Wirral Borough Council

Provider Portal
Self-Update User Guide

Early Years Provider Information and Census

Contents

Section

1. Background

1.1 Self-Update is a module within the Wirral Provider Portal which is used for updating provider's information and to allow easy census submission when required. This is a direct replacement for completing online sufficiency forms at intervals.

1.2 All funded providers will have access to the Self-Update module to submit information regarding their provision when tasks are requested.

1.3 If a new member of staff within a setting requires a log in for the Provider Portal, the manager of the setting must email childrenssystemsteam@wirral.gov.uk with the following details:
Forename and surname of employee requiring access
Name of setting
Address of setting
Contact number (work)
Email address of the employee requiring access
(Please note: email must be an individual work address rather than a generic setting email. For instance, daniel@littledinosaurs.com as opposed to enquiries@littledinosaurs.com)

1.4 All portal users have responsibility to inform Wirral Borough Council when access is no longer required to the Provider Portal. Notification of any changes to work location should also be made, for instance if a staff member moves from one setting to another. Changes should be emailed to childrenssystemsteam@wirral.gov.uk

2. Logging on to the Self-Update Portal and Navigation

2.1 The username and password used to log in to the Self-Update Portal is the same log in for Headcount and Better Start. For providers who have recently registered, during the first log in a request to change your password will be present.

2.2 If new user access is required please contact childrenssystemsteam@wirral.gov.uk

2.3 To open a new internet browser session, select the browser installed on your machine, ie: Internet Explorer, Google Chrome or Firefox etc
In the search bar located at the top of the screen the Provider Portal address needs to be added:

https://ems.wirral.gov.uk/Provider_Portal_LIVE

2.4 The Provider Portal log in page should now be displayed.

2.5 Please note that Provider Portal log in page will also display any notices such as maintenance or upgrade times. If there are difficulties logging in please check here first for any relevant information.

2.6 Log in: Please now enter your Username and Password. *(All passwords are case sensitive and must follow the following guidelines: a minimum of 10 characters containing at least 1 capital letter, 2 numbers and 1 special character.)*

Once the information is entered please click the 'Log In' button.

2.7 Secret question: Please now enter the answer to your secret question. If this is your first time logging in you will be asked to set this up. Once you have entered this information please click the 'Submit' button.
(If you have forgotten your secret answer please click the link 'Forgotten your secret answer' button.)

2.8 Enable Two Step Verification now: The first pop up message as you log in on the right hand side will alert you to increasing your security. This is optional.

2.9 If you wish to set-up two step verification, please click the 'Enable now' text. The following message will then be displayed.

Two Step Verification

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.

Preferred method

➜ | No Two Step Verification ⌄

Save

The preference for two-step notification is set to 'No Two Step Verification' as default. To enable this added security measure, please click the drop down menu and select 'email'. Enabling this feature will send an email to the registered account at each sign in with a specific code which needs to be entered swiftly before you can access the portal.

Preferred method

➜ | Email
      No Two Step Verification

Save

(Please note that if you set up this feature each time you sign in a new code will have to be entered to allow access. This has to be entered within a very short time frame.)

2.10 Account information: As you log in, again on the right hand side an information box will appear. This details the last time the account was logged into by the user.

**Account Information**
ⓘ You last logged in at:09/07/2018 14:12:06

(If the date and time do not reflect the last time you logged into the account this could potentially highlight a security breach. Firstly please change your password and then email childrenssystemsteam@wirral.gov.uk*)*
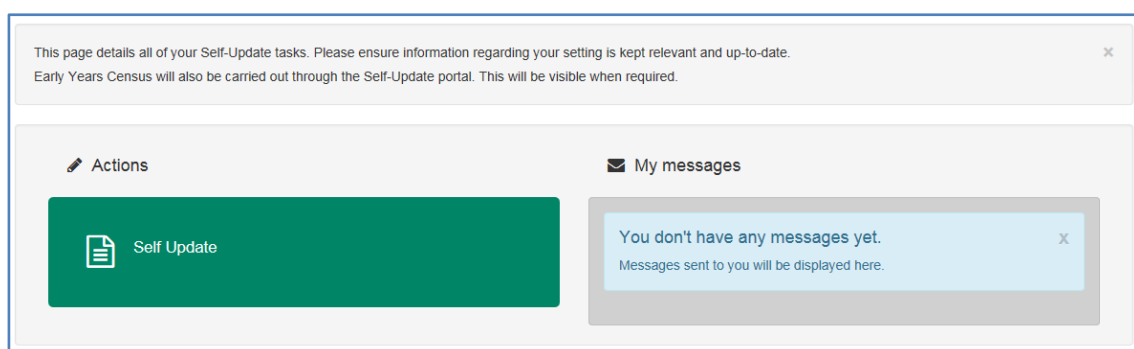
3. Home Page

