Southampton City Council

**Provider Portal Guidance for Providers**

Contents

Logging in to the Portal

You will need to read and sign a Security declaration before being given access to the portal. Once you have signed this you will be given individual user IDs which must not be shared between staff at your setting.

1) To Log in to the portal click on the following link:

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

2) Enter the user details you have been given by the EY Funding team in the appropriate boxes (see number 5 below).
3) You will then be sent an email from FIS (Family Information Service). Click the link in the email which will then register you as a user. The link will take you back to the login screen.
4) Enter your user details again. You will need to update your password following the password guidelines and choose a security question.
5) Please enter your username and password into the appropriate boxes.
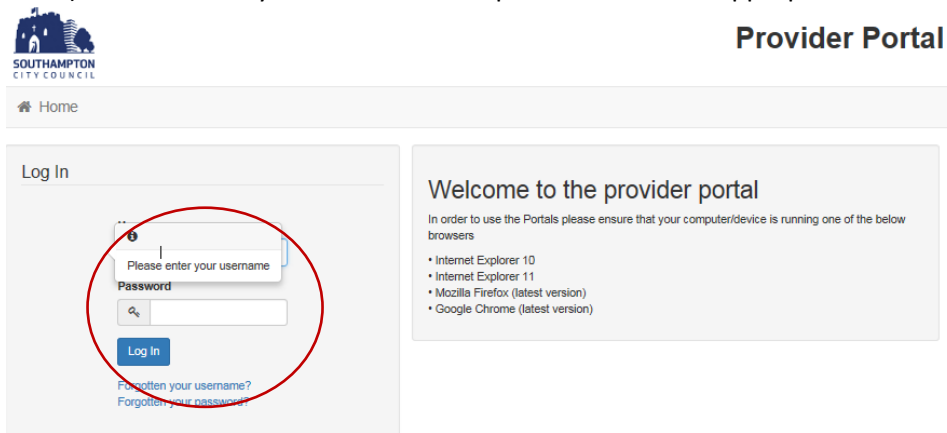
6) Enter your security question.
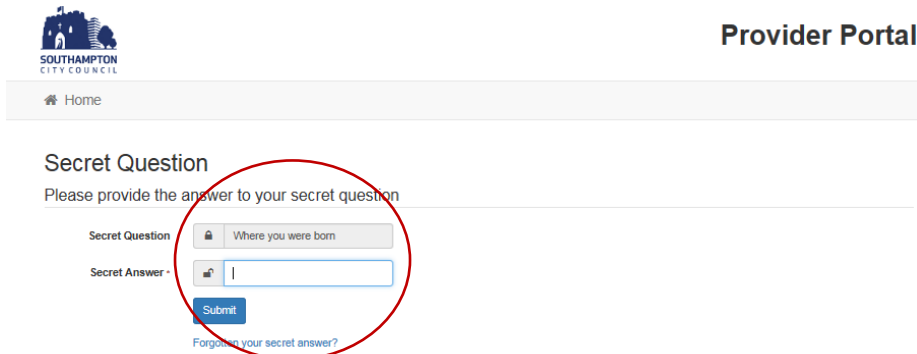
7) When you see the screen below you have successfully logged in
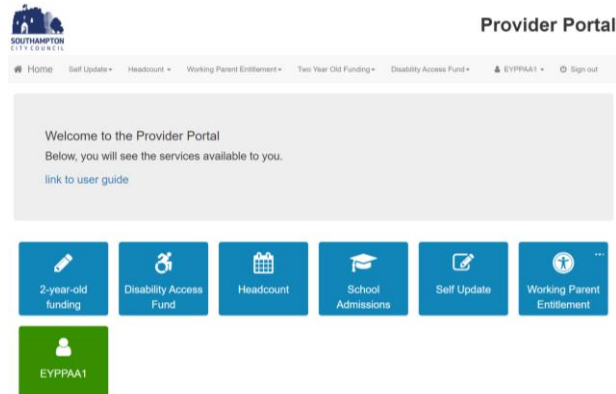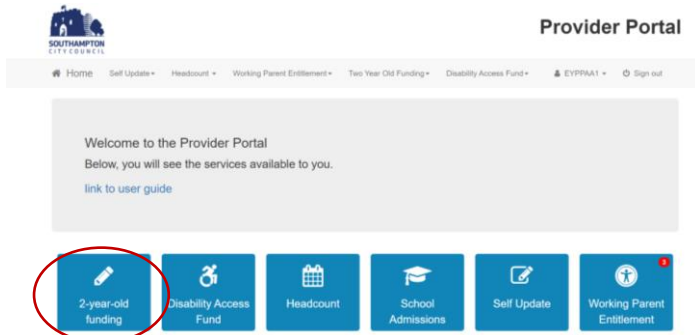
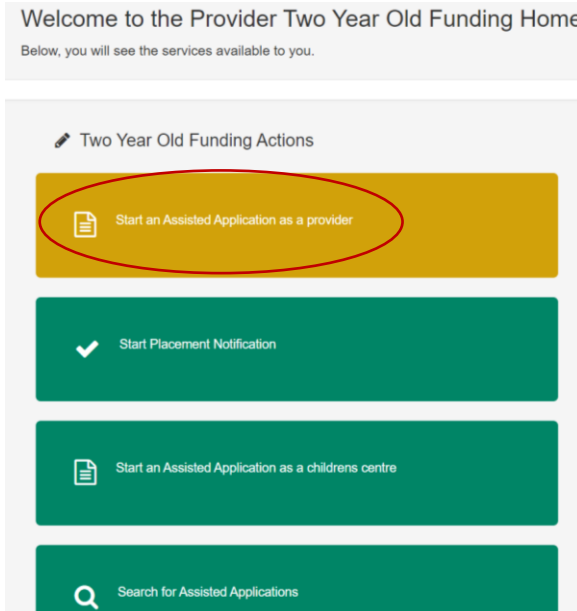# 2YR OLD CHECK – for Disadvantaged Children

