Provider Portal User Guide

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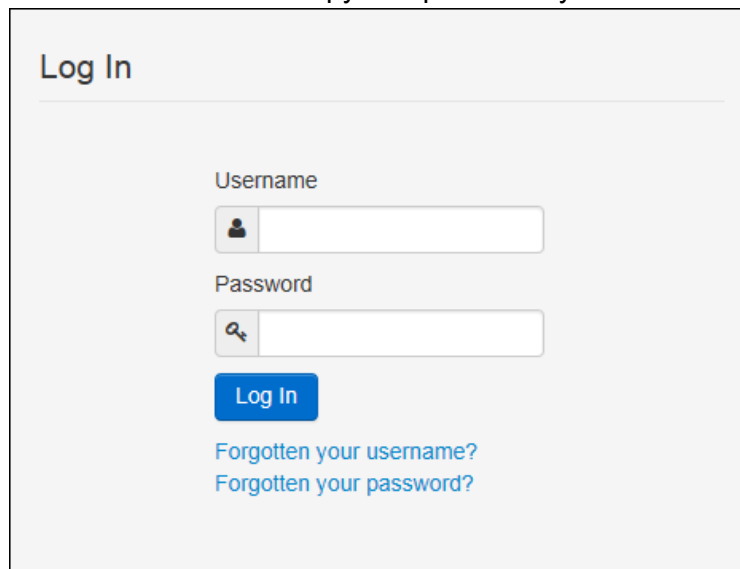| Document Owner	David Allais
Date last reviewed	2022/06/22
Date of next review	2023/06/01

SECTION 1 – LOGIN TO THE PROVIDER PORTAL

Logging in for the first time

Using the Web Address provided in your email.

https://oneservices.bracknell-forest.gov.uk/ProviderPortal/Account/Account/Login

Select the address or copy and paste into your Internet Browser address bar.
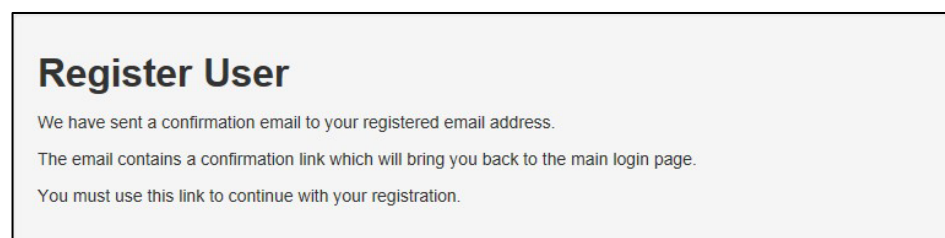
Login to **Provider Portal** by completing the username and password fields on the login box; then select **Log In**

The first time you login you will be redirected to an information page advising you that an email has been sent to your registered email address. This email contains a confirmation link which you must select to continue your registration. This is to ensure security.
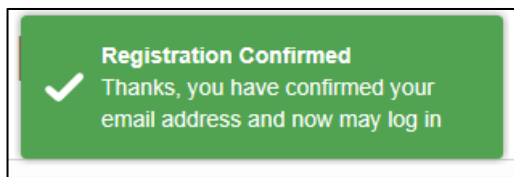

On each subsequent login to the Provider Portal, you will be directed to the Homepage as detailed in section 2.

After following the Web Address sent in the confirmation email you will see a confirmation message displayed.

Registration Confirmed
Thanks, you have confirmed your email address and now may log in

Selecting the link will take you back to the main login page where you will be required to login again.

Change Password

Your password must be changed to allow access to the portal.

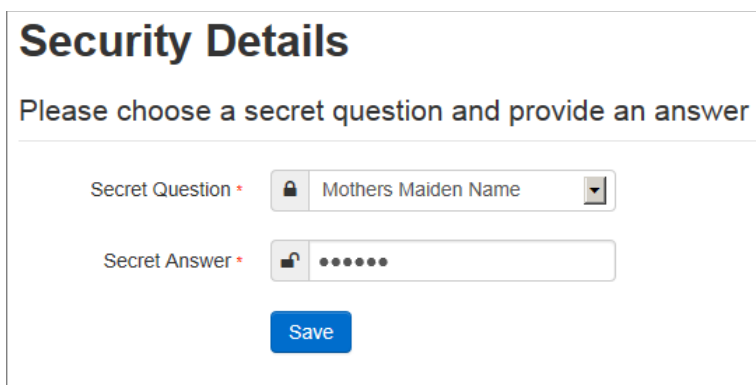| Current password * | | •••••••• |
| New password * | | •••••••••• |
| Confirm new password * | | •••••••••• |

Change password

Complete the current password, this is the password you were sent by the Early Years Team when you registered for the Provider Portal.

You will be prompted to change your password to a memorable one, this must contain at least 8 characters; and must contain Upper Case, Lower Case, a Special Character and Two Numbers. E.g. **Password01@**

Please do not use Password01@, this is only an example.

After you have completed the current password, new password, confirm new password fields select **Change password.**

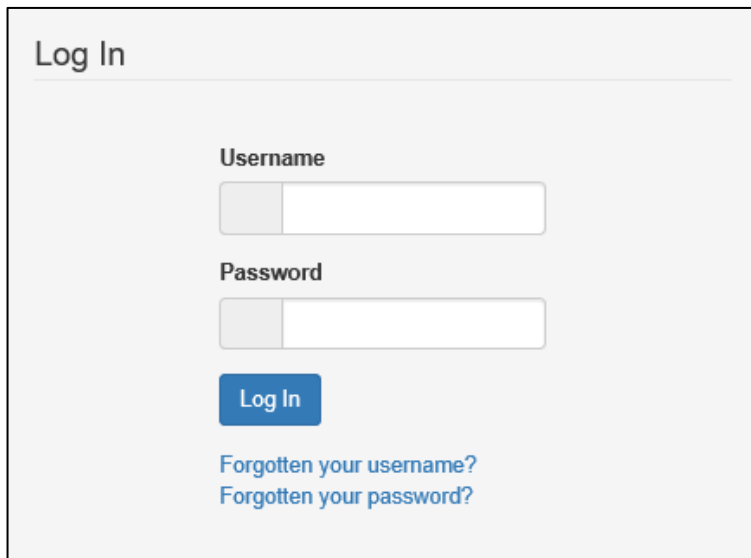You will now see the Security Details prompt. Select a secret question and provide a memorable answer; then select **Save**

Security Details

Please choose a secret question and provide an answer

| Secret Question * | | Mothers Maiden Name |
| Secret Answer * | | •••••• |

Save

Congratulations you have now successfully logged in for the first time and will have access to the Provider Portal.

Forgotten username, password, or secret question

If you forget your username or password, select **Forgotten your username?** or **Forgotten your password?** on the login page to use the automated username and password recovery options.

If you can't remember the answer to your secret question, click on **Forgotten your secret answer?** and you will be taken through an automated recover process.

You will be asked for, and need access to, the email registered to your Provider Portal account to complete these automated processes. Contact the Early Help Team if you have any issues recovering your username, password, or secret answer.

If you enter an incorrect password or secret answer three times in a row your account will be locked. Email or phone the Early Years Team who will assist you in resetting your account.

Announcements
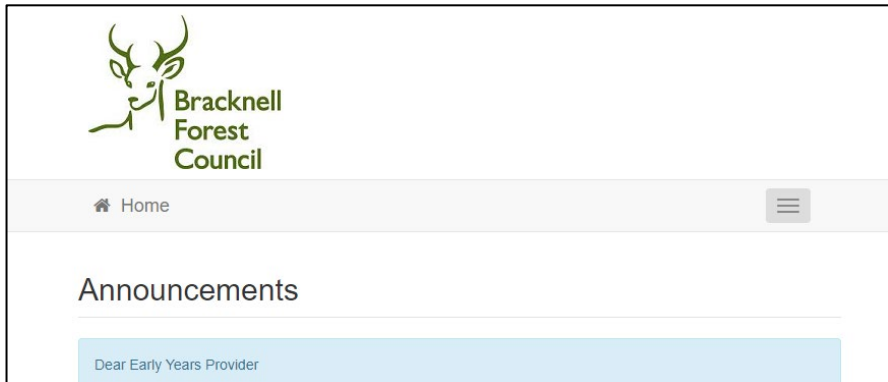
The Announcements page will be visible at every logon, please read the announcements carefully as the Early Years Team will provide information about upcoming tasks, deadlines, training opportunities and other useful information here; select **Continue** to proceed to the Homepage.

Provider Homepage

The Provider Homepage provides access to all the services available to you, which can be accessed by using the drop down lists at the top of the page or the buttons as the bottom of the page.

Selecting on your name; Top Right, brings up a menu where you can change your own password or secret question, and log out securely
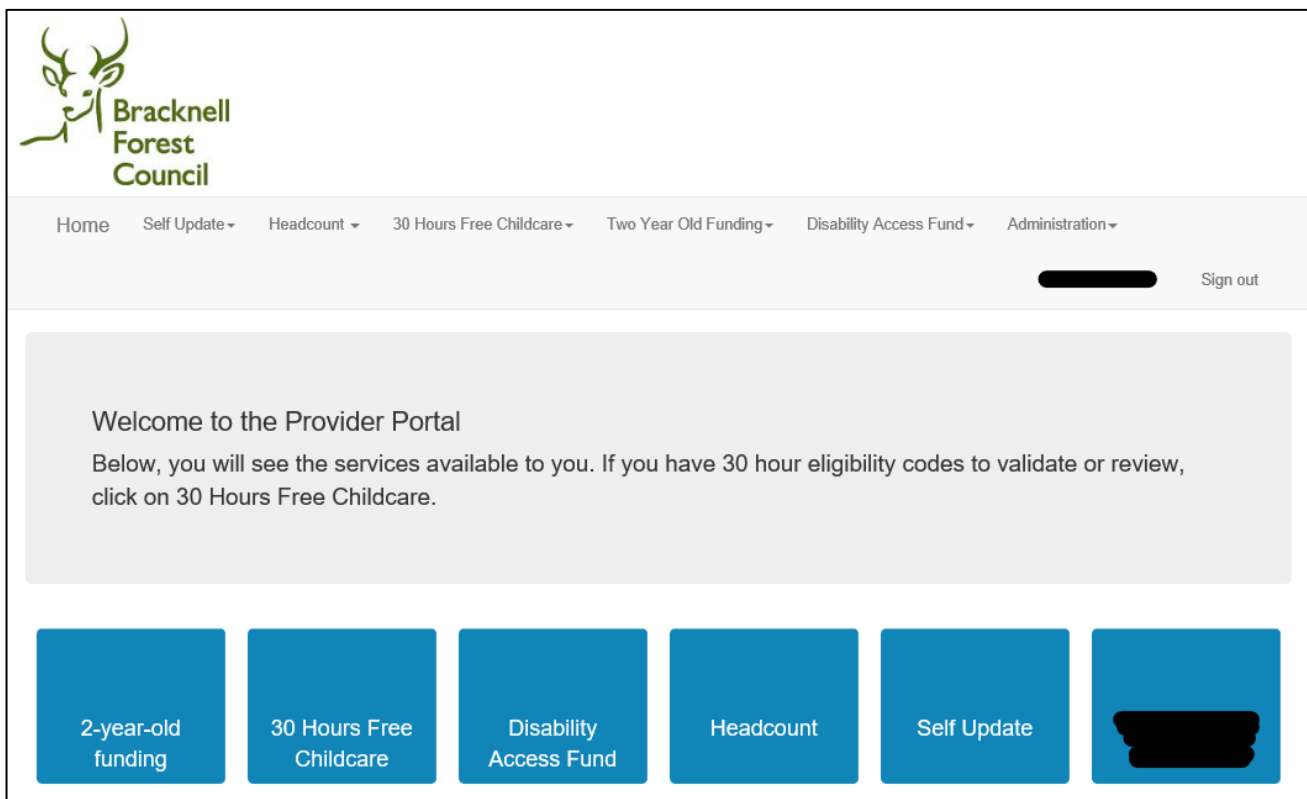
SECTION 2 – HEADCOUNT

