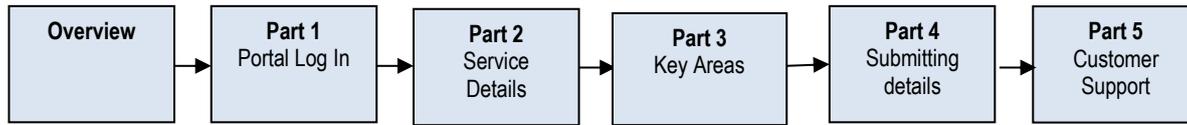


Self-Update Portal – USER GUIDE



OVERVIEW

The Self Update portal allows early years settings to maintain provision information themselves in relation to a number of areas such as:

- Basic service information
- Opening times
- Vacancy information
- Costs
- Early Years Census (Collected every Spring term for PVI's)

Information supplied on the self-update portal is then used by the council to deliver childcare services to parents/carers. Information is also published (where consent provided by EY setting) on <https://www.mylifeinbolton.org.uk/> where parents/carers can search for registered childcare.

PART 1 - PORTAL LOG IN

Access to the Self Update Portal is through the Provider Portal which can be accessed using the link below:

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

Login to the Provider Portal by completing the **Username** and **Password** fields and then *click* 

Log In

Username

Password

[Forgotten your username?](#)
[Forgotten your password?](#)

NB. If either the **Username** or **Password** has been forgotten, *select* the links that are below the **Log In** button and follow the instructions.

NB. Passwords must contain at least 8 characters; and must contain upper case, lower case, a special character and 2 numbers. E.g. Autumn83%.

NB. The system will periodically force users to change their existing password.

NB. Users are logged out after 20 minutes of inactivity.

When the **Username** and **Password** have been input correctly the Secret Question Page will display (see below).

Input the secret answer to the secret question and then click

Submit

Secret Question

Please provide the answer to your secret question

Secret Question



1st school you attended?

Secret Answer *



Submit

[Forgotten your secret answer?](#)

If the **Secret Answer** has been forgotten - click on *Forgotten your secret answer* and follow the instructions.

Once successfully logged in you will be taken to the announcements page:

Bolton Council

Bolton Council's Provider Portal

[Home](#) [B2B](#) [Administration](#)

[CARTERS](#) [Sign out](#)

Announcements

2yr old eligibility checks for families claiming universal credit

Please note the government are currently updating their data to apply the new universal credit threshold for early education funding checks. Any checks done on the portal for families claiming universal credit will come back as 'not found' until at least April 2018. Some families may still be eligible for 2yo funding if they receive universal credit and the household earns less than £15,400. If families are on universal credit and believe they are eligible please ask them to take the last 3 award notices (each award notice will cover 1 calendar month) to the Start Well Children's Centre for verification.

Continue

Continue

After reading any announcements, click [Continue](#) to get to the Portal Home Page:

Welcome to the Provider Portal

Below, you will see the services available to you.

The services available through the Provider Portal are:

- Headcount
- 2 Year Old Eligibility Checker
- 30 Hours Eligibility Code Validation Checker

If you do not have access to a service listed above and would like to, please contact us at one.support@bolton.gov.uk for the Headcount or the 30 Hours Validation Checker. For access to the eligibility checker, please email families@bolton.gov.uk



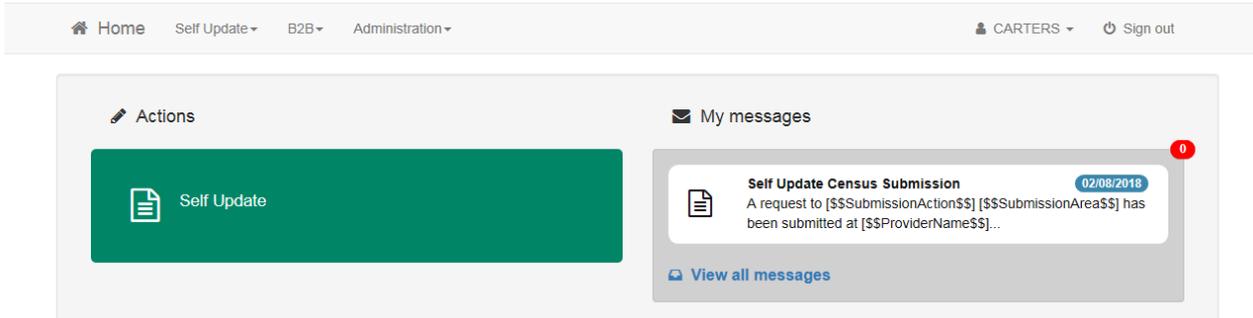
To access the **Self Update Portal**, *click*

The **Self Update Portal Home Page** will now be displayed (see below).