You will need to complete this for all new 2 year applications . You do not need to do this for children already claiming 2 year funding.
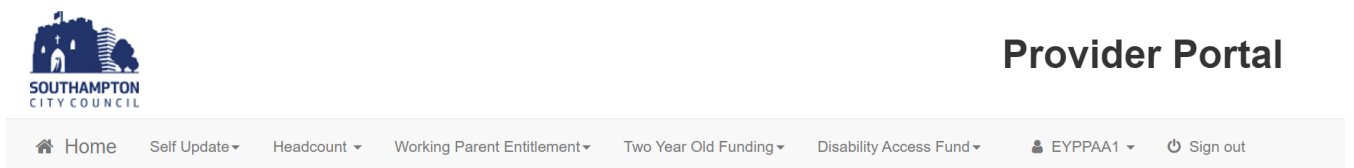
Completing an Application with a parent

1) Login to the Provider Portal
2) Click on the Two year old funding button

3) Click on start an assisted application as a provider

4) Enter the Child's DOB and Postcode and then click continue

5) Add the rest of the child's Forename, Surname, Gender, Ethnicity and Language.
6) Click on Find Address

7) Click on the correct address from the drop down list which will turn it blue and then click on the select button

8) You will then see the full address – please **do not** make any changes to this and then click continue

9) Enter the parent/carer details and click continue

There are two types of Disadvantaged 2yr Applications – the majority are a claim on Economic Grounds – it is always worth trying this first. The second is for non-economic claims and the criteria for these can be found on page 7.

Making an Economic Claim

1) Click on "Claim on economic grounds

2) Fill out the rest of the parent/carer details – making sure you check all details are correct including the child's details and the click continue.

