



# Early Years Thirty Hour Entitlement Provider Portal

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Spring 2021	3.74	<p>The <b>Review Previous Check</b> screen now displays the latest check for a child. This allows admin staff to review and manage previous check related data appropriately.</p> <p>The <b>Eligibility code check history</b> screen now displays the full history of all previous checks for a child.</p> <p>For more information see: <a href="#">Reviewing Previous Checks</a> on page 36</p>
Autumn 2020	3.73	<p><b>Address Management   Manage Addresses</b></p> <p>New functionality has been added to manage addresses which includes making them active/inactive.</p> <p>When performing an address search, only those marked as <b>Active</b> will be displayed in the search result. If the postcode of an Inactive address is entered, a message stating '<b>No Results</b>' is displayed.</p> <p>In the portal, if an address had already been selected and was made inactive, it would still be displayed against the record.</p> <p>For more information see: <a href="#">Manage Addresses and System Administration Handbook</a> on <a href="#">One Publications</a> website.</p>
Summer 2020	3.72	<p><b>30 Hour Entitlement Check</b></p> <p>The Eligible From and To dates fields in v4 Client has been amended to be editable fields, enabling these dates to be extended.</p> <p>For more information see: <a href="#">Managing Early Years Payment</a> on <a href="#">One Publications</a> website.</p>

Date	Release	Description
<p><b>Summer 2020</b></p>	<p><b>3.72</b></p>	<p><b>30 Hours Check - Run a New Check</b></p> <p>Run a New Check has been updated with new functionalities as follow:</p> <ul style="list-style-type: none"> <li>■ <b>'Find a child'</b> search box has been removed. The Provider selection drop down list now permanently resides above the search fields.</li> <li>■ The search fields to enter a Childs Forename /Surname will appear after a Provider is selected. All other fields will remain greyed out.</li> <li>■ Selecting a Child from the search list will auto populate all other field with known data in the system. The fields that are left blank will need to be manually filled in.</li> <li>■ A <b>'Clear'</b> button is available to clear the data from all fields. This allows for a new search to begin.</li> <li>■ <b>View Details</b> is now available. This allows Users to see the full details of a Child prior to making a selection.</li> <li>■ <b>Run Check</b> button is disabled until all fields have been filled in using the correct format.</li> <li>■ A <b>'Re-run check'</b> and/or <b>'Run new Check'</b> button is now is available to use after an eligibility check has failed due to Child is Not Found or an error occurs.</li> <li>■ <b>'Child Not Found'</b> is a new button on the Search screen. This allows for an Ad Hoc Child to be added against a Provider for whom an eligibility check can be run.</li> <li>■ Changing a Provider – An alert message is displayed If different Provider is selected after a child's name has been entered in the search field.</li> </ul> <p>For more information see <a href="#">Running a New Check</a> page 31</p>
<p><b>Autumn 2018</b></p>	<p><b>3.67</b></p>	<p><b>30 Hour Entitlement Portal</b></p> <ul style="list-style-type: none"> <li>■ Additional filter options/display fields are shown to parents when searching for Providers they wish to share their entitlement details with.</li> </ul> <p>For more information, see <a href="#">Sharing Entitlement Details with Providers</a> on page 27.</p> <ul style="list-style-type: none"> <li>■ New message template called: <b>Thirty Hours Free Childcare - Citizen Expression of interest</b> sends Providers an email when a parent shares their 30-hour entitlement details with.</li> </ul> <p>For more information, see <a href="#">30 Hours Configuration</a> on page 26</p>

Date	Release	Description
Autumn 2018	3.67	<p><b>30 Hours Checks</b></p> <ul style="list-style-type: none"> <li>■ Multiple records are no longer returned when using <b>Run a new Check</b> - in 30 Hours Childcare.</li> <li>■ <b>Thirty Hours Childcare</b> icon now displays the number of notifications from parents that require action from the provider.</li> </ul> <p>For more information see <a href="#">Introduction to the Expiration Dashboard</a> on page 41.</p>
		<p><b>Expiration Dashboard</b></p> <ul style="list-style-type: none"> <li>■ The column order on the Expiration Dashboard now shows the <b>Earliest Date to take up 30 Hrs place</b> field before eligibility start date.</li> <li>■ A new filter has been added to the Eligibility Filter called: <b>Eligibility has ended but code is still in grace</b>. A new configuration option is available to allow LAs to set the default value in the Eligibility Filter and the Number of Days.</li> </ul> <p>For more information, see <a href="#">Displaying Children whose Eligibility is due to Expire</a> on page 42.</p>





# 02 | Introduction to the Thirty Hour Entitlement Portal

## Overview

The Thirty Hour Entitlement portal enables providers and Local Authorities to check the eligibility of working parents of 3 and 4-year-olds to an extra 15 hours of free childcare in addition to the universal entitlement of 15 hours per week.

Parents apply to HMRC for extended childcare and, if they are eligible, they are given an eligibility code to take to their childcare provider. Parents can check the validity of their eligibility code using the Citizen portal and share the information with providers.

Providers can use the Provider Portal to check the validity of eligibility codes using the DWP Eligibility Checking Service (ECS).

The One v4 Client is updated with the check information, so that Local Authorities can see which children are receiving this benefit and the checks that have been made.

When the child's forename and surname are used to perform an ad hoc check for 30 hours eligibility, if at any time in the future this child is added to the provider via the Headcount portal, the user is asked if this is the same child and the details of the ad hoc check (date of birth and eligibility code) are copied across to the Headcount portal. For more information, see [Running a New Check](#) on page 31.

**More Information:** *One Early Years Headcount Provider Portal handbook, One Early Years 30 Hour Entitlement Citizen Portal handbook and the One Early Years - Managing Early Years Payments handbook* available on the One Publications website.

## Advice to Local Authorities

Local Authorities can configure how their providers record claims for extended hours on the Headcount grid in Provider Portal. After consulting with Early Years customers, it was decided that Capita would provide two options for this:

**Providers recording their claims for universal hours and extended hours in separate columns.** With this option, providers will only be able to enter values in the extended hours columns for children that are eligible for extended childcare. Local Authorities that have decided to use this option are planning to update their declaration forms and privacy notices so that providers ask parents to declare whether their children are using their universal entitlement, extended entitlement, or both with them. Local Authorities believe that receiving the hours split out like this will help when it comes to resolving apportionments.

**Providers recording their claims for universal hours and extended hours in the same column.** With this option, providers will only be able to record claimed hours up to the extended hours cap for children that are eligible for extended childcare. For children that are not eligible for extended childcare, providers will only be able record claimed hours up to the universal cap. Local Authorities that preferred this option believed that their providers would not know if universal hours or extended hours were being claimed with them because parents would not be familiar with the concept.

This is configured using the **Combine Universal and Extended Pay Hours Columns** option via **Provider Portal | Headcount | Headcount Configuration**.

## ***Introduction to the Thirty Hour Entitlement Portal***

It is advised that Local Authorities do not select the option of combining the columns for claiming universal and extended hours for their providers on Headcount, as well as giving them the ability to record multiple line attendance. This scenario can cause issues for providers where they cannot submit their Headcount task because the system calculates that the universal cap has been reached, despite the child still potentially having extended hours remaining that can be claimed for. More information can be found in KB-476377.

These options are configured using the **Combine Universal and Extended Pay Hours Columns** option and the **Add Line** check box via **Provider Portal | Headcount | Headcount Configuration**.

After consultation with Local Authorities, it was decided that there would not be a requirement for extended caps to be set differently to universal caps, because they are both 15 hours per week. As a result, different caps cannot be set for universal and extended hours.

The **Offers Extended Childcare** checkbox in Early Years v4 can be set for each service and signifies whether that service offers extended childcare. Services that do not offer extended childcare places should have a cross in this check box, which results in this service being unable to claim extended hours for their children on Headcount. This check box is ticked by default and it is recommended that Local Authorities change the state of this check box where necessary during their set up for the term that starts on 1<sup>st</sup> September 2017.

This is updated on the **Service Provision Details** screen in the v4 Client via **Focus | Early Years | Search Service Provision**.

There is a global configuration setting for Local Authorities which controls whether they fund children that are found to be eligible in the middle of the term after the child's third birthday (as opposed to funding them from the start of the following term). If the Local Authority wants to fund these children, then providers will be able to claim extended hours for them on Headcount and the Local Authority will be able to process payments for them in Early Years v4. By default, funding for mid-term eligible children is disabled. It is recommended that Local Authorities decide how they would like to manage this process during their set up for the term that starts on 1<sup>st</sup> September 2017.

This set up on the **Mid-Term Funding for Extended Childcare** panel in the v4 Client via **Focus | Early Years | Early Years Setup | Payment Setup Options**.

Weeks and hours information can be pre-populated on Headcount for providers based on settings configured by the Local Authority. The values that are pre-populated are those that are stored against the funded service in Early Years v4 at the point the Headcount task is created. Local Authorities can use the Carry Over routine to efficiently populate values against the funded service. For example, ahead of the term that starts on the 1<sup>st</sup> September 2017, Local Authorities may choose to carry over paid hours from the summer term to the interim hours of the autumn term. When the Local Authority creates the Forecast Headcount task, these carried over hours will be pre-populated for providers, which will hopefully save them time when entering data. It is also worth noting that new functionality has been introduced in the Carry Over routine, which gives Local Authorities the ability to carry over interim weeks to actual weeks within the same term.

