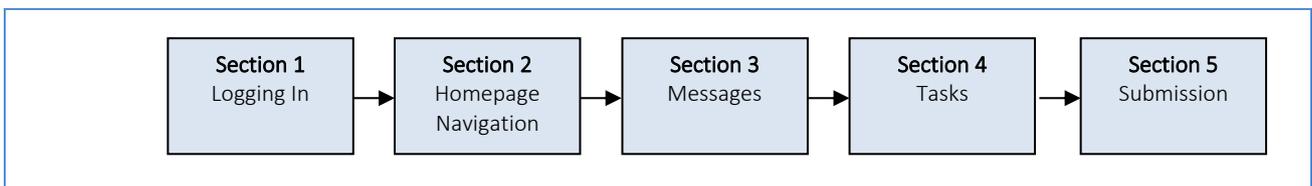




REFERENCE GUIDE: SOUTH GLOUCESTERSHIRE COUNCIL

Headcount Portal Users Guide



SECTION 1 – LOGIN TO HEADCOUNT PORTAL

Using the Web Address provided in your email.

https://oneb2b.southglos.gov.uk/ProviderPortal_LIVE/Account/Account/Login

Select the address or copy and paste into your Internet Browser address bar.

Login to **Headcount Portal** by completing the user name and password fields on the login box; then select:

Log In

Note: If you cannot remember either your Username or Password you can Select the links below the Login button and follow the instructions.

Log In

Username

Password

Log In

[Forgotten your username?](#)

[Forgotten your password?](#)

Password must

- Must contain at least 1 uppercase letter
- Must contain at least 1 lowercase letter
- Must contain at least 2 numbers
- Must contain at least 1 special character
- Must be between 10 and 128 characters long.
- Can't be the same as a previous password
- Can't be too similar to a previous password (P@ssword02 can't be used after P@ssword01)

The first time you login you will be redirected to an information page and an email will be sent to you with a confirmation Web Address, this is to ensure security

Register User

We have sent a confirmation email to your registered email address.

The email contains a confirmation link which will bring you back to the main login page.

You must use this link to continue with your registration.

Each subsequent login to the Headcount 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 the confirmation message displayed.

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

Change Password

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

Current password *

New password *

Confirm new password *

[Change password](#)

During this login 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 and Two Numbers. E.g. **Password01**

Please do not use **Password01** as your new password this is only an example.

Complete the current password, new password, confirm new password fields then select: [Change password](#)

At 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 *

Secret Answer *

[Save](#)

