

How to Guide – Sufficiency portal

The LA will collect information for our sufficiency assessment via the Online Portal. This guide will provide you with the information you need to submit your places offered/vacancy information onto the Online Portal.

If this is the first time you have used the Online Portal (i.e. if you do not offer early education funding for 2,3 and 4 year olds) the information on the first two pages will help get you started.

If you use the Online Portal to submit your data for the early education funding, please move onto the third page.

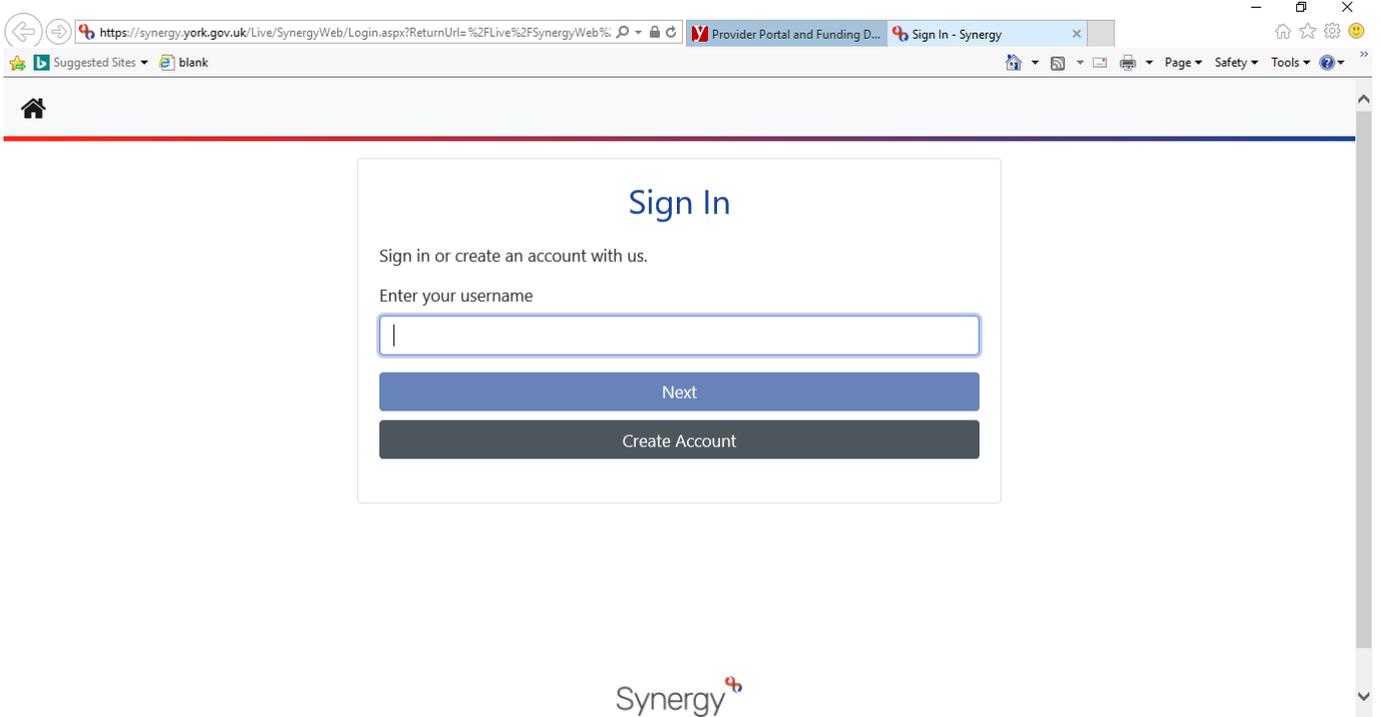
You should already have a user name and password to access the Portal but if you have mislaid these details please call us on 01904 553880 and we can re-set the password for you. Some holiday clubs may not have been issued with login details so please contact us and we can set this up for you.

