SECTION 1 – LOGIN TO HEADCOUNT PORTAL

Using the Web Address provided in your email.
PLACEHOLDER FOR WEB ADDRESS
Select the address or copy and paste into your Internet Browser address bar.

Login to Headcount Portal by completing the user name and password fields on the login box; then select.

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

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

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

After following the Web Address sent in the confirmation email you will see the confirmation message displayed.
During this login you will be prompted to change your password to a memorable one, this must contain at least 8 characters; and must contain Upper Case, Lower Case and Two Numbers. E.g. **Password01**

Please do not use **Password01** as your new password this is only an example.

Complete the current password, new password, confirm new password fields; and select.

At the Security Details prompt select a secret question and provide a memorable answer; then select.

Congratulations you have now successfully logged in for the first time, and will have access to the Headcount Portal.
SECTION 2 – HEADCOUNT PORTAL NAVIGATION

The Announcements page will be visible at every login, please read these carefully; select continue to proceed to the Homepage.

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

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

Guidance text can be provided, these can be closed but will become visible again on each new login.
Selecting Headcount; Top Left, brings up a menu where you can access any reports that have been provided.

Note: If this page is empty either no reports have been issued or old ones have been cleared out.
SECTION 3 – MESSAGES

When a Message has been issued to your Nursery, all relevant users will receive an email informing them to login. Once you log in to the Headcount Portal you will see the Message on your Homepage.

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

Note: You do not have to delete messages, but they will stay in your Message list and show that you have read them by the icon changing to . The red icon shows how many Tasks or Messages are outstanding.
SECTION 4 – TASKS

When a Headcount Task has been issued to your Nursery, all relevant users will receive an email informing them to login. Once you login to the Headcount Portal you will see the Task on your Homepage.

The task has a Due Date shown in the lozenge, the colour and information on this lozenge changes to show the current status, it will change to Amber and Red the nearer it gets to the Due Date, changing to Grey when the Due Date expires; examples below.

Note: Selecting an expired Task allows you to look at historic information.

Selecting a Task opens the task

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

To add your children to this Headcount Task Select
Complete the relevant fields with the child’s Legal Forename and Surname and select.

Choose the child’s Gender and enter their Date of Birth and select.

Complete the Postcode field and Select all available addresses will be returned.
If the correct Address is returned select it in the list.

Note: If no suitable Addresses are returned you can select and type the new address in.

On the address details page Select

Complete the Ethnicity and First Language fields and select
Note: Keep repeating this process until you have added all relevant children.

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

Complete the hours in each field starting with Average Hours Attended, when you click into the next number field the rest will be self populated based on the financial details stored in the Early Years system. This allows you to leave them if they are correct, or reduce them if the child is claiming less hours.

Select Save
SECTION 5 – Additional Tasks

There are 3 main types of task that you may be asked for. These are:

- **Forecast / Estimate task**
  - You can provide your LA with an estimate headcount

- **Actual / Headcount task**
  - You can provide your LA with your Actual Headcount information

- **Amendment / Adjustment task**
  - You can provide one or more amendments to the Actual Task you submitted earlier in the term
  - This task is the only task designed to come completely pre-populated so you only have to change the claim already made rather than reclaiming all over again
  - This might be to:
    - Add new children who have joined since Headcount
    - Enter End dates against children who have left
    - Amend claims that were inaccurate when the Actual was originally submitted

Please Note – your LA may ask you to complete 1 or more of the types of task above. You should only use the tasks in accordance with your local Terms and Conditions.
SECTION 6 - SUBMISSION

When you have added all your children to the list select Submit on the confirmation screen.

Select [ ] and [ ] on the confirmation screen.

Note: You can continue to add children and hours to this list and resubmitting until the deadline date.

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