

# Early Years Establishment Portal Guide

(April 2021)

## Contents

Glossary .....	2
Accessing the Establishment Portal .....	3
Registering / Logging in for the first time .....	4
Logging in as an existing user .....	5
Resetting your Password .....	6
Logging Out.....	8
Dashboard.....	8
Early Years Menu.....	9
Early Years Sub Menus.....	9
Live Register .....	10
Adding a child to your Live Register .....	11
Adding a child's Parent/Guardian .....	12
How to check a 2 year old code .....	13
30 Hours.....	14
How to add Attendance Details .....	16
Categories.....	17
Amending a child's details on your live register.....	18
Mid Term Starters.....	18
Removing a Child from your Live Register .....	19
Submissions (Headcounts and Census) .....	20
Estimates .....	23
Key Dates.....	25
Reports.....	26
Running a Report.....	27
Provider Details .....	28
Staff Details.....	29
Adding a member of staff .....	30
Removing a staff member .....	33

## Glossary

<b>Additional Hours</b>	hours that a child attends your setting that are paid for privately by the parent
<b>DAF</b>	Disability Access Fund
<b>DfE</b>	Department for Education
<b>DLA</b>	Disability Living Allowance
<b>ECS Checker</b>	The Eligibility Checking System belongs to the Department for Education (DfE). The ECS checks information from the Department for Work and Pensions (DWP), the Home Office (HO) and Her Majesty's Revenue and Customs (HMRC) to confirm if a child/family is eligible for the Two Year Old funding, 30 Hours extended entitlement, EYPP and Free School Meals.
<b>EYE</b>	Early Years Entitlement (formerly Free Entitlement)
<b>EYPP</b>	See <b>Early Years Pupil Premium</b>
<b>EYPS</b>	Early Years Professional Status
<b>EYTS</b>	Early Years Teacher Status
<b>Early Years Census</b>	a declaration about your setting that Wiltshire Council has a statutory duty to submit to the Department for Education (DfE) every January
<b>Early Years Pupil Premium</b>	additional government funding to support disadvantaged 3 and 4 year olds receiving universal entitlement hours
<b>Eligible 2 Year Old</b>	a child who has applied for and had funding approved for early years entitlement hours
<b>Estimated Headcount</b>	an approximated headcount submitted at the start of a funded period in order to calculate the first monthly payments for the period .
<b>Extended Entitlement hours</b>	hours claimed by 3 and 4 year olds who are eligible for 30 hours childcare
<b>Grace Period</b>	a short period of time after a 30 Hours Code has expired where a child can still claim extended hours at an existing provider
<b>Graduate Lead</b>	member of staff leading on Learning and Curriculum Development
<b>HMRC</b>	Her Majesty's Revenue and Customs – government body who assess 30 hours eligibility and award 30 hours codes
<b>Headcount</b>	a list of 2, 3 and 4 year old children claiming funded hours. Submitted three times a year
<b>Live Register</b>	a record of all children attending your setting of any pre-school age child
<b>Maintained School</b>	a school run by a local authority
<b>Mid Term Change</b>	A change for a child who has left or started after the headcount week but before the end of the funding period.
<b>NASS</b>	National Asylum Seeker Service number
<b>NINO</b>	National Insurance Number
<b>Nil Return</b>	a headcount submitted with zero 2, 3 or 4 year olds attending
<b>QTS</b>	Qualified Teacher Status

<b>SEN</b>	See <b>SEND</b>
<b>SEND</b>	Special Educational Needs and Disability
<b>Setting</b>	another word to describe a provider
<b>Submission</b>	another word for headcount
<b>Submission Wizard</b>	a step-by-step process to enable you to submit your estimate, headcount and / or census
<b>Submitted Census</b>	a record of your submitted census and cannot be amended
<b>Submitted Headcount</b>	this is a record of your submitted headcount and cannot be amended without the submission of a Mid Term Changes Form. It also displays the status of each child within the headcount
<b>Term</b>	a period in the academic year divided into 3 lengths (Sept-Dec, Jan-Mar, Apr-Aug)
<b>Total staff</b>	the number of people working at the whole of the establishment and not just the early years part
<b>Type of Care</b>	describes the type of day-care registered, e.g. full day or sessional care etc.
<b>Type of Provision</b>	the category or sector your setting belongs to, e.g. Childminder Sector, Private Sector etc.
<b>Universal Entitlement hours</b>	hours claimed by qualifying 2 year olds and all 3 and 4 year olds
<b>Validity Start and End Date</b>	a period allocated to a 30 hours code during which a child can claim extended hours
<b>Zero-claiming</b>	a child who attends your setting but does not claim any funded hours

## Accessing the Establishment Portal

The Establishment Portal is available online through a secure web page. Click the link below or paste it into your web browser.

<https://establishmentportal.wiltshire.gov.uk/web/portal/pages/home>

## Registering / Logging in for the first time

[Back to contents](#)

Before you can access the Establishment Portal for the **first** time, you must register as a 'New user'. Click the 'Register for a new account' button on the far right of the screen.



## Secure login - step 1

**New to Establishment Portal?** Register for an account on the right.

**Already using Establishment Portal?** Sign in below.

The image shows a login form with two main sections. On the left, under "Existing users", there are input fields for "Email" and "Password". Below these fields is a note: "For additional security, we will confirm your account by sending an authentication code to your email address." At the bottom of this section are buttons for "Sign in", "Cancel", and "Forgotten password?". On the right, under "New users", there is a text prompt: "If you're new to Establishment Portal, sign up for an account here". Below this prompt is a button labeled "Register for new account". A red arrow points from the text in the first paragraph to this button.

Then add your name and click 'Next'.



## Register a new account - step 1

The image shows a registration form with two input fields: "Forename" and "Surname". Below the form are two buttons: "Next" and "Cancel".

Then put in your email address. Please note that this must be the same email address that the EYE team use to communicate funding information to you.

You must also choose a password that meets the described level of protection. Once chosen, click 'Next'.

## Register a new account - step 2

Email address

Password

Confirm password

Password policy

Your password must meet the following requirements:

- It must be at least 8 characters long
- It must contain at least one letter
- It must contain only letters, digits, and the following special characters: !@#\$%&\*

The Establishment Portal will then send you a 8-digit code to your registered email address. On registering for the first time in the Establishment Portal, this 8 digit verification code will probably go into your Junk/Spam inbox instead of main inbox and will come from the following email address - [donotreply@liquidlogic.co.uk](mailto:donotreply@liquidlogic.co.uk).

Thereafter, verification code emails should go into your main inbox each time you start the log in process for the portal. You need to input the code once received and click 'Next'.

## Register a new account - step 3

We have just sent you an email to confirm your email address. Please enter the code this contains below. Hit back if you would like to change your email address and try again.

If you can't find this email, it may be in your spam/junk email folder.

Code

Your registration is complete. Click 'Finish' to be taken to the Dashboard.

## Logging in as an existing user

Once registered, you can log in whenever you need to by following these steps:

Secure Login – Step 1 - Enter your registered email address and password. Then click 'Sign In'.

## Secure login - step 1

**New to Establishment Portal?** Register for an account on the right.

**Already using Establishment Portal?** Sign in below.

Existing users

Email

Password

For additional security, we will confirm your account by sending an authentication code to your email address.