To Access the Headcount section of the Provider Portal, select the **Headcount** button on the home page or use the drop down list under Headcount at the top of the page and select **Provider Home.**

The Headcount section of the Provider Portal is used to submit your early years free entitlement funding claim to the Council. You will complete a series of Tasks each term in line with the published funding process. Details of the funding process is available on the Bracknell Forest Council website https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/information-early-years-providers/funding-information-early-years-providers

HEADCOUNT HOMEPAGE

The homepage has headcount tasks on the left and headcount messages on the right. When you first log in you may not have any task or messages.
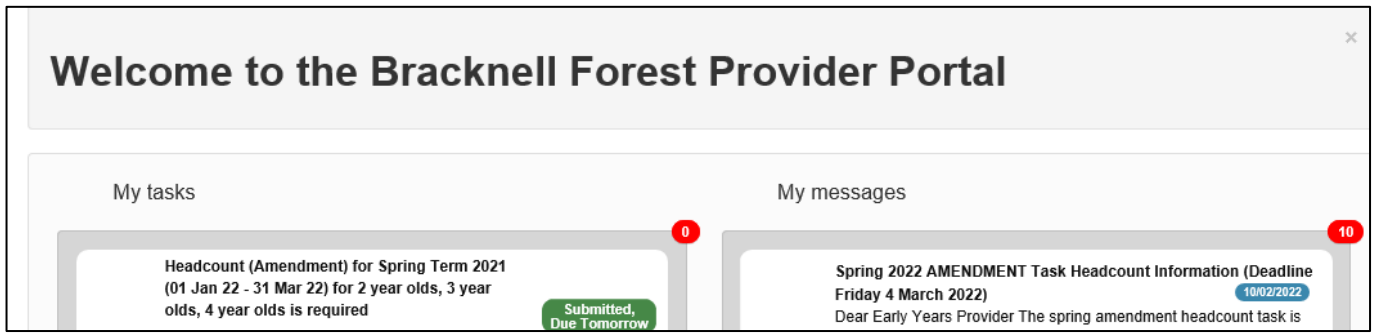
Selecting the Headcount drop down list; Top Left, brings up a menu where you can access any reports that have been provided.
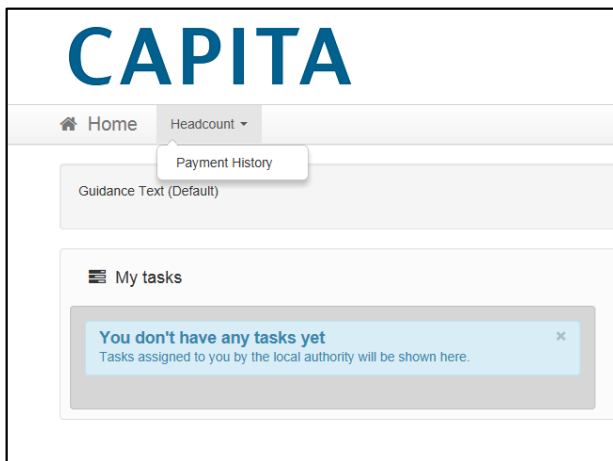
If this page is empty, either no reports have been issued to your setting or old ones have been cleared out.

MESSAGES

Access to the various sections of the portal may vary from user to user. To ensure that users only have access to the messages relevant to their access rights, each section of the portal has its own area for messages.

You will receive an email when a message has been issued to you. The subject line of the email will tell you which section of the portal to look in to find the message. For messages issued in the Headcount section of the portal, after you login you will see the message on your Headcount Homepage.

Selecting a message in the list allows you to read and if required, delete this message.

Messages will stay in your messages list until you delete them. There is an icon to the left of each message which indicates which messages have been read (symbol of a page) and which are unopened (symbol of an envelope). The red icon with a number on the top right of the messages pane shows home many messages are unread.
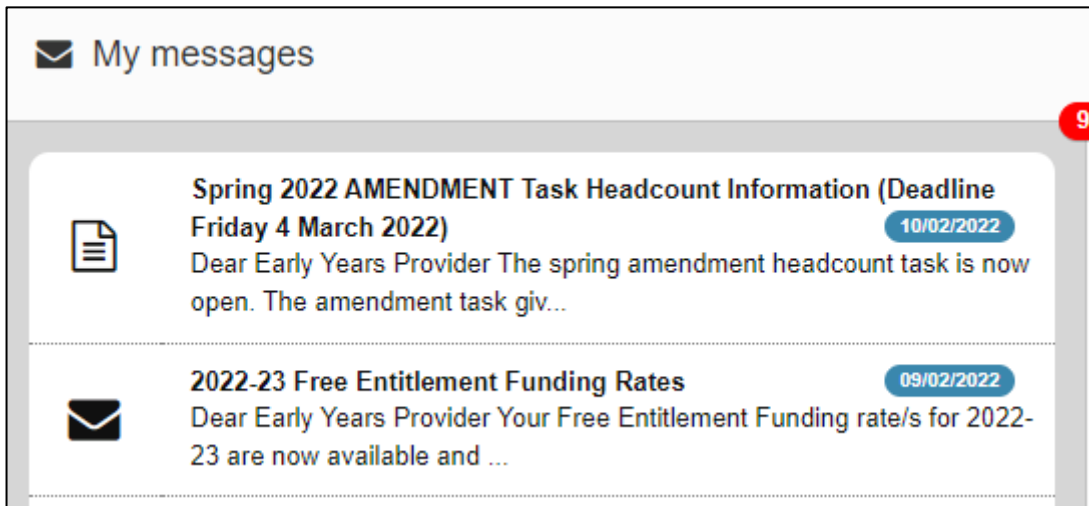
HEADCOUNT TASKS

When a Headcount Task has been issued to your Nursery, all provider portal users in your setting with permission to process tasks will receive an email informing that the task is open. Once you login to the Headcount Portal you will see the Task on the left of your Homepage.
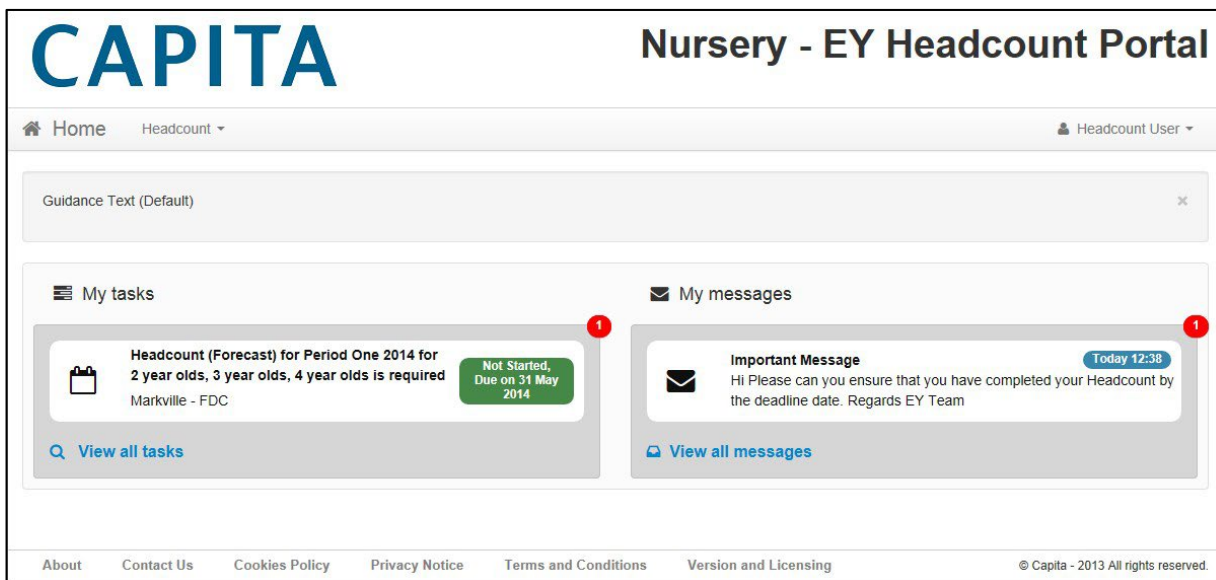
The Task has a Due Date for submission shown in the lozenge, the colour and information on this lozenge changes to show the status. It will change to Amber and Red the nearer it gets to the Due Date, changing to Grey when the Due Date expires; examples below.
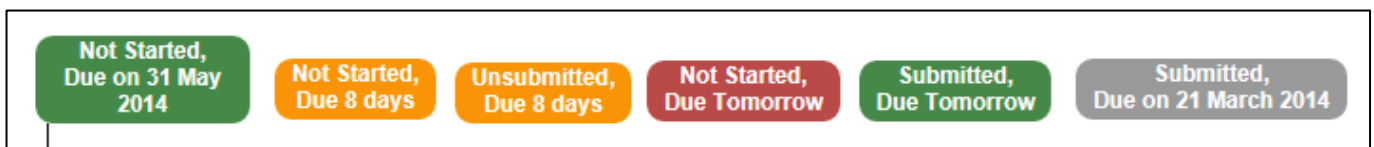
Selecting an expired Task allows you to see the historic information for that Task

Selecting a Task in the left-hand pane opens the Task.

