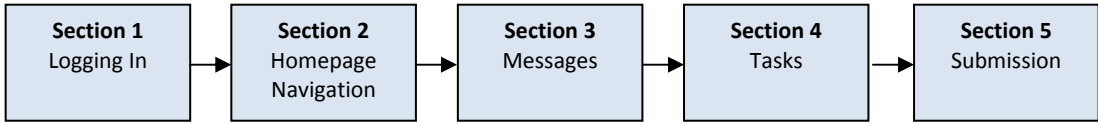




Headcount Portal Users



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.



Log In

Username

Password

Log In

[Forgotten your username?](#)

[Forgotten your password?](#)

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.

Register User

We have sent a confirmation email to your registered email address.

The email contains a confirmation link which will bring you back to the main login page.

You must use this link to continue with your registration.

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.

Registration Confirmed

✓ Thanks, you have confirmed your email address and now may log in

Change Password

Your password must be changed to allow access to the portal.

Current password *

New password *

Confirm new password *

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.

Security Details

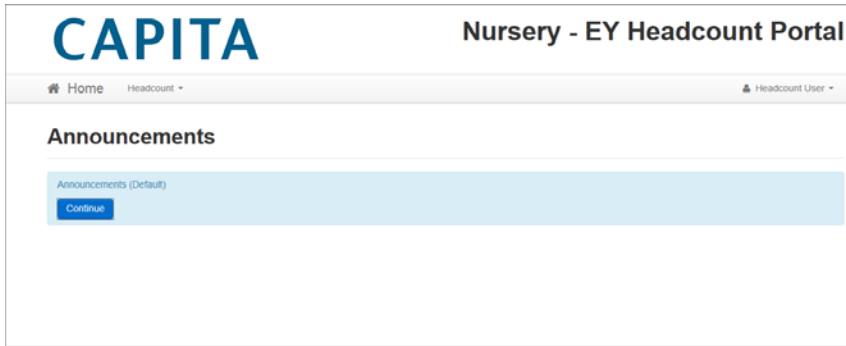
Please choose a secret question and provide an answer

Secret Question *

Secret Answer *

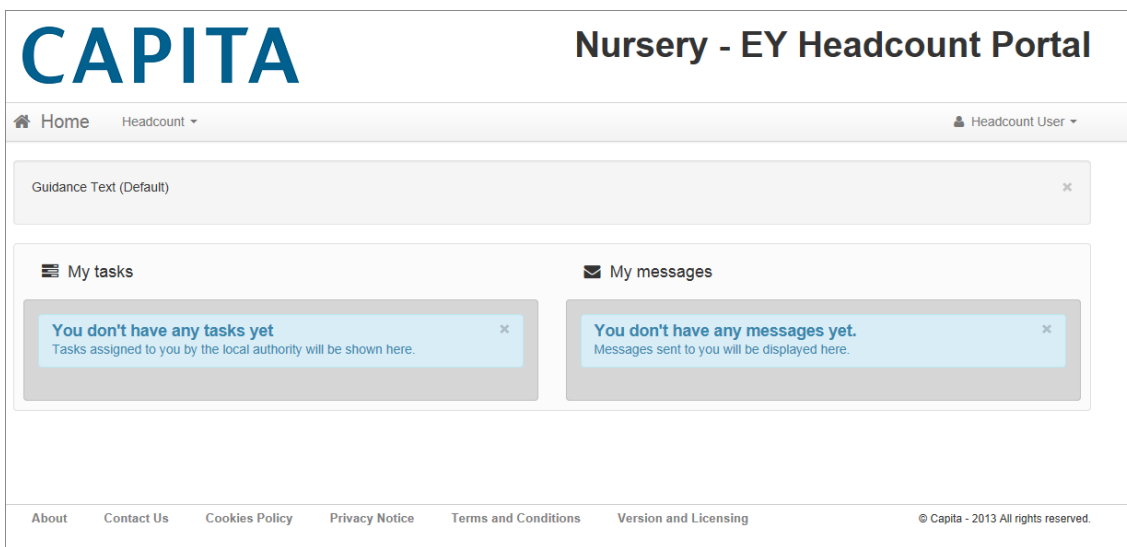
Congratulations you have now successfully logged in for the first time, and will have access to the Headcount Portal.

