



One Self Update Provider Portal

last updated for the Autumn 2017 release

Handbook

CAPITA

Revision History

Version	Published on
Autumn 2017 (3.64) - 1.0	09/11/2017

Doc Ref

One Self Update Provider Portal Handbook/Autumn 2017/2017-11-09

© Capita Business Services Ltd 2017. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

www.capita-one.co.uk

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on [My Account](#).

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

01 / Introduction to the Self Update Provider Portal	1
Overview	1
What's New in this Release	1
Using this Handbook	1
02 / Administering the Provider Portal	3
Introduction	3
Setting the Language in Chrome	3
Common Functionality	3
Customising Text	4
Message Templates	5
Editing a Template	5
Managing User Accounts	6
Creating a Portal User Account	6
Setting up User Accounts in the v4 Client	6
Setting Up Two Step Verification	7
Managing User Access	8
Granting Access to Providers and Services	8
Removing Access from a User	8
Reviewing Users	9
Introduction	9
Viewing User Details	9
Updating a User Email Address	9
Resetting a User Password	9
Resetting a User Account	10
Permissions	10
Assigning Access to Business Processes	10
Portal Administration Access	10
SUPP Administration Access	11
Provider Access	11
Guidance Notes	11
Updating Guidance Notes	12
03 / Administering the Self Update Provider Portal	15
Introduction	15
Configuring the Self Update Portal	16
Updating the General Configuration	17
Configuring a Scheduled Notification Task	17
Managing Provider Self Updates	19
Viewing Provider Self Updates	19
Approving Provider Updates	26

Overwriting Provider Updates	27
Editing Provider Updates	28
Rejecting Provider Updates	30
Sending Messages	31
Introduction	31
Viewing Sent Messages.....	31
Composing a New Message.....	32
04/ Using the Self Update Provider Portal.....	37
Introduction	37
Activating a Portal User Account	37
Logging into the Portal	37
Retrieving Your User Name	37
Resetting Your Portal Password	38
Resetting Your Secret Question	38
Accessing the Self Update Portal	39
Setting Up Two Step Verification	39
Viewing and Updating Census Details.....	40
Introduction	40
Viewing Sent Messages.....	43
Viewing Service Details	44
Viewing Providers and Services	44
Viewing Service and Consent Details.....	45
Viewing Availability and Capacity	46
Viewing Travel, Costs and Facilities	50
Updating Service Details.....	52
Introduction	52
Updating Service Basic Details.....	53
Updating Consent Details	55
Updating Availability and Capacity Details	57
Updating Travel Information	65
Updating Service Charges.....	67
Updating Cost Details	69
Updating Facilities.....	69
Adding a Service.....	70
Clearing Submitted Changes	72
Clearing All Related Changes.....	72
Index	75

01 / Introduction to the Self Update Provider Portal

Overview

The Self Update Provider Portal (SUPP) enables Early Years providers to view the information that is stored about them and their services in One Early Years v4. Providers can use the portal to add missing information or update incorrect information.

Local Authorities can view the changes submitted by Early Years providers. They can approve, reject or change the submissions before updating the One v4 Client.

What's New in this Release

- Early Years Census: changes have been made to enable the provider to update or add any missing information via the portal. This includes staff summary details and provider opening hours. For more information, see [Viewing and Updating Census Details](#) on page 40.
- The LA can now create and send SUPP related messages to providers in a similar way to other Provider portal modules. A filter enables the LA to view which providers have or have not submitted their census information. For more information, see [Sending Messages](#) on page 31.
- Providers can now view and update information regarding Travel, Costs and Facilities. The Local Authority can configure the portal to switch this functionality on or off. For more information, see [Configuring the Self Update Portal](#) on page 16, [Viewing Travel, Costs and Facilities](#) on page 50, [Updating Travel Information](#) on page 65, [Updating Service Charges](#) on page 67, [Updating Cost Details](#) on page 69 and [Updating Facilities](#) on page 69.
- A new scheduled task enables a notification to be sent by email to the LA regarding the provider updates that are awaiting approval. When the One Education Autumn 2017 release (3.64) is implemented, the scheduled task is automatically inserted into the scheduler. The Local Authority can change the configuration of the scheduled task in the One v4 Client via **Tools | Administration | Schedule Task**. For more information, see [Configuring a Scheduled Notification Task](#) on page 17.
- A new check box, **Offers Extended Hours**, can be updated via the portal. For more information, see [Updating Service Basic Details](#) on page 53.

Using this Handbook

This handbook is intended for the use of Local Authority administrators using the Self Update portal to view and approve the changes submitted by providers.

The first chapter gives an overview of the Self Update portal and any changes made for the current release.

The second chapter describes the Provider portal administration functions including managing user accounts.

The third chapter covers the administration functions in the Self Update portal including the processing of provider self-updates.

The fourth chapter gives an overview of the functionality used by providers to view and update their details.

Introduction to the Self Update Provider Portal

More Information: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide available on My Account and on the One Publications website.

02 / Administering the Provider Portal

Introduction

The **Administration** menu route enables the Local Authority Provider Portal Administrator to perform the following processes:

- Manage the setup and configuration of the website.
- Manage user accounts and access to provider details.

More Information: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities* technical guide available on My Account and on the One Publications website.

Setting the Language in Chrome

If the Provider portal is accessed using Google Chrome, the language must be set to English (United Kingdom).

English (United Kingdom) must be the first language in the list.

For more information regarding setting the language in Google Chrome, refer to: <https://support.google.com/chrome/answer/95416?hl=en-GB>

Common Functionality

The following functionality is common for all processes in the Provider portal.

Function	Description
Tooltips	Using the mouse, hover over an item on the screen to display a description of the information displayed or the action required.
Home button	Click the Home button to display the Home page
Change Password	Click the drop-down adjacent to the user name and select Change Password . Enter your Current password , New password and Confirm new password . Click the Change password button.
Change Secret Question	Click the drop-down adjacent to the user name and select Change Secret Question . Enter your Current Password , Select a New Secret Question and enter a Secret Answer . Click the Save button. NOTE: This functionality is only available if second factor authentication is enabled.
Enable Two Step Verification	Click the drop-down adjacent to the user name and select Two Step Verification . Select Email from the Preferred method drop-down. Click the Save button. You will be signed out and will need to sign in again.
Disable Two Step Verification	Click the drop-down adjacent to the user name and select Two Step Verification . Select No Two Step Verification from the Preferred method drop-down. Click the Save button. You will be signed out and will need to sign in again.

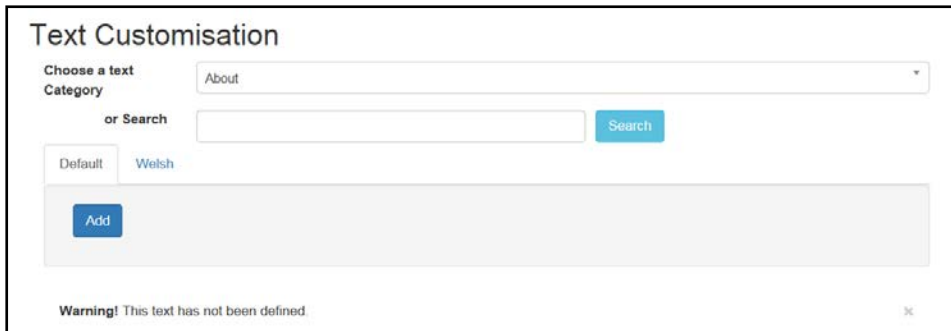
Function	Description
Sign out	Click the Sign Out button adjacent to the user name.

Customising Text

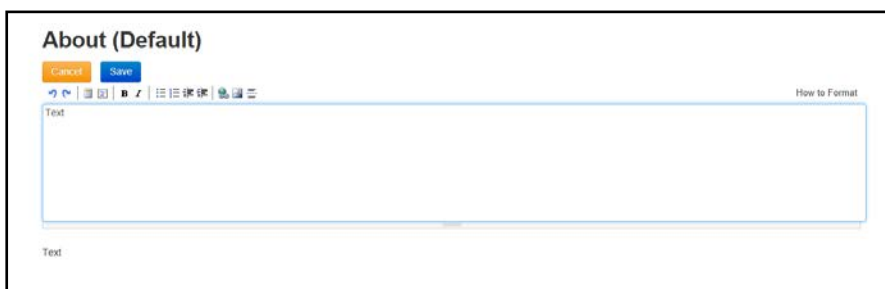
All text, field labels and messages that are displayed on the website can be configured.

Type	Name	Description
Site Notices	Announcements and Welcome Text	Displayed when the user logs into the portal.
	Provider Home Guidance Text	Displayed on the Home page.
	About Contact Us Cookies Policy Privacy Notice Terms and Conditions Version and Licensing Submission Declaration	Text is displayed when the user clicks the corresponding button at the bottom of each page.
Text Resources		Field labels, user messages and tooltips (text displayed when a user hovers the mouse over a field).
Address	Address Registration	Guidance text displayed for address fields.
Module specific		Guidance text and other text displayed on module-specific pages.
Email		Text for standard emails and messages relating to managing user accounts.
Message	Message Report Sent Body	Text for the message to be sent to a portal user when a new report is available to view. NB. Not used in Training Manager.
Report		Guidance text for reports.
Site Titles	Site Title	Displayed at the top right-hand side of every page.
Tooltip	Tooltip for New Password	Displayed when user sets up a new password.

1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.



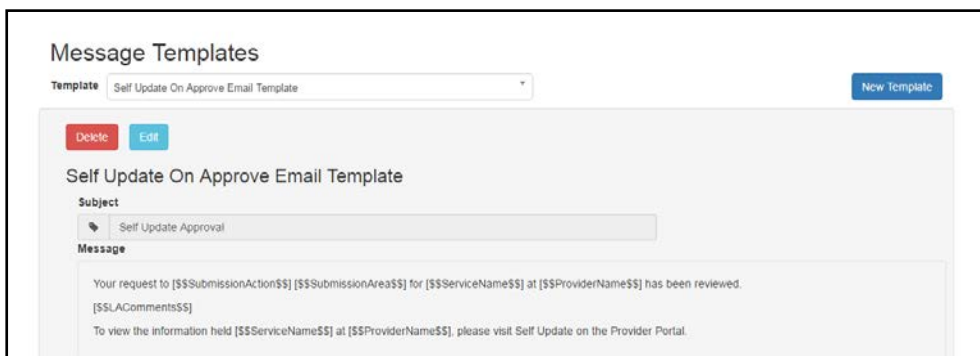
2. From the **Choose a text category** drop-down, select the category of text to be configured. Alternatively, enter search criteria, click the **Search** button and select the text.
3. Select the **Default** or **Welsh** tab to determine the text language.
4. Click the **Add** button.



5. Enter required text in the formatting panel. Formatting buttons are provided above the panel. The formatted text is displayed beneath.
6. Click the **Save** button.

Message Templates

Messages can be composed and sent to one or more users. The message can be free text or can use a pre-defined template.



Editing a Template

1. Select **Administration | Site Setup | Message Templates** to display the **Message Templates** page.
2. Select a **Template**.
3. Click the **Edit** button to display the **Edit Template** page.

The screenshot shows the 'Edit Template' interface. At the top, there are two input fields: 'Template Name' with the value 'Self Update On Submit Email Template' and 'Subject' with the value 'Self Update Submission'. Below these is a rich text editor for the 'Message' field, containing the text: 'A request to [\$\$\$SubmissionAction\$\$\$] [\$\$\$SubmissionArea\$\$\$] has been submitted to [\$\$\$ServiceName\$\$\$] at [\$\$\$ProviderName\$\$\$]. [\$\$\$ProviderComments\$\$\$] Services can be accessed through Self Update.' The editor has a toolbar with various formatting options. Below the editor are 'Cancel' and 'Save' buttons. At the bottom, there is a 'Preview' section showing the rendered version of the message content.

4. Make the required changes to the **Template Name**, **Subject** or **Message** text. Formatting buttons are provided above the panel.

The amended text is displayed in the **Preview**.

5. Click the **Save** button.

Managing User Accounts

The association of permission roles to a user account in the v4 Client enables access to the Self Update Provider Portal (SUPP). The permissions associated with the role control user access to business processes. For information about permissions, see [Permissions](#) on page 10.

The services that a user can access are managed in the Provider portal by selecting **Manage Access** from the **Administration** menu.

Creating a Portal User Account

To create a new portal user account, the One System Administrator must:

1. Set up the user in the One v4 Client and assign to them to the relevant user group via **Tools | Administration | User Management | User Accounts**.
2. Send the log in details (user name and initial password) to the new user via email.

Setting up User Accounts in the v4 Client

To set up a new user account in the One v4 Client:

1. Create a user account.
1. Create a user group.
2. Associate the user account to the user group.
3. Assign business processes to the user group.
4. Assign access rights. For more information, see [Assigning Access to Business Processes](#) on page 10.

More Information: *Managing Users in v4* chapter in the *One System – Managing Users, Groups & Permissions* handbook available on the One Publications website.

Setting Up Two Step Verification

Introduction

If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

The screenshot shows the 'Two Step Verification' configuration page. At the top right, there is a user profile icon and a 'Sign out' button. The main heading is 'Two Step Verification'. Below it, there is explanatory text: 'Two Step Verification is our way to make your data more secure. If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe. Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled. Changing your preference will sign you out, and you will need to sign in again.' Under the heading 'Preferred method', there is a dropdown menu currently set to 'No Two Step Verification'. A blue 'Save' button is located at the bottom left of the form area.

2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.

You will be signed out and will need to sign in again.

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

The screenshot shows the 'Two Step Verification' configuration page, identical to the previous one. However, the 'Preferred method' dropdown menu is now set to 'Email'. The 'Save' button remains at the bottom left.

2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.

You will be signed out and will need to sign in again.

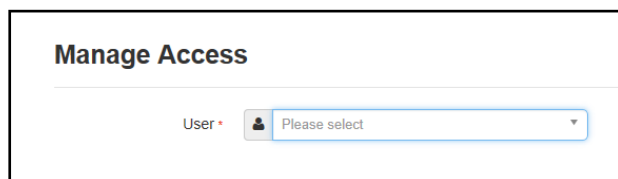
Managing User Access

Granting Access to Providers and Services

After a user is created and assigned to the appropriate security group in the v4 Client, they must then be granted access to the required providers and services in the Provider portal.

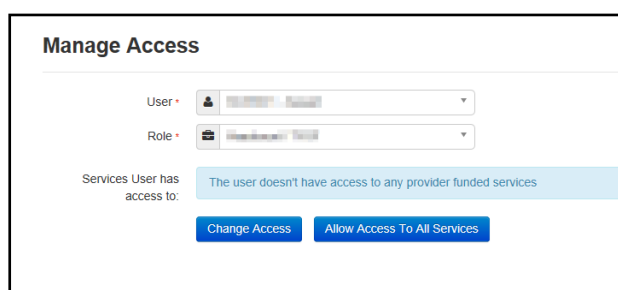
To update access for the selected user:

1. Select **Administration | Manage Access** to display the **Manage Access** page.



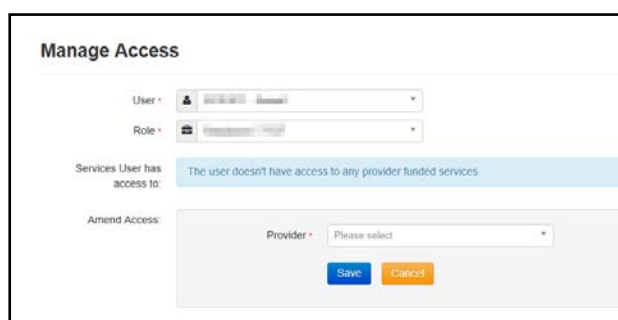
The screenshot shows the 'Manage Access' page with a 'User' dropdown menu set to 'Please select'.

2. Select a **User** to display their **Role** and a list of services to which they have access.



The screenshot shows the 'Manage Access' page with a user selected. Below the 'Role' dropdown, a message states: 'Services User has access to: The user doesn't have access to any provider funded services'. There are two buttons: 'Change Access' and 'Allow Access To All Services'.

3. Click the **Allow Access to All Services** button or click the **Change Access** button to display the **Amend Access** panel.



