

Headcount User Guide

Version: 2.0

Last updated 30.12.2020

Step by step guidance in the following:

1. Accessing your headcount
2. Viewing your tasks
3. Adding a new child
4. Editing and submitting your headcount
5. Linking a child to your headcount

1. Accessing your headcount via the Provider Portal

After logging into the Provider Portal, you will see the services that you have access to. You may not see all the boxes as per the diagram below.

The screenshot displays the Bolton Council's Provider Portal (Test System) interface. At the top left is the Bolton Council logo, and at the top right is the text 'Bolton Council's Provider Portal (Test System)'. Below the header is a navigation bar with 'Home' on the left and 'PPTRAIN1' and 'Sign out' on the right. The main content area features a large heading 'Welcome to the Provider Portal' followed by the text 'Below, you will see the services available to you.' and 'The services available through the Provider Portal are:'. A list of services is provided: Headcount, 2 Year Old Eligibility Checker, 30 Hours Eligibility Code Validation Checker, Better Start Assessments, and Self Update. Below this list, there is contact information: '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'. At the bottom, there is a row of six service icons: '30 Hours Free Childcare', 'Better Start', 'Headcount', 'Self Update', 'Two Year Old Eligibility', and 'PPTRAIN1'. A red arrow points to the 'Headcount' icon.

- Select the headcount service icon.
- Headcount tasks are sent out monthly.

2. Viewing your tasks

Bolton Council Bolton Council's Provider Portal (Test System)

Home Headcount - PPTRAIN1 - Sign out

Welcome to the Provider Headcount Portal

Please select the headcount task you wish to complete. Once you have selected a task, you can add new children and the hours attended by each child. Please complete your headcount tasks by the set deadline date. If you do not submit your headcount then we will not receive it. Similarly if you amend a headcount that had already been submitted, please remember to re-submit the task otherwise we will not receive the changes you have made.

My tasks

Headcount (Actual) for Autumn Term 2019 (01 Sep 19 - 31 Dec 19) for 2 year olds, 3 year olds, 4 year olds is required
Balamory 1 - Balamory 1
Not Started, Due 7 days

My messages

Headcount Reminder
Dear Provider Your headcount Task is due in 7 days. Please make sure you complete and submit it b...
29/09/2019

View all tasks View all messages

My tasks are open tasks that are available for editing

My messages are messages sent via the portal

- To open your current task, click on the task to view.
- To review previous headcount tasks, click 'View all tasks'.

My tasks

Headcount (Actual) for Autumn Term 2019 (01 Sep 19 - 31 Dec 19) for 2 year olds, 3 year olds, 4 year olds is required
Balamory 1 - Balamory 1
Not Started, Due 7 days

View all tasks

- To view previous tasks, you can search either between specific dates or use the drop-down menu to find previous tasks by status.

My tasks

Task

For

Search

Status Historical Not started In Progress Submitted

Enter Criteria
Please enter your search criteria above then click Search.

Once you have selected the current task for editing. You will see your headcount screen, as shown below. You should see children on your headcount if you are already receiving funding for them this term.

Bolton Council Bolton Council's Provider Portal (Test System)

Home Headcount - PPTRAIN1 - Sign out

Headcount (Actual) for 2, 3 & 4 year olds Status: Unsubmitted Deadline: 08 November 2019

Balarmory 1 | Balarmory 1 | Autumn Term 2019 (01 Sep 19 - 31 Dec 19)

You can edit and re-submit this information at any time until the deadline of 08 November 2019.

Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term (Max Weeks Per Term - Spring=11, Summer=13, Autumn=14)	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
Betty	Boo		13/11/2014	4	01/09/2019		0.00	0.00	0.00	0.00	0.00		
George	Clooney	EH	12/05/2015	4	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Daise	Daydream	E	12/05/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Lil	Deville		23/04/2016	3	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Phil	Deville		23/04/2016	3	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Hagrid	Hilton	H	11/04/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Ronnie	Kray	E	11/11/2016	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Ellie	Wood	E	09/05/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		

3. Adding a new child

- To add a new child, please select the 'Add Child' button.