This option is set on the **Headcount Grid Configuration** panel via **Provider Portal | Headcount | Headcount Configuration**.

The Carry Over routine is accessed in the v4 Client via **Focus | Early Years | Carry Over/Update**.

Local Authorities can define each supplement / SFF code whether it applies to universal, extended hours or both. This gives flexibility if the Local Authority wants to have a different hourly rate between extended hours and universal hours, for example, to pay EYPP / Deprivation supplements to just the universal hours claimed.

This is set up in the v4 Client by clicking the **Add** button on the **Single Funding Formulas** panel via **Focus | Early Years | Early Years Setup | Payment Setup Options**.

Automatic rechecking functionality is available and the parameters controlling this are defined by the Local Authority. The time at which the rechecking runs is flexible and is defined using a scheduled task. If required, the scheduled task can be set to run daily, but the Local Authority can run it at any time. The check records that will be included in the automatic recheck are based on a configurable number of days before and after the end date of an eligible check record. Providers and the Local Authority can then view the results of these rechecks.

The scheduled task is set up in the v4 Client via **Tools | Administration | Schedule Task**. The batch size and length of time between checks is configured via **Provider Portal | 30 Hours Free Childcare | Configuration**.

A number of v4 Early Years routines, processes and screens have been modified to accommodate extended hours functionality. This includes additional database fields. To report on extended hours, you will need to consider amending your existing reports or creating additional ones.

To know when a child is reaching the end date of their eligibility or are in their grace period, Local Authorities can:

- Grant themselves access to their providers' accounts so that they can view the Expiration Dashboard on a provider level and monitor children that are nearing the end date or are in their grace period.

- Create a report to provide the required information.
- View the information on the **Student Details | Early Years Additional Information** panel.

**More Information:**

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

For information regarding setting up the Thirty Hour Entitlement portal, refer to the Technical Guide: *Setting Up One Early Years Thirty Hours Entitlement for Local Authorities*.

For information regarding Early Years Headcount, refer to the Handbook: *One Early Years Headcount Provider Portal*.

For information regarding setting up Early Years in the v4 Client, refer to the Handbook: *One Early Years Setup*

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

For information regarding creating a scheduled task, refer to the Technical Guide: *v4 Scheduled Tasks*

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

## Using this Handbook

This handbook is intended for the Early Years team and One Coordinator at the Local Authority.

The first chapter provides an overview of Provider portal administration.

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

The third chapter describes configuring the link to the DWP Eligibility Checking Service (ECS).

The fourth chapter provides an overview of the processes performed by Early Years providers to run checks and review previous checks.

The fifth chapter covers using the Expiration Dashboard to display children who are nearing their eligibility end date.

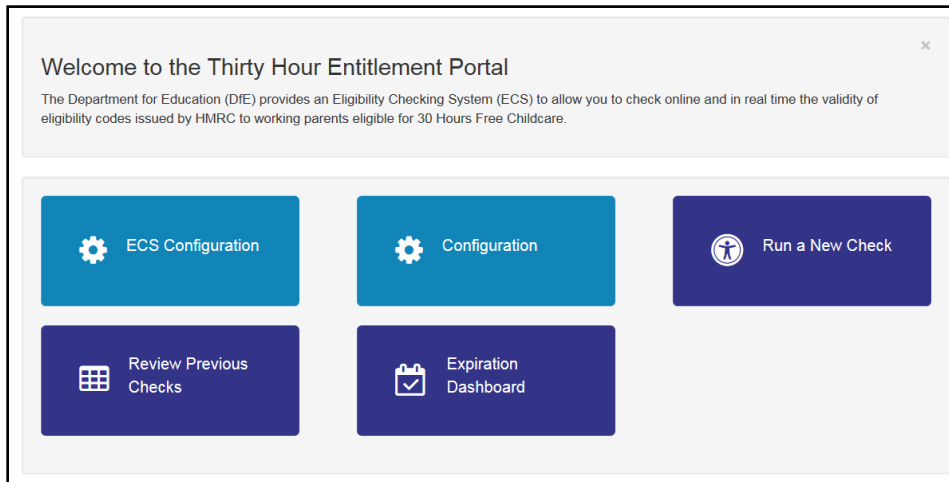
The sixth chapter describes the process in the v4 Client to update the student details record with information about Thirty Hour Entitlement checks that have been run.

## Home Page

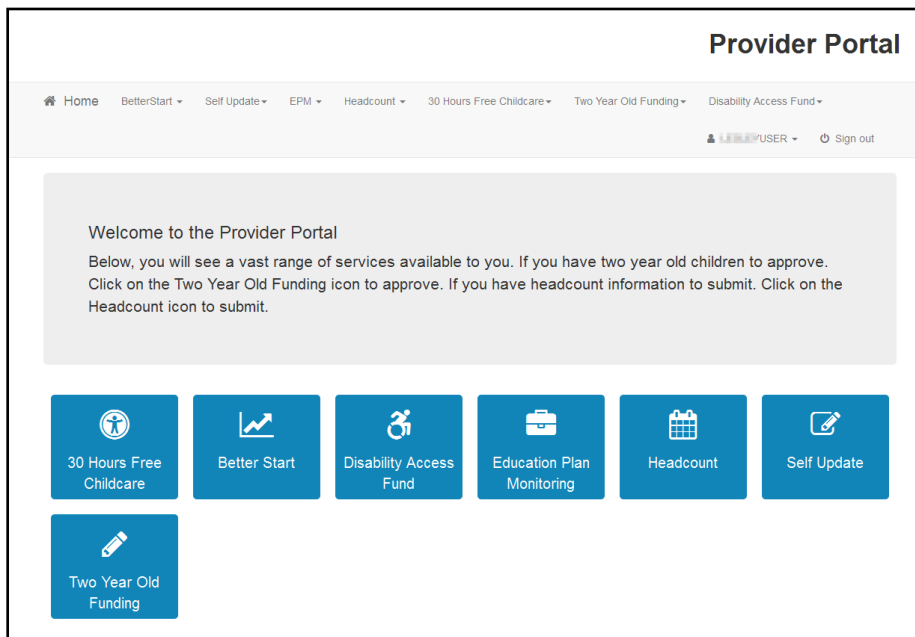
### Displaying the Home Page

When a user logs into the Provider portal, the home page displayed depends on the permissions that have been assigned.

If they only have permission as a 30 Hours User, the **Thirty Hour Entitlement Portal** home page is displayed.



If they also have permission to access another Provider portal module and the Local Authority has the Headcount licence, the **30 Hours Free Childcare** tile is displayed on the **Provider Portal** home page as shown in the following graphic.



For more information about assigning permissions, see [Assigning Permissions](#) on page 23.

## Portal Administration

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

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

The **30 Hours Free Childcare | Administrator** menu route enables the Local Authority Early Years Admin Officer to perform ECS Configuration. For more information, see [ECS Configuration](#) on page 24.

## 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.

## Configuring the Provider Portal

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

### Manage Configurations

Configuration Key	Configuration Value	⚠
Include the admin on emails sent	<input type="checkbox"/> OFF	
The from email address used when messages are sent	<input type="text" value="admin@capita.co.uk"/>	
When sending lots of emails, batch them up into groups of this size	<input type="text" value="30"/>	
Maximum messages to show on the home page	<input type="text" value="10"/>	
Is second factor authentication enabled	<input type="checkbox"/> OFF	
Is Mini Profiler enabled	<input checked="" type="checkbox"/> ON	
The Portal url	<input type="text"/>	
Google Analytics tracking id	<input type="text"/>	
Account lockout time span in minutes	<input type="text" value="4"/>	
Maximum failed Verification Code attempts	<input type="text" value="9"/>	
Pop-up message expiry time in seconds	<input type="text" value="16"/>	

2. For each **Configuration Key**, change the **Configuration Value**, if required:
3. If required, set **Include the admin on emails sent** to **On**.
4. Enter an email address for: **The from email address used when messages are sent**.
5. Enter a number for: **When sending lots of emails batch them up into groups of this size**.
6. Enter the number of **Maximum messages to show on the home page**.
7. If required, set **Is second factor authentication enabled** to **On**.
8. If required, set **Is Mini Profile enabled** to **On**.
9. If required, enter **The Portal url**.
10. If required, enter the **Google Analytics tracking id**.
11. If required, enter the **Account lockout time span in minutes**.
12. If required, enter the **Maximum failed Verification Code attempts**.
13. If required, enter the **Pop-up message expiry time in seconds**.
14. Click the **Save** button.

#### More Information:

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



## Text Customisation

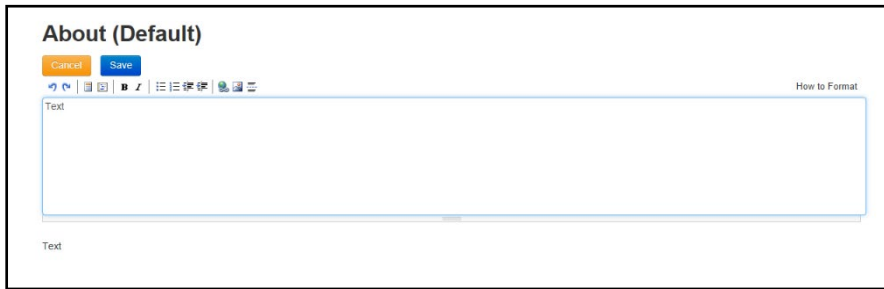
All text, field labels and messages that are displayed on the website can be configured.

