EYIF Provider Portal User Guide

Contents

1. How to log into portal for the first time

1. You will receive an email from EYIF@southwark.gov.uk with your username and instructions.

2. Visit eyif.southwark.gov.uk and click "**Sign in**."
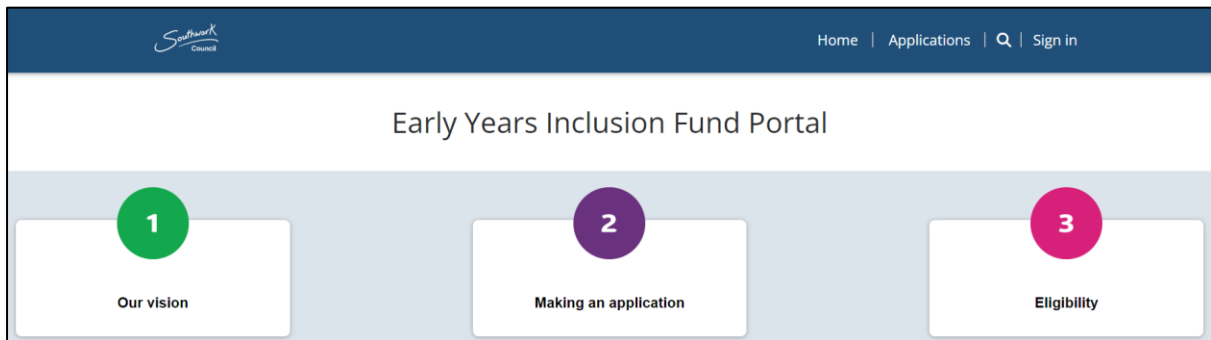
3. On the next page, click "**Login**."

4. Click "**Forgot your password?**"

5. Type in your username (this is your email) and click "**Send verification code**".

6. You will receive a verification code via email. Type in this code and then click "**Verify code**."

7. When email address verified, click "**Continue**."

8. **PLEASE NOTE**: You may be asked to verify again. If so, repeat steps 5 – 7.

9. Create your new password and then click "**Continue**."

10. You should now be able to sign in and see you provider name in the top corner of the page.

2. How to create a consent

1. From the homepage, click on "**Applications**" and then select "**Create Consent**."
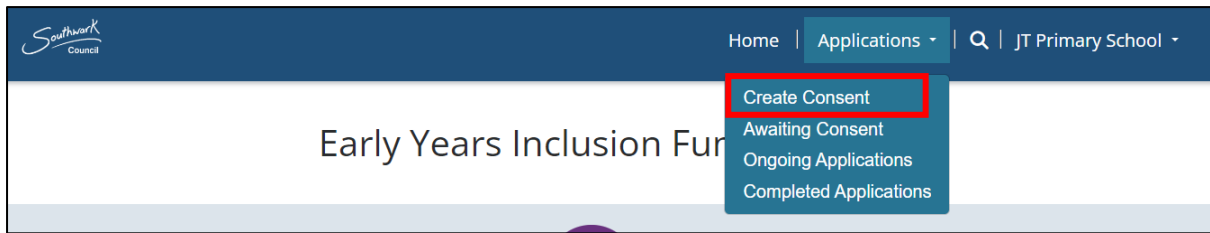
2. Read through the information page and then click "**Next**."

3. Complete all the details and then click "**Next**".

4. Complete the parents' details and then click "**Request Consent**".

   (If the parent does not have an email address, tick the "no parent email" box and you can input mobile number instead)

5. Confirmation page will now show stating "The consent agreement has been successfully sent to the parent for signature."