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

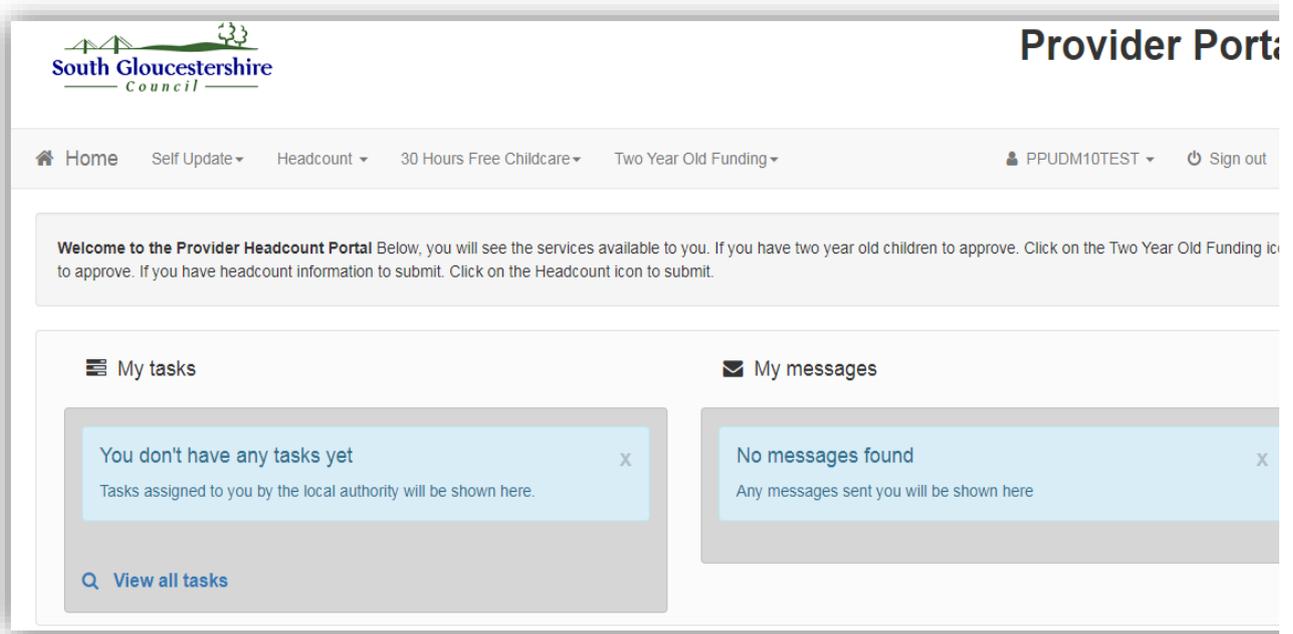
IMPORTANT NOTE: THE PORTAL WILL TIME OUT IF LEFT LONGER THAN 30 MINUTES – PLEASE SAVE YOUR WORK REGULARLY TO PREVENT LOSS OF DATA

SECTION 2 – HEADCOUNT PORTAL NAVIGATION



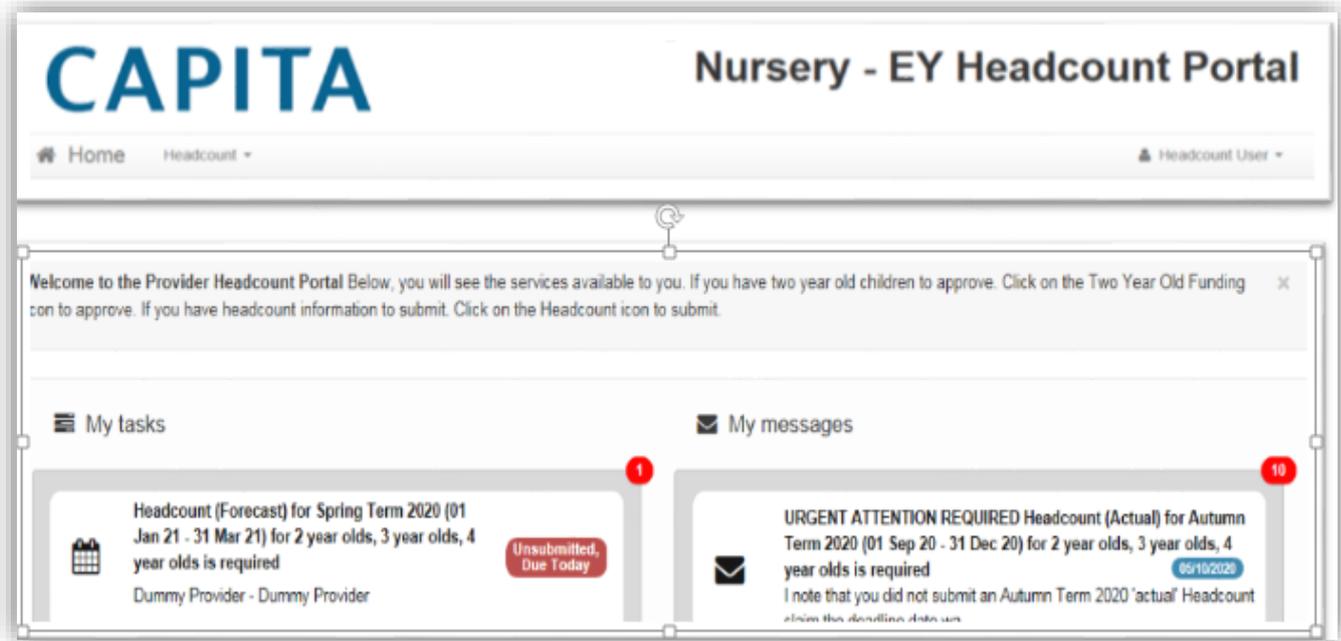
The Announcements page will be visible at every login, please read these carefully; select [Continue](#) to proceed to the Homepage.