3.1 When you log in, any announcements for Better Start, Headcount and Two Year Old Funding will automatically be displayed before the home page is accessed. Please click the 'Continue' button to move onto the home page.
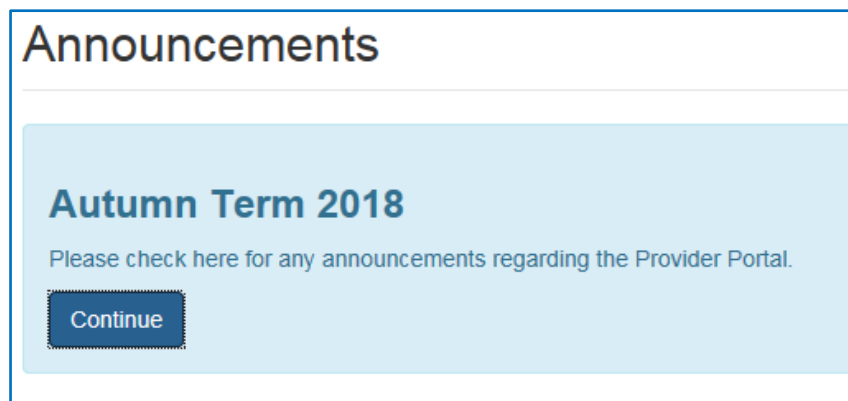

3.2 Once you have logged onto the Provider Portal you will have accessed the portal home page. Tiles will be displayed to show the different areas which can be accessed. Please click the 'Self-Update button to access the provider information side of the portal.
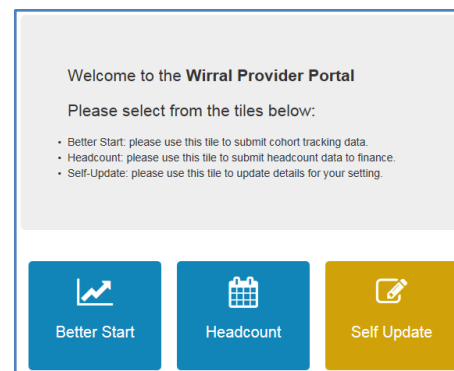

3.3 Once you have clicked the 'Self-Update tile you will now be at the Self-Update home page. There are now two headings you can access: **'Actions'**, and **'My messages'**.

3.4 Changing password and secret question: From any home page the currently logged in user can also change their password and/or secret answer. Clicking on the user name in the top right corner of the screen will display both options.
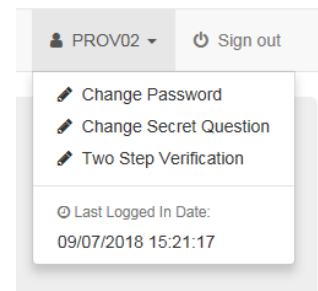
3.5 Any messages sent from the local authority regarding Self-update will be viewable on the Self-Update homepage.
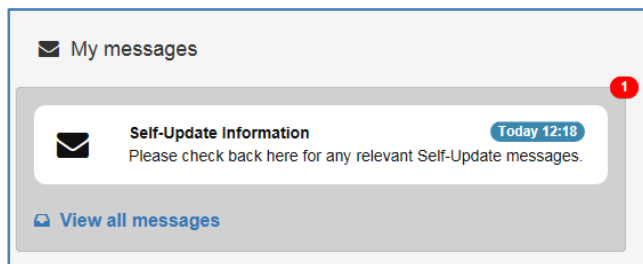
3.6 To open the message please click anywhere on the message alert. This will then open the page below. Please use the red **'Delete'** button to the right of to delete the message, or **'Back'** to keep the message and return to the previous screen.
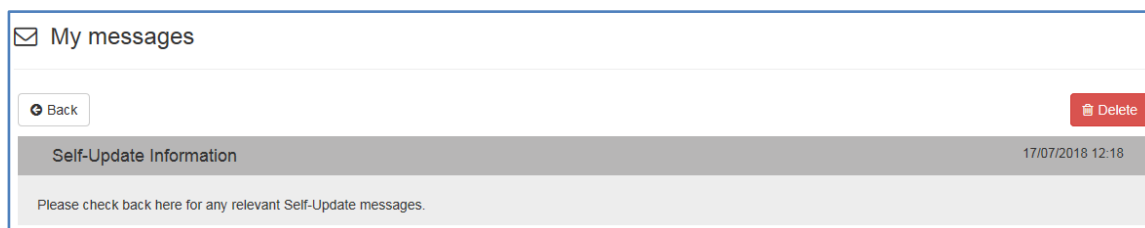
4. Service Details

