

Provider Portal Guidance for Providers

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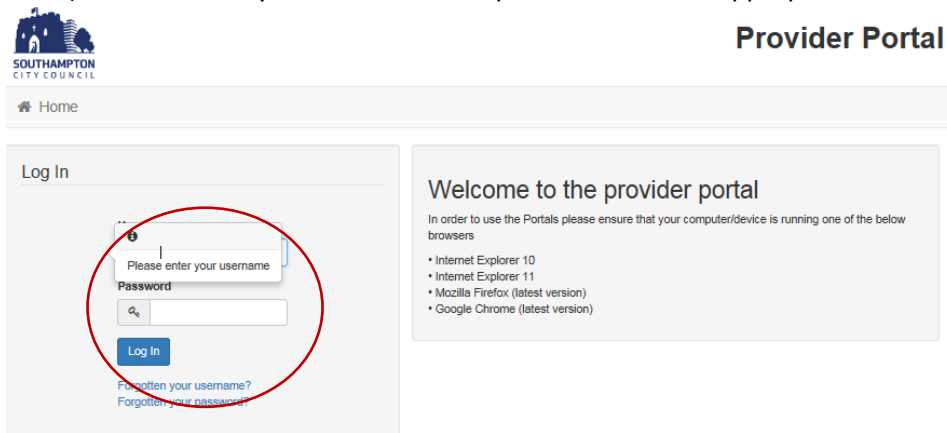
Logging in to the Portal

You will need to read and sign a Security declaration before being given access to the portal. Once you have signed this you will be given individual user IDs which must not be shared between staff at your setting.

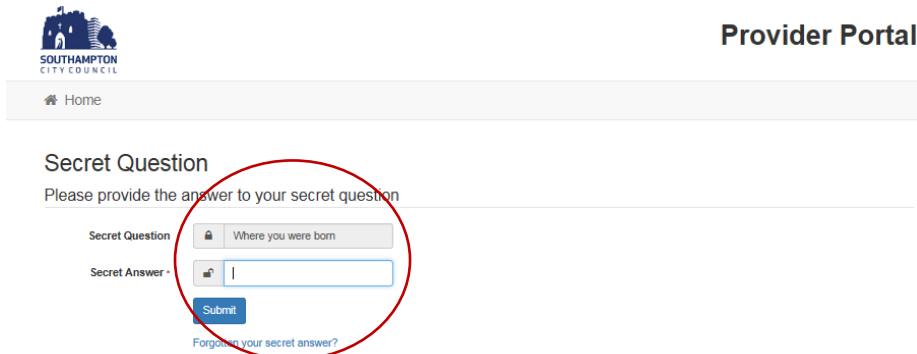
- 1) To Log in to the portal click on the following link:

https://ems.southampton.gov.uk/ProviderPortal_LIVE/Account/Account/Login

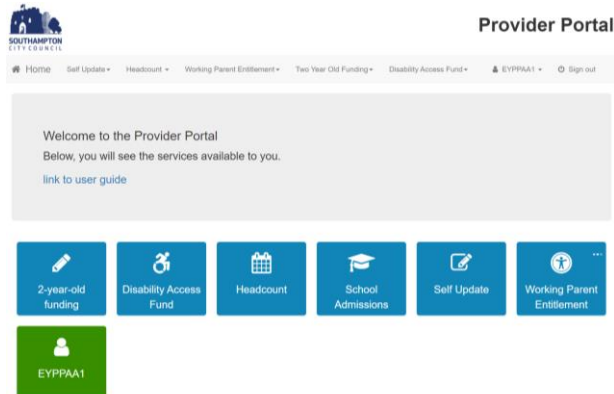
- 2) Enter the user details you have been given by the EY Funding team in the appropriate boxes (see number 5 below).
- 3) You will then be sent an email from FIS (Family Information Service). Click the link in the email which will then register you as a user. The link will take you back to the login screen.
- 4) Enter your user details again. You will need to update your password following the password guidelines and choose a security question.
- 5) Please enter your username and password into the appropriate boxes.



- 6) Enter your security question.



- 7) When you see the screen below you have successfully logged in

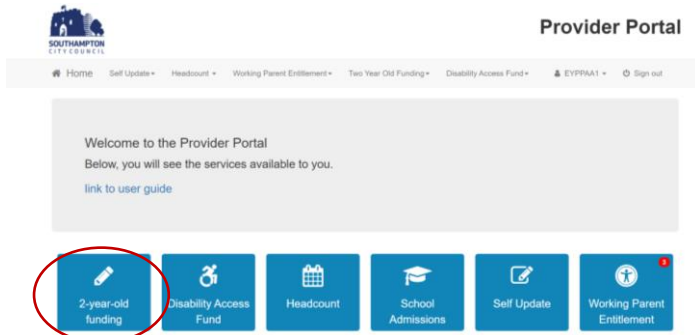


2YR OLD CHECK – for Disadvantaged Children

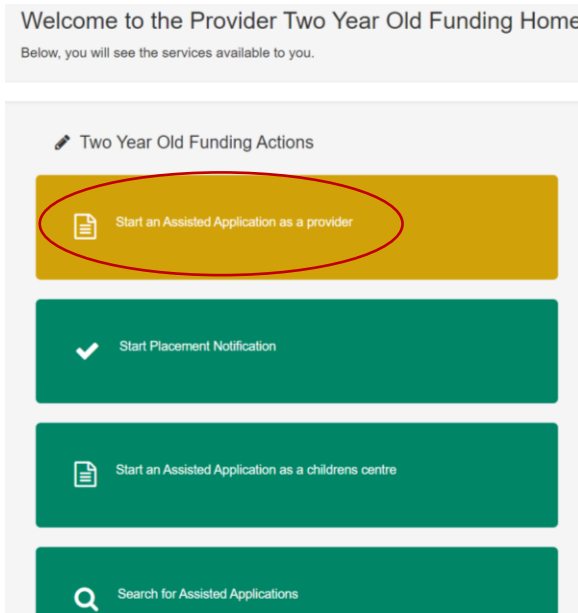
You will need to complete this for all new 2 year applications . You do not need to do this for children already claiming 2 year funding.

