



Knowsley Early Years and Educations System (EYES)

Establishment Portal

User Guide for Schools and Academies

(March 2024)



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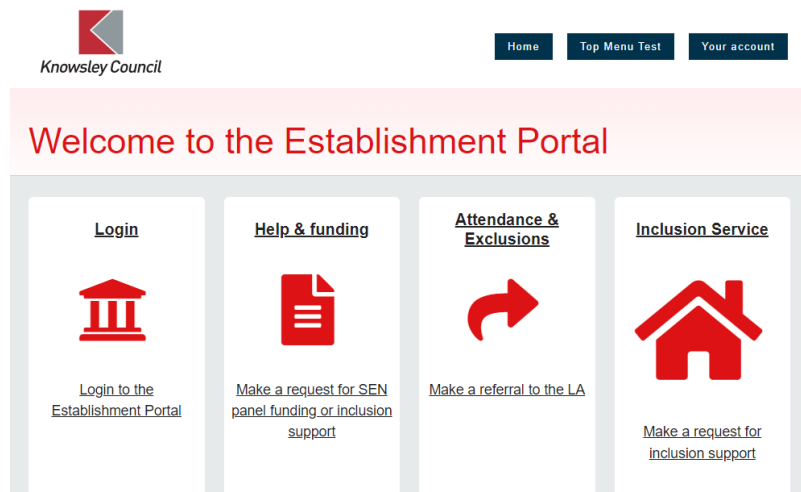
Please Note

For the purpose of this guidance document, all screenshots are from a test system and bare no correlation with any live personal data.

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Register/Log In

Link - [Portal Home \(knowsley.gov.uk\)](https://knowsley.gov.uk)



If you have not used the system before, you will need to email jo.clarke@knowsley.gov.uk with your own provider email address (generic email addresses are not allowed for access to the system) and purpose for use of the system. Once advised that you are set up you will need to click on register for a new account using this email address. If you need one to one support to use the system, then email jo.clarke@knowsley.gov.uk to arrange this.

Click on Login and enter your email address and password.

Secure login - step 1

New to Establishment Portal UAT2? [Register for an account here](#) or use the button below.
Already using Establishment Portal UAT2? Sign in below.

Existing users

Email

Password

For additional security, we will confirm your account by sending an authentication code to your email address.

[Forgotten password?](#)

New users

If you're new to Establishment Portal UAT2, sign up for an account here

You will then get the following screen.

Secure login - step 2

We have just sent you an email to confirm your account. Please enter the code this contains below.

If you can't find this email, it may be in your spam/junk email folder.

Code

[Please send me a new code](#)

You will need to go to your emails, and you should have received an email like below with a verification code. Please note that you will receive a new code each time you log into the establishment portal. Enter the code in the same format as shown below i.e. xxxx xxxx (add a space between the two sets of numbers).

Your custom code for Establishment Portal UAT2 login



No-Reply@knowsley.gov.uk
To: Clarke, Jo



Dear Jo Clarke,

Thank you for using Establishment Portal UAT2. Please enter the following code on the login verification page:

4294 3541

Many thanks,
Establishment Portal UAT2

Once logged in you will automatically be directed to the dashboard.

Dashboard

Overview

Below is an example of what your dashboard may look like. This is an overview of the children you currently have on your live register and shows the status of the current/upcoming headcount.

Knowsley Council

- Home
- Top Menu Test
- Early Years ▾
- Help & funding
- Family Information Service
- Your account
- Jo Clarke ▾

