Submitting an Actuals Claim Via the Synergy FIS Provider Portal

Guidance for Early Years Providers

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Submitting A Claim

How to submit your claim and error messages

Entitlements for Funded Hours

Age Range	FEE Entitlement	Maximum Weekly Hours	Annual Hours	Maximum Entitlement
9 Months +	Working Parent Entitlement	30 term time	1140	A maximum of 1140 for eligible 9 months +
2 Year Olds	Early Learning for 2YOs (EL2)	15 term time	570	A maximum of 570 for eligible 2 year olds*
2 Year Olds	Working Parent Entitlement	30 term time*	1140	A maximum of 1140 for eligible 2 year olds*
3&4 Year Olds	Universal Entitlement	15 term time	570	A maximum of 1140 for eligible 3&4 year olds
3&4 Year Olds	Working Parent Entitlement	15 term time	570	

⚠ Children become eligible for their respective entitlement from the start of term following their qualifying birthday.

ⓘ *If eligible for both EL2 Funding and the Working Parent Entitlement, the funding will be split between the entitlements to a maximum of 30 hours per week and 1140 hours per year. (Refer to Eligibility Scenarios)

Logging into the Synergy Portal

The Synergy FIS Provider Portal is your gateway to managing Free Entitlements funding claims.

Accessing the system properly is the first step to successful submission.

Access the Login Page

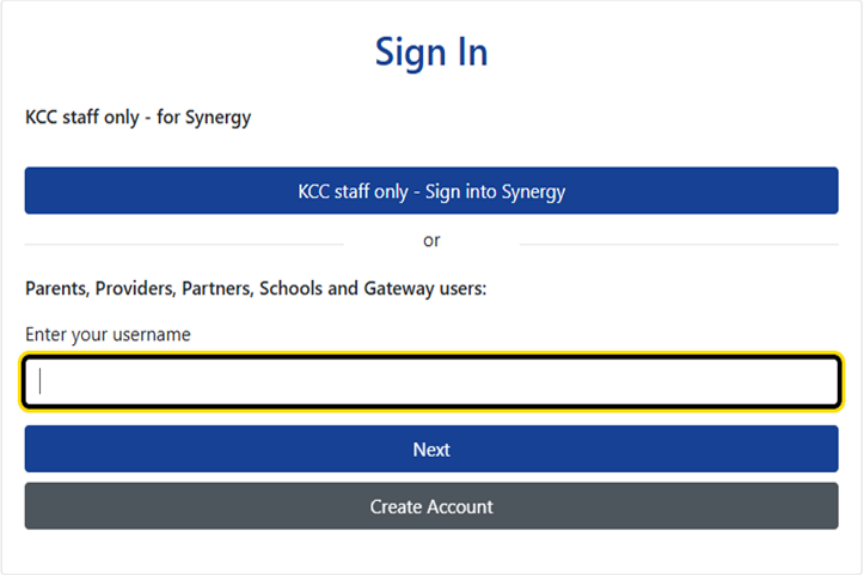
Use the link: Sign In - Synergy

Enter Credentials

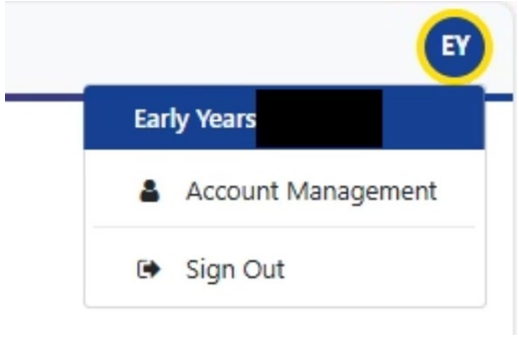
Sign in using your 6-digit URN as your username, click next and then enter your password

Accept Security Notice

Read the security notice carefully and click 'Accept' to proceed



Portal Access: Important Information



Upon successful login, you'll see the Home Screen with the 'EY' button in the top right corner, offering two options:

- **Account Management** - Update or change your password
- **Sign out** - Securely log out of the portal

Important notifications and messages may occasionally appear on the Home screen. Always check for these updates as they may contain vital information about funding deadlines or system changes.

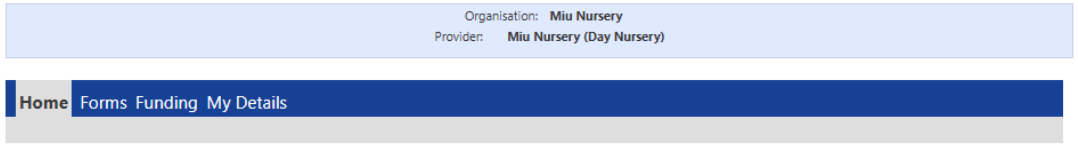
Password Management

- If you've forgotten your password, select 'Forgot Password' for a one-time passcode
- For locked accounts, contact the Early Years Management Information team on 03000 421612 or miearlyyears@kent.gov.uk
- Passwords must be at least 7 characters long
- Must include at least one capital letter and one number
- Cannot be the same as your username
- Cannot reuse previous passwords

⚠ Remember to change your password regularly to maintain security. You can update your password through the 'Account Management' option after clicking the 'EY' button in the top right corner. Passwords need to be changed every 42 days.

Navigating the Home Screen

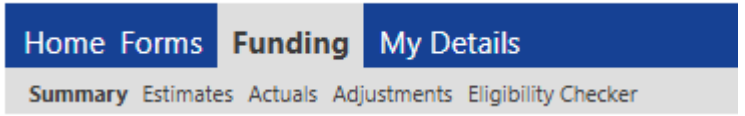
Main Navigation Tabs



The portal has four main tabs:

- **Home** - Main dashboard
- **Forms** - Access to required documentation
- **Funding** - Where you'll submit actuals claim data
- **My Details** - Where you'll submit census data

Within the **Funding** tab, you'll find five sub-tabs:



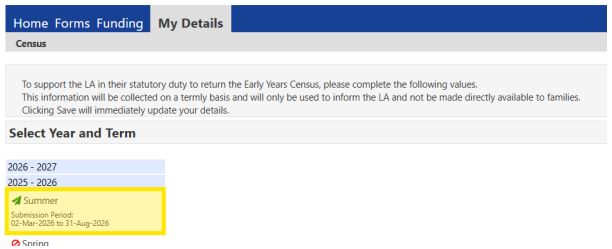
- **Summary** - Breakdown of funding
- **Estimates** - Submission within the designated timeframe
- **Actuals** - Submission during the actuals claim period
- **Adjustments** - Submission after actuals period has ended
- **Eligibility Checker** – Tool to complete on screen checks for the working parent entitlement for continuing children

Termly Census

The EY Census information must be submitted before any actuals claims can be submitted. To do this, please complete and submit the “My Details” tab in the Synergy portal. You will then be able to submit each actuals claim in the normal way.

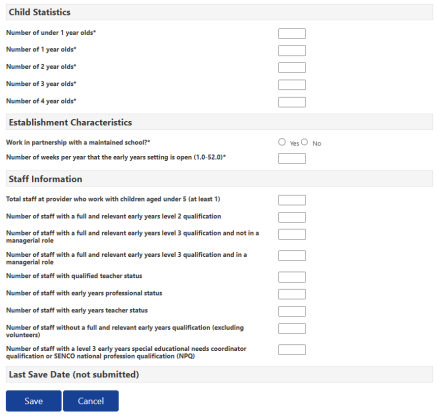
Select the Relevant Term

Choose the correct term from the dropdown menu to ensure your claim is processed for the appropriate period



Complete Census

Complete the three sections of the census and click ‘Save’ when you are finished.



