



REFERENCE GUIDE:

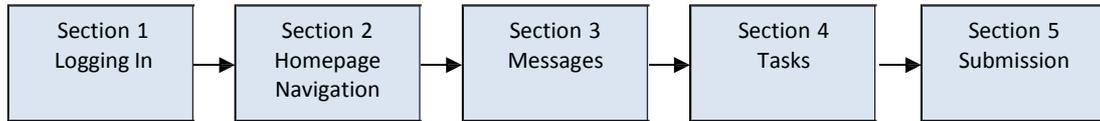
Headcount Portal Users

Index:

	Page no.
SECTION 1 – LOGIN TO HEADCOUNT PORTAL	2
• Register User	2
• Changing passwords and security details	3
SECTION 2 – HEADCOUNT PORTAL NAVIGATION	4
• Announcements, buttons and reports	4-5
SECTION 3 – MESSAGES	6
SECTION 4 – TASKS	7
• Adding children	8
• Adding carers (<i>including Decline to Provide information</i>)	9-10
• Adding weeks and hours to the headcount return (Edit Headcount)	11
• Instructions for claiming Extended Entitlement (30 hours)	12-13
SECTION 5 – SUBMISSION	14
• Submission Declaration	14
SECTION 6 – VALIDATING 30 HOURS FUNDING ELIGIBILITY CODES	15
• Run a new check and review previous checks	15
SECTION 7 – DISABILITY ACCESS FUND APPLICATIONS	16
• Select or add a child	16
• Upload evidence and check submission	17
• Submission confirmation	18



Headcount Portal Users



SECTION 1 – LOGIN TO HEADCOUNT PORTAL

Using the Web Address provided in your email.

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](#)

Log In

Username

Password

[Log In](#)

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

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

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

Register User

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

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

You must use this link to continue with your registration.

Each subsequent login to the Headcount Portal you will be directed to the Homepage as detailed in Section 2.

After following the Web Address sent in the confirmation email you will see the confirmation message displayed.

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

Change Password

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

Current password *

New password *

Confirm new password *

[Change password](#)

During this login you will be prompted to change your password to a memorable one, which:

- must contain between 10 and 128 characters; and must contain at least one of each of these: Upper Case, Lower Case, Numeric and Special characters (£\$%&* _etc) E.g. Password*1
- New password cannot be the same as the previous 10 passwords
- New password cannot numerically increment the existing password, e.g. you can't change Password*1 to Password*2

Please do not use Password*1 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](#)

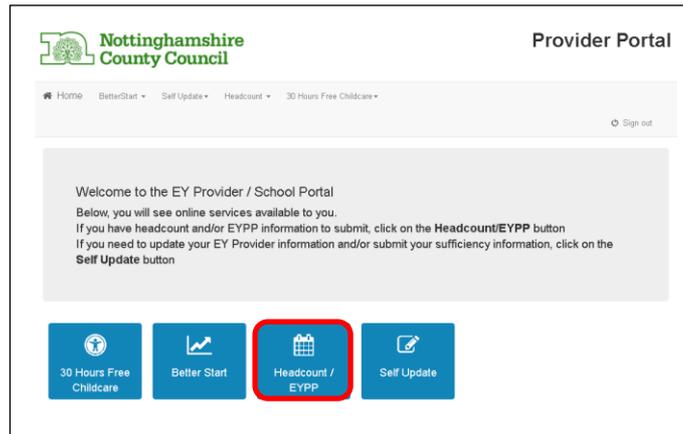
Congratulations you have now successfully logged in for the first time, and will have access to the Headcount Portal.