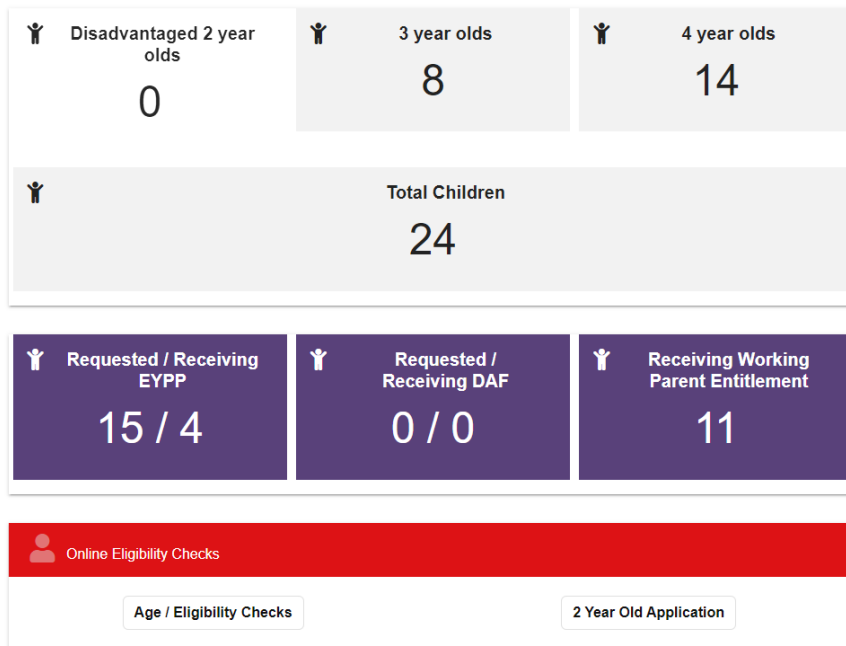
Early Years Dummy Setting ▾

Dashboard

View Messages (0) Refresh

Estimates and Headcounts

A Headcount for Summer term can be submitted from 11-Apr-2024.
No Estimate dates set.



You can click onto each of the boxes above which will then just show you the children within these criteria i.e. all 3-year-olds. To exit this, you will need to click back on the Early Years tab and click on Dashboard to bring you back to this screen.


From the dashboard you will see there are two tabs at the bottom of the screen one is for online eligibility checks and the other for 2 year old applications (for disadvantaged 2YO only).



Age/Eligibility Checks

Use this tab to check the following:

Age / Eligibility Checks

Child's Date Of Birth 

If you are unsure what the funding age is currently for a particular child, you can use this functionality to check.

Age / Eligibility Checks

This child's Funding Age for the current term is 2 year old, next term they will be 3 year old.

Child's Date Of Birth

03-02-2021



Check Age

Reset

To check a child's code to see if they are eligible for funding use the tabs below:

Eligibility Check ?

2 Year Old Check

Working Parent Eligibility Check

2-Year-Old check – this tab is to check funding entitlements for disadvantaged two-year-olds – current 2YO

Eligibility Check ?

2 Year Old Check

Working Parent Eligibility Check

✓ Ref: "3A-VRWU-MI1Z" - Found and Eligible

Does the Parent /
Guardian have a 2 Year
Old Application
Reference Number from
Knowsley Borough
Council?

Yes

No

Enter the reference number, date that proof of eligibility was seen, and child details below (all fields MUST be filled in).

Reference No. * ?

3A-VRWU-MI1Z

Child's Forename *

Tony

Child's Surname *

Testing

Child's Date Of Birth *

01-08-2021



Proof Seen * ?

01-03-2024



Check Eligibility

Reset

Add to Live Register

Once you have done the check here you can add the child to the live register from here (but only if the term has already started for which the child is due to start). If not, you can just use the functionality to check if the child is eligible ahead of the term starting, then go and add the child to the live register once the term has started or you can add the child as a future starter. Click here to go to guidance to add a child to the live register or click here to go to add a child to future starter.

If you have a two-year-old from a working family under the new funding entitlement or a 30-hour code that needs to be checked then use the 'Working Parent Eligibility Check' tab.

2 Year Old Application

You can submit a 2YO application on behalf of a parent using this option.



Once submitted you can view the application status (see page 36) and check the messages in the dashboard.

Early Years Tab

Live Register

Adding a new child

All children attending schools and academies will be added to your legacy system. This information is automatically transferred over to the EYES system but may take a day or two to show up following the start of the term.

Select the child on live register list and click on edit.

Name	Gender	Date Of Birth	Age	Proposed Start Date	Days Per Week	Funded Entitlement	Working Parent Entitlement	Total Hours	Delivery Method
Tony Testing	M	01-Aug-2021	2 year old	01-Apr-2024	5	15.0	0.0	15.0	TTO


Next click on 'Edit Funding Details' tab, then add in the parent / guardian details. If they are a two-year-old from a working family and have a '500' code or a child with a 30-hour code, please ensure this is entered in the box below called 'Eligibility Code'

If you have received consent on the parent declaration form, then click – Consent to Pupil Premium check – EYPP.



Parent / Guardian Details

This should only be the parent/guardian(s) living in the household of the child as declared to HMRC and may not necessarily be the child's biological parent.