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.



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.

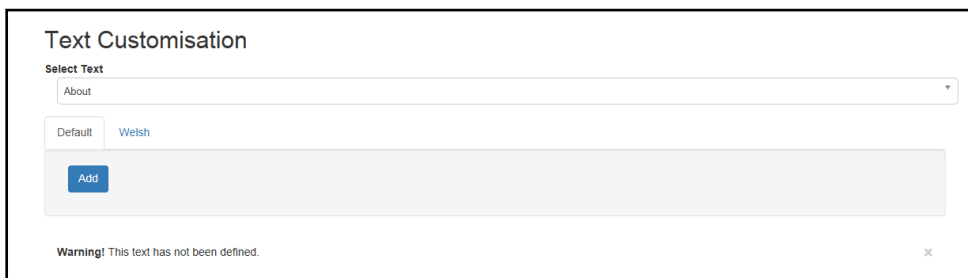
## Guidance Notes

Guidance text can be configured to display on specific screens.

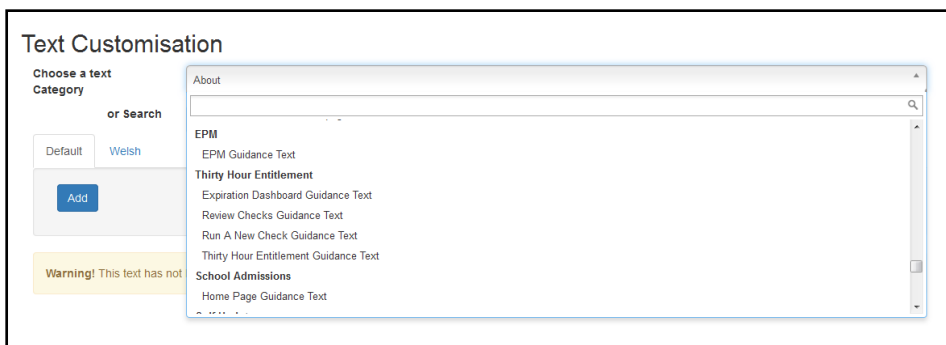
## Updating Guidance Notes

Guidance notes are configured for each screen using the text customisation facility.

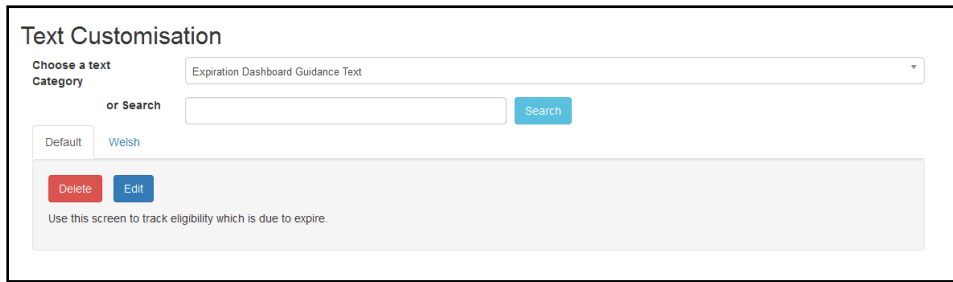
1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.



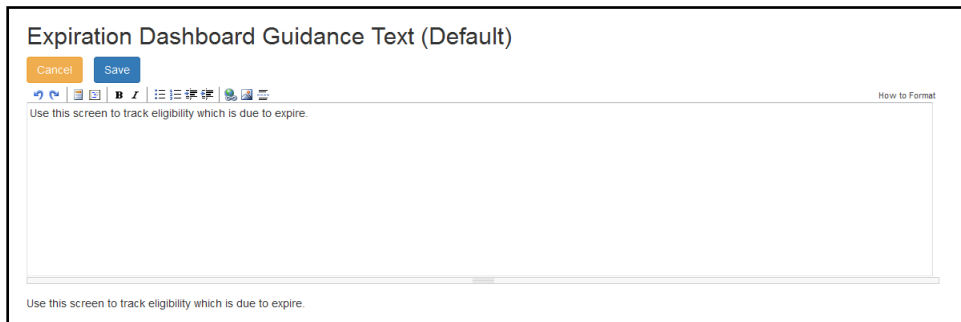
2. Click the drop-down to display a list of available text that can be customised.
3. Scroll to the required list of screens e.g. **Thirty Hour Entitlement**.



4. Select the required screen.



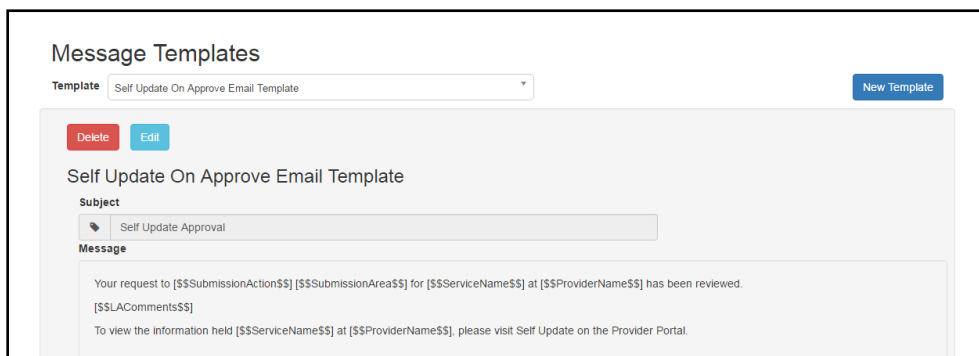
5. Click the **Edit** button.



6. Make the required changes and 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.

**Edit Template**

Template Name • Self Update On Submit Email Template

Subject • Self Update Submission

Message • How to Format

A request to [SubmissionAction] [SubmissionArea] has been submitted to [ServiceName] at [ProviderName].

[ProviderComments]

Services can be accessed through Self Update.

Cancel Save

Preview

A request to [SubmissionAction] [SubmissionArea] has been submitted to [ServiceName] at [ProviderName].

[ProviderComments]

Services can be accessed through Self Update.

4. Make the required changes to the **Template Name**, **Subject** or **Message** text. Formatting buttons are provided above the panel.  
The amended text is displayed in the **Preview**.
5. Click the **Save** button.



# 03 | Managing Users

## Introduction

**NOTE:** Users are created, and user permissions are set up in the v4 Client.

In the Thirty Hour Entitlement portal there are two types of users, Provider users and Local Authority administrators (Early Years Admin Officers). Provider users can run checks and review previous checks. LA administrators can manage access to providers, configure the link to the Eligibility Checking Service (ECS) and perform portal administration.

User creation is a three-stage process.

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

Secondly, the user must be assigned to the correct security group in the v4 Client. Permissions are assigned to a security group in the v4 Client via **Tools | Permissions | User Group Processes**.

Finally, after a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal via the **Manage Access** area.

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

## Creating a Portal User Account

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

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

## Activating a Portal User Account

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

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

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

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

**More Information:**

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

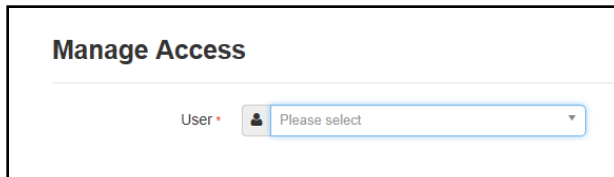
## Managing User Access

### 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.

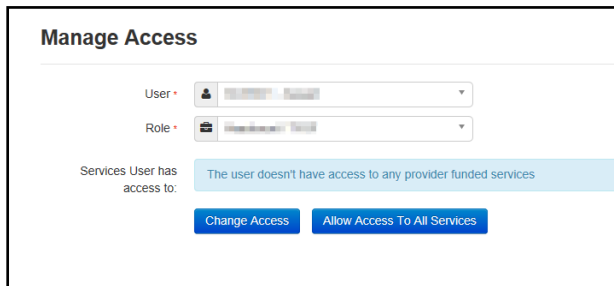
To update access for the selected user:

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



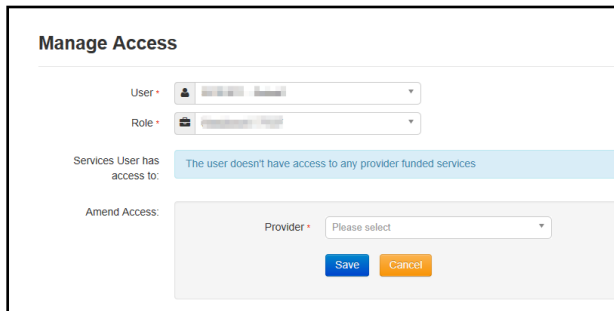
The screenshot shows the 'Manage Access' page with a 'User' dropdown menu set to 'Please select'.

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' dropdown menu and a 'Role' dropdown menu. Below the dropdowns, 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.

## Removing Access from a User

To remove a user's access to all services:

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

The screenshot shows the 'Manage Access' page. It features a 'User' dropdown menu with 'TSUSER - TUser' selected, and a 'Role' dropdown menu with 'Headcount / TYOF / Early Years Self Update' selected. Below these, it states 'Services User has access to:' and lists 'Bumble Bee Nursery' with a sub-item 'Full Day Care'. At the bottom, there are three buttons: 'Change Access' (blue), 'Allow Access To All Services' (blue), and 'Remove All' (red).