The screenshot shows the 'Manage Access' page with the 'Amend Access' panel open. It includes a 'Provider' dropdown menu set to 'Please select' and 'Save' and 'Cancel' buttons.

4. Select a **Provider from the drop-down list** to display their services.
5. Select one or more services.
6. Click the **Save** button.

For the Self Update portal there are two separate levels of access:

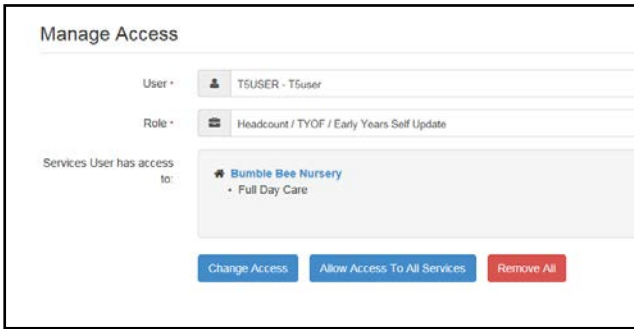
- Providers who need to have access to their services.
- Local Authority Early Years administrators who need to have access to all providers for SUPP management.

Removing Access from a User

To remove a user's access to all services:

1. Select **Administration | Manage Access** to display the **Manage Access** page.

2. Select a **User** to display a list of services to which they have access.



3. Click the **Remove All** button.

Reviewing Users

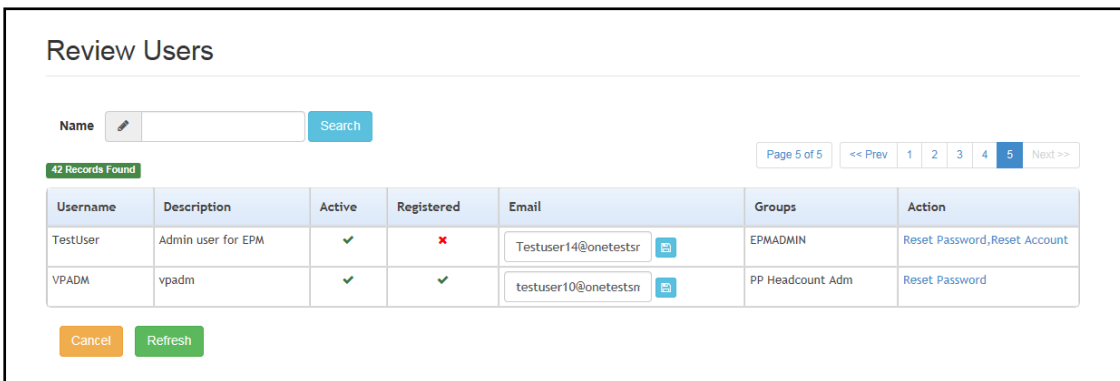
Introduction

The **Review Users** page is used to view the users that are currently registered to use the Provider portal, to update their email address and enable them to update their password. It is also used to reset a user account that is inactive in the v4 Client.

NOTE: When a system administrator logs into the portal, their account is displayed as read-only.

Viewing User Details

1. Select **Administration | Review User** to display the **Review Users** page.



2. If required, enter a partial **User Name**, **Description** or **Email** address and click the **Search** button.

Updating a User Email Address

To update the user's **Email** address:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Enter a new **Email** address and click the adjacent update button.

Resetting a User Password

If a user has forgotten their password, to enable them to reset their password:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Click the **Reset Password** link to send an email to the current **Email** address asking the user to update their password.

NOTE: Clicking the **Reset Password** link displays the **Reset Account** link in the **Action** column until the user resets their password. When the user resets their password, they receive an email to let them know that their password has been changed successfully. The **Reset Account** link is then removed from the screen.

Resetting a User Account

If the user account is set to inactive in the v4 Client, the **Reset Account** link is displayed in the **Action** column and the **Active** status is displayed as a red cross as shown in the following graphic:

Username	Description	Active	Registered	Email	Groups	Action
EPMUSER	EPM user	✘	✔	Testuser17@onetestr	EPMUSERGROUP	Reset Password, Reset Account

To reset an inactive account and set the status to active in the v4 Client:

1. Select **Administration | Review User** to display the **Review Users** page.
2. Click the **Reset Account** link.

NOTE: The **Reset Account** link is also displayed if the user has requested a new password and this has not been reset. For more information, see [Resetting a User Password](#) on page 9

Permissions

Assigning Access to Business Processes

Access is granted to a user group in the One v4 Client:

1. Select **Tools | Permissions | User Group Processes**.
2. Search for the required user group.
3. Highlight the required user group and click the **Select** button.
4. Select **Provider Portal** from the **Main Business Processes** drop-down.
5. Assign the required access to the **Business Processes** for the Self Update Provider portal:

Portal Administration Access

In order to access the **Administration** menu route to manage user accounts and site setup, **Read/Write** access must be assigned to the **General Site Administrator** business process as shown in the following graphic:

Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal		✘		
General Site Administrator		✔		

SUPP Administration Access

In order to administer the Self Update Provider portal, Read/Write access must be assigned to the following business processes:

- Self Update Administration
- Self Update Early Years

as shown in the following graphic:

Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal		✗		
Self Update				✓
Self Update Administration		✓		
Self Update Early Years		✓		

Provider Access

In order to view and update their details, a provider must be assigned Read/Write access to the following business processes:

- Self Update
- Self Update Early Years

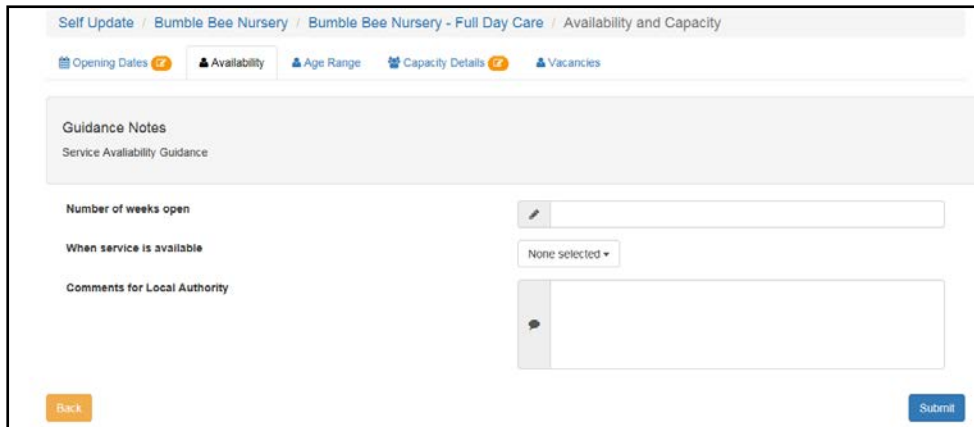
as shown in the following graphic:

Name	Read	Read-Write	Read-Write-Delete	Deny
Provider Portal		✗		
Self Update		✓		
Self Update Administration				✓
Self Update Early Years		✓		

Functionality	Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete
Portal Administration	Provider Portal	General Site Administrator		✓	
Self Update Administration	Provider Portal	Self Update Administration		✓	
		Self Update Early Years		✓	
Self Update Provider User	Provider Portal	Self Update		✓	
		Self Update Early Years		✓	

Guidance Notes

Guidance notes can be added to the top of the Provider Self Update screens so that Local Authority administrators can give instructions to help providers when they are submitting changes for approval.



Updating Guidance Notes

Guidance notes are configured for each screen using the text customisation facility. If no text is saved, the **Guidance Notes** header is not displayed.

1. Select **Administration | Site Setup | Text Customisation** to display the **Text Customisation** page.



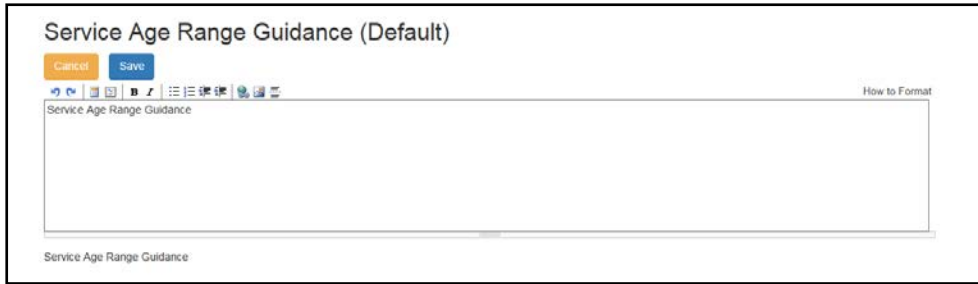
2. Click the drop-down to display a list of available text that can be customised.
3. Scroll to the required list of screens e.g. **Self Update Guidance**.



4. Select the required screen.



5. Click the **Edit** button.



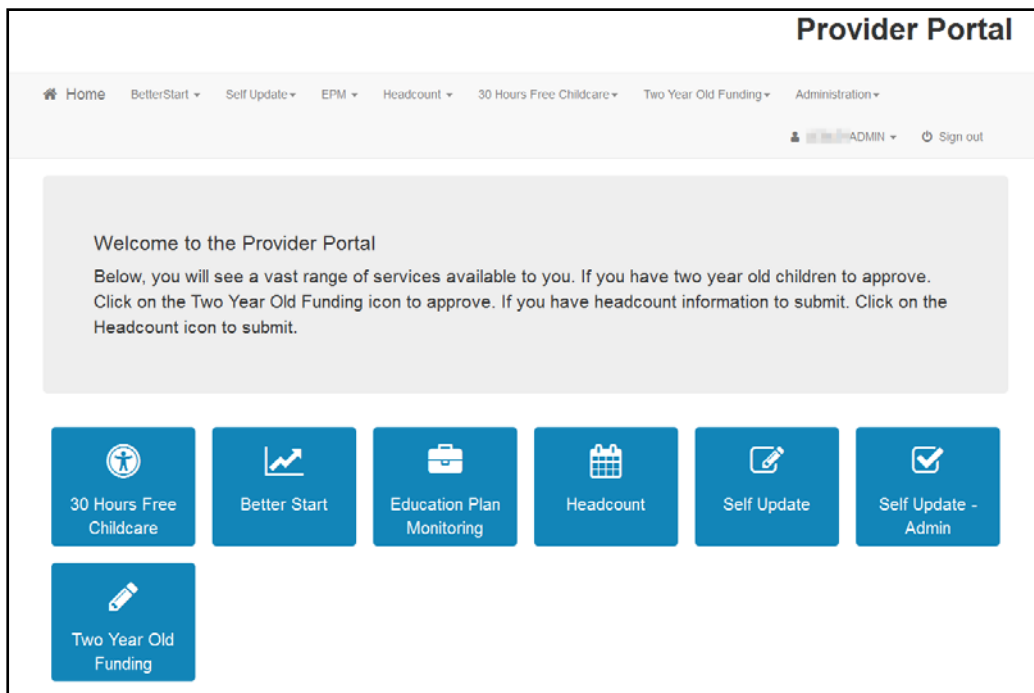
6. Make the required changes and click the **Save** button.

03 / Administering the Self Update Provider Portal

Introduction

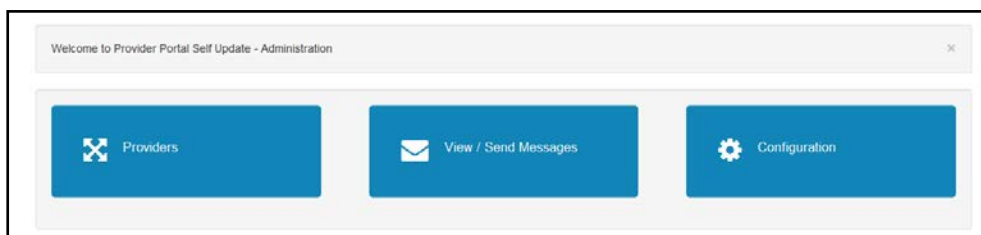
The SUPP administrator can configure the Self Update portal and manage changes to service details submitted by providers.

The Self Update administration area is accessed from the Provider portal home page.



NOTE: The options and menu routes displayed on the home page are subject to permissions. For more information, see [Permissions](#) on page 10.

Click the **Self Update - Admin** tile to display the **Self Update - Administration** page.



This page gives access to:

- Configure the Self Update portal. For more information, see [Configuring the Self Update Portal](#) on page 16.
- Manage changes submitted by providers. For more information, see [Managing Provider Self Updates](#) on page 19.
- Create and send messages to providers. For more information, see [Sending Messages](#) on page 31.

Configuring the Self Update Portal

The **Self Update - General Configuration** page is accessed by clicking the **Configuration** tile on the **Self Update - Administration** page.

Configuration Key	Configuration Value	
Availability And Capacity	<input checked="" type="checkbox"/>	
Consent	<input checked="" type="checkbox"/>	
Travel	<input checked="" type="checkbox"/>	
Costs	<input checked="" type="checkbox"/>	
Facilities	<input checked="" type="checkbox"/>	
Show Early Years Census	<input checked="" type="checkbox"/>	
Review Early Years Census Submissions	<input checked="" type="checkbox"/>	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input checked="" type="checkbox"/>	
Enable email notifications upon Local Authority approval	<input checked="" type="checkbox"/>	
Enable provider users to add services	<input checked="" type="checkbox"/>	
Run a Scheduled Notification Task	<input type="checkbox" value="OFF"/>	

Cancel Save

This page enables the Local Authority to specify:

- Which information can be viewed and updated via the portal. The following information can be viewed and updated by providers if the **Configuration Value** is set to **On**:
 - **Availability and Capacity**: This includes opening dates and times, age ranges, capacity, waiting list and vacancy information.
 - **Consent**: This includes consent to share information about the service.
 - **Travel**: This includes parking spaces, own transport and school pickups.
 - **Costs**: This includes service charges and sibling discount.
 - **Facilities**: The facilities supported by the provider.
- Whether or not the provider can view and update their Early Years Census information via the portal and the Local Authority can view and send a reminder message to providers who have not submitted their census.
- Whether or not the Local Authority can review the census information submitted by the provider and approve or discard the changes. If this is set to **OFF**, the census information submitted by the provider updates the database directly.
- The email address used to receive submission notifications.
- The email address used to send feedback.
- Whether or not email notifications will be sent to the configured email address every time a provider makes a submission.
- Whether or not providers can add a new service for approval.
- Whether or not a scheduled task is run to send the email notifications. For more information, see [Configuring a Scheduled Notification Task](#) on page 17.

Updating the General Configuration

Each **Configuration Key** has a **Configuration Value** which can be updated. If the **Configuration Value** is a button, it can be set to **On** or **Off**.

To update the **Configuration Value**:

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.
2. If required, click the **Configuration Value** button, adjacent to the required **Configuration Key** to change the value.
3. If required and **Enable email notifications upon Provider submission** is set to **On** or **Run a Scheduled Notification Task** is set to **On**, enter an email address in the **Email address for submission notifications** field.
4. Enter an email address in **The self update email address** field. This is the email address used as the **From** address to send email feedback to both the LA and the provider, e.g. this address is used to send an email to the LA when a provider submits a change to their details and is the address used to send an email to the provider when the LA approves a change. For more information, see [Updating Service Details](#) on page 52 and [Approving Provider Updates](#) on page 26.
5. Click the **Save** button.