Name	DOB	Contact No.	NI No.	NASS No.	Eligibility Code	Pupil Premium Consent
Joan Bloggs	01-Aug-2004	01514435739	AB112233C			Yes  

[Add Guardian](#)

Funding Eligibility Checks

Funding Age: 2 year old

Two Year Old Funded Entitlement

This child is eligible for 2 year old funded entitlement.

[Check Eligibility for 2 Year Old Funding](#)

Working Parent Entitlement

This child is not eligible to claim working parent entitlement.

[Check Eligibility for Working Parent Entitlement](#)

If you have a child who is a '2YO – disadvantaged two-year-old' click on the 'Check Eligibility for 2-Year-Old Funding' tab.

Two Year Old Application Details



Please select from the following options;

**Does the Parent /
Guardian have a 2
Year Old
Application
Reference Number
from Knowsley
Borough Council?**

Yes
 No

Enter the reference number and date that proof of eligibility was seen below (all fields MUST be filled in).

Reference No. *

Proof Seen *

Ok

Close

Enter details the click on 'Ok' then scroll back down to under the parent/guardian field and you should see something like this to show the child is eligible this term:

Funding Eligibility Checks

Funding Age: 2 year old

Two Year Old Funded Entitlement

This child is eligible for 2 year old funded entitlement. Two Year Old Ref No: 3A-VRWU-MI1Z, Proof Seen: 08-Mar-2024

[Check Eligibility for 2 Year Old Funding](#)

Working Parent Entitlement

This child is not eligible to claim working parent entitlement.

[Check Eligibility for Working Parent Entitlement](#)

If the child is not eligible or if the details are incorrect, you will see this sort of message:

Funding Eligibility Checks

Funding Age: 2 year old

Two Year Old Funded Entitlement

Ref: "3A-VRWU-MI1Y" - Not Eligible, the reference number used could not be confirmed.

[Check Eligibility for 2 Year Old Funding](#)

Working Parent Entitlement

This child is not eligible to claim working parent entitlement.

[Check Eligibility for Working Parent Entitlement](#)

Next, add in the attendance details and scroll down.

If you have ticked the EYPP box in the parent / guardian box as shown previously above, then click on 'Perform Pupil Premium Check as shown below:

Attendance Details

Provider Delivery Method	Term Time Only
Days Per Week *	5
Additional Hours ?	0.0
2 Year Old Funded Entitlement ?	15.0
Working Parent Entitlement ?	0.0

Early Years Pupil Premium

If 'Yes' is selected below then an Early Years Pupil Premium receipt will be requested for this child when they are 3/4 years old. This check will be performed automatically when you submit your next headcount. If the child is not yet old enough, you can still add the information now and it will be stored here until the first term after their 3rd birthday.

Do not carry out an eligibility check unless you hold a signed mandate from the parent/guardian(s) consenting to their details being verified with records held by the Department for Work and Pensions (DWP), Her Majesty's Revenue and Customs (HMRC) and the Home Office.

Check for Pupil Premium eligibility Yes No

Consenting Parent/Guardian(s).

Joan Bloggs (DOB: 01-Aug-2004) - AB112233C

Found and eligible - Check Date - 08-Mar-2024

[Perform Pupil Premium Check](#)

If the parent is not eligible for EYPP the following result will show:

Consenting Parent/Guardian(s).
 Joan Bloggs (DOB: 01-Aug-2004) - AB112233C

Not found - Check Date - 08-Mar-2024

Perform Pupil Premium Check

Scroll down and add in a category if this is helpful otherwise click on save.

Categories

Use this section to add tags / categories to this child which can then be used to filter on in the Live Register.

Add a category

+ Add

Categories

Documents

Upload any related documents here

You have successfully saved the child's record as per screenshot below:

The details of Tony Testing have been successfully saved.