Completing an Application with a parent

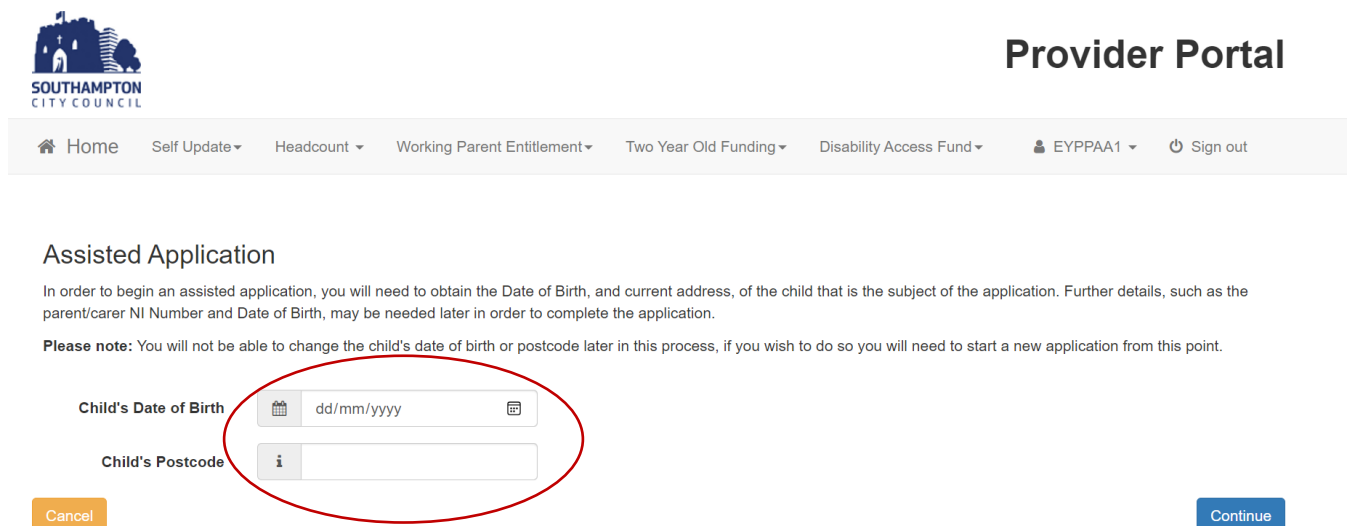
- 1) Login to the Provider Portal
- 2) Click on the Two year old funding button



- 3) Click on start an assisted application as a provider



- 4) Enter the Child's DOB and Postcode and then click continue



The screenshot shows the 'Assisted Application' form in the Provider Portal. The form is titled 'Assisted Application' and includes the following text: 'In order to begin an assisted application, you will need to obtain the Date of Birth, and current address, of the child that is the subject of the application. Further details, such as the parent/carer NI Number and Date of Birth, may be needed later in order to complete the application.' A 'Please note' section states: 'Please note: You will not be able to change the child's date of birth or postcode later in this process, if you wish to do so you will need to start a new application from this point.' The form contains two input fields: 'Child's Date of Birth' (with a calendar icon and a placeholder 'dd/mm/yyyy') and 'Child's Postcode' (with an information icon). Both fields are circled in red. At the bottom of the form, there are two buttons: 'Cancel' and 'Continue'.

- 5) Add the rest of the child's Forename, Surname, Gender, Ethnicity and Language.
- 6) Click on Find Address

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Add Child

To progress this application, enter the details of the child below

Please note: You cannot change the child's date of birth or postcode from those which you entered on the previous screen. If you have made a mistake then please restart the application.

Legal Forename *

Legal Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy)

Ethnicity *

First Language *

Postcode *

Find Address I don't have a Postcode

* Required field

Cancel Continue

- 7) Click on the correct address from the drop down list which will turn it blue and then click on the select button

Find Address Enter Address Manually

Civic Centre, Southampton City Council, Civic Centre Road, Southampton, SO14 7LY
 Lower Ground Floor East Wing, Civic Centre Municipal Block, Civic Centre Road, Southampton, SO14 7LY
 Lower Ground Floor West Wing, Civic Centre Municipal Block, Civic Centre Road, Southampton, SO14 7LY
 City Arts Conservation Studio, Civic Centre North Block, Commercial Road, Southampton, SO14 7LY

Select

* Required field

Cancel Continue

- 8) You will then see the full address – please **do not** make any changes to this and then click continue

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Add Child

To progress this application, enter the details of the child below

Please note: You cannot change the child's date of birth or postcode from those which you entered on the previous screen. If you have made a mistake then please restart the application.

Legal Forename *

Legal Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy)

Ethnicity *

First Language *

Use Another Address

House Number *

House Name

Building name

Street Name

District / Village

Town

County

Postcode *

* Required field

Cancel **Continue**

9) Enter the parent/carer details and click continue

SOUTHAMPTON CITY COUNCIL **Provider Portal**

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Enter applicant/parent/carer Information

To progress this application, enter the details of the applicant/Parent/Carer below:

Title

Legal Forename

Legal Surname

Gender Male Female

Relationship

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

Address Does the applicant live at the same address as the child ?
 Yes Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY
 No

[Back](#) [Continue](#)

There are two types of Disadvantaged 2yr Applications – the majority are a claim on Economic Grounds – it is always worth trying this first. The second is for non-economic claims and the criteria for these can be found on page 7.

Making an Economic Claim

- 1) Click on “Claim on economic grounds

SOUTHAMPTON CITY COUNCIL **Provider Portal**

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Claim type

Here you can apply to receive funding for your two year old.

Economic Claim

Here you can make an application for the applicant based on economic grounds. Most applicants will want this option.

[Claim on economic grounds](#)

Non-economic Claim

Here you can apply for Two Year Old Funding through non-economic grounds. Applicants for looked after or SEN children should choose this route.

[Claim on non-economic grounds](#)

[Back](#)

- 2) Fill out the rest of the parent/carer details – making sure you check all details are correct including the child’s details and the click continue.

SOUTHAMPTON CITY COUNCIL **Provider Portal**

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Enter applicants economic Information

To validate that the applicant is eligible, enter their economic details of the applicant below:

Legal Forename

Legal Surname

Date of Birth

Please enter either:

National Insurance No.
(e.g. AB123456C)

Or

National Asylum Seekers No. / /
(e.g. 13 / 07 / 56789)

[Back](#)

