BEACON HELP · GUIDE

Templates

The inspection template and the staff question bank



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FOR
Area support managers and leads

ONLINE
help.beacon.earlytree.co.uk

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Screenshots show a fictional nursery group and people.

Contents

Templates: the inspection template and the staff question bank. These steps match Beacon 2026.11; for another version, see help.beacon.earlytree.co.uk. Beacon runs at your organisation's own address.

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Reading the screenshots. The orange numbers 1 on a picture match the numbers in the step text, and an orange box marks the part of the screen a step is about. Every guide is also online, with search, at help.beacon.earlytree.co.uk.

TEMPLATES

About templates and the question bank

Two lists shape every inspection:

- The **inspection template** is the checklist library: every item an inspector checks, grouped into categories such as **Safeguarding**, **EYFS**, **Health & Safety** and **Kitchen & Food Safety**. Each item says how often it's checked, which kind of area it applies to, how much it counts towards the score, and whether it's a pass or fail or a temperature reading.
- The **staff question bank** holds the questions an inspector can ask staff during a visit, with guidance on what a good answer sounds like.

Changing an item never changes inspections already started: each inspection keeps the version of every item it was started with. Edits create a new version, and the old ones are kept as history.

Who can do what

	Area support manager	Area support lead	Others
See **Templates** and **Question Bank** in the menu	Yes	Yes	No
Add, edit and retire template items	Yes	Yes	No (view only)
Download and import the template as a spreadsheet	Yes	No	No
Manage the question bank	Yes	No (the page sends you back to the dashboard)	No

Guides

- The inspection template
- Editing and retiring an item
- Importing and exporting the template
- The staff question bank

TEMPLATES

Templates: the inspection template

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead	**Area Support** › **Templates**	5 minutes per item	Area support manager or lead

Purpose

Keep the inspection checklist right for your nurseries: add items when expectations change, so every inspection from then on checks them.

How an item is used

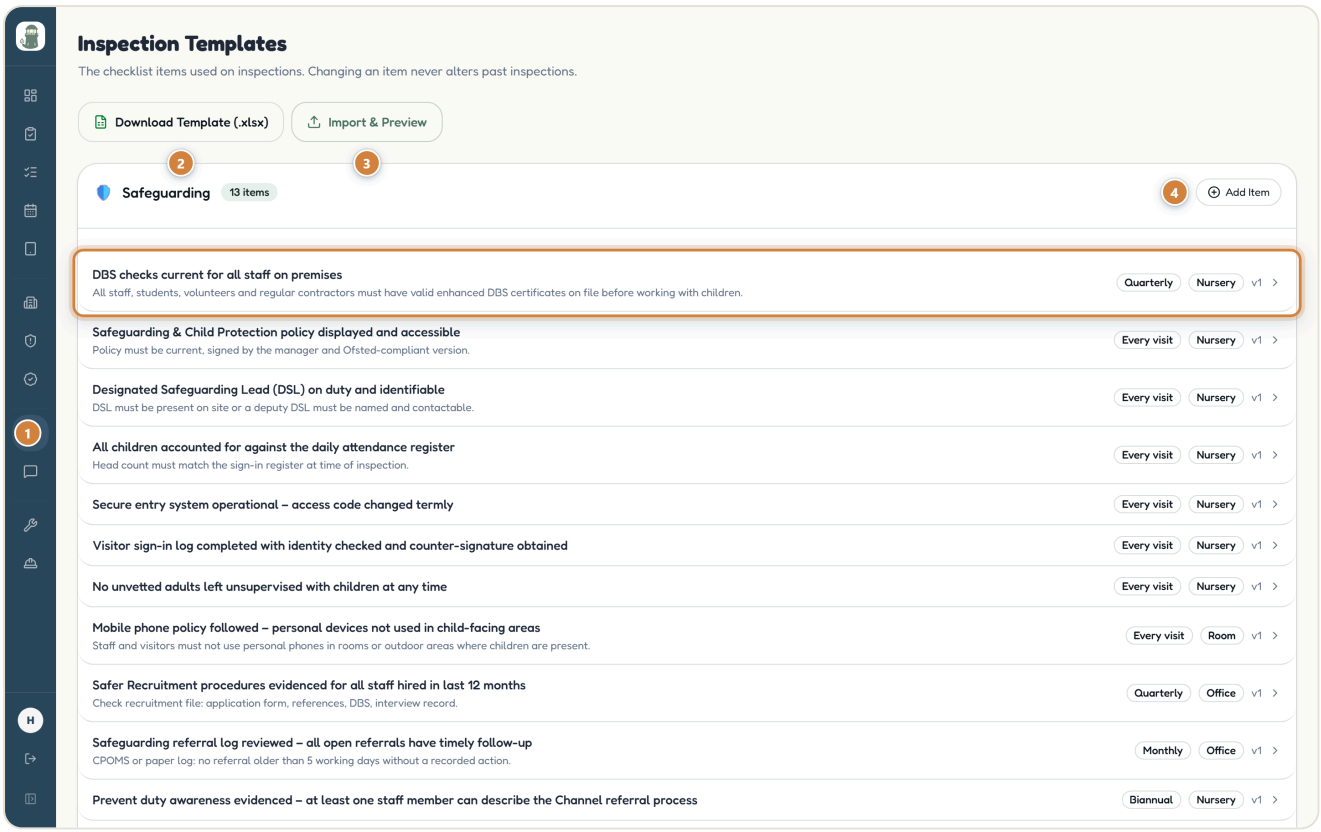
- **Frequency** decides which visits check it. A **Monthly** visit checks items marked **Every visit** and **Monthly**; a **Quarterly** visit adds **Quarterly** items; a **Biannual** visit adds **Biannual** items; an **Annual** or **Ad-hoc** visit checks everything.
- **Applies To** decides where it's checked: **Nursery** and **Group** items once for the nursery as a whole, **Room** items in every children's room, and **Kitchen**, **Office** and **Outdoor** items in each area of that kind. See Areas and rooms.
- **Weight** is how much the item counts. The score is the weighted share of items that passed: 80% or more is a **Pass**, 50% to 79% a **Fail**, and under 50% **Immediate Action Required**. Give the most important items (such as safeguarding and ratios) a weight of 2.
- **Item Type** is **Standard (Pass/Fail)** or **Temperature Reading**. A temperature item records the reading, and a reading outside the **Min** and **Max** fails automatically.
- **Ofsted EY Areas** tags the Ofsted areas the item gives evidence for. They're used to suggest grades during review.