On initial login you may not have any Tasks to complete or Messages to read, the image below shows an empty new users page.



SECTION 3 – MESSAGES

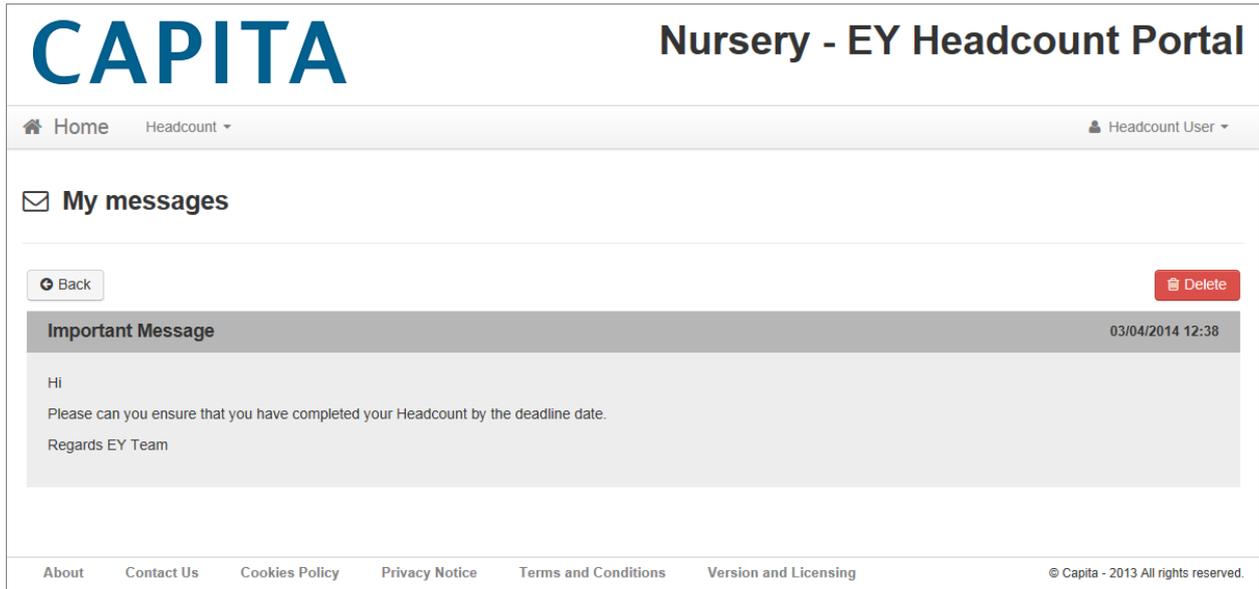
When a Message has been issued to your Setting, all relevant users will receive an email informing them to login. Once you login to the Headcount Portal you will see the Message on your Homepage.



Selecting a Message in the list allows you to read.

