



Headcount Portal User Guide

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SECTION 1 – LOGIN TO PROVIDER PORTAL

Using the Web Address provided in your email.

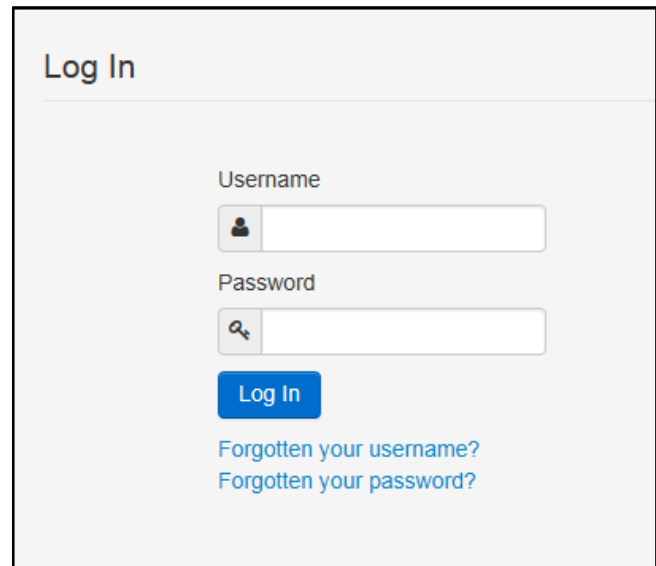
https://ems.bolton.gov.uk/ProviderPortal_LIVE/Account/Account/Login

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. **You will only get 3 attempts to login so if you do not know your password, click on 'Forgotten your password' after your second attempt to avoid locking your account. You will be then be sent a temporary password to login.**



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

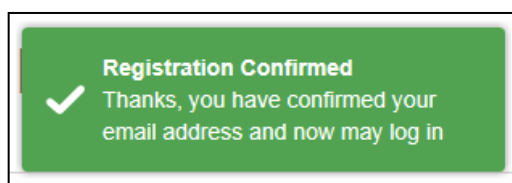
We have sent a confirmation email to your registered email address.

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.



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 10 characters; and must contain Upper Case, Lower Case, Two Numbers and a special character**. 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; and 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

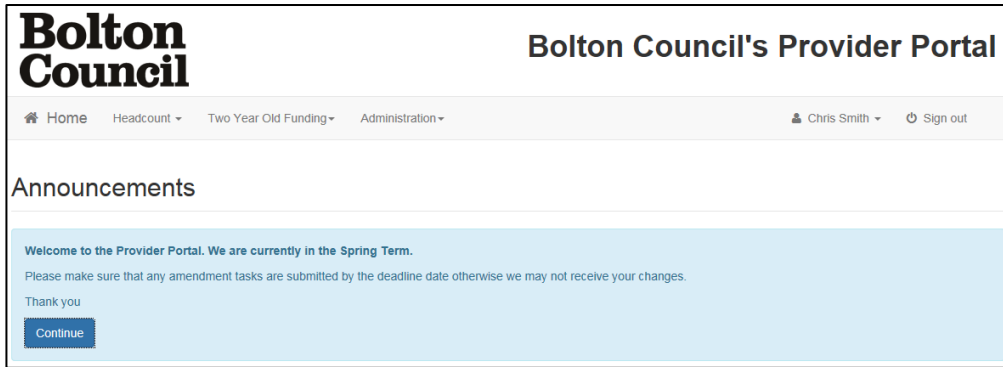
Secret Question *

Secret Answer *

[Save](#)