Green Banner

A green banner will confirm successful submission. If it doesn’t appear, check ‘My Details’ — a date will show next to ‘Last Save Date’ if the form was submitted.



Submit Funding Claims

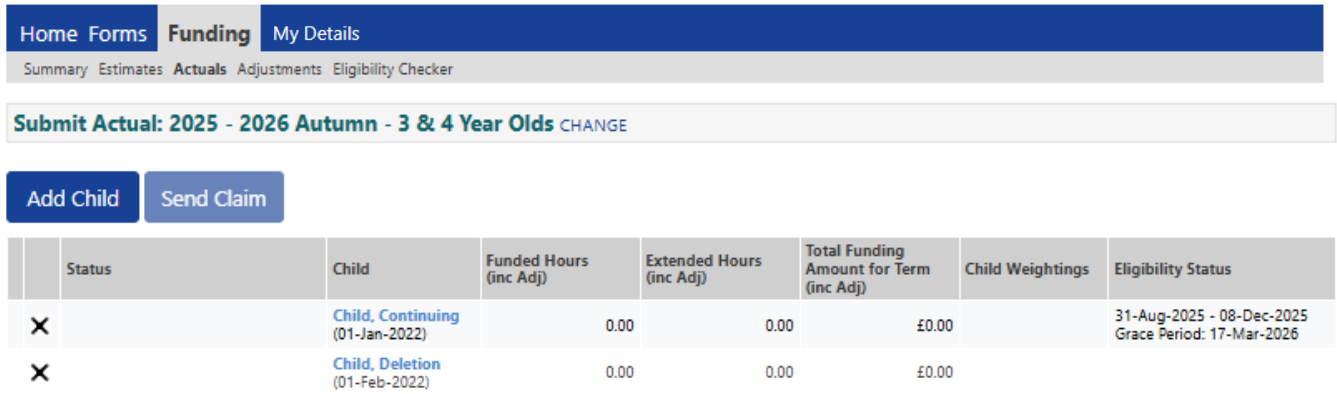
Return to the ‘Funding’ Tab and ensure each funding type is submitted

Managing Existing Records

Before adding any new children to the system, you must first process your continuing claims list:

Review Existing Children

The system displays children previously claimed who still fall within the eligible date of birth range for the new term.



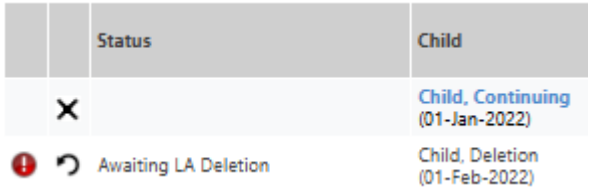
Remove Departing Children

For children who have left your setting or are no longer claiming funding, click the black 'X' icon next to their name.



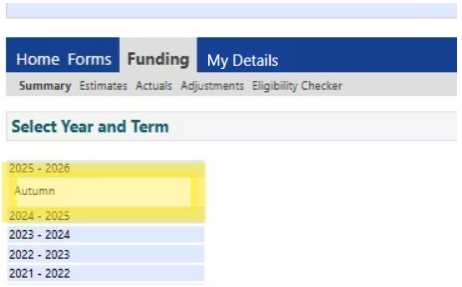
Confirm Deletions

When prompted, click '**Yes**' to confirm. A backward arrow and 'Awaiting LA Deletion' status will appear next to the child's name.



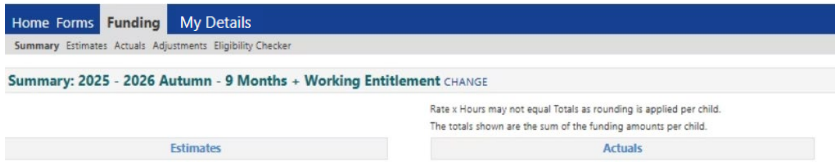
Select the Relevant Term

Choose the correct term from the dropdown menu to ensure your claim is processed for the appropriate period



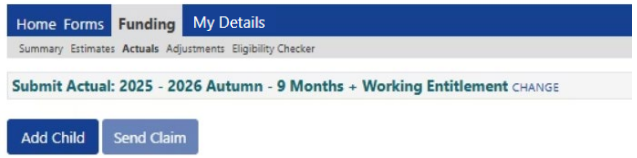
Select the Appropriate Funding

Choose the correct funding type for your claim



Access the Actuals Tab

Click on the 'Actuals' tab to begin entering your actual claims information



2-Year-old Working Entitlement and Early Learning for 2 Year Olds (EL2 previously known as FF2) will be under All 2 Year Olds

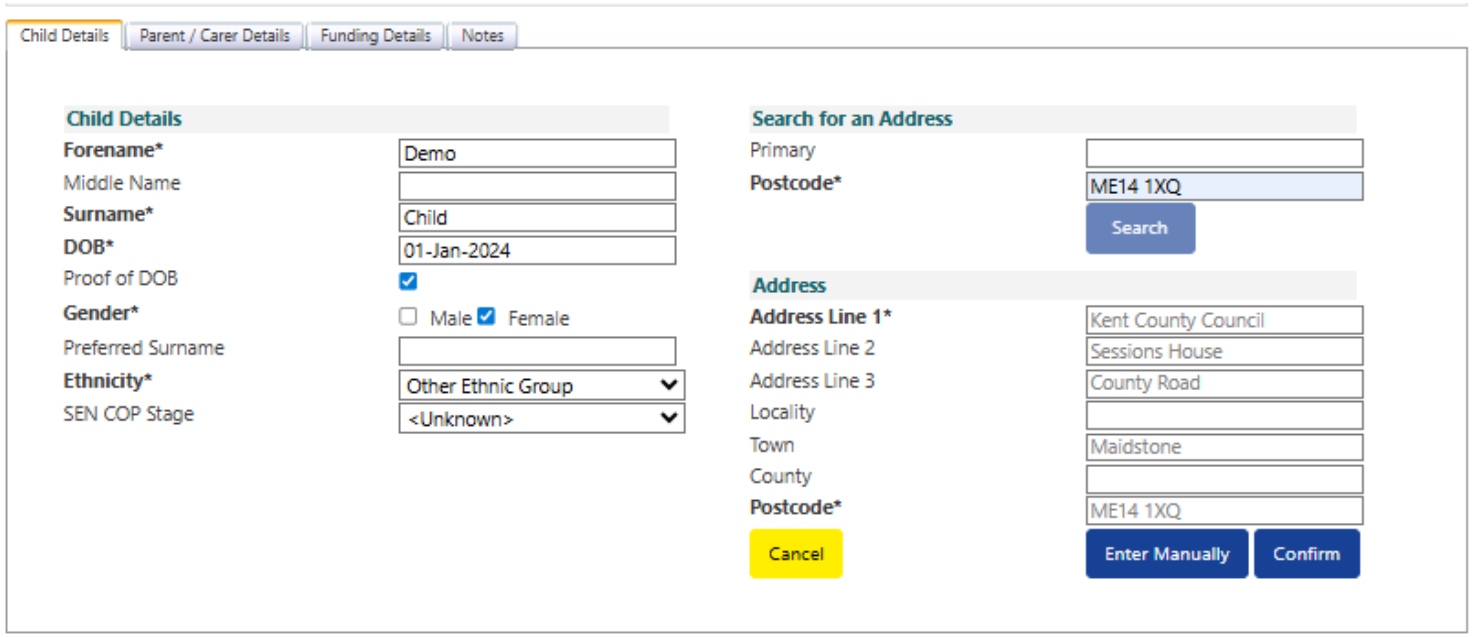
TIP: Always double-check that you have selected the correct term and funding type. If you need to make changes, click 'CHANGE' to return to the Summary tab.