Early Years Dummy Setting

Name	Gender	Date Of Birth	Age	Proposed Start Date	Days Per Week	Funded Entitlement	Working Parent Entitlement	Total Hours	Delivery Method	
Tony Testing	M	01-Aug-2021	2 year old	01-Apr-2024	5	15.0	0.0	15.0	TTO	<input type="button" value="Edit"/> <input type="button" value="+"/>

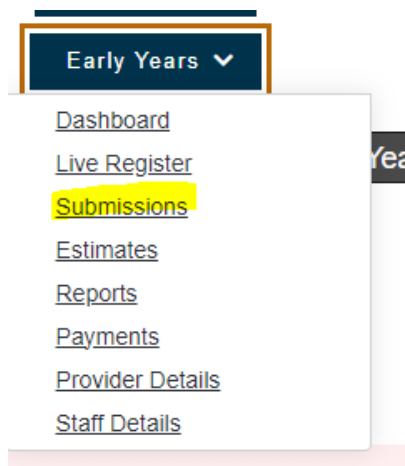
Removing a child from Live Register – If they have left your provision

If a child has left your provision please email earlyyearsheadcount@knowsley.gov.uk to advise as the child will need to be removed from EYES on your behalf. If you see any reception age children showing on your live register you will also need to email to advise for these children to be removed.

Submissions – Headcount

When you have updated your live register and have checked all the details you should be ready to submit your current headcount.

Go to Early Years tab and select Submissions.

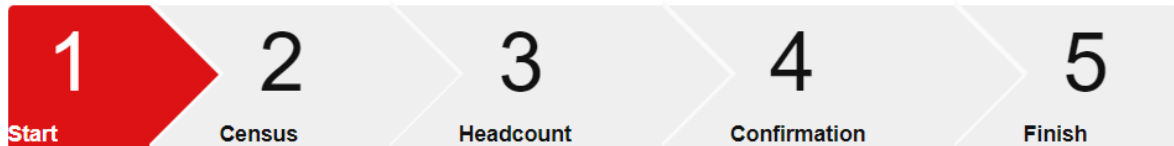


Your account

Jo Clarke ▾

Early Years

Submissions



Refresh

Next



Welcome to the Submissions Wizard.

Click the "Next" button to automatically calculate your headcount based on the children currently in your Live Register.

Click on Next

Next click on claim maximum weeks and all the children's details for weeks attended will be updated to the relevant number of weeks for that term i.e. Spring 11 weeks, Summer 13 weeks and Autumn 14 weeks.

Headcount for Spring 2023/24								
Child	Funding Age	Delivery Method	Weeks	Days Per Week	Additional Hours	Funded Hours Claimed	Working Parent Hours Claimed	Early Year Pupil Premium
LAURA CARTWRIGHT	3YO	TTO	11.0	3.0	0.0	15.0	0.0	<input checked="" type="checkbox"/>
LUCA JONES	4YO	TTO	10.0	3.0	0.0	15.0	15.0	<input checked="" type="checkbox"/>
OLIVE BENNETT	4YO	TTO	11.0	5.0	0.0	15.0	15.0	<input checked="" type="checkbox"/>

Scroll through and check the number of weeks for each child looks correct. If any children are not accessing the full number of weeks may will need edit the child's record or this may be correct as they may only be attending part of the term.

Click on next once you are happy with all the children's details.



Confirmation

It looks like you're ready to submit your headcount. Once you click **Submit** you will no longer be able to make any changes because it will be securely sent to Early Years for approval.

By clicking **Submit** you are confirming that:

- the children on your headcount were attending your setting during Spring 2023/24
- incorrectly claimed funded hours must be repaid
- where parental information has been submitted, signed mandates are held by the setting giving the parent's consent for an Early Years Pupil Premium check to be completed

I Agree * This field is required



Please review the following headcount details.

Term Time Only

0 x 2 Year Olds (Disadvantaged) claiming 0.0 funded hours per week.

10 x 3/4 Year Olds claiming 150.0 universal hours per week and 30.0 working parent hours per week. This adds up to a total of 180.0 hours claimed.

Other Totals

0 children claiming Working Parent Entitlement 9 months - 3 Years.

2 children claiming Working Parent Entitlement 3 / 4 years.

This adds up to a total of 2 children claiming Working Parent Entitlement.

3 children claiming Early Years Pupil Premium.

0 privately funded 2 year olds, 0 privately funded 3 year olds and 0 privately funded 4 year olds.

You will need to tick this box before you can proceed any further but please ensure you have read the check list before proceeding as certain changes may not be possible once the headcount has been submitted. Click [here](#) to review the check list.



Reset

Previous

Submit

Sometimes you may get an error message after you have clicked on submit.



Error

Submission failed:

LUCA JONES

LUCA JONES is not eligible to claim working parent entitlement.