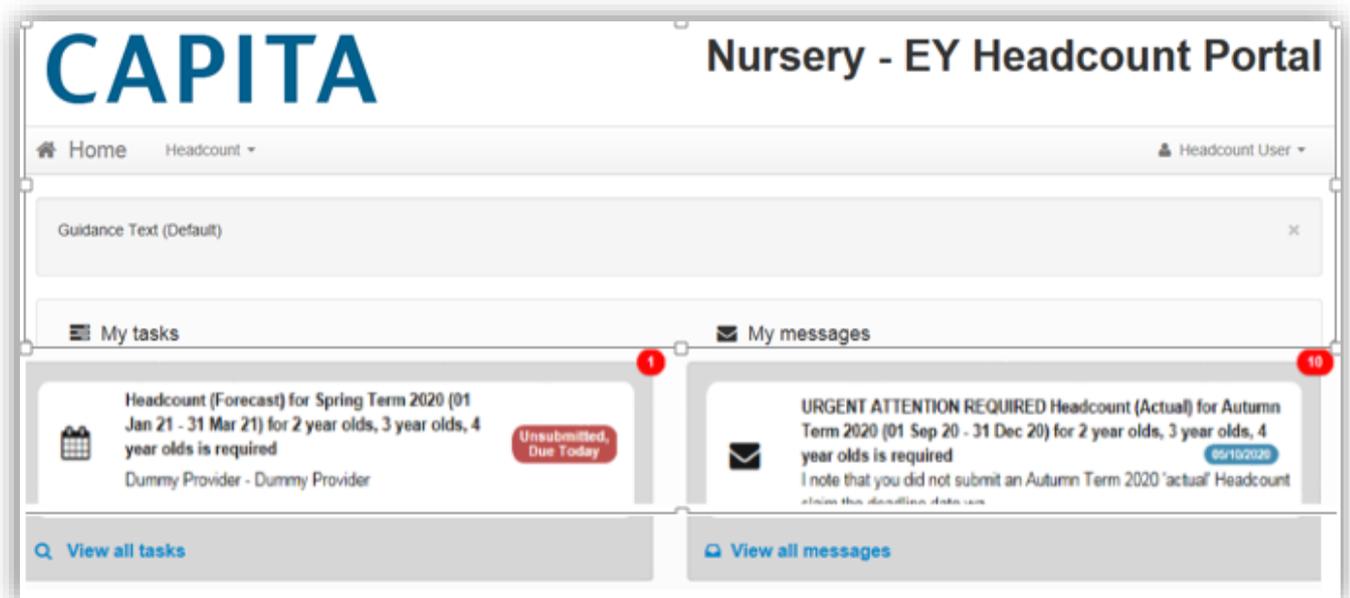
We will require a submission even if you have no children claiming by the submission deadline date.

An example message is below.



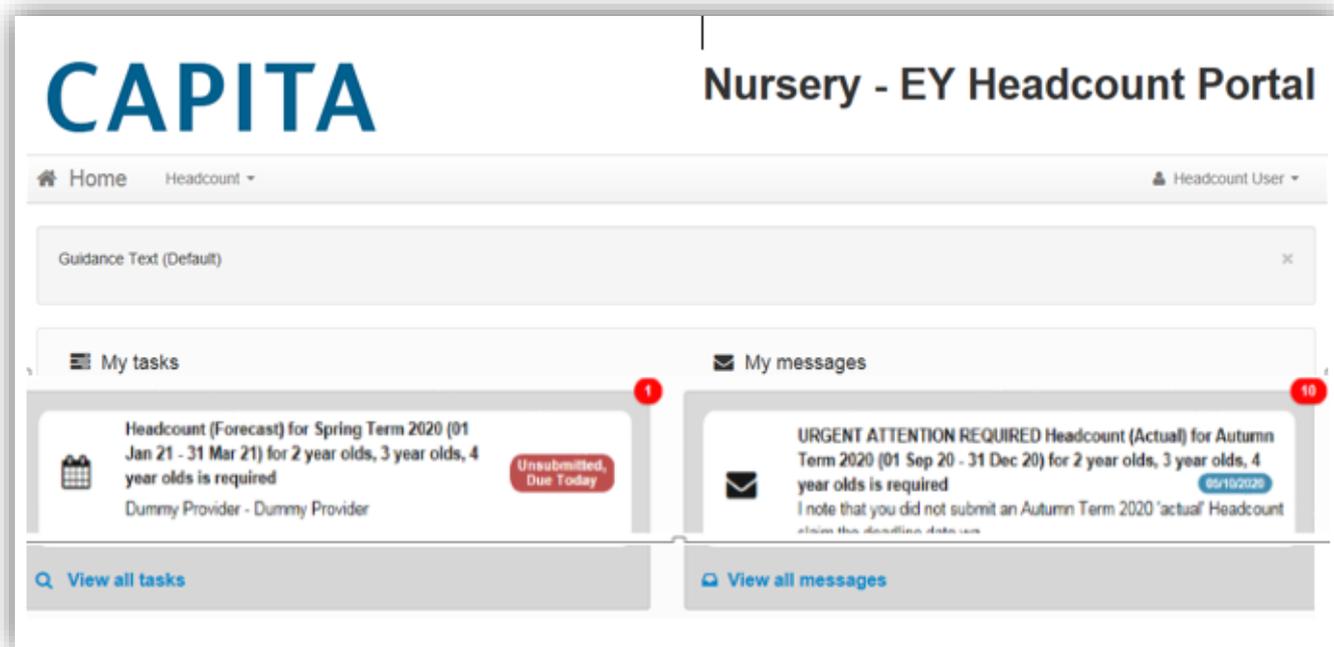
Note: You do not have to delete messages, but they will stay in your Message list and show that you have read them by the  icon changing to . The red  icon shows how many Tasks or Messages are outstanding.