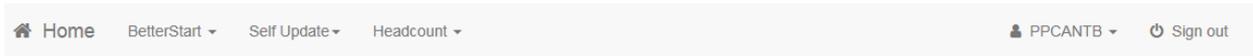
This page contains the icons for accessing their Service information and messages.



Bolton Council's Provider Portal (TEST)



The drop-down menus at the top of the page are available from all the Self Update pages:



*Click **Home*** - to return to the [Provider Portal Home Page](#).

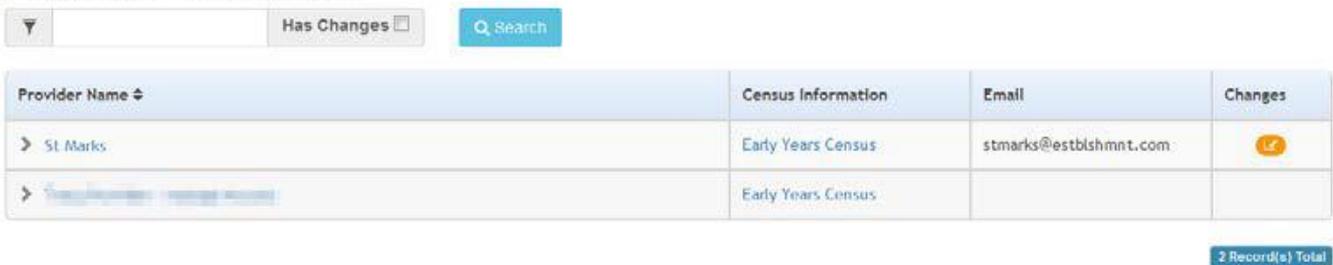
*Click **Self Update*** - to view and or amend the Service provider details. These options will be discussed in this Guide.

*Click **User name*** select from the drop-down menu to change password, secret question or activate two stage verification.

*Click **Sign out*** to log out of the Portal (this method should *always* be used when logging out) which displays the log in screen.

Select the green **Self Update** action to display the **Providers - Self Update** page with a list of providers to which you have access. If you have multiple settings, you will see them listed here:

Providers - Self Update



Click the link for the required provider to display the **Services - Self Update** page with a list of services for this provider

Services - Self Update

Self Update / St Marks

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
> St Marks - Full Day Care	Full Day Care	06/07/2007		ECD		Clear All

Back

Add Service

***Please note you cannot add a new service on this screen. If you wish to add a new service contact us using the details in 'Part 6' of this document.**

PART 2 – Information that can be updated

The provider can update the following areas using the tabs displayed at the top of the screen:



A description of each area is below plus details of any sub tabs within the options above

Area	Notes
Service Details	Contains info on EY setting, contact numbers and address
Consent	Contains information on what information you want made available to the public. It is essential this information is checked by each EY setting.
Availability and Capacity	Contains information on opening times, capacity and vacancy info. 4 sub tabs as follows:
Travel	Contains information on travel such as parking, bus routes, school pickups etc. 2 sub tabs as follows:
Costs	Contains information on costs and discounts offered. 2 sub tabs as follows:
Facilities	Contains information on special facilities, languages spoken etc

PART 3 – Type of data entry fields

On each tab information there are various data entry fields. The table below shows how to use/update these:

Field Type	Description
DO NOT USE	Indicates that this field should not be changed. Please leave values as they are.
	Text field that is limited. E.g. Setting Name.
	Drop down list of options to select. Click the down arrow  to see options you can select.
	Date field. Use the calendar or enter date in format DD/MM/YYYY
	Tick Box. A tick indicates 'True'. In the example below the provider is indicating they offer a sibling discount: <div style="display: flex; align-items: center; gap: 20px;"> Sibling Discount <input type="checkbox"/> <input checked="" type="checkbox"/> </div>
	Free text entry where you can enter a paragraph.