Editing a Child's Record

Clicking on the child's name will open their record, where you can amend the following information:

Child Details Tab

- Verify all information is accurate
- Complete all mandatory fields (marked with *)
- If you are supporting a child with additional needs but they do not have an Education Health and Care Plan (EHCP) in place, please record the SEN COP Stage as 'SEN Support' when submitting your claim. Otherwise leave as <Unknown>.



⚠ **Name Change Protocol:** Do NOT update names for deed poll or adoption changes, contact Early Years Management Information Team. Overwriting names may result in missed funding

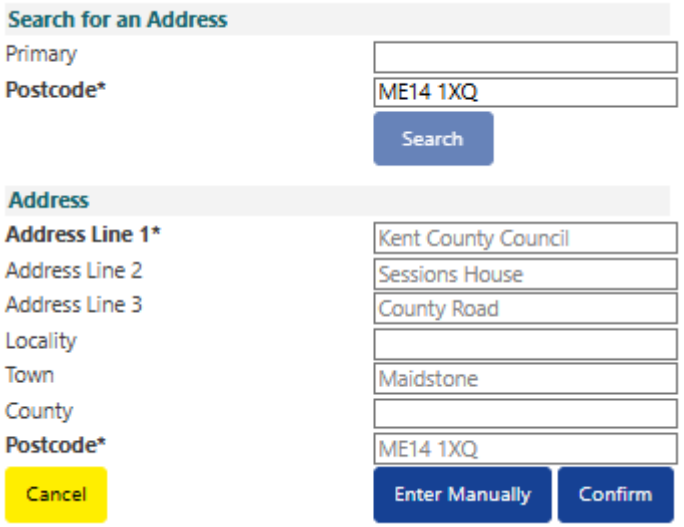
Updating a Child's Address

- If a child's address has changed, click the **blue 'Update Address'** button.
- In the **'Primary'** field, enter the **house name or number**.
- Then, enter the **postcode**.
- Click **'Search'** to locate and update the address.



Confirming or Manually Entering an Address

- If the displayed address is correct, click **'Confirm'** to proceed.
- If the correct address does not appear but you are confident the address and postcode are accurate, click **'Enter Manually'**.
- After manually entering all lines of the address, click **'Confirm'** to save the changes.



Managing Parent/Carer Details

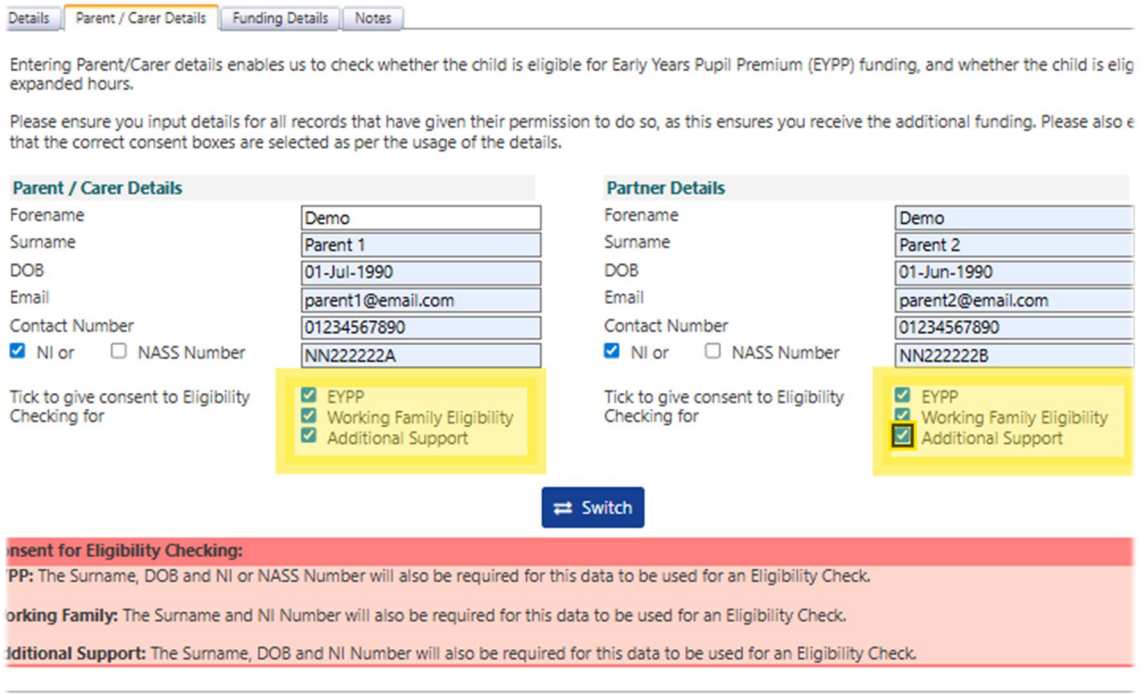
Navigate to the Parent/Carer Details tab to verify previously entered information.

Working Parent Entitlement

This tab is **mandatory** for children eligible for Working Parent Entitlement.

Ensure that the Parental Declaration form has been completed and signed by the parent.

Kelsi website



Required Information

- Parent's full name
- NI or NASS
- Date of birth

Tick **all** consent boxes for eligibility checks:

- EYPP
- Working Family Eligibility
- Additional Support (EL2)*

*Please note: the tick box is displayed only within the 'All 2-Year-Old Funding' section