[Forgotten password?](#)

Secure Login – Step 2 - Enter the authentication code sent to your email address. Then click 'Finish'.

In addition to your password, an authentication code will be sent to your email address. Step 2 needs to be carried out within 10 minutes of receiving the emailed code.

## Secure login - step 2

We have just sent you an email to confirm your account. Please enter the code this contains below.  
If you can't find this email, it may be in your spam/junk email folder.

Code

## Resetting your Password

If you have forgotten your password, you can click 'Forgotten Password'.

Reset Password – Step 1 Simply enter your email address and click 'Next'.

## Reset password - step 1

Email

Reset Password – Step 2 - A verification code will be emailed which you need to enter. The click 'Next'.

## Reset password - step 2

We have just sent you an email to confirm your email address. Please enter the code this contains below.  
If you can't find this email, it may be in your Spam/Junk Email Folder.

Code

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

Reset Password – Step 3 – Create a new password and click 'Finish'.

## Reset password - step 3

Please enter your new password

Your new password

Confirm password

[Finish](#) [Cancel](#)

Click OK to return to the login page.

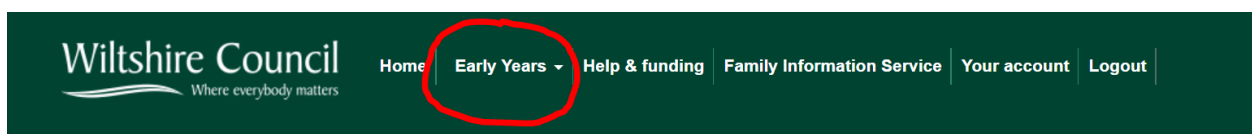
## Password Reset Confirmation

Your password has been changed. Press OK to return to the login page.

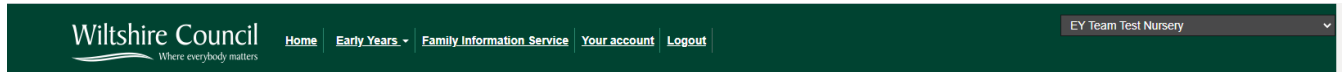
[OK](#)

If you have more than one provision to look after who uses the same email address, you only need to register once. Ensure that you are at the current provider's Dashboard before selecting the next provider to open.

You can do this by clicking on the downwards arrow next to Early Years at the very top of the page and selecting 'Dashboard' from the list.



Next, you can use the little drop-down arrow next to the provider name to switch between accounts on the right hand-side of the screen (please be patient when waiting for the account to switch – the system is making a lot of background changes).



## Logging Out

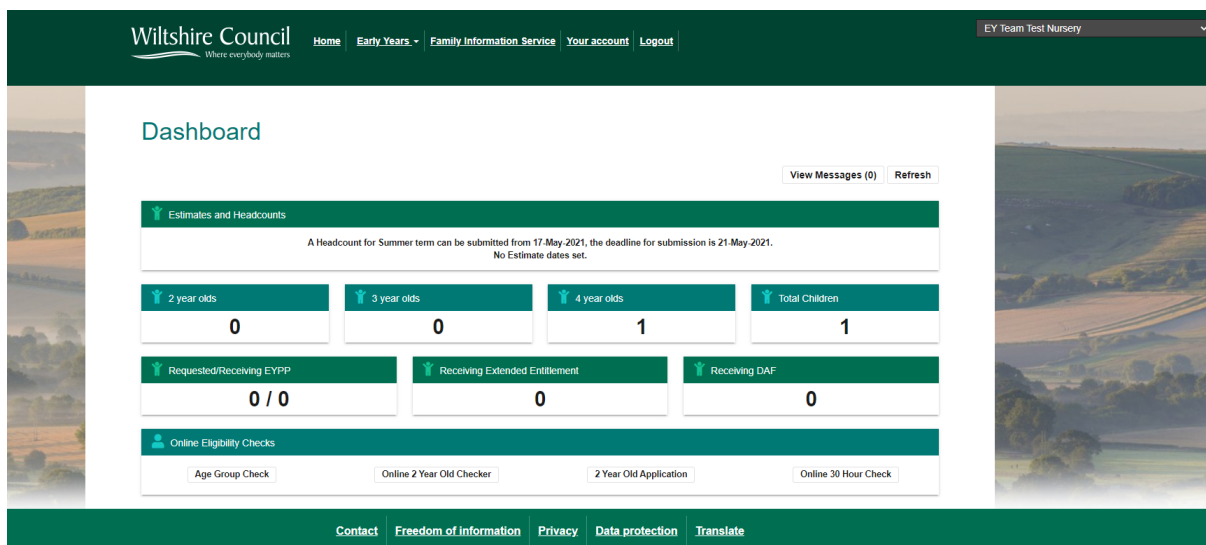
[Back to contents](#)

To log out of the system, either close your webpage or click 'Log Out'.

If there is no activity for longer than 60 minutes, you will automatically be logged out.

## Dashboard

The Dashboard is your landing page. From here you can navigate to all sections of the Establishment Portal, including your Live Register. The buttons titled '2 year olds', '3 year olds' and '4 year olds' act as 'filters' to take you just to these aged children within the Live Register



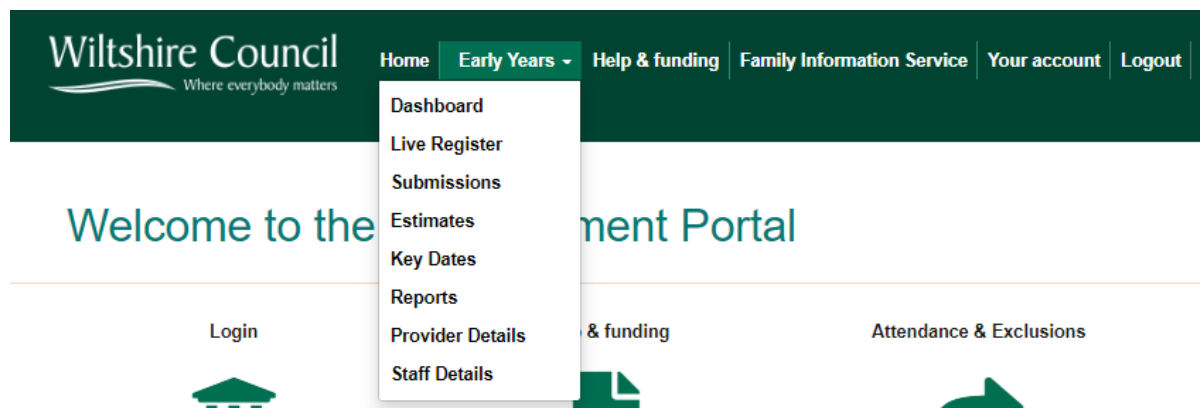
[Back to contents](#)



## Early Years Menu

[Back to contents](#)

Every function of the Provider Portal is available under the Early Years Menu. Clicking on the little arrow next to it will reveal a list of sub menus:



## Early Years Sub Menus

- **Dashboard** – your landing page
- **Live Register** – where you keep a list of all your children
- **Submissions** – where you can submit and review your termly headcounts, midterm claims and early years census
- **Estimates** – where you can submit and review your termly estimated headcounts
- **Key Dates** – a handy calendar
- **Reports** – useful reports about 30 hours codes as well as the ability to extract your submitted information so you can analyse them in spreadsheets
- **Provider Details** – all about your provision
- **Staff Details** – all about the members of staff who work or volunteer for you

*\*There are several other main menus available for additional services which will become active in future upgrades. \**

## Live Register

[Back to contents](#)

The Live Register can be accessed either by selecting 'Live Register' from the Early Years Sub Menu or by clicking on one of the age ranges on the Dashboard.