4.1 When the green **'Self-Update'** button is clicked from the Self-Update homepage, the following screen will then be accessed. All providers linked to your account will show under the **'Provider Name'** filter. To update information on the provider please click on the name, ie: **'Test Daycare'**.

Providers - Self Update

Provider Name ⇕	Census Information	Email	Changes
❯ Test Daycare	Early Years Census	test@daycare.com	

1 Record(s) Total

4.2 The following screen will then be presented. Please then select the service linked to the provision previously selected which you would like to update, ie: **'Test Daycare-Bromborough – Full Daycare'.** If you would like to add a new service to this provider, please click the 'Add Service' button located to the right hand side. (Follow section 9 for further guidance.)

Services - Self Update

Self Update / Test Daycare - Bromborough

Service Name ⇕	Service Type ⇕	Start Date ⇕	End Date ⇕	FID Type ⇕	Changes	Action
❯ Test Daycare - Bromborough - Full Daycare	Combined Nursery Centre	15/10/2008		ECD		

Back

Add Service

4.3 The initial screen shown will be **'Service Details'**. This is the basic information for your setting, and any details which the local authority currently holds will be pre-populated. Please check that details held are correct and make changes or add relevant information where required. When this has been completed please click the blue **'Submit'** button located in the bottom right hand corner of the screen.

Service Details ✓ Consent 🗐 Availability and Capacity 🚗 Travel £ Costs 👤 Facilities	

Guidance Notes
Please complete all basic information about your setting.

When you have finished please click submit.

Field	Value
Service Name *	✏ Test Daycare - Bromborough - Full Day Care
Service Type *	☰ Full Day Care ⌄
Start Date *	📅 15/10/2008
End Date	📅
Registered For Nursery Education Grant / Funding	☑
Email Address	✏
Web Site	✏
Telephone Number	✏
Fax Number	✏
Address	📍 Select
Ofsted Provision Type	✏
Offers Extended Childcare	☑
Other Information	💬
Comments for Local Authority	💬

Back   Submit

When information is changed and submitted, a confirmation will appear in the top right corner of the screen.)

✔ Saved Successfully
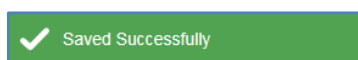
The yellow data change icon will also appear next to the fields which have changed. You can select the red **'Clear'** button in the bottom left hand corner to remove any changes.
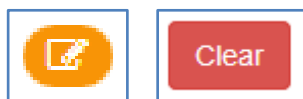
📝   Clear

Guidance Notes
Please complete all basic information about your setting.

When you have finished please click **submit**.

Field	Value	
Service Name *	✏ Test Daycare - Bromborough - Full Day Care	📝
Service Type *	☰ Full Day Care ⌄	📝
Start Date *	📅 16/10/2008	📝

4.4 Please click on the second option on the top toolbar which is **'Consent'**. This outlines the consent provided for various information to be shared, for instance to parents requesting childcare in a certain location. The **'Signature provided'** option should be ticked to confirm the information you have added is approved by the setting.