Before you start

- You're an area support manager or lead.
- Agree the wording with your colleagues: everyone inspecting will see it.

Look through the template

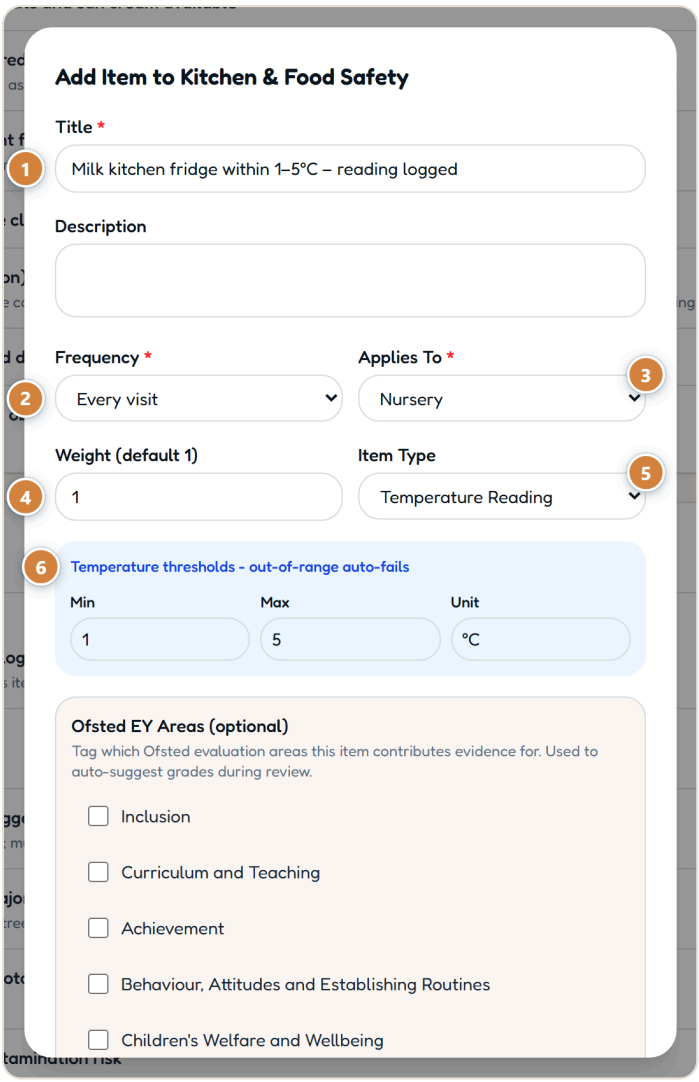
1. In the menu, under **Area Support**, select **Templates** 1.
2. Items are grouped by category, with how many there are. Each item shows its title, description, frequency, where it applies and its version (for example **v2**).
3. Select an item to see its details and history. See Editing and retiring an item.