The screenshot shows the Wiltshire Council dashboard. At the top, there is a navigation bar with 'Home', 'Early Years', 'Help & funding', 'Family Information Service', 'Your account', and 'Logout'. The 'Early Years' menu is open, and 'Live Register' is highlighted with a red circle. Below the navigation bar, the dashboard title 'Dashboard' is visible. There are several data cards: 'Estimates and Headcounts' with a note 'No Estimate dates set. A Headcount for Autumn term can be submitted from 04-Nov-2020, the deadline for submission is 10-Nov-2020.', '2 year olds' (0), '3 year olds' (1), '4 year olds' (0), and 'Total Ch'. Below these are cards for 'Requested/Receiving EYPP' (0 / 0), 'Receiving Extended Entitlement' (0), and 'Receiving DAF' (0). A red arrow points from the 'Live Register' menu item to the '4 year olds' card.

The Live Register is the place to record all children attending your provision. It will be used as the basis for your headcount and early years census so be sure that it's kept up-to-date and it includes both funded and non-funded 2, 3 and 4 year olds at your provision. (Having the record of non-funded children will assist with completing the annual census, please note that the information held on the live register is NOT automatically shared with the council).

Next to each of the headings in the Live Register is a sorting tool which you can use to change the order in which the children are displayed (e.g. alphabetically by name or by age). Click on the heading to change the order. The order currently selected is shown with a small black arrow next to it.

The screenshot shows a table for 'Glitter-Bug's Nursery'. The table has the following columns: Name, Gender, Date Of Birth, Days Per Week, and Additional Hours. The 'Gender' column has a small black arrow next to the header, indicating it is the current sort order. A red arrow points to the 'Gender' header.

Name	Gender	Date Of Birth	Days Per Week	Additional Hours
[REDACTED]	M	28-Dec-2016	5	10.0

## Adding a child to your Live Register

You have a choice to add a child to your register if they are in attendance now or record details of children if they are due to start with you in the future (to do this, select 'Future Starters').

### Early Years

#### Live Register

All fields with \* are mandatory questions which require an answer before being able to progress. Please take care when adding any child/funding details into your Live Register as mistakes can sometimes be difficult to amend.

Please remember to key the full, legal name for the child and NOT any abbreviation or casual name that you may know the child as.

When adding dates into the portal:

- Use the calendar icon whenever shown to select a date;
- Where typing a date manually, only use back slashes, i.e. 01/09/2020
- Where typing a date manually, only use a full date, i.e. 01/09/2020, not 01/09/20 or 1/9/20.

When adding an address to a child's record, if you cannot find the address you need in the list provided, please contact the Early Years Entitlement Team by email: [earlyyears@wiltshire.gov.uk](mailto:earlyyears@wiltshire.gov.uk).

If the form doesn't appear to process the new child's details it will be because not all the mandatory fields have been completed. Scroll back up to see if there are any fields highlighted in red complete these and then select 'OK/Save'.

If you wish to record the details of children who are yet to join, select 'Future Starters'. Children are stored away from the main Live Register but the record can be edited, deleted or accepted onto the Register when they start attending. The edit funding details section will only be available once you accept the child onto the Live Register. You'll receive an alert on the dashboard to notify you when children are due to join.

Once the child's details have been correctly recorded and added to your Live Register, you will be asked to 'Edit Funding Details'

Edit Funding Details

You can begin to enter the parent/guardian details, 2 year old code check, 3 and 4 year old code check and Attendance Details

(Some 2 year olds are eligible to access funded hours, their parent/guardian needs to apply for this through the Parent Portal

<https://parentportal.wiltshire.gov.uk/web/portal/pages/home>. If eligible the system will generate a reference number to give to their chosen Early Years Provider.

Similarly, the parent/guardian will be provided with a 30 hours code by HMRC if eligible for the extended entitlement.)

[Back to contents](#)

## Adding a child's Parent/Guardian

Select 'Add Parent/Guardian' and begin completing all relevant fields. This is where you can record whether the Parent/Guardian has consented to an EYPP check.

Parent/Guardian Details
✕

Forename *	
Surname *	
Contact Number	
Date Of Birth	dd-mm-yyyy

NI Number ?	
NA SS Number ?	
<input type="checkbox"/> Consent to EYPP check	
30 hour code	

NB the parent's Date of Birth is required for EYPP checks only.

## How to check a 2 year old code

[Back to contents](#)

There is an Online 2 Year Old Checker on the Dashboard. If the code is eligible, you will be given the opportunity to add the child directly onto the Live Register.

### 2 Year Eligibility Checker

✓ Ref: "VO-JOWN-2GU0" - Found and Eligible

Does the Parent / Guardian have a 2 YR Reference Number from Wiltshire Local Authority?  Yes  No

Out of Authority Child  Yes  No

Enter the reference number, date that proof of eligibility was seen, and child details below (all fields MUST be filled in).

Reference No. <sup>?</sup> *	VO-JOWN-2GU0
Child's Forename *	[REDACTED]
Child's Surname *	[REDACTED]
Child's Date Of Birth *	[REDACTED]
Proof Seen <sup>?</sup> *	02-04-2021

By clicking 'Check Eligibility' below a check will be carried out to validate the above details

NB: For this check to work, the child's forename (including any middle name), Surname and Date of Birth must match that given by the parent at the time of their application. Also, please watch out for characters which could be interpreted as either a letter or digit eg O and 0, I and 1.

If a child is already included on your Live Register, you can carry out the eligibility check within the child's record by selecting 'Check 2 Year Old Code'.

### Two Year Old Application Details

There is no record of a successful application for 2 year old funded hours for this child. If they are eligible to claim funded hours, then please:

Does the Parent / Guardian have a 2 YR Reference Number from Wiltshire Local Authority?  Yes  No

Out of Authority Child  Yes  No

Enter the reference number and date that proof of eligibility was seen below (all fields MUST be filled in).

Reference No. <sup>?</sup> *	<input type="text"/>
Proof Seen <sup>?</sup> *	<input type="text" value="dd-mm-yyyy"/>

By clicking Save below a check will be carried out to validate the above details

For parents with an 'old style' Wiltshire Council 2 year old funding code (4 or 5 digits), please select that the child is 'out of authority' and enter the code in the Local Authority' field.

**Two Year Old Application Details** ✕

There is no record of a successful application for 2 year old funded hours for this child. If they are eligible to claim funded hours, then please:

Does the Parent / Guardian have a 2 YR Reference Number from Wiltshire Local Authority?  Yes  No

**Out of Authority Child**  Yes  No

Enter the local authority and date that proof of eligibility was seen below (all fields MUST be filled in).