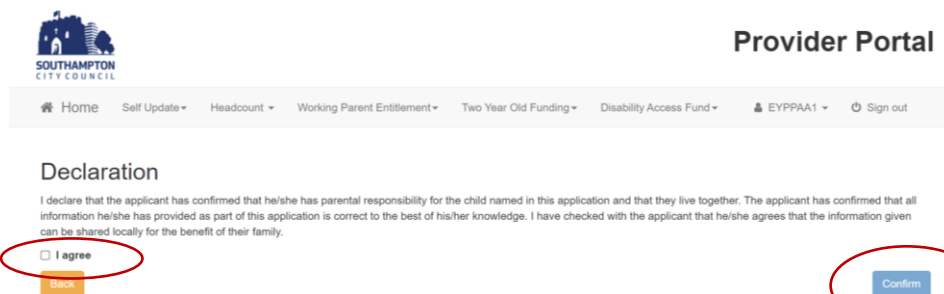
Child Details

Nikki Payne

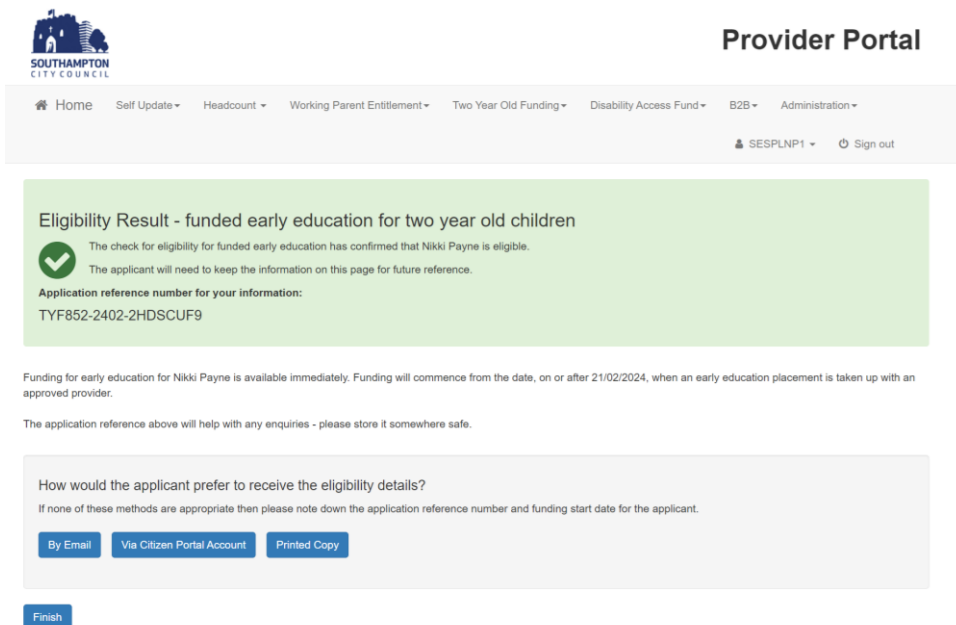
Gender	Male
Date of Birth	25-Dec-2021
Parental Responsibility	Yes
Relationship	Mother

[Continue](#)

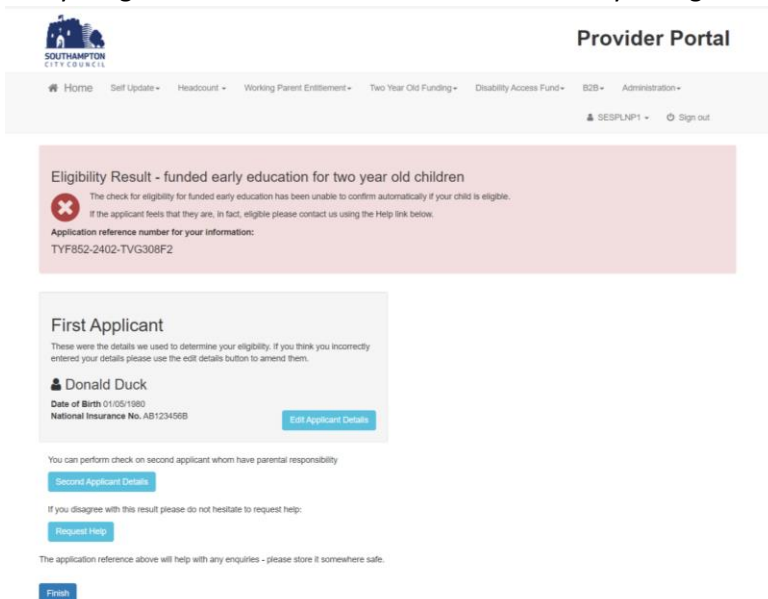
- 3) Read the declaration and tick the “I agree” box if you agree with the statement and then click confirm.



- 4) If the child is eligible then you will see a green tick and will be given a code and will have a date when the child is eligible. You can print a copy for the parent to keep hold of by clicking print copy. Once you have made a note of the number click finish.



- 5) If the child is not eligible you will see a red cross in a red box – please note the reference number they have been given is NOT A 2YR CODE. Firstly click on the edit applicant details button and check everything submitted is correct. If it is not make any changes and resubmit.



- 6) If you are still getting an ineligible result and you are sure the parent is eligible please complete a non-economic claim.

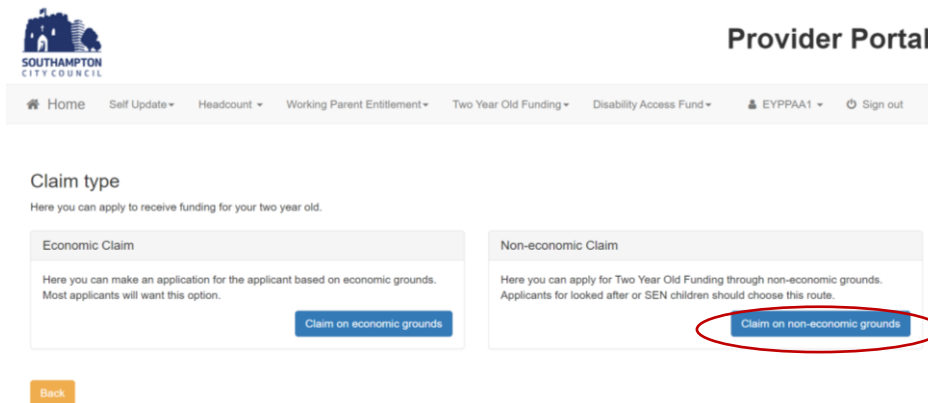
Making a non-economic Claim

You can make a non-economic claim for the following reasons:

- a) If the child is looked after
- b) If the child is adopted
- c) If the child has a current Education, Health & Care Plan
- d) The child has a disability
- e) You have completed an economic claim but the result has come back as ineligible but you have evidence that the parent is eligible e.g. a copy of the relevant benefits. This would be a manual check.

If the child meets any of the above criteria then please continue:

- 1) Please complete steps 1 to 9 of the “completing an application with a parent” (see page 3) when you get to the claim type screen click on Claim on non-economic grounds.



SOUTHAMPTON CITY COUNCIL **Provider Portal**

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Claim type

Here you can apply to receive funding for your two year old.

Economic Claim

Here you can make an application for the applicant based on economic grounds. Most applicants will want this option.