OLIVE BENNETT

OLIVE BENNETT is not eligible to claim working parent entitlement.

You will need to click on reset then go back to the live register and review these children. In the case of these two children above, they are no longer eligible for the working parent entitlement (30 hours funding in this case due to the age of the child) so the code must be removed from the parent/guardian details. Once the children have been updated then you can follow the steps again and submit your headcount.

Submissions



[Return](#)

[Submit](#)



Finished

Thank you, your headcount has been submitted.

Reports

There are several reports available for you to select and download from the portal:

Reports



Reports

Get a report of all Estimates previously submitted.

Estimates

Get reports about children on (or previously on) your live register.

All children currently on your live register

Live Register

Get a report of all entries from the selected Submission.

Please select a Submission

Submissions

Get a report of all Censuses previously submitted.

Census History

Get a report of all previous eligibility checks.

All Checks Performed

Working Parent Entitlement Report

Get reports about children on (or previously on) your live register.

All children currently on your live register

All children currently on your live register

All children not claiming any hours

All children missing ethnicity data

All children who have been removed from your live register

Get a report of all entries from the selected Submission.

Please select a Submission

Please select a Submission

Spring 2023/24 (Headcount)

Spring 2022/23 (Headcount)

Autumn 2022/23 (Headcount)

Get a report of all previous eligibility checks.

All Checks Performed

All Checks Performed


Current Claims

Expired Claims

Grace Period Claims

Get headcount payment receipts.

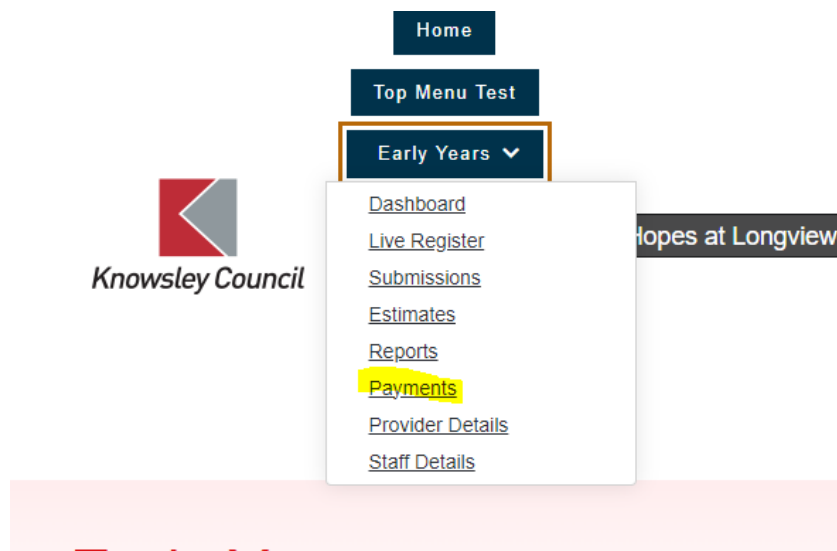
Autumn 2022/23 (Headcount)

 **Payment Receipt**

Please note these reports are no longer available as this has now been moved. See payments information below.

Payments

There is now a new area where you can view your payments. Please note however that these reports still do not show Deprivation payments or mid term claims. These are still in development so should be available in future.



Early Years

Payments for Spring 2023/24

Payments
Payment Totals
Payment Rates

Spring 2023/24

- Under 2
- 2 year old (Working Parent)
- 2 year old (Disadvantaged)
- 3 year old
- 4 year old
- DAF
- Pupil Premium
- Headcount
- Mid-Term Joiner
- Mid-Term Leaver

Apply Filter

Export Payments

First Name	Last Name	Type	Cohort	DOB	Start Date	End Date	Total Hours	Total Weeks	Claim Amount (£)	DAF (£)	Pupil Premium (£)
Daniel	[REDACTED]	Headcount	4 Year Old	08-Aug-2019	01-Jan-2024	31-Mar-2024	165.0	11.0	800.25		
Max	[REDACTED]	Headcount	4 Year Old	17-Jan-2019	01-Jan-2024	31-Mar-2024	165.0	11.0	924.00		99.1
Ava	[REDACTED]	Headcount	4 Year Old	04-Jun-2019	01-Jan-2024	31-Mar-2024	165.0	11.0	825.00		
George Samuel	[REDACTED]	Headcount	4 Year Old	21-Sep-2019	01-Jan-2024	31-Mar-2024	165.0	11.0	825.00		