An example of Task and Messages reminders:

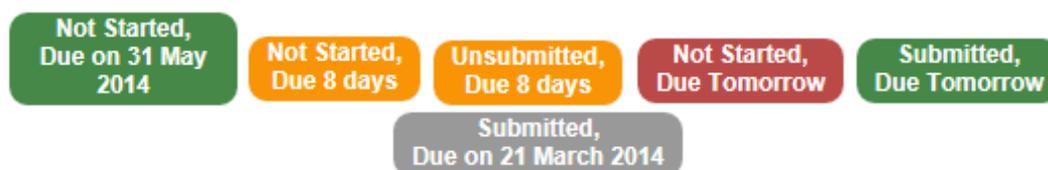


SECTION 4 – TASKS

When a Headcount Task has been issued to your Setting, all relevant users will receive an email informing them to login. Once you login to the Headcount Portal you will see the Task on your Homepage:

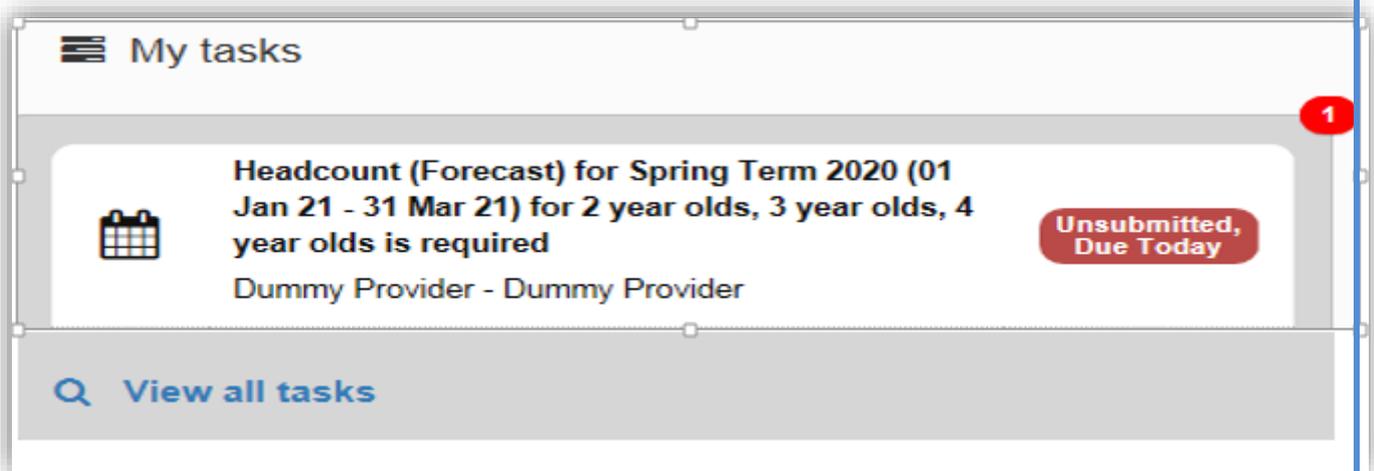


The task has a Due Date shown in the lozenge, the colour and information on this lozenge changes to show the current status, it will change to Amber and Red the nearer it gets to the Due Date, changing to Grey when the Due Date expires; examples below.



Note: Selecting a Task opens the task. Selecting an expired Task allows you to look at historic information.

Tasks Overview



- The number of currently active tasks will be listed in the top right of the My Tasks section of the provider portal
- The date that the Task is due and the status of the task are listed in a coloured box within the task pane.
- The tasks will change colour the nearer to the deadline submission that you get
- Historical tasks will be shown with a grey box

Starting the headcount

To edit the headcount, highlight the correct task within the My Tasks section and click anywhere in the box. The screen pictured below will now be opened. On this screen you will see previously claimed for, and you can add new children. The turquoise icon will turn RED if parent's details are missing. If the icon is red for each child, click on edit headcount then click the RED icon next to each child's name. To claim pupil premium (additional 53p an hour if eligible) select provide parent/carer details and complete or decline to provide. Then click save.

To amend an existing child's details click the turquoise screen icon next to the child you wish to amend. You will now need to include other ethnicity and language details. This data has now been requested by the government and will need to be included for existing children. Please remember to click save after each child is completed.