[Claim on economic grounds](#)

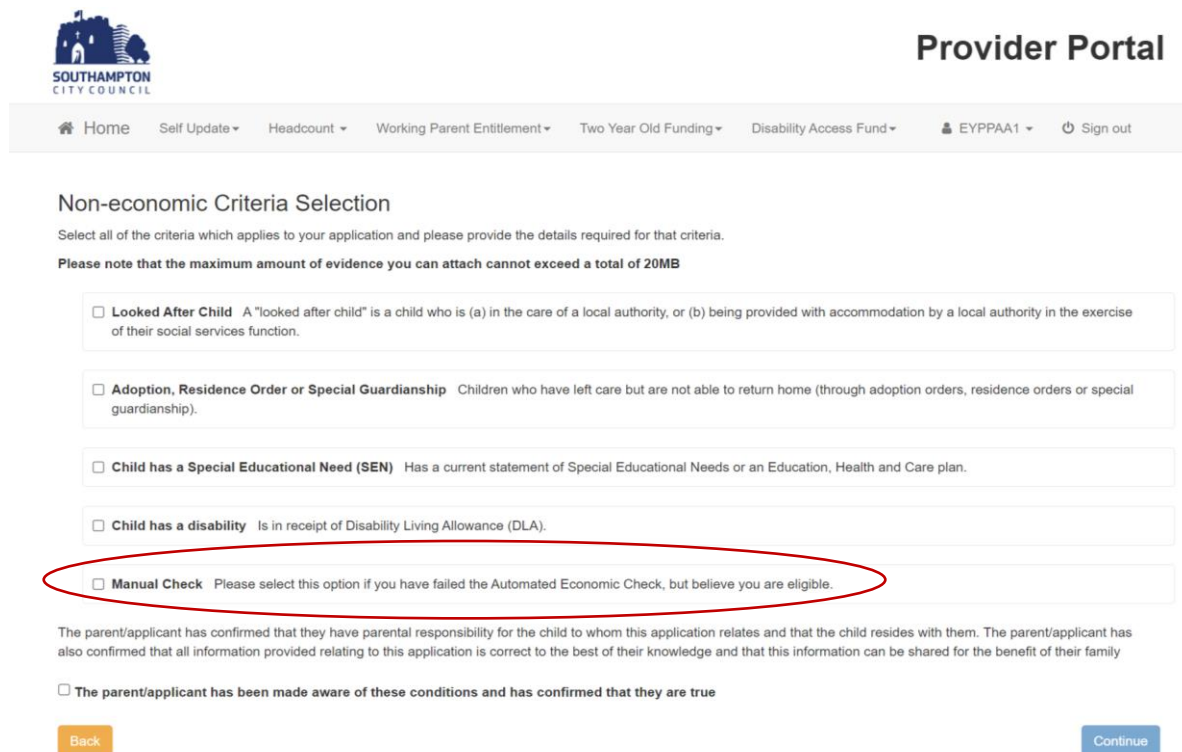
Non-economic Claim

Here you can apply for Two Year Old Funding through non-economic grounds. Applicants for looked after or SEN children should choose this route.

[Claim on non-economic grounds](#)

[Back](#)

- 2) Tick the box next to the criteria the child meets – in this instance I will complete a manual check. When you click a box will appear underneath. In this box state the reason why the parent meets the criteria – add in any information that supports their case.



SOUTHAMPTON CITY COUNCIL **Provider Portal**

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Non-economic Criteria Selection

Select all of the criteria which applies to your application and please provide the details required for that criteria.

Please note that the maximum amount of evidence you can attach cannot exceed a total of 20MB

- Looked After Child** A "looked after child" is a child who is (a) in the care of a local authority, or (b) being provided with accommodation by a local authority in the exercise of their social services function.
- Adoption, Residence Order or Special Guardianship** Children who have left care but are not able to return home (through adoption orders, residence orders or special guardianship).
- Child has a Special Educational Need (SEN)** Has a current statement of Special Educational Needs or an Education, Health and Care plan.
- Child has a disability** Is in receipt of Disability Living Allowance (DLA).
- Manual Check** Please select this option if you have failed the Automated Economic Check, but believe you are eligible.

The parent/applicant has confirmed that they have parental responsibility for the child to whom this application relates and that the child resides with them. The parent/applicant has also confirmed that all information provided relating to this application is correct to the best of their knowledge and that this information can be shared for the benefit of their family

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

[Back](#) [Continue](#)

- 3) Attach any documents that support the application by clicking the add file button and finding the document. This could include a copy of their relevant benefits, A copy of their disability living allowance if you are claiming under disability etc.

Non-economic Criteria Selection

Select all of the criteria which applies to your application and please provide the details required for that criteria.

Please note that the maximum amount of evidence you can attach cannot exceed a total of 20MB

- Looked After Child** A "looked after child" is a child who is (a) in the care of a local authority, or (b) being provided with accommodation by a local authority in the exercise of their social services function.
- Adoption, Residence Order or Special Guardianship** Children who have left care but are not able to return home (through adoption orders, residence orders or special guardianship).
- Child has a Special Educational Need (SEN)** Has a current statement of Special Educational Needs or an Education, Health and Care plan.
- Child has a disability** Is in receipt of Disability Living Allowance (DLA).

Manual Check Please select this option if you have failed the Automated Economic Check, but believe you are eligible.

Please provide details to support your claim relating to the above criteria

Please attach any additional evidence relating to the above criteria

The parent/applicant has confirmed that they have parental responsibility for the child to whom this application relates and that the child resides with them. The parent/applicant has also confirmed that all information provided relating to this application is correct to the best of their knowledge and that this information can be shared for the benefit of their family

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

- 4) Click the browse button – find the file you want to attach click open and then the file will be sent to us.

Please attach any additional evidence relating to the above criteria

The parent/applicant has confirmed that they have parental responsibility for the child to whom this application relate

- 5) Then tick the box stating the parent understands the conditions and has confirmed they are correct. Then click continue.

Please note that the maximum amount of evidence you can attach cannot exceed a total of 20MB

- Looked After Child** A "looked after child" is a child who is (a) in the care of a local authority, or (b) being provided with accommodation by a local authority in the exercise of their social services function.
- Adoption, Residence Order or Special Guardianship** Children who have left care but are not able to return home (through adoption orders, residence orders or special guardianship).
- Child has a Special Educational Need (SEN)** Has a current statement of Special Educational Needs or an Education, Health and Care plan.
- Child has a disability** Is in receipt of Disability Living Allowance (DLA).

Manual Check Please select this option if you have failed the Automated Economic Check, but believe you are eligible.