To access the Portal click on the link below

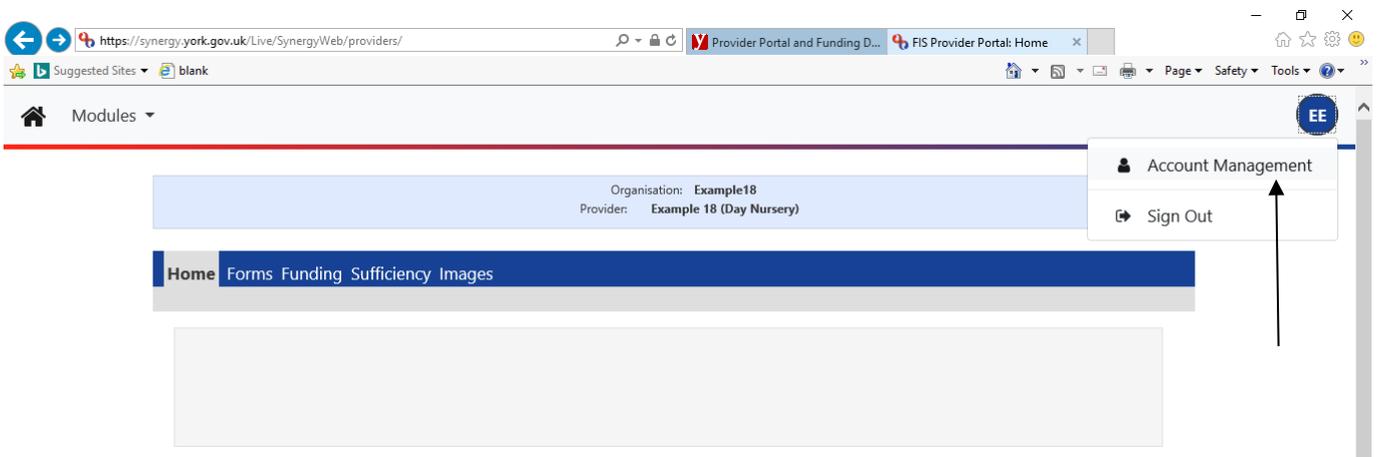
www.york.gov.uk/providerportal and then click on the text in the blue box towards the top of the page.

The screenshot shows a web browser window displaying the YorOK website. The URL in the address bar is <https://www.york-ok.org.uk/workforce2014/Childcare%20Strategy/free-early-years-funding.htm>. The page features a blue header with the YorOK logo and a search bar. Below the header, there are navigation buttons for 'Young People', 'Families', and 'Workforce'. The main content area is titled 'Provider Portal and Funding Documents' and contains a blue box with the text: 'Please click here to login to the York Provider Portal for the early education funding and to update your details'. To the right of this box, there is a list of 'Related pages' and 'Useful documents'. The 'Related pages' list includes 'Funding for 2 year olds', 'Funding for 3 and 4 year olds', and 'Provider Registration for Funded Places'. The 'Useful documents' list includes 'Provider Guide for the delivery of funded places - revised Feb 20' and 'Early Education and Childcare - Statutory guidance for local authorities - June 2018'. A black arrow points from the blue box to the 'Provider Registration for Funded Places' link in the 'Related pages' section.