The screenshot shows the CAPITA Nursery - EY Headcount Portal. At the top, there is a navigation bar with 'Home' and 'Headcount' menus, and a user profile for 'Headcount User'. The main heading is 'Headcount (Forecast) for 2, 3 & 4 year olds', with a status of 'Unsubmitted' and a deadline of '05 November 2020'. Below this, the provider is identified as 'Dummy Provider' and the term as 'Spring Term 2020 (01 Jan 21 - 31 Mar 21)'. A filter dropdown is open, showing 'Filter by Forename or Surname or Age'. Below the filter are buttons for 'Add Child', 'Edit Headcount', 'Download', and 'Submit'. A table of child data is visible below the buttons, with columns for Legal Forename, Legal Surname, Funding, Date of birth, Funding Age, Start Date, End Date, Weeks Attended for term, Universal Hours Claimed per week, and Extended Hours Claimed for term. The table currently shows one row with all values set to 0.00.

Adding a Child to your Headcount

If you have a child not listed in the headcount, you will need to add your child to this Headcount Task.

Select: [Add Child](#)

Please note there are two tabs: Personal Details and Carer Details.

The screenshot shows the 'Add Child' form in the CAPITA portal. The form has a heading 'Add Child' and a sub-heading 'Please enter the child's forename and surname'. There are two input fields: 'Forename' and 'Surname', each with a small edit icon. Below the input fields are two buttons: 'Cancel' (orange) and 'Next' (blue).

Complete the relevant fields with the child's Legal Forename and Surname and then select: [Next](#) to display the personal details tab

Add Child

Forename

Middle Name

Surname

Gender Male
 Female

Date of birth (dd/mm/yyyy)

Ethnicity

First Language

SEND Status

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 [here](#).

Postcode

* Required field

- If required enter **Middle Name**.
- Choose the child's **Gender** and enter their **Date of Birth**.
- Select **Ethnicity** and **First Language** from the drop-downs.
- If required enter **ELIGIBILITY CODE (THIS IS ONLY FOR 30 HOUR CODES)**.
- If required select **SEND** Status.
- Enter **Postcode** and click **Find Address** to display list of matching addresses.
- Select the required address to display address details.
- Alternatively, click the [I don't have a postcode](#) to **ENTER ADDRESS MANUALLY** then click **SAVE** button.