When this has been completed please click the blue **'Submit'** button located in the bottom right hand corner of the screen.

(Please note: See the end of section 4.3 more information.)

5. Availability and Capacity

5.1 Please then click on the third option on the top toolbar which is **'Availability and Capacity'**. This will bring up the sub menu below. The first option is **'Opening Dates'**. Changes can be added and submitted to existing dates by clicking on the description, for instance if the settings opening times change. To add new opening dates please click the blue **'Add Opening Date'** button located in the bottom right corner.

Opening Dates	Availability	Age Range	Capacity Details	Vacancies		
Description	**Start Date**		**End Date**	**Pending Change**	**Clear**	**Changes**
2009	15/01/2009		14/01/2020			

Back ／ Add Opening Date

(Please note: an **'End Date'** only needs adding if the record needs ending completely, for instance if the setting is closing, otherwise it can be left blank.)

5.2 When you have selected an opening date range to edit, the screen below will be available to make changes. The three sub menu tabs available allow **'Opening Dates'**, **'Opening Times'** and **'Opening Time Exceptions'** to be added or modified. The first screen will allow **'Opening Dates'** to be edited if applicable.

Opening Dates	Opening Times	Opening Times Exceptions

Guidance Notes
Please use the tabs above to enter opening dates, opening times and any exceptions to opening schedules.

When you have finished please click **submit**.

Description *	2009
Start Date *	15/01/2009
End Date	14/01/2020
Comments for Local Authority	

Back ／ Submit

5.3 The next screen allows **'Opening Times'** to be edited. Please either click on an existing time on the table to make any relevant changes, or click the blue **'Add Opening Time'** button in the bottom right hand corner.

Please then add any new opening times/changes in the fields provided. When these have been added please click the blue **'Submit'** button located in the bottom right corner of the screen.

5.4 The final option on this sub screen is **'Opening Time Exceptions'.** Please add any exceptions to your normal opening times here.

Please click the blue **'Add Opening Time Exception'** button in the bottom right hand corner. The menu below will then be visible.

Once all required exceptions are added please then click the blue **'Submit'** button located in the bottom right hand corner.

5.5 Please then return to the initial menu (as shown in section 5.1) To do this please use the navigation bar at the top of the page. Clicking on your provider service name will bring you back to the initial menu.

Self Update / Test Daycare - Bromborough / Test Daycare - Bromborough - Full Daycare / Availability and Capacity

5.6 Please then click the tab **'Availability'** at the top of the screen. Please add details regarding the number of weeks the setting is open and the type of offer, ie: term time only. When relevant changes have been added, please click the blue **'Submit'** button. Any changes made will now appear with the yellow data change icon next to the relevant field. This will also appear in the top ribbon.

5.7 Please then choose the **'Age Range'** tab. Please enter information regarding the age ranges which the setting accepts and funding offered. When relevant changes have been added, please click the blue **'Submit'** button. Any changes made will now appear with the yellow data change icon next to the relevant field. This will also appear in the top ribbon.

5.8 Please then choose the **'Capacity Details'** tab. This will outline information on the settings waiting list, current vacancies and capacity levels. When relevant changes have been added, please click the blue **'Submit'** button. Any changes made will now appear with the yellow data change icon next to the relevant field. This will also appear in the top ribbon.
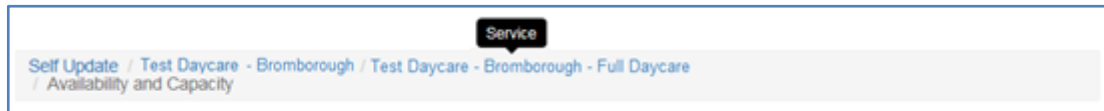

To add a new age range please click the blue **'Add Age Range'** button which will bring up the screen below. Repeat the process if required for different age ranges.

5.9 The final option in the **'Availability and Capacity'** menu is **'Vacancies'**. This will outline your preferences for vacancies. When relevant changes have been added, please click the blue **'Submit'** button. Any changes made will now appear with the yellow data change icon next to the relevant field. This will also appear in the top ribbon.

6. Travel

6.1 To enter **'Travel'** information, you must first return to the main screen. Please click the service name located in the top ribbon to direct you back to the main menu.