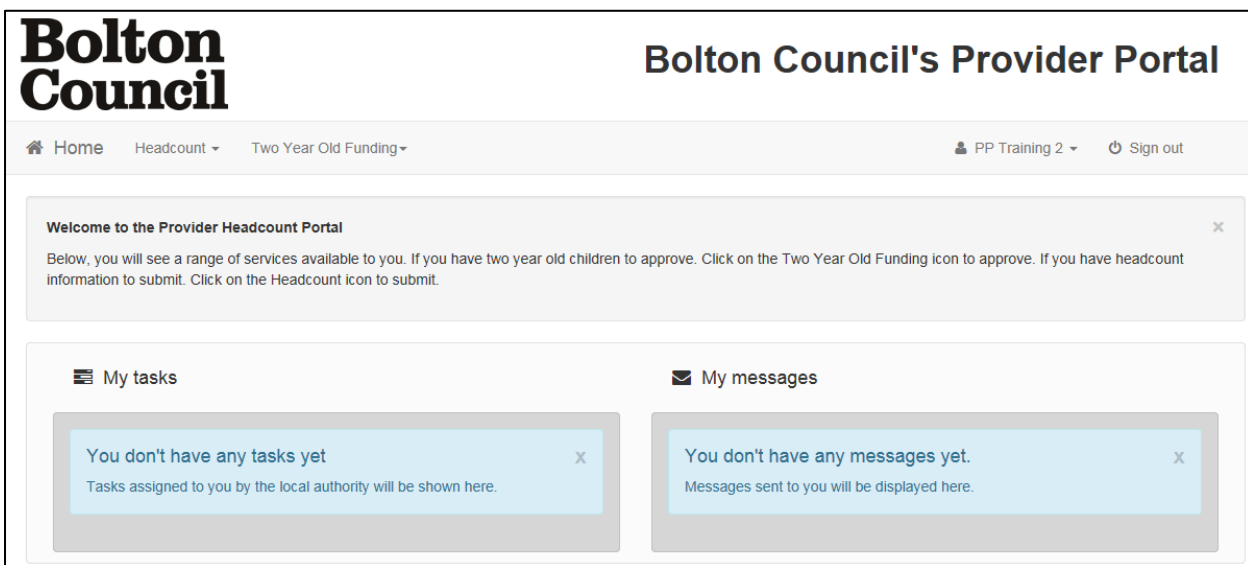
Congratulations you have now successfully logged in for the first time, and will have access to the Provider Portal.

SECTION 2 – HEADCOUNT PORTAL NAVIGATION

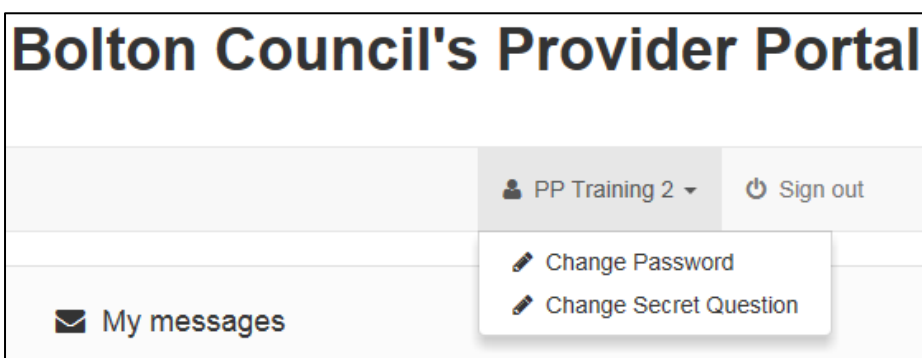


If there are any announcements, you will see this screen when you first login. Please read through it carefully and then click **Continue** to proceed to the Homepage.

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



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



Guidance text can be provided, these can be closed but will become visible again on each new login

Closing this guidance text will dismiss it for this session, it will reappear next time you login. X

old children to approve. Click on the submit. Click on the Headcount icon




SECTION 3 – MESSAGES

When a Message has been issued to your Nursery, 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.