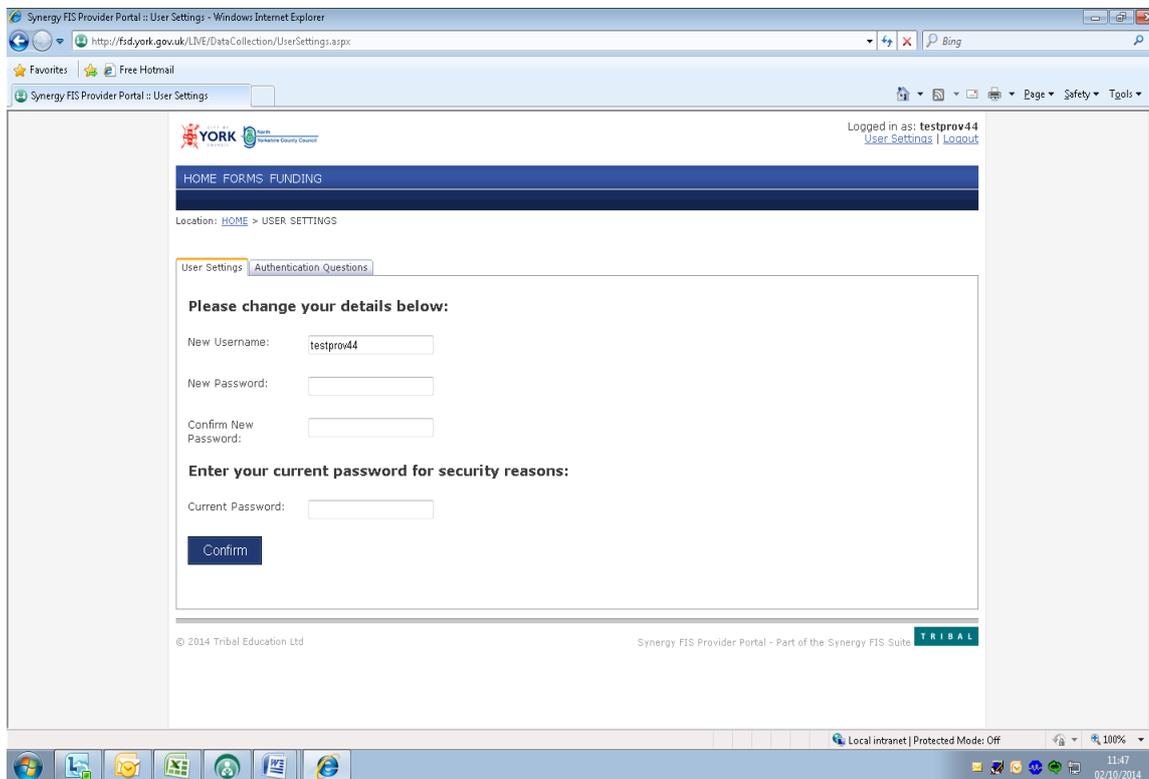
This will take you to the Portal login page. Insert your user name and password (if you have mislaid your login details or have not been issued with details please contact us on 01904 553880 and we can set this up for you).



To change your password to something more secure click on blue circle in the top right hand corner and then click on the [Account Management settings](#) shown in the top right hand corner of the picture below. Passwords should be a minimum of 8 characters. Please note passwords are case sensitive however, usernames are not. Usernames have been set up with no spaces.



After you have clicked on [Account Management](#) you will be taken to the page shown below where you can change your password.



Places Offered

Before starting the process of inputting your vacancies you must identify the places you offer and the ages you offer these places in.

These are the maximum number of early years and childcare places you would offer to parents, per age range, if you had **NO** children in your setting. It is also the maximum number of children you would take which might be different to your registered number (Ofsted may state a maximum of 10 under 2's but your business model might set this number as a maximum of 6 under 2's).

You will be asked about the places you offer across each day of the week, mornings and afternoons. If you are closed or do not offer places on a particular day you need to insert a zero in the box, for example if you do not open at the weekend put a zero in each of these days

If you have one room for all age ranges you **MUST** allocate places to each particular age range that you offer to ensure places are not double counted.

Example

Ofsted have registered your setting as a 40 place 0-5 nursery for sufficiency purposes you must identify how many children you would typically offer places to per age range. Do **NOT** put 40 in each age range as this will distort the actual number of places on offer.

Age	Places	Places
0 to 2	12	40
2 to 3	12	40
3 to 4	16	40
TOTAL	40 ✓	120 X

Schools

We only want to know about early years and childcare provision, so:

If you are a school with a nursery - please only complete the portal for the 3-5 year olds in your nursery/foundation stage provision.

If you are a school which offers before and/or after school provision – please only complete the portal for places relating to the before/ after school provision. Please **DO NOT** include numbers of 5 – 11 year olds in normal (9am – 3pm) school provision.

Childminders

Completing the grid below should help you allocate the places before you enter the numbers onto the portal.