If the correct Address is returned select it in the list.

Note: If no suitable Addresses are returned you can select:

[Enter Address Manually](#)

and type the new address in.

Add Child

[Personal Details](#) [Contact Details](#) [Other](#)

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed to this postcode, you can look it up [here](#).

Postcode *

[Find Address](#)

[Enter Address Manually](#)

Church Walk, Marston Moretayne, BEDFORD, Simshire, MK43 0NE
34, Church Walk, Marston Moretayne, BEDFORD, Simshire, MK43 0NE

[Previous](#)

[Next](#)

Add Child

[Personal Details](#) [Contact Details](#) [Other](#)

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed to this postcode, you can look it up [here](#).

House Number *

House Name

Street Name

District / Village

Town

County

Postcode *

[Find Address](#)

[Previous](#)

[Next](#)

Click **SAVE** button

Recording Carer Details

The Carer Details tab is displayed if the child is either 3 or 4 years old. To record a Carer details: Click the red button adjacent to the child's name to display the **Carer Details** tab.

Child Details

Personal Details Carer Details

Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non-economic route e.g. 'Looked-After' status (LAC).

Provide Carer Information - Yes Decline to provide

Previous Next

Required field

Cancel Save

IMPORTANT NOTE IF THE PARENT/CARER HAS GIVEN PERMISSION ON THEIR EY4P FORM FOR YOU TO INCLUDE THEIR CHILD IN THE BULK AUTOMATED PUPIL PREMIUM CHECK YOU MUST ENTER 'YES' TO PROVIDE CARER INFORMATION ALTERNATIVELY IF THE CARER DOES NOT WISH TO PROVIDE ANY DETAILS SELECT **DECLINE TO PROVIDE BUTTON. CLICK TO SAVE**

Select the **Yes** radio button to display the **Carer Details** panel.

Child Details

Personal Details Carer Details

Carer information is required to allow an economic assessment for Early Years Pupil Premium. If the information is not provided, no EYPP can be paid for this child unless the child qualifies via a non-economic route e.g. 'Looked-After' status (LAC).

Provide Carer Information - Yes Decline to provide

+ Add Another Carer

Title - [dropdown]

Forename - [text]

Surname - [text]

Gender - Male Female

Date of Birth (dd/mm/yyyy) - [calendar icon]

Relationship - [dropdown]

Parental Responsibility - Yes No
If the carer has legal responsibility for this child select Yes

Reference Number - National Insurance National Asylum Support Service

Address - [text]

Does the applicant live at the same address as the child?
 Yes 39 Stanley Boulevard, Kierlington, Milford, Cardshire, C3 5DB
 No

Previous Next

Required field

Cancel Save

CLAIMING HOURS ON YOUR HEADCOUNT

Headcount (Forecast) for 2, 3 & 4 year olds

Dummy Provider / Dummy Provider / Spring Term 2020 (01 Jan 21 - 31 Mar 21)

Status: Edited but not yet submitted Deadline: 05 November 2020

You can edit and re-submit this information at any time until the deadline of 05 November 2020.

Submit

Add Child Edit Headcount Download

	Legal Forename	Legal Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
	Daisy	Cooper		31/12/2017	3	01/01/2021		12.00	0.00	0.00	0.00	0.00

To add the hours against the children in the list select:

Edit Headcount

Edit - Headcount (Forecast) for 2, 3 & 4 year olds

Dummy Provider / Dummy Provider / Spring Term 2020 (01 Jan 21 - 31 Mar 21)

Status: Edited but not yet submitted Deadline: 05 November 2020

Legal Name	Funding	Start Date	End Date	Weeks Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
Daisy Cooper		01/01/2021		12.00	0.00	0.00	0.00	0.00

Cancel

Save

South Gloucestershire Council Headings:

Legal Name	Funding	Start Date	End Date	Week attended for term	Universal Hours Attended per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
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IMPORTANT NOTE END DATE: If a child has left your setting in the previous term leave all cells blank including the leaving date. An end date is required ONLY if a child has left during the current term otherwise, leave this blank.