The screenshot shows the Bolton Council's Provider Portal homepage. At the top left is the Bolton Council logo. The page title is "Bolton Council's Provider Portal". Below the title is a navigation bar with links for Home, Headcount, Two Year Old Funding, and Administration. On the right of the navigation bar, it shows the user name "Chris Smith" and a "Sign out" button. A welcome message box states: "Welcome to the Provider Headcount Portal. Below, you will see a range of services available to you. If you have two year old children to approve. Click on the Two Year Old Funding icon to approve. If you have headcount information to submit. Click on the Headcount icon to submit." Below this, there are two main sections: "My tasks" and "My messages". The "My messages" section has a red notification bubble with the number "1". It displays a message: "Headcount (Actual) for Autumn Term 2015 for 2 year olds, 3 year olds, 4 year olds is required" with a sub-message "Please complete the headcount that we have sent you" and a timestamp "Today 14:39". A "View all messages" link is also visible.

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

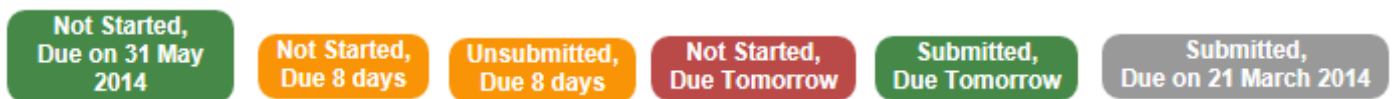
The screenshot shows the Bolton Council's Provider Portal with a message selected. The navigation bar is the same as in the previous screenshot. The "My messages" section is expanded, showing a "Back" button on the left and a "Delete" button on the right. The selected message is: "Headcount (Actual) for Autumn Term 2015 for 2 year olds, 3 year olds, 4 year olds is required" with a timestamp of "02/12/2015 14:39". Below the message title, it says "Please complete the headcount that we have sent you".

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.

SECTION 4 – TASKS

When a Headcount Task has been issued to your Nursery, 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 an expired Task allows you to look at historic information.

Selecting a Task opens it.

Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 August 2017

Blathers Nursery / Blathers Nursery / Autumn Term 2017 (01 Sep 17 - 31 Dec 17)

Add Child
Edit Headcount
Download
Submit

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term (Spring Term Max = 11 Weeks)	Average Hours Attended per Week	Hours Attended for Term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term		
	Fred	Bolton	✓	27/02/2015	2	01/01/2016		0.00	0.00	0.00	0.00	0.00			✕	🔄
	Eric	Cartman	EH	10/10/2013	3	08/04/2017		14.00	20.00	280.00	15.00	210.00	5.00	70.00	✕	🔄
	Fred	Golightly	P EH	12/12/2013	3	29/03/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00	✕	🔄
	Amelie	Haslam	2	30/05/2015	2	01/03/2017		14.00	20.00	280.00	15.00	210.00			✕	🔄
	Ted	Jones	EH	12/12/2013	3	08/04/2017	30/09/2017	4.00	20.00	80.00	15.00	60.00	5.00	20.00	✕	🔄
01/10/2017							10.00	35.00	350.00	15.00	150.00	15.00	150.00	✕	🔄	
	Lucie	Knight	2	18/12/2014	2	04/04/2017		14.00	10.00	140.00	10.00	140.00			✕	🔄
	John	Miller	✓	10/10/2014	2	08/04/2017		14.00	15.00	210.00	15.00	210.00			✕	🔄
	Tony	Newstart	N	12/11/2014	2	27/03/2017		14.00	15.00	210.00	0.00	0.00			✕	🔄

A task may contain existing children or be empty depending on the data the EY Team holds.

To add your children to this Headcount Task Select [Add Child](#)

Add Child

Please enter the child's forename and surname

Forename

Surname

[Cancel](#) [Next](#)

Complete the relevant fields with the child's Legal Forename and Surname and select [Next](#)

You will then be taken to the screen below where you can record additional information for the child such as

- Child's middle name
- Gender
- DOB
- Ethnicity
- First Language
- 30 Hours Eligibility Code
- Address

Add Child

Forename *

Middle Name

Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy)

Ethnicity *

First Language *

30 Hours 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 *

[Find Address](#) [Enter Address Manually](#)

* Required field

[Cancel](#) [Save](#)


If the parent refuses to provide you with the child's ethnicity or first language, please select the 'Refused' option.