3. How to find consents still awaiting parents' signature

1. From the homepage, click on "**Applications**" and then select "**Awaiting Consent**."
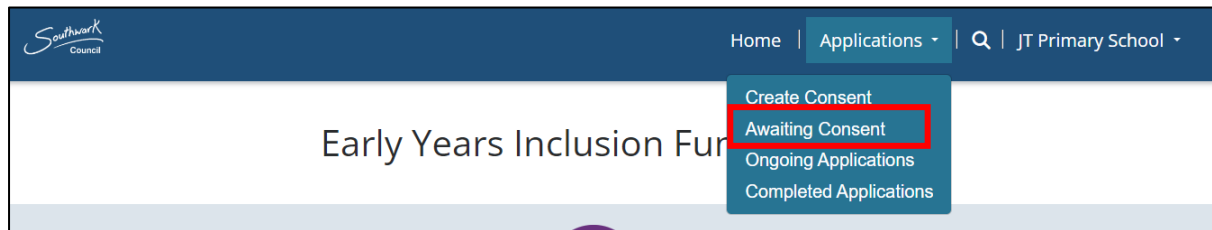
2. You will then see a list of consents that have been sent and not yet signed by the parent.

4. How to start an application

4.1 Completing Application form.

1. Once you and the parent have completed the consent stage, an application will automatically be created.

2. From the homepage, click on "**Applications**" and then select "**Ongoing Applications.**"
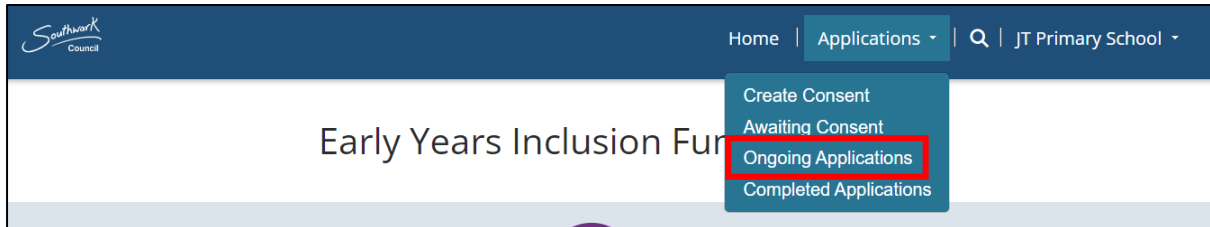
3. You will then see a list of ongoing applications and their status.

4. To edit and complete an application, click on the blue arrow, and click "**Edit**".
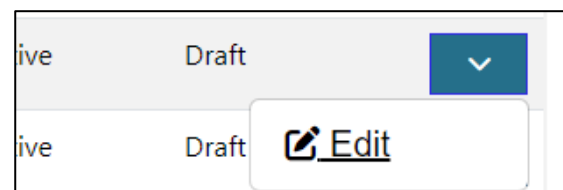
5. The first page of the application will open. Here, you will complete:
   - Provider Representative
   - Child's Details
   - Provider Details

   (Some of these will be pre-filled from the completed consent form)

6. Once the page is completed, click "Next" at the bottom of the page.
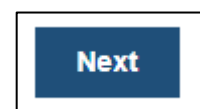
7. One the second page you will complete the following:
   - Applications Details
   - Child's Ethnicity
   - Child's Languages Spoken
   - Child's Details
   - Additional information relating to the Applications Type
   - Attached any supporting documents required.

*You can save the application at any time if you want to come back and complete it later. Just click "**Save**" at the bottom of the application.

Previous	Save

4.2 Adding Ethnicities and Languages

CHILD'S ETHNICITY

⊕ Create

Ethnicity

There are no records to display.

LANGUAGES SPOKEN AT HOME

⊕ Create

Language

There are no records to display.

1. Click on the blue "**Create**" button.

⊕ Create

2. Click on the "**magnifying glass**" icon.

Create

Ethnicity

🔍

Submit

3. Click the "**check box**" for the Ethnicity required and then click "**Select**".

   You can use the search box to help filter down the options.

4. Click "**Submit**"

5. You can add multiple Ethnicities and Languages if required. If any are added by accident you can delete them by clicking on the blue arrow and then "**Delete**."

6. To add Languages, follow the same process as Ethnicities.

4.3 Attaching supporting documents.

Attached Files

Name ↑	Uploaded On
There are no records to display.	