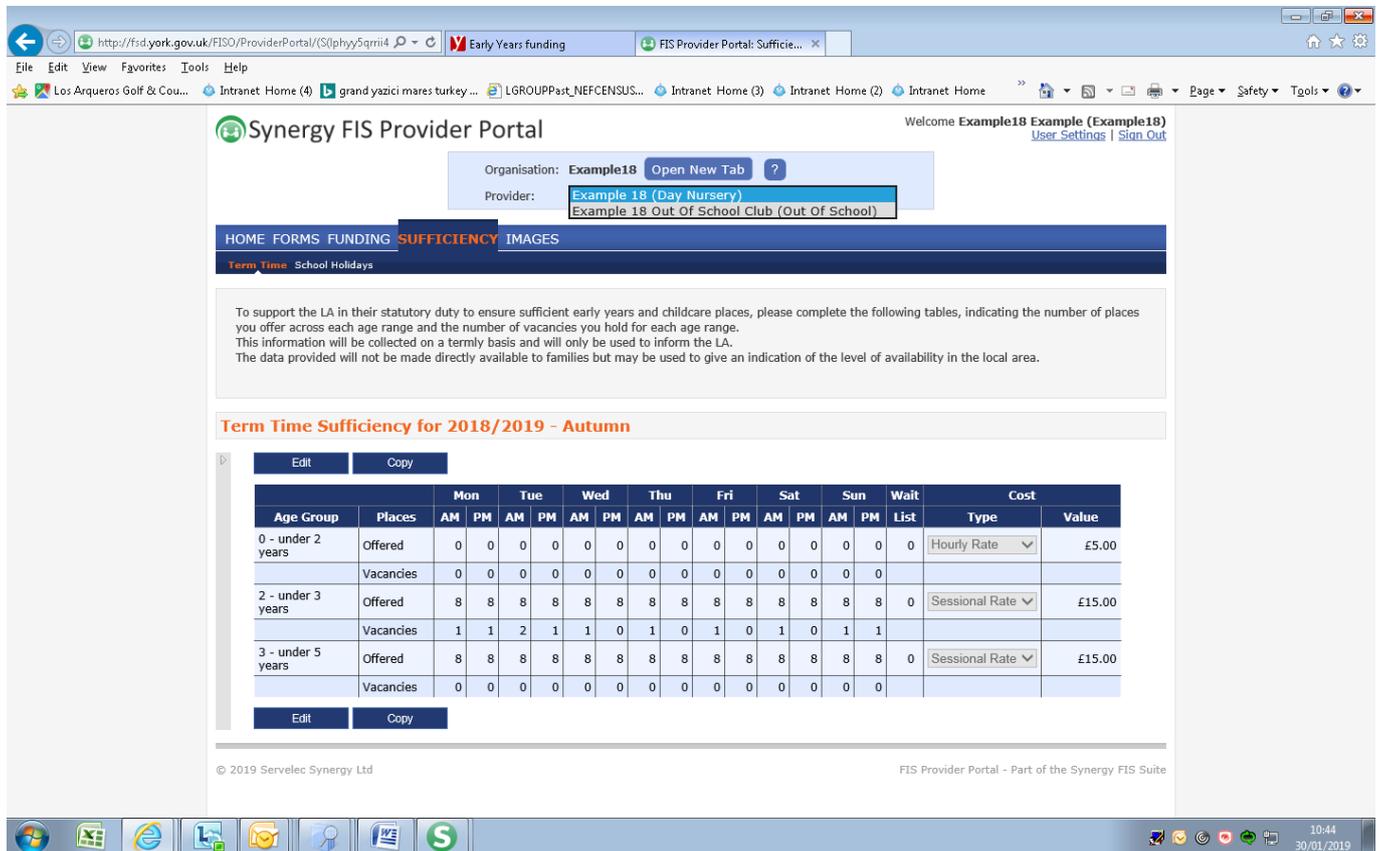
	Age Range	Insert the Number Of Places	Comments
T E R M T I M E	0-2		Childminders can look after one child under one and up to 3 children under 5. You need to allocate your places across the age ranges, to best suit your business. If, for example, you do not offer places to under 2's put 0 and allocate your 3 places across ages 2-3 and 3-5. Do NOT put 1, 2, 2 as this equals 5 not the maximum of 3 children You may want to allocate the places to match the ages of children that you currently have accessing a place.
	2-3		
	3-5		
	5-8 Breakfast		The number of places you offer to children before school for ages 5-8 and/or 8-11. If you do not offer before school places or only offer them in a specific age range put 0 as appropriate.
	8-11 Breakfast		
	5-8 After School		The number of places you offer to children after school for ages 5-8 and/or 8-11. If you do not offer after school places or only offer them in a specific age range put 0 as appropriate.
	8-11 After School		
Over 11		If you offer places to over 11's during Term Time please contact the team on 01904 553880 and we will amend the information for you.	
H O I D A Y S	5-8 Holidays		Places offered during the holidays – it is assumed that if you open all year round that you will offer the same provision detailed above. If your provision is different during the school holidays please contact the team on 01904 553880 And we will amend your settings so that you can access the 'School Holidays' tab on the portal.
	8-11 Holidays		
	Over 11 Holidays		