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

## Logging into the Portal

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

The screenshot shows the 'Provider Portal' login screen. It has a 'Home' link in the top left. The main area is divided into two sections: a 'Log In' form on the left and a 'Welcome to the provider portal' message on the right. The 'Log In' form includes fields for 'Username' and 'Password', a 'Log In' button, and links for 'Forgotten your username?' and 'Forgotten your password?'.

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.

The screenshot shows the 'Forgotten Username' page. It has a heading 'Forgotten Username' and a sub-heading 'To retrieve your username, enter the registered email address associated with your account'. Below this is an 'Email Address' input field with a lock icon and a 'Submit' button.

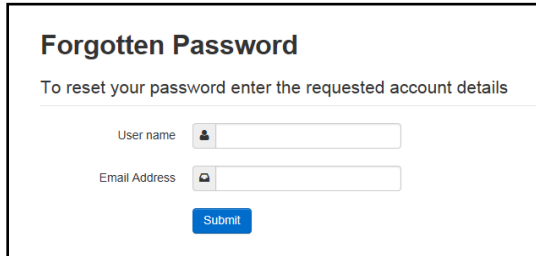
2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.



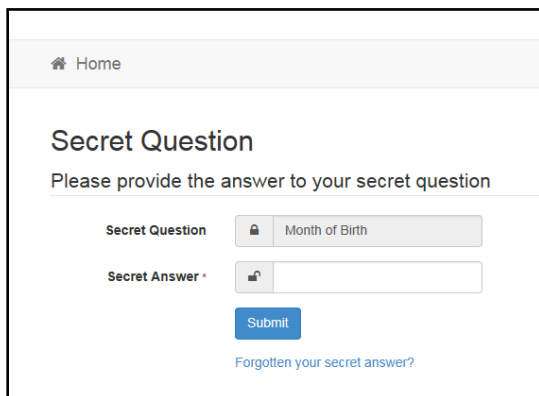
## Resetting Your Portal Password

To reset your password:

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



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

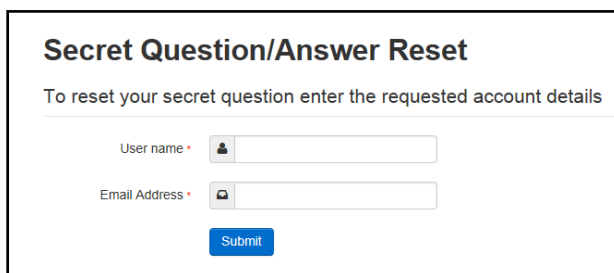


4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

## Resetting Your Secret Question

If you need to reset your secret question:

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



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

### More Information:

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

# 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 explanatory text: 'Two Step Verification is our way to make your data more secure. If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe. Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled. Changing your preference will sign you out, and you will need to sign in again.' 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.

This screenshot is identical to the previous one, showing the 'Two Step Verification' configuration page. 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.

## Reviewing Users

### Introduction

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

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

### Viewing User Details

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

The screenshot shows the 'Review Users' interface. At the top, there is a search bar with a 'Name' input field and a 'Search' button. Below the search bar, it indicates '42 Records Found'. A table displays user information with columns for Username, Description, Active status, Registered status, Email, Groups, and Action. Two users are visible: 'TestUser' (Admin user for EPM, Active, Registered with a red X) and 'VPADM' (vpadm, Active, Registered). The 'TestUser' row has 'Reset Password, Reset Account' in the Action column, while 'VPADM' has 'Reset Password'. At the bottom, there are 'Cancel' and 'Refresh' buttons.

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

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

### Updating a User Email Address

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

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

### Resetting a User Password

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

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

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

## Resetting a User Account

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

The screenshot shows the 'Review Users' interface. At the top, there is a search bar with the text 'Name' and a 'Search' button. Below the search bar, it indicates '42 Records Found'. A pagination control shows 'Page 2 of 5' and navigation buttons for pages 1, 2, 3, 4, and 5. The main table has the following columns: Username, Description, Active, Registered, Email, Groups, and Action. The first row shows a user with Username 'EPMUSER', Description 'EPM user', Active status 'x' (inactive), Registered status '✓', Email 'Testuser17@onetestr', and Groups 'EPMUSERGROUP'. The Action column for this user contains the link 'Reset Password, Reset Account'.

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

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

**NOTE:** The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see [Resetting a User Password](#) on page 22

## Assigning Permissions

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

### Permission to Access 30 Hours Free Childcare

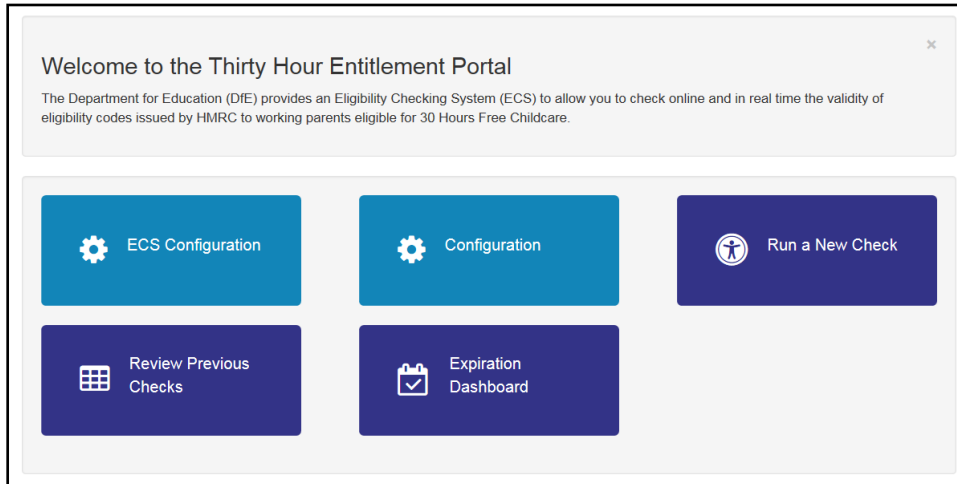
To access 30 Hours, the permission required is **Read-Write-Delete** for the business process **Thirty Hour Entitlement User** under the **Provider Portal** main business process.

The screenshot shows the 'Permissions Editor' window. It has a 'Save' button at the top left. The table below lists various user groups and their permissions for different business processes. The columns are Name, Read, Read-Write, Read-Write-Delete, and Deny. The 'Thirty Hour Entitlement User' group has a green checkmark in the 'Read-Write' column, indicating it has the required permission.

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

# 04 | Thirty Hours Administration

## ECS Configuration



Select **ECS Configuration** from the **30 Hours Free Childcare | Administrator** menu to display the **ECS Configuration** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page click the **ECS Configuration** button.

## Configuring the Link to the ECS

### ECS Configuration

The **ECS (Eligibility Checking Service) Settings** panel is used to store the credentials and information used for connection to the **Department for Work and Pensions (DWP)** online checking service

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

### ECS Settings

ECS Configuration

Configure the link to the DWP Eligibility Checking Service

**ECS Settings**

ECS Environment: Live

ECS Local Authority: Capita One

ECS Username: Capita One18675

ECS Password: Update ECS Password

ECS System Status: Test

Save

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

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

### ECS Override Settings

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

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

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

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

## Setting Up Automatic Recheck

A scheduled task is set up on the application server to automatically recheck a child’s eligibility. If required, the scheduled task can be set to run daily, but the Local Authority can run it at any time. The task uses the parameters configured on the **30 Hours Free Childcare Configuration** page to determine which entitlements to recheck. For more information, see 30 Hours Configuration on page

The task determines which checks to do and splits them into batches of a configured size. It submits the batches to the ECS. Periodically, a timed integration server event queries the ECS for completed batches and downloads the results.

On the **ECS Configuration** page, the batch size and length of time between checks can be configured by the Local Authority. To change the parameters:

1. Select **ECS Configuration** from the **30 Hours Free Childcare | Administrator** menu to display the **ECS Configuration** page.
2. Alternatively, on the **Thirty Hour Entitlement Portal** home page click the **ECS Configuration** button.
3. If required, enter a **Batch Size (Records)**.
4. If required, enter a **Recheck sleep (Minutes)**.
5. Click the **Save** button.

## 30 Hours Configuration

The **30 Hours Free Childcare Configuration** page is used to set configuration values that are used in the portal.

The **Recheck Scheduled Task Configuration** panel enables the Local Authority to define the parameters used by the automatic recheck scheduled task. The scheduled task compares the child’s eligibility end date with the current date to determine whether to perform an automatic check. The Local Authority can set a value for the **Days before Eligibility End Date to start rechecking** and **Days after Eligibility End Date to continue rechecking**.

1. Select **Configuration** from the **30 Hours Free Childcare | Administrator** menu to display the **30 Hours Free Childcare Configuration** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page click the **Configuration** button.

