

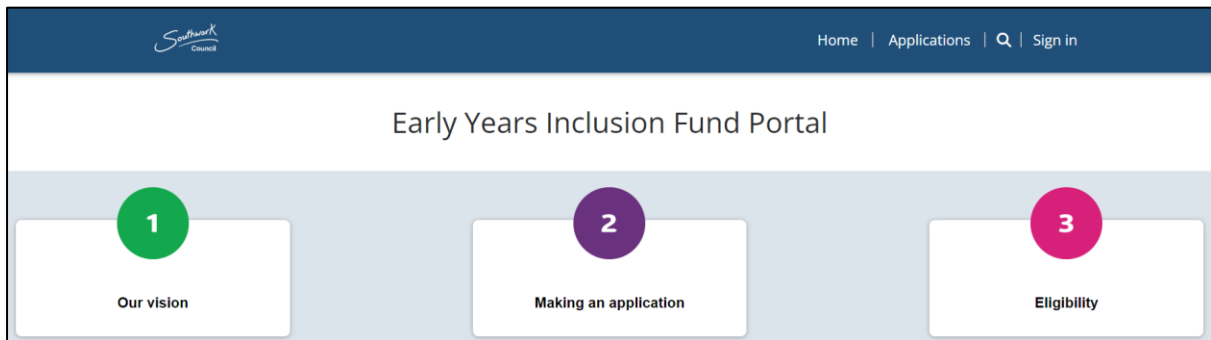
EYIF Provider Portal User Guide

Contents

1. How to log into portal for the first time	2
2. How to create a consent.....	4
3. How to find consents still awaiting parents' signature	5
4. How to start an application	6
4.1 Completing Application form.....	6
4.2 Adding Ethnicities and Languages.....	7
4.3 Attaching supporting documents.....	9
4.4 Sending Application for final signature and submission.....	10
5. How to manage ongoing applications.....	11
5.1 How to see all ongoing applications.....	11
5.2 How to provide further information if required.	11
6. How to see completed applications	13
7. Status reasons and their meanings	13

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.”**

This form is titled "Sign in with an external account". It features a single text input field and a blue "Login" button positioned below it.

4. Click **“Forgot your password?”**

The form is titled "Sign in" and includes the sub-heading "Sign in with your email address". It contains two text input fields: "Email Address" and "Password". Above the email field is the text "Please enter your Email Address" in red. Above the password field is the text "Please enter your password" in red. Below the password field is a blue link that says "Forgot your password?". At the bottom of the form is a blue "Sign in" button.

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

The form is titled "User Details" and features a text input field labeled "Email Address". Below the input field is a blue button labeled "Send verification code".

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

The form is titled "User Details" and includes the text "Verification code has been sent to your inbox. Please copy it to the input box below." Below this text is a text input field containing the number "640279". At the bottom of the form are two blue buttons: "Verify code" and "Send new code".

7. When email address verified, click **“Continue.”**

The screenshot shows a 'User Details' page. At the top, it says 'User Details' in a large font. Below that, a message reads 'E-mail address verified. You can now continue.' There is a light blue box containing the text 'Email Address'. Below this box are two blue buttons: 'Change e-mail' and '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.”**

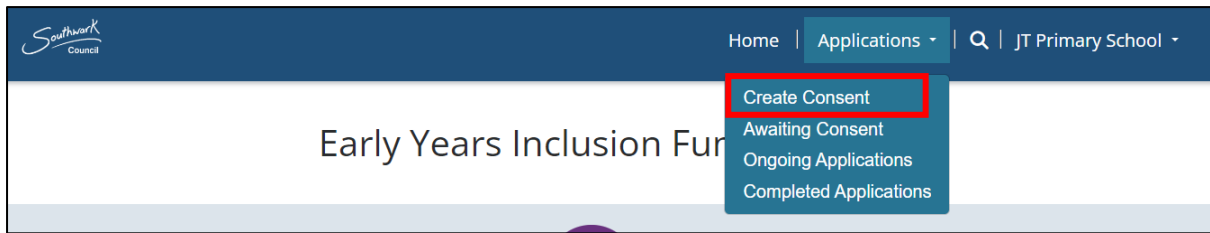
The screenshot shows a 'User Details' page. At the top, it says 'User Details' in a large font. Below that, a red message reads 'New Password is required.' There are two input fields: 'New Password' and 'Confirm New Password'. Below these fields is a blue button labeled 'Continue'.