Note the two coloured lozenges on the top right provide additional information about the status of the task and the deadline for the task. These lozenges are colour coded as follows

Status lozenge:
- Green = task submitted
- Amber = task started or amended but not resubmitted
- Red = task not started

Deadline lozenge - will change colour from green to Amber and Red the nearer it gets to the Due Date, changing to Grey when the Due Date expires.

A Task may contain existing children or be empty depending on what data is held by the Early Years Team. If you have previously submitted data about funded children attending your setting, the Task will show you the information for all children eligible for the Task held by the Early Years team at the time the Task was created.

You update, add children to, and submit your Task by interacting with the four blue buttons at the top of the Task.
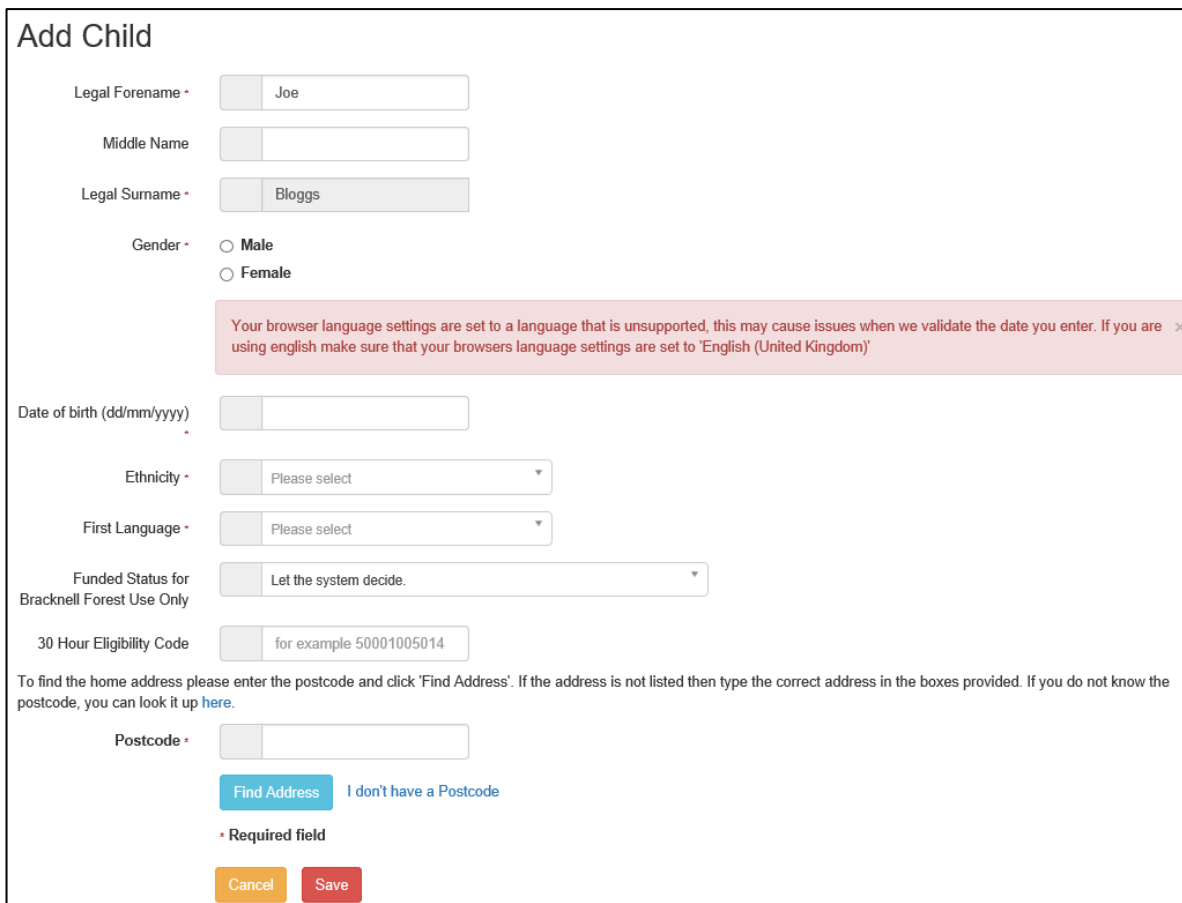
Add Child

To add a child to your Headcount Task, select the **Add Child** button.

This will open a new screen. Enter the child's legal forename and surname (as per the birth certificate or passport) and the press **Next** to open the child details screen.

> **The warning message in the image below indicates that your browser language settings are not set to English (United Kingdom). You are advised to change your browser language setting to English (United Kingdom) before entering any child details.**

Choose the child's Gender and enter their Date of Birth, Ethnicity, First Language

> **Do not change the 'Funded Status' field, this is for use by Bracknell Forest Council staff only**

If relevant, add the child's 30 hour Eligibility Code

Complete the Postcode field and select **Find Address**, all available addresses for that post code will be returned.

> **If you have the address but not the post code, look up the post code on the Post Office website by clicking on the link above the Postcode box (circled in red below)**

If the correct address is returned select it from the list.

If no suitable addresses are returned, select **Enter Address Manually,** and type the new address in

Once you have completed the child information select **Save** to store the details

If the child is aged 3 or 4 you will be prompted with a message to add the Carer information.

Check Step 3 of the child's Parent Declaration Form.

- If the parent has ticked **Yes** for the Early Years Pupil Premium check, select **Yes** on the Carer Details page to expand the Carer entry page where you will be prompted to provide further details

- If the parent has ticked **No** for the Early Years Premium check, select **Decline to provide** to proceed without the carer details

Children eligible for the Early Years Pupil Premium receive additional funding. The current funding rate for EYPP can be found on the Bracknell Forest website https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/information-early-years-providers/funding-information-early-years-providers/funding-rates

Populate the Carer Name, Gender, Date of Birth, Relationship, Parental Responsibility, NI or NASS Number and Address.

You can add Additional Carers by selecting **+ Add Another Carer.**

Completing the process by selecting **Save.**

You will be returned to the Headcount Task homepage. The child you have added will be visible in the list of children in the task.

Keep repeating this process until you have added all relevant children

Edit Headcount

To add or amend a funding claim for a child in the Headcount Task, select **Edit Headcount.**

A new screen will open which allows you to edit the funding information for each child.

The portal inserts a default start date, leave this date unchanged if the child attended your setting from the start of the term. Change the date to the first day the child attended your setting if they started after the start of the term.

You only need to insert an end date in two circumstances:
1. You are sure the child is leaving your setting – insert the last date the child will attend your setting
2. The hours per week claimed for that child change part way through the year – see the section on Icons below about adding an additional attendance line.

The **Stretched Offer** field should only be completed if you are stretching your claim over more than 38 weeks per year. Please see the Bracknell Forest Council website for information on stretching your offer https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/information-early-years-providers/funding-information-early-years-providers/suggested-weeks

Universal hours = 15 hours universal entitlement
Extended hours = 30 hours extended entitlement

Weeks Claimed for term must be completed to claim funding. For more information about the number of weeks to claim for the term, refer to the Bracknell Forest Council website https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/information-early-years-providers/funding-information-early-years-providers/suggested-weeks

Hours Attended per week
Should be the total number of hours, funded and fee paying, that the child attends your setting per week.

Hours Attended for term
Will autocomplete once the weeks claimed for term and hours attended per week are completed

When you complete '**Hours attended per week'** the portal will assign the hours to the universal hours claimed column first. For example
15 hours attended = 15 universal hours + 0 extended hours
25 hours attended = 15 universal hours + 10 extended hours
30 hours attended = 15 universal hours + 15 extended hours

This is the default behaviour for the portal, providers will need to check and amend the universal and extended hours claimed to match the parent declaration form.

Universal Hours Claimed per week
Enter the total number of universal hours per week that you want to claim for the child in the relevant term. This should match the Parent Declaration Form

Universal Hours Claimed per term
Will autocomplete once weeks for term and universal hours per week are completed.

Extended Hours Claimed per week
Enter the total number of extended hours per week that you want to claim for the child in the relevant term. This should match the Parent Declaration Form

Extended Hours Claimed per week
Will autocomplete once weeks for term and extended hours per week are completed.

When you have completed updating the task Select **Save**

The Provider Portal will time out after a period of inactivity, remember to select **Save** regularly in case you are interrupted.

In order to claim 30 hours funding a 30 hours eligibility check must have been successfully completed and the code linked to the child. Where these criteria have been met, there will be an **EH** in the funding column and you will be able to edit the extended entitlement hours claimed fields.

If you have confirmed the 30 hours eligibility code and the **EH** is not present or there are no editable Extended Entitlement hours field, you may need to link the eligibility code to the child's record.

To link the eligibility code to the child's record, click on the child's name or the blue View Child icon before their name on the headcount page to access the child's details.

Halfway down the page is an eligibility code field.

Enter the child's eligibility code into the field and press **Save**.

The funding column for the child will now show the 'EH' and the extended hours columns can now be accessed.

The forecast task will not ask for Hours attended per week or Hours attended for term.

Pressing **Save** will return you to the front page of the headcount task.

Tasks remain available for viewing after they have closed. You can always go back and check to see old funding claims. You can save a copy of the data in your claim by clicking **Download** on the task homepage

Icons

The provider portal uses Icons to provide additional information, give access to information, provide warnings and enable access to additional actions.

View Child
The first column on the task screen has a View Child icon for each line with a child record. Selecting the icon opens the Child Details Screen.

When completing a Task, any 3- and 4-year-old children highlighted in red with a red View Child icon (circled above) will need to have their Carer Details screen updated, either with the Carer details added or Declined for the EYPP checked before you can submit the Task. To access the Carer Details screen, select the View Child icon or click on the child's name, then select the Carer Details tab. See the section **Add Child** for more guidance.