SECTION 2 – HEADCOUNT PORTAL NAVIGATION

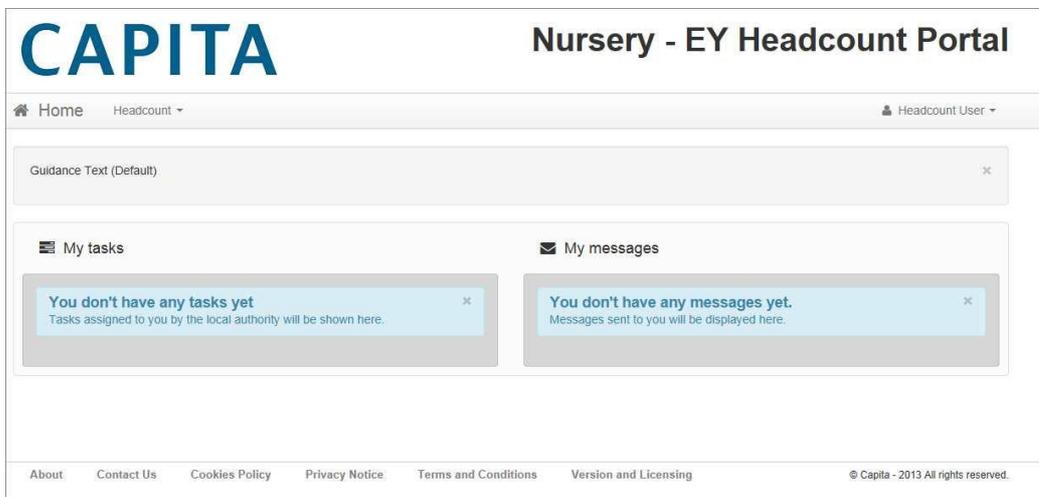


The Announcements page will be visible at every login, please read these carefully; select [Continue](#) to proceed to the Homepage which shows which various buttons (below).

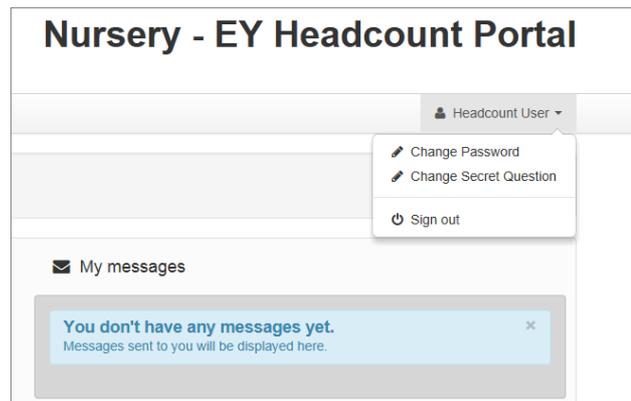
Choose the Headcount/EYPP button to take you to your tasks and messages.