Payments for Spring 2023/24

Payments
Payment Totals
Payment Rates

Total Payment: £29,972.25

Period Start: 01-Jan-2024
Period End: 31-Mar-2024

Estimate	Headcount	Mid-Term Changes	DAF
Total	£0.00	Universal £29,477.25	Joiners £0.00
Advance	£0.00	Working Parent £0.00	Leavers £0.00
		Pupil Premium £495.00	Total £0.00
		Total £29,972.25	

Cohort Payments

Age	Headcount	Joiners	Leavers	Total
3 year old	£13,101.00	£0.00	£0.00	£13,101.00
4 year old	£16,871.25	£0.00	£0.00	£16,871.25
Total	£29,972.25	£0.00	£0.00	£29,972.25



Payments Payment Totals **Payment Rates**

Cohort Payment Rates

Age	Rate Category	Amount
2 Year Old (Working Parent)	Base rate	£7.00
2 Year Old (Working Parent)	Pupil Premium rate	£0.66
2 Year Old (Disadvantaged)	Base rate	£7.50
2 Year Old (Disadvantaged)	Pupil Premium rate	£0.66
3 Year Old	Base rate	£4.45
3 Year Old	Pupil Premium rate	£0.60
3 Year Old	Quality rate 1	£0.40
4 Year Old	Base rate	£4.45
4 Year Old	Pupil Premium rate	£0.60
4 Year Old	Quality rate 1	£0.40

The function below will export the funding breakdown into an excel spreadsheet.



Payments Payment Totals Payment Rates

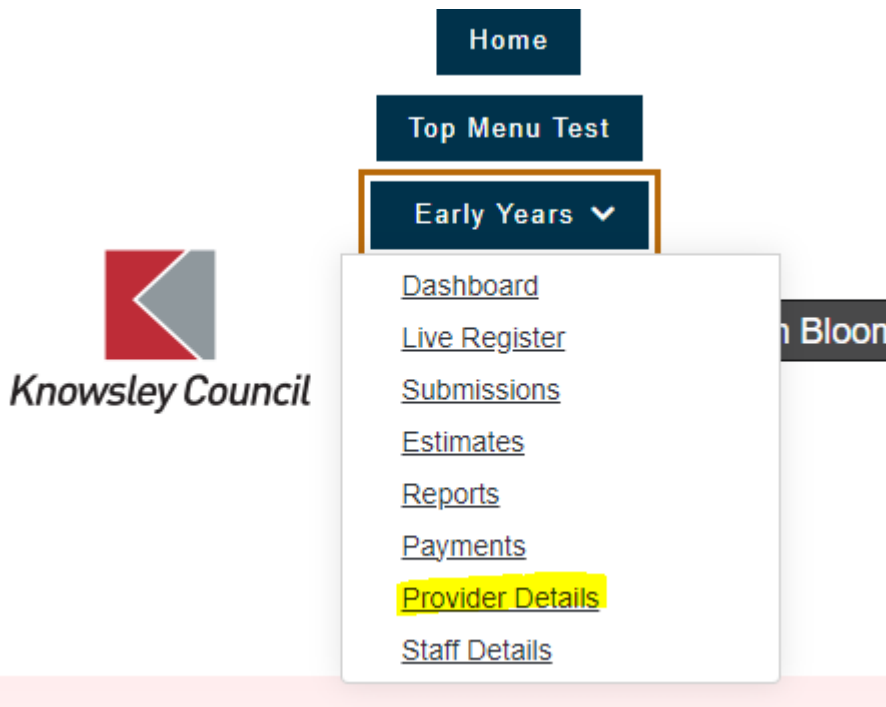
Spring 2023/24

- Under 2
- 2 year old (Working Parent)
- 2 year old (Disadvantaged)
- 3 year old
- 4 year old
- DAF
- Pupil Premium
- Headcount
- Mid-Term Joiner
- Mid-Term Leaver

Apply Filter

Export Payments

Provider Details



You can view your settings details here and advise earlyyearshadcount@knowsley.gov.uk if anything needs to be updated. You can however update your opening times here and your provider availability as per below.