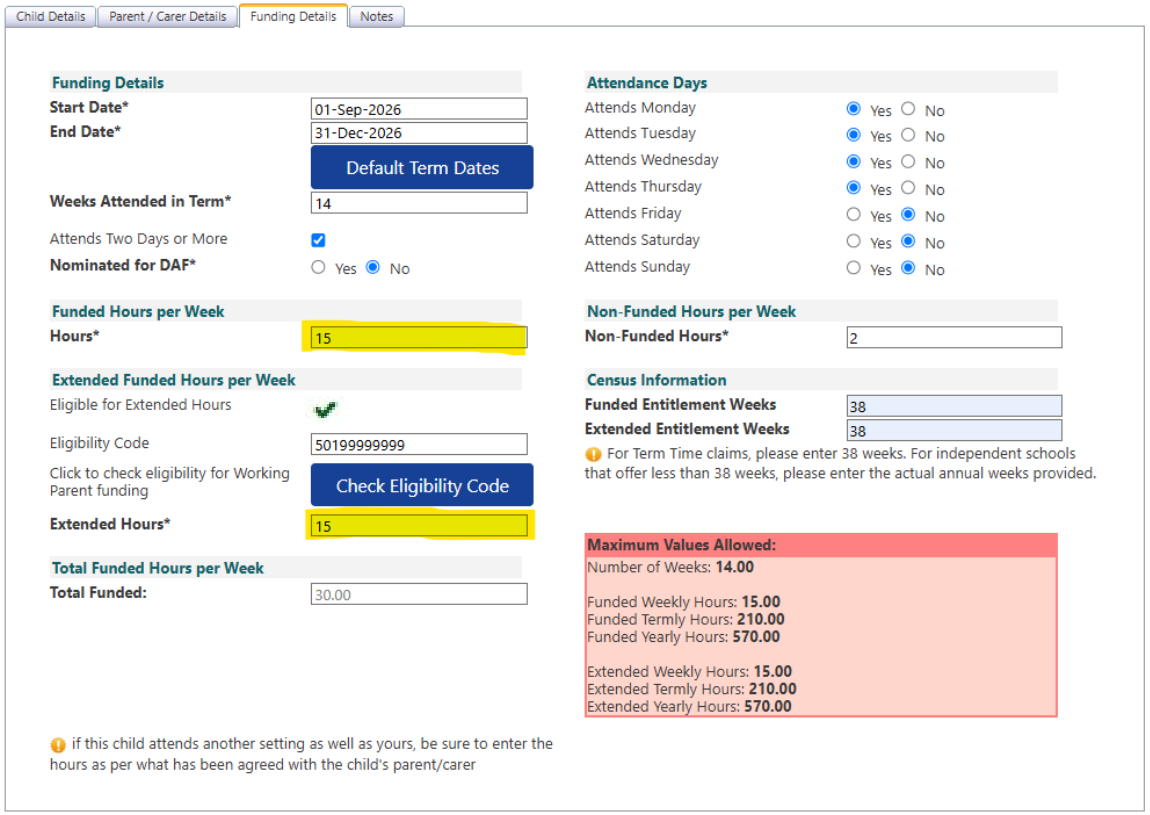
Continuing Children - Updating Funded Hours

For each continuing child, you must manually enter:

- Updated funded hours and attendance days
- Number of weeks claimed

This information must be entered in the 'Funding Details' tab for each child's record.

Also, check that the ‘Attends 2 days or more’ box is ticked if the child is claiming more than 10 hours of funding per week.



Important reminder: Synergy does NOT automatically carry forward hours or weeks from previous terms

TIP: If any record is not properly updated, the "Send Claim" button will remain greyed out, preventing submission of your entire claim.

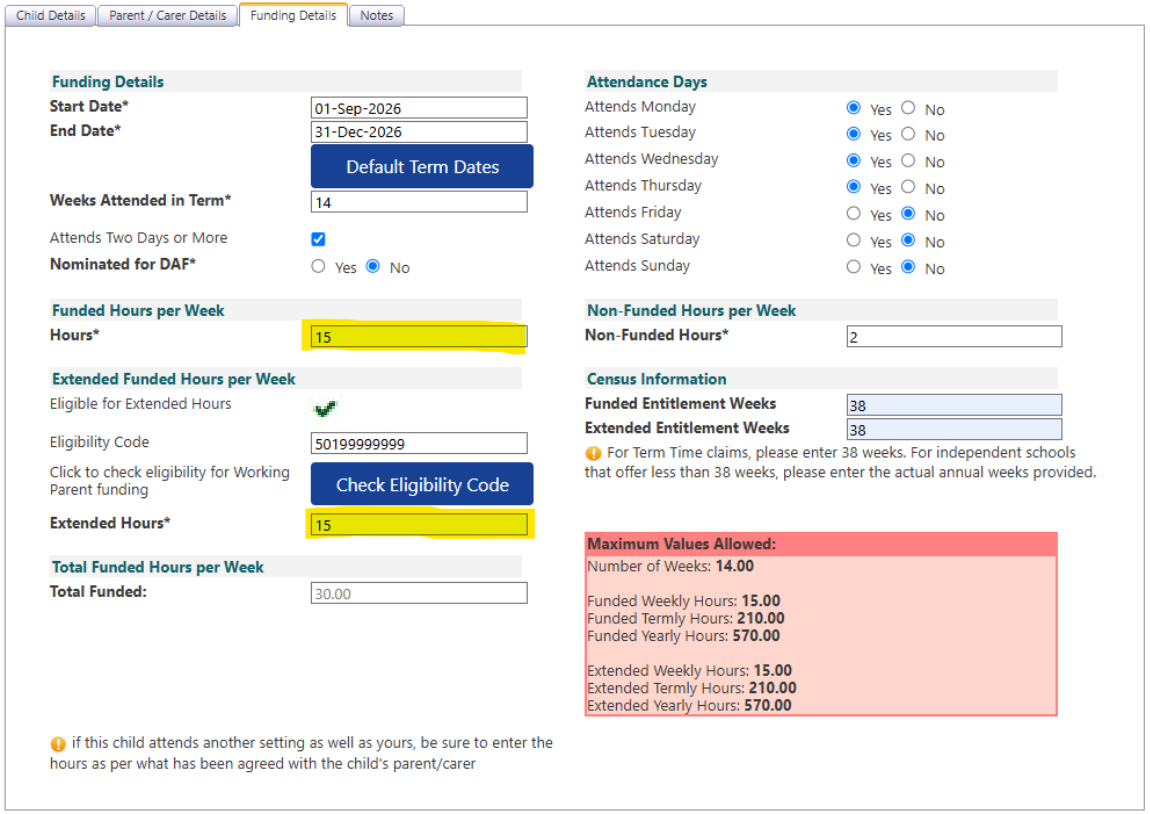
Funding Details Tab

Key Information

- Mandatory fields are marked with an asterisk (*), including non-funded hours
- A red box will indicate the maximum weekly and termly hours that can be claimed
- The start date should reflect when the child began attending that term

The maximum weeks that can be claimed for each term are:

Autumn:	14
Spring:	11
Summer:	13



Please note: the 'Funding Details' tab differs depending on the type of funding that is being claimed.
3&4 year olds can all claim universal hours (funded hours in Synergy), and eligible children can claim Working Parent Entitlement hours which are listed as 'Extended Hours' in Synergy.
Early Learning for 2YOs (EL2) is entered in the 'Funded Hours' box.
Working Parent Entitlement funding for 2 Year Olds or 9 month+ children is entered in the 'Expanded Hours' box.

Early Years Pupil Premium (EYPP) – Economic Criteria

Important Process Change

The process for claiming EYPP under the economic criteria has been updated. Please follow these steps for valid claims:



Obtain Parental Consent

Ensure the Parental Declaration Form is completed and signed by the parent before entering information.

Kelsi website



Complete Parent Details

Enter parent names, National Insurance number or NASS, and parent dates of birth in the Parent/Carer Details section.



Enable Eligibility Check

Tick the consent box to enable the EYPP eligibility check to be processed.

⚠ Missing or incomplete information will result in EYPP funding not being allocated to eligible children.

Adding a New Child

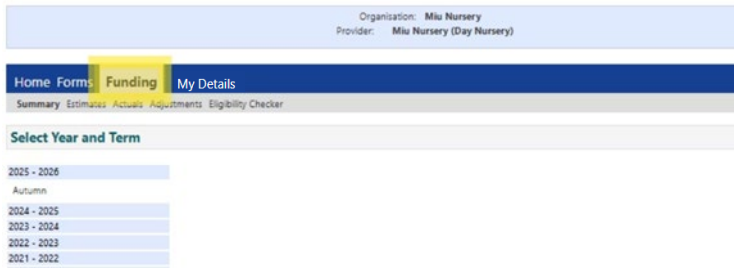
The term's funding is based on census week. To submit a claim for the term, providers must be open and offer funding during the designated census week. Providers must also ensure that children are in attendance for their full hours during the designated census week of the funding period unless they are known either to be ill or on holiday. Evidence of a child being either ill or on holiday, such as an email or text from the parent, must be kept for compliance purposes. If a child does not return to the setting from being ill or on holiday, providers must contact MI so the claim can be reduced before payment is made.