Funding Column
Icons in the Funding column provide additional information relevant to that child
- **2** indicates a child who is or was eligible for two-year-old funding
- **EH** indicate a child eligible for the extended 30 hours free entitlement. The background colour changes based on eligibility dates and is the same colour as the **'Eligible to date'** in the expiration dashboard. (see Section 4 - 30 hours Entitlement)
  - o **GREEN** indicates an eligible to date more than a month in the future
  - o **AMBER** indicates a code that will expire in the next month
  - o **RED** indicates a code that has expired

- **S** on an amber background indicates a child who might be claiming free entitlement funding with more than one provider in the current term, and on a black background indicates a child who claimed free entitlement funding with another provider in a previous term.
- **P** indicates a child who is eligible for the Early Years Pupil Premium

Examples of all these icons can be seen below

✏	██████████	EH	15/10/2018	3	01/01/2022		12.00	15.00	180.00	7.50	90.00	✕	⬔
✏	██████████	P 2	26/10/2017	4	16/03/2020		12.00	15.00	180.00			✕	⬔
✏	██████████	P 2	17/10/2018	3	06/01/2021		12.00	15.00	180.00			✕	⬔
✏	██████████	2	12/11/2019	2	04/01/2022		12.00	15.00	180.00			✕	⬔
✏	██████████	P 2	09/01/2018	4	22/04/2020		12.00	15.00	180.00			✕	⬔
✏	██████████		17/07/2018	3	01/04/2022		12.00	14.00	168.00			✕	⬔
✏	██████████	S 2	23/12/2019	2	01/01/2022	01/04/2022	12.00	0.00	0.00			✕	⬔
✏	██████████	2	07/03/2020	2	20/04/2022		12.00	14.00	168.00			✕	⬔
✏	██████████	2	18/01/2019	3	06/09/2021		12.00	15.00	180.00			✕	⬔
✏	██████████		21/01/2019	3	01/04/2022		12.00	15.00	180.00			✕	⬔
✏	██████████	2	29/07/2019	2	01/09/2021		12.00	15.00	180.00			✕	⬔
✏	██████████	S 2	10/10/2019	2	20/04/2022		12.00	12.00	144.00			✕	⬔

Add New Attendance Line

The last column on the right of each child's record that looks like 2 pages is the New Attendance Line icon. Selecting this icon will open a new attendance line for the relevant child record. This is useful when a child has changed their funding claim part way through a term. For example, 4 weeks at 10 hours and 8 weeks at 15 hours.

The first line must be for the first period of attendance and must have a leaving date before the start date of the second line.

Delete Line

The second to last column in each child record is a cross. This is usually greyed out and hovering over the icon brings up the message *'Submitted/Imported/First attendance line cannot be deleted for (name of child)'.* Clicking on a greyed-out icon has no affect.

If you have added a child or a second attendance line and you have not submitted this addition/change to the Council, the cross will be black. Clicking on the icon will delete that line allowing you to remove a child or attendance line added in error.

The cross is greyed-out once you submit the information in that line and the option to delete is no longer available.

HEADCOUNT SUBMISSION

Clicking on **Save** as described in the previous section will save the data you have entered onto the Provider Portal. You still need to send the data to the Council, to do this click on **Submit.**

A new screen will open with a declaration regarding the data you are submitting. To agree to the declaration, click **Confirm**

A pop-up window will open asking you to confirm your submission. Click **Yes** to submit the data or No to cancel the submission.

After clicking **Yes,** you will see a notification message confirming the submission.
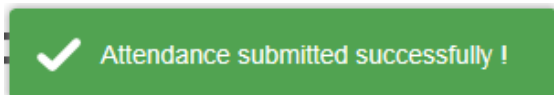
You can continue to add children and hours or make changes to the information you have submitted until the task deadline, with the latest submission overwriting any previous submissions for that task. Once the deadline for the task has passed the task will become read only.

SECTION 3 – REPORTS

When the Early Years Team send you a Report, you will receive an email informing you that you have a new message waiting for you in the Headcount section of the Portal.

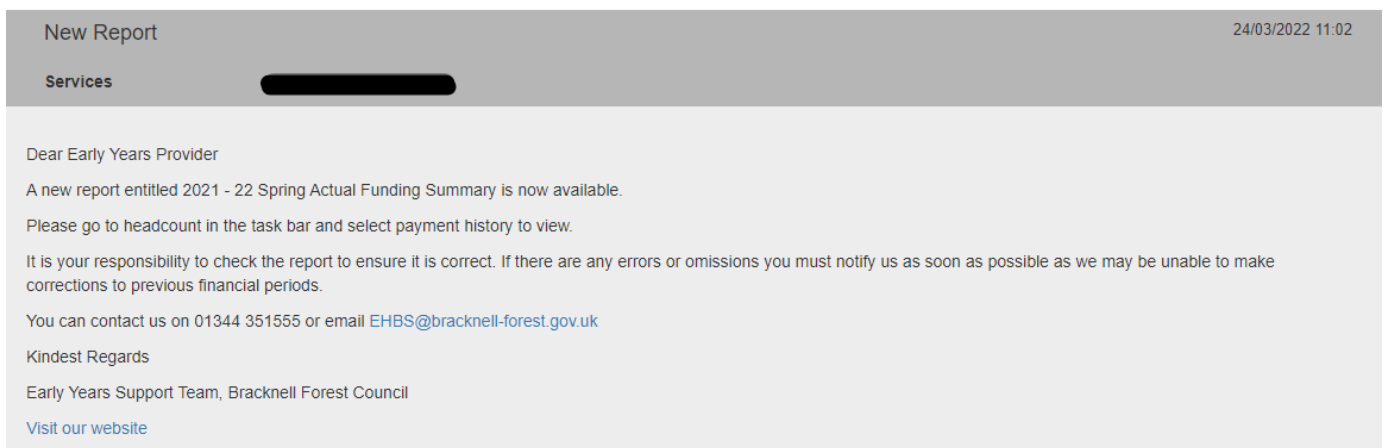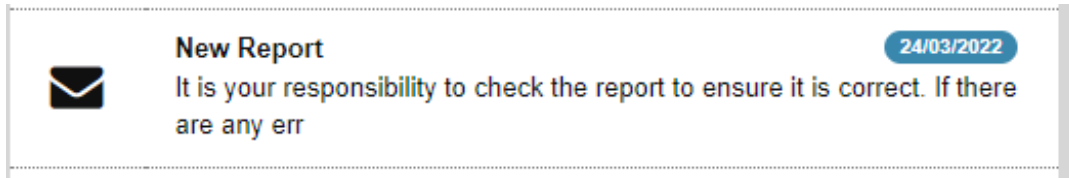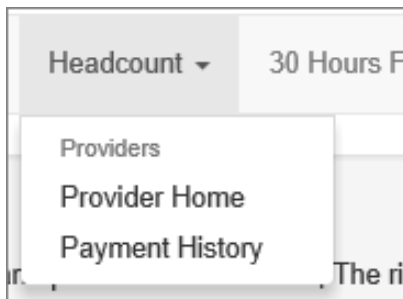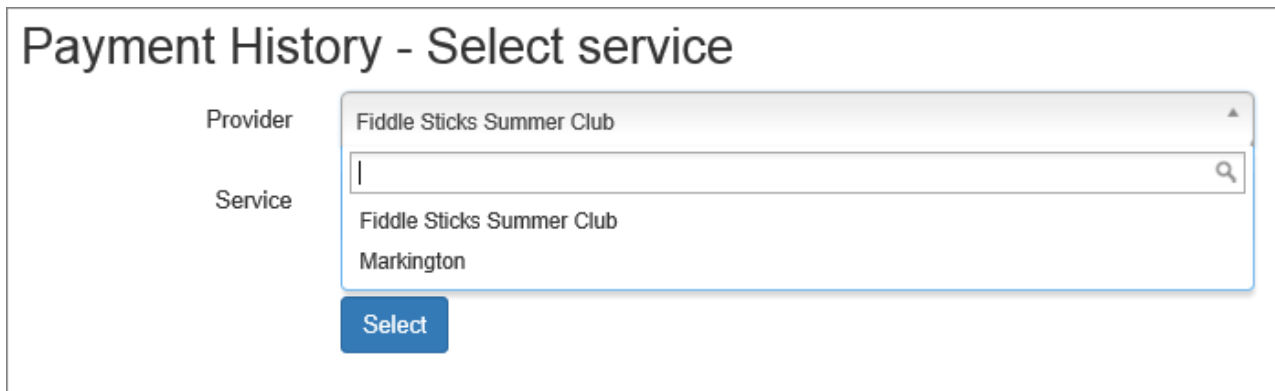Login to the Portal and go to your Headcount Page you will see a message informing you of the report details and how to access the report, this message can be read and deleted if no required.

New Report   24/03/2022
It is your responsibility to check the report to ensure it is correct. If there are any err

New Report   24/03/2022 11:02

Services

Dear Early Years Provider

A new report entitled 2021 - 22 Spring Actual Funding Summary is now available.

Please go to headcount in the task bar and select payment history to view.

It is your responsibility to check the report to ensure it is correct. If there are any errors or omissions you must notify us as soon as possible as we may be unable to make corrections to previous financial periods.

You can contact us on 01344 351555 or email EHBS@bracknell-forest.gov.uk

Kindest Regards

Early Years Support Team, Bracknell Forest Council

Visit our website

Select the Headcount | Payment History **menu item at the top of the screen**

Headcount ▾   30 Hours F

Providers
Provider Home
Payment History

If you are linked to Multiple Nurseries or Services you will need to select the one that has the relevant report, by choosing the Nursery from the dropdown and using the **Select** button to display the reports

Payment History - Select service

Provider   Fiddle Sticks Summer Club

Service
            Fiddle Sticks Summer Club
            Markington

Select

Any reports that you have access to will be visible

Payment History

Markington - Sessional Daycare

`1 Report(s)`

Report Date	Description	Actions
25/10/2017	Mg Task Name	View Report

Back

Selecting **View Report** will open another window and load the report which may be different to the sample below

Free Entitlement Funding Summary for Early Education :

-

This report details a breakdown of the funding that you can have received for the funding period.

Funding Summary

Weeks Per Term:

|	2 Year Olds	3 Year Olds	4 Year Olds	Over 4
Unit Cost by Age per Hour (B)	£	£	£	£
Total Paid Hours per Term (C)				
Total for the Period (D = B x C)	£	£	£	£
Actual Payments	£	£	£	£
Total Actual Amount Payable				£
Total Payment For Period				

Note: Reports can be printed or saved if necessary, however, to view the report again you can repeat the above steps at any time to access current or historic reports

SECTION 4 – 30 HOURS FREE CHILDCARE

It is the responsibility of the provider to check the validity of 30 hours codes before agreeing to provide the 30 hours extended entitlement.