Enter weeks attended for term, if not pre-populated will be maximum 12 weeks Spring, 13 weeks Summer and 13 weeks Autumn.

Then enter universal and if appropriate extended hours attended per week, the universal and extended ours claimed for term columns will then populate - **remember to save before submitting.**

Hours that are pre-populated from the v4 Client are coloured green. If they have been added or updated in the Headcount portal, they are coloured blue.

The **Funding** column displays a coloured letter or symbol as shown in the following table:

Symbol	Description
	The child is eligible for Early Years Pupil Premium
	The child is eligible to receive extended hours childcare for one or more days in the term to which this task applies. The colour of this symbol changes to amber when the child nears the end of their eligibility or red when it is past their eligibility end date.
	The child is sharing funding with another service or another provider. The colour of this symbol changes to dark blue if the child shared funding in the previous term.
	The child became eligible for 2 year old funding before the start of the term being viewed and hovering over it displays the eligibility reference.
	The child cannot claim hours and does not have an override.
	The child has an override which is Force the system to never allow hours to be claimed.
	The child has an override, which is Force the system to always allow hours to be claimed.

Free entitlement hours claimed per week is capped at 15 hours –You can leave them if they are correct, or key in the actual hours if the child is claiming less hours at your setting.

Headcount (Forecast) for 2, 3 & 4 year olds Status: Edited but not yet submitted Deadline: 05 November 2020

Dummy Provider / Dummy Provider / Spring Term 2020 (01 Jan 21 - 31 Mar 21)

Filter by Forename or Surname or Age

Add Child Edit Headcount Download Submit

	Legal Forename	Legal Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
	Daisy	Cooper	<input type="checkbox"/>	31/12/2017	3	01/01/2021		12.00	15.00	180.00	0.00	0.00

Whilst settings may 'stretch' the universal and extended funded entitlement hours beyond the 38 week period, for funding purposes both universal and extended funded entitlement hours must be claimed in the portal as if taken over the 38 week period - the actual delivery pattern should be shown on the child's EY4P –parental declaration form

SECTION 5 - SUBMISSION

When you have added all your children to the list select:

Submit

Submission Declaration

Certification

I certify that the number of hours claimed are correct for each pupil and signed for by the parent /guardians(s) of the pupils. These hours can/will be substantiated by the official registers. I understand that this claim will be subject to an audit at a later date.

I have read the Local Conditions of Funding and agree to comply with them.

I have checked:

- 1) That all parents have signed & completed the number of hours required.
- 2) That hours claimed are based on hours attended for the term.
- 3) That where I am aware that hours are claimed at my setting and another, that added together they do not exceed the maximum entitlement.

Cancel Confirm

Select: **Confirm** on the confirmation screen.

Submit Headcount

Are you sure you wish to submit this information?

No Yes

Select: **Yes** on the confirmation screen.



Attendance submitted successfully !

Note: You can continue to add children and hours to this list and resubmitting until the deadline date

IMPORTANT NOTE:

ONCE YOU SUBMIT YOUR HEADCOUNT, IF YOU MAKE ANY FURTHER CHANGES TO YOUR HEADCOUNT DATA YOU WILL NEED TO RE-SAVE THE CHANGES AND THEN RE-SUBMIT OTHERWISE, THE CHANGES WILL NOT BE REGISTERED ON OUR SYSTEM. HEADCOUNT DETAILS CAN BE EDITED BEFORE MIDNIGHT ON THE DEADLINE DATE.

If you Submit part completed data and the deadline passes you will not be able to edit the data again and this will act as you submission.