To successfully add a new child, you'll need:

- Child's full legal name (as shown on birth certificate)
- Date of birth
- Home address and postcode
- Parent/carer details
- Eligibility code (if applicable)
- Number of funded hours being claimed
- Completed and signed Parental Declaration

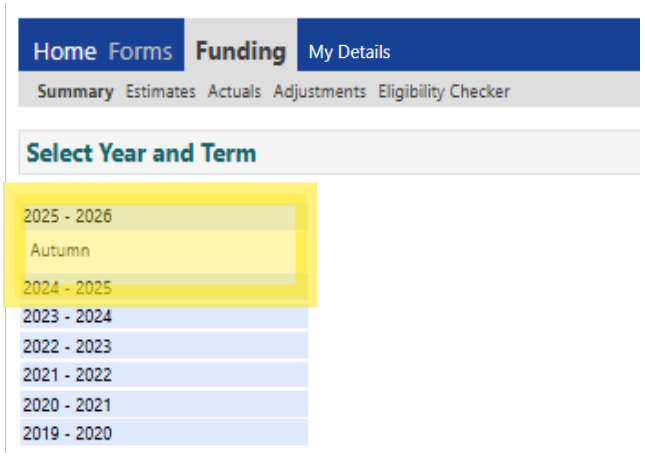
Log In to Portal

Access the Synergy FIS Provider Portal using your credentials. Select the ‘Funding’ tab.



Select Term

Choose the correct term from the dropdown menu



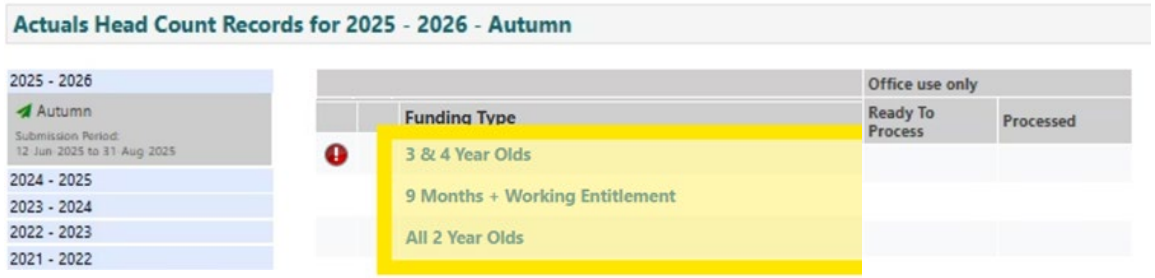
Select Funding

Choose the appropriate funding type for the child



Selecting the Correct Entitlement

When adding a child, it is crucial to select the correct entitlement you wish to claim under. This ensures proper funding allocation and accurate reporting.



3&4 year old Universal & Extended Entitlement

For all 3&4 year olds (universal up to 15 hours) and those eligible for extended hours (up to an additional 15 hours)

9 Months plus Working Parent Entitlement

For eligible children aged 9 months and older whose parents meet the working criteria (up to 30 hours)

All 2 Year Olds

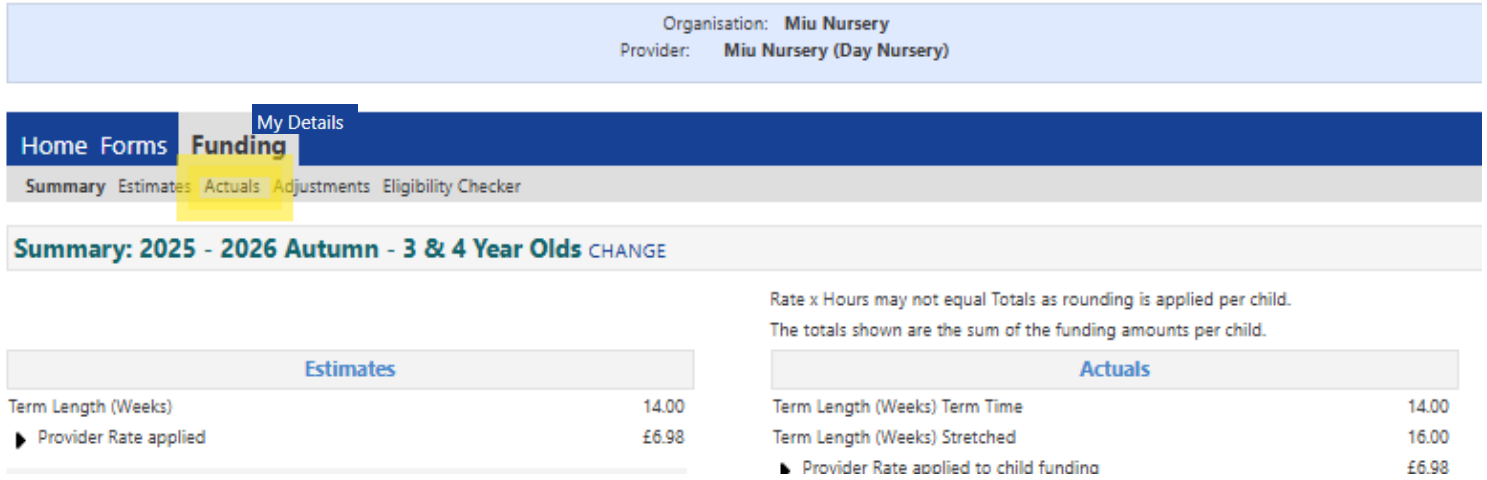
Eligible 2-year-olds whose parents meet the working criteria (up to 30 hours)

Eligible 2-year-olds who qualify based on disadvantage criteria (up to 15 hours).

If eligible for both EL2 Funding and the Working Parent Entitlement, the funding will be split between the entitlements to a maximum of 30 hours per week and 1140 hours per year.

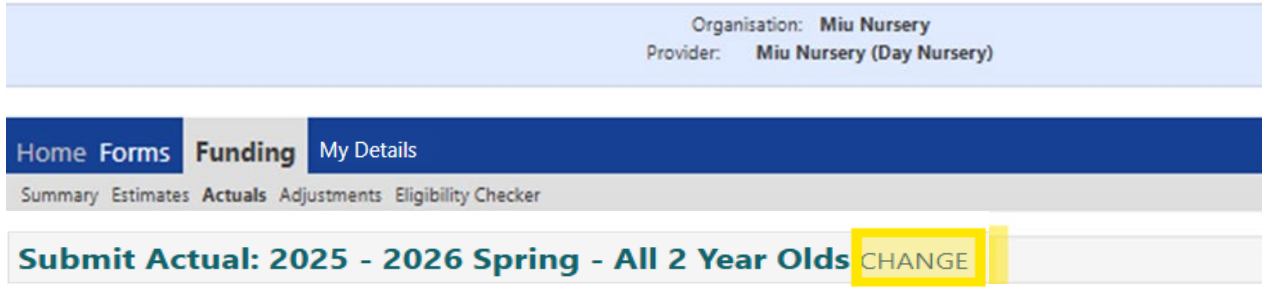
⚠ Remember to verify date of birth ranges as listed on the Kelsi website, available for both Childminders and Settings. This ensures you're claiming for children who are age-eligible for their respective entitlements.