Opening Times

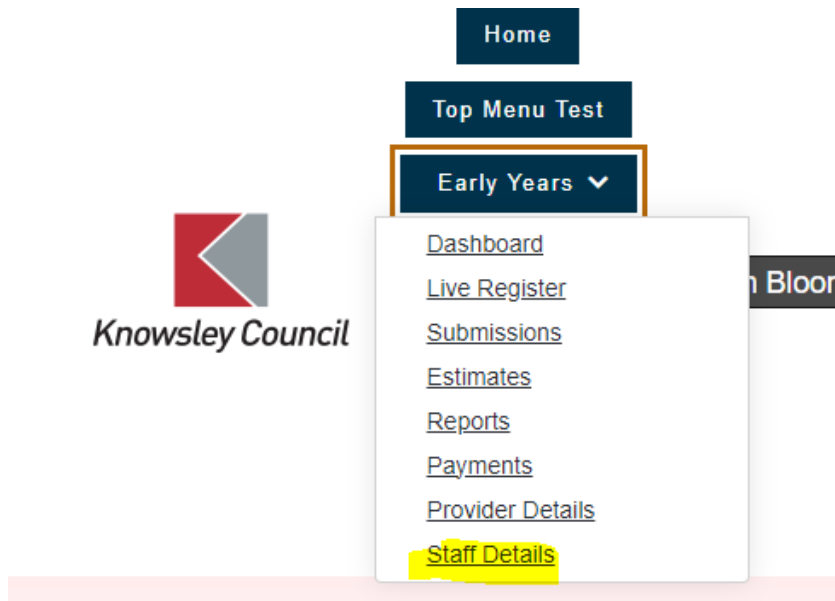
Day	Open	Opening Time ?	Closing Time ?
Monday	<input checked="" type="radio"/> Yes <input type="radio"/> No	07:30 ⌵	17:50 ⌵
Tuesday	<input checked="" type="radio"/> Yes <input type="radio"/> No	07:30 ⌵	17:50 ⌵
Wednesday	<input checked="" type="radio"/> Yes <input type="radio"/> No	07:30 ⌵	17:50 ⌵
Thursday	<input checked="" type="radio"/> Yes <input type="radio"/> No	07:30 ⌵	17:50 ⌵
Friday	<input checked="" type="radio"/> Yes <input type="radio"/> No	07:30 ⌵	17:50 ⌵
Saturday	<input type="radio"/> Yes <input checked="" type="radio"/> No	--:--	--:--
Sunday	<input type="radio"/> Yes <input checked="" type="radio"/> No	--:--	--:--

Provider Availability


- All Year Round
- Term Time Only

Click on Save once you have made changes.

Staff Details



You need to add in your staffing including qualifications. Please do not enter any personal details as this is not necessary and we don't want to have this information recorded on the portal. Please keep this information up to date as this will impact on the census for the Spring Term headcount.

 Staff Details




This page allows you to record each member of staff and all of their qualifications. The DfE requires you to report a series of statistics about your staff and their levels of qualification. These statistics are calculated based on the staff details entered on this page.

For staff who do not have contact time with any child, leave un-checked the 'Works with children aged under 5' box e.g. administrative support or kitchen staff. Additionally, you can also check staff who volunteer (e.g. parents on a reading rota). Both volunteers and staff who do not work with children aged under 5 are NOT included in the summary submitted to the DfE.

When you add a member of staff, you can include extra information about their contact details, emergency contact details and any training they have completed. This will not be returned to the DfE or your local authority and are for your records only.

You can add all qualifications a staff member holds from a drop down list from the DfE that are considered 'full and relevant'. If the qualification is not listed then you will not be able to record it. You will need to know whether the qualification was gained before or after September 2014, as this was when major changes took place to align older qualifications.

Add Staff
Summary

 Staff Details			
Name	Job Title	Highest Qualification	Contact Details 
Jo Clarke	Manager	Level 5	Email Address - jo.clarke@knowsley.gov.uk Phone Number -  01514435739

 Edit Staff

 Staff Details

Forename *

Surname *

Previous Surname

Job Title *

Email

Phone Number



Works with children aged under 5 * Yes No

Is a Manager * Yes No

Is an apprentice Yes No

Is a volunteer Yes No

First Day * 

Last Day  

 Staff Address

Building name

Number

Street

Town

Locality

County

Postcode

 Search Again

Emergency Contact Details

Name

Relationship

Phone Number

Qualifications

Name	Level	Before 1st September 2014	Remove
A Higher National Diploma in: Early Years, Early Childhood Studies, Childcare or Playwork	5	Yes	<input type="button" value="x"/>

[Add Qualification](#)

Training

Paediatric First Aid Yes
 No

Safeguarding Yes
 No

Fire Marshall Yes
 No

Manual Handling Yes
 No

Forest School Yes
 No

[Save](#)

Help & Funding

Help & funding

Make an application for SEN panel funding.