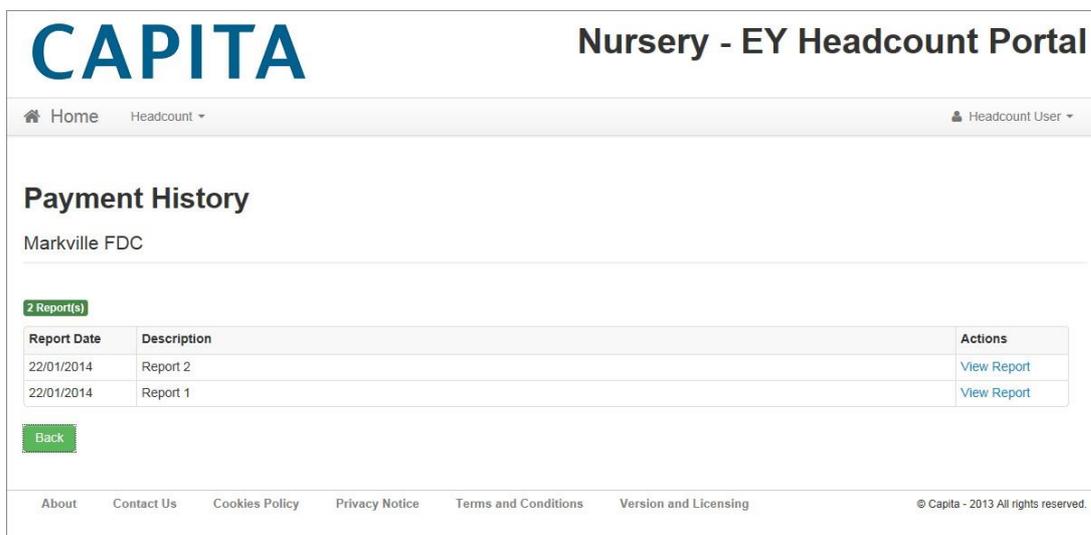
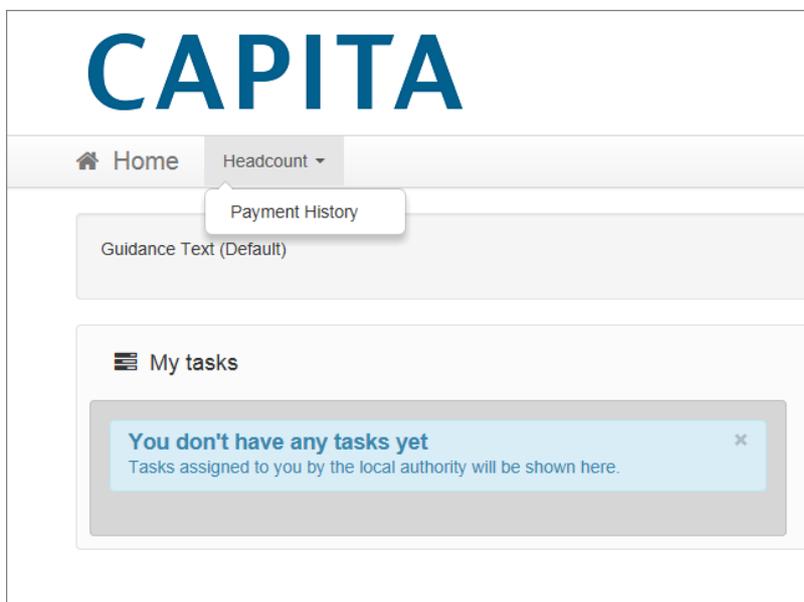
On initial login you may not have any Tasks to complete or Messages to read, the image below shows an empty new users page.



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



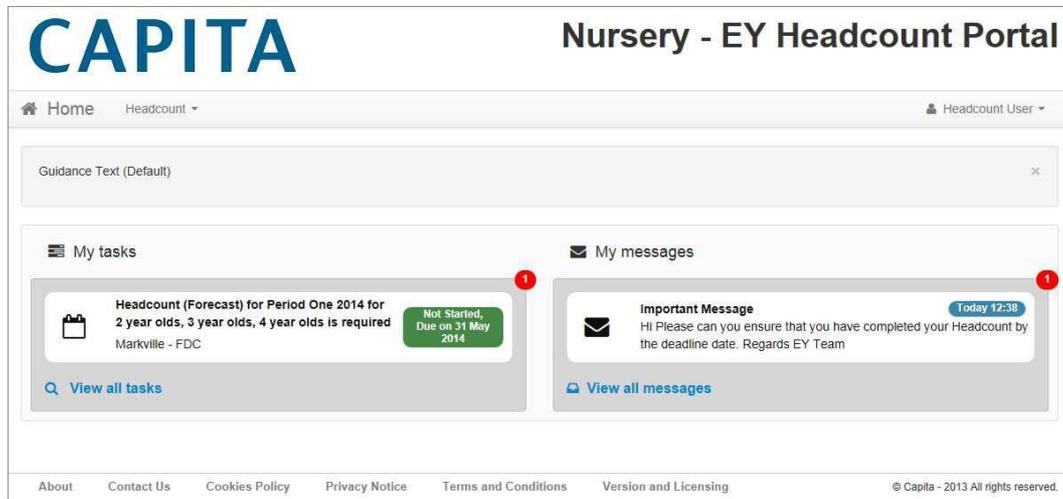
Selecting Headcount; Top Left, brings up a menu where you can access any reports that have been provided under Payment History



Note: If this page is empty either no reports have been issued or old ones have been cleared out.