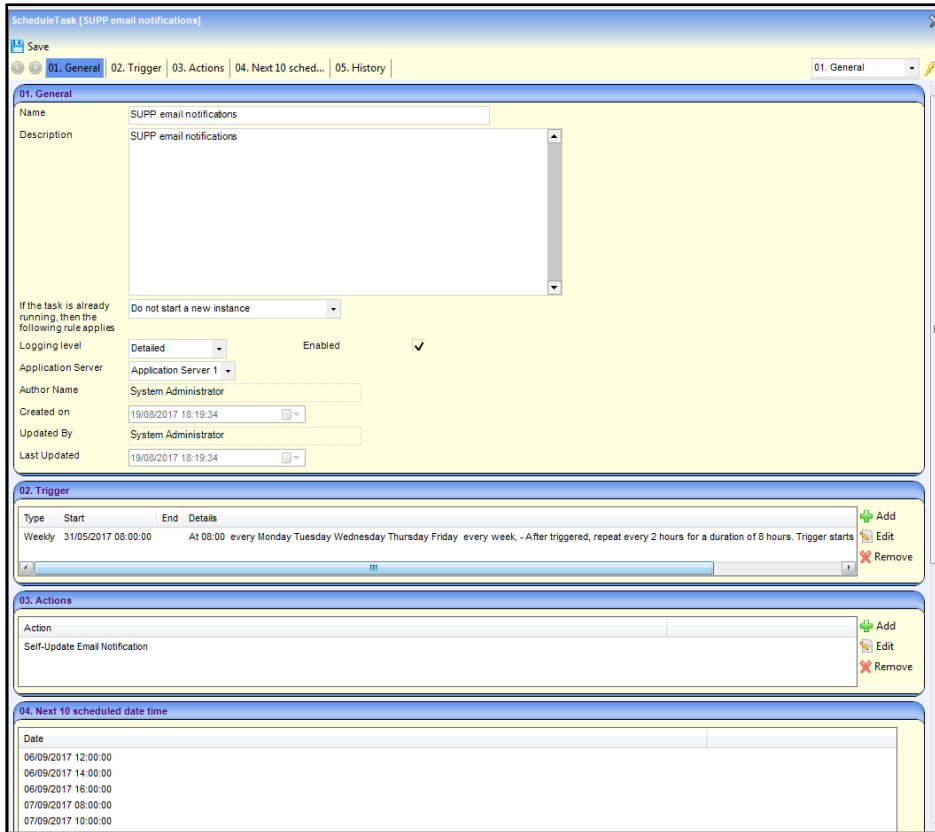
Configuring a Scheduled Notification Task

The Local Authority can choose to configure the portal to run a scheduled task in the background. The scheduled task is triggered at a specified time to send an email to the configured email address if any provider updates have been submitted and are awaiting approval. It can be configured to either send email notifications whenever there are provider updates awaiting approval or to only send email notifications if new updates have been submitted since the last email.

If required, the Local Authority can configure the portal to run the scheduled task instead of sending an email every time a provider submits a single page. Alternatively, the LA can configure the portal to also send email notifications upon provider submission.

An implementation task automatically sets up the scheduled task as defined in the following graphic. The Local Authority can change the configuration of the task in the One v4 Client via **Tools | Administration | Schedule Task**.

Administering the Self Update Provider Portal



More Information: *v4 Scheduled Tasks* technical guide available on My Account and on the One Publications website.

To configure the portal to run a scheduled notification task:

1. Select **Configuration** from the **Self-Update | Admin Self-Update** menu to display the **Self-Update - General Configuration** page.

Configuration Key	Configuration Value	
Availability And Capacity	<input type="checkbox"/> ON	
Consent	<input type="checkbox"/> ON	
Travel	<input type="checkbox"/> ON	
Costs	<input type="checkbox"/> ON	
Facilities	<input type="checkbox"/> ON	
Show Early Years Census	<input type="checkbox"/> ON	
Review Early Years Census Submissions	<input type="checkbox"/> ON	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input type="checkbox"/> ON	
Enable email notifications upon Local Authority approval	<input type="checkbox"/> ON	
Enable provider users to add services	<input type="checkbox"/> ON	
Run a Scheduled Notification Task	<input type="checkbox"/> OFF	

2. Set the **Configuration Value** adjacent to **Run a Scheduled Notification Task** to **On**. The **Configuration Value** of **Send email notifications if there are provider updates awaiting approval** is initially set to **On**.

Self Update - General Configuration		
Configuration Key	Configuration Value	
Availability And Capacity	<input checked="" type="checkbox"/> ON	
Consent	<input checked="" type="checkbox"/> ON	
Travel	<input checked="" type="checkbox"/> ON	
Costs	<input checked="" type="checkbox"/> ON	
Facilities	<input checked="" type="checkbox"/> ON	
Show Early Years Census	<input checked="" type="checkbox"/> ON	
Review Early Years Census Submissions	<input checked="" type="checkbox"/> ON	
Email address for submission notifications	<input type="text" value="SelfUpdateAdminEmail@SelfUpdate.com"/>	
The self update email address	<input type="text" value="SelfUpdateEmail@SelfUpdate.com"/>	
Enable email notifications upon Provider submission	<input checked="" type="checkbox"/> ON	
Enable email notifications upon Local Authority approval	<input checked="" type="checkbox"/> ON	
Enable provider users to add services	<input checked="" type="checkbox"/> ON	
Run a Scheduled Notification Task	<input checked="" type="checkbox"/> ON	
Send email notifications if there are provider updates awaiting approval	<input checked="" type="checkbox"/> ON	
Send email notifications if there are provider updates awaiting approval ONLY IF new updates have been submitted since the last email	<input type="checkbox"/> OFF	

3. If required, set **Send email notifications if there are provider updates awaiting approval ONLY if new updates have been submitted since the last email** to **On**.
4. If required, set **Enable email notifications upon Provider submissions** to **Off**.
5. Click the **Save** button.

Sending Email Notifications

If **Run a Scheduled Notification Task** is set to **On**, an email is sent to the email address specified in the **Email address for submission notifications** field.

The format of the email notification sent is as follows:

Subject: SUPP - notification of submitted Provider updates requiring approval.

You have requested to be notified if there are provider updates awaiting approval [and new updates have been submitted since the last email].

At [time] on [date], there are [nnn] providers awaiting approval.

[nnn] pages from [nnn] providers have been submitted since the previous update.

NOTE: The statement, [and new updates have been submitted since the last email], is omitted from the notification if **Send email notifications if there are provider updates awaiting approval** is set to **On**.

Managing Provider Self Updates

The **Providers - Self Update** page is accessed by clicking the **Providers** tile on the **Self Update - Administration** page. It is used by the Local Authority to view changes submitted by providers using the Self Update portal and decide how to action them. For each of the submissions, the LA can approve, reject, edit or overwrite the changes.

Viewing Provider Self Updates

To view the changes submitted by providers:

1. Select **Admin Home** from the **Self Update** menu to display the **Self Update - Administration** page.

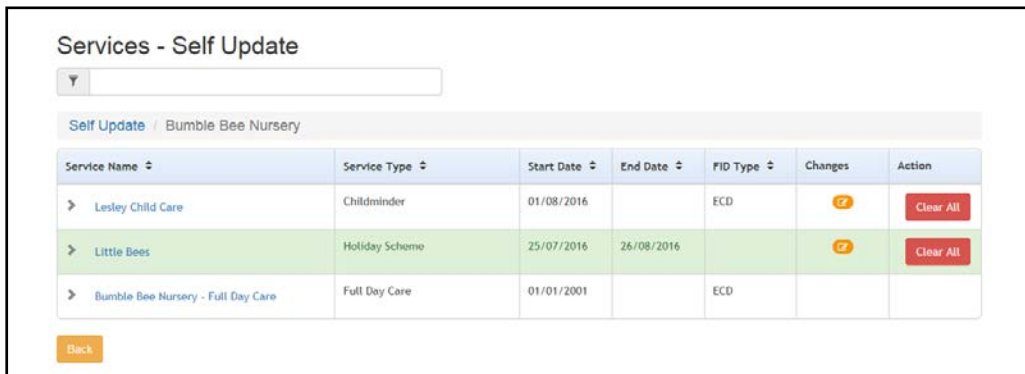
Administering the Self Update Provider Portal

2. Click the **Providers** button to display the **Providers - Self Update** page with a list of providers to which you have access.



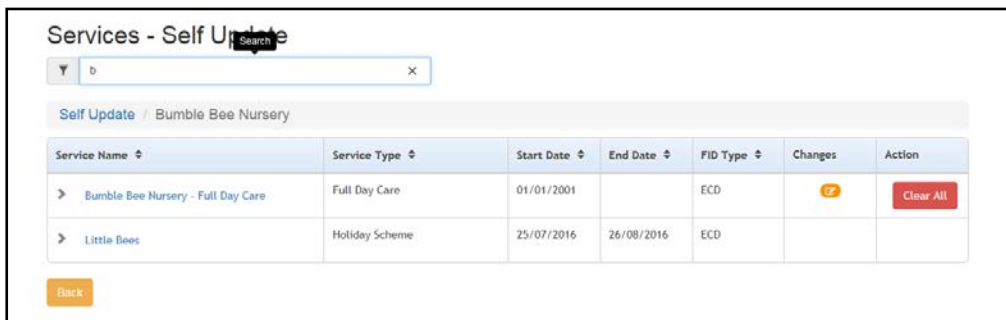
The **Has Changes** check box is automatically selected to display only the providers who have submitted changes. The **Pending changes** icon is displayed in the **Changes** column.

3. If required, enter one or more characters into the search and click the **Search** button to filter the list of providers.
4. Click the required **Provider Name** link to display the **Services - Self Update** page with a list of services at this provider.



The **Pending changes** icon is displayed in the **Changes** column if there are changes for this service.

5. If required, enter one or more characters into the search to automatically filter the list of services.



6. Click the required **Service Name** link to display the **Self Update** page with the **Service Details** tab displayed.

The screenshot shows the 'Self Update' interface for 'Bumble Bee Nursery - Full Day Care'. The 'Consent' tab is active, indicated by a yellow 'Pending changes' icon. The form is divided into two columns: 'Current Values' and 'Values to be approved'. Fields include Service Name, Service Type, Start Date, End Date, Registered For Nursery Education Grant / Funding, Email Address, Web Site, Telephone Number, Fax Number, Address, Ofsted Provision Type, and Other Information. A 'Pending changes' icon is visible on the 'Consent' tab.

The **Current Values** column displays the values currently held in One. The **Values to be approved** column displays the values submitted by the provider. Changes are highlighted and the **Pending changes** icon is displayed next to the field.

The **Pending changes** icon is displayed on the tab if changes to that information are pending approval. The following graphic shows changes pending on the **Consent** tab:

The screenshot shows the 'Self Update' interface for 'Provider - manage Access'. The 'Consent' tab is active, indicated by a yellow 'Pending changes' icon.

7. If required, select the **Consent** tab to view changes to the consent to share information about the service.

Administering the Self Update Provider Portal

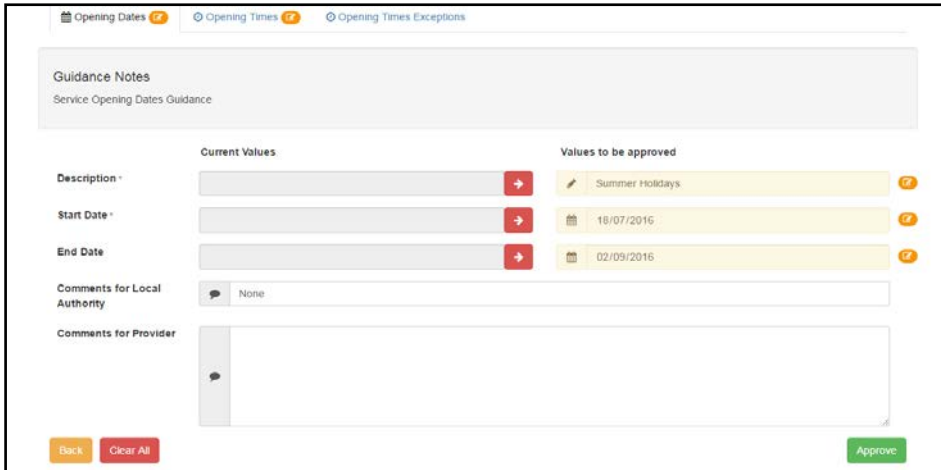
8. If required, select the **Availability and Capacity** tab to view changes to the opening dates, availability, age ranges, capacity and vacancies.

The following graphic shows that there are pending changes to the **Opening Dates** information. The opening date that has changed is highlighted and the pending changes icon is displayed in the **Changes** column.

Description	Start Date	End Date	Pending Change	Clear	Changes
Migrated Data	10/11/2004	10/11/2004			
Summer Holidays	18/07/2016	02/09/2016	Create	Clear All	Changes

To view changes to the opening dates:

- a. Ensure that the **Opening Dates** tab is selected.
- b. Click the link on the **Description** to display the details.

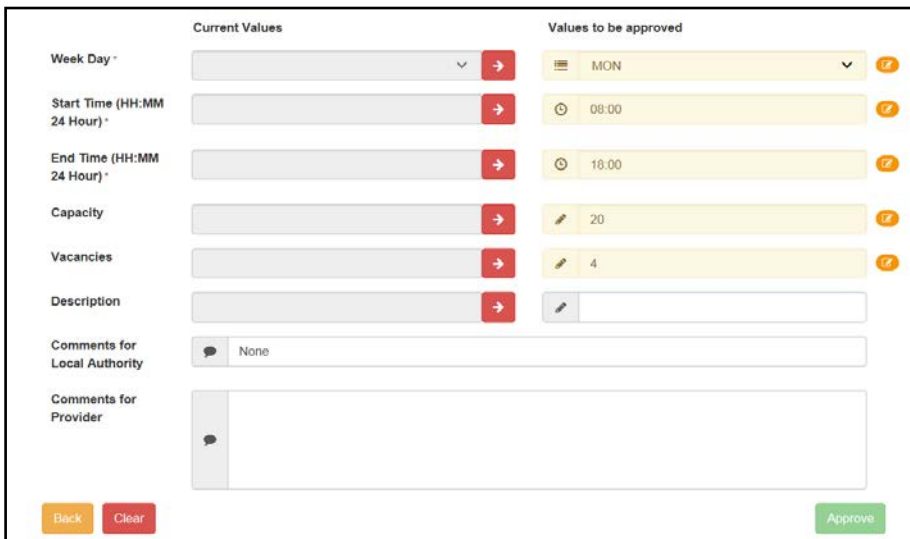


If there are any changes to **Opening Times** or **Opening Times Exceptions**, the pending changes icon is displayed on the tab.

- c. Select the required tab to view the changes.



- d. Click the link for the required change to display **Current Values** and **Values to be approved**.



To view changes to the availability of the service, select the **Availability** tab.

Administering the Self Update Provider Portal

The screenshot shows the 'Availability' tab selected in the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity'. The navigation tabs are 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Guidance Notes' section displays 'Service Availability Guidance'. The main form area is divided into 'Current Values' and 'Values to be approved'. Under 'Current Values', there are fields for 'Number of weeks open', 'When service is available' (set to 'None selected'), 'Comments for Local Authority', and 'Comments for Provider'. Under 'Values to be approved', there are fields for 'Number of weeks open' (set to 50) and 'When service is available' (set to 'All Year'). At the bottom, there are 'Back', 'Clear', and 'Approve' buttons.

To view changes to the minimum and maximum ages and funding at the service, select the **Age Range** tab.

The screenshot shows the 'Age Range' tab selected in the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity'. The navigation tabs are 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Guidance Notes' section displays 'Service Age Range Guidance'. The main form area is divided into 'Current Values' and 'Values to be approved'. Under 'Current Values', there are fields for 'Minimum Age Years', 'Minimum Age Months', 'Maximum Age Years', 'Maximum Age Months', '2 Year Old Funding', '3 Year Old Funding', and '4 Year Old Funding'. Under 'Values to be approved', there are fields for 'Minimum Age Years' (set to 2), 'Minimum Age Months' (set to 4), 'Maximum Age Years' (set to 5), and 'Maximum Age Months' (set to 0). At the bottom, there are 'Back', 'Clear', and 'Approve' buttons.

To view changes to the capacity, vacancy and waiting list information for the service, select the **Capacity Details** tab.

To display changes to capacity information for one or more age ranges, select the **Age List** tab.

Age Range	Waiting List	Vacancies	Capacity	Pending Change	Clear	Changes
Age 3	5		20	Create	Clear All	

If there are any changes for a particular **Age Range**, the pending changes icon is displayed in the **Changes** column. To display the changes, click the **Age Range** link.

To view changes to the vacancies at the service, select the **Vacancies** tab.

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Guidance Notes
Service Vacancy Guidance

	Current Values	Values to be approved
Contact For Vacancies	<input type="text"/>	<input checked="" type="checkbox"/>
Immediate Vacancies	<input type="text"/>	<input checked="" type="checkbox"/>
Waiting List	<input type="text"/>	<input checked="" type="checkbox"/>

Comments for Local Authority: None

Comments for Provider:

Back Clear Approve

Approving Provider Updates

Changes submitted by providers need to be approved by the Local Authority before the One database is updated.