3) Read the declaration and tick the "I agree" box if you agree with the statement and then click confirm.
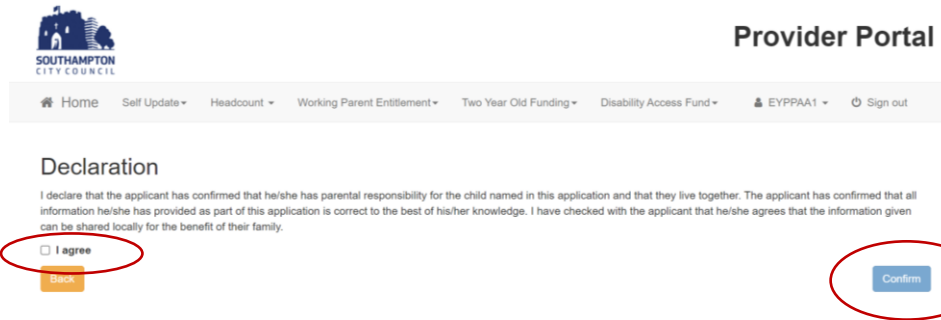
4) If the child is eligible then you will see a green tick and will be given a code and will have a date when the child is eligible. You can print a copy for the parent to keep hold of by clicking print copy. Once you have made a note of the number click finish.
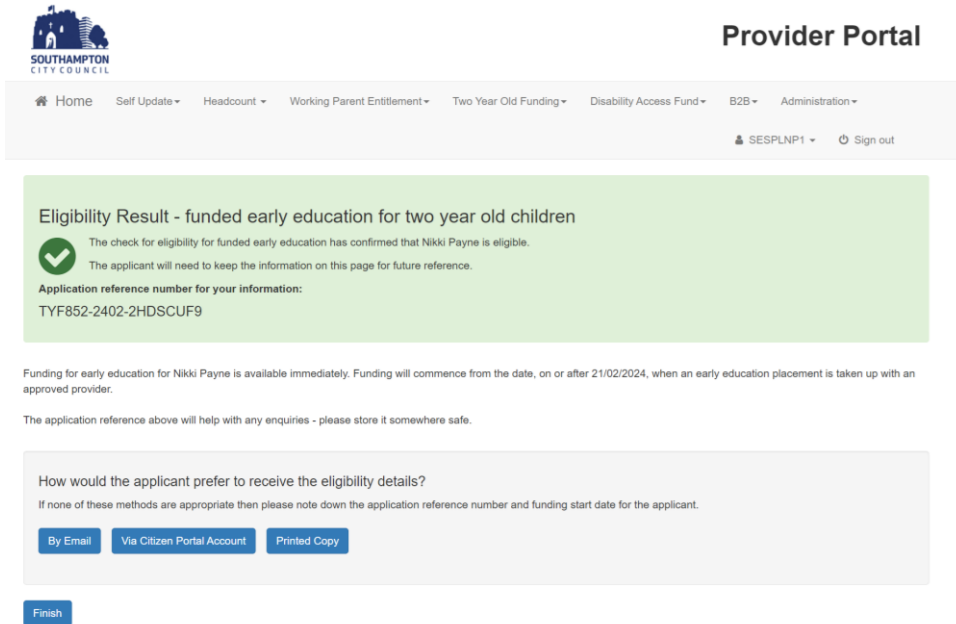
5) If the child is not eligible you will see a red cross in a red box – please note the reference number they have been given is NOT A 2YR CODE. Firstly click on the edit applicant details button and check everything submitted is correct. If it is not make any changes and resubmit.
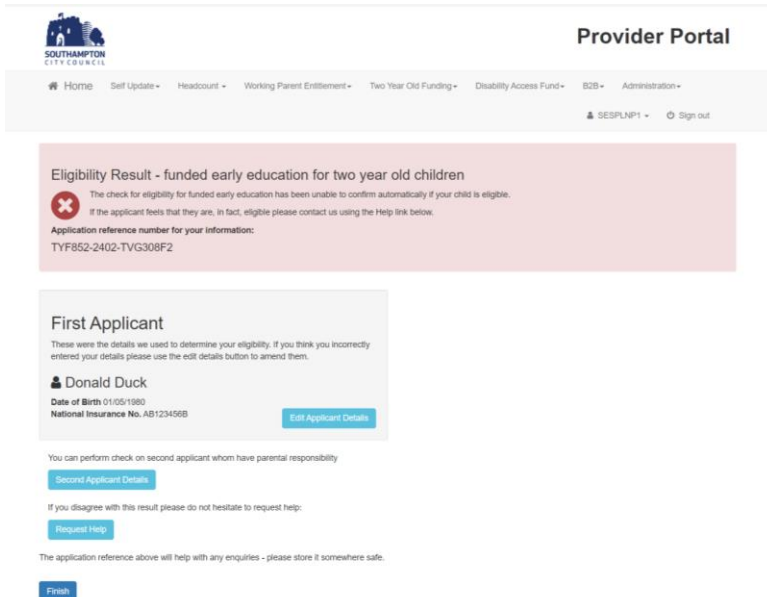
6) If you are still getting an ineligible result and you are sure the parent is eligible please complete a non-economic claim.