Bolton Council Bolton Council's Provider Portal (Test System)

Home Headcount - PPTRAIN1 - Sign out

Headcount (Actual) for 2, 3 & 4 year olds Status: Unsubmitted Deadline: 08 November 2019

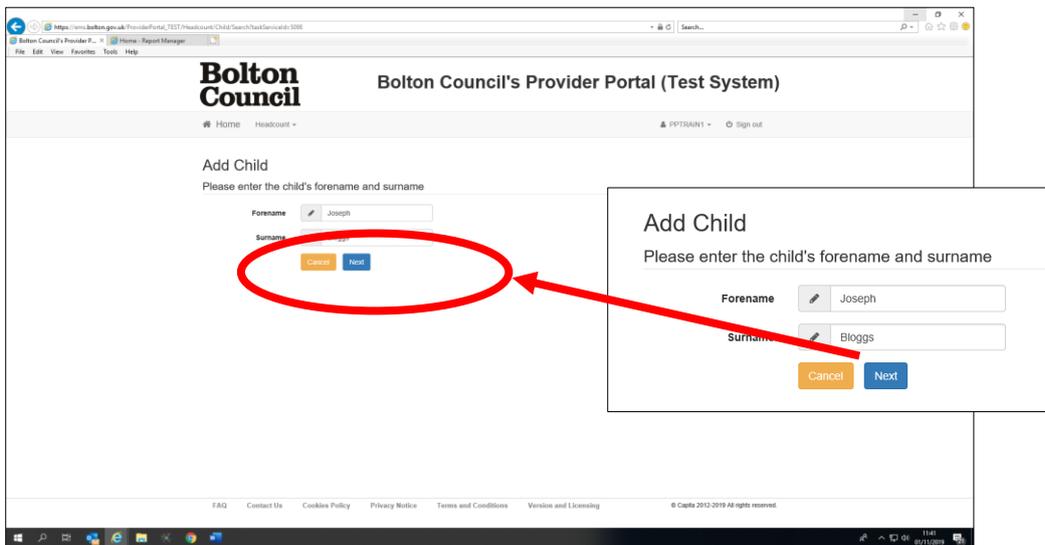
Balarmory 1 | Balarmory 1 | Autumn Term 2019 (01 Sep 19 - 31 Dec 19)

You can edit and re-submit this information at any time until the deadline of 08 November 2019.

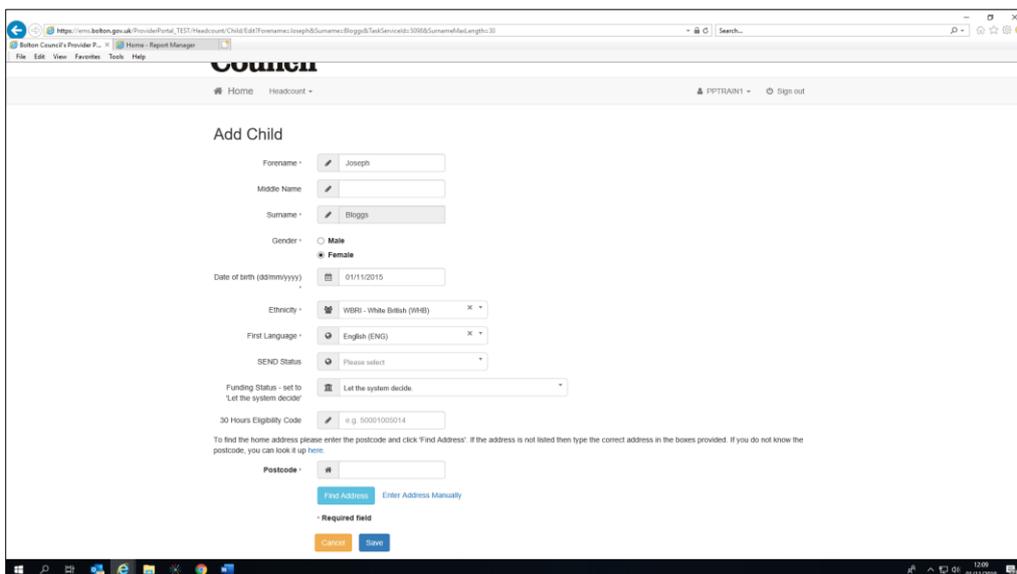
Forename	Surname	Funding	Date of birth	Funding Age	Start Date	End Date	Weeks Attended for term (Max Weeks Per Term - Spring=11, Summer=13, Autumn=14)	Average Hours Attended per Week	Hours Attended for Term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
Betty	Boo		13/11/2014	4	01/09/2019		0.00	0.00	0.00	0.00	0.00		
George	Clooney	EH	12/05/2015	4	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Daise	Daydream	E	12/05/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Lil	Deville		23/04/2016	3	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Phil	Deville		23/04/2016	3	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Hagrid	Hilton	H	11/04/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Ronnie	Kray	E	11/11/2016	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		
Ellie	Wood	E	09/05/2017	2	01/09/2019		0.00	0.00	0.00	0.00	0.00		

You can edit and re-submit this information at any time until the deadline of 08 November 2019.