Checking Eligibility Codes

To access the 30 Hours Headcount section of the Provider Portal, select the **30 Hours Free Childcare** button on the home page or use the drop down list under 30 Hours Free Childcare at the top of the page and select **Provider Home.**
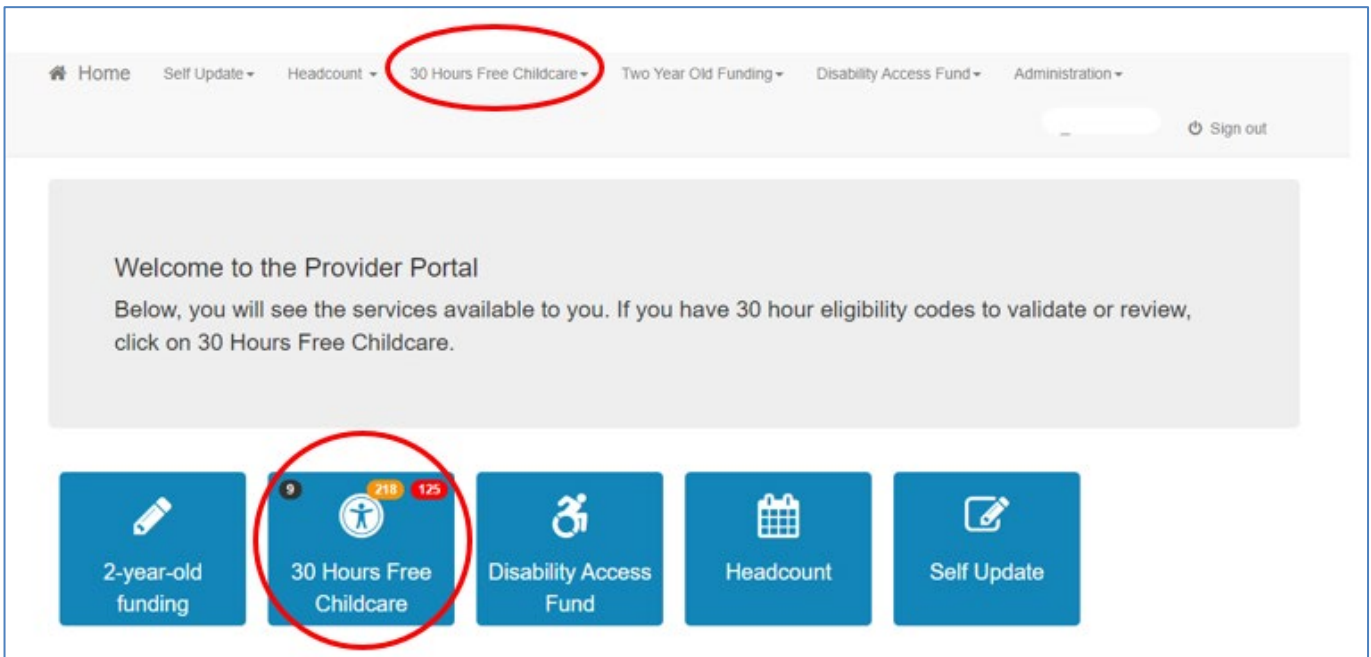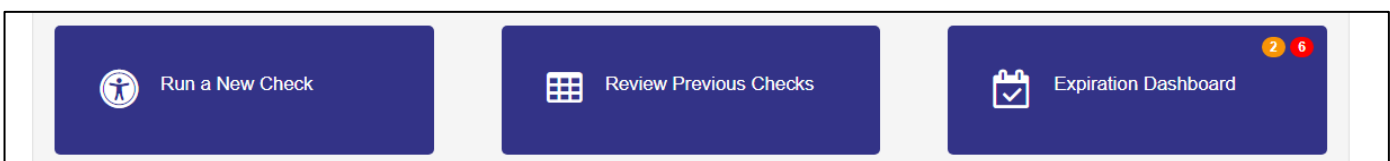

If the 30 Hours Free Childcare button has any **AMBER** or **RED** numbers, the Portal is notifying you that some children are coming to the end of their Eligibility and/or Grace period. This should be checked via the Expiration Dashboard.

This will open the 30 Hour Entitlement Portal where you will be presented with three options
- Run A new Check
- Review Previous Checks
- Expiration Dashboard

Note any **AMBER** or **RED** numbers on the 30 Hours Free Childcare button will be repeated on the

Expiration Dashboard button.

Run a new check

Use the **Run a new check** option when you need to check the validity of a 30 hour code for the first time.

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 many 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 Legal Forename *	Child's Legal Surname *	Child date of birth *	Parent National Insurance number *	Eligibility code *
for example John	for example Smith	for example 30/11/2012	for example NM123456C	for example 5000100501.

Existing Children

To run a 30 hours check for existing children (children previously added to your setting in a task), enter the child's legal forename and surname, as you do so the portal will return any matching records, showing the child's forename, surname, and date of birth.

You can confirm that the correct child has been returned by clicking on **View Details**.

If the correct child record has been returned, click on the record and the eligibility checking field will be auto filled with the child's details

Enter the parents NI number and the Eligibility Code in the relevant fields and click on **Run Check**

If the eligibility code is valid, you will receive a message as shown below.

Success !

This eligibility code is valid from 01-Jul-2017 to 31-Aug-2017, with a grace period to 31-Dec-2017.

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

The portal will automatically link the eligibility code to the child's record and the eligibility code and details of the eligibility & grace periods will be added to the child detail screen.

| 30 Hour Eligibility Code | ✏️ 500███████ | | ℹ️ This eligibility code is valid from 07-Aug-2021 to 11-May-2022, with a grace period to 31-Aug-2022 |

The date the code is eligible from is the date on which HMRC confirmed eligibility. This date must be before the start of the term in which 30 hours funding will be claimed for the first time. See the Bracknell Forest Website for further guidance on 30 hours eligibility codes https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/information-early-years-providers/funding-information-early-years-providers/about-free-places

If the eligibility check is unsuccessful, you will receive the message shown below

⚠️ 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.

New Children (Ad-hoc checks)

If you enter details for a new child (not an existing child) the portal will display the 'No Records Found' message. And you will need to run an 'Ad-hoc' check

Select **Add New Child**

A pop-up window will open asking you to confirm that you want to add a new child, select **OK**

Enter the child's Forename, Surname, Date of Birth, Parents NI Number and Eligibility Code in the

relevant field before selecting Run Check, you will receive the same messages as when you complete a check for an existing child.

The eligibility code will not be linked to a child's record. You will need to add the eligibility code when you add the child's record to your setting.
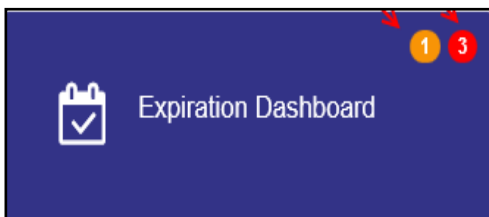
Expiration Dashboard

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.

Providers are alerted to check the Expiration Dashboard in two ways.

1. Coloured numbers on the 30 Hours Free Childcare button

2. And the Expiration Dashboard button

The number displayed in **RED** indicate those whose eligibility has already expired and are no in the Grace Period.

The number in **AMBER** is the number due to expire within the next **28 days**

> **Providers are encouraged to monitor the Expiration Dashboard regularly as it will provide valuable information about the eligibility of children in their setting for the 30 hours extended entitlement.**

Click on **Expiration Dashboard**

The Expiration Dashboard provides a quick reference of eligibility code expiry dates and grace period end dates

The colour of the **Eligible to date** changes colour based on the how soon the code will expire.
- **GREEN** indicates a eligible to date more than a month in the future
- **AMBER** indicates a code that will expire in the next month
- **RED** indicates a code that has expired

Child	Eligibility Code	Eligible From	Eligible To	Grace Period End	Eligibility was last checked on	Notes / Further Action Needed		
Aaron Long (16/09/2012)	12312345651	01/07/2017	31/07/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Simon Misselbrook (01/02/2014)	11221122112	01/07/2017	31/07/2017	31/12/2017	14/08/2017 Eligible Recheck now	🗋	✔	Update
Alan Petersen (17/09/2012)	99887766554	01/07/2017	31/07/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Craig Reed (04/12/2012)	51231231231	01/07/2017	31/07/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Roy Ross (02/12/2012)	22332233445	01/07/2017	31/07/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Donald Thompson (16/11/2012)	22334422334	01/07/2017	31/07/2017	31/12/2017	14/08/2017 Eligible Recheck now	🗋	✔	Update
Earl Cook (23/05/2013)	51232342344	01/07/2017	31/08/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Roy Ross (02/12/2012)	59879879811	01/07/2017	31/08/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update
Polly Misselbrook (01/01/2014)	12345678900	01/07/2017	31/10/2017	31/12/2017	24/08/2017 Eligible Recheck now	🗋	✔	Update

The colour of the **Eligible to date** is the same colour as the **EH** in the funding column of a task (see the section on Icons)

At the top of the expiration dashboard are 3 filters which allow providers to change the information displayed.

You can manually overwrite the number of days in this box to show the specific timescale you want to review.

You can filter your dashboard by code end dates, grace period end dates and to show codes that have already expired.

Parents are required to reconfirm their code every 3 months. HMRC will email them a reminder 4 weeks before their code expires.

The portal will automatically re-check codes when they reach their expiration date but providers can check the code before the expiration date by clicking on '**Recheck now.**'

Child	Earliest start date for 30 hours place ⇕	Eligibility code ⇕	Eligible from ⇕	Eligible to ⇕	Grace period end ⇕	Eligibility was last checked on ⇕	Notes (further action needed) ⇕		
▬▬▬▬▬▬	01/01/2022 Spring Term	▬▬▬▬	24/11/2021	18/02/2022	31/08/2022	20/03/2022 Eligible Recheck now	🗋	✔	Update
▬▬▬▬▬▬	01/01/2022 Spring Term	▬▬▬▬	21/12/2021	08/04/2022	31/08/2022	06/04/2022 Eligible Recheck now	🗋	✔	Update

Once a parent has reconfirmed their code the **'Eligible To'** and '**Grace Period End'** dates will update, and the red cell will turn green.