The inspection template, grouped by category.

Add an item

1. Select **Add Item** 4 on the category the item belongs to.
2. Type the **Title** 1, written as what good looks like (for example "Fridge temperature within safe range (1–5°C) – reading logged"). Add a **Description** to tell the inspector what to look for.
3. Choose the **Frequency** 2 and **Applies To** 3: **Group**, **Nursery**, **Room**, **Kitchen**, **Office** or **Outdoor**.
4. Set the **Weight** 4 (1 unless it matters more).
5. Choose the **Item Type** 5. For **Temperature Reading**, enter the **Min** and **Max** 6 and the **Unit** (°C).
6. Tick any **Ofsted EY Areas** it gives evidence for.
7. Select **Create Item**.



Adding a temperature item.

What you should see

> The item appears in its category as **v1**. It's on every inspection started from now on that includes its frequency and has an area it applies to. Inspections already started don't change.

Common problems

I can't see Templates in the menu, or Add Item.

Only area support managers and leads (and Beacon administrators) manage the template. Anyone else who opens it sees it as view only.

A new item isn't on an inspection.

Check the visit type includes its frequency, and the nursery has an area it applies to: a **Nursery** item needs the nursery's General (Nursery-wide) area. Inspections started before you added it don't change.

Related guides

- About templates and the question bank
- Editing and retiring an item
- Importing and exporting the template
- Inspections

TEMPLATES

Templates: editing and retiring an item

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager Area support lead	**Area Support** › **Templates** › **an item**	A few minutes	Area support manager or lead

Purpose

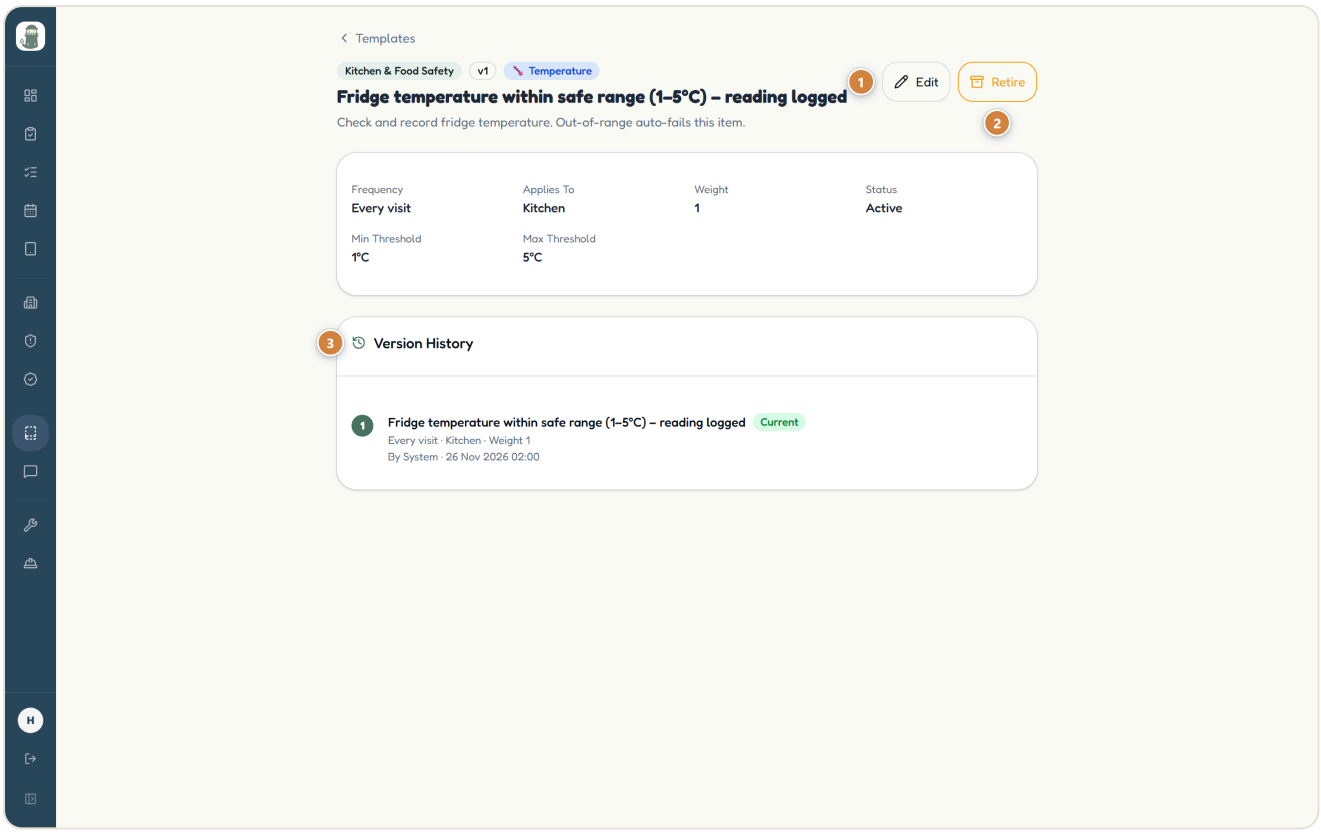
Improve a checklist item's wording, weight or thresholds, or stop checking it, without changing any inspection that has already used it.