Self Update / Test Daycare - Bromborough / Test Daycare - Bromborough - Full Daycare
/ Availability and Capacity

6.2 Please then click the **'Travel'** tab located in the top ribbon. The first option of this sub menu is **'Travel Details'**. Please enter the required information and then click the blue **'Submit'** button.

6.3 Please then select the **'School Pickups'** tab and enter information regarding local schools where pick up is currently offered. To delete a currently added pickup, please click the red delete button against the specific location. To add a new school pickup please click the blue **'Add School** Pickup' button.

Base Description ⇕	Memo ⇕	Pending Change ⇕	Delete ⇕	Clear ⇕	Changes ⇕
Test School	Note		Delete		

6.4 When adding a new school pickup, the screen below will be accessed.

6.5 Please then use the blue **'Select'** button to search for the relevant setting where pickups are offered. The following screen will then be accessible- please type in the name of the setting and select the type and click 'Find' to refine your search.

Select the correct setting to then bring you back to the previous screen. Once the information is correct please select the blue **'Submit'** button.

7. Costs

7.1 To enter **'Costs'** information, you must first return to the main screen. Please click the service name located in the top ribbon to direct you back to the main menu.

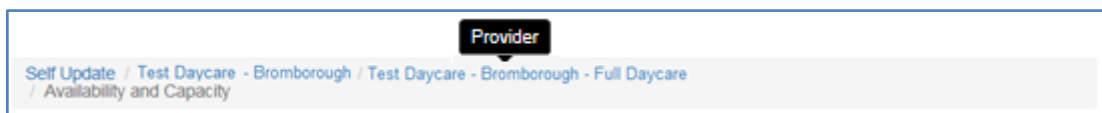7.2 Please then click the **'Costs'** tab located in the top ribbon. The first option of this sub menu is **'Service Charges'**. Please click the blue 'Add Charge Details' button located on the bottom right hand corner of the screen.

7.3 This will bring up the screen below. Please then add details regarding charges for various age ranges at the setting. Once the information is correct please select the blue **'Submit'** button.

(Please note: this process will need to be repeated for various age ranges.)

7.4 Please then click on the next tab **'Cost Details'**. This can be used to add if the setting offers a sibling discount. Once the information is correct please select the blue **'Submit'** button.

8. Facilities

8.1 To enter **'Facilities'** information, you must first return to the main screen. Please click the service name located in the top ribbon to direct you back to the main menu.

Self Update / Test Daycare - Bromborough / Test Daycare - Bromborough - Full Daycare / Availability and Capacity
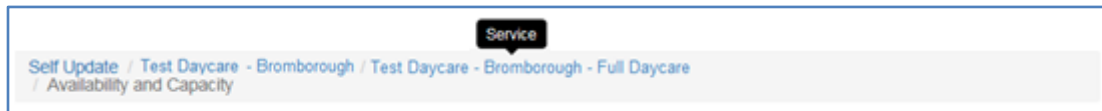
8.2 Please then click the **'Facilities'** tab located in the top ribbon. Here you will be able to add information regarding the facilities you provide, Special Needs provision, particular language spoken and dietary codes.

8.3 Once all information has been added, please click the blue **'Submit'** button located at the bottom right hand corner of the screen.

8.4 Once all information has been added into each section and you are satisfied the submission is complete, please click the provider name located in the top ribbon.
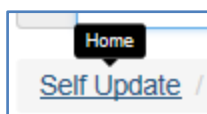
Self Update / Test Daycare - Bromborough / Test Daycare - Bromborough - Full Daycare / Availability and Capacity

8.5 This will bring you back to the following screen. If you have multiple services linked to your log in they will appear here. Please repeat the process covered in sections 4-8 if this is applicable.

Service Name ⇕	Service Type ⇕	Start Date ⇕	End Date ⇕	FID Type ⇕	Changes	Action
Self Update / Test Daycare						
❯ Test Daycare - Bromborough - Full Daycare	Combined Nursery Centre	15/10/2008		ECD	☑	Clear All

Back | | | | | | Add Service

(Please note: if changes have been made in self-update the yellow icon will appear under the **'Changes'** heading. To clear all information which has been edited please select the red **'Clear All'** button.)