Attach Files (At least one file must be attached to send the application for signature, with a maximum of five files)
Choose Files | No file chosen

1. Click on the "**Choose Files**" icon.

Attach Files (At l
Choose Files | Nc
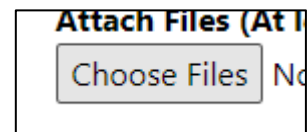
2. Search for and select the file you wish to upload. *(You can select multiple files or do one at a time).*

3. Once you have selected the file(s) click "**Save**"

Attach Files (At least one file must be att
Choose Files | 2 files

Previous | Save

4. Confirmation page will pop up, click "**Back to Application**".

Application saved!

The application saved successfully.

Back to home page | Back to application

5. Scroll to the bottom and click "**Next**" to get back to second page.

6. You will now see the file that you uploaded.

Attached Files

Name ↑	Uploaded On	
2024-09-03T13:14:35.3826312Z_Test Doc 1.pdf	03/09/2024 2:14 PM	⌄
2024-09-03T13:14:35.6566363Z_Test Document 2.pdf	03/09/2024 2:14 PM	⌄

7. To delete a document, click the blue arrow and select "**Remove Attached Document**".

Uploaded On	
03/09/2024 2:14 PM	⌄
03/09/2024 2	Remove Attached Document

4.4 Sending Application for final signature and submission.
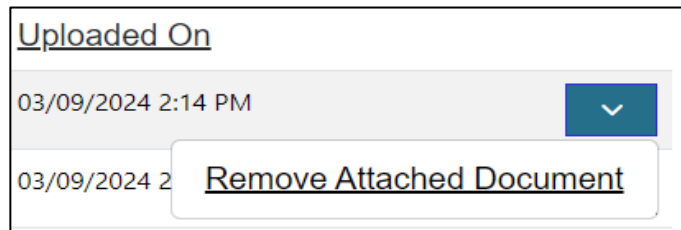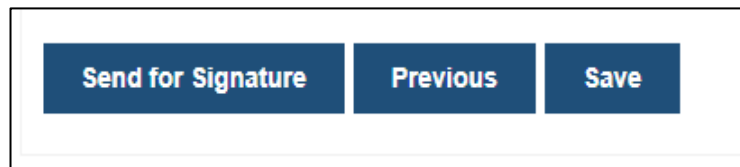
PLEASE NOTE: When making a group application you should **not include the names of individual children in the main part of the application**. This is because this information will be sent to the parents **of all the** children in the group for the final consent before submission. As this is a group application, the application is based on the similar needs of the children so they may be referred to as a group.

1. Once you have completed all the mandatory fields and attached at least 1 document you will be able to see the Send for Signature button.

Once you have sent for signature you will no longer be able to change any details within the application.

2. Scroll to the bottom of the application and click "**Send for Signature**".

Send for Signature	Previous	Save

3. Confirmation pop-up will show, click "**Proceed**".

Send for Signature Confirmation

Are you sure you want to send this application for signature?

Proceed	Cancel
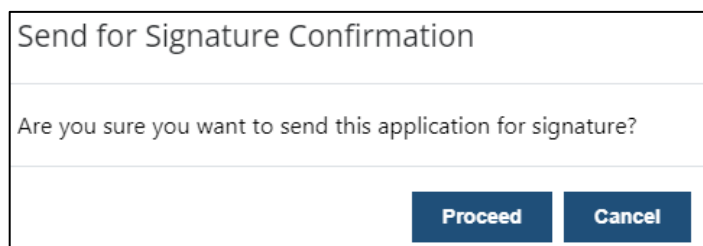
4. You have now sent the application to the parent/guardian to sign. Once this has been signed, it will automatically be submitted to the EYIF team at Southwark.