Before you start

- You're an area support manager or lead.

Edit an item

1. In the menu, under **Area Support**, select **Templates**, then select the item.
2. The page shows its category, version, type, frequency, where it applies, weight, status and any thresholds or Ofsted areas.
3. Select **Edit** 1, change what you need (the same fields as when adding an item), and save.



A template item, with its version history.

What you should see

> The item's version goes up by one (for example **v1** to **v2**). **Version History** 3 lists every version, newest first, with who made it, when, and what changed from the version before. Inspections already started keep the version they started with.

Retire an item

1. Open the item and select **Retire** 2.
2. Beacon asks **Retire this item?** Select **Retire item** to confirm.

A retired item isn't on new inspections. Answers already given to it are kept. Retired items drop out of the template list; to bring one back, create a new item, or set it active again in the spreadsheet (see Importing and exporting the template).

Common problems

I can't find a retired item.
Retired items aren't listed. Download the template spreadsheet: retired items are there with Active set to no.

Related guides

- The inspection template
- Importing and exporting the template
- About templates

TEMPLATES

Templates: importing and exporting the template

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager	**Area Support** › **Templates** › **Download Template (.xlsx)**	15 minutes or more	Area support manager

Purpose

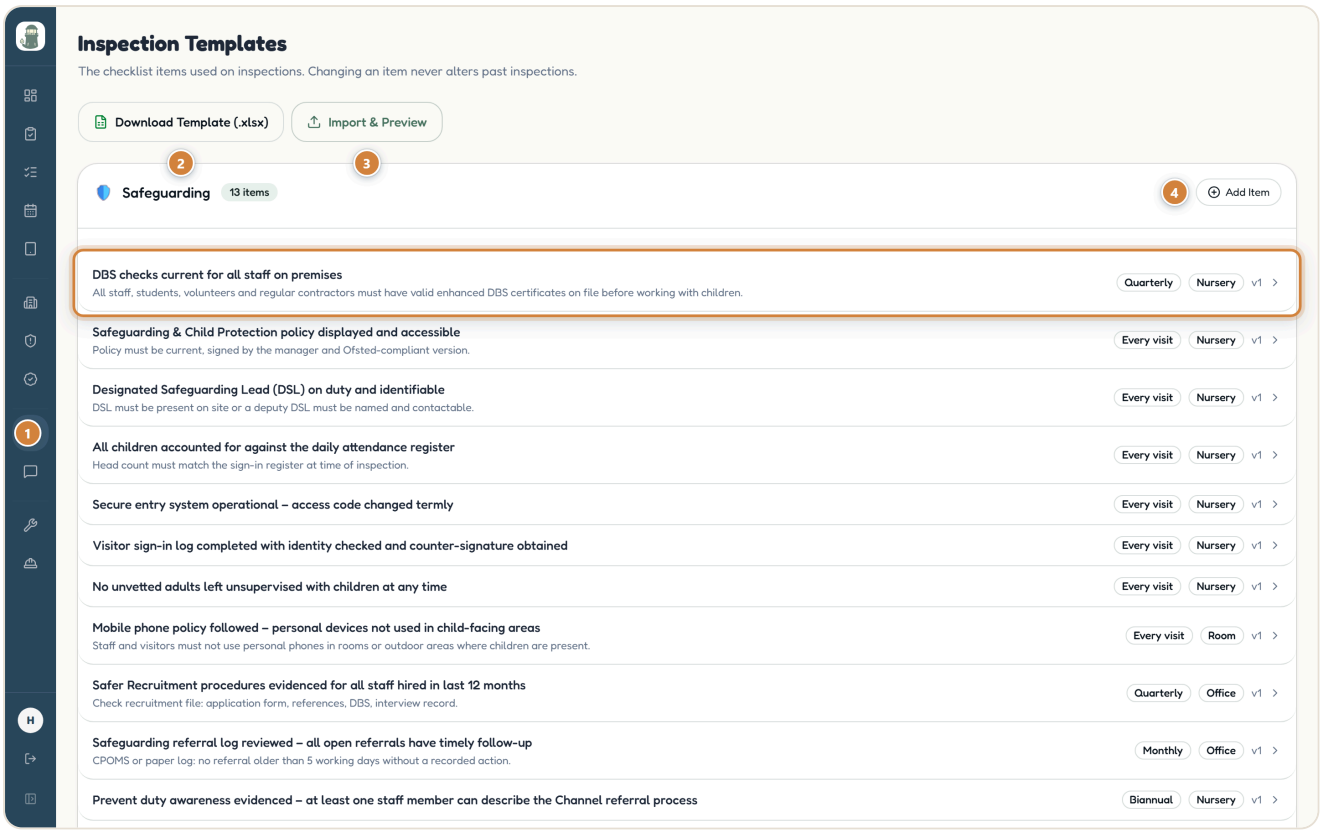
Review or change many checklist items at once, for example after a policy review, by editing the template in a spreadsheet. You always see a preview of every change before anything is saved.

Before you start

- You're an area support manager.
- You have Microsoft Excel or another program that opens .xlsx files.

Download the template

1. In the menu, under **Area Support**, select **Templates**.
2. Select **Download Template (.xlsx)** 2. **Template file downloaded** appears.
