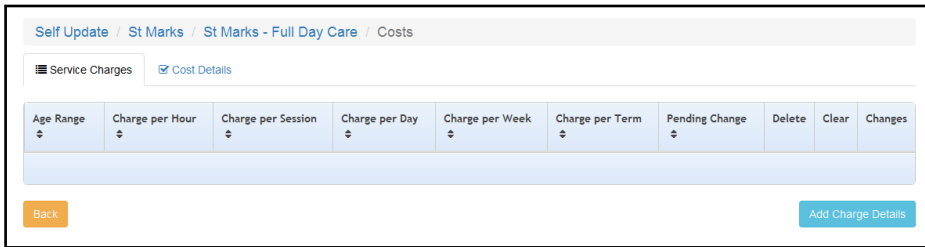
Type:

Name	Type	School Number	Local Authority	Active
Green Abbey School	Secondary	4231	Bedfordshire 97 (820)	Yes

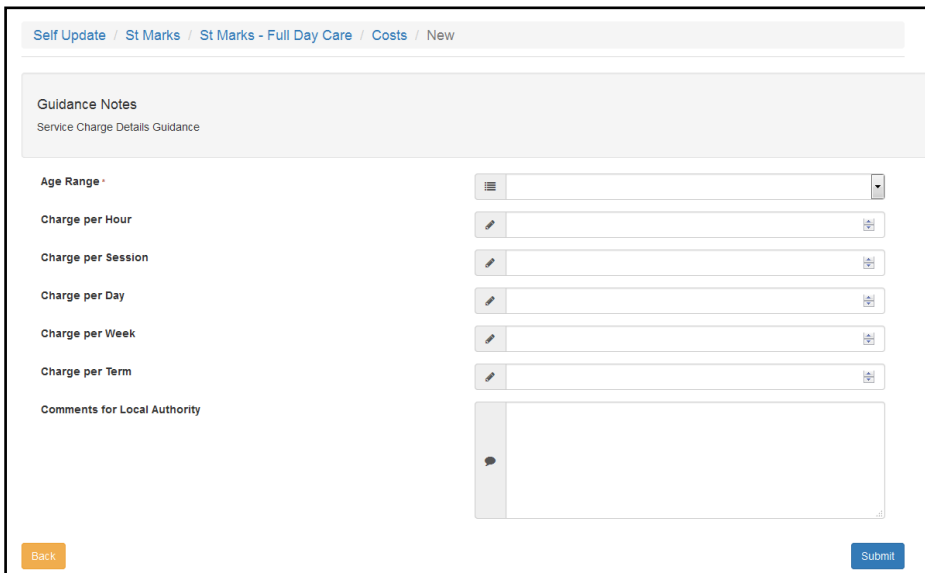
## Updating Service Charges

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

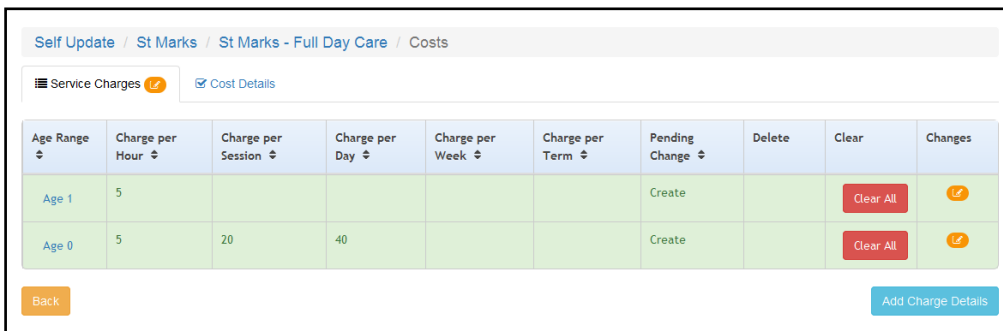
1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54.
2. Click the link for the required service to display the **Service Details** tab.
3. To add new service charges:
  - a. Select the **Costs** tab to display the **Service Charges** sub-tab.