- Select '**Actuals**'



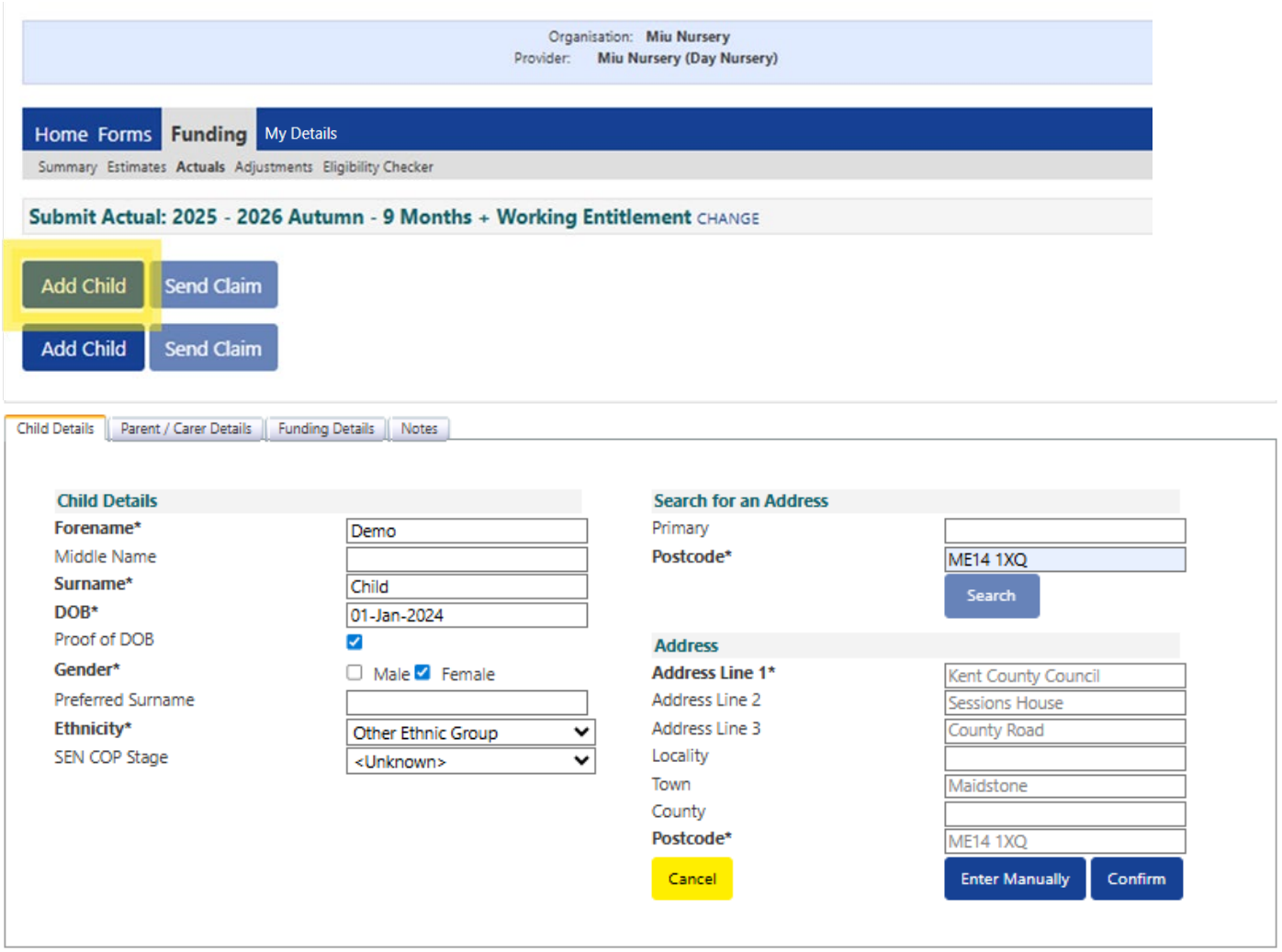
⚠ **Please note:** The actuals tab will differ slightly depending on which entitlement you select

Tip: If you accidentally select the wrong entitlement or term, click 'Change' to go back to the list of funding types and reselect





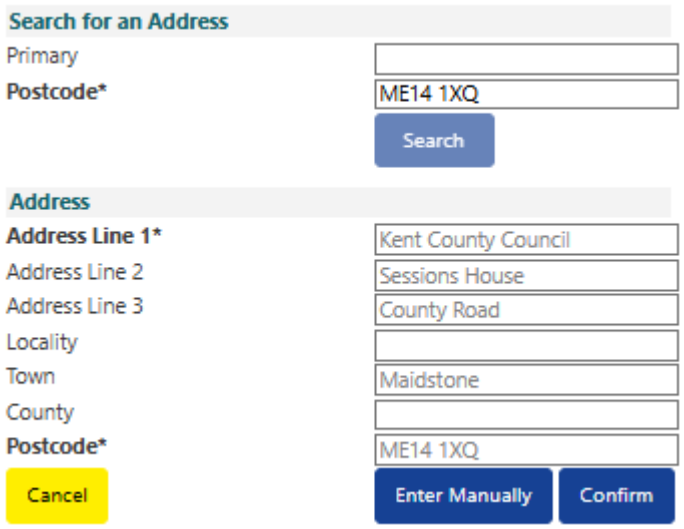
9 month plus Working Parent Entitlement



Select '**Add Child**'

Under the 'Child Details' tab enter:

- Forename
- Surname
- DOB
- Tick proof of DOB (if seen)
- Select the child's gender
- Select child's ethnicity
- If you are supporting a child with additional needs but they do not have an Education Health and Care Plan (EHCP) in place, please record the SEN COP Stage as 'SEN Support' when submitting your claim. Otherwise leave as <Unknown>.
- Enter house name or number
- Enter child's postcode
- Click on the '**Search**' button



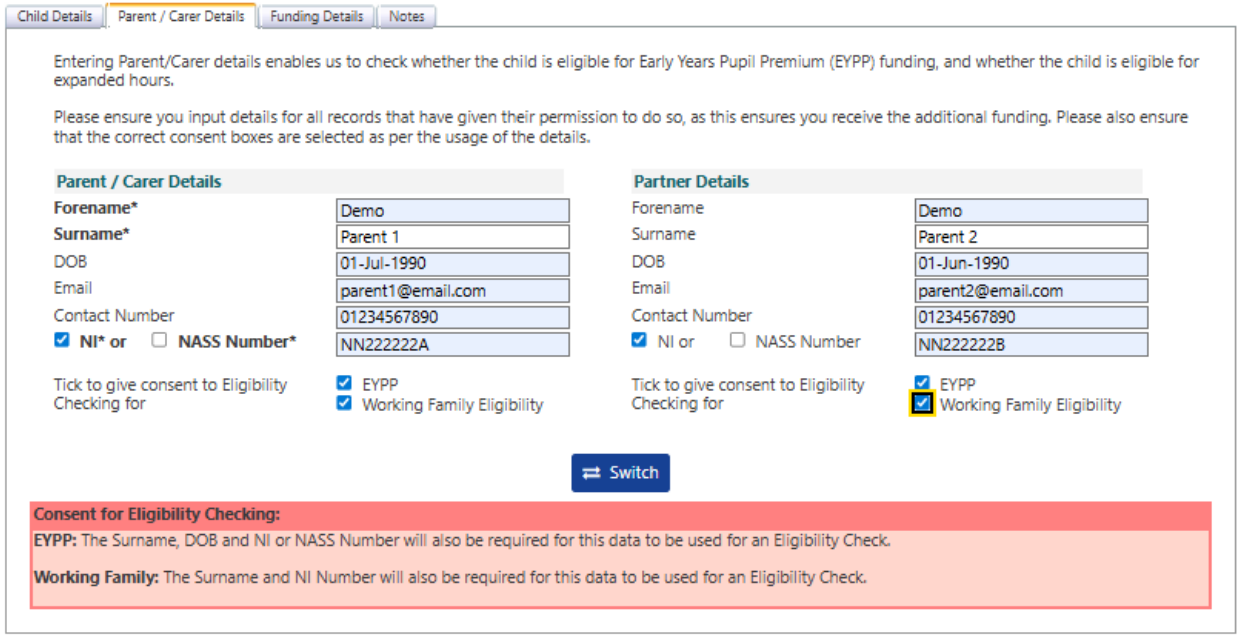
Enter the child address details:

- In the **'Primary'** field, enter the **house name or number**.
- Then, enter the **postcode**.
- Click **'Search'** to locate and update the address.

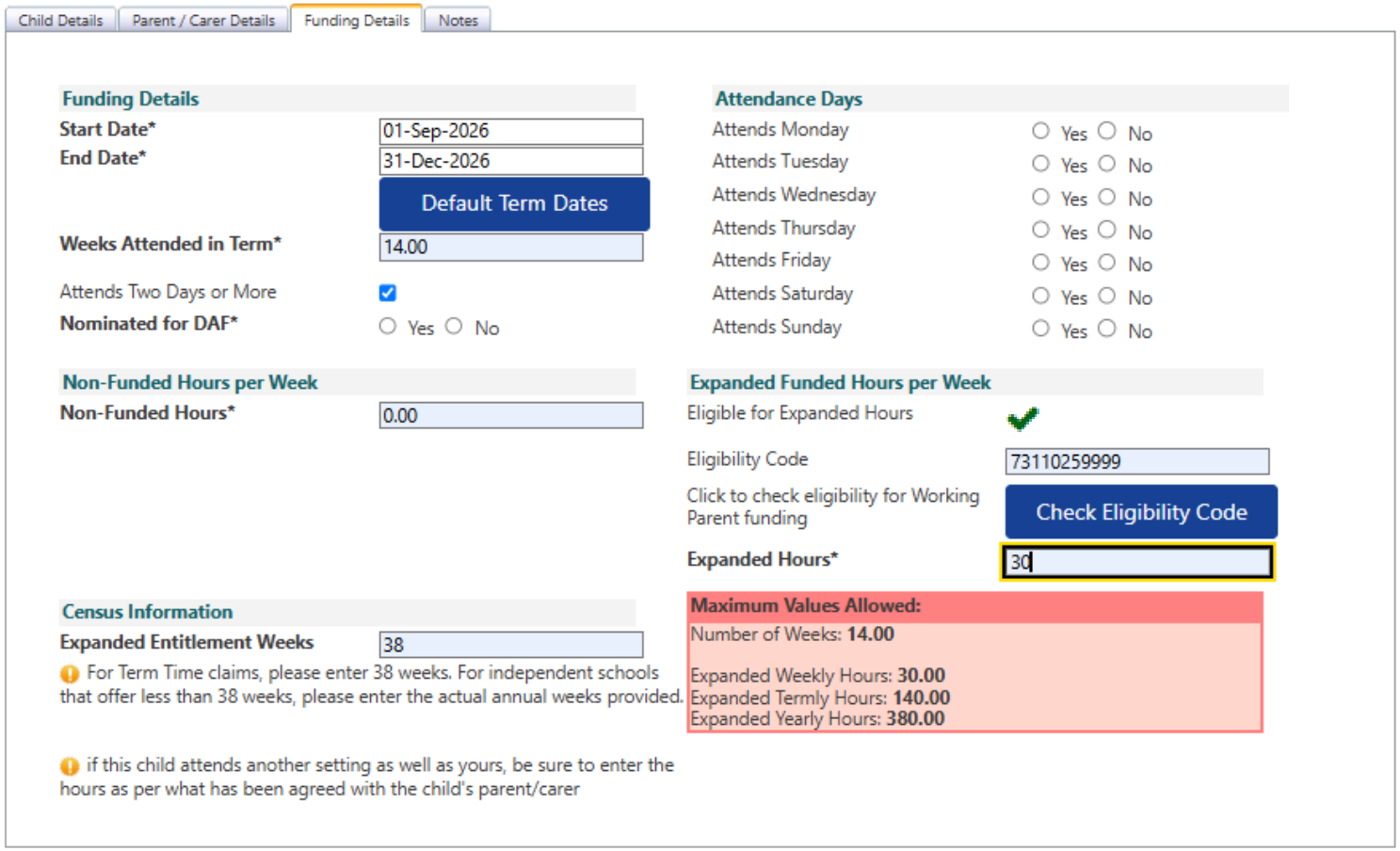
If the populated address is correct, press '**Confirm**', if not press '**Enter Manually**' and input correct address.

Once the Child details have been completed, select the 'Parent/Carer Details' tab.

- Enter the parent / carer details
- National Insurance or NASS number
- Date of birth
- **Tick both consent boxes**



⚠ If Parent/Carer Details are not eligible, use the 'Switch' button to check eligibility on 'Partner Details' ⇄ Switch



On the 'Funding Details' tab complete the following:

- Start Date
- End Date
- Weeks attended in Term
- Tick 'Attends Two Days or More' box if the child is accessing more than 10 hours
- 'Nominated for DAF' - select 'No'
- Type in the child's eligibility code and then press 'Check Eligibility Code' button
- Enter weekly 'Expanded Hours' the child will be claiming at your setting
- Select the days in which the child is attending your setting
- Input any hours that the parent pays for in the 'Non-Funded Hours' box if applicable

Census information: For Term Time claims, please enter 38 weeks. For independent schools that offer less than 38 weeks, please enter the actual annual weeks provided.