3. Open the file. The first tab, **Instructions**, explains every column. Each category has its own tab.



Download and import are at the top of the Templates page.

Change the spreadsheet

- Edit an item's **Name**, **Description**, **Weight**, **Type**, **Frequency**, **Applies To**, Ofsted area columns (**yes** or **no**) or **Active**, and set its **Status** to **updated**. Each updated item gets a new version.
- To add an item, fill in a blank row on the right category's tab, leave **ID** empty and set **Status** to **new**.
- Leave **Status** as **existing** for anything you haven't changed. Never edit the **ID** column.
- **Applies To** can be Group, Nursery, Room, Kitchen, Office or Outdoor. **Type** is Standard or TemperatureReading.
- Set **Active** to **no** to retire an item, or **yes** to bring a retired one back.

Import your changes

1. Select **Import & Preview** 3 and choose your saved file.
2. Beacon shows an **Import Preview**: each item marked **New item** or **Updated**, with the old and new value of each changed field highlighted. Unchanged items are hidden; you can show them.
3. Check every change. If something's wrong, fix the spreadsheet and import it again.
4. Select **Apply** (it says how many changes, for example **Apply 3 changes**).

What you should see

> **Done — 1 item added, 2 updated** (or similar) appears, and the template shows the new and updated items with their new version numbers.

Common problems

"Please upload an Excel file (.xlsx or .xls)".
Save the file as an Excel workbook, not CSV, and try again.

"No changes detected — all items are marked as existing."
Set **Status** to **updated** or **new** on the rows you changed.

Row "...": invalid Applies To (or Frequency, or Type).
Use one of the values from the drop-down in that column. Nothing is saved until every row is valid.

A new item didn't appear.
Its tab must be named exactly as an existing category. Don't rename the tabs.

I can't see Download or Import.
They're there for area support leads too, but only area support managers can use them.