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



- c. Select an **Age Range** from the drop-down.
    - d. If required, enter charges and comments.
    - e. Click the **Submit** button.
4. To update service charges:
  - a. Select the **Costs** tab to display the **Service Charges** sub-tab.





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

The screenshot shows the 'Self Update' portal interface. At the top, there is a breadcrumb trail: 'Self Update / St Marks / St Marks - Full Day Care / Costs / Age 1'. Below this is a 'Guidance Notes' section with the text 'Service Charge Details Guidance'. The main area contains several input fields: 'Age Range' is a dropdown menu currently set to 'Age 1'; 'Charge per Hour' is a text input field containing the number '5'; 'Charge per Session', 'Charge per Day', and 'Charge per Week' are empty text input fields; and 'Charge per Term' is also an empty text input field. Below these fields is a 'Comments for Local Authority' text area. At the bottom left, there are 'Back' and 'Clear' buttons. At the bottom right, there is a 'Submit' button.

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

## Updating Cost Details

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

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Costs** tab.
4. Select the **Cost Details** sub-tab.

The screenshot shows the 'Self Update' portal interface with the 'Costs' tab selected. At the top, there is a breadcrumb trail: 'Self Update / St Marks / St Marks - Full Day Care / Costs'. Below this, there are two sub-tabs: 'Service Charges' and 'Cost Details', with 'Cost Details' being the active sub-tab. Below the sub-tabs is a 'Guidance Notes' section with the text 'Cost per age or age range per hour, day, session, term or week'. The main area contains a 'Sibling Discount' checkbox, which is currently checked, and a 'Comments for Local Authority' text area. At the bottom left, there is a 'Back' button. At the bottom right, there is a 'Submit' button.

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

## Updating Facilities

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

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Facilities** tab.

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

## Updating Additional Information

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

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 54.
2. Click the link for the required service to display the **Service Details** tab.
3. Select the **Additional Information** tab.

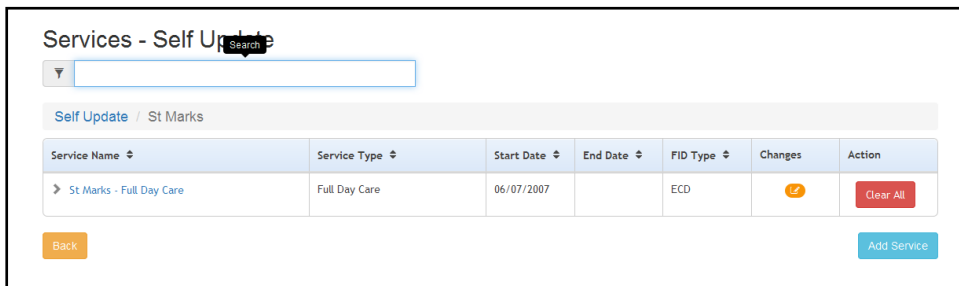
4. If required, make changes to the information.
5. Click the **Submit** button.

## Adding a Service

The ability for providers to add new services is enabled or disabled via the **Self Update - General Configuration** page. If **Enable provider users to add services** is set to **On**, a provider can add a new service. For more information, see [Configuring the Self Update Portal](#) on page 19.