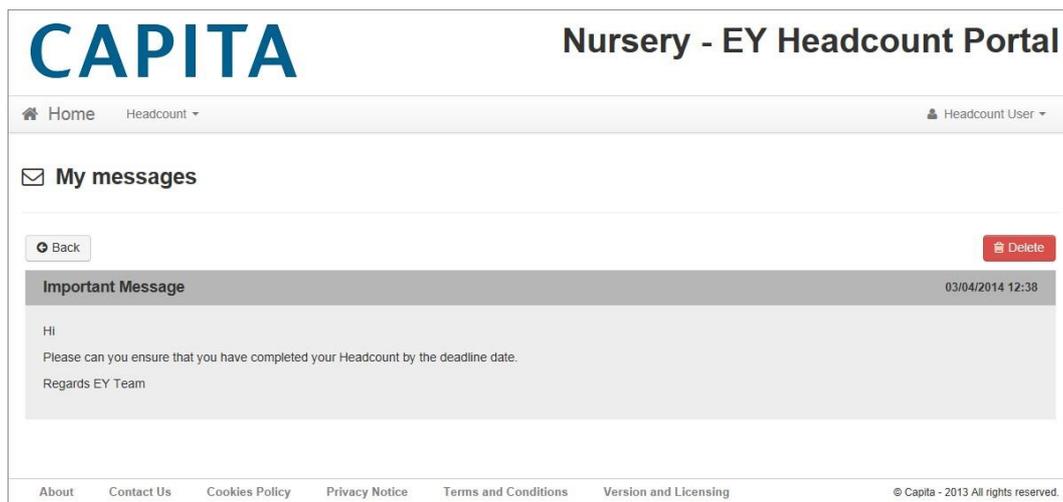
SECTION 3 – MESSAGES

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 should click on Headcount/EYPP and you will see the Message on your Homepage.



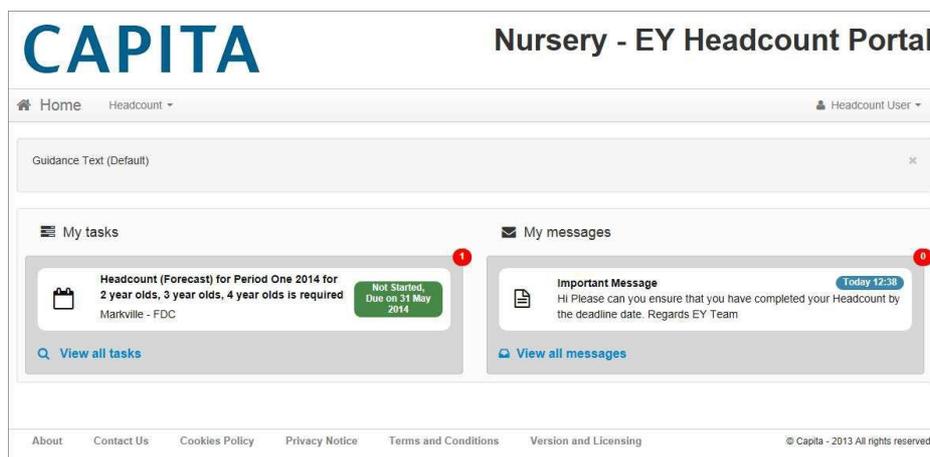
The screenshot shows the CAPITA Nursery - EY Headcount Portal homepage. The header includes the CAPITA logo and the page title. Below the header, there is a navigation bar with 'Home' and 'Headcount' dropdown menus, and a user profile for 'Headcount User'. A 'Guidance Text (Default)' box is visible. The main content area is divided into two sections: 'My tasks' and 'My messages'. The 'My tasks' section displays a task titled 'Headcount (Forecast) for Period One 2014 for 2 year olds, 3 year olds, 4 year olds is required' for 'Markville - FDC', with a status of 'Not Started, Due on 31 May 2014'. The 'My messages' section shows an 'Important Message' from 'EY Team' dated 'Today 12:38' with the text: 'Hi Please can you ensure that you have completed your Headcount by the deadline date. Regards EY Team'. Both sections have 'View all' links. The footer contains links for 'About', 'Contact Us', 'Cookies Policy', 'Privacy Notice', 'Terms and Conditions', 'Version and Licensing', and a copyright notice for '© Capita - 2013 All rights reserved.'