If you are unable to find the child's address after typing in the child's postcode and clicking [Find Address](#), click [Enter Address Manually](#) and that will let you record the child's address. You will probably need to enter the address manually if you are searching for an address outside of Bolton as we only have our LA addresses on the system.

Once you have filled in the child's details, click [Save](#) and you be taken back to your headcount.




Note: Keep repeating this process until you have added all relevant children.

To add the hours against the children in the list select [Edit Headcount](#). As you can see there are some columns that are greyed out and are unable to have hours added against them.

You will only be able to add Universal Hours for a child that is eligible for 2 Year Old Funding. You can tell whether we know if a child is eligible because they will have the **N** symbol next to their name if do not have it recorded on our system. To resolve this, **contact our family's Information Service team** and they will look into it for you. Their details can be found on the [Contact Us](#) page of the Provider Portal. If they agree the child is eligible then the symbol will change to a  and will allow you to record universal hours for that child.

You will only be able to claim the extended hours for children that have **EH** next to their name. For them to have an **EH** next to their name you need to complete an 30 Hours eligibility validation check for them and link the child to your headcount. If you have already completed a check for the child and the symbol is still not there it is because you need to link them. For information on how to link children please see **the Provider Portal 30 Hours Guidance on the EYE under the [Provider Portal User Guides](#) Section.**

The other icons that can be seen in the screenshot below are **P** which means the child is eligible for Pupil Premium and **S** which means that the child is registered at more than 1 setting and are claiming shared funding.


 Edit - Headcount (Actual) for 2, 3 & 4 year olds Status: Submitted Deadline: 31 August 2017										
Blathers Nursery / Blathers Nursery / Autumn Term 2017 (01 Sep 17 - 31 Dec 17)										
Legal Name	Funding	Start Date	End Date	Weeks Attended for term (Spring Term Max = 11 Weeks)	Average Hours Attended per Week	Hours Attended for Term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
				112.00	165.00	1970.00	110.00	1330.00	25.00	240.00
Fred Bolton		01/01/2016		0.00	0.00	0.00	0.00	0.00		
Eric Cartman	EH	08/04/2017		14.00	20.00	280.00	15.00	210.00	5.00	70.00
Fred Gotightly	P EH	29/03/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Amelie Haslam	2	01/03/2017		14.00	20.00	280.00	15.00	210.00		
Ted Jones	EH	08/04/2017	30/09/2017	4.00	20.00	80.00	15.00	60.00	5.00	20.00
		01/10/2017		10.00	35.00	350.00	15.00	150.00	15.00	150.00
Lucie Knight	2	04/04/2017		14.00	10.00	140.00	10.00	140.00		
John Miller		08/04/2017		14.00	15.00	210.00	15.00	210.00		
Tony Newstart	N	27/03/2017		14.00	15.00	210.00				
Newt Newtest	N	21/04/2017		0.00	0.00	0.00				

The table below explains this in more detail.

<u>Legal Name</u>	<u>Start date</u>	<u>End Date</u>	<u>Weeks Attended for term</u>	<u>Total Hours Attended per week</u>	<u>Total Hours Attended for term</u>	<u>Universal Hours Claimed per week</u>	<u>Universal Hours Claimed for term</u>	<u>Extended Hours Claimed Per Week</u>	<u>Extended Hours Claimed for term</u>
Childs full Name	The date the child started (Not the term start date)	Date the child left (Not the term end date)	Total amount of weeks the child has attended the setting this term	Total hours child spends at the setting per week (Including funded and non-funded hours)	Total hours child spends at the setting in the term (Including funded and non-funded hours)	Total Universal hours claiming for per week	Total Universal hours claiming for the term	Total Extended hours claiming for the term	Total Extended hours claiming for the term

Complete the hours in the field starting with the weeks attended for term and then Total Hours Attended per week. When you click into the next number field the rest will be self populated based on the financial details stored in the Early Years system. This allows you to leave them if they are correct, or reduce them if the child is claiming less hours.