PART 4 – Changing and Submitting Your Information

The provider can update the relevant fields that need changing. Once changed then press  to submit the changes to Bolton Council.

Please note that that there is a **submit button for each tab and sub tab** (described in Part 2) so you will

have to click  for each screen/page you change.

Any sections that are changed are highlighted by the icon . This icon means the changes have been submitted to Bolton Council and are awaiting approval. This icon is highlighted in several areas:

- Against the field

Contact For Vacancies

- Against the tab/sub tab

 Opening Dates

 Availability

 Age Range

 Capacity Details

 Vacancies 

- Against the services screen

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
> Canterburys 2 - Full Day Care	Full Day Care	22/10/2010		ECD		Clear All

Once Bolton Council approve the changes the icon will disappear and you will receive an automated email notification of the approval.

PART 5 – Updating capacity & vacancy information

In this section we will explain how to update your capacity & vacancy information which is used to carry out childcare sufficiency assessments. To update go to the [Availability and Capacity](#) tab and then select the

sub tab [Capacity Details](#).

You will then be presented with the following screen:

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0 - 2 (Age 0 to 2)	0	2	24	
Age 2 - 3 (Age 2 to 3)	0	2	50	
Age 3 - 4 (Age 3 to 4)	0	2	30	
Age 4 - 5 (Age 4 to 5)	0	2	30	

[Add Age Range](#)

[Add Age Range](#)

If there is an age range missing then you can add a new one by clicking

The table shows what age ranges should be used for each type of provider:

Childminder	Full Day-care (Including Schools with nurseries)	Playgroups	Holiday Clubs
Age 0 - 1	Age 0 – 2 (Under 2's)	Age 2 – 3 Year Olds (2-year olds)	Age 3 – 4 Year Olds (3-year olds)
Age 1 - 5	Age 2 – 3 Year Olds (2-year olds)	Age 3 – 4 Year Olds (3-year olds)	Age 4 – 5 Year Olds (4-year olds)
Age 6 - 8	Age 3 – 4 Year Olds (3-year olds)	Age 4 – 5 Year Olds (4-year olds)	Age 5 – 14 Year Olds
Age 8+	Age 4 – 5 Year Olds (4-year olds)		

PART 6 – Early Years Census

Once a year (in Spring Term) we will ask PVI settings to complete the Early Years Census information regarding their setting. This will be sent out via a task in the Provider Portal.

On the screen below you will see the provider settings that your account is linked to. You will need to click on the 'Early Year Census' link to be taken to the census form.

Bolton Council Bolton Council's Provider Portal (TEST)

Home BetterStart Self Update Headcount 30 Hours Free Childcare Two Year Old Funding Administration

SMITHC6 Sign out

Providers - Self Update

Has Changes Search

Provider Name	Census Information	Email	Changes
Blathers Nursery	Early Years Census	blathersnursery@gmail.com	

1 Row(s) Total

Once you have clicked on the link you should see a page like the one below. The first section is about opening and closing times. It will automatically populate your funding weeks, weeks open and times with default figures.

Availability and Opening Times	
No. of Funding Weeks *	<input type="text" value="38"/>
No. of Weeks Open *	<input type="text" value="52"/>
Monday opening time	<input type="text" value="08:00"/>
Monday closing time	<input type="text" value="13:07"/>
Tuesday opening time	<input type="text" value="08:00"/>
Tuesday closing time	<input type="text" value="13:07"/>
Wednesday opening time	<input type="text" value="08:00"/>
Wednesday closing time	<input type="text" value="13:07"/>
Thursday opening time	<input type="text" value="08:00"/>
Thursday closing time	<input type="text" value="13:07"/>
Friday opening time	<input type="text" value="08:00"/>
Friday closing time	<input type="text" value="13:07"/>
Saturday opening time	<input type="text" value="HH:MM (24hr)"/>
Saturday closing time	<input type="text" value="HH:MM (24hr)"/>
Sunday opening time	<input type="text" value="HH:MM (24hr)"/>
Sunday closing time	<input type="text" value="HH:MM (24hr)"/>
Continuously Open	<input checked="" type="checkbox"/> <input type="checkbox"/>

If these are not correct for your setting then you will need to change them so that they are correct. Here is an example of what it should look like once it has been filled in.