Vacancies

You need to complete the number of vacancies you have for the current term across each age range, time (morning or afternoon) and day of the week. If you have this information to hand prior to completing the Online Portal it will be quicker.

Selecting a different provision type

If you have more than one provision type, for example a day nursery and out of school club, you will need to provide data for each provision type. You can do this by selecting the correct provision from the drop down menu next to provider in the blue box at the top of the sufficiency screen (see example below).



The screenshot shows the Synergy FIS Provider Portal interface. At the top, there are navigation tabs: HOME, FORMS, FUNDING, **SUFFICIENCY**, and IMAGES. Below the tabs, there is a section for 'Term Time Sufficiency for 2018/2019 - Autumn'. The main content area contains a table with columns for Age Group, Places, and a weekly breakdown of AM and PM sessions for each day (Mon-Sun), along with Wait, Cost Type, and Value columns.

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait	Cost	
		AM	PM		Type	Value												
0 - under 2 years	Offered	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Hourly Rate	£5.00	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
2 - under 3 years	Offered	8	8	8	8	8	8	8	8	8	8	8	8	8	0	Sessional Rate	£15.00	
	Vacancies	1	1	2	1	1	0	1	0	1	0	1	0	1	1			
3 - under 5 years	Offered	8	8	8	8	8	8	8	8	8	8	8	8	8	0	Sessional Rate	£15.00	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0			

Inputting Data

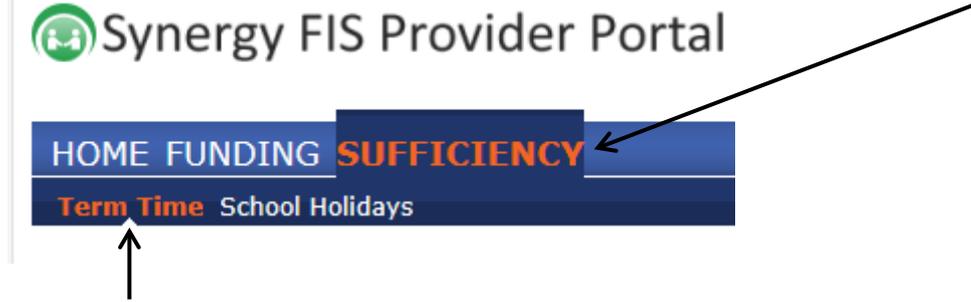
Most settings will only have access to the 'Term Time' only tab and will therefore only have to enter their data under the Term Time tab.

- If you are a **school or playgroup** we will assume you are open term time only. If you are open during school holidays or run a holiday club please let us know and we will amend your parameters.
- If you are **open all year round**, we will assume that the number of places offered /vacancies are the same during the school holidays as in term time. If this is not the case and your numbers are different during school holidays, please contact the team on 01904 553880 and we will amend the settings so that you can also access the 'School Holiday' tab which will allow you to enter different figures for school holidays.