Please note: if you are just claiming extended hours for a child, you will need to move them over from the universal hours claimed to the extended hours claimed and leave the universal hours as 0.

Select  once you have completed your headcount.

Important Note:

If you enter details for a child and they do not start, please DO NOT overwrite/replace there details with a new child that has. You will need to enter 0 weeks and 0 hours for the child that did not start and end date the child with the same start date. Then add the new child as a 'New Child'.

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](#) and [Yes](#) on the confirmation screen.

Submit Headcount ✕

? Are you sure you wish to submit this information?

[No](#) [Yes](#)

✓ Attendance submitted successfully !

Note: You can continue to add children and hours to this list and resubmit until the deadline date. After which the Task becomes read only.

SECTION 6 – DOWNLOAD HEADCOUNT

After you have you have submitted the headcount you may want to download a copy for yourself.

Click on 'Download' button

[Download](#)

and an excel version of the headcount will be available for you to keep for your records.

1	Provider														
2	Dave's Daycare														
3															
4	Service														
5	Dave's Full daycare														
6															
7	Funding P	Financial \	Funding P	Funding Period	End Date										
8	Autumn T	2015	#####	#####											
9															
10	Forename	Surname	Date of bi	Funding A	Start Date	End Date	Weeks At	Total Hou	Hours Att	Hours Clai	Hours Clai	No In Use			
11	Stewart	Griffin	#####	2	#####			0				No			
12	Dave	Provider	#####	2	#####		11	18.18	200	15	165	No			
13	Sally	Susan	#####	3	#####		12	30	360	15	180	No			
14	Tommy	Town	#####	3	#####		12	10.3	123.6	10.3	123.6	No			
15															

SECTION 7 – AMENDMENT REQUEST

Once you have submitted a headcount, you are still allowed to edit it and re-submit it up to the deadline date. After the deadline has past, you will need to contact the finance team and ask for an amendment task to be sent to you.



**Headcount (Amendment) for Autumn Term
2015 for 2 year olds, 3 year olds, 4 year
olds is required**

Dave's Daycare - Dave's Full daycare

**Unsubmitted,
Due on 15 January
2016**

Click on the task to open it and you will see an empty headcount form.

Headcount (Amendment) for 2, 3 & 4 year olds
Status: Unsubmitted Deadline: 16 March 2016

Diddy Daycare/ / Diddy Daycare/ / Spring Term 2015 (01 Jan 16 - 31 Mar 16)

• You can edit and re-submit this information at any time until the deadline of 16 March 2016. X

Add Child
Edit Headcount
Download

Forename	Surname	Date of birth	Funding Age	Start Date	End Date	*DO NOT USE*	Weeks Attended for term (Spring Term Max = 11 Weeks)	Total Hours Attended per Week	Hours Attended for Term	Hours Claimed per Week	Hours Claimed for Term

Submit

To add a child from your actual headcount, click on add child and enter their name with the exact same spelling as it is in the actual task you submitted.

Add Child

Please enter the child's forename and surname

Forename

Surname

Cancel
Next

Once you click 'Next', their name will appear.

Child Found

Please select the child from the list below or add a new child if they are not listed

	Forename	Surname	Date of birth	Gender	CurrentAddress	Ethnicity	First Language
Select	Stewart	Griffin	[REDACTED]	Male	[REDACTED]	WEN	ENG

Cancel
Start Again
Add a new child

Click select if it is the same child that you submitted previously. If any details have changed, still click select and edit the child by clicking the button below.

Change Child Details

✎	Stewart	Griffin
---	---------	---------

If you need to add a new child completely, click add child and fill in the boxes as you normally would.

Once you have completed the task, click the submit button to send off your amendment task.



End of document