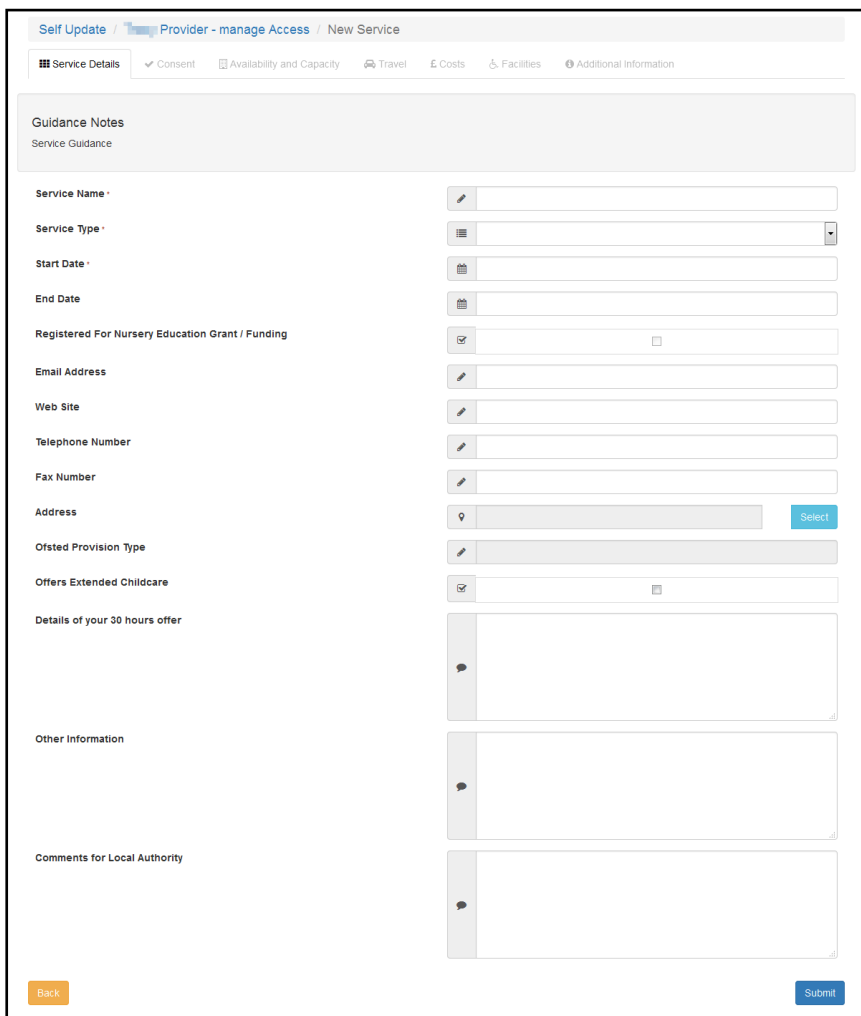
To add a new service:

1. View a list of services for the provider. For information about using the Self Update Provider Portal to view your services, see [Viewing Service Details](#) on page 54.



The screenshot shows the 'Services - Self Update' page. At the top, there is a search bar and a breadcrumb trail: 'Self Update / St Marks'. Below this is a table with the following columns: Service Name, Service Type, Start Date, End Date, FID Type, Changes, and Action. The table contains one row: 'St Marks - Full Day Care', 'Full Day Care', '06/07/2007', an empty cell, 'ECD', a yellow warning icon, and a 'Clear All' button. At the bottom left is a 'Back' button, and at the bottom right is an 'Add Service' button.

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



The screenshot shows the 'New Service' page. At the top, there is a breadcrumb trail: 'Self Update / Provider - manage Access / New Service'. Below this is a navigation bar with tabs: 'Service Details', 'Consent', 'Availability and Capacity', 'Travel', 'Costs', 'Facilities', and 'Additional Information'. The main content area is titled 'Guidance Notes' and 'Service Guidance'. Below this is a form with the following fields: Service Name (text input), Service Type (dropdown menu), Start Date (calendar icon), End Date (calendar icon), Registered For Nursery Education Grant / Funding (checkbox), Email Address (text input), Web Site (text input), Telephone Number (text input), Fax Number (text input), Address (text input with a 'Select' button), Ofsted Provision Type (text input), Offers Extended Childcare (checkbox), Details of your 30 hours offer (text area), Other Information (text area), and Comments for Local Authority (text area). At the bottom left is a 'Back' button, and at the bottom right is a 'Submit' button.