Local Authority \*

Proof Seen \*

By clicking Save below, you are now able to enter 2 Year Old Funded Hours, Please ensure all relevant eligibility proof/documentation are attached for submission purposes

Depending on the child's eligibility you will receive a message. Example below is for an eligible applicant:

**Two Year Old Application**

The child is either 2 years old this term, or will be 2 years old next term.  
 Child is eligible for 2 year old funding.  
 Two Year Old Ref No: VO-JOWN-2GU0, Proof Seen: 02-Apr-2021

## 30 Hours

Before offering any extended hours, you must first check you have a valid 30 hours code from the child's parent. To run a quick check on a code, there is a Check facility on the Dashboard. This will give you a quick result and if it's a successful check, you will be given the option to add the child directly to your Live Register. To run the check, you will need the child's date of birth, either the parent's the NI or NASS number, whichever is relevant, and the code and written consent to authorise

the check from the parent:

If you choose not to use the Dashboard checker, and you wish to claim Extended hours, you'll need to add the parent/guardian information to the child's record on the Live Register and record that you have consent to run the check:

**Possible outcomes are:**

**Eligible** – the code is valid, and you can offer Extended Entitlement hours

**Grace Period** – the code was eligible but has fallen into its grace period. Ask the parent to reconfirm the code with Her Majesty's Revenue and Customs (HMRC) before offering Extended Entitlement hours.

**Not Eligible** – either the code has expired (i.e. the grace period has ended, and the parent has not reconfirmed their code with HMRC) or part of the data is incorrect. Check the information with the parent and try again.

## How to add Attendance Details

[Back to contents](#)

Depending on the age of the child, you will be presented with different fields to complete.

For children of age to receive the funded 2-year-old funding you will see:

Two Year Old Application

The child is either 2 years old this term, or will be 2 years old next term.  
This child is not eligible to claim 2 year funding.

Check 2 Year Old code

Attendance Details

Provider Delivery Method	<input type="text" value="Term Time Only"/>
Days Per Week	<input type="text" value="0"/>
Additional Hours	<input type="text" value="0.0"/>
2 Year Old Funded Hours Claimed	<input type="text" value="0.0"/>
Total Hours at your setting per week	<input type="text" value="0.0"/>
Proposed End Date/School Start Date	<input type="text" value="dd-mm-yyyy"/>

In the example above it will not be possible to add '2 year old Funded Hours' as the Code has not been added. The following screen shot is showing that a code has been added and approved, thereby allowing you to enter the number of hours to be claimed:

Two Year Old Application

The child is either 2 years old this term, or will be 2 years old next term.  
Eligibility Using the 'Golden Ticket' approach (you have specified a valid "Reference No./Local Authority") confirmed. Funded hours can be added.

Reference No./Local Authority	<input type="text" value="12345"/>
Proof Seen	<input type="text" value="28-10-2020"/>
Out of Authority Child	<input checked="" type="radio"/> Yes <input type="radio"/> No

Attendance Details

Provider Delivery Method	<input type="text" value="Term Time Only"/>
Days Per Week	<input type="text" value="0"/>
Additional Hours	<input type="text" value="0.0"/>
2 Year Old Funded Hours Claimed	<input type="text" value="0.0"/>
Total Hours at your setting per week	<input type="text" value="0.0"/>
Proposed End Date/School Start Date	<input type="text" value="dd-mm-yyyy"/>



For children who are of age to receive the 3 and 4 year old funding you will see the following (this example is for a child who has **not** got a 30 Hour Code logged – in this case it will not be possible to enter any number into the 'Extended Hours Claimed' field.):

**'30 Hour Funded Childcare' Check**

This child is not eligible to claim extended entitlement.

**'30 Hour Funded Childcare' Check**

---

**Attendance Details**

Provider Delivery Method	<input type="text" value="Term Time Only"/>
Days Per Week	<input type="text" value="0"/>
Additional Hours <small>?</small>	<input type="text" value="0.0"/>
Universal Hours Claimed <small>?</small>	<input type="text" value="0.0"/>
Extended Hours Claimed <small>?</small>	<input type="text" value="0.0"/>
Total Hours at your setting per week <small>?</small>	<input type="text" value="0.0"/>
Proposed End Date/School Start Date <small>?</small>	<input type="text" value="dd-mm-yyyy"/>

[Back to contents](#)

## Categories

Use this section to add tags / categories to a child, these categories can then be used to filter the Live Register. This feature is useful if you've got many children to manage, adding a room category, for instance, will allow you to filter your Live Register per room.

**Categories**

Use this section to add tags / categories to this child which can then be used to filter on in the Live Register.

Add a category ?

+ Add

Categories No categories selected

OK Cancel

Once all fields have been completed select 'ok'.

OK Cancel

The system will take you back to the Live Register confirming the child has been successfully saved.

## Amending a child's details on your live register

[Back to contents](#)

To make any changes to a child's record, simply click the small pencil icon on the right hand-side

Forename	M	01-Jul-2016	0	0.0	0.0	0.0	0.0	TTO	SMYR		
Surname											

If you see this symbol when trying to amend a child's details, then you need to go to the top of the page and click on 'Edit child details'. This will allow you to continue inputting/editing.

## Early Years

Live Register

Live Register

Use the Live Register to record all children attending your provision. It will be used as the basis for your Headcount and Early Years Census so be sure that it's kept up-to-date and it includes all the 2 (if applicable), 3 and 4-Year-Olds at your provision, even if they aren't claiming any hours.

If you wish, you can also record younger or older children on your Live Register. These will be automatically excluded from your Headcount.

[Edit Child Details](#)
[View Submission History](#)
[Save](#)
[Cancel](#)

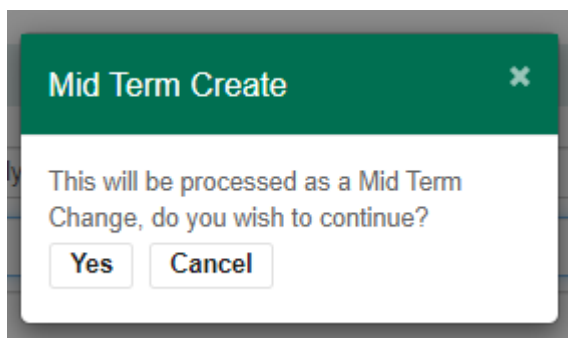
Where only a postcode is showing for a child, you will need to select an address from the list of available addresses in the drop down list.

When you have updated the record, click 'OK' to save your changes.

## Mid Term Starters

[Back to contents](#)

When you successfully add a child to your Live Register for whom you wish to make a claim for any funded hours, and you have already submitted your termly headcount, you will be asked whether you wish to make a 'Mid Term' claim for the child.



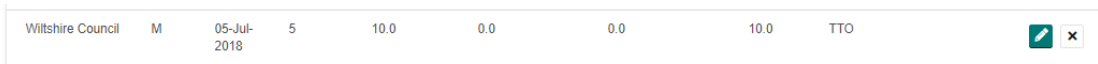
By clicking 'YES' you will trigger an automatic headcount to the Wiltshire Council requesting funding until the end of the current term. If you do not want to make a claim this term, please do NOT add the child to your Live Register until the following term.