- Complete the fields adding the child's personal details. Please make sure that all details are accurate; any incorrect information could result in the system not matching children. This can cause payments to be delayed or unpaid for that child, and sometimes duplicate records being created which again may delay payments.



- Enter the child's forename and surname and click 'Next'.
- Continue to complete the child's details in the fields.
 - Gender
 - DOB
 - Ethnicity
 - First Language (if known, if you do not know these details you can select 'Information Not Obtained' from the drop-down menu)
 - Address using the postcode and find address



You **do not** need to complete the fields below. The system will automatically update these fields once the headcount has been submitted and matched by our Data Management Team (you may not see the updates until the next headcount has been released).

- SEND Status
- Funding Status
- 30 Hours Eligibility Code
- Click 'Save'.

Add Child

Forename *

Middle Name

Surname *

Gender * Male
 Female

Date of birth (dd/mm/yyyy) *

Ethnicity *

First Language *

SEND Status

Funding Status - set to 'Let the system decide'

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 *

* Required field

 No need to complete these fields

- Once the child has been successfully added, you will be returned to the task screen.
- Continue to add any new children you are claiming funding for until they all appear on your screen.

4. Editing and submitting your headcount

- Once you have added all your children, you need to edit the hours and weeks you are claiming for.
- Click 'Edit Headcount'.

The screenshot shows the 'Balarmory 1 | Balarmory 1 | Autumn Term 2019 (01 Sep 19 - 31 Dec 19)' interface. A notification at the top states: 'You can edit and re-submit this information at any time until the deadline of 08 November 2019.' Below this are three buttons: 'Add Child', 'Edit Headcount', and 'Download'. A table lists children with columns for Forename, Surname, Funding Age, Start Date, End Date, Weeks Attended for term, Average Hours per Week, and various hours claimed. A red circle highlights the buttons, and a red arrow points from the 'Edit Headcount' button to the 'Weeks Attended for term' column of the table. A callout box below shows a zoomed-in view of the buttons and the deadline notice.

Forename	Surname	Funding Age	Start Date	End Date	Weeks Attended for term	Average Hours 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
Joseph	Bloggs	3	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Betty	Boo	4	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
George	Clooney	4	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Daisie	Daydream	2	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Lili	Deville	3	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Phil	Deville	3	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Hagrid	Hilton	2	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Rosie	Kray	2	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Ella	Woods	2	01/09/2019		0.00	0.00	0.00	0.00	0.00	0.00	0.00

- You can then input the weeks and hours being claimed by each child.
- Please ensure each child has the correct start date, number of weeks being claimed (if less than the maximum number of weeks available that term) and input the actual hours attended by each child even if this is in fact over their funding entitlement. Your completed screen should look like this.

 **Edit - Headcount (Actual) for 2, 3 & 4 year olds** Status: Edited but not yet submitted Deadline: 08 November 2019

Balamory 1 / Balamory 1 / Autumn Term 2019 (01 Sep 19 - 31 Dec 19)

Legal Name	Funding	Start Date	End Date	Weeks Attended for term (Max Weeks Per Term - Spring=11, Summer=13, Autumn=14)	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
				126.00	145.00	2030.00	110.00	1540.00	15.00	210.00
Joseph Bloggs		01/09/2019		14.00	15.00	210.00	15.00	210.00		
Betty Boo		01/09/2019		14.00	20.00	280.00	15.00	210.00		
George Clooney	E18	01/09/2019		14.00	30.00	420.00	15.00	210.00	15.00	210.00
Daisie Daydream	2	01/09/2019		14.00	15.00	210.00	15.00	210.00		
Lil Deville		01/09/2019		14.00	10.00	140.00	10.00	140.00		
Phil Deville		01/09/2019		14.00	10.00	140.00	10.00	140.00		
Hagrid Hilton	N	01/09/2019		14.00	15.00	210.00				
Ronnie Kray	2	01/09/2019		14.00	15.00	210.00	15.00	210.00		
Elle Woods	2	01/09/2019		14.00	15.00	210.00	15.00	210.00		

Cancel Save

- If you are unable to complete your headcount, you can click the save button and return to the headcount later to complete and submit.
- Tasks can be submitted as many times as each setting requires while the task is open. If you have made a mistake or missed a child, you can amend and resubmit.