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the registered email addresses of all Provider portal users who have made a submission. The From email address for the email is set via **The self update email address** option. For more information, see [Configuring the Self Update Portal](#) on page 16.

The email contains the following information:

Your request to *[Create/Update/Delete]* *[Submission area e.g. Consent]* for *[Service name]* at *[Provider name]* has been reviewed.

[Comments for Provider]

To view the information held *[Service name]* at *[Provider name]*, please visit Self Update on the Provider Portal.

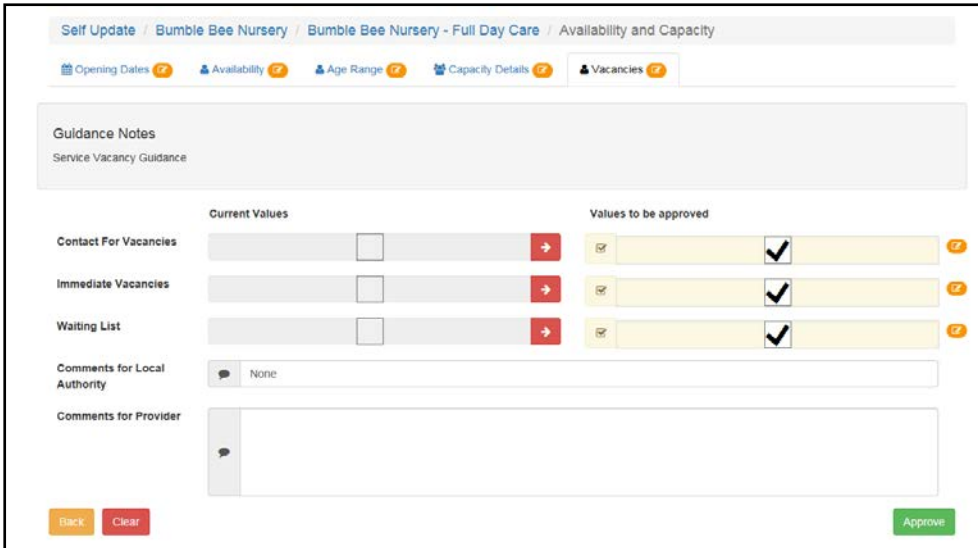
NOTE: The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the **Self Update On Approve Email Template** page via **Provider Portal | Administration | Site Setup | Message Templates**. For more information, see [Message Templates](#) on page 5.

To approve the proposed updates:

1. View the updates submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 19.

The **pending changes** icon is displayed on a tab if changes to that information are pending approval.

2. Select the required tab.



The fields highlighted in the **Values to be approved** column are changes submitted by the provider.

NOTES: If the provider has submitted a new address for the service which is not on the One database, the address is flagged as **New**. This address must be added to the One database via the v4 Client before the change can be approved.

3. If required, click the arrow adjacent to the **Current Value** to overwrite one or more changes with the current value in the One database. For more information, see [Overwriting Provider Updates](#) on page 27.
4. To approve the changes and update the value in the One database, click the **Approve** button.

NOTE: If the provider has deselected the **Offers Extended Childcare** check box and extended hours have been recorded for the current term, when this change is approved it only affects the next term with no extended hours recorded. If there is no future term defined, the following message is displayed: *Either remove the extended hours within the <Term Name> or define the future period.*

Overwriting Provider Updates

The Local Authority can overwrite the values submitted by the provider with those currently held in the One database. Alternatively, you can clear all of the changes on that tab.

To overwrite provider updates:

1. View the changes submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 19.

The screenshot shows the 'Self Update' interface for 'Bumble Bee Nursery - Full Day Care' in 'Summer'. The 'Opening Dates' tab is active, showing a table with 'Current Values' and 'Values to be approved'. The 'Current Values' column has empty input fields for Description, Start Date, and End Date, each with a red arrow button. The 'Values to be approved' column shows 'Summer', '24/07/2017', and '25/08/2017' with edit icons. Below the table are text boxes for 'Comments for Local Authority' (containing 'None') and 'Comments for Provider'. At the bottom are 'Back', 'Clear All', and 'Approve' buttons.

	Current Values	Values to be approved
Description*	<input type="text"/>	Summer
Start Date*	<input type="text"/>	24/07/2017
End Date	<input type="text"/>	25/08/2017
Comments for Local Authority	<input type="text" value="None"/>	
Comments for Provider	<input type="text"/>	

2. Click the arrow adjacent to the **Current Value** to overwrite the value in the **Value to be approved** column.
Alternatively, to clear all changes on the tab, click the **Clear** button.
3. To approve the remaining changes, if any, click the **Approve** button.

Editing Provider Updates

The Local Authority can edit the information before approving the changes.

1. View the updates submitted by a provider. For more information, see [Viewing Provider Self Updates](#) on page 19.

2. If required, make changes to the information in the **Values to be approved** column.
3. If required, select a different address for the service:
 - a. Click the **Select** button to display the **Search Addresses** dialog.

- b. Enter search criteria and click the **Find Address** button to display a list of matching addresses.
- c. Select the required address.

Alternatively, if the required address is not found, click the **Show Full Address** link to display the address fields and enter the address manually.

NOTE: A new address must be added to the One database via the v4 Client before the change can be approved.

- To approve the changes and update the **Current Values** column, click the **Approve** button.

Rejecting Provider Updates

The Local Authority can reject all changes made to the service details by a provider and set the values back to the One values. Alternatively, they can reject all changes on a particular tab.

- Select **Admin Home** from the **Self Update** menu to display the **Self Update - Administration** page.
- Click the **Providers** button to display the **Providers - Self Update** page with a list of providers to which you have access.

The **Has Changes** check box is automatically selected to display only the providers who have submitted changes.

- If required, enter one or more characters into the search to automatically filter the list of providers.
- Click the required **Provider Name** link to display the **Services - Self Update** page with a list of services at this provider.

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
Lesley Child Care	Childminder	01/08/2016		ECD	P	Clear All
Little Bees	Holiday Scheme	25/07/2016	26/08/2016		P	Clear All
Bumble Bee Nursery - Full Day Care	Full Day Care	01/01/2001		ECD		

The **Pending changes** icon is displayed in the **Changes** column and the **Clear All** button is displayed in the **Action** column if there are pending changes for this service.

- To reject all the proposed changes for this service, click the **Clear All** button.

Alternatively, to reject proposed changes on a particular tab:

- Click the **Service Name** link to display the details.
- Select the required tab.

Self Update / Bumble Bee Nursery / Bumble Bee Nursery - Full Day Care / Availability and Capacity

Opening Dates P Availability P Age Range P Capacity Details P Vacancies P

Guidance Notes
Service Vacancy Guidance

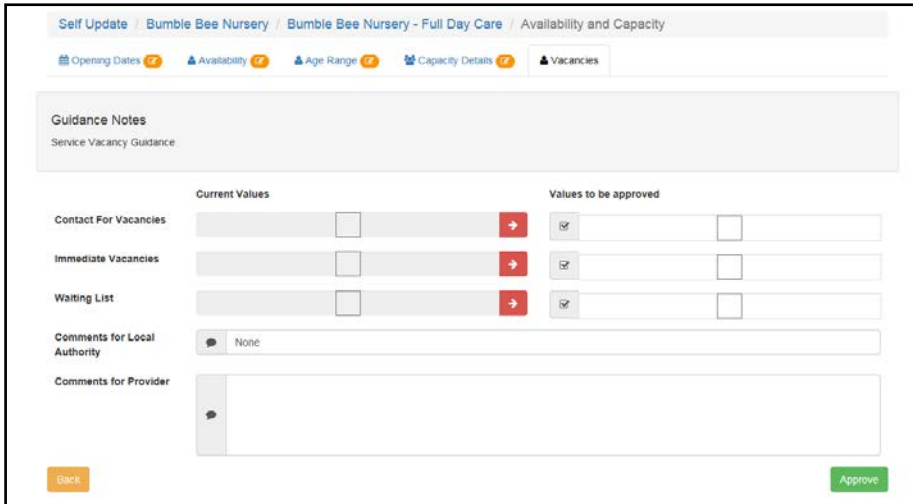
	Current Values	Values to be approved
Contact For Vacancies	<input type="text"/>	<input checked="" type="checkbox"/>
Immediate Vacancies	<input type="text"/>	<input checked="" type="checkbox"/>
Waiting List	<input type="text"/>	<input checked="" type="checkbox"/>

Comments for Local Authority
None

Comments for Provider

Back Clear Approve

- Click the **Clear** button to clear the changes.



Sending Messages

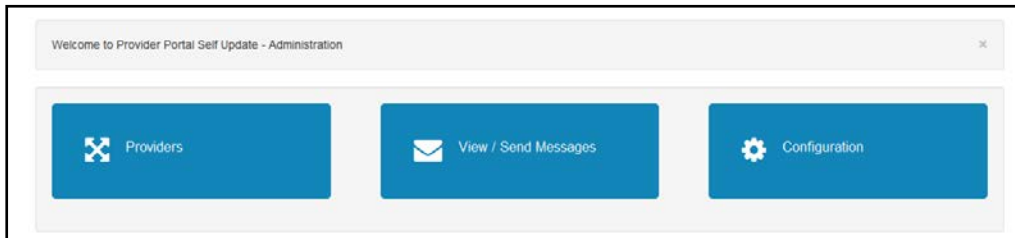
Introduction

The **Self Update | Messages** menu route enables the Local Authority Early Years administrator to compose messages to Self Update users and to view a log of messages sent.

NOTE: A reminder message can be sent to providers who have not submitted their census information. If the local authority has configured the portal so that **Show Early Years Census** is set to **ON**, you can filter the list of providers to display only those that have or have not submitted their census.

For more information about configuring the Self Update portal, see [Configuring the Self Update Portal](#) on page 16.

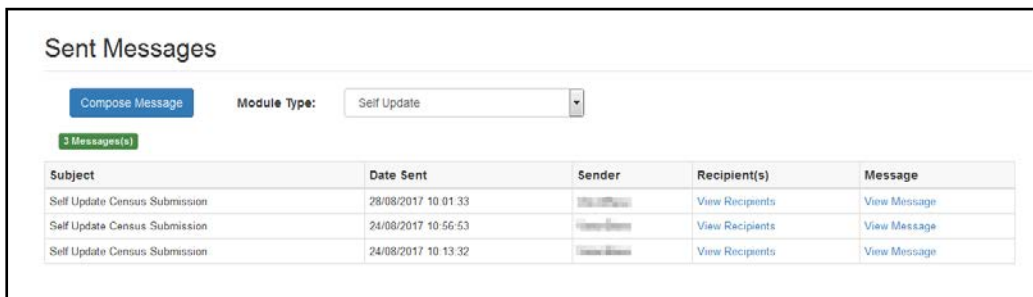
The **View / Send Messages** tile is displayed on the Self Update Administration welcome page.



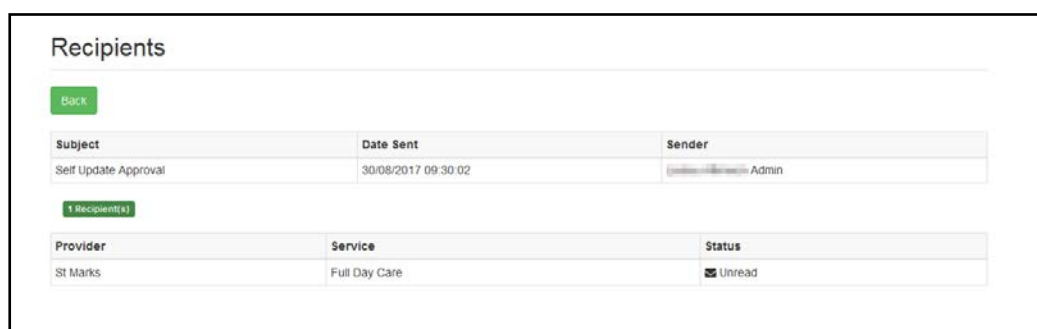
Viewing Sent Messages

A list of messages sent to Self Update users is displayed when the Early Years administrator clicks the **View / Send Messages** tile or selects **Messages** from the **Self Update** menu.

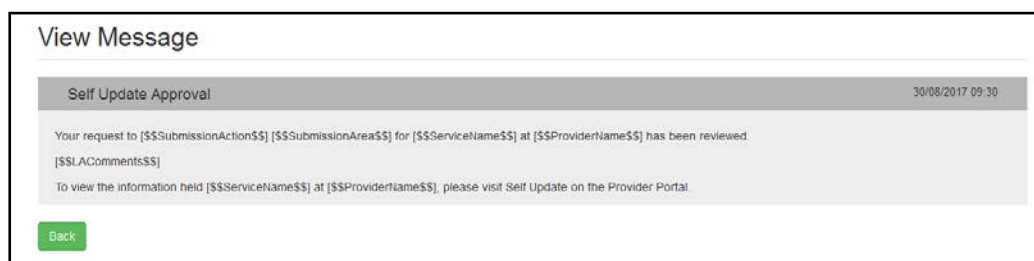
1. Select **Messages** from the **Self Update** menu to display the **Sent Messages** page. The **Module Type** drop-down defaults to **Self Update**.



- To view the message, click the **View Message** link to display the **View Message** page.



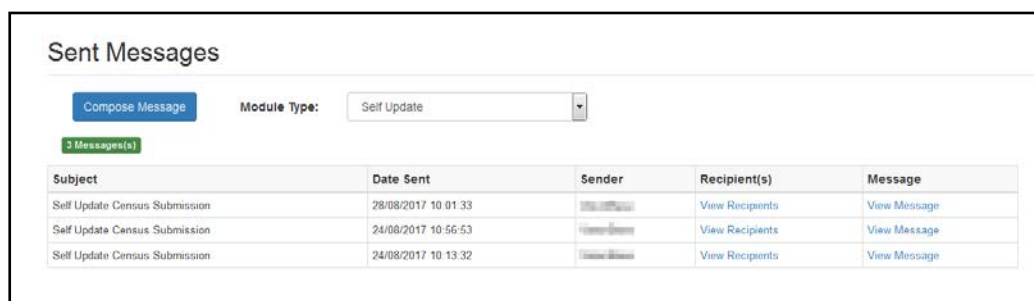
Alternatively, to view the recipients of a message, click the **View Recipients** link to display the **Recipients** page.



Composing a New Message

To compose and send a new message to a service provider, the Early Years administrator clicks the **View / Send Messages** tile or selects **Messages** from the **Self Update** menu.

- Select **Messages** from the **Self Update** menu to display the **Sent Messages** page. The **Module Type** drop-down defaults to **Self Update**.



- Click the **Compose Message** button to display the **Compose New Message** page.

3. Click the **To** button to display the **Select Message Recipients** dialog.

Provider	Service	EY Census Submitted	Funding Type	Service Type
		Please select	Please select	Please select

NOTE: The **EY Census Submitted** column is only displayed if **Show Early Years Census** is set to **ON** on the **Self Update - General Configuration** page.

4. Enter a full or partial provider or service **Name** and click the **Search** button to display a list of matching services in the **Search Results**. Alternatively, select a service group from the **Service** drop-down. Refine the search further by applying an **EY Census Submitted** status, **Funding Type** or **Service Type** filter.

Select Message Recipients

Name Search

Page 1 of 111 1 2 3 4 5 > 111 Next >>

Search Results
1104 Service(s)

Provider	Service	EY Census Submitted	Funding Type	Service Type	
<input type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Provider Service	No	Funded (T)	Childminder
<input type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Service2	No	Funded (T)	Combined Nursery Centre
<input type="checkbox"/>	ARCDEL Provider2	ARCDEL Service1	No	Funded (T)	Breakfast Clubs
<input type="checkbox"/>	Broadmead Lower School	Maintained Nursery Schools/Cla	No	Funded (T)	Maintained Nursery Schools/Cla
<input type="checkbox"/>	Carealot Day Nursery	Weekend Nursery school	No	Funded (T)	Private Nursery School
<input type="checkbox"/>	Church End Lower School	Full Day Care	No	Funded (T)	Full Day Care
<input type="checkbox"/>	Deborah Green Childcare	Dawn til Dusk	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1343]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1344]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9646]	EY_SERVICE[2696]	No	Funded (T)	Childminder

Add All Remove All

Selected Services
0 Service(s)

There are no selected services.

Cancel Clear Continue

NOTES: To send a reminder message to providers who have not submitted their census, select all services for that provider.