[Back to contents](#)

## Removing a Child from your Live Register

When a child leaves your provision, you should remove them from your Live Register promptly. This cannot be done in advance of the event.


To remove a child, click the small 'x' to the right of the child's name on the Live Register.



Add in an end date (the date the child last attended) and click 'Confirm'.

**Remove Child From Register**

**Child Details**

Name	Wiltshire Council
Gender	Male
Date Of Birth	05-07-2018
Ethnicity	White - British
End Date	<input type="text" value="dd-mm-yyyy"/> 

If the child was included on your termly headcount, you will be asked two questions:

1. Has this child now left your provision?
2. Would you like to reallocate funding back to Wiltshire Council?

Question 1 is to double check you intended to remove the child from your Live Register.

Question 2 is asking whether you intend to retain (keep) or reallocate (return to the Council) the funding you have been paid for the child's funded hours. **You MUST ALWAYS reallocate the funding back to the Council for all 2, 3 and 4 year old children.**

Once you have chosen whether to reallocate the funding, click 'Remove'.

The child will now be removed from your Live Register.

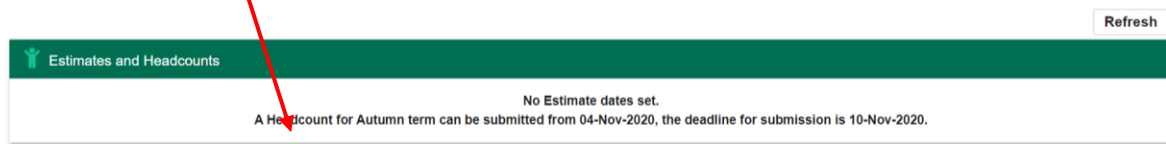
## Submissions (Headcounts and Census)

Three times a year you are required to submit a headcount of all funded 2, 3 and 4 year olds in your care. Once a year (in January) you also required to submit an early year's census. The Establishment Portal enables you to securely submit the children on your Live Register to the Wiltshire Council which triggers the processes for payment.

The submission dates of your termly headcount are available on 'Key Dates' within the portal.

You can also see that a termly headcount or estimated headcount is due from the top of the Dashboard.

### Dashboard



To begin your termly headcount, click on 'Submissions' from the Early Years Sub Menu.

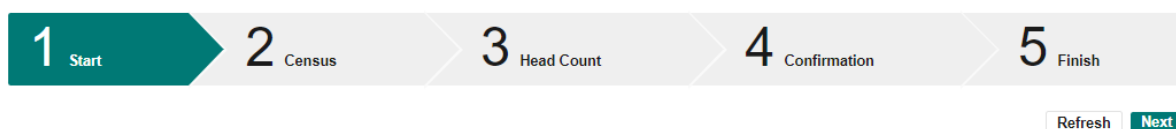


The Submissions page is made up of a 5-step wizard-style process (i.e. clicking 'next') to move you through the headcount or census to a secure submission to the Wiltshire Council. You can also see your previous headcounts and censuses on this page.

**Step 1** - To start your headcount or census, click 'Next'

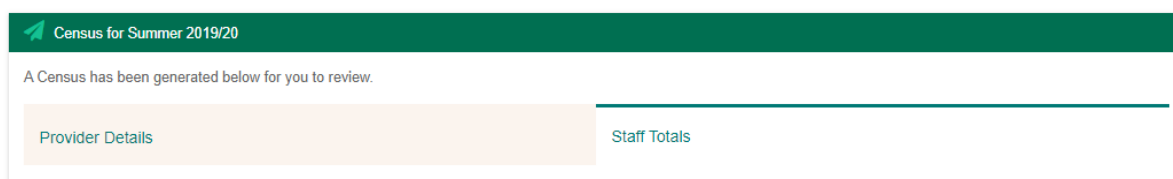
### Early Years

Submissions

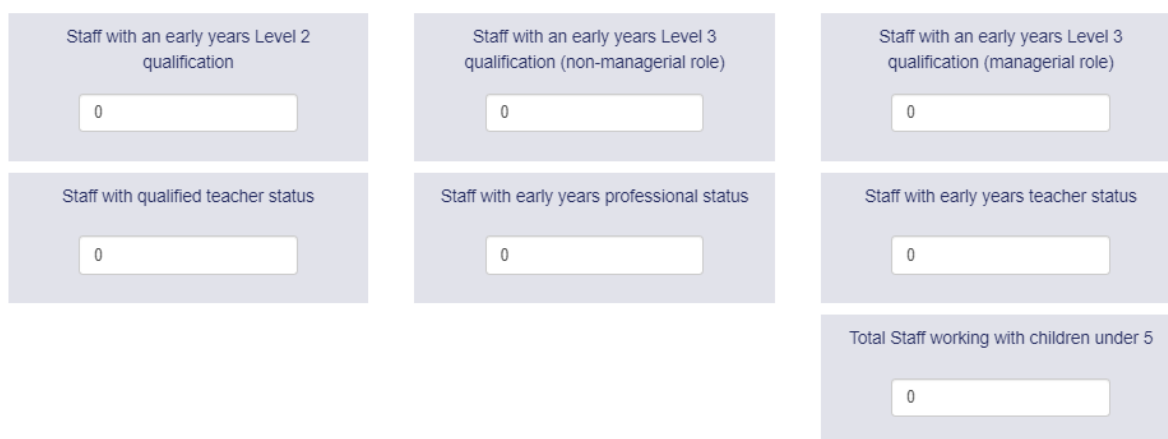


**Step 2 – Census** – if a census is due (only in January) you will be asked to confirm your Provider Details and Staff Details.

On the left tab you will see your Provider Details. This is information shared with the Wiltshire Council by Ofsted or declared when you registered as an EYE provider. Certain information you are unable to edit, if you notice any errors, please email the Early Years Entitlement team at [earlyyears@wiltshire.gov.uk](mailto:earlyyears@wiltshire.gov.uk).



On the right-hand tab, you will see a summary about the Staff working and volunteering at your provision. This table is generated from your Staff Details.



Once you have reviewed the Staff Totals, click 'Next'. Please note - If it is not a headcount taking place in January, a census will not be required.

**Step 3 – Headcount** – A summary of all claiming children will be displayed from your Live Register. Here you can make amendments to your child records if you spot an error (e.g. increase the number of hours claimed).

Please note that if you go back to your Live Register and amend any details (mid Headcount Submission) the changes to your submission will not automatically refresh – you will need to press 'Refresh' at the top of the screen once you go back to the Submission wizard.

**Step 4 – Confirmation** – On the left tab, an overview of all your claims will be shown in a tiled format for one last check prior to submission.

Head Count for Summer 2019/20

Please review the following head count details.

Summary Tiles

Total 3/4 year olds (TTO)	0	
Privately Funded 2 Year Olds	0	Privately Funded 3 Year Olds
		0
		Privately Funded 4 Year Olds
		1
Early Years Pupil Premium Children	0	
		Children claiming DAF
		0

Headcount Overview

On the right tab, an overview of the headcount in a written format is available too.

Head Count for Summer 2019/20

Please review the following head count details.