[Apply for SEN panel funding](#)

Make a request for inclusion support.

[Request inclusion support](#)

For Help & Funding guidance documents go to [Headcount - EYES Provider Portal User Guides](#)
[| Knowsley Info](#)

Family Information Service

Submit Content for the Family Information Service

[Complete FIS Form](#)

The FIS form will show your setting information for parents to make an informed decision about where they may be interested in placing their child or may help the parents to decide where they wish to visit settings to view for a potential place.

Please complete your details. Once a form has been submitted, you can complete another form, and this will pre-populate information you have previously submitted so you can just go to the information you want to amend and update this information without having to re-enter all the information.

- 1** **Contact Details** >
- 2** Age Ranges >
- 3** Opening Hours >
- 4** Costs >
- 5** Local Offer >
- 6** Additional Information >
- 7** Upload Assets for your Page >
- 8** Summary >
- 9** Consent >
- 10** Submit to LA >

There are a few tabs of information to update.

1 Contact Details > **CONSENT**

2 Age Ranges >

3 Opening Hours >

4 Costs >

5 Local Offer >

6 Additional Information >

7 Upload Assets for your Page >

8 Summary >

9 **Consent** >

10 Submit to LA >

If you would also like information about your childcare offer/provision available online to parents seeking childcare, could you please indicate below.

I am happy for you to make my information available in writing, in print, by email, phone and face to face *


Yes
 No

Please include my details in the online childcare directory *

Yes
 No

For the online childcare directory, do you want us to publish your full address or just your postcode? *

Publish my full address
 Publish my postcode only

 Please note that if you have not ticked any of the boxes above, your information will not be provided to parents seeking childcare.

You need to tick Yes to both as per above if you wish for you setting to be available on the parent portal when a parent is looking for childcare. We are going to ask all providers to update their information to be able to launch the parent portal search facility during the summer term 2024.

Your Account

Help & funding

Make an application for SEN panel funding.

[Apply for SEN panel funding](#)

Make a request for inclusion support.

[Request inclusion support](#)



Online Eligibility Checks

[Age / Eligibility Checks](#)

[2 Year Old Application](#)

If you have submitted any of these forms above or done a 2 year old application then these will show in the application tab as per below.

Any portal messages sent out to providers will show in the messages tab.

The screenshot shows the Knowsley Council portal navigation menu on the left, including links for Home, Top Menu Test, Early Years, Help & funding, Family Information Service, Your account, and a user profile for Jo Clarke. A dropdown menu for 'Early Years' is open, showing 'Early Years Dummy Setting'. Below the navigation is the 'Applications' section, which includes a sidebar with links for Forms to complete, Saved Forms, Messages, Applications (highlighted), and PEP Forms. The main content area contains a light blue box stating 'This section lists all the other applications you have made' and a 'My Applications' section with a 'Select Period to View' dropdown set to 'Last Month' and the text 'No items'.

Messages relating to payment receipts or children who may be about to fall out of eligibility will show here:

The screenshot shows the 'Dashboard' section with a red header. On the right, there are two buttons: 'View Messages (1)' and 'Refresh'. Below the header is a red banner with a person icon and the text 'Estimates and Headcounts'. Underneath, a white box contains the message: 'A Headcount has already been submitted for Spring term. A Headcount for Summer term can be submitted from 11-Apr-2024. No Estimate dates set.'

Dashboard

Close Messages

Refresh



Messages

No.	Sent	Expires		Subject
1	08-Mar-2024	15-Mar-2024	!	Spring 2023/24 - Headcount Payment Summary Published



Messages

No.	Sent	Expires		Subject
1	07-Mar-2024	21-Mar-2024	!	EY 2 Year Old Application Successful for [REDACTED]
2	07-Feb-2024	31-Mar-2024	!	[REDACTED] has entered their Grace Period for claiming extended entitlement.
3	21-Jan-2024	31-Mar-2024	!	[REDACTED] has entered their Grace Period for claiming extended entitlement.