If the provider clicks the **No Changes Required** button, the **EY Census Submitted** status is set to **Yes**.

- Select one or more services to display the service name in the **Selected Services** box, or click the **Add All** button to select all of the services found.

Select Message Recipients

Name Search

Page 1 of 111 1 2 3 4 5 > 111 Next >>

Search Results
1104 Service(s)

Provider	Service	EY Census Submitted	Funding Type	Service Type	
<input checked="" type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Provider Service	No	Funded (T)	Childminder
<input checked="" type="checkbox"/>	ARCDEL Provider1	ARCDEL INTG Service2	No	Funded (T)	Combined Nursery Centre
<input checked="" type="checkbox"/>	ARCDEL Provider2	ARCDEL Service1	No	Funded (T)	Breakfast Clubs
<input type="checkbox"/>	Broadmead Lower School	Maintained Nursery Schools/Cla	No	Funded (T)	Maintained Nursery Schools/Cla
<input type="checkbox"/>	Carealot Day Nursery	Weekend Nursery school	No	Funded (T)	Private Nursery School
<input type="checkbox"/>	Church End Lower School	Full Day Care	No	Funded (T)	Full Day Care
<input type="checkbox"/>	Deborah Green Childcare	Dawn til Dusk	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1343]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9621]	EY_SERVICE[1344]	No	Funded (T)	Childminder
<input type="checkbox"/>	EY_BASE[9646]	EY_SERVICE[2696]	No	Funded (T)	Childminder

Add All Remove All

Selected Services
3 Service(s)

ARCDEL Provider2 - ARCDEL Service1 - ARCDEL Provider1 - ARCDEL INTG Service2 - ARCDEL Provider1 - ARCDEL INTG Provider Service

Cancel Clear Continue

- After selecting all required recipients, click the **Continue** button to display the **Compose New Message** dialog.

7. Select a message **Template** to automatically complete the **Subject** and the **Message**. If required, edit the text in these fields.

8. If required, click the **Browse** button to select an **Attachment**.
9. Click the **Send** button to send the message and display the **Message Sent** dialog.

10. Click the **OK** button to display the **Sent Messages** page.

Administering the Self Update Provider Portal

Sent Messages

[Compose Message](#) **Module Type:**

4 Message(s)

Subject	Date Sent	Sender	Recipient(s)	Message
Self Update Approval	30/08/2017 09:30:02	County of Riverside Admin	View Recipients	View Message
Self Update Census Submission	28/08/2017 10:01:33	[Redacted]	View Recipients	View Message
Self Update Census Submission	24/08/2017 10:56:53	[Redacted]	View Recipients	View Message
Self Update Census Submission	24/08/2017 10:13:32	[Redacted]	View Recipients	View Message

04 / Using the Self Update Provider Portal

Introduction

This chapter describes how the Early Years provider uses the Self-Update portal to view and update the information held about their services in the One v4 Client.

If they are new to the Provider portal, the user needs to activate their user account using the login details sent to them by the One administrator. If they are already a Provider portal user, they can log in as normal.

Activating a Portal User Account

A new Provider portal user needs to activate their user account.

When the user first logs in with their user name and initial password, they are informed that an activation email has been sent to them and that they must click on the activation link in the email to verify their email address. The user must:

1. Click on the unique link contained in the email.
2. Enter their user name and original password.

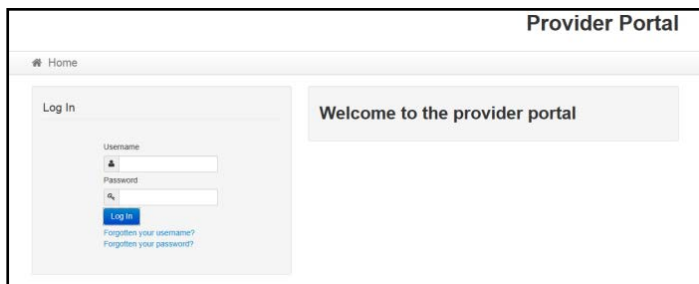
They are prompted to change their password and, if second factor authentication is enabled, to select a secret question and supply an answer.

More Information:

For more information regarding user setup and permissions, refer to the Technical Guide: *Deploying and Configuring the One Provider Self Service Portal for Local Authorities*, which is available on [My Account](#) and on the One Publications website.

Logging into the Portal

A user with an active user account can log into the portal.



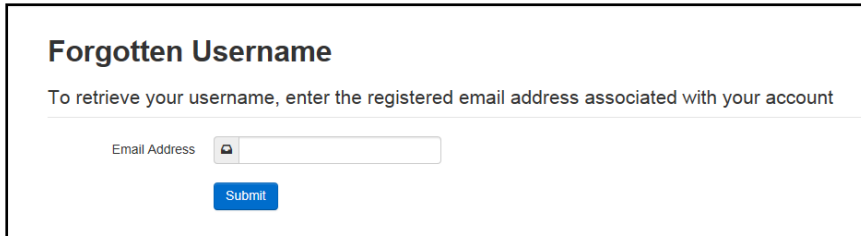
Enter **User name** and **Password** and click the **Log In** button to display the **Secret Question** page.

NOTE: The **Secret Question** page is only displayed if second factor authentication is enabled by the system administrator via **Administration | Site Setup | Configuration**.

Retrieving Your User Name

If you forget your user name:

1. From the portal **Log In** screen, click the **Forgotten your username?** link to display the **Forgotten Username** page.

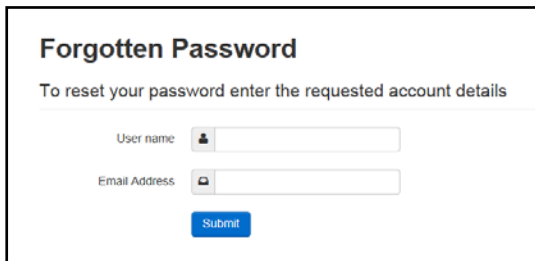


2. Enter your registered **Email Address** and click the **Submit** button.
3. Access your registered email account and open the email received to retrieve your user name.

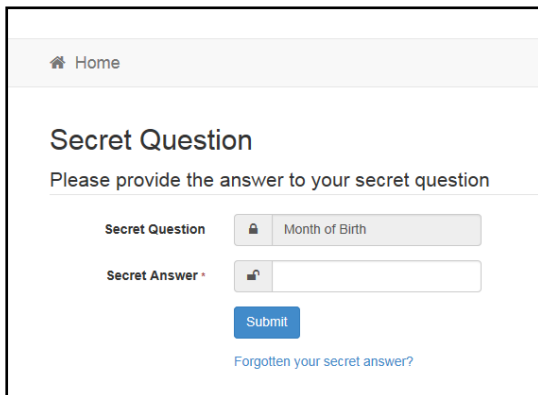
Resetting Your Portal Password

To reset your password:

1. From the portal **Log In** screen, click the **Forgotten your password?** link to display the **Forgotten Password** page.



2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. If second factor authentication is enabled, enter the **Secret Answer** and click the **Submit** button.



4. Access your registered email account and open the email received.
5. Follow the instructions in the email to reset your password.

Resetting Your Secret Question

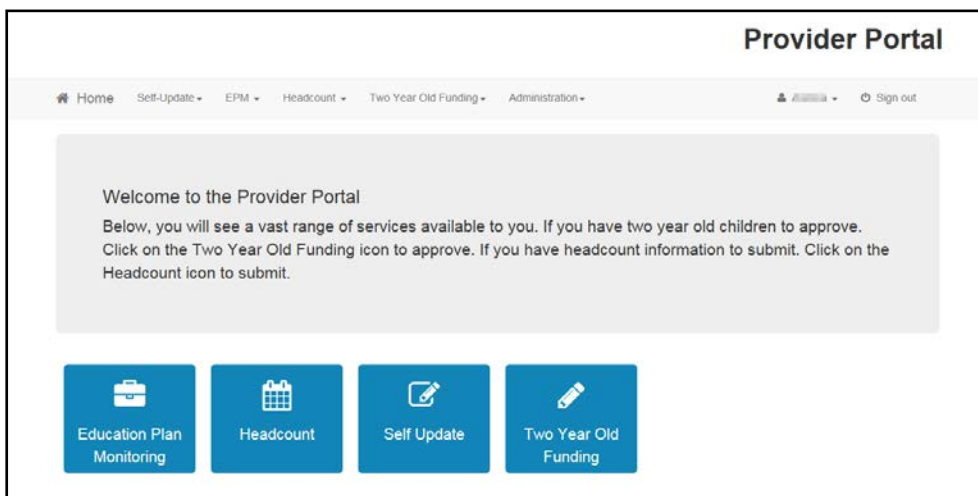
If you need to reset your secret question:

1. From the portal **Secret Question** screen, click the **Forgotten your secret answer?** link.

2. Enter your **User name** and registered **Email Address** and click the **Submit** button.
3. Follow the reset instructions in the email.

Accessing the Self Update Portal

The Provider portal home page gives access to the Self Update portal.



When a provider logs on to the Provider portal, the **Self Update** tile and the **Self Update | Provider Home** menu route are displayed on their Welcome page.

Setting Up Two Step Verification

Introduction

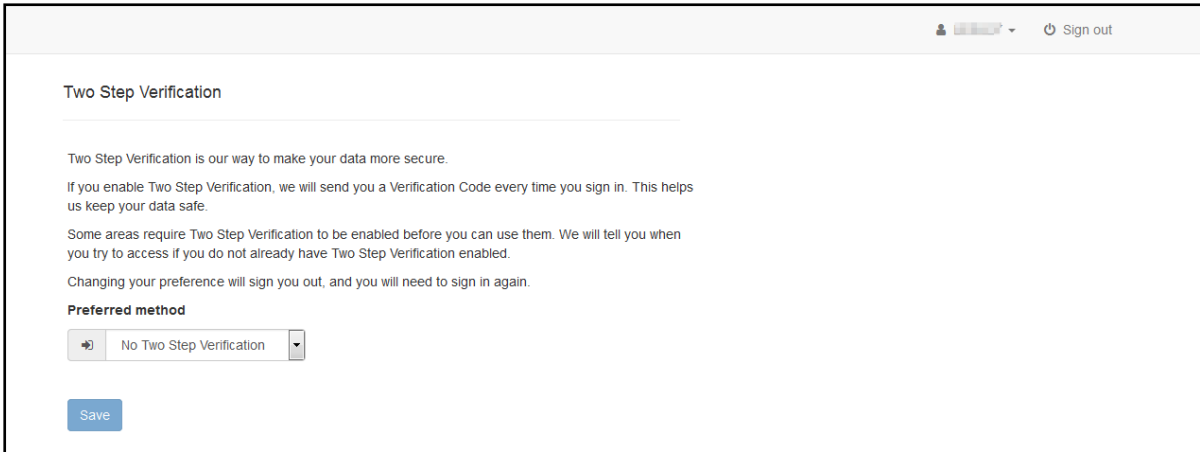
If two step verification is enabled, you will be sent a verification code every time you sign in.

If two step verification is not enabled, a message is displayed when you log into the Provider portal with a link to enable it if you want to.

Enabling Two Step Verification

To enable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.

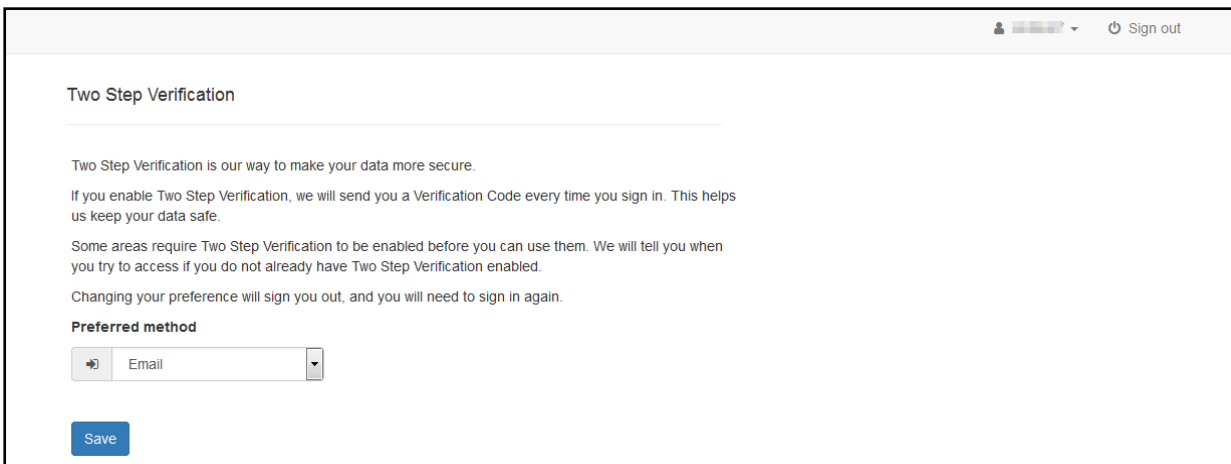


2. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
3. Click the **Save** button.
You will be signed out and will need to sign in again.

Disabling Two Step Verification

To disable two step verification:

1. Select **Two Step Verification** from the username drop-down to display the **Two Step Verification** screen.



2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.
You will be signed out and will need to sign in again.

Viewing and Updating Census Details

Introduction

The Local Authority runs a routine each year in the v4 Client to generate the Early Years Census and pre-populate the census details. The details can be updated in the v4 Client, or the Early Years provider can update the details themselves using the Self Update portal.

NOTE: For the provider to enter and update the census details, the Local Authority must set the **Show Early Years Census** configuration value to **On** via the configuration screen. For more information, see [Configuring the Self Update Portal](#) on page 16.

The Local Authority can send a message via the portal to those providers who have not submitted their census. If there are no changes, the provider clicks the **No Changes Required** button.

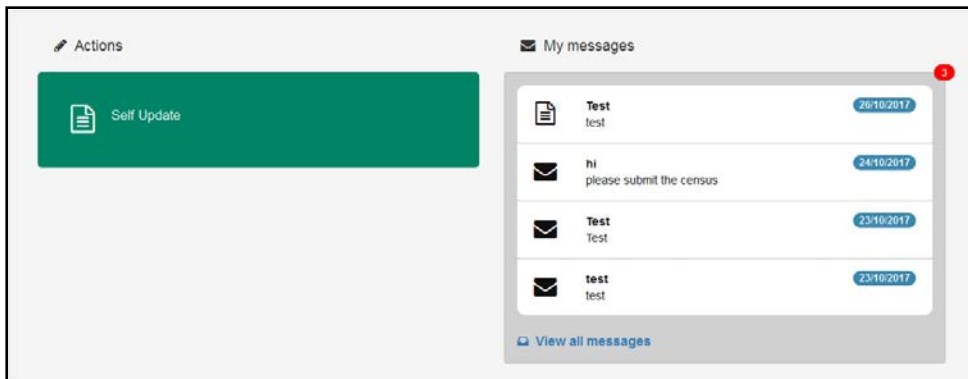
More Information: *Early Years Census Return* reference guide available on My Account and on the One Publications website.

The provider can update the following census details using the Self Update portal:

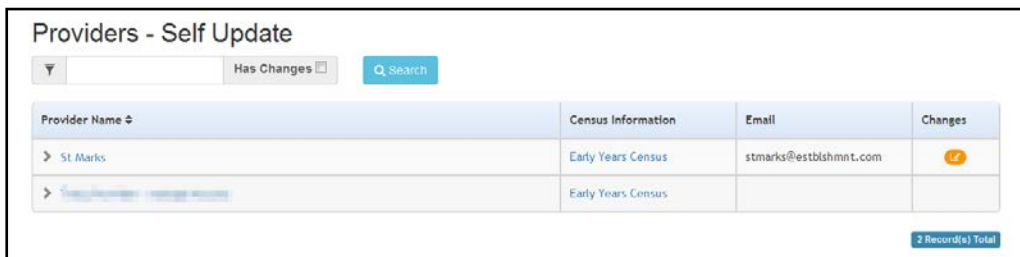
- Availability and opening hours.
- Staff summary details - the number of staff with particular qualifications.
- Summary of children in funded places for each age group.

The provider can save their changes and continue to update the information until they are ready to submit it.

1. Select the **Self Update** tile on the Welcome page to display the available **Actions** and any messages that have been sent from the Local Authority to the provider.