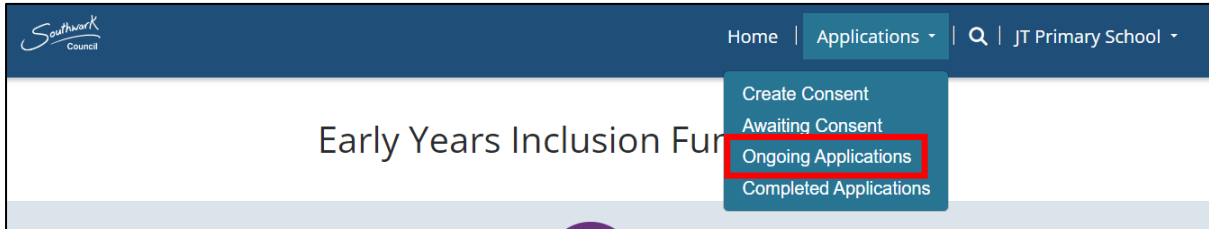# 5. How to manage ongoing applications.

5.1 How to see all ongoing applications.

1. From the homepage, click on "**Applications**" and then select "**Ongoing Applications.**"

2. You will see a list of your ongoing application and their current status reasons.

5.2 How to provide further information if required.

1. The EYIF team at Southwark may require further information or supporting documents. If this is the case the status reason on the application will change to "**Further Information Required**."

2. Click on the blue arrow and select "Edit."
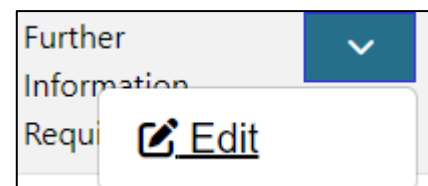
3. Scroll down to the Portal Comments section and you will see the comment from the Southwark representative.

Portal Comments

Add comment

4 minutes ago
Modified on 03/09/2024 2:36 PM

Please attach document for XYZ and confirm the child is doing 15 hours per week

4. To reply or upload a document, click the blue "**Add Comment**."

5. Add your response and upload a file if required.

   Click "**Submit**" to send the reply.

Add a Comment

Comment	Please see attached. Yes the child is doing 15 hours per week.
Attach a file	Choose Files Test Doc 1.docx

Submit   Cancel

6. Your response has now been sent.

6. How to see completed applications

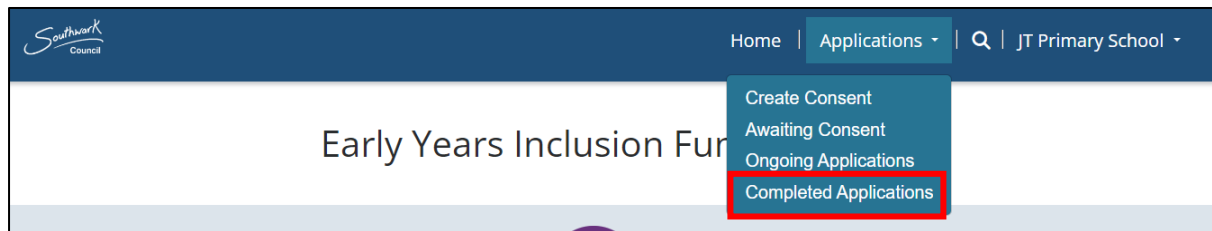1. From the homepage, click on "**Applications**" and then select "**Completed Applications.**"

2. You will then see a list of the completed applications and their outcomes.

7. Status reasons and their meanings

Status reason	Meaning
Draft- in 'Awaiting consent'	The first parental consent to begin the application has been requested but not yet given
Draft- in 'Ongoing applications'	• Parental consent to begin the application has been requested and the application form has been generated, is editable and ready to be completed. • The application is completed and final parental consent to submit the application has been requested but not yet given. • Parental consent to submit the application has been given (please note the designated contact will receive and email to confirm this) and the submitted application is ready to be picked up by the Early Years Inclusion Team
In Progress	The EYIF team have acknowledged receipt of the application, and it has been assigned to a panel and a case reader for recommendation
Ready for panel	The application is ready for final decision at panel
Further information required	Further information is required to process the application. Further information will be given in the portal comments within the application
Approved- in 'Completed applications'	Funding for the application has been approved

Not approved- in 'Completed applications'	Funding for the application has not been approved
Paid- in 'Completed applications'	Funding has been paid to the provider