Making a non-economic Claim

You can make a non-economic claim for the following reasons:

a) If the child is looked after
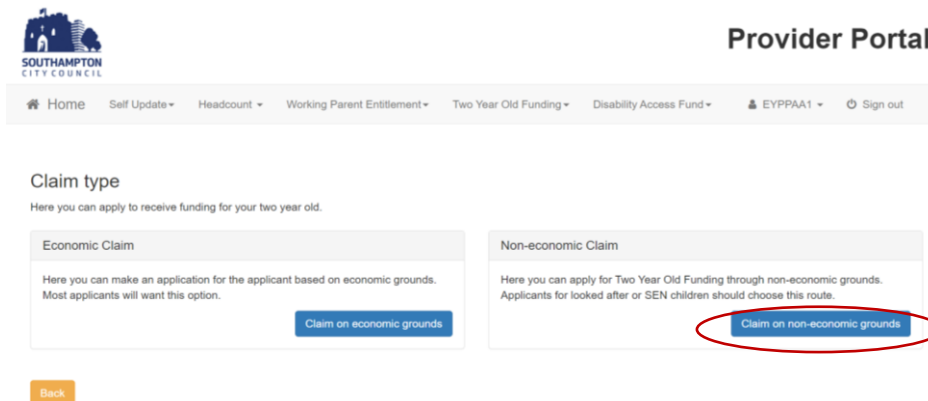b) If the child is adopted
c) If the child has a current Education, Health & Care Plan
d) The child has a disability
e) You have completed an economic claim but the result has come back as ineligible but you have evidence that the parent is eligible e.g. a copy of the relevant benefits. This would be a manual check.

If the child meets any of the above criteria then please continue:

1) Please complete steps 1 to 9 of the "completing an application with a parent" (see page 3) when you get to the claim type screen click on Claim on non-economic grounds.

2) Tick the box next to the criteria the child meets – in this instance I will complete a manual check. When you click a box will appear underneath. In this box state the reason why the parent meets the criteria – add in any information that supports their case.

3) Attach any documents that support the application by clicking the add file button and finding the document. This could include a copy of their relevant benefits, A copy of their disability living allowance if you are claiming under disability etc.

4) Click the browse button – find the file you want to attach click open and then the file will be sent to us.

5) Then tick the box stating the parent understands the conditions and has confirmed they are correct. Then click continue.

6) Add your name and phone number in the following box just in case we need to clarify anything and any other contact details that you may think are useful – then click continue.

7) Add the parent's phone number in the following box.

8) You will then be given a reference number – THIS IS NOT A VALID TWO YEAR CODE until we have validated it for you. Click Finish. We will then check the information submitted and after we have validated the claim you will receive a message via the portal.

Searching for your applications

1) Click on the search for assisted applications box. Enter the date range you would like to look at and click search. This will bring up a list of 2yr applications with their status. If you click on the application then it will bring up all the details.

Checking a 2yr old code – for Disadvantaged Children

When you have a valid code for a child you will need to add them to your setting which is done by a placement notification (see below) and will add them to your headcount.