2. Select the **Self Update** action to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see [Managing User Accounts](#) on page 6.



3. If required, enter one or more characters into the search and click the **Search** button.
4. Click the **Early Years Census** link to display the current census details held for the provider.

NOTE: The link is only displayed if the Local Authority has pre-populated the census, the provider has the **Registered for Nursery Education Grant/Fund** check box selected for at least one service in the v4 Client and the **Show Early Years Census** configuration value is set to **On** via the **Self Update - General Configuration** page.

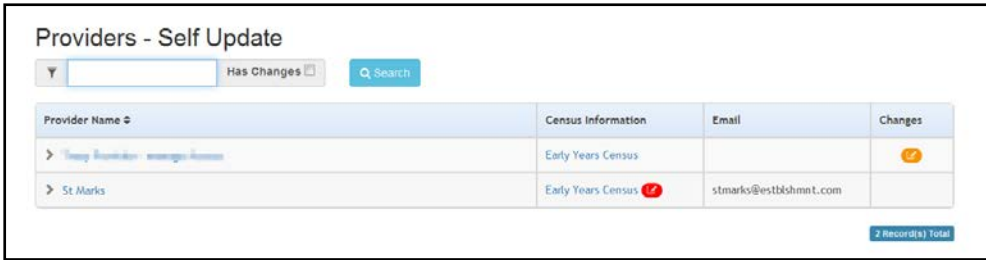
Using the Self Update Provider Portal

The screenshot displays the 'Self Update' portal for 'St Marks' under the 'Early Years Census' section. The page title is 'Guidance Notes' with a sub-heading 'Early Years Census 2018 Details'. The form is organized into three main sections:

- Availability and Opening Times:** This section contains 15 rows of input fields for opening and closing times for each day of the week (Monday through Sunday) and a 'Continuously Open' checkbox. The current values are: No. of Funding Weeks: 38; No. of Weeks Open: 50; Monday opening time: 09:30; Monday closing time: 17:30; Tuesday opening time: 09:30; Tuesday closing time: 17:30; Wednesday opening time: 09:30; Wednesday closing time: 17:30; Thursday opening time: 09:30; Thursday closing time: 17:30; Friday opening time: 09:30; Friday closing time: 17:30; Saturday opening time: 09:30 (24hr); Saturday closing time: 17:30 (24hr); Sunday opening time: 09:30 (24hr); Sunday closing time: 17:30 (24hr); Continuously Open: unchecked.
- Total Staff Information:** This section contains 7 rows of input fields for staff counts. The current values are: Total Number of Staff: 1; Level 2 Qualification: 0; Level 3 Qualification - Non-managerial: 0; Level 3 Qualification - Managerial: 0; Qualified Teacher Status: 1; Early Years Professional Status: 0; Early Years Teacher Status: 0.
- Number of Children By Age:** This section contains 3 rows of input fields for children counts. The current values are: Number of 2 year olds: 3; Number of 3 year olds: 4; Number of 4 year olds: 2. Below these is a text area for 'Comments for Local Authority'.

At the bottom of the form, there are three buttons: 'Back' (orange), 'No Changes Required' (green), and 'Save Draft' (blue). A 'Submit' button is also visible at the bottom right.

5. If required, update the census details.
Alternatively, if no changes are required:
 - a. Click the **No Changes Required** button.
 - b. Click the **Yes** button to confirm.
6. To save the changes without submitting them, click the **Save Draft** button to display the **Providers - Self Update** page with an icon in the **Census Information** column to indicate that the census has been updated but not submitted, as shown in the following graphic:



To view the changes and make further updates, click the **Early Years Census** link.

7. To submit the changes, click the **Submit** button to display a verification message.
8. Click the **Yes** button to confirm.

NOTES: If the provider selects (ticks) the **Continuously Open** check box, any opening and closing times entered are cleared and the fields are disabled.

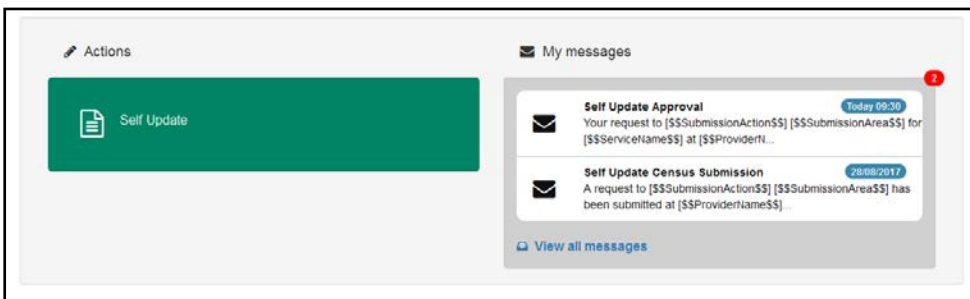
When the provider clicks the **Yes** button to confirm the changes, if the configuration value for **Review Early Years Census Submissions** is set to **On**, the pending changes icon is displayed on the **Providers - Self Update** page and the Local Authority needs to approve the changes. If the configuration value is set to **Off**, the changes are immediately saved in the database.

The provider can make changes to the census details after submitting them as long as the census window is still open (**Show Early Years Census** configuration value is set to **On**).

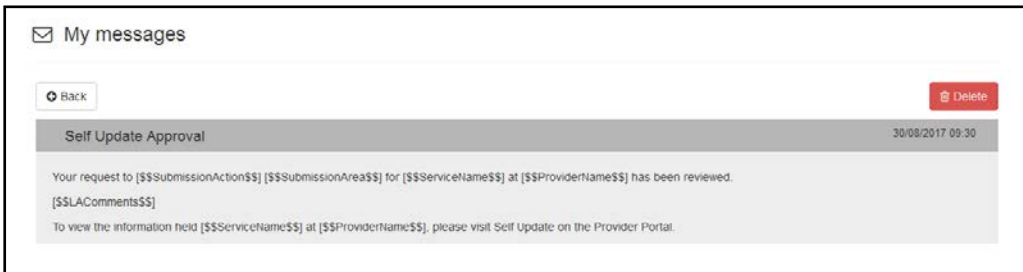
For more information, see [Configuring the Self Update Portal](#) on page 16.

Viewing Sent Messages

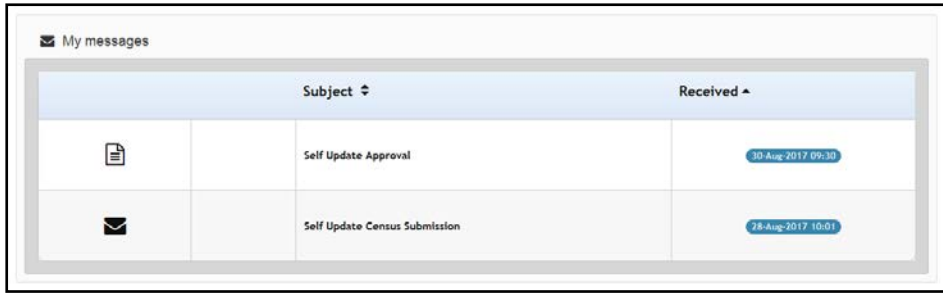
When the provider clicks the **Self Update** tile on the Welcome page, any messages sent to them are displayed in the **My Messages** panel.



To view the details, select a message to display the **My Messages** page.



Alternatively, to view a list of messages, click the **View all messages** link.



If required, click a heading to sort the list.

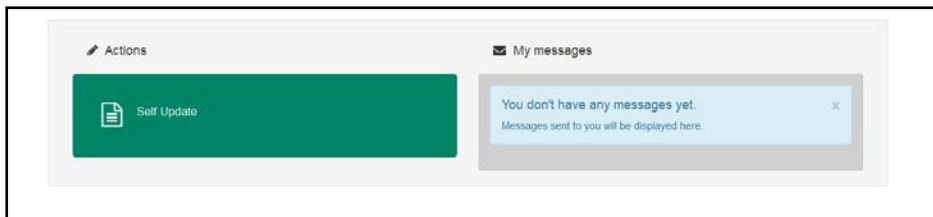
Viewing Service Details

Providers can use the Self Update portal to view the details held about their services. The Local Authority can use the Self Update Configuration page to determine which information is displayed. For more information, see [Configuring the Self Update Portal](#) on page 16.

Viewing Providers and Services

To view the details currently held about your services:

1. Select the **Self Update** tile on the Welcome page to display the available **Actions** and any messages that have been sent.



2. Select the **Self Update** tile to display the **Providers - Self Update** page with a list of providers to which you have access. For information about managing access to services, see [Managing User Accounts](#) on page 6.

NOTE: If you only have access to one provider, the **Services - Self Update** page is displayed with a list of services at that provider.



3. If required, enter one or more characters into the search and click the **Search** button to filter the list.
4. Click the link for the required provider to display the **Services - Self Update** page with a list of services for this provider.

Services - Self Update

Self Update / St Marks

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
St Marks - Full Day Care	Full Day Care	06/07/2007		ECD		Clear All

[Back](#) [Add Service](#)

NOTE: If the required service is not listed, it can be added by clicking the **Add Service** button. For more information, see [Adding a Service](#) on page 70.

Viewing Service and Consent Details

NOTE: The **Consent** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 16.

To view service and consent details for a provider:

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 44.
2. Click the link for the required service to display the **Service Details** tab.

Self Update / St Marks / St Marks - Full Day Care

Service Details Consent Availability and Capacity Travel Costs Facilities

Guidance Notes
Service Guidance

Service Name: St Marks - Full Day Care

Service Type: Full Day Care

Start Date: 06/07/2007

End Date:

Registered For Nursery Education Grant / Funding:

Email Address:

Web Site:

Telephone Number:

Fax Number:

Address: 17, Prebend Street, [Select](#)

Ofsted Provision Type: Childcare - Domestic Premises

Offers Extended Childcare:

Other Information:

Comments for Local Authority:

[Back](#) [Submit](#)

3. If required, select the **Consent** tab to display the consent to share information about the service.

Self Update / St Marks / St Marks - Full Day Care

Service Details | **Consent** | Availability and Capacity | Travel | Costs | Facilities

Guidance Notes
Service Consent Guidance

Consent to publish details to FID

Reason for not publishing details

Consent to share cost details

Consent to share telephone numbers

Consent to share address details

Consent to be contacted by email

Consent to be contacted by telephone

Consent to be contacted by post

Signature provided

Comments for Local Authority

Back Submit

Viewing Availability and Capacity

NOTE: The **Availability and Capacity** tab is only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 16.

To view the current availability and capacity details held for the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 45.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates | **Availability** | Age Range | Capacity Details | Vacancies

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			

Back Add Opening Date

2. To view opening dates, click the link for the required record to display the **Opening Dates**, **Opening Times** and **Opening Times Exceptions**.

For more information, see [Viewing Opening Dates, Times and Exceptions](#) on page 49.

- To view the information held about the number of weeks and when the service is available, select the **Availability** tab.

- To view details about the minimum and maximum ages and funding status for each age group at the service, select the **Age Range** tab.

Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability **Age Range** Capacity Details Vacancies

Guidance Notes
Service Age Range Guidance

Minimum Age Years

Minimum Age Months

Maximum Age Years

Maximum Age Months

2 Year Old Funding

3 Year Old Funding

4 Year Old Funding

Comments for Local Authority

[Back](#) [Submit](#)

- To view numbers on the waiting list, vacancies and capacity for each age range at the service, select the **Capacity Details** tab.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range **Capacity Details** Vacancies

Guidance Notes
Service Capacity Guidance

Capacity Date

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 1	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 2	<input type="text"/>	<input type="text" value="12"/>	<input type="text" value="30"/>	
Age 3	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 4	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 5	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 6	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 7	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	
Age 8	<input type="text"/>	<input type="text"/>	<input type="text" value="30"/>	

[Add Age Range](#)

Comments for Local Authority

[Back](#) [Submit](#)

- To view the information currently held about whether the service can be contacted for vacancy details, whether there are immediate vacancies and whether there is a waiting list at the service, select the **Vacancies** tab.

Viewing Opening Dates, Times and Exceptions

To view the information currently held regarding dates and times that the service is open:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 45.

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			

2. Click the required **Description** link to display the **Opening Dates** tab.

3. To view opening times, select the **Opening Times** tab.

Using the Self Update Provider Portal

Description	Week day	Start Time	End Time	Vacancies	Pending Change	Clear	Changes
	MON	08:30	12:30	12			
	MON	14:00	17:30	12			
	TUE	08:30	12:30	12			
	TUE	14:00	17:30	12			
	WED	08:30	12:30	12			
	WED	14:00	17:30	12			
	THU	08:30	12:30	12			
	THU	14:00	17:30	12			
	FRI	08:30	12:30	12			
	FRI	14:00	17:30	12			

4. To view exceptions to opening times, select the **Opening Times Exceptions** tab.

Description	Week day	Start Date	End Date	Start Time	End Time	Pending Change	Clear	Changes
-------------	----------	------------	----------	------------	----------	----------------	-------	---------

Viewing Travel, Costs and Facilities

NOTE: The **Travel, Costs and Facilities** tabs are only displayed if the Local Authority has set the **Configuration Value** to **On** via the **Configuration** page. For more information, see [Configuring the Self Update Portal](#) on page 16.

1. View the basic details for the service. For more information, see [Viewing Service and Consent Details](#) on page 45.
2. To view details about parking, own transport and travel information, select the **Travel** tab and ensure that the **Travel Details** sub tab is selected.

3. To view information about school pickups, select the **School Pickups** sub tab.

4. To view details of service charges, select the **Costs** tab and ensure that the **Service Charges** sub tab is selected.

5. To view details of costs and **Sibling Discount**:
 - a. Select the **Costs** tab.
 - b. Select the **Cost Details** sub tab.

Self Update / St Marks / St Marks - Full Day Care / Costs

Service Charges Cost Details

Guidance Notes
Cost per age or age range per hour, day, session, term or week

Sibling Discount

Comments for Local Authority

Back Submit

- To view details of the facilities supported by the provider, select the **Facilities** tab.

Self Update / St Marks / St Marks - Full Day Care

Service Details Consent Availability and Capacity Travel Costs Facilities

Guidance Notes
Information about the facilities supported by the provider like wheelchair access, cultural provision, special needs provision, dietary provision, and languages spoken

Facility Car Parking Available, On Local Bus Routes

Wheel Chair Access

SEN Children

Cultural Provision None selected

Special Needs Code Physical Disability

Language Spoken Bengali, English, Portuguese

Diet Code Halal

Emergencies

Comments for Local Authority

Back Submit

Updating Service Details

Introduction

The provider can use the Self Update portal to make changes to the details that are currently held about their services. After making the required changes, they submit them for approval by the Local Authority.

The Local Authority administrator uses the **Self Update - General Configuration** page to determine which information can be updated. For more information, see [Configuring the Self Update Portal](#) on page 16.

If email feedback is enabled on the **Self Update - General Configuration** page, an email is sent to the specified email address whenever a provider submits a change. The Self Update portal sends the email using the details in **The self update email address** option as the **From** address. For more information, see [Configuring the Self Update Portal](#) on page 16.

The email contains the following information:

A request to [Create/Update/Delete] [Submission area e.g. Service Details] has been submitted to [Service name] at [Provider name].

[Comments for Local Authority]

Services can be accessed through Self Update.

NOTE: The details in italics vary depending on the type of submission and area of Early Years being changed. The email subject, content and layout can be changed on the **Self Update On Submit Email Template** page via **Provider Portal | Administration | Site Setup | Message Templates**. For more information, see [Message Templates](#) on page 5.

Updating Service Basic Details

To make changes to the service details currently held by the Local Authority:

1. View the service details. For more information, see [Viewing Service and Consent Details](#) on page 45.

The screenshot shows the 'Service Details' form in the Self Update Provider Portal. The breadcrumb trail is 'Self Update / St Marks / St Marks - Full Day Care'. The form includes several sections: 'Guidance Notes' (Service Guidance), 'Service Name' (St Marks - Full Day Care), 'Service Type' (Full Day Care), 'Start Date' (06/07/2007), 'End Date' (empty), 'Registered For Nursery Education Grant / Funding' (checked), 'Email Address', 'Web Site', 'Telephone Number', 'Fax Number', 'Address' (17, Prebend Street, [redacted]), 'Ofsted Provision Type' (Childcare - Domestic Premises), 'Offers Extended Childcare' (checked), 'Other Information', and 'Comments for Local Authority'. There are 'Back' and 'Submit' buttons at the bottom.