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



The screenshot shows the CAPITA Nursery - EY Headcount Portal with the 'My messages' section selected. The 'Back' button is visible. The selected message is an 'Important Message' dated '03/04/2014 12:38' with the text: 'Hi Please can you ensure that you have completed your Headcount by the deadline date. Regards EY Team'. A 'Delete' button is present in the top right corner of the message view. The footer is identical to the previous screenshot.

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.



This screenshot is identical to the first screenshot, showing the CAPITA Nursery - EY Headcount Portal homepage with the 'My tasks' and 'My messages' sections. The task and message details are the same as in the first screenshot.

SECTION 4 – TASKS

When a Headcount Task has been issued to your provision, 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 [View all tasks](#) allows you to look at historic information, i.e. closed tasks.

Click on a Task to open it.



Provider Portal

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	Leaving Date	Weeks Attended for Half Term	Maximum Hours Attended per week	Hours Attended for Half Term	Universal Hours Claimed per week	Universal Hours Claimed for half term	Extended Hours Claimed per week	Extended Hours Claimed for half term
	Test	Test		05/04/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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

Add Child

Please enter the child's forename and s

Forename

Surname

Cancel

Next

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

Choose the child's Gender and enter their Date of Birth, Ethnicity, First Language and Eligibility Code if they have one (only for children claiming 30 hours).

Complete the Postcode field and select Find Address – all available addresses will be returned.

Add Child

Personal Details Contact Details Other

Forename *

Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy) *

Ethnicity *

First Language *

Eligibility Code

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed then the correct address in the boxes provided. If you do not know the postcode, you can look it up [HERE](#).

Please format the postcode e.g. XXX XXX

Postcode *

Find Address

[I don't have a Postcode](#)

* Required field

Cancel

Save

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

Note: If no suitable Addresses are returned you can select [Enter Address Manually](#) and type the new address in. You can also check the Postcode by clicking on the link above the house number in the screenshot below.

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

Postcode *

[Find Address](#)

[Enter Address Manually](#)

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

[Previous](#)

[Next](#)

Add Child

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

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

House Number *

House Name

Street Name

District / Village

Town

County

Postcode *

[Find Address](#)

[Previous](#)

[Next](#)

On the address details page Select Save

Note: If the child is 3 or 4 years old you will be prompted with a message to **Add the Carer information**

Add Child

This child is in the correct age range for Early Years Pupil Premium - please supply the supplementary information requested below to allow us to check the child's eligibility for Pupil Premium. x

[Personal Details](#) [Parent/Carer Details](#)

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

Provide Parent/Carer Information * **Yes**
 Decline to provide

[Previous](#)

[Next](#)

* **Required field**

[Cancel](#)

[Save](#)

Selecting **Provide Carer Information** **Yes** will expand the Carer entry and prompt you to provide the details.

Note: you can select **Decline to provide** to proceed without the carer details, but you will not receive EYPP (Early Years Pupil Premium) funding for this child. These details can be provided at a later date

Provide Carer Information * **Yes**
 Decline to provide

Carer Details [+ Add Another Carer](#)

Forename *

Surname *

Date of Birth (dd/mm/yyyy) *

Relationship *

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

Reference Number * **National Insurance**
 National Asylum Support Service

The format of all valid National Insurance Numbers is two prefix letters, six numeric digits, and one suffix letter. e.g. AB123456C

Populate the carer details before selecting [Save](#).