PLEASE NOTE THIS WILL ONLY WORK WITH A 2 YEAR OLD CODE STARTING WITH "TYF852"
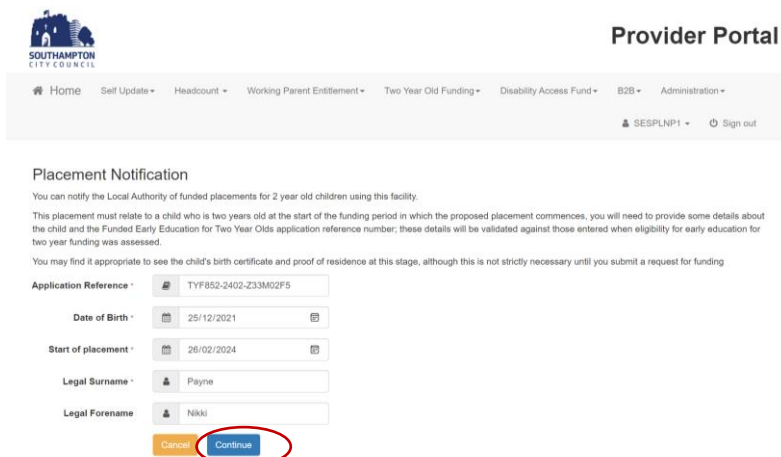
1) Login to the Provider Portal
2) Click on the Two year old funding button
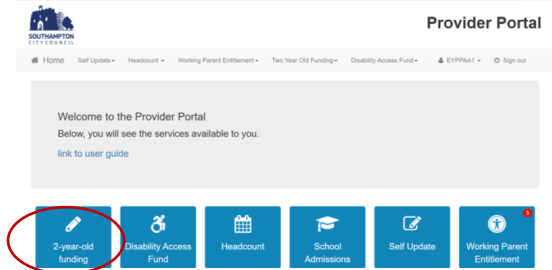
3) Click on Start Placement Notification
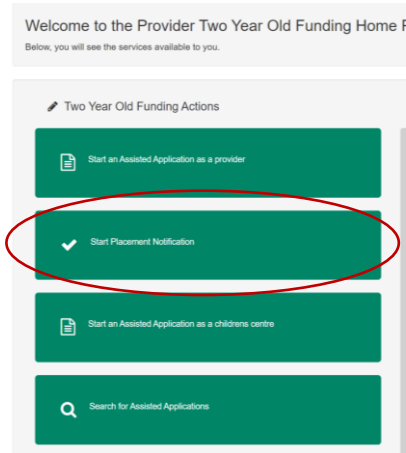
4) After checking that you have entered everything correctly then click continue. **The start of placement date will be the first day the child is claiming funded hours at your setting.**

5) If you are satisfied everything is correct click the declaration box and then click agree and continue.

6) Confirm the address is correct

7) Confirm that the child is expected to be at that address when they start the placement at your setting

8) Select the setting from the provider box and put a tick in the service box and then click continue.

9) Tick the declaration box if you agree with the statement and then click continue.

10) Click finish. This will automatically add the child to your next headcount task with the start date you entered in the placement date box – It may take up to 5 minutes for the child to appear if you have a current headcount task open.

WORKING PARENT ENTITLEMENT

The portal will allow you to check the validity of any codes a parent presents to you and will also allow you to see any codes that are due to expire.