Where parents have not reconfirmed their eligibility and their 'Eligible to' dates remain amber or red providers should remind parents to reconfirm their details.

There may be a delay between parents reconfirming their eligibility on the HMRC website and when the 'Eligible to' date updates on the dashboard.

It is the provider's responsibility to talk to parents about attendance patterns and charging options where parents advise they are no longer eligible. Bracknell Forest Council is unable to provide extended entitlement funding for ineligible children.

If you know that a code does not need to be renewed e.g., the child will be starting school in the next term, you can stop the record from appearing.

Select **Update.**

Child	Earliest start date for 30 hours place ⇕	Eligibility code ⇕	Eligible from ⇕	Eligible to ⇕	Grace period end ⇕	Eligibility was last checked on ⇕	Notes (further action needed) ⇕	
▼ Child ⇕								
▬▬▬▬▬▬	01/01/2022 Spring Term	▬▬▬	24/11/2021	18/02/2022	31/08/2022	20/03/2022 Eligible Recheck now	⬜ ✔	Update
▬▬▬▬▬▬	01/01/2022 Spring Term	▬▬▬	21/12/2021	08/04/2022	31/08/2022	06/04/2022 Eligible Recheck now	⬜ ✔	Update

On the screen that opens, remove the tick in the '**Is any further action needed?**' box and the press **Save**. The record will not appear if you select 'Yes' in the '**Further Action Needed'** filter.

This page includes space for case notes to keep track of actions taken or reasons for removing the further action needed tick. These notes are not visible to other providers.

Notes (further action needed)   X

Is further action needed?   ☑

Case notes. This is not shared with other providers.

[Cancel]   [Save]

It is the parent's responsibility to reconfirm their eligibility code, providers cannot do this for them

Review Previous Checks

You can search for previous checks by Name, Date, National Insurance Number, Eligibility code or check the status of any checks you have previously completed.

| ⌂ Home | Headcount (MAH) ▾ | 30 Hours Childcare ▾ | Two Year Old Funding ▾ | | 👤 PPUSER ▾ | ⏻ Sign out |

Checks Run for Ages 2 to 5 Years 6 Months

Provider St Marks

Existing Child Checks

Child's Forename ⇕	Child's Surname ⇕	Child's Date of Birth ⇕	Parent's NI Number ⇕	Eligibility Code ⇕	Check Last Run ⇕	Eligible From ⇕	Eligible To ⇕	Grace Period End ⇕	Check Status ⇕
Polly	Misselbrook	01/01/2014	JT123456A	12345678900	24/08/2017	01/07/2017	31/08/2017	31/12/2017	Eligible
Earl	Cook	23/05/2013	JT121212A	51232342344	24/08/2017	01/07/2017	31/08/2017	31/12/2017	Eligible
Roy	Ross	02/12/2012	BA123456A	59879879811	24/08/2017	01/07/2017	31/08/2017	31/12/2017	Eligible
Craig	Reed	04/12/2012	AB654321A	51231231231	24/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible
Aaron	Long	16/09/2012	AB654321A	12312345651	24/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible
Roy	Ross	02/12/2012	LK123456A	22332233445	24/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible
Alan	Petersen	17/09/2012	AS123456D	99887766554	24/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible
Donald	Thompson	16/11/2012	TY123456A	22334422334	14/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible

Ad-hoc Checks

Child's Forename ⇕	Child's Surname ⇕	Child's Date of Birth ⇕	Parent's NI Number ⇕	Eligibility Code ⇕	Check Last Run ⇕	Eligible From ⇕	Eligible To ⇕	Grace Period End ⇕	Check Status ⇕
Simon	Misselbrook	01/02/2014	JY123456A	11221122112	14/08/2017	01/07/2017	31/07/2017	31/12/2017	Eligible

SECTION 5 - DAF APPLICATION

Disability Access Funding (DAF) Applications can be made through the Portal. You will need a copy of the completed and signed Parent Declaration Form and the DLA Award Letter before you start the DAF Application process. Electronic copies of both documents will facilitate a faster application process.
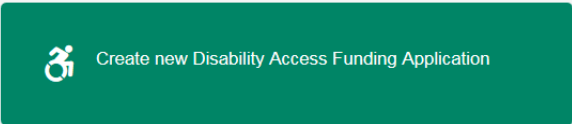
Select **Disability Access Fund** to go to the DAF Home Page

Any messages received in relation to a DAF Approval or Rejection will appear in the My Messages section

Select **Create new Disability Access Funding Application** to begin a DAF Application

If you are working across multiple settings you will need to select the setting that you want the DAF Applicant to be linked to, by selecting the relevant service from the drop-down menu.

Select **Continue** to display the list of children.

If you are working at a single setting, you will only see the list of children.

The portal will default to show you children who could be eligible for DAF funding only, children who are already approved or are not eligible by Age will not appear in the list of children.

You can change the list to children who are not eligible by unticking the box at the top of the list

Disability Access Funding Application
Select a child from the list to continue with the application

Find a Child		Show Eligible Children ☑

	Forename	Surname	Date of Birth	Age Eligibility	DAF Approved Date
○	Alan	Stevens	22/01/2013	Yes	16/10/2017
○	Arthur	Collins	09/02/2013	Yes	16/10/2017
○	Arthur	Robinson	08/09/2012	Yes	24/10/2017
○	Brandon	Stewart	01/09/2012	Yes	16/10/2017
○	Chris	Schmidt	05/04/2015	No	
○	Eugene	Armstrong	17/05/2014	Yes	19/10/2017
○	Grundy	Goobster	31/12/2013	Yes	
○	Jason	Sims	24/03/2015	No	

To start a DAF Application for a child, select the circle next to their name

○	Grundy	Goobster	31/12/2013	Yes	

Click **Select** to display the application page

Disability Access Funding Application
Provide DLA Award letter and Parental Agreement details to proceed with Disability Access Funding application

This is the guidance text for parental agreement, please update me

Parental Agreement [   ] Browse...

☐ I will provide Parental Agreement by post

This is the guidance text for award letter, please update me

DLA Award Letter [   ] Browse...

☐ I will provide DLA Award Letter by post

Details to support your Disability Access Funding claim

[   ]

Cancel	Back		Continue

To complete the DAF Application, you will need to submit copies of the child's Parent Declaration Form and DLA Award Letter. For each required document, select **Browse** to search for and upload the document to the Portal. Or you can select the notification that you will be sending the evidence by another method. Supporting details can be entered in the text box

Details to support your Disability Access Funding claim
Supporting Details:

The documents sent contain the ...

Selecting **Continue** will take you to a screen showing the details of the DAF application.

Check the Application

Disability Access Funding Application
Below is the summary of Disability Application Funding application

Child Details
Name	Alan Stevens
Gender	Male
Date of Birth	22/01/2013
Address	63, Stanley Plaza, Carbrookville, Jutown, Bedshire, B2 8CD
Ethnicity	WBRI - White British
First Language	

Application Details
Provider	Markness
Service Name	Markness - Daycare
Parental Agreement	golden-ticket.jpg
DLA Award Letter	Logo.jpg
Details to support your Disability Access Funding claim	Supporting Details: The documents sent contain the ...

☐ All the DAF details provided by me are correct

Cancel   Back   Submit

Confirm the details of the application are correct by ticking the box on the bottom of the page.

☑ **All the DAF details provided by me are correct**

Select **Submit** to send the Application to the Early Years Team. You will receive confirmation the application has been submitted and a reference number.

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

Application reference number for your information:

DAF-1710-X2OKFEF3

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

Finish

Select **Finish** to complete the application process

Remember to securley mail or deliver documents that have not been submitted

electronically. The relevant address is:
Bracknell Forest Council
Early Years 2nd Floor North
Time Square
Market Street
Bracknell
RG12 1JD

Select **Create new Disability Access Funding Application** to go back to the DAF Application list to send information for another applicant

Any children who you have already applied for will show a Pending Application message

○	Arthur	Robinson	08/09/2012	Yes	24/10/2017
○	Brandon	Stewart	01/09/2012	Yes	16/10/2017
○	Chris	Schmidt	05/04/2015	No	
○	Eugene	Armstrong	17/05/2014	Yes	19/10/2017
○	Grundy	Goobster	31/12/2013	Yes	
○	Jason	Sims	24/03/2015	No	
○	Kevin	Simpson	03/05/2014	Yes	
○	Russell	Armstrong	05/09/2012	Yes	
○	Scooby	Goobster	31/12/2013	Yes	
○	Shawn	Arnold	30/01/2013	Yes	Note: This child has a pending application
○	Stephanie	Arnold	02/06/2014	Yes	
○	Steven	Arnold	30/03/2015	No	

You will receive a message once the Application has been Approved or Rejected

SECTION 6 - TWO-YEAR-OLD FUNDING

Parent/Carers can apply for 2-year-old funding online using the Citizen Portal. They will need an email address, their National Insurance Number and the child's date of birth to check complete a 2-year-old funding eligibility check. Guidance on completing the online eligibility check and a link to the Citizen Portal is available on the Bracknell Forest Council Website https://www.bracknell-forest.gov.uk/children-and-family-services/childcare/free-places-2-year-olds