This is the child's parent/carer/guardian, **NOT** the child carer provider details

George Ballerina [+ Add Another Carer](#)

Title *

Forename *

Surname *

Gender * **Male**
 Female

Date of Birth (dd/mm/yyyy) *

Relationship *

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

Reference Number * **National Insurance**
 National Asylum Support Service

The format of all valid National Insurance Numbers is two prefix letters, six numeric digits, and one suffix letter. e.g. AB123456C

Address * Does the applicant live at the same address as the child ?
 Yes
 No

Note: You can add multiple carers by selecting **Add Another Carer**

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

Status: Edited but not yet submitted

Deadline: 22 September 2017

XXX Notts Test Headcount Provider / XXX Notts Test Headcount Provider / Autumn (Period A - Sept & Oct) 2017 (01 Sep 17 - 31 Oct 17)

You can edit and re-submit this information at any time until the deadline of 22 September 2017.

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	Leaving Date	Weeks Attended for Half Term	Maximum Hours Attended per week	Hours Attended for Half Term	Universal Hours Claimed per week	Universal Hours Claimed for half term	Extended Hours Claimed per week	Extended Hours Claimed for half term
	Georgina	Ballerina		05/04/2014	3	01/09/2017		0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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

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

Status: Edited but not yet submitted | Deadline: 31 May 2014

Markville / FDC / Period One 2014 (01 Apr 14 - 31 Aug 14)

Legal Name	Start Date	Leaving Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	Shared Funding
Georgina Ballerina	01/04/2014			14.00					<input type="checkbox"/>

Complete the weeks and hours in each field starting with Weeks Attended, Maximum Hours Attended, 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.

Select

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

Status: Edited but not yet submitted

Deadline: 22 September 2017

XXX Notts Test Headcount Provider / XXX Notts Test Headcount Provider / Autumn (Period A - Sept & Oct) 2017 (01 Sep 17 - 31 Oct 17)

You can edit and re-submit this information at any time until the deadline of 22 September 2017.

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	Leaving Date	Weeks Attended for Half Term	Maximum Hours Attended per week	Hours Attended for Half Term	Universal Hours Claimed per week	Universal Hours Claimed for half term	Extended Hours Claimed per week	Extended Hours Claimed for half term
	Georgina	Ballerina		05/04/2014	3	01/09/2017		6.00	30.00	180.00	15.00	90.00	0.00	0.00

Note: if the child has left your setting, you need to put a leaving date. If this was in a previous term you may need to input the first day of the current term as a leaving date if you cannot save.

Instructions for claiming 30 hours – see also Section 6 on Validating Eligibility Codes

For 3 and 4 year olds on the headcount task, providers should identify that they are claiming one of the following:

- Universal Hours only (15 hours)
- Extended Hours only (15 hours)
- Both Universal and Extended (30 hours)

So on your actual headcount task for the first 6 weeks of the autumn term, and on all future headcount tasks, you should enter the number of hours your setting wishes to claim in the appropriate columns as highlighted below, and explained in the boxes on the right:

Edit - Headcount (Actual) for 2, 3 & 4 year olds Status: Edited but not yet submitted | Deadline: 22 September 2017

test provider / test provider / 3 Autumn Term September/October 2017 (01 Sep 17 - 31 Oct 17)

Legal Name	Funding	Start Date	Leaving Date	Other Details	Weeks Attended for Half Term	Maximum Hours Attended per week	Hours Attended for Half Term	Universal Hours Claimed per week	Universal Hours Claimed for term	Extended Hours Claimed per week	Extended Hours Claimed for term
					12.00	45.00	270.00	15.00	90.00	30.00	180.00
Test Test	EH	01/09/2017			6.00	30.00	180.00	15.00	90.00	15.00	90.00
Tester Tester	EH	01/09/2017			6.00	15.00	90.00	0.00	0.00	15.00	90.00



If you are claiming for the **full 30 hours for a child**, enter the total hours the child attends during the week in Max hours attended column and the system will default your claim to 15 hours Universal and 15 hours Extended

If you are claiming for just the Extended hours, use this example:

- enter 15 hours in Max hours attended column
- enter Zero hours in Universal column
- enter 15 hours in Extended Hours column.

In either of the above scenarios you should obviously only claim for the actual hours attended if the child attends for less than 15 or 30 hours.

If the Funding column does not say **EH** for a child, you'll not be able to enter the extended hours.

See next page for how to deal with this.