Changes	Action
☑	Clear All

8.6 If you have several providers linked to your log in, then please select the **'Self Update'** link in the top ribbon.

Home
Self Update /

It will then show various providers linked to this log in. Please repeat steps in sections 4-8 if applicable.

Providers - Self Update

▼ [   ] Has Changes ☐   🔍 Search

Provider Name ⇕	Census Information	Email	Changes
❯ Test Daycare - Bromborough	Early Years Census	test@daycare.com	

1 Record(s) Total

9. Additional Information

9.1 To enter **'Additional information'**, you must first return to the main screen. Please click the service name located in the top ribbon to direct you back to the main menu.

> Service
>
> Self Update / Test Daycare - Bromborough / Test Daycare - Bromborough - Full Daycare / Availability and Capacity
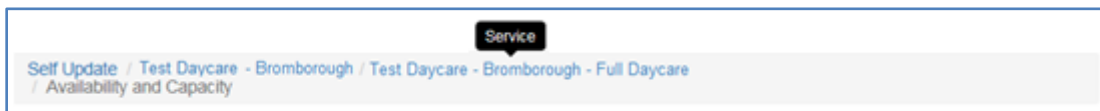
9.2 Please then click the **'Additional Information'** tab located in the top ribbon.

> ℹ Additional Information
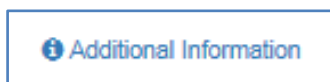
9.3 Please then add information on whether the setting qualifies for the quality supplement on funding, the name of the qualified staff member (if applicable) and confirmation that the funding agreement has been read and agreed. When all changes have been made please click the blue **'Submit'** button. If no changes are needed, please click the green **'No Changes Required'** button.

> Guidance Notes
> Please can you provide the relevant information.
>
> Setting Qualifies for Quality Supplement? ☑ ☐
>
> If Yes Enter Name/s of Qualified Staff 💬
>
> Read and agreed 'Funding Agreement 2019/2020'? ☑ ☐
>
> Back   No Changes Required   Submit

10. Add Service

10.1 If you have access to the **'Add Service'** button located on the **'Service'** tab, further services can be added. Please click the blue **'Add Service'** button if required.

Service Name ⇕	Service Type ⇕	Start Date ⇕	End Date ⇕	FID Type ⇕	Changes	Action
❯ Test Daycare - Bromborough - Full Daycare	Combined Nursery Centre	15/10/2008		ECD	🖉	Clear All

Self Update / Test Daycare

Back   Add Service

10.2 The screen below will then be available. Please fill out all of the required information and then click the blue **'Submit'** button.

Guidance Notes
Please complete all basic information about your setting.

When you have finished please click submit.

Service Name *	
Service Type *	∨
Start Date *	
End Date	
Registered For Nursery Education Grant / Funding	☐
Email Address	
Web Site	
Telephone Number	
Fax Number	
Address	Select
Ofsted Provision Type	
Offers Extended Childcare	✔
Other Information	
Comments for Local Authority	

Back   Submit

Once you have clicked **'Submit'** the service you have just added will appear on the provider list.

The service can now be selected by clicking on the appropriate link. Steps 4-8 will then need to be completed for the new service.
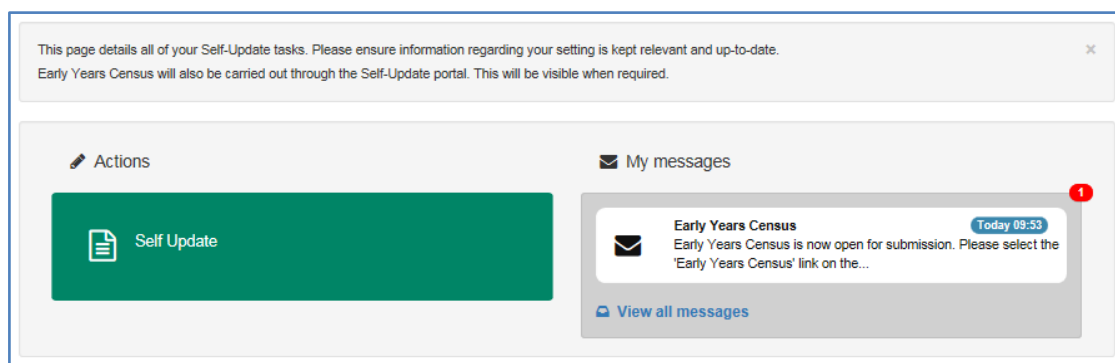
11. Census

11.1 Census information will be requested at designated points. (Please note: the Early Years Census link will only be available when census data is being requested.)