Checking a working parent code

1) Click the Working Parent Entitlement box
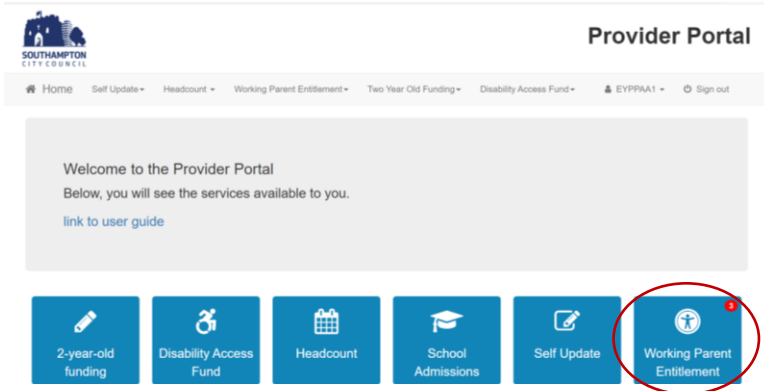
2) Click on run a new check
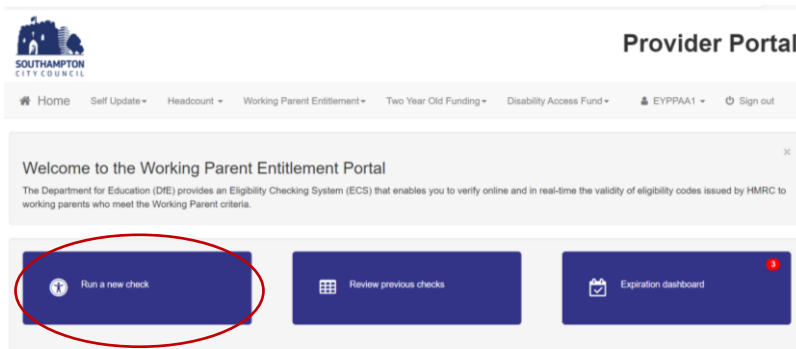
3) Add the child's forename and surname into boxes provided and if the child comes up below select them.
4) Add in the rest of the child's details and click run check
5) Enter the parents NI Number and the eligibility codes in the correct boxes making sure you have copied them correctly. Then Click Run Check.

6) If the check is valid you will see a big green tick in a green box with the eligibility codes dates and will add the code to the child enabling you to enter the child's extended hours in your headcount.
7) Please note the Valid from date is the date the parent applied for the code not the date they can claim funding which is usually the term after this date.

8) If the code comes back as invalid you will see a red box – if this is the case please go back and check all the details are entered correctly and resubmit. The most common reason for failure is the child's date of births do not match with the checker. This could be because the parent entered them incorrectly when applying or because the DOB you have entered is incorrect.

9) If you cannot find the child in the box, run an ad-hoc request by clicking on the green Add Child's details here button at the bottom of the screen.

10) Click on the blue OK button to confirm you wish to add a new child,then manually complete the details as required and click on the green Run check. As before you will see either a green tick (eligible) or red box (invalid)

Checking the dates associated with your codes

Our database will check every code due to expire daily and update your portal so they should be up to date. You can however run a manual check if you know a parent has completed their 3 monthly re-submission by:

1) Click on the expiration dashboard in the Working Parent Entitlement section of the Portal
2) Choose the filters you require and click search
3) This will bring up a list of children who fit the filters you searched on.
4) To re-check their code click on the recheck now option.

5) The dashboard can also show you which parents you need to remind to complete their 3 monthly resubmit via the DFE and also which parent's eligibility is ending.

HEADCOUNT

Opening New Headcount Task

1) Whenever the Funding team sends out a task you will receive an email letting you know.
2) When you receive the email, log in to the portal and view 'my tasks' on your homepage.
3) You will see a list of tasks for every setting that you are assigned too and that task's status.
4) Click on an open task – these say 'not started' or 'unsubmitted' in a coloured box (Orange for Due, Red for overdue) next to the task.
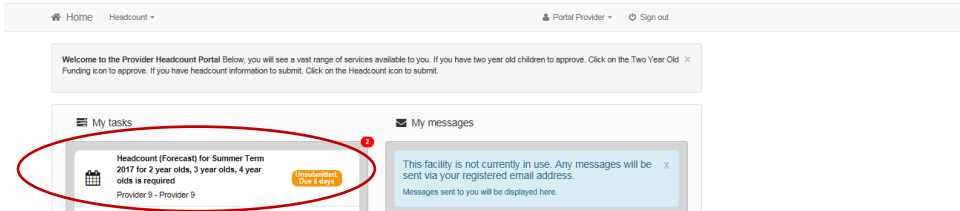
You will then be shown a list of all children that we believe are currently at your setting.

5) Before proceeding you will need to add missing information for each child marked with a red triangle. If you hover over the red triangle next to the child's forename it will tell you what info is missing.
6) Click on the blue box and this will open the child details. You will need to fill out every field with a red star next to it which is a required field. If you do not know the ethnicity please enter NOBT.

7) To search for a language please click on the box next to the language which says please select. Then type the language you are looking for in the search box.