Summary Tiles

Headcount Overview

**Term Time Only**  
0 x 3/4 year olds claiming 0.0 universal hours per week.

**Other Totals**  
0 children claiming Early Years Pupil Premium.  
0 children claiming DAF.  
0 privately funded 3 year olds and 1 privately funded 4 year olds.

When you are confident the data is accurate, click 'Submit'.

## Early Years

Submissions

1  
Start

2  
Census

3  
Head Count

4  
Confirmation

5  
Finish

Click 'Return' to see your submission's status.

Term	Submission Type	Total Universal Hrs Claimed	Total Universal Hrs Approved	Total Extended Hrs Claimed	Total Extended Hrs Approved	Total Additional Hrs	EYPP Count	Submitted	By	Status
✓ Summer 2019/20	Mid Term Change	30.0	30.0	15.0	15.0	0.0	0	03-Jun-2020	charlene.fenwick@wiltshire.gov.uk	SUBMITTED
✓ Summer 2019/20	Head Count	173.0	173.0	0.0	0.0	78.0	0	02-Jun-2020	charlene.fenwick@wiltshire.gov.uk	FINALISED

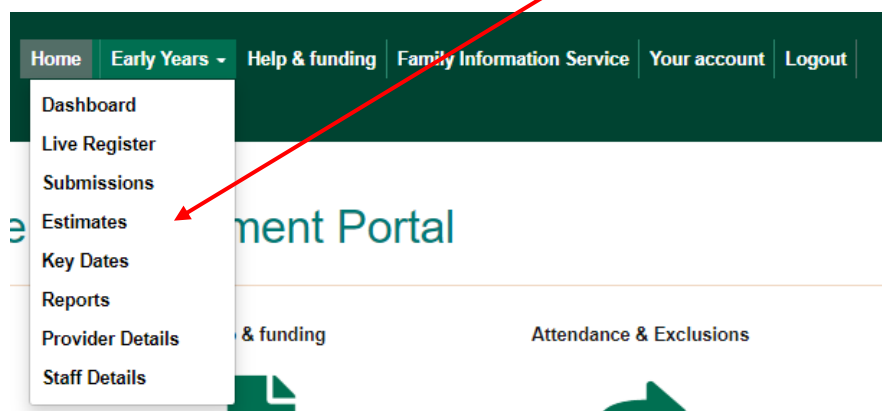
Once your headcount / census has been approved by the Wiltshire Council, this will be updated to a status of 'Finalised'. This is also where any Mid Term Starters or Leavers will also be recorded.

[Back to contents](#)

## Estimates

Three times a year you will be invited to submit an estimated headcount of all 2, 3 and 4 year olds who you think will be claiming funded hours in the following term. The Establishment Portal enables you to securely submit the estimate to the Council which triggers the processes for payment.

To begin your estimate, click on 'Estimates' from the Early Years Sub Menu.



The Estimates page is made up of a 5-step wizard-style process (the same as a headcount) to move you through the estimate to a secure submission to the Wiltshire Council. You can also see your previous estimates on this page.

**Step 1** – To start your estimate, click 'Next'.



## Step 2 – Checking your estimate.

The Provider Portal will look at any children included on your Live Register and look at their ages as if it was the next term. It will then group them by age and add up all their funded hours (universal and extended entitlement hours) per week.

Total Claimed Hours for Summer 2019/20		
Age Group	Total Children	Total Hours / Week
3	2	6.0
4	0	0.0

Of course, you may know of other children who are starting (and not yet added to your Live Register) and leaving (but not yet removed from your Live Register), so you can amend the number of children and claimed hours by clicking on the small down arrow next to each line.

Once you are happy the estimated numbers, click 'Next'.

**Step 3 – Confirmation** – This is a written list of the previous table for you to verify you have the correct number.

Once you are ready, click 'Submit'.

**Estimate Details Overview for Summer 2019/20**

Please review the following claimed hours and estimate details.  
There's a total of 2 children.

**All Year Round**  
0 x 3 year olds are not claiming any hours.  
0 x 4 year olds are not claiming any hours.

**Term Time Only**  
2 x 3 year olds are claiming 6.0 funded hours.  
0 x 4 year olds are not claiming any hours.

That's a total of 6.0 funded hours claimed.

Click 'Return' to go back to the Estimate Sub Menu page to see your submission to The Council.





[Return](#) [Next](#)

**Finished**

Thank you, your estimate has been submitted.

Once your estimate has been approved by The Council, this will be updated to a status of 'Accepted'.

Previous Estimate Submissions						
Term	Delivery	Total Hrs/Wk 2YO	Total Hrs/Wk 3YO	Total Hrs/Wk 4YO	Submitted	Outcome
Summer 2019/20	TTO	0.0 claimed	6.0 claimed	0.0 claimed	14-Jul-2020	PENDING
	TTO	0.0 approved	0.0 approved	0.0 approved		
	AYR	0.0 claimed	0.0 claimed	0.0 claimed		
	AYR	0.0 approved	0.0 approved	0.0 approved		

## Key Dates

[Back to contents](#)

To view the Key Dates, click on 'Key Dates' from the Early Years Sub Menu.

There is a calendar style event log provided for you. This allows you to see when children have started or left your provision, when 30 Hour Codes fall into their Grace Period or expires, as well as which days are funded and non-funded. The system has been initially set-up to deliver the funding over Term Time only, so you will see holidays marked as non-funded days on this calendar. If you are stretching the offer to cover holidays, please ignore these non-funded days.

**Key dates for Jul 2020 (Summer term)**

Show Non-Funded Days  Yes  No

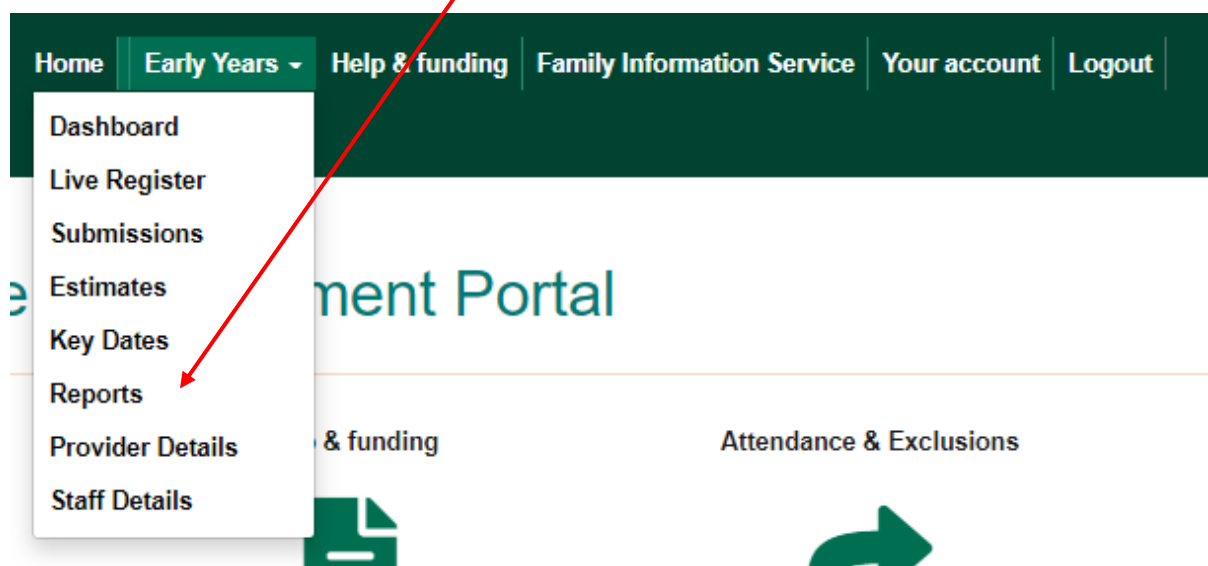
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15 <input checked="" type="checkbox"/> Estimate is due.	16	17	18	19
20	21	22	23 <input checked="" type="checkbox"/> Non-funded day (TTO)	24 <input checked="" type="checkbox"/> Non-funded day (TTO)	25 <input checked="" type="checkbox"/> Non-funded day (TTO)	26 <input checked="" type="checkbox"/> Non-funded day (TTO)
27 <input checked="" type="checkbox"/> Non-funded day (TTO)	28 <input checked="" type="checkbox"/> Non-funded day (TTO)	29 <input checked="" type="checkbox"/> Non-funded day (TTO)	30 <input checked="" type="checkbox"/> Non-funded day (TTO)	31 <input checked="" type="checkbox"/> Headcount and Census are due. <input checked="" type="checkbox"/> Non-funded day (TTO)		