30 Hours Free Childcare Configuration		
General Configuration		
Configuration Key	Configuration Value	▲
Child's name is required on the check screen	<input checked="" type="checkbox"/>	
Citizen Share Eligibility To Provider Template	Thirty Hours Free Childcare - Citizen Expression of interest	
Eligibility Filter	Grace Period Expired in the last 180 days	
No of Days before/after expiration	180	
Re-Check Scheduled Task Configuration		
Configuration Key	Configuration Value	▲
Days before Eligibility End Date to start rechecking.	10	
Days after Eligibility End Date to continue rechecking.	60	
If the scheduled task ran today it would automatically recheck any eligibility whose end date lies in the range of 05/Nov/2018 back to 27/Aug/2018 (this date range is dynamically calculated using the parameters above). Any changes will be picked up the next time the task runs.		
ⓘ The scheduled task is enabled and last ran 26/Oct/2018 14:00, it will next run 26/Oct/2018 14:15.		

2. If required, select the check box to make Child's name a required field when running a check.
3. If required, from the **Citizen Share Eligibility To Provider Template** list, select the template **Thirty Hours Free Childcare - Citizen Expression of interest**. This template is used to enable a notification to be sent to Providers when a Parent choose to share their entitlement with them.
4. If required, select an **Eligibility** Filter to be set as the default filter.

**Note:** On selecting template **Eligibility has ended but code is still in grace** then **No. of Days before/after expiration** field becomes no longer visible.

5. If required, enter a default value for the **No. of Days before/after expiration**.
6. If required, enter the number of **Days before Eligibility End Date to start rechecking**.
7. If required, enter the number of **Days after Eligibility End Date to continue rechecking**.
8. Click the **Save** button.

*Note:* For more information, refer to the *Early Years - Thirty Hour Entitlement Citizen Portal* available on the [One Publications](#) website.

## Sharing Entitlement Details with Providers

Parent(s) have been provided with the option where they can choose to share their Entitlement Details with a Provider(s) of their choice.

Parent(s) can do this by logging onto Citizen Portal then select the **Choose Providers to apply for Extended Hours Placement** link.



*Note:* For more information, refer to the *Early Years - Thirty Hour Entitlement Citizen Portal* available on the [One Publications](#) website.

On the **Welcome to the Thirty Hour Entitlement Portal** page additional filter options are available to allow parents to search for Providers to share their entitlement details with.

The filters and additional fields produce more information to be displayed. See the following screen shot.



## Thirty Hours Administration

Site logo

**Citizen Portal**

Home My Account Sign Out English/Cymraeg

Welcome to the Thirty Hour Entitlement Portal

Using this screen will allow you to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

You can narrow down the list of providers by ticking to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. When you tick to filter by postcode, the postcode shown will be your own postcode but you can change this if required. A distance from box will also be shown this will default to 5 miles initially but can be changed. This allows you to see providers that are 5 miles from that postcode. Once you have entered in the criteria you want to search on please click the Search button.

Once you have found the provider you wish to share your entitlement details with please click the Share button. You can share your details with more than one provider. Please be aware that by sharing your details with the provider doesn't guarantee you a place, the provider will make contact to establish if they are able to accommodate your requirements and agree the next steps.

Provider Name / Service Name
  Service Type
  From Postcode

575 Providers Found
  1116 Services Found
 << Previous 1 2 3 4 5 >> 112 Next >>

Provider Name	Service Name	Service Type	From Postcode	Distance(Miles)	Ofsted Rating	Availability	Share
				NA		Half Term	<input type="button" value="Share"/>
				NA			<input type="button" value="Share"/>

**Note:** the block of text shown on screen can be modified by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources**. For more information, see the **Edit Resources** section in the **General Administration** chapter.

The Search functionality allows the parent to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

The list of providers can be narrowed by selecting to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. If tick to filter by postcode be selected, the postcode shown will be the parents own postcode, but this can change if required. A **Distance (Miles)** from Postcode box will also be shown, this will default to 5 miles initially but can be changed. The providers that are 5 miles from that postcode will be displayed. Once the parents have found the provider they wish to share their entitlement details with then click on the Share button.

Parents can share their details with more than one provider. By sharing their details with the provider doesn't guarantee a place, the provider will make contact to establish if they are able to accommodate the requirements and agree the next steps.

**NOTE:** To be available for selection, a provider must have at least one service with the **Offers Extended Childcare** check box selected in the v4 Client.

The Providers that are currently chosen by the parent/carer to share entitlement details are displayed at the bottom of the screen.

Provider Name / Service Name
  Service Type
  From Postcode

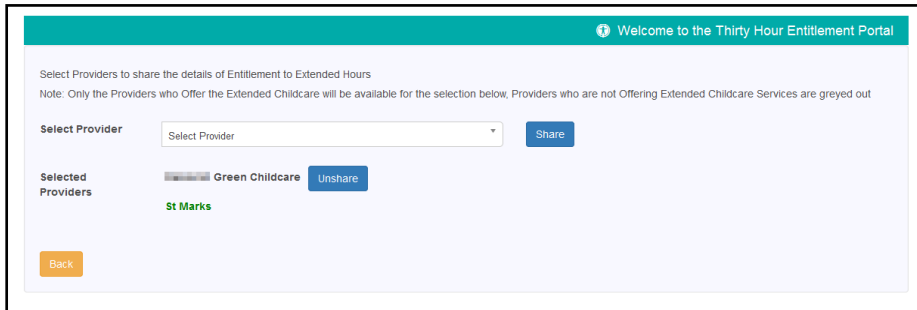
575 Providers Found
  1116 Services Found

Provider Name	Service Name	Service Type	From Postcode	Distance(miles)	Ofsted Rating	Availability	Share
		Sessional Daycare		NA			<input type="button" value="Share"/>

Selected Providers

Sharing the Entitlement details can be stopped by clicking the **Unshare** button to stop sharing with the selected provider.

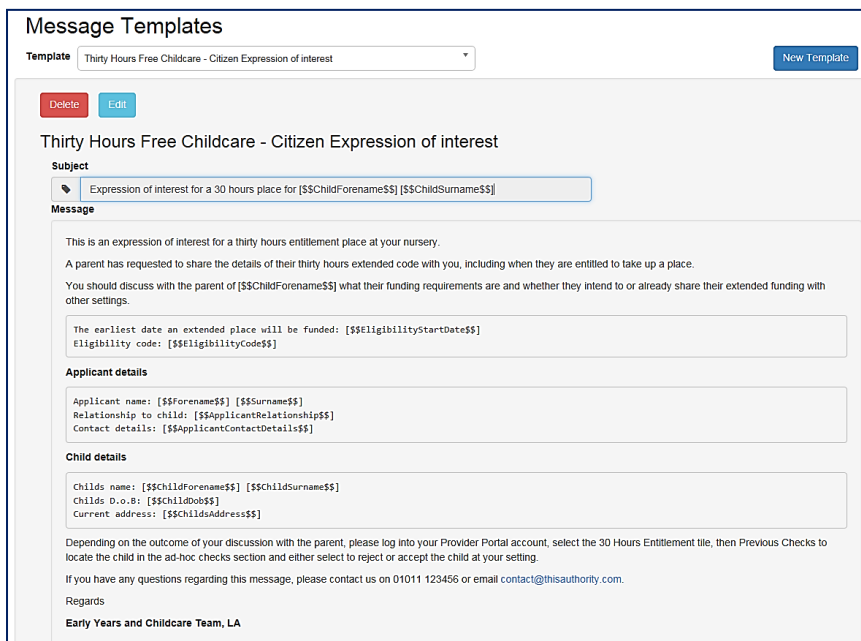
However, If the provider name is highlighted in green means the child is already attending or is going to attend this provider. The parent or carer then cannot unshare the extended entitlement details.



**NOTE:** If a provider name is highlighted in red, the provider has rejected a placement application for this child. The parent or carer can unshare the details with them.

When a Parent selects a Provider with whom they wish to share their entitlement details with an email notification is sent out to that Provider. For the providers to receive this email the local authority will need to select the template called **Thirty Hours Free Childcare - Citizen Expression of interest**, which can be found in the following location:

1. Logon to the Portal as an Admin user.
2. Select **Administration | Message Templates | Template**.
3. Scroll down and select **Thirty Hours Free Childcare - Citizen Expression of Interest** template.
4. The **Contact Details** at the bottom the template must be amended accordingly.



The Template can now be selected in the **30 Hours Free Childcare Configuration** area if required. For more information, see [30 Hours Configuration](#) on page 26.

# 05 | Running a Check

## Introduction

This chapter describes the process that the service provider follows to complete a 30 hours free childcare eligibility check for a child attending the service.

The provider can either search for children who are known to attend one of their services or else perform an ad hoc check by entering the details.

Providers and services are assigned to a user via **Administration | Manage Access**. For more information, see [Managing User Access](#) on page 18.

## Viewing the Audit Log

The EY30H\_CHECK table contains all the check records. An audit log is available by running a query on this table.

**More Information:**

The ERD for the EY30H\_CHECK table is available from the One Publications website

## Setting Up the 30 Hour Check Message

To ensure that the Eligibility dates and Grace Period End dates are displayed in the 30-hour check message:

1. Select **Administration | Text Customisation** to display the **Text Customisation** page.
2. Select **Thirty Hour Entitlement Resources** from the **Choose a text Category** drop-down.
3. Enter **Label\_Result\_Message\_Eligible** in the search box and click the **Search** button.

The screenshot shows the 'Text Customisation' page. At the top, there is a dropdown menu for 'Choose a text Category' set to 'Thirty Hour Entitlement Resources'. Below it is a search box containing 'Label\_Result\_Message\_Eligible' and a 'Search' button. The search results are displayed in a table with the following columns: Category, Description, Key, Text, and Culture.