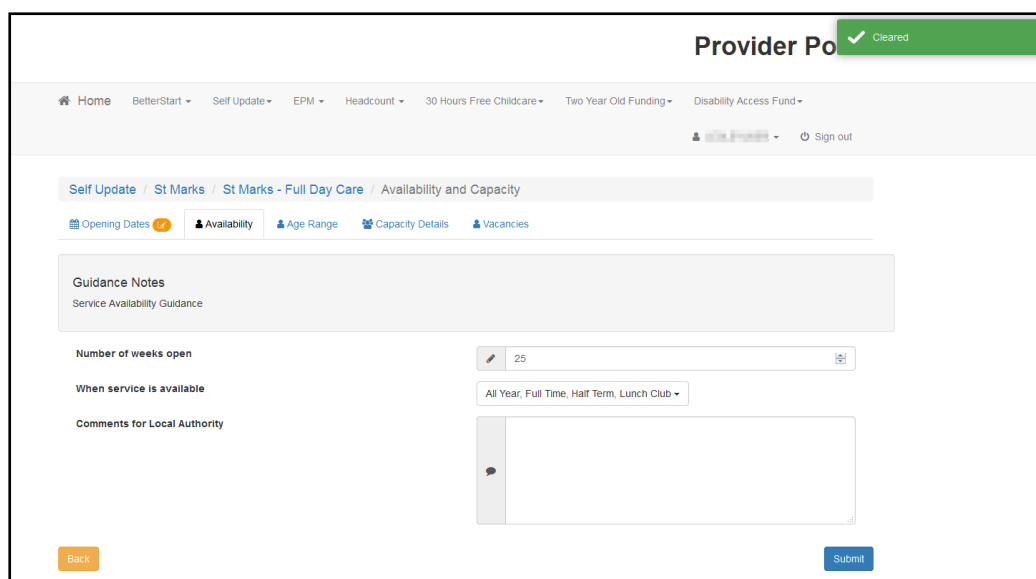
3. Enter a **Service Name**.
4. Enter a **Start Date**.
5. Select **Service Type** (*Table ID: 0423*)
6. If required, select the **Registered For Nursery Education Grant/Fund** check box.
7. If required, enter one or more of the following contact information:
  - **Email Address**
  - **Web Site** address
  - **Telephone Number**
  - **Fax Number**.
8. If required, click the **Select** button to open the **Address Search** and select an address. For more information, see [Selecting an Address](#) on page 69.
9. If required, enter remaining details:
  - **Ofsted Provision Type**
  - **Details of your 30 hours offer**
  - **Other Information**
  - **Comments for Local Authority**.
10. Click the **Submit** button.

## Clearing Submitted Changes

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

The screenshot shows the 'Self Update' interface for 'St Marks - Full Day Care' under the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity'. There are tabs for 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Availability' tab is active. Below the tabs, there is a 'Guidance Notes' section with 'Service Availability Guidance'. The main form area contains three fields: 'Number of weeks open' with a value of 26, 'When service is available' with a dropdown menu set to 'All Year, Full Time, Half Term, Lunch Club', and 'Comments for Local Authority' with an empty text area. At the bottom left, there are 'Back' and 'Clear' buttons. At the bottom right, there is a 'Submit' button.

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

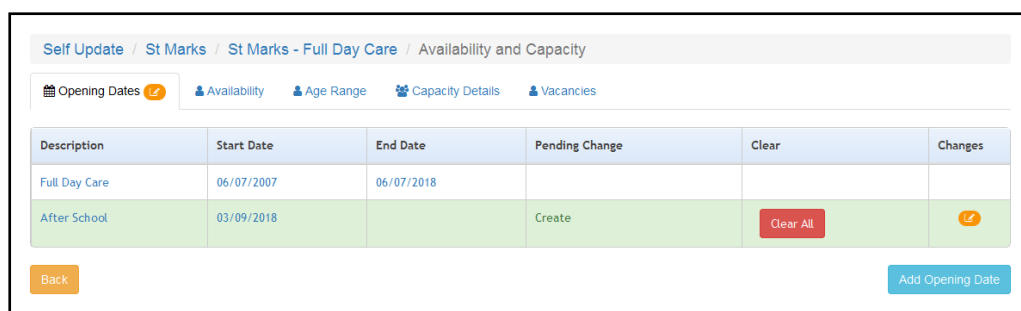


## Clearing All Related Changes

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

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

1. View the availability and capacity details currently held for the service. For more information, see [Viewing Availability and Capacity](#) on page 60.



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

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