(Please note that you can only claim for a maximum of 15 hours for children in the two year old date of birth range.)

If the Funding column does not say **EH** for a child, click on the box to the left of the child's name and enter the child's Eligibility Code on the child details screen and press save:



Child Details

Personal Details

Carer Details

Forename *  Test

Surname *  Test

Gender * **Male**
 Female

Date of birth (dd/mm/yyyy) *  05/04/2014

Ethnicity *  WBRI - White British (WHB) 

First Language *  English (ENG) 

Funded Status  Let the system decide.

Eligibility Code  50001005011

 The Eligibility Code is an 11 digit integer e.g. 50001005014

You'll need to have validated this already in the 30 hours checker module of the portal (see Section 6 – Validating 30 hours codes)

Once you have a recognised code here, you'll be able to enter the extended hours in your headcount task.

(Please note that you can only claim for a maximum of 15 hours for children in the two year old date of birth range.)



= can be submitted



= parent/carer/guardian details need to be added, if known, or declined, if not known.

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?

✓

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.

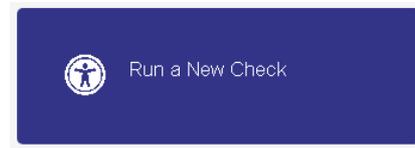
Note: When a new Task is issued to you, any 3 and 4 year old children highlighted in RED will need to have either the Carer added or Declined for EYPP before submission, this can be achieved by selecting ✕ at the start of the row containing the Child's details. There will be icons showing Eligibility for EYPP P and if a Child has Shared Funding S or EH eligible for Extended Entitlement or 2 eligible for 2 year funding, where relevant.

	Forename	Surname	Funding	Date of birth	Funding Age	Start Date	Weeks Attended for Half Term	Maximum Hours Attended per week	Hours Attended for Half Term	Universal Hours Claimed per week	Universal Hours Claimed for half term	Extended Hours Claimed per week	Extended Hours Claimed for half term
✕	Bara	Bobam		31/03/2011	4	01/09/2015							
✕	Matt	Lewis	P	12/03/2011	4	01/09/2015							
✕	Yara	Yobam	P S	31/03/2011	4	01/09/2015							

SECTION 6 – VALIDATING 30 HOURS FUNDING ELIGIBILITY CODES

Click on 30 Hours Free Childcare button

Then, click on Run a New Check button



You can either find an existing child whose details are already on the Provider Portal

Find a child

Surname, Forename, DOB, NI or Eligibility Code.

Or you can enter the information requested on this screen for each child and then click **Run Check**.

Please note – you should have written parental consent via the Parent Declaration form before you carry out any validation 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.

Child's Forename *	Child's Surname *	Child's Date of Birth *	Parent's NI Number *	Eligibility Code *
<input type="text" value="e.g. John"/>	<input type="text" value="e.g. Smith"/>	<input type="text" value="e.g. 30/11/2012"/>	<input type="text" value="e.g. NM123456C"/>	<input type="text" value="e.g. 50001005014"/>
				<input type="button" value="Run Check"/>



Review Previous Checks

You can click  Review Previous Checks to see Eligibility Status, Eligible From and To Dates and Grace Period End dates of children that you have already checked.

Existing Child Checks

Child's Forename ⇅	Child's Surname ⇅	Child's Date of Birth ⇅	Parent's NI Number ⇅	Eligibility Code ⇅	Check Last Run ⇅	Eligible From ⇅	Eligible To ⇅	Grace Period End ⇅	Check Status ⇅
Test	Test	05/04/2014	AA010203A	50001005016	02/05/2017	01/09/2017	30/11/2017	31/12/2017	Eligible

If you encounter a problem entering any data, please check you have keyed in the correct information from the Parent Declaration form. If you still encounter problems, please check with the parent/carer that they have provided the correct information.

Further note: once the code validation has been successful, you can confirm the child's place to the parent.

They can start their place the term after they turn 3 years old and have received a valid code, whichever is later.