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

The screenshot shows the top of a website. The header is dark blue with the Southwark Council logo on the left and navigation links 'Home | Applications - | Q | Demo School -' on the right. Below the header is a white box with the text 'Early Years Inclusion Fund Portal' centered inside.

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**”.

Consent Details

Application type *
Tier One

Your first name *
John

Your last name
Smith

Your role *
Admin

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)

Parent Details

No Parent Email

Parent's first name *
[Text Input]

Parent's second name *
[Text Input]

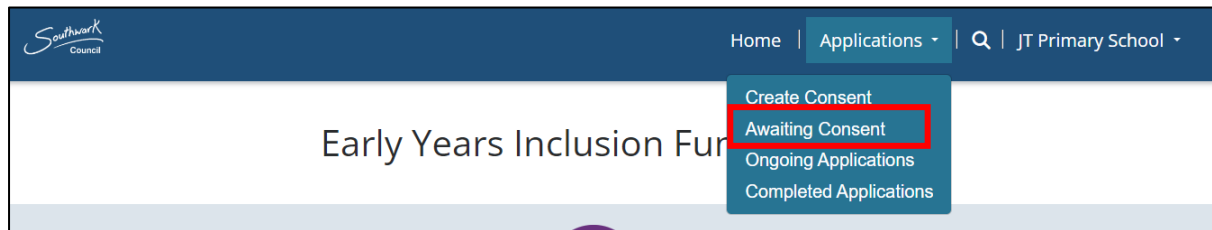
Parent's email *
[Text Input]

Previous **Request Consent**

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.

Awaiting consent

These consents have been submitted to the parents but are awaiting signature for the application process to begin

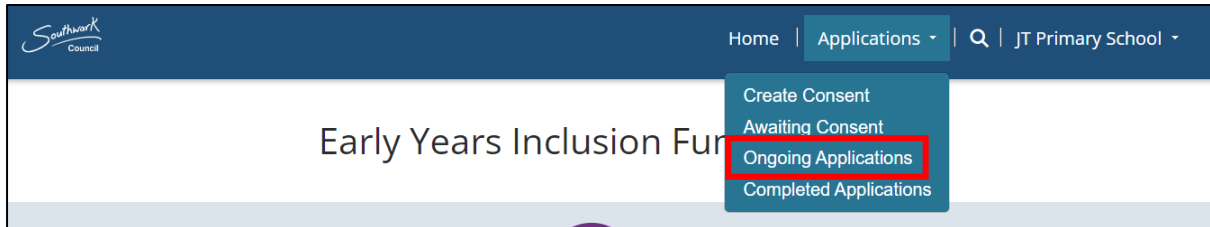
☰ Portal Awaiting Consent ▾ 🔍

<u>Consent ID</u>	<u>Consent Type</u>	<u>Parent1 First Name</u>	<u>Parent 1 Last Name</u>	<u>Created On</u>	<u>Status Reason</u>
C-001081	Tier One	James	Thomas	30/08/2024 9:09 AM	Draft

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.