You can also see when estimates, headcounts and censuses are due so you can add these dates to your personal diary.

## Reports

[Back to contents](#)

To run a report, click on 'Reports' from the Early Years Sub Menu.



The following reports are available:

## 1. Estimates Submitted

## 2. Live Register Reports:

- a. All children currently on your Live Register
- b. All children not claiming any hours
- c. All children missing ethnicity data
- d. All children who have been removed from your Live Register

## 3. Submissions

- a. Mid Term Claims
- b. Headcounts

## 4. Censuses Submitted

## 5. 30 Hours

- a. All 30 Hours Checks Performed
- b. Current 30 Hours Claims
- c. Expired 30 Hours Claims

[Back to contents](#)

## Running a Report

To run a report, simply choose the relevant report and click on the small download icon underneath it.

Get reports about children on (or previously on) your live register.

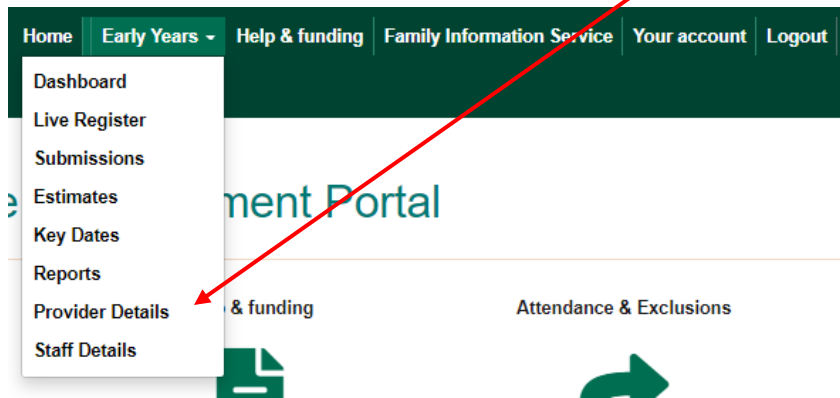
All children currently on your live register

 Live Register

This will prompt your computer to open or save the report. You can save it into your preferred format, e.g. Microsoft Excel and analyse the data outside of the Provider Portal. This is particularly useful when comparing your Live Register to other databases you may hold.

## Provider Details

To see your information, click on 'Provider Details' from the Early Years Sub Menu.



The information displayed is shared with the Wiltshire Council by Ofsted or declared when you register as an EYE Provider and cannot be edited in the Provider Portal. If you notice any errors, please contact email the Early Years Entitlement Team at [earlyyears@wiltshire.gov.uk](mailto:earlyyears@wiltshire.gov.uk).

## Provider Details

Main Details	
DfE URN	■■■■
Ofsted URN	■■■■
Ofsted Registered Name	■■■■■■■■■■
Type of Provision	
Maintained School Relationship	■
Other Establishment Partnership	■
Funding Weeks	■■
Delivery Method	■■■■■■■■
Graduate Lead on Learning and Curriculum Development	
Open 24 / 7	■

We also record the information about your opening hours here. These can be updated and need to be ready for your census each January. Your opening hours should include private and funded sessions, recording your 'opening time' as the start of the earliest session and the 'closing time' as the end of your last session'.

## Opening Times

Day	Open	Opening Time ?	Closing Time ?
Monday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Tuesday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Wednesday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Thursday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Friday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Saturday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---
Sunday	<input type="radio"/> Yes <input checked="" type="radio"/> No	---	---

## Provider Availability

- All Year Round  
 Term Time Only

We also hold contact information about you here.

**Save**

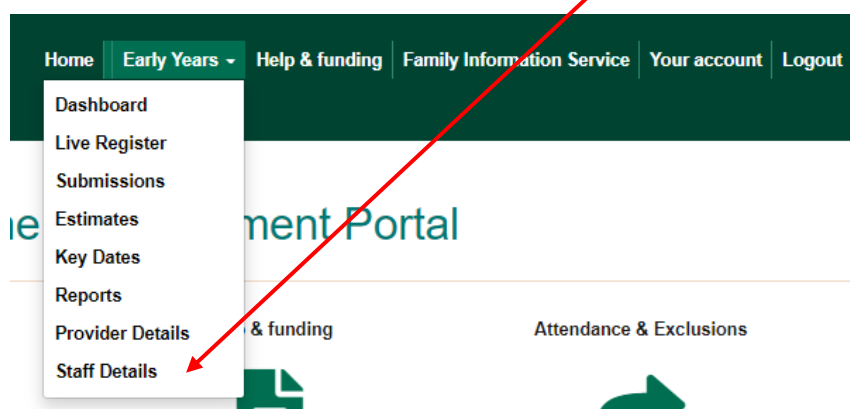
## Contact Details

<b>Ofsted Registered Address</b>	██████████ ██████████ ██████████ Wiltshire ██████████
<b>Telephone</b>	██████████
<b>Email</b>	██████████@██████████.m
<b>Website</b>	N/A

[Back to contents](#)

## Staff Details

To see your information, click on 'Staff Details' from the Early Years Sub Menu.




You are required to add all staff and volunteers here. This is because during your census, the Department for Education will 'count' your staff and all of their varying levels of qualifications.

## Adding a member of staff

[Back to contents](#)

To add a member of staff, click 'Add Staff'.

### Staff Details

 Staff Details

This page allows you to record each member of staff and all of their qualifications. The DfE requires you to report a series of statistics about your staff and their levels of qualification. These statistics are calculated based on the staff details entered on this page, though it is possible to just set or amend them when submitting your Census.

For staff who do not have contact time with any child, leave un-checked the 'Works with children aged under 5' box e.g. administrative support or kitchen staff. Additionally, you can also check staff who volunteer (e.g. parents on a reading rota). Both volunteers and staff who do not work with children aged under 5 are NOT included in the summary submitted to the DfE.