SECTION 2 – HEADCOUNT PORTAL NAVIGATION

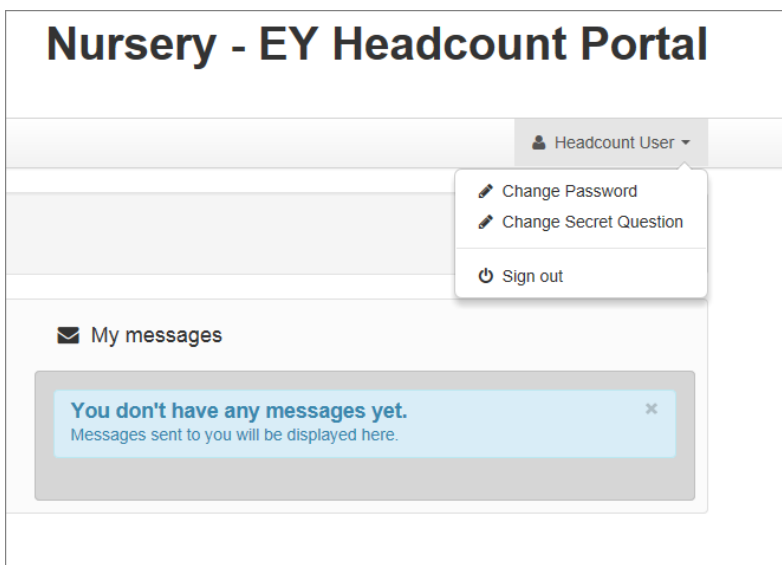


The Announcements page will be visible at every login, please read these carefully; select **Continue** to proceed to the Homepage.

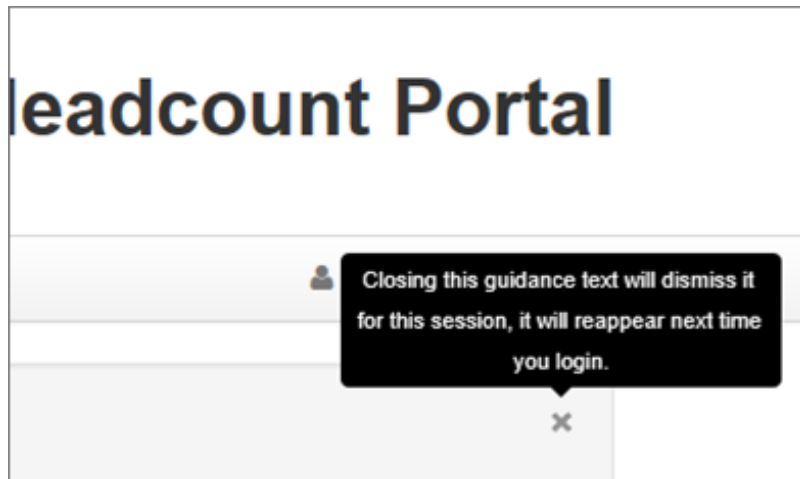
On initial login you may not have any Tasks to complete or Messages to read, the image below shows an empty new users page.



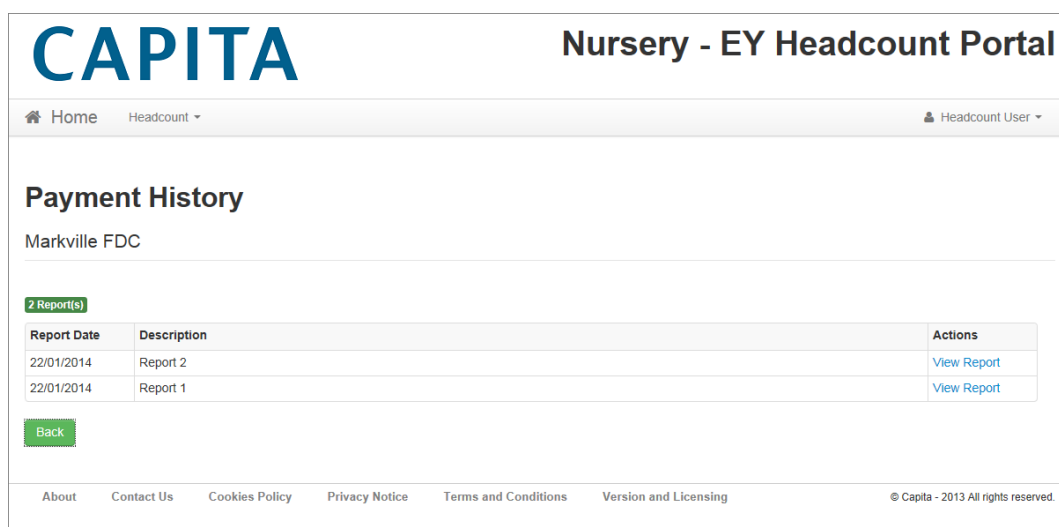
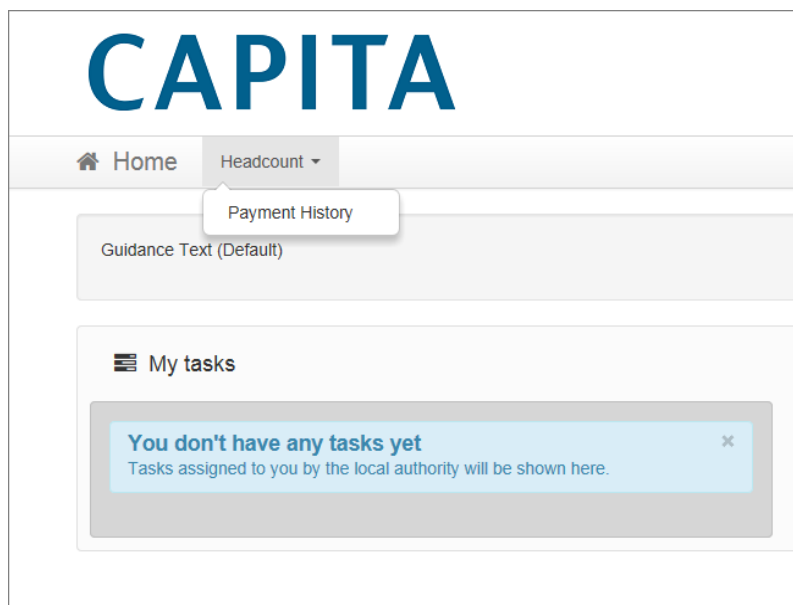
Selecting on your name; Top Right, brings up a menu where you can change your own password or secret question, and log out securely.