11.2 To access the Early Years Census, please select the 'Self Update' link on the Provider Portal homepage.
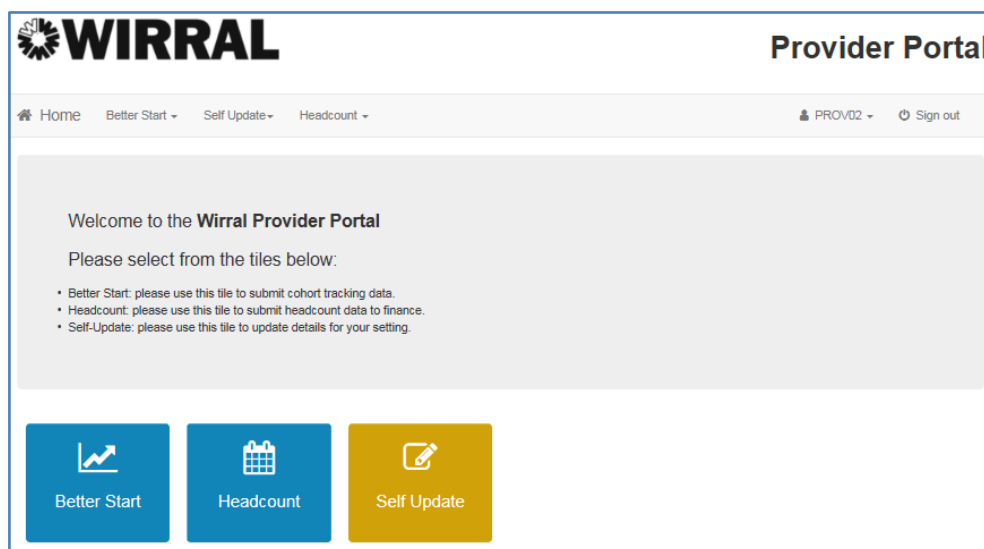
11.3 The screen below will then be visible. Please click the green 'Self Update' link under the 'Actions' heading. Any messages will also be available under the 'My messages' heading.

11.4 You will then be presented with the provider screen. (All providers linked to your log in will be present.)
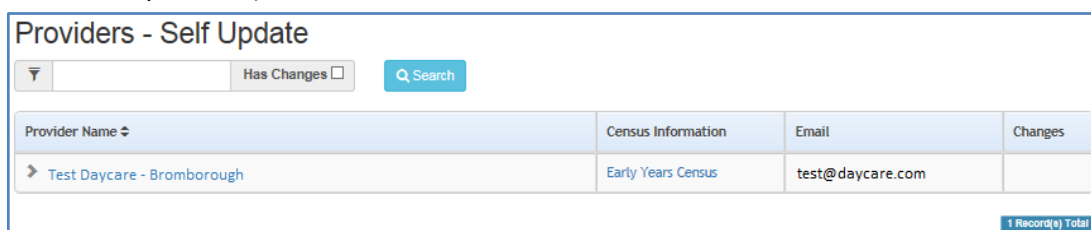
If Early Years Census submission is open, then the link will be visible under the 'Census Information' heading. Please click on this link (blue text) to begin the census submission.

Early Years Census

11.5 Please then complete information in the first section regarding **'Availability and Opening Times'**. (Please note: if you are continuously open, you can override all sections by clicking the **'Continuously Open'** box.)

Guidance Notes
Early Years Census 2018 Details.
Please ensure all fields are marked with up-to-date information. If all details are correct then the census can simply be re-submitted.