- Input the number of 'Weeks Attended for term' and the 'Average Hours Attended Per Week'. The other fields will automatically calculate 'Hours Attended for Term', 'Universal Hours Claimed per week' and 'Extended Hours Claimed per week' EH if applicable.

Legal Name	Funding	Start Date	End Date	Weeks Attended for term (Max Weeks Per Term - Spring=11, Summer=13, Autumn=14)	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
				126.00	145.00	2030.00	110.00	1540.00	15.00	210.00
Joseph Bloggs		01/09/2019		14.00	15.00	210.00	15.00	210.00		
Betty Boo		01/09/2019		14.00	20.00	280.00	15.00	210.00		
George Clooney	EH	01/09/2019		14.00	30.00	420.00	15.00	210.00	15.00	210.00

Things to consider when inputting your headcount

- If you are unable to input the extended hours for a child entitled to 30 hours because the boxes are not showing/open in the 'Extended Hours Claimed' column, follow the steps on page 11 – 'Linking a child to your headcount'
- If you know the child is linked to the headcount and the boxes are open:
 - Check the 'Average Hours Attended' figure is higher than 15, as the system will automatically default the hours into the universal column.
 - If the child is attending your setting for 15 hours or less, and they are sharing their funding with another setting - the parent may have disclosed they want you to claim the 'Extended Hours' - please ensure the hours have not defaulted into the Universal Hours column. If this has happened, manually input zero hours in the 'Universal Hours' column and manually enter the number of hours in the 'Extended Hours' column.
 - If you are still unable to input data, please contact Early Years Finance or Families Information.

- You may see specific icons in the funding column next to each child. By hovering over each icon, the system will give a brief description of the icon and funding entitlement.

- EH shows the child is eligible for 30 hours. A **red EH** (as shown) means the child's code has expired and the child is in their Grace Period. Parents need to reconfirm their details immediately or risk losing funding. If the **EH** is amber, the child's code is about to expire and parents need to reconfirm their codes. If the **EH** is green, this means the 30 hours are eligible for the term you are claiming.
- A green **2** will appear next to a child that has two-year-old funding or has previously had two-year funding.
- The blue **N** will appear next to a child that has had a negative two-year-old check.
- You may also see a **P** icon in the funding column - this is for children eligible for EY Pupil Premium.

Legal Name	Funding
Joseph Bloggs	
Betty Boo	
George Clooney	EH
Daisie Daydream	2
Lil Deville	
Phil Deville	
Hagrid Hilton	N
Ronnie Kray	2
Elle Woods	2

5. Linking a child to your headcount

- To link a child's 30 hours to your headcount, select 30 Hours Free Childcare from the portal icons and 'Run a New 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 30 Hours Free Childcare. 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.

If no results found, click **Child not Found**, then click ok to confirm you want to **Add a new child**

Child forename *	Child surname *	Child date of birth *	Parent NI number *	30 Hours Eligibility Code *
<input type="text" value="for example John"/>	<input type="text" value="for example Smith"/>	<input type="text" value="for example 30/11/2012"/>	<input type="text" value="for example NM123456C"/>	<input type="text" value="for example 5000100501"/>

- Type in the child's forename and surname. If a check has been done previously, the child's details should appear below the boxes - click on the child's details and the text will be highlighted.
- The child's details will appear in the boxes.
- Input the Parent NI number and the 30 Hours Eligibility Code if these aren't showing in the boxes.
- Click 'Run check'.
- If a check hasn't been done previously, and the name doesn't appear under the boxes, you will see a 'Child not found' message.
- Select 'Child not found' and input the details into the remaining boxes.
- 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 30 Hours Free Childcare. 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.

If no results found, click **Child not Found**, then click ok to confirm you want to **Add a new child**

Child forename *	Child surname *	Child date of birth *	Parent NI number *	30 Hours Eligibility Code *
<input type="text" value="Joe"/>	<input type="text" value="Bloggs"/>	<input type="text" value="for example 30/11/2012"/>	<input type="text" value="for example NM123456C"/>	<input type="text" value="for example 5000100501"/>

No results

- Refresh your page Ctrl and F5 key or log out of the 30 hours service and back into your headcount. This should have linked the child and opened the 'Extended Hours Claimed' fields.
- If you are still unable to input data, please contact Early Years Finance on 01204 337169 or Families Information on 01204 332170.