8) If a child is missing their Working Parent Entitlement code you will need to add it in the eligibility code box before you can add any extended hours funding on the headcount.
9) You will then need to add the child's carer details which will then automatically calculate EYPP if they are eligible. If you 'decline to provide' the details then no EYPP will be paid for the child.

10) Fill in all the carer details as this will check the EYPP for the child. Click on 'add another carer' if you would like to add a separate carer. When all carers have been added click save.

Adding a New Child

1) Click the add child button.
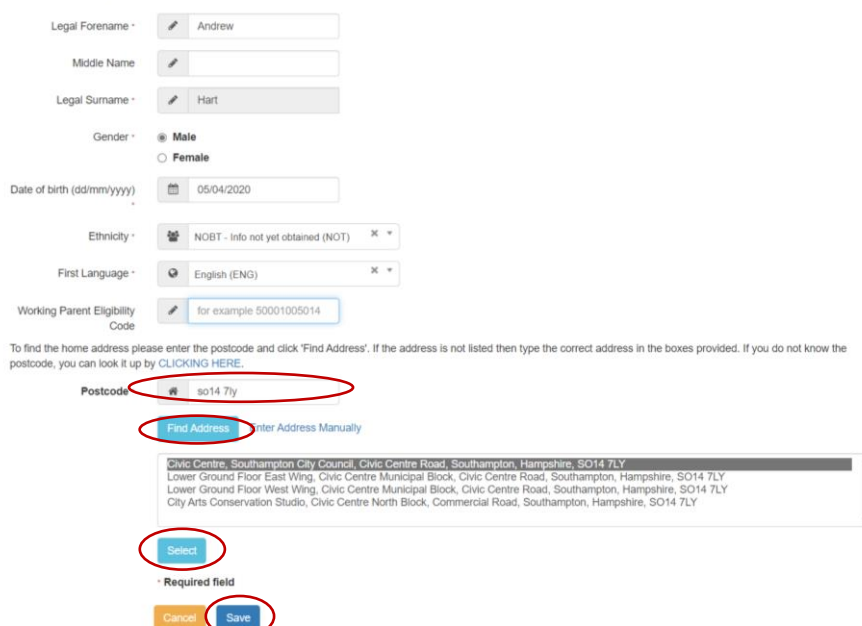
2) Enter the child's forename and surname then click next.
3) Complete all the other details for the child.
4) Enter the child's Working Parent Entitlement in the eligibility box.
5) To find their address enter their postcode in the postcode box and click find address. Select the address from the drop down box using the arrows to scroll through all the addresses. Click select and make sure the correct address has popped up. If everything has been entered click save.

6) Enter the carer details and this will check for EYPP.
7) When all your children have been validated and added (a blue box next to their name) then continue with submitting your task below.

Adding a 2yr Old

1) Add the child as above.
2) See Guidance for 2yr old (Disadvantaged Children) in the section at the beginning of the guidance.

Updating a Child's Address and other details

1) Open a task.
2) Click on the blue box next to the child to bring up the child's details.

3) Click on the 'use another address' button

4) To find their address enter their postcode in the postcode box and click find address. Select the address from the drop down box using the arrows to scroll through all the addresses. Click select and make sure the correct address has popped up. If everything has been entered click save.

5) To update any other details just change the incorrect detail to the correct one and click save.

Submitting a Task

1) Click the 'edit headcount' button

Legal Name	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term
				28.00	110.00	41.17	397.02	15.00	165.00
Jack Abba	01/01/2024		38 Week Term ⌄	11.00	30.00	15.00	165.00		
Nikki Abba	19/02/2024		51 Week Stretc ⌄	6.00	35.00	11.17	67.02		
Alec Baldwin	17/04/2023		38 Week Term ⌄	11.00	45.00	15.00	165.00	15.00	165.00

2) For every new child you will need to add a start date – new children have start dates highlighted green.

3) Select the stretch offer the child is on – **this must be completed even if they are Term Time Only**.

4) Complete the weeks attended for each term (Look at the week's calculator for each term to make sure you have the correct number of weeks).

5) Complete the average hours attended per week column which is the **actual hours** the child attends the setting in an average week.