To access the 2-year-old section of the Provider Portal, select the **2-year-old funding** button on the home page or use the drop-down list under Two-Year-Old Funding at the top of the page and select **Provider Home.**
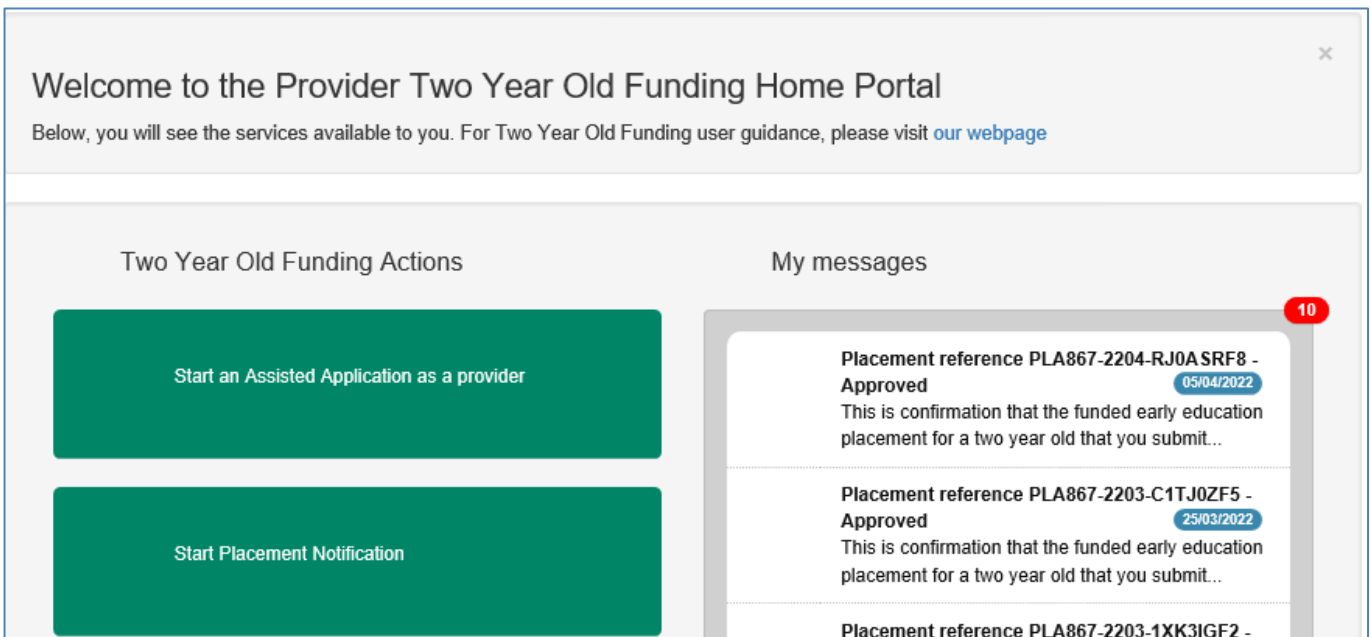
Messages relevant to Two-year-old funding applications and placements are on the right of the Home Page, with action buttons on the left.

Assisted Applications

A provider can assist a parent/carer check eligibility for two-year-old funding by completing an assisted application. To start the eligibility check, select **Start an Assisted Application as a provider**.

Enter the child's date of birth and postcode and select **Continue.** Note that you will not be able to amend the date of birth or post code later in the process. If you need to change the date of birth or postcode you will need to start a new application.

Enter the child's legal Forename, Surname, Gender, Ethnicity and First Language, then select **Find Address**

The Portal will lookup addresses for the provided postcode. Highlight the correct address and click on **Select** to continue.

If the address is not displayed, select **Enter Address Manually** and manually populate the address. Please check that the postcode used is correct before using this option.

You can check the postcode for an address on the Post Office website

https://www.royalmail.com/find-a-postcode

Select **Continue** to save the child's details and move to the next screen.

Enter the Parent/Carer details and either choose the existing address or select No to enter a new address. The select **Continue** to store the Parent/Carer details.

Note that the Applicant is the child's parent/carer, not the childcare provider

Claim Type

The Parent/Carer may be claiming two-year-old funding due to **Economic** (e.g., benefits) or **Non-Economic** grounds (e.g., disability, child in care, adoption)

Economic Grounds

Selecting **Claim on economic grounds** will show you the Parent/Carer details to populate their date of birth and either their National Insurance Number or National Asylum Seekers Number. Then select **Continue**

You must carefully read and agree to the Legal Declaration by ticking the box next to **I agree**.

Then select **Confirm** which will submit the application to the Eligibility Checking System and once the check has completed the Portal will return a result for the eligibility check.

Once the result has been returned you can choose how to deliver the result to the Parent/Carer, depending on their preference.

If **By Mail** or **Via Citizen Portal Account** are selected, you will need to enter an email address.

> **Before selecting Via Citizen Portal Account, ensure the Parent/Carer has a Citizen Portal account associated with the email address.**

The confirmation notification includes an eligibility reference number, eligibility date and contact information for the Councils Early Years team.

Dear Miss Whindy Pickles

This is confirmation that your child, Roberto, qualifies for funding for early education. You can claim up to 15 hours per week of free nursery education with an approved provider. The provider will claim the funding directly from this Authority after the child's attendance.

Please note that the earliest date from which your child can take up a funded place is **17/11/2016**.

When arranging a funded place with an approved nursery provider, you will need to quote this reference number TYF-1611-FOC1X2F7. It would be helpful if you could show the provider your child's birth certificate and proof of residence at the address you provided at this time.

Please retain this message for future reference and quote reference number TYF-1611-FOC1X2F7 in all correspondence.

If you have any questions regarding your application, please contact us on 01011 123456 or email contact@thisauthority.com

Regards

TYOF Team, This LA

Visit our website

Print

Select **Finish** on the application page to complete the application.

Non-Economic Grounds

Selecting **Claim on non-economic grounds** will show you the options for the Non-Economic claim

Selecting the relevant section will expand it to allow you to populate the details of the claim, and any electronic evidence documents can be attached by selecting **+Add File** and browsing to the file.

Multiple files can be attached as evidence

Read and agree to the declaration by ticking the box. Then select **Continue**

The parent/applicant has been made aware of these conditions and has confirmed that they are true

Back   Continue

Select the method(s) of contact and enter any supplementary details before selecting **Continue**

Preferred methods of contact

How would the applicant like to be contacted once we have reviewed their application.

Via Email   Yes

Via Post   Yes

Via Citizen Portal   Yes   (only valid where the applicant has already created an account on Citizens Portal)

Via Provider   Yes

A message will always be sent to you via your Provider Portal account when changes are made to this application.

You may add some information below to record a phone number or address at which to contact the applicant when you receive any notifications from the authority.

Bob at Markness Nursery - 07865432123

Back   Continue

Before selecting Via Citizen Portal Account, ensure the Parent/Carer has a Citizen Portal account associated with the email address.

Populate the contact details for the Parent/Carer and select **Continue**

Applicants contact details

Please supply some information so that we can contact the applicant regarding any questions or updates relating to their application.

Telephone number *	07865432314
Email address *	w.pickles@email.co.uk
House Number *	34
House Name	
Street Name	Theramin Close
District / Village	
Town	Drokington
County	Bedfordshire
Postcode *	MK43 0NE

Back   Continue

Note the application reference for your records and then select **Finish** to return to the Home Page

Application submitted

Your application for Roberta Pickles has been submitted. The applicant will be notified of the result via whichever method of contact which they selected. You will also be notified of the result of your claim by a message to your provider portal account.

Application reference number for your information:

TYF-1503-AHMJF6F6

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

Finish

Placement

On the Two Year old Funding Home Page you can apply for the child to be placed at your setting by selecting **Start Placement Notification**

Enter the Application Reference Number and Child details and the date the placement will start then Select **Continue**

Placement Notification

You can notify the Local Authority of funded placements for 2 year old children using this facility.

This placement must relate to a child who is two years old at the start of the funding period in which the proposed placement commences, you will need to provide some details about the child and the Funded Early Education for Two Year Olds application reference number; these details will be validated against those entered when eligibility for early education for two year funding was assessed.

You may find it appropriate to see the child's birth certificate and proof of residence at this stage, although this is not strictly necessary until you submit a request for funding

Application Reference *	TYF-1503-LO4AIRF9
Date of Birth *	31/12/2012
Start of placement *	02-March-2015
Surname *	Pickeles
Forename	Roberto

Cancel   Continue

Check that the application details are correct and then tick the box in the Declaration to confirm that you have read and complied with the Declaration notice before selecting **Agree And Continue**

Application Summary

Below are the details given by the applicant when they made their application for Funded Early Education for Two Year Olds, please use this information to confirm that the user made this application before proceeding. If the applicant has since moved address then you will get the opportunity to amend their address on the next page.

Application's Details

Application Reference	TYF-1503-LO4AIRF9
Eligibility Date	02/03/2015

Child's Details

Forename	Roberto
Surname	Pickeles
Child's Dob	31/12/2012
Postcode	MK43 0NE

Applicant's Details

Forename	William
Surname	Pickles

Declaration

☑ I am satisfied that the proposed funded placement relates to the child for whom this application was approved

Disagree And Exit   Agree And Continue

Either confirm the Address is correct or select **No, it is wrong** which will open new fields to enable you to populate the relevant address.

Where relevant, select the Provider from the dropdown and the Service that the Child will be attending and then select **Continue**

Read the Declaration carefully before ticking the box to confirm that you agree with the declaration, then select **Continue.**

Placement Declaration

Chlid Details ⌄

Name	Roberto Pickeles
Gender	Male
Date of Birth	31/12/2012
Address	34 Church Walk, BEDFORD, Simshire, MK43 0NE

Placement Details ⌄

| Service | Markness - FDC |
| Placement Date | 02/03/2015 |

Declaration

☑ I understand that I must confirm the full name, date of birth and home address of the child before I claim any funded hours. I also understand funding for the placement will only be available from the child's date of eligibility

Quit   Continue

You will now see the details of the Placement request.

Select **Finish** to complete the Placement application.

A confirmation message will be received when the Council has approved the placement application. This message will be available in the messages section of the Two Year old Funding Home Page.

SECTION 7 – SELF UPDATE PORTAL

The Self Update Portal allows you to enter details about your setting, which will be used to:
- complete your early years census returns
- inform the Childcare Sufficiency Assessment

The Self Update Portal is permanently open. The Early Years census section of the Self Update Portal will only be available in the spring term. Early Years Census specific guidance will be issued to all providers

As per the terms of the Provider Agreement, you are expected to update the self-update portal once a term. Providers are encouraged to update their details as soon as anything changes. This will make completing the annual early years census and sufficiency assessment easier.