Guidance text can be provided, these can be closed but will become visible again on each new login



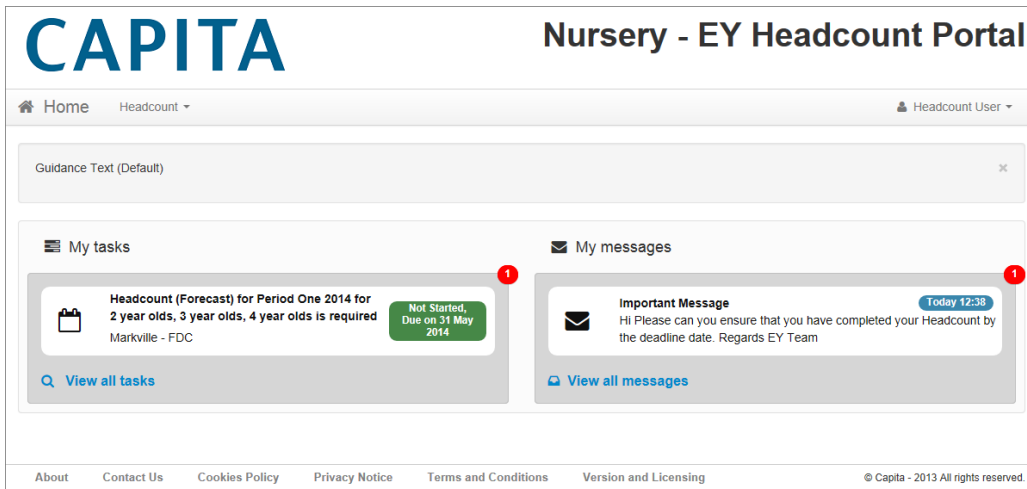
Selecting Headcount; Top Left, brings up a menu where you can access any reports that have been provided.