Please provide details to support your claim relating to the above criteria

proof of current qualifying benefit

Please attach any additional evidence relating to the above criteria

Proof of Benefit.docx

No file chosen

The parent/applicant has confirmed that they have parental responsibility for the child to whom this application relates and that the child resides with them. The parent/applicant has also confirmed that all information provided relating to this application is correct to the best of their knowledge and that this information can be shared for the benefit of their family

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

- 6) Add your name and phone number in the following box just in case we need to clarify anything and any other contact details that you may think are useful – then click continue.

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund B2B Administration

SESPLN1 Sign out

Preferred methods of contact

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

Via Email No

Via Post No

Via Citizen Portal No (only valid where the applicant has already created an account on Citizens Portal)

Via Provider No

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.

Back Continue

- 7) Add the parent's phone number in the following box.

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund B2B Administration

SESPLN1 Sign out

Applicants contact details

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

Telephone number The applicants telephone number

Back Continue

- 8) You will then be given a reference number – THIS IS NOT A VALID TWO YEAR CODE until we have validated it for you. Click Finish. We will then check the information submitted and after we have validated the claim you will receive a message via the portal.

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund B2B Administration

SESPLN1 Sign out

Application submitted

Your application for John Bingo 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:
TYF852-2402-3C08UYF3

The application reference above will help with any enquiries – please store it somewhere safe.

Finish

Searching for your applications

- 1) Click on the search for assisted applications box. Enter the date range you would like to look at and click search. This will bring up a list of 2yr applications with their status. If you click on the application then it will bring up all the details.

Welcome to the Provider Two Year Old Funding Home

Below, you will see the services available to you.

Two Year Old Funding Actions

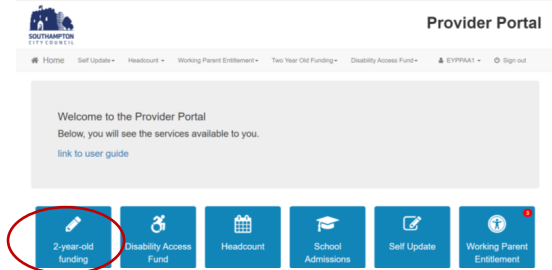
- Start an Assisted Application as a provider
- Start Placement Notification
- Start an Assisted Application as a childrens centre
- Search for Assisted Applications

Checking a 2yr old code – for Disadvantaged Children

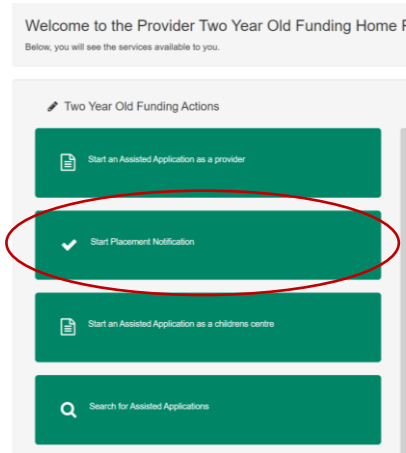
When you have a valid code for a child you will need to add them to your setting which is done by a placement notification (see below) and will add them to your headcount.

PLEASE NOTE THIS WILL ONLY WORK WITH A 2 YEAR OLD CODE STARTING WITH “TYF852”

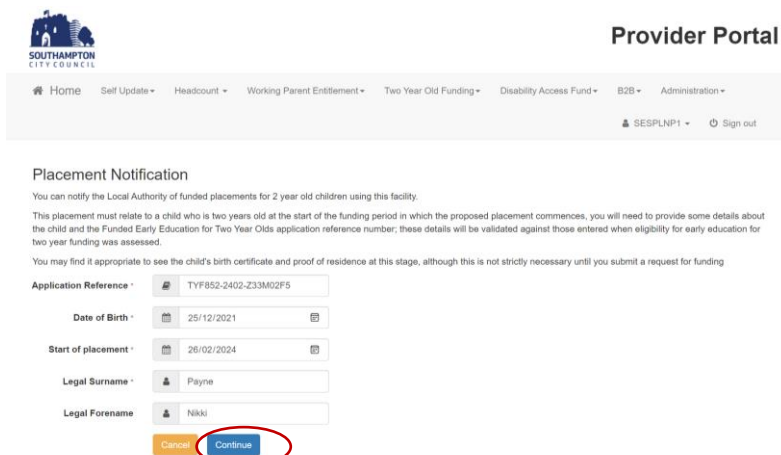
- 1) Login to the Provider Portal
- 2) Click on the Two year old funding button



- 3) Click on Start Placement Notification



- 4) After checking that you have entered everything correctly then click continue. **The start of placement date will be the first day the child is claiming funded hours at your setting.**

The image shows the 'Placement Notification' form in the Provider Portal. The form contains the following fields: 'Application Reference' (TYF852-2402-233M02F5), 'Date of Birth' (25/12/2021), 'Start of placement' (26/02/2024), 'Legal Surname' (Payne), and 'Legal Forename' (Nikki). At the bottom of the form, there are two buttons: 'Cancel' and 'Continue' (circled in red).

5) If you are satisfied everything is correct click the declaration box and then click 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	TYF852-2402-Z33M02F5
Eligibility Date	21/02/2024

Child's Details

Legal Forename	Nikki
Legal Surname	Payne
Child's Dob	25/12/2021
Postcode	SO14 7LY

Applicant's Details

Legal Forename	Susan
Legal Surname	Dunlop

Declaration

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

[Decline And Exit](#) [Agree And Continue](#)

6) Confirm the address is correct

Provider Portal

Address Confirmation

Child Details

Name	Nikki Payne
Gender	Female
Date of Birth	25/12/2021
Address	Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY

Please confirm that the address shown above is the child's current address ?

[Yes, it is correct](#) [No, it is wrong](#)

7) Confirm that the child is expected to be at that address when they start the placement at your setting

Provider Portal

Confirm Address At Placement Date

Child Details

Name	Nikki Payne
Gender	Female
Date of Birth	25/12/2021
Address	Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY

This LA will provide funded early education placements for children outside of its boundaries - for example where the provider's premises are close to a parent's place of work. Children's home addresses should always be confirmed before payment for funded hours can be claimed.

Is the current address expected to be that at which 'Nikki Payne' will be resident on 26/02/2024?

[Yes, it is correct](#) [No, I don't know](#)

8) Select the setting from the provider box and put a tick in the service box and then click continue.

Provider Portal

Placement Service Selection

Child Details

Name	Nikki Payne
Gender	Female
Date of Birth	25/12/2021
Address	Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY

Please identify the service from which the placement will be funded.

Provider: Startpoint Sholing Nursery

Service: Full Day Care

[Quit](#) [Continue](#)

9) Tick the declaration box if you agree with the statement and then click continue.