Term start dates 1st Sept, 1st Jan, 1st April



Section 7: DISABILITY ACCESS FUND APPLICATIONS



Step 1) Go to Disability Access Fund

Step 2) Click on:



If the child you wish to make a DAF claim for is listed and has a 'yes' in the Age Eligibility column, then select them on left hand side, and continue:

Disability Access Funding Application

Select a child from the list to continue with the application

Find a Child

	Forename	Surname	Date of Birth	Age Eligibility
<input checked="" type="radio"/>	Test	Test	05/04/2014	Yes
<input type="radio"/>	TEST	TEST	01/09/2005	No

If the child you wish to make a claim for is not listed, then you can search for them in Find a Child. If you cannot find the child click **Add Child** and enter child details on this screen.

Add Child

To progress this application, enter the details of the child below

Forename *

Surname *

Gender * Male Female

Date of birth (dd/mm/yyyy) *

Ethnicity *

First Language *

Postcode *

[I don't have a Postcode](#)

* Required field

Step 3) On the next screen you'll either need to upload supporting documentation, or confirm that you will send it by post.

Our preference is for you to upload the documents rather than posting, as the provider portal is a secure means of submitting confidential information. In addition, your application will be dealt with quicker.

You'll need to upload the signed parent declaration form and DLA evidence.

Disability Access Funding Application

You should provide the Parent Declaration Form and DLA Award Letter to proceed with the Disability Funding Application (upload here or send by post)

Please upload the front page of the Parent Declaration Form here:

Parental Declaration Form

Choose File No file chosen

I will provide Parental Declaration Form by post to: Early Childhood Services, County Hall, West Bridgford, Nottingham. NG2 7QP

Please upload the front page of the DLA award letter which shows dates of entitlement:

DLA Award Letter

Choose File No file chosen

I will provide DLA Award Letter by post to: Early Childhood Services, County Hall, West Bridgford, Nottingham. NG2 7QP

Details to support your Disability Access Funding claim - Please enter a comment into this box

Cancel

Back

Continue

You'll also need to enter some text into the comments box, such as 'DAF application (date) – submitted by (name of member of staff)'. Then click Continue.

Step 4) Check all the information that is summarised on the next page and confirm by ticking **All the DAF details provided by me are correct** and press Submit

Disability Access Funding Application

Below is the summary of Disability Application Funding application

Child Details

Name	Test Test
Gender	Male
Date of Birth	05/04/2014
Address	1 Acacia Drive, Newtown, Anywhere, AB12 3DE
Ethnicity	WBRI – White British
First Language	English

Application Details

Provider	XXX Notts Test Headcount Provider
Service Name	XXX Notts Test Headcount Provider
Parental Declaration Form	Parent declaration form.docx
DLA Award Letter by Post	Yes
Details to support your Disability Access Funding claim - Please enter a comment into this box	DAF application 16/04/2018 submitted by J Smith (Nursery Manager)

All the DAF details provided by me are correct

Cancel

Back

Submit

Step 5) You'll get an application submitted message with a reference number.

Application submitted

Your application for Test Test has been submitted. You will be notified of the result of your claim by a message to your provider portal account.

Application reference number for your information:

DAF-1801-8S5FNHF3

The application reference above will help us with enquiries - please store it somewhere safe. If you have any further enquiries about your application or would like to take any further action please contact us at via email to eypp@nottsc.gov.uk or by post to Early Childhood Services, County Hall, West Bridgford, Nottingham. NG2 7QP

[Click Finish](#)

You'll then receive confirmation via the portal in the DAF module whether or not the application has been successful.

The screenshot displays a user interface with two main sections. On the left, under the heading 'Disability Access Funding Actions', there is a green button with a white accessibility icon and the text 'Create new Disability Access Funding Application'. On the right, under the heading 'My messages', there is a notification card. The card has a red circle with the number '0' in the top right corner. The notification text reads: 'Application for Disability Access Funding for a 3 year old child - reference DAF-1801-8S5FNHF3' followed by a date '22/01/2018' in a blue pill. Below this, it says 'This is to notify you that your application for Disability Access'.