When you add a member of staff, you can include extra information about their contact details, emergency contact details and any training they have completed. This will not be returned to the DfE or your local authority and are for your records only.

You can add all qualifications a staff member holds from a drop down list from the DfE that are considered 'full and relevant'. If the qualification is not listed then you will not be able to record it. You will need to know whether the qualification was gained before or after September 2014, as this was when major changes took place to align older qualifications.

[Add Staff](#) [Summary](#)

All the fields that are mandatory are marked with an \*. The following sections **marked in green** contain data that is returned to the DfE. All other data is retained in the Establishment Portal only and is not shared by Wiltshire Council. The screen is divided into the following sections:

- **Staff details** – like name, job title, contact details and whether or not the staff member works with children under 5 or is a manager, apprentice or volunteer.
- **Staff Address** – a post code looks up system
- **Emergency Contact Details** – the name, relationship and contact number for someone to call
- **Qualifications** – a list of their current qualifications
- **Training** – a list of which training courses have been undertaken

To add the information, simply type the information in from your records.

➤ Add Staff

👤 Staff Details

Forename *	<input type="text"/>
Surname *	<input type="text"/>
Previous Surname	<input type="text"/>
Job Title *	<input type="text"/>
Email	<input type="text"/>
Phone Number	<input type="text"/>
Works with children aged under 5 *	<input type="radio"/> Yes <input type="radio"/> No
Is a Manager *	<input type="radio"/> Yes <input type="radio"/> No
Is an apprentice	<input type="radio"/> Yes <input type="radio"/> No
Is a volunteer	<input type="radio"/> Yes <input type="radio"/> No
First Day *	<input type="text" value="dd-mm-yyyy"/>
Last Day	<input type="text" value="dd-mm-yyyy"/>

🏠 Staff Address

Postcode	<input type="text"/>	<input type="button" value="🔍 Search"/>
----------	----------------------	---

👤 Emergency Contact Details

Name	<input type="text"/>
Relationship	<input type="text"/>
Phone Number	<input type="text"/>

🎓 Qualifications

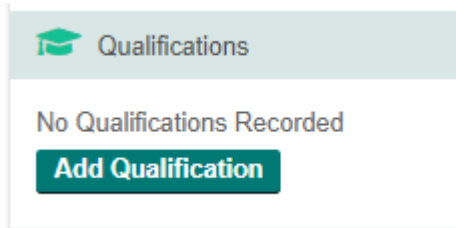
No Qualifications Recorded

📅 Training

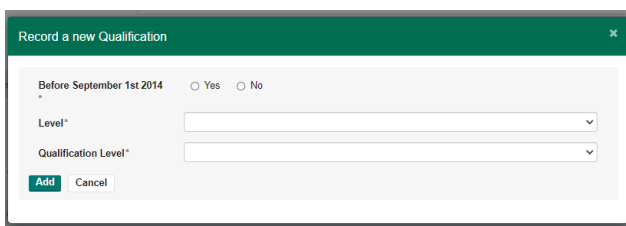
Paediatric First Aid	<input type="radio"/> Yes <input type="radio"/> No
Safeguarding	<input type="radio"/> Yes <input type="radio"/> No
Fire Marshall	<input type="radio"/> Yes <input type="radio"/> No
Manual Handling	<input type="radio"/> Yes <input type="radio"/> No
Forest School	<input type="radio"/> Yes <input type="radio"/> No

**Please note that at least 1 member of staff must be noted as a 'Manager' and at least 1 member of staff must be noted as 'Works with children under 5' or the census will not work. For Childminders, please declare yourselves as a 'manager'.**

When you reach the Qualifications section, click on 'Add Qualification'.



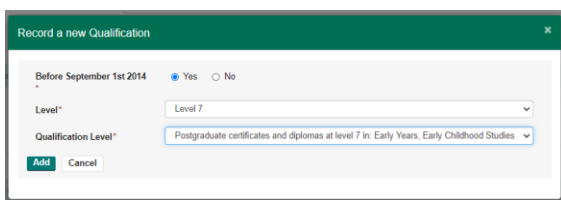
Using the staff member's original certificate, select whether the qualification was earned before 1st September 2014 by putting a dot next to 'Yes' or 'No'. This will filter a list of qualifications, so please take care not to guess.



Next, select the Level of qualification, e.g. Level 6 – Degree.

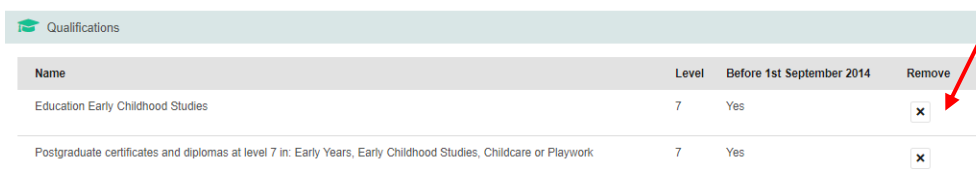
Then click the Qualification Level drop down list and select the qualification that exactly matches the title on the certificate.

Finally, click 'Add'.



Add all the staff member's qualifications. It doesn't matter the order they are added, or the levels achieved by the staff member, as the Summary will organise this for you.

If you make a mistake, you can remove the qualification by clicking the 'x' next to the mistake. The line will then be removed.



Lastly, you can indicate the training a staff member has undertaken by clicking the dot next to each type of training.



Training

Paediatric First Aid  Yes  No

Safeguarding  Yes  No

Fire Marshall  Yes  No

Manual Handling  Yes  No

Forest School  Yes  No

When you've completed all the information, click 'Save'.

The record will then be added to your Staff Details.

Staff Details			
▼ Name	Job Title	Highest Qualification	Contact Details
Staff Member	Manager	Level 7	Email Address - @hotmail.com Phone Number - 07536985214

## Removing a staff member

[Back to contents](#)

To remove a member of staff, click the pencil next to the staff member's name.

First Day\*

Last Day

You will be prompted to check this is correct, just in case you didn't mean to remove the staff member. Click 'Yes' to confirm and the staff member will be removed or click 'No' to cancel.

Confirm Save
✕

This staff member will be removed from the staff list after today.

Are you sure you want to continue?

As part of your census, a count of your staff is submitted to the DfE. To see what will be submitted, click on 'Summary'.

The details of Bob Smith have been successfully saved.

[Add Staff](#) [Summary](#)

Name	Job Title	Highest Qualification	Contact Details
Staff Member	Manager	Level 7	Email Address - @hotmail.com Phone Number - 07536985214
Bob Smith	Play Worker	Level 5	Email Address - @live.co.uk Phone Number - 07852639841

The Summary cannot be amended manually. Only the amendment of your staff will affect the figures.

### DfE Statistics - staff working with children aged under 5

<b>Total staff</b>	2
<b>Staff with a Level 2 qualification</b>	0
<b>Staff with a Level 3 qualification and no management responsibility</b>	1
<b>Staff with a Level 3 qualification and management responsibility</b>	1
<b>Staff with 'Qualified Teacher' status (QTS)</b>	0
<b>Staff with 'Early Years Professional' status (EYPS)</b>	0
<b>Staff with 'Early Years Teacher' status (EYTS)</b>	0

22 April 2021