SOUTHAMPTON CITY COUNCIL

Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund B2B Administration

SESPLNP1 Sign out

Placement Declaration

Child Details

Name: Nikki Payne
Gender: Female
Date of Birth: 25/12/2021
Address: Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY

Placement Details

Service: Startpoint Sholing Nursery - Startpoint Sholing Nursery - Full Day Care
Placement Date: 26/02/2024

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

10) Click finish. This will automatically add the child to your next headcount task with the start date you entered in the placement date box – It may take up to 5 minutes for the child to appear if you have a current headcount task open.

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund B2B Administration

SESPLNP1 Sign out

Placement Summary

The notification for a funded early education placement for a two year old has been submitted for approval. You may not start claiming funded hours until you have received approval for this placement.

You will receive a message in your portal inbox when we have made our decision regarding this application.

You should discuss with the parents/carers of Nikki whether funded placements have been taken up with other settings in order to confirm whether funding may need to be shared.

Placement Details

Placement Reference: PLA852-2402-GBXVLZF3
Service: Startpoint Sholing Nursery - Full Day Care
Placement Date: 26/02/2024

Application's Details

Application Reference: TYF852-2402-Z33M02F5

Child's Details

Name: Nikki Payne
Child's DOB: 25/12/2021
Address: Civic Centre, Southampton City Council, Civic Centre Road, Southampton, Hampshire, SO14 7LY
Child's Eligibility Date: 21/02/2024

Applicant's Details

Name: Susan Dunlop
Relationship to Child: Mother

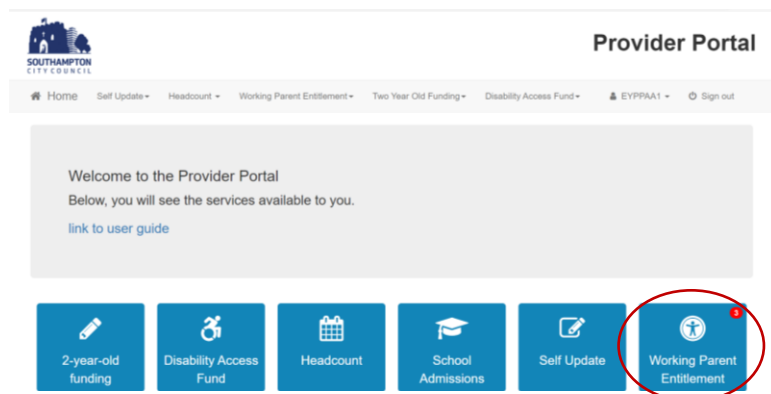
Finish

WORKING PARENT ENTITLEMENT

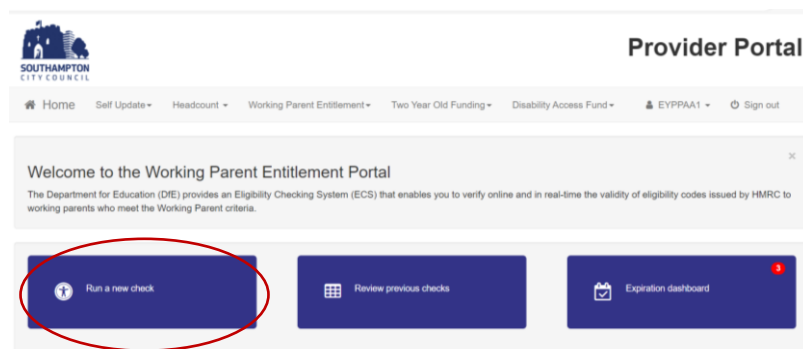
The portal will allow you to check the validity of any codes a parent presents to you and will also allow you to see any codes that are due to expire.

Checking a working parent code

- 1) Click the Working Parent Entitlement box



- 2) Click on run a new check



- 3) Add the child's forename and surname into boxes provided and if the child comes up below select them.
- 4) Add in the rest of the child's details and click run check
- 5) Enter the parents NI Number and the eligibility codes in the correct boxes making sure you have copied them correctly. Then Click Run 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 15 Hours Funded Childcare for 2 year olds and 30 Hours Funded Childcare for 3 and 4 year olds. 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.

A screenshot of the 'Run a new check' form. The form has five input fields: 'Child forename' (Nikki), 'Child surname' (Payne), 'Child date of birth' (25/12/2021 (age 2)), 'Parent National Insurance number' (sample NM123456C), and 'Eligibility code' (for example 5000100501*). The 'Parent National Insurance number' and 'Eligibility code' fields are circled in red. Below the form is a yellow box containing the child's details: 'Nikki Payne 25/12/2021 (age 2)' and a 'View Details' button. At the bottom left is a green button labeled 'Add child's details here'.

- 6) If the check is valid you will see a big green tick in a green box with the eligibility codes dates and will add the code to the child enabling you to enter the child's extended hours in your headcount.
- 7) Please note the Valid from date is the date the parent applied for the code not the date they can claim funding which is usually the term after this date.

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 15 Hours Funded Childcare for 2 year olds and 30 Hours Funded Childcare for 3 and 4 year olds. 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.

The screenshot shows the ECS interface with the following details:

- Startpoint Sholing Nursery
- Child forename: Nikki
- Child surname: Payne
- Child date of birth: 25/12/2021
- Parent National Insurance number: AB 123456A
- Eligibility code: 01234567890

A green box contains the following text:

- Code found - please check eligible dates
- No term available
- This eligibility code is valid from 20-Feb-2024 to 20-May-2024, with a grace period to 31-Aug-2024
- The parent or carer must confirm the eligibility code provided by HMRC in order to retain their working families entitlement eligibility between 22-Apr-2024 and 20-May-2024
- HMRC will notify the parent or carer when they need to reconfirm their eligibility every 3 months.

A green button labeled "Check eligibility" is at the bottom left.

- 8) If the code comes back as invalid you will see a red box – if this is the case please go back and check all the details are entered correctly and resubmit. The most common reason for failure is the child’s date of births do not match with the checker. This could be because the parent entered them incorrectly when applying or because the DOB you have entered is incorrect.
- 9) If you cannot find the child in the box, run an ad-hoc request by clicking on the green Add Child’s details here button at the bottom of the screen.

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 15 Hours Funded Childcare for 2 year olds and 30 Hours Funded Childcare for 3 and 4 year olds. 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.

The screenshot shows the ECS interface with the following details:

- Startpoint Sholing Nursery
- Child forename: Nikki
- Child surname: Payne
- Child date of birth: for example 30/11/2012
- Parent National Insurance number: for example NM123456C
- Eligibility code: for example 5000100501

A light blue box displays "No results". A green button labeled "Add child's details here" is circled in red at the bottom left.