Category	Description	Key	Text	Culture
Text Resources	Thirty Hour Entitlement Resources	Label_Result_Message_Eligible	This eligibility code is valid from {0} to {1}, with a grace period to {2}.	en
		Label_Result_Message_Eligible2	HMRC will manage the notification to parents of the need to reconfirm their eligibility.	en
		Label_Result_Message_Eligible_CannotChooseProvider	You can not apply for Placements with the Providers since there is no Earliest Date found to take up 30 Hours place.	en
		Label_Result_Message_Eligible_ChooseProvider	Please choose the Provider(s) you would like to check for a Childcare Place, entitlement Details will be shared with the chosen Providers.	en
		Label_Result_Message_Eligible_HasClaimTerm	The earliest start date you can take up Extended Hours funding is {0} {1}.	en
		Label_Result_Message_Eligible_NoClaimTerm	Sorry, No term was found for this child to take up the Extended hours funding.	en
		Label_Result_Message_Eligible_ReConfirm	The parent/carer must re-confirm their eligibility code from HMRC in order to retain their extended hours eligibility between {0} and {1}.	en
		Label_Result_Message_Eligible_ReConfirm_Citizen	You must re-confirm your eligibility code with HMRC between {0} and {1} in order to retain the extended hours eligibility, failure to do this could lead to loss of funding.	en

4. Click the **Label\_Result\_Message\_Eligible** link to edit the **Text**.

The screenshot shows the edit form for 'Label\_Result\_Message\_Eligible2'. The 'Text' field contains the message: 'HMRC will manage the notification to parents of the need to reconfirm their eligibility.'

5. Update the **Text** to the following:  
HMRC will manage the notification to parents of the need to reconfirm their eligibility. This eligibility code is valid from {0} to {2}.
6. Click the **Save** button.

## Running a New Check

A provider can run a check on children that are known to attend one of their services. Alternatively, they can enter the details of a new child and perform an ad hoc check.

**NOTES:** When the child's forename and surname are used to perform an ad hoc check for 30 hours eligibility, if at any time in the future this child is added to the provider via the Headcount portal, the details of the ad hoc check (date of birth and eligibility code) are copied across to the Headcount portal. For more information, see the One Early Years Headcount Provider Portal handbook on the One Publications website.

The Local Authority can use the **30 Hours Free Childcare Configuration** page to configure whether surname and forename are mandatory when performing a check. For more information, see [30 Hours Configuration](#) on page 26

An eligibility code that starts on the first day of term is not eligible for that term. For a check to be eligible for the term, it must have a start date earlier than the first day of the term.

One uses the eligibility code, the child's date of birth and the provider name to verify eligibility.

For payment periods starting on or after the 1<sup>st</sup> January 2018, Extended Hours cannot be claimed when the funding start date for a child falls within the grace period.

### To check if a child is eligible for 30 Hours funding:

1. Select **30 Hours Free Childcare | Run a New Check** on Provider Portal home page to display the **Run a new check** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Run a New Check** button.

If you have access to more than one provider, the following screen is displayed:

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

You are linked to more than one Provider. Please select the provider you are running the checks for from the box below.

2. Select the required provider from the drop-down list. After the Provider is selected the search fields to enter the Child's name will appear.

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code *
e.g. John	e.g. Smith	e.g. 30/11/2012	e.g. NM123456C	e.g. 50001005014

3. To run a check for a child already associated with the provider:
  - a. Enter the child's forename, surname or characters from the name to display a list of children.

**Running a Check**

**Note:** The Date of Birth, Parent's NI Number and Eligibility Code will remain greyed out.

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Child's Forename: [m] Child's Surname: [e.g. Smith] Child's Date of Birth: [e.g. 10/04/2016] Parent's NI Number: [NM123456C] Eligibility Code: [e.g. 50001005014]

Child not found

- b. A tooltip will appear when the child's name is highlighted, displaying the message: 'Click to copy details into the check fields above.'
- c. Click the **View Details** button to see the full details of a Child prior to selection. Click close to return to the search screen.

**Child Details**

Date of Birth : 10/04/2016

Address : [REDACTED]

Parent NI number : AB123416C

Latest eligibility Code : 50001005014

30 hours eligibility start date : 1/9/2019 ('Autumn Term')

Last check run date : 20/5/2020

Eligibility from : 1/1/2018

Eligibility To : 31/12/2020

Grace period end : 31/12/2020

Check Status : Eligible

Close

- d. Click on the required child in the list to copy the details into the check fields.

Run a new check

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Child's Forename: [m] Child's Surname: [e.g. Smith] Child's Date of Birth: [10/04/2016] Parent's NI Number: [e.g. NM123456C] Eligibility Code: [50001005014]

This field is required.

Clear

Run Check

**Note:** All populated fields are inaccessible and cannot be edited. By selecting the **Clear** button will remove the entries in each field to restart the search.

- e. Fill in the remaining details.
- f. After all details have been entered in the correct format the **Run Check** button is enabled and can be selected to run a check.

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

<b>Child's Forename *</b>	<b>Child's Surname *</b>	<b>Child's Date of Birth *</b>	<b>Parent's NI Number *</b>	<b>Eligibility Code *</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="10/04/2016"/>	<input type="text" value="AB123416C"/>	<input type="text" value="50001005014"/>

**Success !**

The earliest start date you can take up Extended Hours funding is 01-Jan-2020 Spring Term.

This eligibility code is valid from 01-Jan-2020 to 31-Dec-2021, with a grace period to 31-Dec-2022.

The parent/carer must re-confirm their eligibility code from HMRC in order to retain their extended hours eligibility between 03-Dec-2021 and 31-Dec-2021.

HMRC will manage the notification to parents of the need to reconfirm their eligibility.

- If the check is **Success!** then click the **Run a new check** button. All previous entries will be cleared to start a new search.
- If a check returns **'Sorry, Not Eligible!'** for a Child that is known to be eligible, then check ECS Settings. This could be set to **'Child Not Found'**.

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

<b>Child's Forename *</b>	<b>Child's Surname *</b>	<b>Child's Date of Birth *</b>	<b>Parent's NI Number *</b>	<b>Eligibility Code *</b>
<input type="text"/>	<input type="text"/>	<input type="text" value="05/05/2016"/>	<input type="text" value="nm123456c"/>	<input type="text" value="50001005014"/>

**Sorry, Not Eligible!**

The checking service has responded that this code is not eligible, please confirm that all the details you have entered are correct.

Amend the ECS settings if required and click **Run a new check** button to re-start the search.

- If the check returns **'Oh dear, something went wrong!'** for a Child that is known to be eligible, then check ECS Settings. This could be set to **'error'**.

## Running a Check

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Child's Forename \*    Child's Surname \*    Child's Date of Birth \*    Parent's NI Number \*    Eligibility Code \*

       05/05/2016    nm123456C    50001005014

**Oh dear, something went wrong !**

**✘** This checking service has responded with an error message. Please attempt to correct the problem and re-try.

Success

An option is available to **Re-run the check** or **Run a new check**.

To Re-run the check, the ECS settings can be changed in v4 Client without leaving this screen as follow:

1. Launch v4 Client and go to: Focus | Early Years | Early Years Setup | EY Pupil Premium ECS Configuration.
2. Scroll down to **ECS Eligibility Status** and change it to Eligible.
3. Click on **Save**.
4. Return to the Run Check screen and click **Re-run the check** button.

*Note: If the check still returns an error then try clearing the cache by selecting **Administration | Cache**, then re-run the check.*

## Ad-Hoc Check

**To run an ad hoc check:**

1. Select a Provider from the drop down list.
2. Enter the child's forename, surname or characters from the name.  
**No Records Found** is displayed on screen.
3. Click the **Child not found** button.

**Run a new check**

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. You may only perform checks where the parent/carer has given consent for you to do so and when they have agreed that this check information can be shared with the Local Authority and any other providers the child attends.

Child's Forename \*    Child's Surname \*    Child's Date of Birth \*    Parent's NI Number \*    Eligibility Code \*

Ann    Bell    e.g. 30/11/2012    e.g. NM123456C    e.g. 50001005014

No Records Found

A popup box appears to confirm you want to add a new Child.

The screenshot shows a web form titled "Run a new check". A modal dialog box titled "Confirm" is overlaid on the form, asking "Do you want to add a new child?" with "OK" and "Cancel" buttons. The background form has the following fields:

Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code *
Ann	Bell	e.g. 30/11/2012	e.g. NM123456C	e.g. 50001005014

Below the form, there is a message "No Records Found" and a green button labeled "Child not found".

4. Click **OK**.
5. Fill in all fields using the correct format.
6. Click the **Run Check** button.

If the check was successful, click **Run a new check** button. The screen will return where another entry can be made against the same Provider selected.

### Changing a Provider

An alert message is displayed if a different Provider is selected, after the details of a Child is entered in the search fields. The message is as shown in graphic below.

The screenshot shows an "Alert" modal dialog box with a blue header. The message inside reads: "If you continue, child details will be cleared". There are "Continue" and "Cancel" buttons at the bottom right.

Select **Continue** will clear all fields. The details for the child can now be entered against the selected Provider.

Select **Cancel** will return to previous screen where you can resume with the check.