Related guides

- The inspection template
- Editing and retiring an item

TEMPLATES

Templates: the staff question bank

WHO IT'S FOR	WHERE TO FIND IT	TIME	YOU NEED
Area support manager	**Area Support** › **Question Bank**	A few minutes per question	Area support manager

Purpose

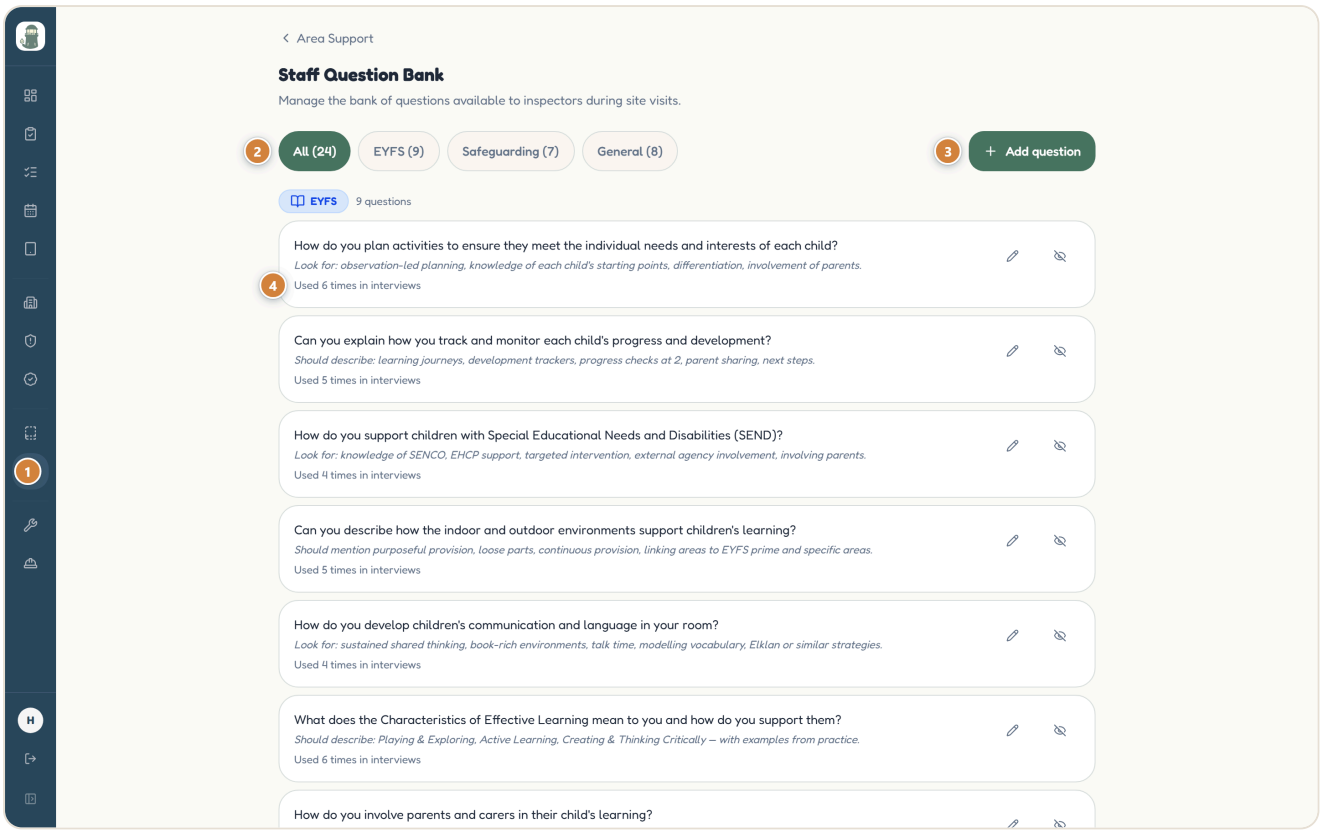
During a visit, inspectors talk to staff to check their understanding of safeguarding, the EYFS and everyday practice. The question bank is the list they choose from, each with guidance on what a good answer includes, so every inspector asks consistent, well-judged questions.

Before you start

- You're an area support manager. (Area support leads see **Question Bank** in the menu but are sent back to the dashboard.)