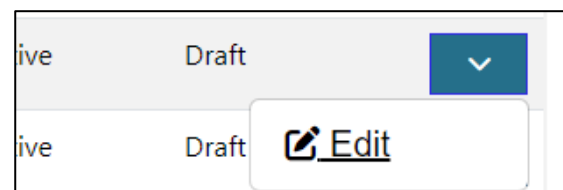
Ongoing Applications

List of application submitted and waiting for approval by Southwark

☰ Ongoing Applications ▾ 🔍

Application ID	Full Name (Child Details)	Date of Birth	Funding Type	Provider	Status	Status Reason	
AP-1062	Ted Smith	24/10/2023	Tier one	JT Primary School	Active	Draft	▾
AP-1059	Laura lead	13/09/2023	Group	JT Primary School	Active	Draft	▾

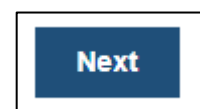
4. To edit and complete an application, click on the blue arrow, and click “**Edit**”.



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.



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.



2. Click on the “**magnifying glass**” icon.

Create

Ethnicity

- Click the “**check box**” for the Ethnicity required and then click “**Select**”.

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

Lookup records

white

<input type="checkbox"/>	MWAP	White and Pakistani
<input type="checkbox"/>	MWBA	White and Black African
<input type="checkbox"/>	MWBC	White and Black Caribbean
<input type="checkbox"/>	MWCH	White and Chinese
<input type="checkbox"/>	MWOE	White and Any Other Ethnic Group
<input type="checkbox"/>	WCOR	White - Cornish
<input type="checkbox"/>	WEEU	White Eastern European
<input checked="" type="checkbox"/>	WENG	White - English

≤ 1 2 ≥

- Click “**Submit**”

Ethnicity

WENG

- 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.**”

Ethnicity

WENG	<input type="button" value="v"/>
ABAN	<input type="button" value="v"/>
AAFR	<input type="button" value="Delete"/>

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

4.3 Attaching supporting documents.

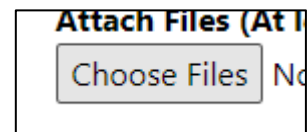
Attached Files

<u>Name</u> ↑	<u>Uploaded On</u>
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)

No file chosen

1. Click on the **“Choose Files”** icon.



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 attached to send the application for signature, with a maximum of five files)

2 files

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

Application saved!

The application saved successfully.

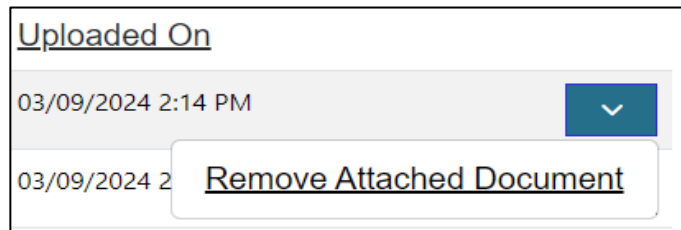
5. Scroll to the bottom and click **“Next”** to get back to second page.

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

Attached Files

<u>Name</u> ↑	<u>Uploaded On</u>	
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**”.



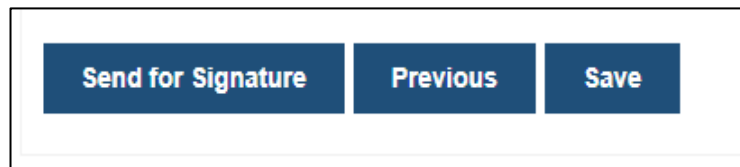
4.4 Sending Application for final signature and submission.

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.

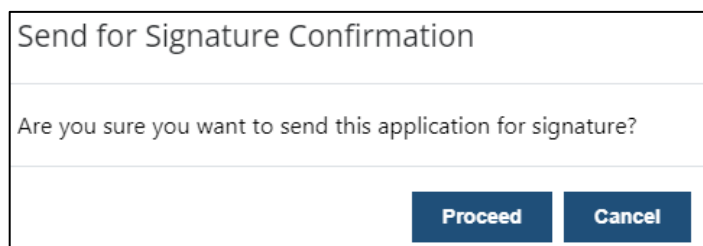
1. Once you have completed all the mandatory fields and attached at least 1 document you will be able to see the Send for Signature button.