- 10) Click on the blue OK button to confirm you wish to add a new child, then manually complete the details as required and click on the green Run check. As before you will see either a green tick (eligible) or red box (invalid)

The screenshot shows the Provider Portal interface with a confirmation dialog box. The dialog box contains the text "Do you want to add a new child?" and a blue "OK" button circled in red. The background shows the ECS interface with the same details as the previous screenshots.

Checking the dates associated with your codes

Our database will check every code due to expire daily and update your portal so they should be up to date. You can however run a manual check if you know a parent has completed their 3 monthly re-submission by:

- 1) Click on the expiration dashboard in the Working Parent Entitlement section of the Portal
- 2) Choose the filters you require and click search
- 3) This will bring up a list of children who fit the filters you searched on.
- 4) To re-check their code click on the recheck now option.

Provider Portal

Home | Self Update | Headcount | Working Parent Entitlement | Two Year Old Funding | Disability Access Fund | B2B | Administration

SESPLNP1 | Sign out

Entitlement expiration dashboard

Use this screen to track eligibility which is due to expire.

Further action needed: Yes | Days: 180 | Eligibility filter: Eligibility is ending in the next 180 days | Search

Provider: Startpoint Sholing Nursery

Filter using any keyword

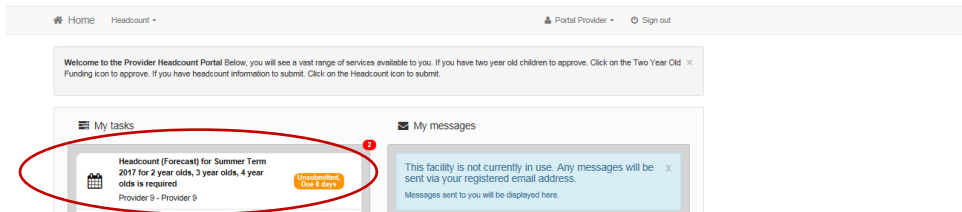
Age	Child	Earliest start date for Working parent entitlement place	Eligibility code	Application Date	Eligible to	Grace period end	Eligibility was last checked on	Notes (further action needed)
2	Nikki Payne (25/12/2021)	Not known	01234567890	20/02/2024	20/05/2024	31/08/2024	20/02/2024 Eligible Recheck now	Update

- 5) The dashboard can also show you which parents you need to remind to complete their 3 monthly resubmit via the DFE and also which parent's eligibility is ending.

HEADCOUNT

Opening New Headcount Task

- 1) Whenever the Funding team sends out a task you will receive an email letting you know.
- 2) When you receive the email, log in to the portal and view 'my tasks' on your homepage.
- 3) You will see a list of tasks for every setting that you are assigned too and that task's status.
- 4) Click on an open task – these say 'not started' or 'unsubmitted' in a coloured box (Orange for Due, Red for overdue) next to the task.



You will then be shown a list of all children that we believe are currently at your setting.

Headcount (Actual) for 2, 3 & 4 year olds Status: Edited but not yet submitted Deadline: 29 February 2024

Pre-School / Pre-School/Play-group / Spring Term 2023 (01 Jan 24 - 31 Mar 24)

You can edit and re-submit this information at any time until the deadline of 29 February 2024.

Buttons: Add Child, Edit Headcount, Download, Submit

	Legal Forename	Legal Surname	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term		
	[redacted]	[redacted]	28/03/2020	3	17/04/2023		0.00	0.00	0.00	0.00	0.00	0.00		
	[redacted]	[redacted]	03/11/2020	3	21/09/2023		0.00	0.00	0.00	0.00				

- 5) Before proceeding you will need to add missing information for each child marked with a red triangle. If you hover over the red triangle next to the child's forename it will tell you what info is missing.
- 6) Click on the blue box and this will open the child details. You will need to fill out every field with a red star next to it which is a required field. If you do not know the ethnicity please enter NOBT.



Provider Portal

Home Self Update Headcount Working Parent Entitlement Two Year Old Funding Disability Access Fund EYPPAA1 Sign out

Add Child

Legal Forename * Child's legal forename

Middle Name

Legal Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy)

Ethnicity *

First Language *

Working Parent Eligibility Code

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

Postcode *

* Required field

- To search for a language please click on the box next to the language which says please select. Then type the language you are looking for in the search box.

Child Details

The screenshot shows the 'Child Details' form with the 'Personal Details' tab selected. The 'First Language' dropdown menu is open, showing a search box and a list of languages. 'English (ENG)' is selected and circled in red. A tooltip is visible over the dropdown, stating: 'Please enter the child's first language. Enter 'NOT' if the information has not been obtained.'

- If a child is missing their Working Parent Entitlement code you will need to add it in the eligibility code box before you can add any extended hours funding on the headcount.
- You will then need to add the child's carer details which will then automatically calculate EYPP if they are eligible. If you 'decline to provide' the details then no EYPP will be paid for the child.

Provider Portal

The screenshot shows the 'Provider Portal' with the 'Child Details' form. The 'Carer Details' tab is selected. The 'Provide Carer Information' section has 'Decline to provide' selected and circled in red. The 'Save' button is highlighted.

- Fill in all the carer details as this will check the EYPP for the child. Click on 'add another carer' if you would like to add a separate carer. When all carers have been added click save.

The screenshot shows the 'Child Details' form with the 'Carer Details' tab selected. The 'Add Another Carer' button is circled in red. Below it is a form for adding a new carer with fields for Title, Forename, Surname, and Gender.

Adding a New Child

- 1) Click the add child button.

Add Child

Please enter the child's forename and surname

Forename Child's legal forename

Surname

- 2) Enter the child's forename and surname then click next.
- 3) Complete all the other details for the child.
- 4) Enter the child's Working Parent Entitlement in the eligibility box.
- 5) To find their address enter their postcode in the postcode box and click find address. Select the address from the drop down box using the arrows to scroll through all the addresses. Click select and make sure the correct address has popped up. If everything has been entered click save.

Add Child

Legal Forename

Middle Name

Legal Surname

Gender Male Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

Working Parent Eligibility Code

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

Postcode

* Required field







- 6) Enter the carer details and this will check for EYPP.
- 7) When all your children have been validated and added (a blue box next to their name) then continue with submitting your task below.

Adding a 2yr Old

- 1) Add the child as above.
- 2) See Guidance for 2yr Portal in the section at the beginning of the guidance.


Updating a Child's Address and other details

- 1) Open a task.
- 2) Click on the blue box next to the child to bring up the child's details.