2. Make one or more changes to the **Service Details**:
 - a. Enter a **Service Name**, **Start Date** or **End Date**.
 - b. Select a **Service Type** (*Table ID: 0423*).
 - c. Enter one or more of the following contact information:
 - **Email Address**

Using the Self Update Provider Portal

- **Web Site** address
 - **Telephone Number**
 - **Fax Number**.
- d. Click the **Select** button to open the **Address Search** and select an address or add a new address. For more information, see [Selecting an Address](#) on page 54.
- e. Select or deselect the **Offers Extended Childcare** check box.

NOTE: If extended hours are already recorded for the current term and this check box is deselected, when the change is approved it will only affect future terms with no extended hours recorded.

- f. Enter **Other Information** and **Comments for Local Authority**.
3. Click the **Submit** button.

The screenshot shows a web form titled 'Self Update / St Marks / St Marks - Full Day Care'. The form has several tabs: 'Service Details' (active), 'Consent', 'Availability and Capacity', 'Travel', 'Costs', and 'Facilities'. Below the tabs is a 'Guidance Notes' section with 'Service Guidance'. The main form fields are:

- Service Name:** St Marks - Full Day Care
- Service Type:** Full Day Care
- Start Date:** 06/07/2007
- End Date:** (empty)
- Registered For Nursery Education Grant / Funding:** (checked)
- Email Address:** stmarks22@mail.com (highlighted in yellow)
- Web Site:** (empty)
- Telephone Number:** (empty)
- Fax Number:** (empty)
- Address:** 17, Prebend Street (with a 'Select' button)
- Ofsted Provision Type:** Childcare - Domestic Premises
- Offers Extended Childcare:** (checked)
- Other Information:** (empty text area)
- Comments for Local Authority:** (empty text area)

At the bottom left are 'Back' and 'Clear' buttons. At the bottom right is a 'Submit' button.

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 72.

Selecting an Address

1. Click the **Select** button to display the **Search Addresses** dialog.

Search Addresses [X]

To find the home address please enter the postcode and click "Find Address". If the address is not listed then type the correct address in the boxes provided.

Postcode

Address

Find Address Enter Address Manually

2. To find an existing address:

- a. Enter 2 or more characters of the **Postcode** and click the **Find Address** button to list matching addresses.
- b. Select the required address.

Alternatively, if the required address is not listed:

- a. Click the **Enter Address Manually** button to display the blank address fields.

Search Addresses [X]

To find the home address please enter the postcode and click "Find Address". If the address is not listed then type the correct address in the boxes provided.

Postcode

Address

Use Another Address

House Number

House Name

Apartment

Street Name

Street Name 2

District / Village

Town

County

Country

Country

Postcode

Save

Close

- b. Enter the address.
- c. Click the **Save** button.

The new address is highlighted on the **Basic Details** tab.

Updating Consent Details

The provider can update the details that control the consent to share information about the service by selecting or deselecting the check boxes. They can also add comments.

1. View the service details and select the **Consent** tab to display the details currently held for the service. For more information, see [Viewing Service and Consent Details](#) on page 45.

Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care

Service Details | Consent | Availability and Capacity | Travel | Costs | Facilities

Guidance Notes
Service Consent Guidance

Consent to publish details to FID

Reason for not publishing details

Consent to share cost details

Consent to share telephone numbers

Consent to share address details

Consent to be contacted by email

Consent to be contacted by telephone

Consent to be contacted by post

Signature provided

Comments for Local Authority

Back Submit

2. To change the consent details:
 - a. Select or deselect one or more of the check boxes.
 - b. If required, select a **Reason for not publishing details** from the drop-down list (*Table ID: 1116*).
 - c. If required, enter **Comments for Local Authority**.
3. Click the **Submit** button.

Self Update / St Marks / St Marks - Full Day Care

Service Details | Consent | Availability and Capacity | Travel | Costs | Facilities

Guidance Notes
Service Consent Guidance

Consent to publish details to FID

Reason for not publishing details

Consent to share cost details

Consent to share telephone numbers

Consent to share address details

Consent to be contacted by email

Consent to be contacted by telephone

Consent to be contacted by post

Signature provided

Comments for Local Authority

Back Clear Submit

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 72.

Updating Availability and Capacity Details

Information about when the service is available, the age ranges accepted, capacity, vacancies and waiting list can be updated by the provider.

When changes are submitted, if email feedback is enabled on the **Self Update General Configuration** page, an email will sent to the email address specified. For more information, see [Configuring the Self Update Portal](#) on page 16.

Adding a New Opening Date

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 45.

2. To add a new opening date:
 - a. Click the **Add Opening Date** button to display the **Opening Dates** tab.
 - b. Enter a **Description** and a **Start Date**.
 - c. If required, enter an **End Date**.
 - d. If required, enter **Comments for Local Authority**.
 - e. Click the **Submit** button.

The **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear All** button is displayed to enable the submitted changes for this item and all associated records to be cleared. For more information, see [Clearing All Related Changes](#) on page 72.

3. To add new opening times for the opening date:

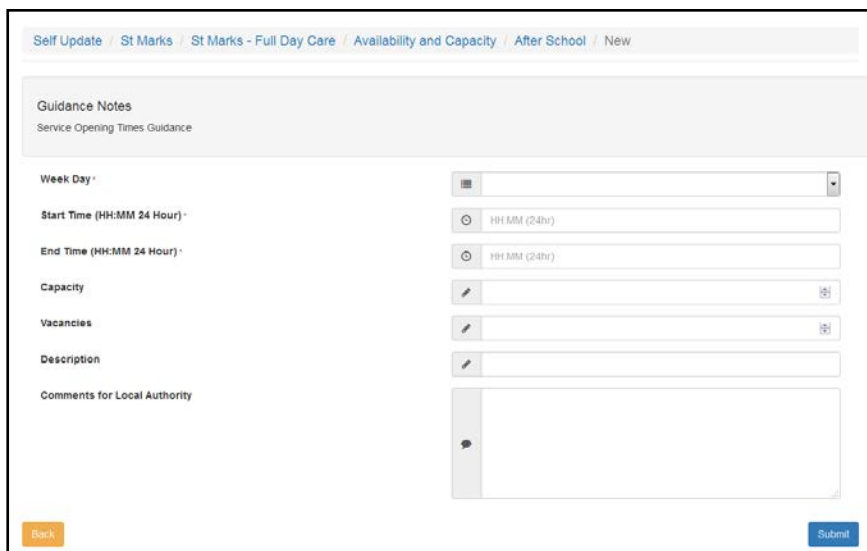
Using the Self Update Provider Portal

- Select the **Opening Times** tab.



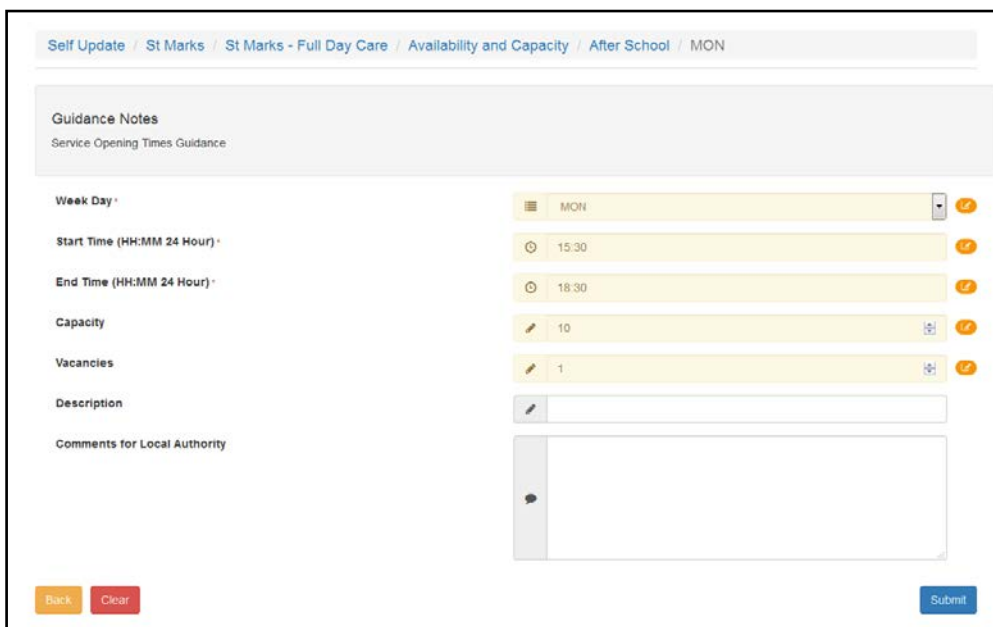
The screenshot shows the navigation path: Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / After School. Below the path are three tabs: 'Opening Dates' (with a red 'X' icon), 'Opening Times' (selected), and 'Opening Times Exceptions'. A table header is visible with columns: Description, Week day, Start Time, End Time, Vacancies, Pending Change, Clear, and Changes. At the bottom left is a 'Back' button and at the bottom right is an 'Add Opening Time' button.

- Click the **Add Opening Times** button to display the **New** opening times page.



The screenshot shows the 'New' opening times page. The navigation path is: Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / After School / New. Below the path is a 'Guidance Notes' section with the text 'Service Opening Times Guidance'. The form fields are: 'Week Day' (dropdown menu), 'Start Time (HH:MM 24 Hour)' (time picker), 'End Time (HH:MM 24 Hour)' (time picker), 'Capacity' (text input), 'Vacancies' (text input), 'Description' (text input), and 'Comments for Local Authority' (text area). At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

- Enter the opening times for this opening date.
- Click the **Submit** button.



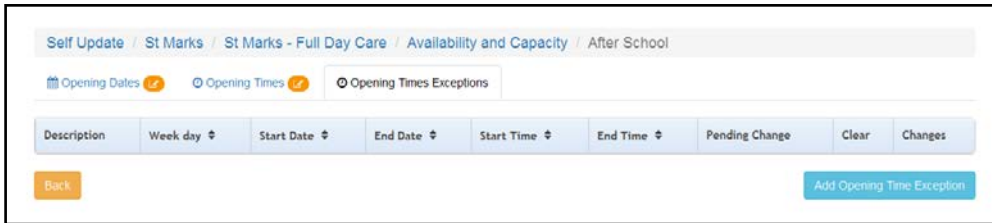
The screenshot shows the 'New' opening times page with the following changes: 'Week Day' is set to 'MON', 'Start Time' is '15:30', 'End Time' is '18:30', 'Capacity' is '10', and 'Vacancies' is '1'. These fields are highlighted in yellow. A red 'X' icon (Pending Changes) is visible next to the 'Week Day', 'Start Time', 'End Time', 'Capacity', and 'Vacancies' fields. The 'Description' and 'Comments for Local Authority' fields are empty. At the bottom left are 'Back' and 'Clear' buttons, and at the bottom right is a 'Submit' button.

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 72.

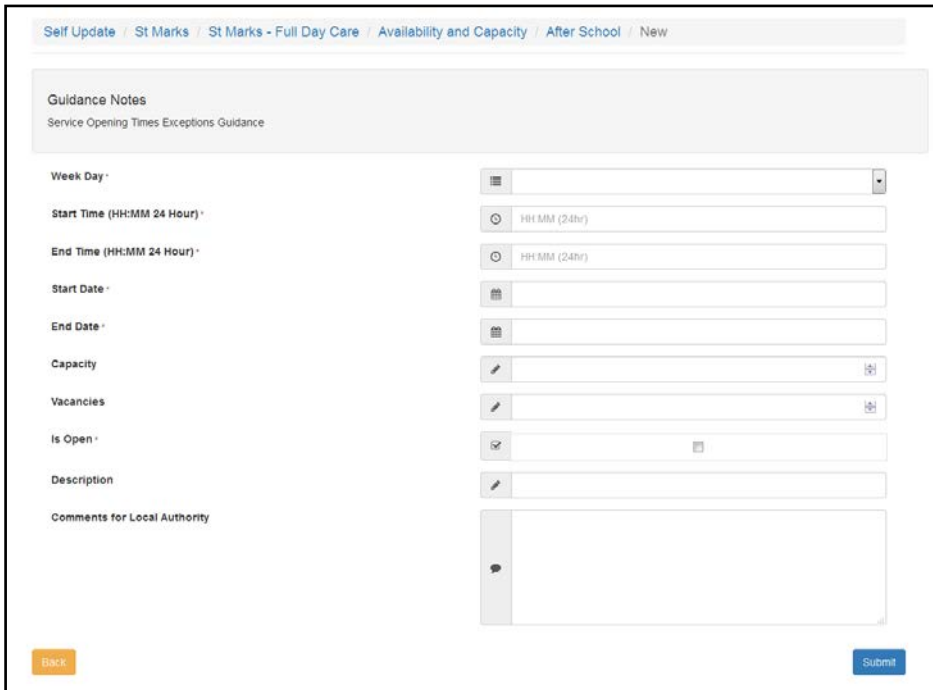


4. If required, add exceptions to the opening times for this opening date:

a. Select the **Opening Times Exceptions** tab.



b. Click the **Add Opening Times Exception** button to display the **New** opening times exceptions page.



c. Enter the opening times exceptions for this opening date.

d. Click the **Submit** button.

Using the Self Update Provider Portal

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity / After School / FRI

Guidance Notes
Service Opening Times Exceptions Guidance

Week Day: FRI (Pending Changes)

Start Time (HH:MM 24 Hour): 15:30 (Pending Changes)

End Time (HH:MM 24 Hour): 17:30 (Pending Changes)

Start Date: 07/09/2018 (Pending Changes)

End Date: 21/12/2018 (Pending Changes)

Capacity: [Text Field]

Vacancies: [Text Field]

Is Open: (Pending Changes)

Description: [Text Field]

Comments for Local Authority: [Text Area]

Buttons: Back, Clear, Submit

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 72.

Updating an Existing Opening Date

To update the opening and closing dates, opening times and opening time exceptions for the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 45.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates (Pending Changes) | Availability | Age Range | Capacity Details | Vacancies

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			
After School	03/09/2018		Create	Clear All	(Pending Changes)

Buttons: Back, Add Opening Date

2. To update existing opening dates:
 - a. Click the link on the opening dates description to display the **Opening Dates** tab.

The screenshot shows the 'Self Update' portal for 'St Marks - Full Day Care' under the 'Availability and Capacity' section. The 'Opening Dates' tab is selected. The form includes a 'Guidance Notes' section with 'Service Opening Dates Guidance'. Below this are fields for 'Description' (Full Day Care), 'Start Date' (06/07/2007), and 'End Date' (06/07/2018). There is also a 'Comments for Local Authority' text area. 'Back' and 'Submit' buttons are visible at the bottom.

- b. If required, select the **Opening Times** or **Opening Times Exceptions** tab.
- c. Make changes to the current information.
- d. Click the **Submit** button.

Updating the Availability of the Service

To update the information about when the service is open and available:

1. View the basic details for the service and select the **Availability and Capacity** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 45.
2. To update availability:
 - a. Select the **Availability** tab.

The screenshot shows the 'Self Update' portal for 'St Marks - Full Day Care' under the 'Availability and Capacity' section. The 'Availability' tab is selected. The form includes a 'Guidance Notes' section with 'Service Availability Guidance'. Below this are fields for 'Number of weeks open' (25) and 'When service is available' (All Year, Full Time, Half Term, Lunch Club). There is also a 'Comments for Local Authority' text area. 'Back' and 'Submit' buttons are visible at the bottom.

- b. Enter the required information.
- c. Click the **Submit** button.

Updating Age Ranges at the Service

To update the minimum and maximum age range and funding details for the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 45.