For children who are already known to One, the details of the check are displayed on the **Student Details** page in the v4 Client.



## Reviewing Previous Checks

To review the results of previous checks for 30 Hours funding:

1. On the **Provider Portal** home page select **30 Hours Free Childcare | Review Previous Checks** to display the **Checks Run for Ages 2 to 5 Years 6 Months**.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Review Previous Checks** button.

2. Select a **Provider** from the drop-down to display checks that have been run for that provider. The list displays the providers to which you have access.

Checks Run for Ages 2 to 5 Years 6 Months

Use this screen to view checks that you have done.

Filter:  Provider:

**Existing Child Checks**

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
Simon (30/03/2014)	78945612378	01/02/2018	01/09/2017	31/01/2018	31/03/2018	Eligible	No term available.		<input type="checkbox"/> Show All

**Ad-hoc Checks**

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details
David (21/12/2014)	50098765467	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Jan/2018 Spring	✓	Accept Placement, Reject Placement Contact Details
Deborah (12/08/2014)	50098987654	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details
Samantha (30/03/2013)	14725836914	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn		

3. The filter field at the top of the screen (before the Provider) can be used to reduce the list displayed. For example, you can view a check for an individual child, enter their name (or part of their name) into the Filter field. All checks matching the text entered display, as shown in the example below.

Checks Run for Ages 2 to 5 Years 6 Months

Use this screen to view checks that you have done.

Filter:  Provider:

**Existing Child Checks**

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details

**Ad-hoc Checks**

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details

The **Existing Child Checks** panel displays previous checks for children who are known to One. The **Ad-hoc Checks** panel displays checks for children not already known to One.

Checks are run by the provider on the Provider Portal. Checks can also be run by the parent/carer on the Citizen Portal. Checks made on the Citizen Portal, are indicated by a tick in the **From Citizen Portal** check box.

The checks display in date order within each section, with the most recent first.

This purpose of this screen is to display the latest check results and each child should only display once. However, as multiple check runs can be performed for a child, they may display in more than one row, as explained below:

- If a child has more than one eligibility code, these are displayed on different rows. One for each eligibility code.
- If an ad-hoc search has been carried out by a provider and a parent/carer has carried out a search, both checks display in the Ad-hoc checks section. However, once the [request is accepted](#) then only one entry displays.

Checks run between ages 2 and 5 years 6 months

Use this screen to view checks that you have done.

Provider: Silver Provider

**Existing child checks**

Child	Earliest start date for 30 hours place	Eligibility code	Check last run	Eligible from	Eligible to	Grace period end	Check status	From Citizen Portal	Further action needed
June Juneabc (11/11/2016) - AN123456A	01/Sep/2020 Autumn Term	2222222222	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		<input type="checkbox"/> Show all
Junetest Juneabc (12/12/2016) - AN123456A	01/Sep/2020 Autumn Term	2222222222	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		
June Junexyz (12/12/2016) - AN123456A	01/Sep/2020 Autumn Term	2222222222	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		
June Juneabc (12/12/2016) - AN123456A	01/Sep/2020 Autumn Term	2222222222	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		

**Adhoc checks**

Child	Earliest start date for 30 hours place	Eligibility code	Check last run	Eligible from	Eligible to	Grace period end	Check status	From Citizen Portal	Further action needed
Ross cptest (15/05/2017) - NM123456A	01/Sep/2020 Autumn Term	6666666666	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible	✔	<a href="#">Accept</a> , <a href="#">Reject Placement</a> , <a href="#">Contact Details</a>
Ross cptest (15/05/2017) - NM123456A	01/Sep/2020 Autumn Term	6666666666	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		
tina tina (12/12/2017) - AS123456A	01/Jan/2021 Spring Term	4444440000	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		
tina tina (12/12/2017) - AS123456A	01/Jan/2021 Spring Term	5555555555	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		
anu test (30/11/2017) - AB123654A	01/Jan/2021 Spring Term	5555555555	12/01/2021	01/09/2020	31/03/2021	31/08/2021	Eligible		

**NOTE:** The provider can [accept or reject the placement requests](#) and display contact details. For these records, the **Accept Placement**, **Reject Placement** and **Contact Details** links are enabled.

The full history of all check runs for a child can be viewed in the **Eligibility code check history** screen. To access the screen, click the **Eligibility Code** for that child.

## Running a Check

Eligibility code check history

Child	Eligibility code	Check last run	Eligible from	Eligible to	Grace period end	Check status	Earliest start date for 30 hours place	From Citizen Portal	Further action needed
Ross cptest (15/05/2017) - NM123456A	6666666666	12/01/2021 09:43:14	01/09/2020	31/03/2021	31/08/2021	Eligible	01/Sep/2020 Autumn Term		
Ross cptest (15/05/2017) - NM123456A	6666666666	12/01/2021 09:41:44	01/09/2020	31/03/2021	31/08/2021	Eligible	01/Sep/2020 Autumn Term	✓	
Ross cptest (15/05/2017) - NM123456A	6666666666	12/01/2021 09:41:44	01/09/2020	31/03/2021	31/08/2021	Eligible	01/Sep/2020 Autumn Term	✓	

Close

The checks display in date order, with the most recent first.

## Accepting or Rejecting a Placement

Placement requests are submitted by parents and carers using Thirty Hour Entitlement in the Citizen portal. Such records are displayed on the **Review Previous Checks** page with the **From Citizen Portal** check box selected (ticked). Providers can review placement requests and accept or reject them.

If they need to contact the parent, they can display contact details.

If the provider has more than one service, they need to select the required service.

1. On the **Thirty Hour Entitlement Portal** home page, click the **Review Previous Checks** button.
2. Select the required **Provider** from the drop-down to display checks that have been run for that provider. The list displays the providers to which you have access.

Checks Run for Ages 2 to 5 Years 6 Months

Use this screen to view checks that you have done.

Provider: Green Childcare

Existing Child Checks

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
Simon (30/03/2014)	78945612378	01/02/2018	01/09/2017	31/01/2018	31/03/2018	Eligible	No term available.		

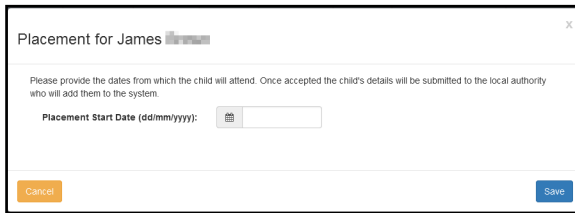
Ad-hoc Checks

Child	Eligibility Code	Check Last Run	Eligible From	Eligible To	Grace Period End	Check Status	Earliest Date to take up 30 Hrs place	From Citizen Portal	Further Action Needed
James (03/03/2013)	65432109876	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details
David (21/12/2014)	50098765467	06/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Jan/2018 Spring	✓	Accept Placement, Reject Placement Contact Details
Deborah (12/08/2014)	50098987654	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn	✓	Accept Placement, Reject Placement Contact Details
Samantha (30/03/2013)	14725836914	02/02/2018	01/09/2017	10/02/2018	31/03/2018	Eligible	01/Sep/2017 Autumn		

If an ad-hoc search has been carried out by a provider and a parent/carer has carried out a search, both checks display in the Ad-hoc checks section. Once the request is accepted then only one entry displays.

To accept a placement request:

- a. Click the **Accept Placement** link to display the following dialog window:



- b. Select a **Placement Start Date**.
- c. If required, select a service.
- d. Click the **Save** button.

*NOTE: When a placement has been accepted, it is processed using the Portal Back Office and is then added to the provider's headcount. The provider's base must be defined as a B2B Student Base in the v4 Client via **Focus | Bases**.*

Alternatively, to reject a placement, click the **Reject Placement** link. The child's record is removed from the grid.



# 06 | Using the Expiration Dashboard

## Introduction to the Expiration Dashboard

The **Expiration Dashboard** is used to alert providers about children who are nearing their eligibility end date and whose parents have not reapplied. The provider can then remind parents to recheck their eligibility.

Colour coding is used to display the number of children whose **Eligibility End Date** has already expired or will expire within the next 28 days. The number of children falling within each category is displayed on the **Expiration Dashboard** button on the 30 Hour Entitlement Portal home page as shown in the following graphic:



The number displayed in red indicates those whose eligibility has already expired. The number displayed in amber is the number due to expire within the next 28 days.

These numbers are also displayed on the **30 Hours Free Childcare** tile on the Provider Portal home page. The number in the black circle is the count of parents who have selected to share their entitlement details, as shown in the following graphic:



The dashboard also displays the earliest date that a child can take up a 30 Hours place.

Entitlement Expiration Dashboard									
Use this screen to track eligibility which is due to expire.									
Further Action Needed		Yes	Days	180	Eligibility Filter	Grace Period Ending in the next 180 days	Search		
Provider		Green Childcare							
Filter using any keyword									
Child	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Earliest Date to take up 30 Hrs place	Notes / Further Action Needed		
Simon (30/03/2014)	78945612378	01/09/2017	31/01/2018	31/03/2018	01/02/2018 Eligible <a href="#">Recheck now</a>	No term available.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Update</a>
Samantha (30/03/2013)	14725836914	01/09/2017	10/02/2018	31/03/2018	02/02/2018 Eligible <a href="#">Recheck now</a>	01/09/2017 Autumn	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Update</a>
David (21/12/2014)	50098765467	01/09/2017	10/02/2018	31/03/2018	13/02/2018 Eligible <a href="#">Recheck now</a>	No term available.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Update</a>

## Displaying Children whose Eligibility is due to Expire

The **Expiration Dashboard** initially displays a list of children whose grace period ends in the next 180 days and further action is required.