Look through the question bank

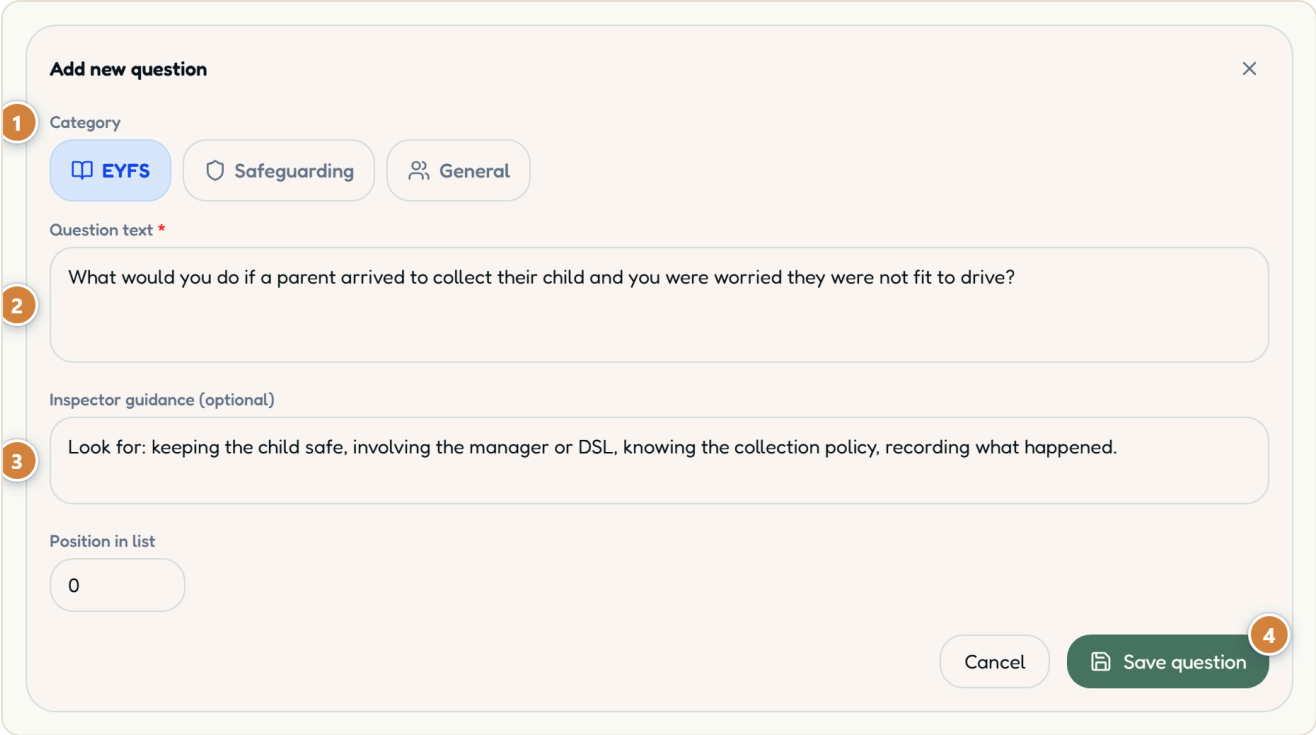
1. In the menu, under **Area Support**, select **Question Bank** 1.
2. Use the tabs 2 to show **All**, or only **EYFS**, **Safeguarding** or **General** questions.
3. Each question shows its guidance and how many times it has been used in interviews 4.



The staff question bank.

Add a question

1. Select **Add question** 3.
2. Choose the **Category** 1: **EYFS**, **Safeguarding** or **General**.
3. Type the **Question text** 2, as you'd ask it.
4. Under **Inspector guidance (optional)** 3, say what to look for in the answer.
5. Set the **Position in list** (lower numbers come first in their category).
6. Select **Save question** 4.



Adding a question.

Edit or switch off a question

- Select the pencil on a question to change it, then **Save**.
- Select the eye on a question (**Hide question**) to switch it off, so it's no longer offered to inspectors, or **Show question** to switch it back on. Questions that have been used are kept with the interviews they were asked in, so switch a question off rather than rewriting it into a different question.

What you should see

> **Question added**, **Question updated**, or **Question activated** / **Question deactivated** appears, and the list updates.

Common problems

"Question text required".
Type the question before saving.

I'm an area support lead and the page sends me to the dashboard.
Only area support managers can manage the question bank in this release.

Related guides

- About templates and the question bank

- Inspections