Self-Update Home Page

On the Provider Portal Home screen, click on the **Self Update** Button. which will take you to the Self Update Home Page. Here you will see two options:
- My Messages - All Self Update related messages will be shown in My Messages.
- Actions – Selecting the Self Update button under Actions will take you to the Self Update Landing Page to start updating records
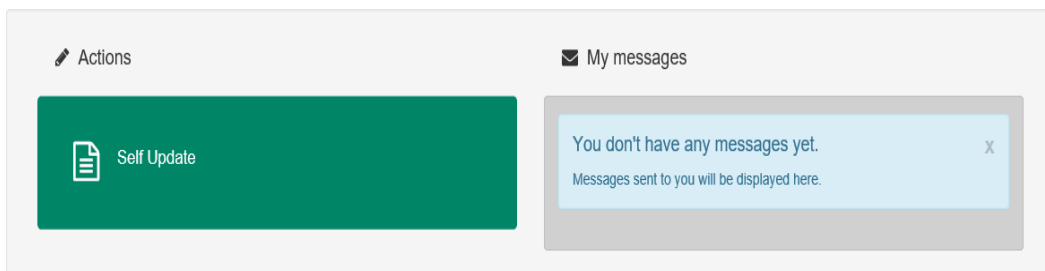
Self Update Portal related messages are saved under My messages until you delete them. Icons indicate which messages have not been read, have attachments etc. The number in the red field on the top right shows the number of unread messages. You can access all messages by selecting 'View all messages'
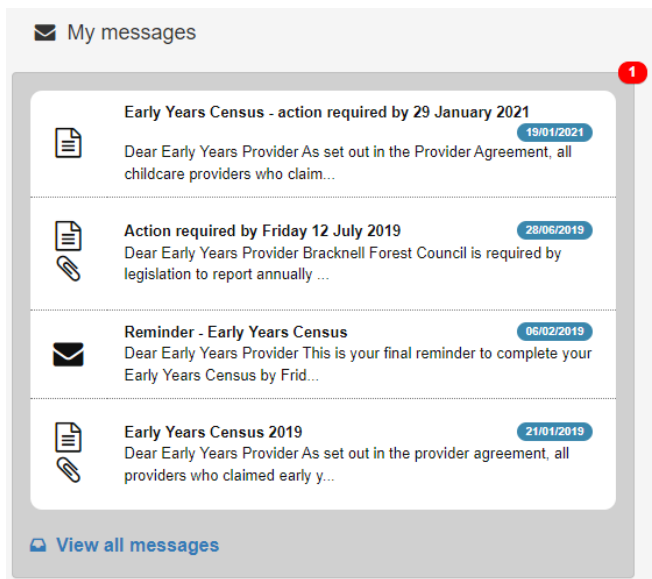
Updating Service Details

Click on the **Self Update** button to go to the Self Update Landing Page.

Click on your Provider Name

Most providers will only see one Provider Name, however if your account is linked to multiple providers you will see a list of all providers your account is linked to.

You will now see the service(s) at your Provider, select the Service you would like to update by clicking on the Service name.

You will only have multiple services linked to your Provider if you have multiple services registered for that Provider

This will open the **Service Details** page which is the starting point for many of the task you need to complete in the Self Update Portal

The **AMBER** Pending changes indicator on the **Service Details** page indicates that you have submitted a change which has not yet been approved by the Council.

As a condition of receiving the Free Entitlements you are required to keep all 3 sub-tab's of the Basic Service Details page up to date and review them at least once per term.

Self Update / Anytown TEST Pre-school / Anytown TEST Pre-school

| Service Details | Availability and Capacity ● | Costs | Additional Information |

Guidance Notes

Below you find details of your service. It is your responsibility to keep this information up to date.
Please remember to press the **Submit** button to save changes

Field	Value
Service Name *	Anytown TEST Pre-school
Service Type *	Pre-School Play Group ⌄
Start Date *	01/01/2010
End Date	
Registered for Free Entitlement Funding	✓
Email Address	
Web Site	
Telephone Number	
Fax Number	
Address	Market Street, Bracknell, RG12 1JD [Select]
Ofsted Provision Type	
Offers Extended Childcare (Subject to Updated Provider Agreement)	✓
Extended offer ceases from	⌄
Details of your 30 hours offer	
Other Information	
Comments for Local Authority relating to this submission only	

[Back] [Submit]

Please ensure the following fields are correct and up to date

- Service Name
- Select a Service Type.

Please contact the Early Years Team if you need advice on the correct service to use

Contact information:

- Email Address
- Web Site address
- Telephone Number
- Fax Number

To add or change the address for your setting, Click **Select.**

Enter the Postcode and click the **Find Address** button to list matching addresses
- Select the required address

If the required address is not listed:
- Click **Enter Address Manually** to display the blank address fields
- Enter the address
- Click the **Save** button

If you offer the 30 hours extended entitlement the **Offers Extended Childcare** check box should be ticked. If you do not think this box is correct (ticked or unticked) please contact the Early Years Team.

Enter **Other Information and Comments** for Local Authority if applicable.

Click the **Submit** button on the bottom right of the page to submit your changes to the Council

The **Clear** button, on the bottom left, will clear any pending changes.

The **Back** button will take you back to the Self-Update Landing page

Fields that you have changed are highlighted, and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed.

Updating Availability and Capacity details

From the **Service Details** page, select the **Availability and Capacity tab**, which will open a new set of tabs.

- **Complete**: Opening Dates, Availability & Capacity Details tabs
- **Ignore:** Age Range & Vacancies tabs – these are not needed

Opening Dates

If there is no start date for your service, you must complete the **Opening dates** tab.

To update previously entered **Opening Dates** or **Opening Times** skip to **Updating an Existing Opening Date**

Entering an Opening Date

Click the **Add Opening Date** button to display the **Opening Dates** tab.

Enter a Description. e.g., breakfast club, after school club, full day-care. We suggest you avoid time bound descriptions such as Autumn term**.**

Enter a Start Date.

If required, enter an End Date. (We suggest you leave this field blank for now)

If required, enter Comments for Local Authority.

Click the **Submit** button.

Opening Times

After entering an **opening date,** enter the relevant **opening times** for the opening date:

Select the **Opening Times** tab.

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

Select a day of the week from the drop-down list:

Enter a start time and an end time (note the required format HH:MM in 24-hour format)

Do not complete the Capacity or Vacancy fields – this information is collected on another page

Click the **Submit** button.

Click the **Back** button to return to the **Opening Times** tab.

Click the **Add Opening Time** button to repeat the process for the next day of the week.

If you don't click the Back button before starting another day you will over-write the previous day, only the last day entered will be saved

Updating an Existing Opening Date

On the **Service Details** page select the **Availability and Capacity** tab.

Select the description that you want to update to display the **Opening Dates** tab.

Make changes to the description, start and end dates as required

Press **Submit**

If required, select the **Opening Times** tab.

Make changes to the current information.

Click the **Submit** button.

Opening Times Exceptions

The '**Opening Times Exceptions'** tab is not needed and can be ignored.

Availability

On the **Service Details** page select the **Availability and Capacity** tab.

Select the **Availability** tab.

Enter the number of weeks your setting is open per year.

- Do not include closures for bank holidays, inset days or other planned closures

Under '**When service is available**' select all entries from the drop-down list that apply.

Click the **Submit** button.

Age Range

The **'Age Range'** tab is not needed and can be ignored

Capacity Details

Providers should update their capacity details each term after they have submitted their Actual Task.

On the **Service Details** page select the **Availability and Capacity** tab

Select the **Capacity Details** tab

Enter the current date in the **Capacity Date** field.

To Update an Age Range
If you have previously entered your capacity details and the age ranges are still correct:
- Update the **Waiting List, Vacancies and Capacity** details for the age range
- Add any comments for the Local Authority

To add a new or additional Age Range
Click the **Add Age Range** button.
- Select an Age Range from the drop-down
- Enter the **Waiting List, Vacancies and Capacity** details for the new age range
- Add any comments for the Local Authority

To change an Age Range
Select the **Age Range** to be updated**.**
- Update the age range from the drop down.
- For the relevant Age Range, select the correct Age Range from the drop-down
- Enter the **Waiting List, Vacancies and Capacity** details for the updated age range
- Add any comments for the Local Authority

After entering all relevant age groups, click the **Submit** button.

Do not duplicate age groups. The system will not allow duplicate age groups and the Council will have to remove duplicates before any changes can be accepted
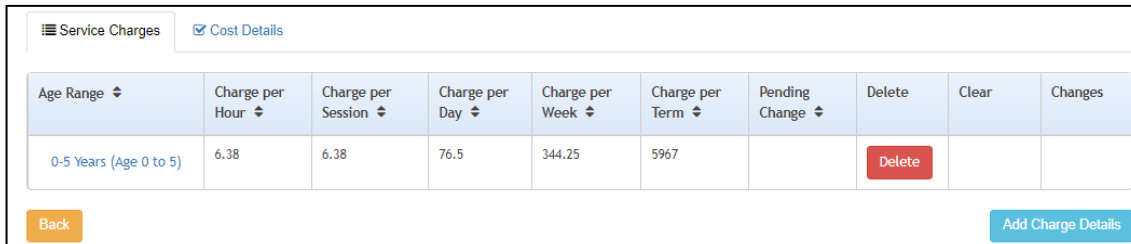
Vacancies

The **'Vacancies'** tab is not needed and can be ignored

Updating Costs

The Council will not share cost data with other providers or parents. It will be used to calculate average prices for childcare in Bracknell Forest as part of the Councils childcare sufficiency duty.

On the **Basic Service Details** page Select the **Costs** tab to display the Service Charges sub-tab.

Age Range ⇕	Charge per Hour ⇕	Charge per Session ⇕	Charge per Day ⇕	Charge per Week ⇕	Charge per Term ⇕	Pending Change ⇕	Delete	Clear	Changes
0-5 Years (Age 0 to 5)	6.38	6.38	76.5	344.25	5967		Delete		

Back   Add Charge Details

Service Charges

Click the **Add Charge Details** button.

Select an Age Range from the drop-down.

Enter the hourly charge for the age group, guidance notes are provided at the top of the Add Charge Details page, these are:
- Include all age groups that you charge for
- Do not include the free entitlement
- If you have different prices for the same age group, for example a discount for attending full time, please enter the most typical cost.
- Do not include any sibling discounts
- If you charge per session/day/week/term, convert the charge to an hourly rate

Add any comments for the Local Authority if required.

Click the **Submit** button.

If you charge different rates for different age groups, repeat the process until you have provided details of your fees for all age groups in your setting.

Cost Details

The **'Cost Details'** tab is not needed and can be ignored.

Clearing changes

Any change not yet approved by the Council can be cleared, reverting back to the information currently held by the Council.

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

Clearing All Related Changes

You can clear all pending changes for a service.

From the **Self Update Landing** Page, select the Provider to take you to the **Services** screen.

Any service with pending changes will have the **Pending changes** icon in the Change Column and the **Clear All button** will be available in the **Action** column.

Click the **Clear All** button to clear all pending change for the service.

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