Legal Name	Start Date	End Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Funded/Universal Hours Claimed per week	Funded/Universal Hours Claimed for term	Expanded/Extended Hours Claimed per week	Expanded/Extended Hours Claimed for term
				28.00	110.00	41.17	397.02	15.00	165.00
Jack Abba	01/01/2024		38 Week Term ⌄	11.00	30.00	15.00	165.00		
Nikki Abba	19/02/2024		51 Week Stretc ⌄	6.00	35.00	11.17	67.02		
Alec Baldwin	17/04/2023		38 Week Term ⌄	11.00	45.00	15.00	165.00	15.00	165.00

6) Add the Universal Hours (Normal Funding and Disadvantaged 2 year olds) the child is claiming funding for in the Funded/Universal Hours Claimed per week column.

7) Add the Extended hours (Working Parent Entitlement) the child is claiming funding for in the Expanded/Extended hours claimed per week column. You will only be able to add these if the child has a valid Working Parent Entitlement code attached to them – see the Working Parent Entitlement code checking guidance above.

8) If a child is only claiming Extended hours with you please leave the Funded/Universal hours as 0 and put the number of extended hours they are claiming in the Expanded/Extended hours column.

9) **Check that the hours claimed are correct and in the correct column. This is calculated automatically however**, if the child is a stretch child please overwrite this column with the correct hours.

10) Once all children have been completed click save. If you are called away from completing all children click save and you can come back to it at a later date by clicking edit headcount as above.

11) To download a copy of the submission for your records click on the download button on the homepage which will export a copy to excel.

Removing a child from your setting

1) Click edit headcount.
2) Enter an end date for the child in the end date box.
3) Calculate the funded weeks the child attended the setting remembering that only full funded weeks are counted. Use the calendar in the appendix below to help.
4) Enter the number of funded hours the child attends.
5) If you have claimed for a child in the headcount payment who did not start – please enter an end date the same as the start date and leave the hours blank.
6) Click save.

Changing a child's funded hours midterm

1) From the task home page click on the add line button

2) Click yes to confirm you want to add a new attendance line.
3) Click edit headcount
4) Add the day before the child changed hours as the end date on row one and enter the number of **funded weeks** the child had at the setting before this date. Please use the calendar in the appendix to calculate this remembering only full funded weeks can be claimed for.

5) Add the date the child's new hours started as the second lines start date and leave the end date blank.
6) Overwrite the number of weeks remaining in the term in the weeks attended per term column. Update the hours columns making sure you overwrite both the average hours attended per week and the hours claimed per week columns so they are the same. In the above example Jack Abba had 5 weeks at 15 hours and then 6 weeks at 10 hours changing on the 26th February.
7) Click Save.

When you are happy that everything has been entered correctly and accurately click submit.

Click confirm once you have read the submission declaration and then click yes to submit headcount. This will then submit your headcount to the Early Years Funding Team. You can make changes up until the task deadline. After making changes please make sure you click submit again. Please do not click submit more than once a day however as this causes issues in the software.

Appendix

1) Weeks in each term table

This table shows the number of weeks in each term depending on the type of stretch offer that a child receives. For example - If a child is term time only then they receive 38 weeks a year and this is split into 13 weeks in the summer term, 14 weeks in the autumn term and 11 weeks in the spring term and the maximum number of hours they can receive across all settings they attend is 15 hours. If a child is on a 51 week stretch offer then they receive 51 weeks a year and this is split into 22 weeks in the summer term, 16 weeks in the autumn term and 13 weeks in the spring term and the maximum number of hours they can receive across all settings is 11.17 in a week.

Stretch offer	Max hours per week	Summer Term Weeks	Autumn Term Weeks	Spring Term Weeks
38 – Term Time Only	15	13	14	11
39	14.61	13	15	11
44	12.95	16	15	13
46	12.39	18	15	13
48	11.87	20	15	13
50	11.40	22	15	13
51	11.17	22	16	13
52	10.96	22	17	13

2) Weeks Calculator

See separate document sent out each term by Funding team to calculate the weeks.