	Jack	Payne	20/05/2020	3	19/04/2023		0.00	0.00	0.00	0.00				
	Nikki	Payne	23/08/2021	2	01/09/2023		0.00	0.00	0.00	0.00				

- 3) Click on the 'use another address' button

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



House Number

House Name

Street Name

District / Village

Town

County

Postcode

* Required field

- 4) To find their address enter their postcode in the postcode box and click find address. Select the address from the drop down box using the arrows to scroll through all the addresses. Click select and make sure the correct address has popped up. If everything has been entered click save.

Add Child

Legal Forename

Middle Name

Legal Surname

Gender Male Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

Working Parent Eligibility Code

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

Postcode

* Required field

- 5) To update any other details just change the incorrect detail to the correct one and click save.

Submitting a Task

- 1) Click the 'edit headcount' button

Legal Name	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term
				28.00	110.00	41.17	397.02	15.00	165.00
Jack Abba	01/01/2024		38 Week Term	11.00	30.00	15.00	165.00		
Nikki Abba	19/02/2024		51 Week Stretc	6.00	35.00	11.17	67.02		
Alec Baldwin	17/04/2023		38 Week Term	11.00	45.00	15.00	165.00	15.00	165.00

- 2) For every new child you will need to add a start date – new children have start dates highlighted green.
- 3) Select the stretch offer the child is on – **this must be completed even if they are Term Time Only.**
- 4) Complete the weeks attended for each term (Look at the week's calculator for each term to make sure you have the correct number of weeks).
- 5) Complete the average hours attended per week column which is the **actual hours** the child attends the setting in an average week.

Legal Name	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term
				28.00	110.00	41.17	397.02	15.00	165.00
Jack Abba	01/01/2024		38 Week Term	11.00	30.00	15.00	165.00		
Nikki Abba	19/02/2024		51 Week Stretc	6.00	35.00	11.17	67.02		
Alec Baldwin	17/04/2023		38 Week Term	11.00	45.00	15.00	165.00	15.00	165.00

- 6) Add the Universal Hours (Normal Funding and Disadvantaged 2 year olds) the child is claiming funding for in the Funded/Universal Hours Claimed per week column.
- 7) Add the Extended hours (Working Parent Entitlement) the child is claiming funding for in the Expanded/Extended hours claimed per week column. You will only be able to add these if the child has a valid Working Parent Entitlement code attached to them – see the Working Parent Entitlement code checking guidance above.
- 8) If a child is only claiming Extended hours with you please leave the Funded/Universal hours as 0 and put the number of extended hours they are claiming in the Expanded/Extended hours column.
- 9) **Check that the hours claimed are correct and in the correct column. This is calculated automatically however, if the child is a stretch child please overwrite this column with the correct hours.**
- 10) Once all children have been completed click save. If you are called away from completing all children click save and you can come back to it at a later date by clicking edit headcount as above.
- 11) To download a copy of the submission for your records click on the download button on the homepage which will export a copy to excel.

Removing a child from your setting

- 1) Click edit headcount.
- 2) Enter an end date for the child in the end date box.
- 3) Calculate the funded weeks the child attended the setting remembering that only full funded weeks are counted. Use the calendar in the appendix below to help.
- 4) Enter the number of funded hours the child attends.
- 5) If you have claimed for a child in the headcount payment who did not start – please enter an end date the same as the start date and leave the hours blank.
- 6) Click save.

Changing a child's funded hours midterm

- 1) From the task home page click on the add line button

	Legal Forename	Legal Surname	Date of birth	Funding Age	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term		
	Jack	Abba	01/02/2021	2	01/01/2024		38 Week Term Time Only	11.00	30.00	41.17	397.02	15.00	165.00	x	
	Nikki	Abba	05/02/2020	3	19/02/2024		51 Week Stretch	6.00	35.00	11.17	67.02			x	
	Alec	Baldwin	28/03/2020	3	17/04/2023		38 Week Term Time Only	11.00	45.00	15.00	165.00	15.00	165.00	x	

- 2) Click yes to confirm you want to add a new attendance line.
- 3) Click edit headcount
- 4) Add the day before the child changed hours as the end date on row one and enter the number of **funded weeks** the child had at the setting before this date. Please use the calendar in the appendix to calculate this remembering only full funded weeks can be claimed for.

Legal Name	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term
Jack Abba	01/01/2024	25/02/2024	38 Week Term	5.00	15.00	15.00	75.00	15.00	165.00
	26/02/2024		38 Week Term	6.00	10.00	10.00	60.00		

- 5) Add the date the child's new hours started as the second lines start date and leave the end date blank.
- 6) Overwrite the number of weeks remaining in the term in the weeks attended per term column. Update the hours columns making sure you overwrite both the average hours attended per week and the hours claimed per week columns so they are the same. In the above example Jack Abba had 5 weeks at 15 hours and then 6 weeks at 10 hours changing on the 26th February.
- 7) Click Save.

When you are happy that everything has been entered correctly and accurately click submit.

	Legal Forename	Legal Surname	Date of birth	Funding Age	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term		
	Jack	Abba	01/02/2021	2	01/01/2024	25/02/2024	38 Week Term Time Only	5.00	15.00	15.00	75.00			x	
					26/02/2024		38 Week Term Time Only	6.00	10.00	10.00	60.00			x	
	Nikki	Abba	05/02/2020	3	19/02/2024		51 Week Stretch	6.00	35.00	11.17	67.02			x	
	Alec	Baldwin	28/03/2020	3	17/04/2023		38 Week Term Time Only	11.00	45.00	15.00	165.00	15.00	165.00	x	

Click confirm once you have read the submission declaration and then click yes to submit headcount. This will then submit your headcount to the Early Years Funding Team. You can make changes up until the task deadline. After making changes please make sure you click submit again. Please do not click submit more than once a day however as this causes issues in the software.

Appendix

1) Weeks in each term table

This table shows the number of weeks in each term depending on the type of stretch offer that a child receives. For example - If a child is term time only then they receive 38 weeks a year and this is split into 13 weeks in the summer term, 14 weeks in the autumn term and 11 weeks in the spring term and the maximum number of hours they can receive across all settings they attend is 15 hours. If a child is on a 51 week stretch offer then they receive 51 weeks a year and this is split into 22 weeks in the summer term, 16 weeks in the autumn term and 13 weeks in the spring term and the maximum number of hours they can receive across all settings is 11.17 in a week.

Stretch offer	Max hours per week	Summer Term Weeks	Autumn Term Weeks	Spring Term Weeks
38 – Term Time Only	15	13	14	11
39	14.61	13	15	11
44	12.95	16	15	13
46	12.39	18	15	13
48	11.87	20	15	13
50	11.40	22	15	13
51	11.17	22	16	13
52	10.96	22	17	13

2) Weeks Calculator

See separate document sent out each term by Funding team to calculate the weeks.