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

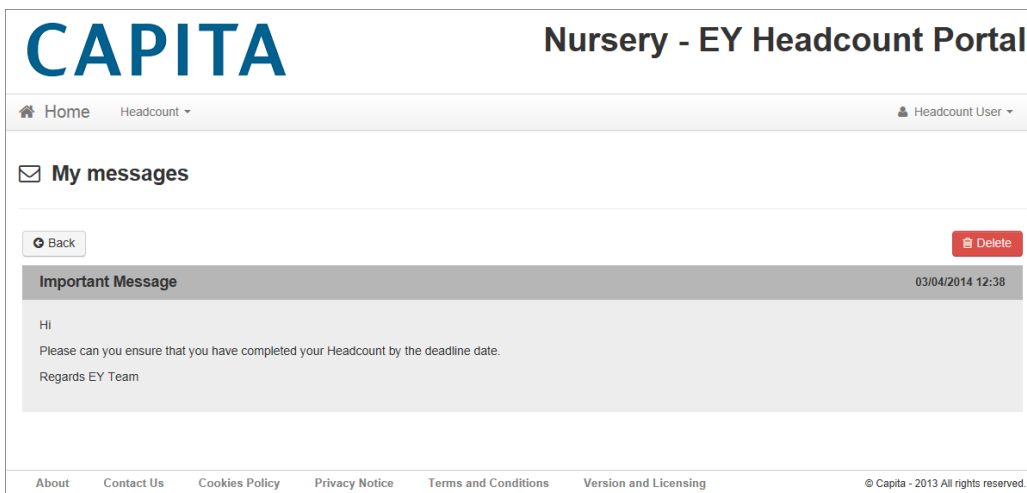
SECTION 3 – MESSAGES

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






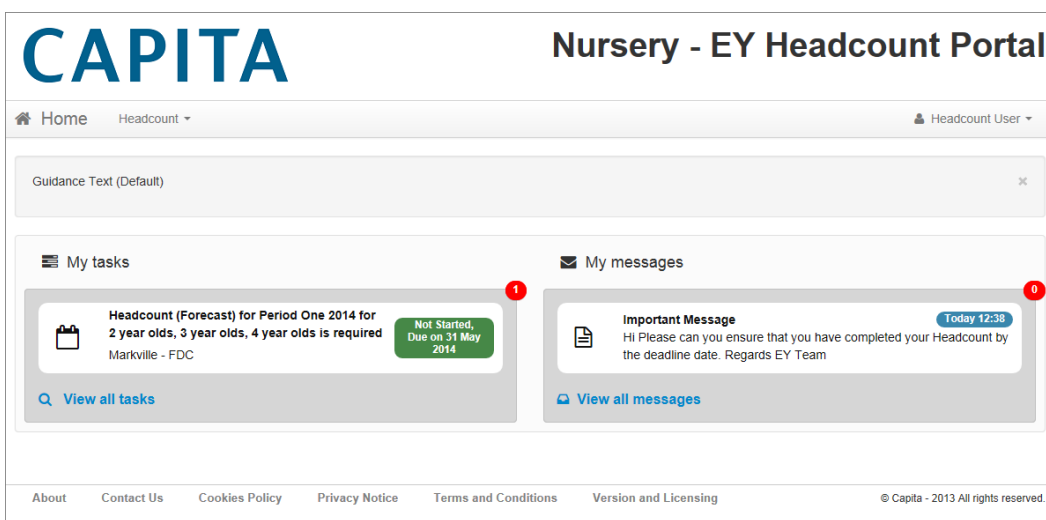
The screenshot shows the CAPITA Nursery - EY Headcount Portal homepage. The header includes the CAPITA logo and the page title. Below the header, there are navigation links for Home and Headcount, and a user profile for Headcount User. The main content area is divided into two sections: My tasks and My messages. The My tasks section displays a task titled "Headcount (Forecast) for Period One 2014 for 2 year olds, 3 year olds, 4 year olds is required" with a status of "Not Started, Due on 31 May 2014". The My messages section displays an "Important Message" with the text "Hi Please can you ensure that you have completed your Headcount by the deadline date. Regards EY Team" and a timestamp of "Today 12:38". Both sections have a "View all" link. The footer contains links for About, Contact Us, Cookies Policy, Privacy Notice, Terms and Conditions, Version and Licensing, and a copyright notice for Capita - 2013.

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



The screenshot shows the CAPITA Nursery - EY Headcount Portal with the "My messages" section selected. The message list shows a single "Important Message" with the text "Hi Please can you ensure that you have completed your Headcount by the deadline date. Regards EY Team" and a timestamp of "03/04/2014 12:38". The message is displayed in a larger view with a "Back" button and a "Delete" button. The footer contains links for About, Contact Us, Cookies Policy, Privacy Notice, Terms and Conditions, Version and Licensing, and a copyright notice for Capita - 2013.

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.

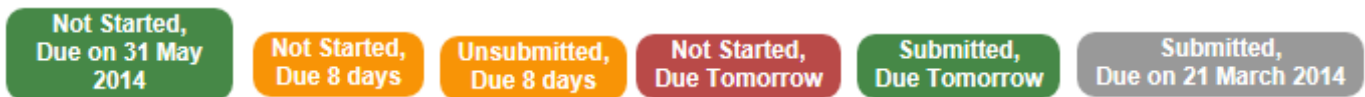


The screenshot shows the CAPITA Nursery - EY Headcount Portal homepage. The header includes the CAPITA logo and the page title. Below the header, there are navigation links for Home and Headcount, and a user profile for Headcount User. The main content area is divided into two sections: My tasks and My messages. The My tasks section displays a task titled "Headcount (Forecast) for Period One 2014 for 2 year olds, 3 year olds, 4 year olds is required" with a status of "Not Started, Due on 31 May 2014". The My messages section displays an "Important Message" with the text "Hi Please can you ensure that you have completed your Headcount by the deadline date. Regards EY Team" and a timestamp of "Today 12:38". Both sections have a "View all" link. The footer contains links for About, Contact Us, Cookies Policy, Privacy Notice, Terms and Conditions, Version and Licensing, and a copyright notice for Capita - 2013.