Providers can filter the list of children displayed based on their **Eligibility End Date** or **Grace Period**.

**NOTE:** The filters set on this page do not affect the numbers displayed on the **Expiration Dashboard** button or the **30 Hours Free Childcare** tile.

1. On the Provider Portal home page, select **30 Hours Free Childcare | Expiration Dashboard** to display the **Entitlement Expiration Dashboard** page.

Alternatively, on the **Thirty Hour Entitlement Portal** home page, click the **Expiration Dashboard** button.

Entitlement Expiration Dashboard  
Use this screen to track eligibility which is due to expire.

Further Action Needed: Yes ▾ Days: 180 Eligibility Filter: Grace Period Ending in the next 180 days ▾ Search

Provider: Anu Providers ▾

Filter using any keyword

Child	Earliest Date to take up 30 Hrs place	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Notes / Further Action Needed
No records found.							

2. If required, the filters can be updated as follows:
  - a. Select an option from the **Further Action Needed** drop-down to display children needing further action, children not requiring further action or any children.
  - b. Enter the number of **Days** to be used in the **Eligibility Filter**.
  - c. Select an **Eligibility Filter** from the drop-down list.
  - d. Click the **Search** button to display a list of children matching the specified filters.
3. An **Eligibility Filter** called **Eligibility has ended but code is still in grace** is available for selection which will produce a list of children that are still in their Grace period despite their eligibility has ended. An example of this can be seen in the graphic below.

*Note:* A configuration option is available to allow local authorities to set a default value for The Eligibility Filter and number of Days. For more information see [30 Hours Configuration](#) page26

Entitlement Expiration Dashboard  
Use this screen to track eligibility which is due to expire.

Further Action Needed: Any ▾ Days: 180 Eligibility Filter: Eligibility Ending in the next 180 days  
Grace Period Ending in the next 180 days  
Grace Period Expired in the last 180 days  
Eligibility has ended but code is still in grace Search

Provider: Early Years Penetration Provider ▾

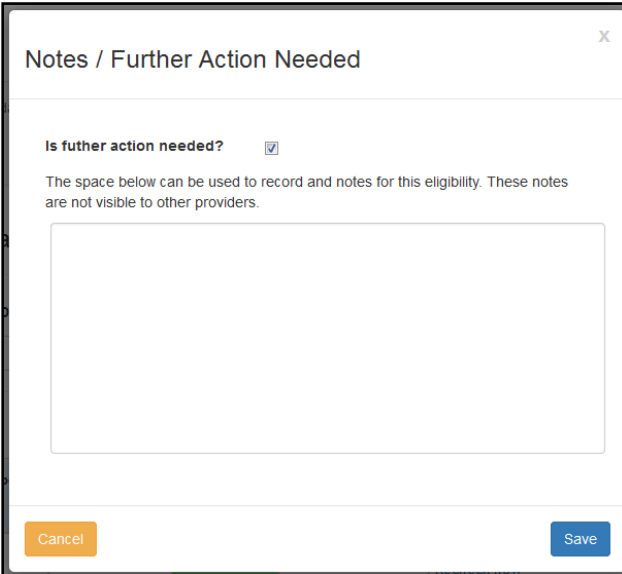
Filter using any keyword

Child	Earliest Date to take up 30 Hrs place	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Notes / Further Action Needed
Simon Baily (12/10/2014)	01/09/2018 Autumn Term	75315985245	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	📄 ✓ Update
Sam Boon (12/10/2014)	01/09/2018 Autumn Term	95115995115	01/09/2018	31/12/2018	31/03/2019	21/08/2018 Eligible Recheck now	📄 ✓ Update

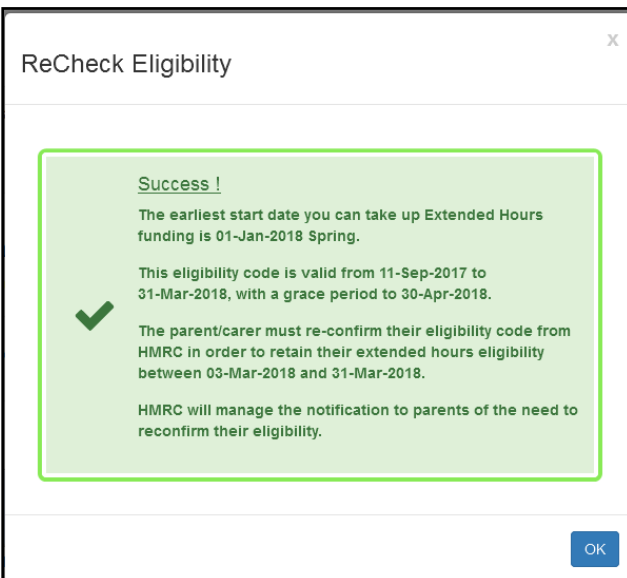
The column order displays the Earliest Date to take up 30 Hrs place before eligibility start date.

The **Eligible To** date is displayed using the following colours:

- Red - eligibility has ended.
  - Amber - eligibility ends in the next 28 days.
  - Green - eligibility ends in more than 28 days.
4. If required, click the **Update** link to display the **Notes / Further Action Needed** dialog. This enables providers to set a flag against a check record if further action is not required, so that they no longer receive alerts about the record.



- a. If required, deselect the **Is further action needed?** check box.
  - b. If required, enter notes.
  - c. Click the **Save** button.
5. If required, to perform an eligibility check:
- a. Click the **Recheck now** link to display the following dialog.



- b. Click the **OK** button.



## Using the Expiration Dashboard

**NOTE:** The check displayed on the dashboard is the most recent eligible check for each child and the **Is further action needed** indicator only applies to that check record.

When a recheck is performed, if an ineligible check is returned, this does not affect the **Is further action needed** indicator. If there is a new eligible check (manual or recheck), the new check record supersedes the old one.

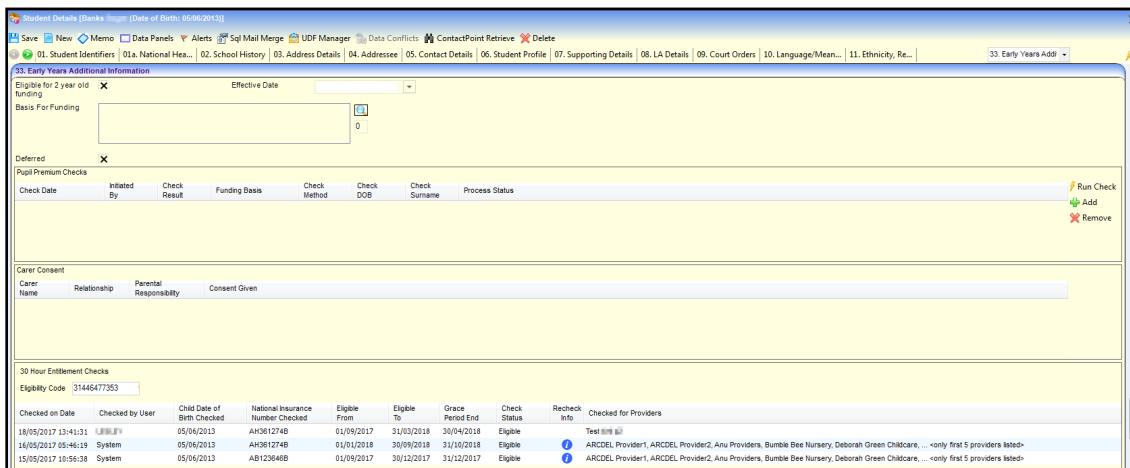
Once the recheck period has finished, the indicator will not change unless there is a manual eligible check.

# 07 | Updating Student Details in One v4

## Introduction

When a 30 Hour entitlement check is performed in the Provider portal for a child who exists in the One v4 Client, the details are used to update the student details record. The **Student Details | Early Years Additional Information** panel is updated with the **Eligibility Code** and the following information about the check:

- Checked on Date
- Checked by User
- Child Date of Birth Checked
- National Insurance Number Checked
- Eligible From and To dates
- Grace Period End date
- Check Status
- Checked for Providers.



**NOTE:** The eligibility code is unique to a student. All checks performed for this child with this eligibility code are listed on the **30 Hour Entitlement Checks** sub-panel.

## Merging Children Records in One v4

You can merge duplicate child records if only one record has the full extended entitlement information or any of the following extended entitlement information:

- Child’s eligibility status
- Child’s eligibility code
- Child’s check status
- Start, End and Grace Period dates of the child’s eligibility
- Child’s recorded attendance hours.

**NOTE:** *If child records have been matched and both records have the full or partial extended entitlement information and it is conflicting in these areas, the child records are not merged. An alert is displayed to prompt the user to select the required record.*

If it is necessary to merge duplicate child records, the 30 hours eligibility information is retained as follows:

If neither child has an eligibility code, then the child record being kept does not have a code.

If only one child has an eligibility code, then the child record being kept will have that code added or retained.

If both children have an eligibility code, then the child record being kept will keep their original code.

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