Availability and Opening Times	
No. of Funding Weeks *	<input type="text" value="38"/>
No. of Weeks Open *	<input type="text" value="48"/>
Monday opening time	<input type="text" value="9:00"/>
Monday closing time	<input type="text" value="17:00"/>
Tuesday opening time	<input type="text" value="9:00"/>
Tuesday closing time	<input type="text" value="17:00"/>
Wednesday opening time	<input type="text" value="7:00"/>
Wednesday closing time	<input type="text" value="18:00"/>
Thursday opening time	<input type="text" value="9:00"/>
Thursday closing time	<input type="text" value="17:00"/>
Friday opening time	<input type="text" value="7:00"/>
Friday closing time	<input type="text" value="16:00"/>
Saturday opening time	<input type="text" value="HH:MM (24hr)"/>
Saturday closing time	<input type="text" value="HH:MM (24hr)"/>
Sunday opening time	<input type="text" value="HH:MM (24hr)"/>
Sunday closing time	<input type="text" value="HH:MM (24hr)"/>
Continuously Open	<input checked="" type="checkbox"/> <input type="checkbox"/>

The second section is about staffing information

Total Staff Information	
Total Number of Staff *	<input type="text" value="0"/> <small>Number of total staff should be between 1 and 999</small>
Level 2 Qualification *	<input type="text" value="0"/>
Level 3 Qualification - Non-managerial *	<input type="text" value="0"/>
Level 3 Qualification - Managerial *	<input type="text" value="0"/>
Qualified Teacher Status *	<input type="text" value="0"/>
Early Years Professional Status *	<input type="text" value="0"/>
Early Years Teacher Status *	<input type="text" value="0"/>

Please enter the staffing information for your setting. If a member of staff has multiple qualifications, count them based on the highest level qualification they have got. Here is an example of what it should look like once it has been filled in.

Total Staff Information	
Total Number of Staff *	<input type="text" value="15"/>
Level 2 Qualification *	<input type="text" value="3"/>
Level 3 Qualification - Non-managerial *	<input type="text" value="7"/>
Level 3 Qualification - Managerial *	<input type="text" value="2"/>
Qualified Teacher Status *	<input type="text" value="1"/>
Early Years Professional Status *	<input type="text" value="1"/> <small>Current Value: 0</small>
Early Years Teacher Status *	<input type="text" value="1"/>

The 3rd section is the total number of children at your setting. In this section it will pull through figures from your headcount. If there are any children that are not on your headcount due to them not being funded, please make sure you count them in this figure.

Here is an example of what it may look like when you first look at it.

Number of Children By Age	
Number of 2 year olds *	10
Number of 3 year olds *	5
Number of 4 year olds *	11

Please make sure the figures are correct and change them if they are not.

Number of Children By Age	
Number of 2 year olds *	17
Number of 3 year olds *	4
Number of 4 year olds *	13

Finally, at the bottom of the screen is the submission button. Click it to submit your Early Years Census setting Information.

Back No Changes Required Save Draft Submit

The message below will then display.

Submission Declaration

I confirm that all the values are correct and no changes are required

No Yes

Click 'Yes' and you will have submitted your Setting Information to and we will begin to process it.

PART 7 – Support

If you experience any issues in using the Self Update Portal you can call the Data Management Team on Tel: 01204 338620 / 01204 332129 / 01204 337461

Email ec.imu@bolton.gov.uk with details.

Appendix 1 – Key Icons

When viewing a screen, many details are shown using small icons or 'flags' in a variety of locations on the screen.

Flag	Description	Flag	Description
	Do Not Use		Return to Previous Screen
	Select (for Addresses)		Clear (Service details)
	Search (for Providers)		Changes (Pending authority approval)
	Add Opening Date		Submit (to Authority)
	Greyed out or not available		Available

Appendix 2 – Provider Guidelines for Self-Update portal content and associated responsibilities.

- It is a Provider responsibility to check the length of any text entered.
- It is a Provider responsibility to check for factual errors.
- Availability information should be updated when required.
- All data should be checked at least once per term.
- The updated details for a provider will be checked by Data Management prior to the updating of the One Data Base and the provider portal.