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**”.



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

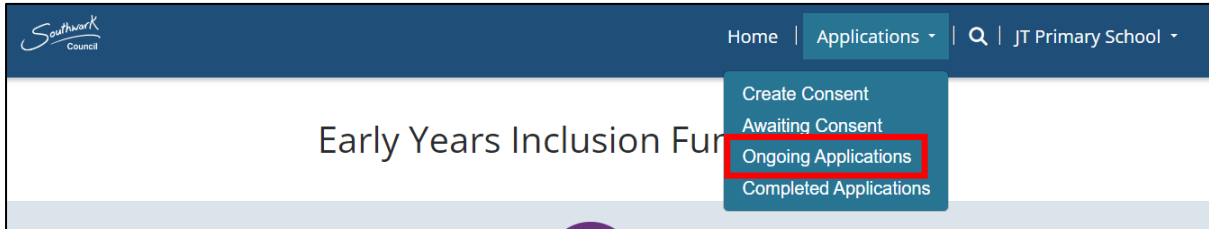


4. You have now sent the application to the parent/guardian to sign. Once this has been signed, it will automatically be submitted to the EYIF team at Southwark.

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.

Ongoing Applications

List of application submitted and waiting for approval by Southwark

☰ Ongoing Applications ▾ 🔍

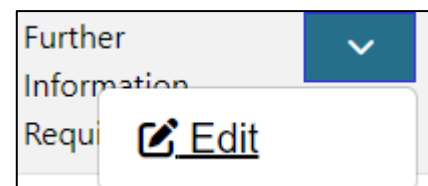
<u>Application ID</u>	<u>Full Name (Child Details)</u>	<u>Date of Birth</u>	<u>Funding Type</u>	<u>Provider</u>	<u>Status</u>	<u>Status Reason</u>	
AP-1007	Jimtest Smithtest	10/04/2024	Tier one	TEST School	Active	New	▾
AP-1008	TEST Baby TEST Gosling	21/10/2021	Tier two	TEST School	Active	Ready for Panel	▾

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.**”

<u>Application ID</u>	<u>Full Name (Child Details)</u>	<u>Date of Birth</u>	<u>Funding Type</u>	<u>Provider</u>	<u>Status</u>	<u>Status Reason</u>	
AP-1007	Jimtest Smithtest	10/04/2024	Tier one	TEST School	Active	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](#)

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

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

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 ✕

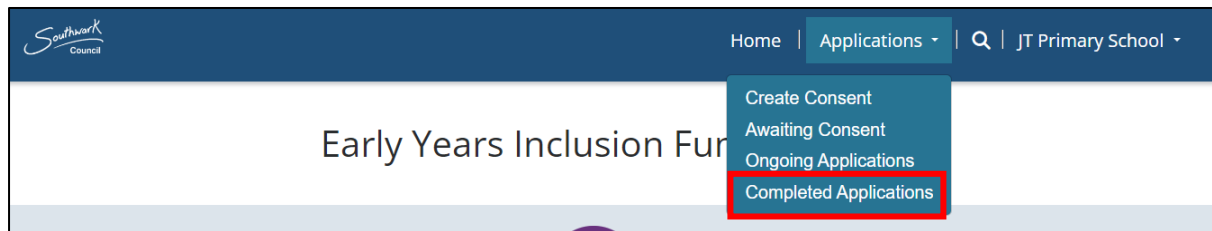
Comment

Attach a file Test Doc 1.docx

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.

Completed Applications						
List of all completed applications						
						Search <input type="text"/>
Application ID ↑	Full Name (Child Details)	Date of Birth	Funding Type	Provider	Status	Status Reason
AP-1007	Jimtest Smithtest	10/04/2024	Tier one	TEST School	Active	Approved <input type="button" value="v"/>

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'	<ul style="list-style-type: none"> • 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