Holiday Clubs – you will be set up so that you have access to the 'School Holidays' tab and not the 'Term Time' tab.

Log on to the Online Portal in the usual way.

At the top of the page you will see a tab labelled Sufficiency – **CLICK here.**



Click - Term Time (orange highlight)

Select the Term and Year - complete for the current term and year.

Select Year and Term

- Summer Term 2018
- 2018/19
- 2017/18
- 2016/17
- 2015/16
- 2014/15
- 2013/14
- 2012/13
- 2011/12
- 2010/11
- 2009/10

CHECK the Age Group List – if there are some ages in the list that you do not offer (for example you only take up to age 8 and there is a line for 8 to 11 year olds) or if some age groups are missing contact the team on 01904 553880 and we will amend this information for you.

Childminders – as your age ranges can vary from term to term we have included all age ranges for your setting. If you do not have any children in a particular age range for the current term, please just enter a zero under the relevant age range.

Making these changes before you start the process will save time now and in future terms.

Click Edit

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Cost	
		AM	PM		Type	Value												
0-2	Offered	6	6	6	6	6	6	6	6	6	6	0	0	0	0		Full Day -10hrs	£45.00
	Vacancies	0	0	0	0	0	0	0	0	3	3	0	0	0	0			
2-3	Offered	40	40	40	40	40	40	40	40	40	40	0	0	0	0		Full Day -10hrs	£40.00
	Vacancies	6	6	8	6	4	5	7	8	2	5	0	0	0	0			
3-5	Offered	60	60	60	60	60	60	60	60	60	60	0	0	0	0	6	Full Day -10hrs	£38.00
	Vacancies	5	5	5	5	5	5	8	8	8	8	0	0	0	0			

The Wait List box allows you to insert the number of children on your waiting list by age for the term of input. Put 0 where you do not have a waiting list	Cost - click the down arrow for a list and select a cost type for example: Hours, Full Day, Half Day.	Value – insert your charge relating to the cost type you have chosen.
Insert the places you offer in the OFFERED box across each day and time. Press the TAB button to move across the page. Put a zero where you do not offer the places.		
Insert the Vacancies you have per age, per day per time. Press the TAB button to move across the page. Put a zero where you do not offer the places.		

— Click Save

Note

- You **MUST** insert a value against each item even if it is zero.
- If you insert more vacancies than places offered you will not be able to submit the information and the following error message will be shown.



Vacancies cannot exceed the number of offered places.

- Remember to contact us if you need the age groups amending.
- If numbers vary across a term, please provide an average figure for that term.
- If charges vary depending on whether a child attends full/part time, has a sibling etc please enter the highest cost that can be charged for that age group.

Once saved the information will automatically be uploaded to our database. If you want to make any changes after you have saved the data click on the edit button to amend the data and then press save.

Copying Information from Term to Term

You can copy the information from one term to the next term. Therefore if your place numbers remain the same you just need to amend the vacancies when an update is requested.

You can also amend places numbers if these have changed.

Click – Copy this opens a window which allows you to select which term you want to copy to.

Copy all the Sufficiency entries from Term Time 2018/19 - Spring to:

Note: for the selected Availability and Year/Term, this will overwrite entries for existing Age Groups and insert entries for missing Age Groups.

Availability * Term Time School Holidays

Year/Term *

	Tu	Fri	Sa
	PM	AM	PM
	0	0	0
	0	0	0
	40	40	0
	1	4	2
	50	50	0
	9	6	7

Select the Year and Term and Term Time (or School Holidays for Holiday Clubs)

Click Submit – the information will then be copied to the term you have selected. If you need to change anything click edit make the amends and then save.

Note

- If the number of places you offer changes alter the place numbers as appropriate. This would allow you to keep within ratios and offer places across different age ranges as appropriate.
- Amend your vacancies to reflect forecast or actual attendance patterns as requested in the email.
- Amend your charges as appropriate on a termly basis.
- If you change your age ranges then you can request an amendment by contacting the team on 01904 553880.