

Education Portal – Account Set Up & Log In

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Introduction

This guide explains how to set up an account and log into The Education Portal.

The Education Portal is an online system used for the administration of funded places. The Portal is used to check the validity of 2 year old reference numbers, Working Parent Entitlement codes and eligibility for Early Years Pupil Premium (EYPP) and Disability Access Fund (DAF). Providers submit a claim for funding through the portal every term.

The Education Portal is 'self-service,' individuals set up and manage their own accounts. Access to the setting record is managed by The Early Education Team.

Education Portal Access

Before you can start to use The Portal you will need to have access to your settings account approved. Due to the nature of the data held in The Portal, access is managed by The Early Education Team. You will need to complete a form to have your access approved. You can register for an account on The Portal without completing an access form but you will not be able to see any details relating to your setting.

Before completing the form you will need:

- Ofsted URN for your provision
- The email address you will be using to log into The Education Portal
- Permission from the Ofsted Registered Person; Company Director or Headteacher to request access.

Step 1: Access Form

Visit the [Education Portal Access web page](#). Read the information carefully. Follow the link to the access form. Complete the form. Click 'Submit.' On submission you will receive a confirmation receipt email, keep a copy of this for your records.

Step 2: Form Processing

Your form will be processed by The Early Education Team within 5 working days. The team will contact you with any queries relating to your request.

Step 3: Access Approved

You will receive a confirmation email when your portal access has been approved. If you haven't already done so, move onto the next section to register for a portal account. Please note it can take up to 24 hours for your access to become live

Registering for an account

Visit The Education Portal website to create an account. This registers your email address as a portal user. **Generic email addresses should not be used.**

Step 1: Go to the portal website

Visit the website, click on 'Login.'

Welcome to the Establishment Portal

The screenshot shows a navigation bar with three main sections: 'Login', 'Help & funding', and 'Attendance & Exclusions'. Under 'Login', there is a blue building icon and a red arrow pointing left, with the text 'Login to the Establishment Portal' below. Under 'Help & funding', there is a blue document icon and the text 'Make a request for SEN panel funding or inclusion support' below. Under 'Attendance & Exclusions', there is a blue curved arrow icon and the text 'Make a referral to the LA' below.

You will come to the Login page. Find the 'New users' section on the right, click 'Register for a new account.'

Secure login - step 1

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

The screenshot shows a login form with two main sections: 'Existing users' and 'New users'. The 'Existing users' section has fields for 'Email' and 'Password', a 'Submit' button, a 'Cancel' button, and a 'Forgotten password?' link. The 'New users' section has a blue button labeled 'Register for new account'. A red arrow points to this button.

Step 2: Create a new account

Input the required information in the form that appears. Click 'Next' to move forward.

Input your email address (this must be the address confirmed on the access form) and select a password. Note the password policy which is there to help you chose a secure password. Click 'Next.'



Register a new account - step 2

Email address *

Password *

Confirm password *

Password policy

Your password must meet the following requirements:

- It must be at least 12 characters long
- It must contain at least one letter
- It must contain only letters, digits, and special characters
- It must contain at least one upper-case letter
- It must contain at least one numerical digit
- It must contain at least one special character.
- It must be different to your current password
- It must be different to your previous 8 passwords.

[Click here to see the list of special characters.](#)

The system will send a confirmation message to the email address you have registered. The email contains an 8 digit code, copy the code and input this into the field on screen. **This verifies your email address.**

Register a new account - step 3

We have just sent you a new email to confirm your email address. Please enter the code this contains below. Use the back button below if you would like to change your email address and try again or [Please send me a new code](#) if you need another one.

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

Code *

[Please send me a new code](#)

Click 'Next,' and your registration will be completed.

Registration completed

Your registration has been completed successfully. Click [Continue](#) to carry on with your session.

If your Education Portal access has already been approved, click 'continue' to log in and view your setting's account. If not wait until your receive the access approved email.



Using the Education Portal

When your account is set up and your portal access is approved, you can start to use The Education Portal. Save the [link to the portal](#) in your favourites for easy access.

Two factor authentication

The Education Portal is kept secure by using a ‘two factor authentication’ every time you log into your account, similar to online shopping and banking.

When you login with your email address, the system sends a code to that address for you to enter before you can view your account (see above ‘registration’ section). The code email should arrive within 5 minutes.

Dashboard

The main page of The Portal is the ‘Dashboard.’

On logging in, click on the Early Years Tab at the top of the page and select ‘Dashboard’ from the drop down menu. From here you can see a top level overview of the information on the Live Register as well as any alerts; upcoming deadlines and if there are any messages waiting for you.

At the bottom of the page there is an ‘Online Eligibility Checks’ section where you can quickly perform the following checks, without having to add a child to your live register.

Age Group Check	Add in a child’s date of birth to see what funding they can access.
2 Year Old Funding	An ad-hoc check for the 2 year old reference number. Enables you to quickly check a reference number without adding the child to the register.
Working Parent Entitlement Check	An ad-hoc check for eligibility codes to show when the code is valid from. This can be used for new starters that cannot yet be added to the live register.



Live Register and Claiming

Funding is claimed on a termly basis by logging into The Education Portal and submitting a 'headcount form.' The headcount is generated by the information you add into The Portal and submitting it is the final step of the process, before this you will have; checked 2 year old reference numbers and Working Parent Entitlement eligibility codes; added children to the live register; checked Early Years Pupil Premium eligibility; uploaded DLA awards letters and set up all your information in preparation for making your funding claim.

There are guides to each step of the process and they are best viewed in this order:

- Begin by reading the [Funding Process Overview](#) and the [provider timeline](#), which details important dates in the term.
- Take a look at the [Provider Information Page](#) which answers some frequently asked questions
- Read the guide to [Working Parent Entitlement codes](#), this helps you to understand codes and how to check they are valid
- View the guide to using the [live register](#) which will help you to add children to your register with the correct hours, including funded 2 year olds.
- Read the guide to [checking eligibility for Early Years Pupil Premium and Disability Access Funding](#) to ensure you maximise income for your setting
- Watch / read the guide to [submitting the headcount form](#).

Help & Support

All Education Portal user guides are available on our [website](#) .

If you have any queries or would like to arrange some training, please contact The Early Education Team by email so that the correct person can be assigned to support you:
early.education@trafford.gov.uk