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 [Add Child](#)

CAPITA

Home Headcount

Add Child

Please enter the child's forename and surname

Forename

Surname

Cancel

Next

Complete the relevant fields with the child's Legal Forename and Surname and select [Next](#)

CAPITA

Home Headcount

Add Child

Personal Details

Contact Details

Other

Forename *

Surname *

Gender * Male
 Female

Date of birth (dd/mm/yyyy) *

Previous

Next

* Required field

Cancel

Save

Choose the child's Gender and enter their Date of Birth and select [Next](#)

Add Child

Personal Details

Contact Details

Other

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 postcode, you can look it up [here](#).

Postcode *

Find Address

Previous

Next

* Required field

Cancel

Save

Complete the Postcode field and Select [Find Address](#) 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 [Enter Address Manually](#) and type the new address in.

Add Child

[Personal Details](#) [Contact Details](#) [Other](#)

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed to the postcode, you can look it up [here](#).

Postcode *

[Find Address](#)

[Enter Address Manually](#)

Church Walk, Marston Moretayne, BEDFORD, Simshire, MK43 0NE
34, Church Walk, Marston Moretayne, BEDFORD, Simshire, MK43 0NE

[Previous](#)

[Next](#)

Add Child

[Personal Details](#) [Contact Details](#) [Other](#)

To find the home address please enter the postcode and click 'Find Address'. If the address is not listed to the postcode, you can look it up [here](#).

House Number *

House Name

Street Name

District / Village

Town

County

Postcode *

[Find Address](#)

[Previous](#)

[Next](#)

On the address details page Select [Next](#)

Add Child

[Personal Details](#) [Contact Details](#) [Other](#)

Ethnicity *

First Language *

[Previous](#)

[Next](#)

* Required field

[Cancel](#)

[Save](#)

Complete the Ethnicity and First Language fields and select [Save](#)

Headcount (Forecast) for 2, 3 & 4 year olds

Status: Edited but not yet submitted

Deadline: 31 May 2014

Markville / FDC / Period One 2014 (01 Apr 14 - 31 Aug 14)

You can edit and re-submit this information at any time until the deadline of 31 May 2014.

	Forename	Surname	Date of birth	Funding Age	Start Date	Leaving Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	Shared Funding
<input type="checkbox"/>	Georgina	Ballerina	31/03/2011	3	01/04/2014			14.00					<input type="checkbox"/>

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[Privacy Notice](#)
[Terms and Conditions](#)
[Version and Licensing](#)
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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 (Forecast) for 2, 3 & 4 year olds

Status: Edited but not yet submitted

Deadline: 31 May 2014

Markville / FDC / Period One 2014 (01 Apr 14 - 31 Aug 14)

Legal Name	Start Date	Leaving Date	Stretched Offer	Weeks Attended for term	Average Hours Attended per week	Hours Attended for term	Hours Claimed per week	Hours Claimed for term	Shared Funding
Georgina Ballerina	<input type="text" value="01/04/2014"/>	<input type="text"/>	<input type="text"/>	14.00	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

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

Headcount (Forecast) for 2, 3 & 4 year olds

Status: Edited but not yet submitted

Deadline: 31 May 2014

Markville / FDC / Period One 2014 (01 Apr 14 - 31 Aug 14)

You can edit and re-submit this information at any time until the deadline of 31 May 2014.

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<input type="checkbox"/>	Georgina	Ballerina	31/03/2011	3	01/04/2014			14.00	34.00	476.00	15.00	210.00	<input type="checkbox"/>

SECTION 5 - SUBMISSION

When you have added all your children to the list select

Submission Declaration

Certification

I certify that the number of hours claimed are correct for each pupil and signed for by the parent /guardians(s) of the pupils. These hours can/will be substantiated by the official registers. I understand that this claim will be subject to an audit at a later date.


I have read the Local Conditions of Funding and agree to comply with them.


I have checked:

- 1) That all parents have signed & completed the number of hours required.
- 2) That hours claimed are based on hours attended for the term.
- 3) That where I am aware that hours are claimed at my setting and another, that added together they do not exceed the maximum entitlement.

Select and on the confirmation screen.

Submit Headcount

 Are you sure you wish to submit this information?

 Attendance submitted successfully !

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

End of document