2. Select the **Age Range** tab.

The screenshot shows the 'Age Range' tab selected in the 'Availability and Capacity' section. The breadcrumb trail is 'Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity'. The navigation tabs are 'Opening Dates', 'Availability', 'Age Range', 'Capacity Details', and 'Vacancies'. The 'Age Range' tab is active. Below the tabs is a 'Guidance Notes' section with the text 'Service Age Range Guidance'. The main form contains the following fields:

Minimum Age Years	1
Minimum Age Months	
Maximum Age Years	4
Maximum Age Months	
2 Year Old Funding	<input type="checkbox"/>
3 Year Old Funding	<input type="checkbox"/>
4 Year Old Funding	<input type="checkbox"/>
Comments for Local Authority	

At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

3. Enter the required information.
4. Click the **Submit** button.

Updating the Capacity Details for the Service

To update the capacity information, including the number of vacancies and waiting list numbers for each age range at the service:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 45.
2. Select the **Capacity Details** tab.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Guidance Notes
Service Capacity Guidance

Capacity Date: 06/07/2007

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0		12	30	
Age 1		12	30	
Age 2		12	30	
Age 3			30	
Age 4			30	
Age 5			30	
Age 6			30	
Age 7			30	
Age 8			30	

Add Age Range

Comments for Local Authority

Back Submit

3. Make changes to the current information.
4. If required, to add a new age range:
 - a. Click the **Add Age Range** button.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range **Capacity Details** Vacancies

Guidance Notes
Service Capacity Guidance

Capacity Date 06/07/2007

Service Age Range

Age Range	Waiting List	Vacancies	Capacity	Pending Change
Age 0		12	30	
Age 1		12	30	
Age 2		12	30	
Age 3			30	
Age 4			30	
Age 5			30	
Age 6			30	
Age 7			30	
Age 8			30	
				Create Clear

Add Age Range

Comments for Local Authority

Back Submit

- b. Select an **Age Range** from the drop-down.
 - c. Enter the capacity details for the new age range.
 - d. Click the **Create** button.
5. Click the **Submit** button.

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing All Related Changes](#) on page 72.

Updating the Vacancy Details

To update the information about vacancies, including contacting the service about vacancies and whether the service has a waiting list:

1. View the basic details for the service and select the **Availability and Capacity** tab. For more information, see [Viewing Service and Consent Details](#) on page 45.
2. Select the **Vacancies** tab.

3. If required, select or deselect the check boxes and enter comments.
4. Click the **Submit** button.

The updated fields are highlighted and the **Pending changes** icon is displayed on the tab and next to the fields that have been changed. The **Clear** button is displayed to enable the submitted changes to be cleared. For more information, see [Clearing Submitted Changes](#) on page 72.

Updating Travel Information

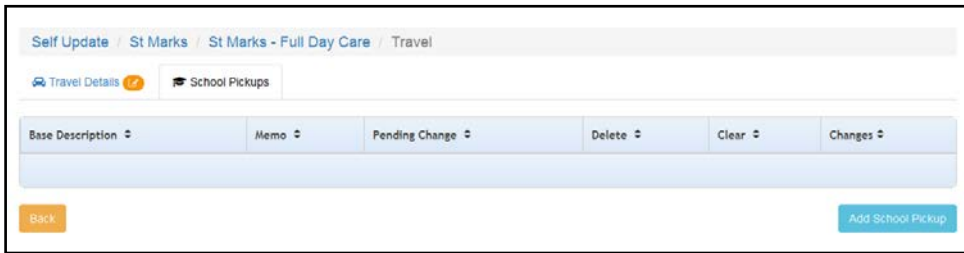
Travel information and details of school pickups for the service are updated via the **Travel** tab.

1. View the basic details for the service and select the **Travel** tab. For information about how to view the service details, see [Viewing Service and Consent Details](#) on page 45.
2. To update details about parking spaces, own transport and travel:
 - a. Select the **Travel Details** sub-tab.

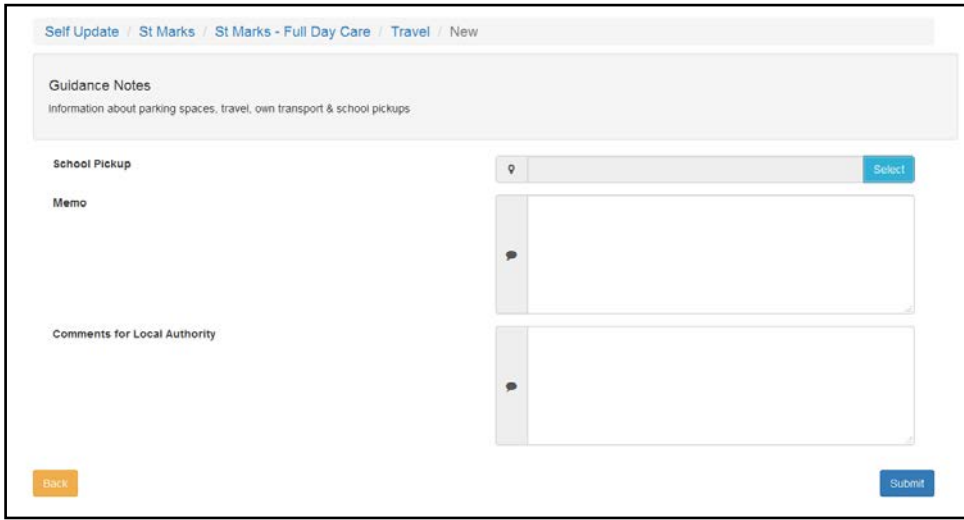
- b. If required, select or deselect the check boxes, enter **Travel Information** and comments.
 - c. Click the **Submit** button.

Using the Self Update Provider Portal

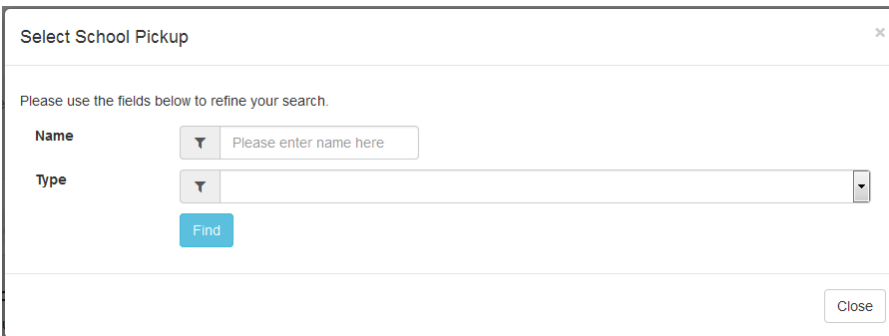
- 3. To add a new school pickup:
 - a. Select the **School Pickups** sub-tab.



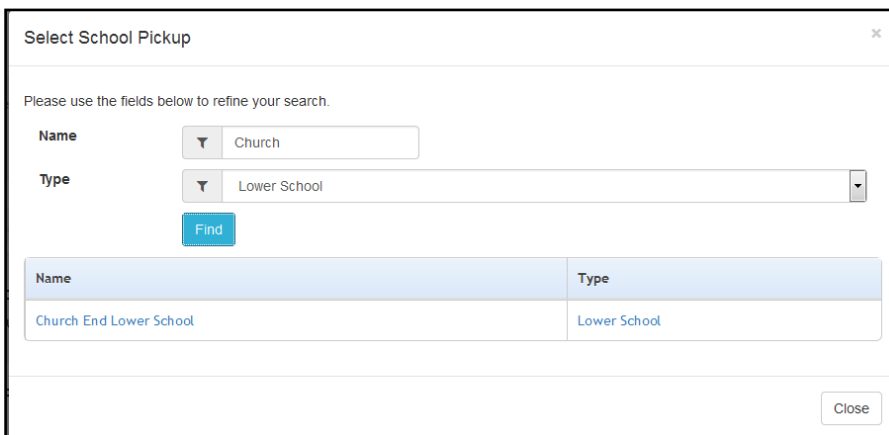
- b. Click the **Add School Pickup** button.



- c. Click the **Select** button to display the **Select School Pickup** dialog.



- d. Enter search details for the required school and click the **Find** button.



- e. Select the required school in the list.

The screenshot shows a web form titled 'Self Update / St Marks / St Marks - Full Day Care / Travel / New'. Under the 'Guidance Notes' section, there is a 'School Pickup' dropdown menu with 'Church End Lower School' selected. Below this are two text input fields labeled 'Memo' and 'Comments for Local Authority'. At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

- f. If required, add a **Memo** and comments.
- g. Click the **Submit** button.

This screenshot is similar to the previous one, but the 'Church End Lower School' selection in the dropdown menu is highlighted in yellow and has a small orange checkmark icon to its right. Additionally, a 'Clear' button has appeared next to the 'Back' button at the bottom left.

Updating Service Charges

Service charges for each age group are updated via the **Service Charges** sub-tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 44.
2. Click the link for the required service to display the **Basic Details** tab.
3. To add new service charges:
 - a. Select the **Costs** tab to display the **Service Charges** sub-tab.

The screenshot shows the 'Self Update / St Marks / St Marks - Full Day Care / Costs' page. The 'Costs' tab is active, and the 'Service Charges' sub-tab is selected. A table is displayed with the following columns: Age Range, Charge per Hour, Charge per Session, Charge per Day, Charge per Week, Charge per Term, Pending Change, Delete, Clear, and Changes. At the bottom left is a 'Back' button and at the bottom right is an 'Add Charge Details' button.

- b. Click the **Add Charge Details** button.

Using the Self Update Provider Portal

- c. Select an **Age Range** from the drop-down.
 - d. If required, enter charges and comments.
 - e. Click the **Submit** button.
4. To update service charges:
- a. Select the **Costs** tab to display the **Service Charges** sub-tab.

Age Range	Charge per Hour	Charge per Session	Charge per Day	Charge per Week	Charge per Term	Pending Change	Delete	Clear	Changes
Age 1	5					Create		Clear All	
Age 0	5	20	40			Create		Clear All	

- b. Select the required **Age Range** to display the details.

- c. Update the required details.
- d. Click the **Submit** button.

Updating Cost Details

Cost details are updated via the **Cost Details** sub-tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 44.
2. Click the link for the required service to display the **Basic Details** tab.
3. Select the **Costs** tab.
4. Select the **Cost Details** sub-tab.

5. If required, select or deselect the **Sibling Discount** check box and add comments.
6. Click the **Submit** button.

Updating Facilities

The facilities supported at the service are updated via the **Facilities** tab.

1. Select the required provider to view a list of services. For information about using the Self Update Provider Portal to view your services, see [Viewing Providers and Services](#) on page 44.
2. Click the link for the required service to display the **Basic Details** tab.
3. Select the **Facilities** tab.

Using the Self Update Provider Portal

The screenshot shows the 'Facilities' page in the Self Update Provider Portal. The breadcrumb trail is 'Self Update / St Marks / St Marks - Full Day Care'. The page has tabs for 'Service Details', 'Consent', 'Availability and Capacity', 'Travel', 'Costs', and 'Facilities'. A 'Guidance Notes' section provides information about facilities supported by the provider. The main form includes fields for 'Facility' (a dropdown menu), 'Wheel Chair Access', 'SEN Children', 'Cultural Provision', 'Special Needs Code', 'Language Spoken', 'Diet Code', 'Emergencies', and 'Comments for Local Authority'. A 'Back' button is in the bottom left and a 'Submit' button is in the bottom right.

4. If required, select or deselect the check boxes, select from the drop-down lists and enter comments.
5. Click the **Submit** button.

Adding a Service

The ability for providers to add new services is enabled or disabled via the **Self Update - General Configuration** page. If **Enable provider users to add services** is set to **On**, a provider can add a new service. For more information, see [Configuring the Self Update Portal](#) on page 16.

To add a new service:

1. View a list of services for the provider. For information about using the Self Update Provider Portal to view your services, see [Viewing Service Details](#) on page 44.

The screenshot shows the 'Services - Self Update' page. It features a search bar and a dropdown menu. Below is a table with the following data:

Service Name	Service Type	Start Date	End Date	FID Type	Changes	Action
St Marks - Full Day Care	Full Day Care	06/07/2007		ECD		Clear All

At the bottom of the page, there are 'Back' and 'Add Service' buttons.

2. Click the **Add Service** button to display the **New Service** page.

The screenshot shows a web form for creating a new service. The breadcrumb trail is 'Self Update / St Marks / New Service'. The main navigation tabs are 'Service Details', 'Consent', 'Availability and Capacity', 'Travel', 'Costs', and 'Facilities'. The 'Service Details' tab is selected. Below the tabs is a 'Guidance Notes' section with a sub-section for 'Service Guidance'. The form fields are as follows:

- Service Name:** A text input field with an edit icon.
- Service Type:** A dropdown menu.
- Start Date:** A date picker.
- End Date:** A date picker.
- Registered For Nursery Education Grant / Funding:** A checkbox.
- Email Address:** A text input field with an edit icon.
- Web Site:** A text input field with an edit icon.
- Telephone Number:** A text input field with an edit icon.
- Fax Number:** A text input field with an edit icon.
- Address:** A text input field with a location pin icon and a 'Select' button.
- Ofsted Provision Type:** A text input field with an edit icon.
- Offers Extended Childcare:** A checkbox.
- Other Information:** A large text area with a speech bubble icon.
- Comments for Local Authority:** A large text area with a speech bubble icon.

At the bottom left is a 'Back' button and at the bottom right is a 'Submit' button.

3. Enter a **Service Name**.
4. Enter a **Start Date**.
5. Select **Service Type** (*Table ID: 0423*)
6. If required, select the **Registered For Nursery Education Grant/Fund** check box.
7. If required, enter one or more of the following contact information:
 - **Email Address**
 - **Web Site** address
 - **Telephone Number**
 - **Fax Number**.
8. If required, click the **Select** button to open the **Address Search** and select an address. For more information, see [Selecting an Address](#) on page 54.
9. If required, enter remaining details:
 - **Ofsted Provision Type**
 - **Other Information**
 - **Comments for Local Authority**.
10. Click the **Submit** button.

Clearing Submitted Changes

If a provider has submitted changes but the Local Authority has not approved them, they can be cleared.

The screenshot shows the 'Availability and Capacity' page in the Self Update Provider Portal. The 'Availability' tab is selected and has a yellow 'Pending changes' icon. The page contains the following elements:

- Navigation: Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity
- Menu: Opening Dates, Availability (Pending changes), Age Range, Capacity Details, Vacancies
- Guidance Notes: Service Availability Guidance
- Number of weeks open: 26
- When service is available: All Year, Full Time, Half Term, Lunch Club
- Comments for Local Authority: A text area with a speech bubble icon.
- Buttons: Back, Clear, Submit

To clear submitted changes and remove the **Pending changes** icon from the tab, click the **Clear** button.

The screenshot shows the 'Availability and Capacity' page after the changes have been cleared. The 'Availability' tab now has a green 'Cleared' icon. The page contains the following elements:

- Navigation: Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity
- Menu: Opening Dates, Availability (Cleared), Age Range, Capacity Details, Vacancies
- Guidance Notes: Service Availability Guidance
- Number of weeks open: 25
- When service is available: All Year, Full Time, Half Term, Lunch Club
- Comments for Local Authority: A text area with a speech bubble icon.
- Buttons: Back, Submit

Clearing All Related Changes

If there are pending changes for related records, they can all be cleared at once.

For example, to clear all changes for a new opening date:

1. View the availability and capacity details currently held for the service. For more information, see [Viewing Availability and Capacity](#) on page 46.

Self Update / St Marks / St Marks - Full Day Care / Availability and Capacity

Opening Dates Availability Age Range Capacity Details Vacancies

Description	Start Date	End Date	Pending Change	Clear	Changes
Full Day Care	06/07/2007	06/07/2018			
After School	03/09/2018		Create	Clear All	

[Back](#) [Add Opening Date](#)

2. Click the **Clear All** button.

Index

address search.....	54
administraion	
edit provider updates	28
administration	
approve provider updates.....	26
overwrite provider updates	27
provider self updates	19
reject provider updates	30
sending messages.....	31
configure text.....	4
current users	9
email update.....	9
guidance notes.....	12
messages	
templates	5
password reset.....	10, 38
permissions	10
portal logging in.....	37
portal user account activation	37
provider	
add a new service.....	70
clear changes	72
updating service details.....	52
viewing and updating census	40
viewing messages	43
viewing service details.....	44
providers - view services.....	39
registered users	9
reset inactive account	10
secret question reset.....	38
SUPP configuration.....	16
scheduled task.....	17
text customisation	4
two step verification.....	7, 39
user access	8, 9
user access to services.....	8
user accounts.....	6
user funded services	8
user name retrieval	37