Availability and Opening Times

Number of Funding Weeks *	38
Number of Weeks Open *	51
Monday opening time	09:00
Monday closing time	15:30
Tuesday opening time	09:00
Tuesday closing time	15:30
Wednesday opening time	09:00
Wednesday closing time	15:30
Thursday opening time	09:00
Thursday closing time	15:30
Friday opening time	09:00
Friday closing time	15:30
Saturday opening time	HH:MM (24hr)
Saturday closing time	HH:MM (24hr)
Sunday opening time	HH:MM (24hr)
Sunday closing time	HH:MM (24hr)
Continuously Open	☐

11.6   Please then complete the remaining two sections, **'Total Staff Information'** and **'Number of Children By Age'**. (Please note: Sum of staff qualifications must add up to the **'Total Number of Staff'**. If staff hold more than one qualification, please enter the highest level achieved.)
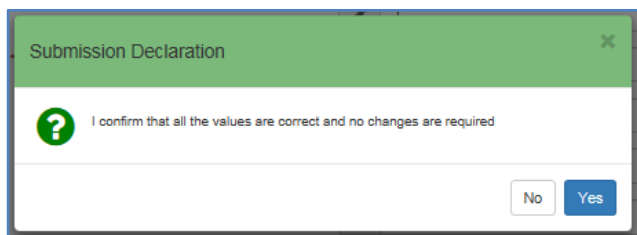

11.7   Once all information has been added or modified, please click the blue **'Submit'** button. If you have entered information and wish to finish this later before submitting, please click the green **'Save Draft'** button. If all of the information has remained the same, please click the green **'No Changes Required'** button.

11.8   If no changes have been required, clicking the green button will bring up the **'Submission Declaration'** screen below. If you are satisfied the information can be submitted please click the blue **'Yes'** button to submit the census. To go back to the previous screen, please click **'No'**.
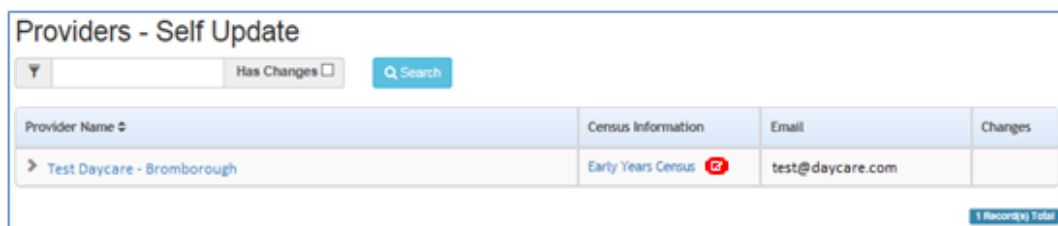
11.9   To submit the census, please click the blue **'Submit'** button. This will bring up the **'Submission Declaration'** screen below. If you are satisfied the information can be submitted please click the blue **'Yes'** button to submit the census. To go back to the previous screen, please click **'No'**.

11.10   If you have saved the census submission to go back and complete later, a small red icon will show next to the 'Early Years Census' link on the provider page.
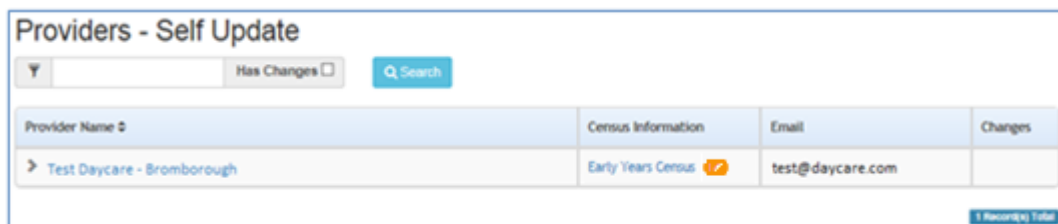

11.11   After submitting the census, a small yellow icon will show next to the 'Early Years Census' link.

(Please note: once the census submission has been approved then no icon will appear. Once the census submission window has finished, the 'Early Years Census' link will no longer be available until the next submission window.)

12. Comments for Local Authority

12.1 During the self-update process, each page will contain a **'Comments for Local Authority'** box. Please use these boxes on each page to add any relevant information which is not already included in the self-update options.