Press **'SAVE'**

All 2 year olds – Eligibility Scenarios

The below table is a breakdown of the maximum hours you may enter for each scenario depending on the eligibility outcome:

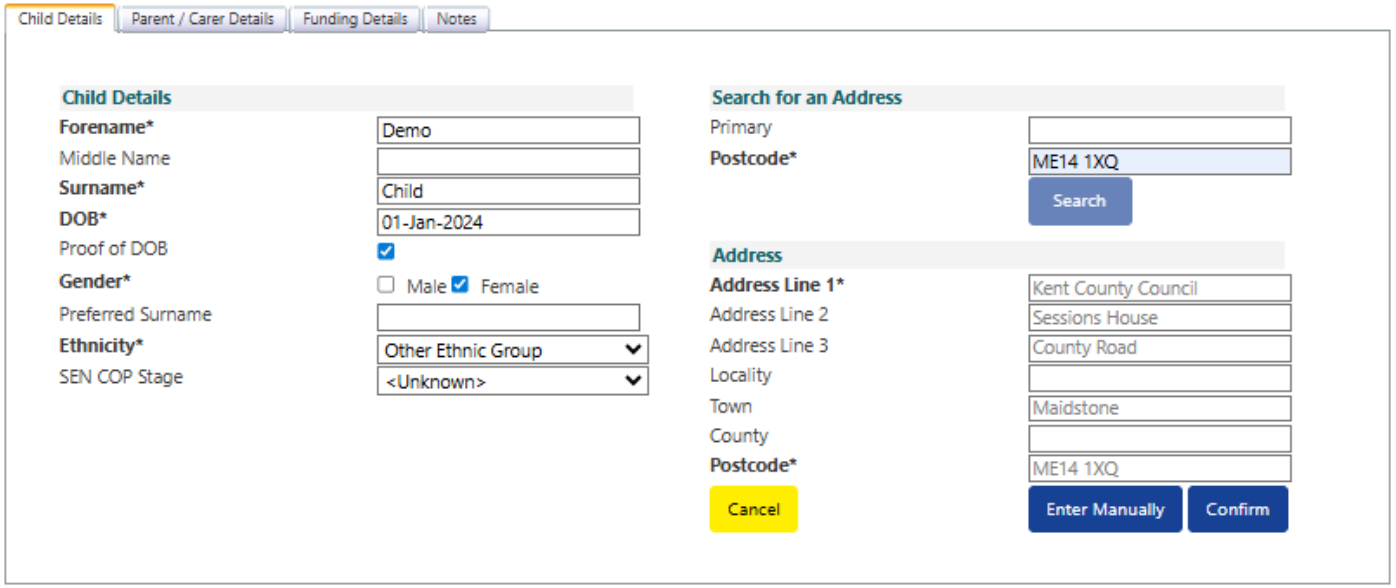
Entitlement Child Eligible for	Eligibility Synergy	Funded Hours	Expanded Hours
Working entitlement	Funded X Expanded ✓	Nil	Up to 30 hours
Working entitlement & Early Learning for 2 Year Olds (EL2)	Funded ✓ Expanded ✓	Up to 15 hours	Up to 15 hours
Early Learning for 2 Year Olds (EL2)	Funded ✓ Expanded X	Up to 15 hours	Nil
Eligibility not confirmed	Funded X Expanded X	Up to 15 hours*	Nil

⚠ * Funded hours can still be entered but may be rejected by the LA

If only a working code has been provided and a not eligible result is present, **do not enter** hours under funded unless they are EL2 eligible

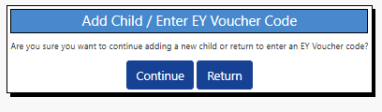
All 2 year olds – Add Child with Working Entitlement





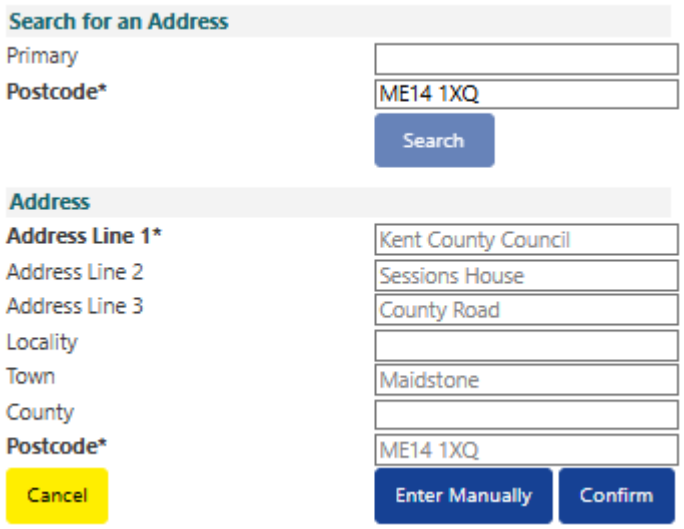
Select '**Add Child**' for new Working Entitlement children or non-valid EY Voucher

A pop up will ask you if you wish to continue to 'Add Child' or 'Return to enter an EY Voucher', select **'Continue'**



Under the 'Child Details' tab enter:

- Forename
- Surname
- DOB
- Tick proof of DOB (if seen)
- Select the child's gender
- Select child's ethnicity
- If the child has additional needs but they do not have an Education Health and Care Plan (EHCP) in place, please record the SEN COP Stage as 'SEN Support'. Otherwise leave as <Unknown>.
- Enter house name or number
- Enter child's postcode
- Click on the '**Search**' button



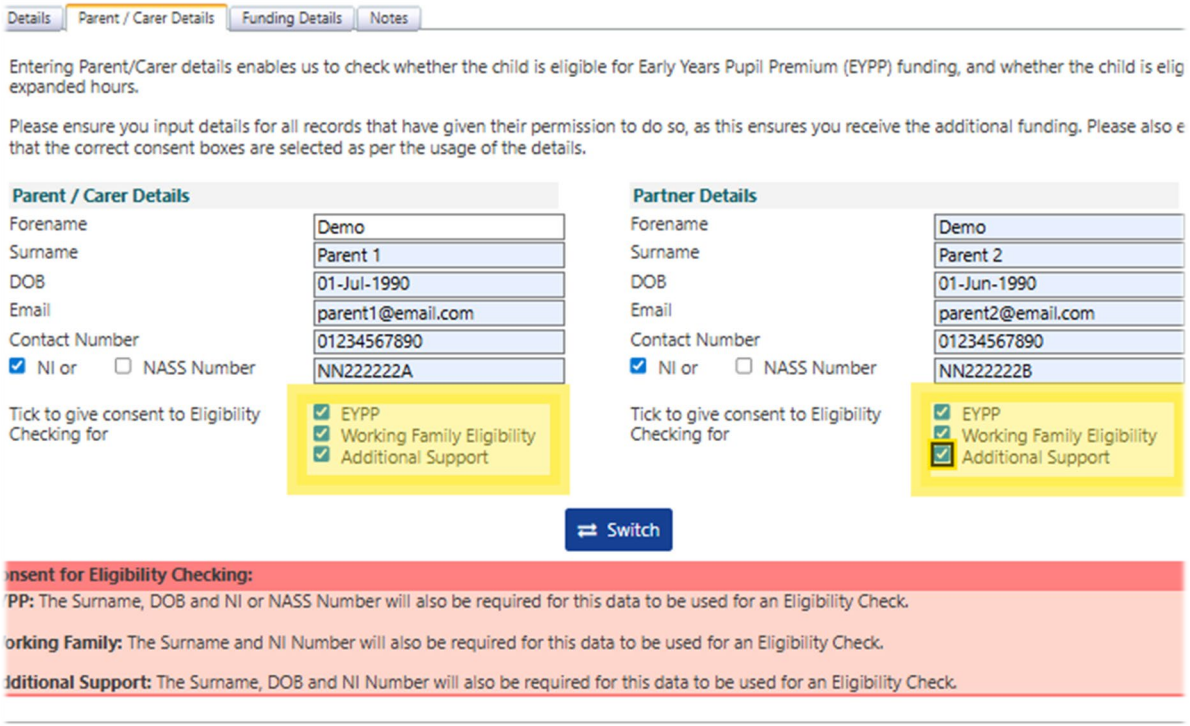
Enter the child address details:

- In the **'Primary'** field, enter the **house name or number**.
- Then, enter the **postcode**.
- Click **'Search'** to locate and update the address.

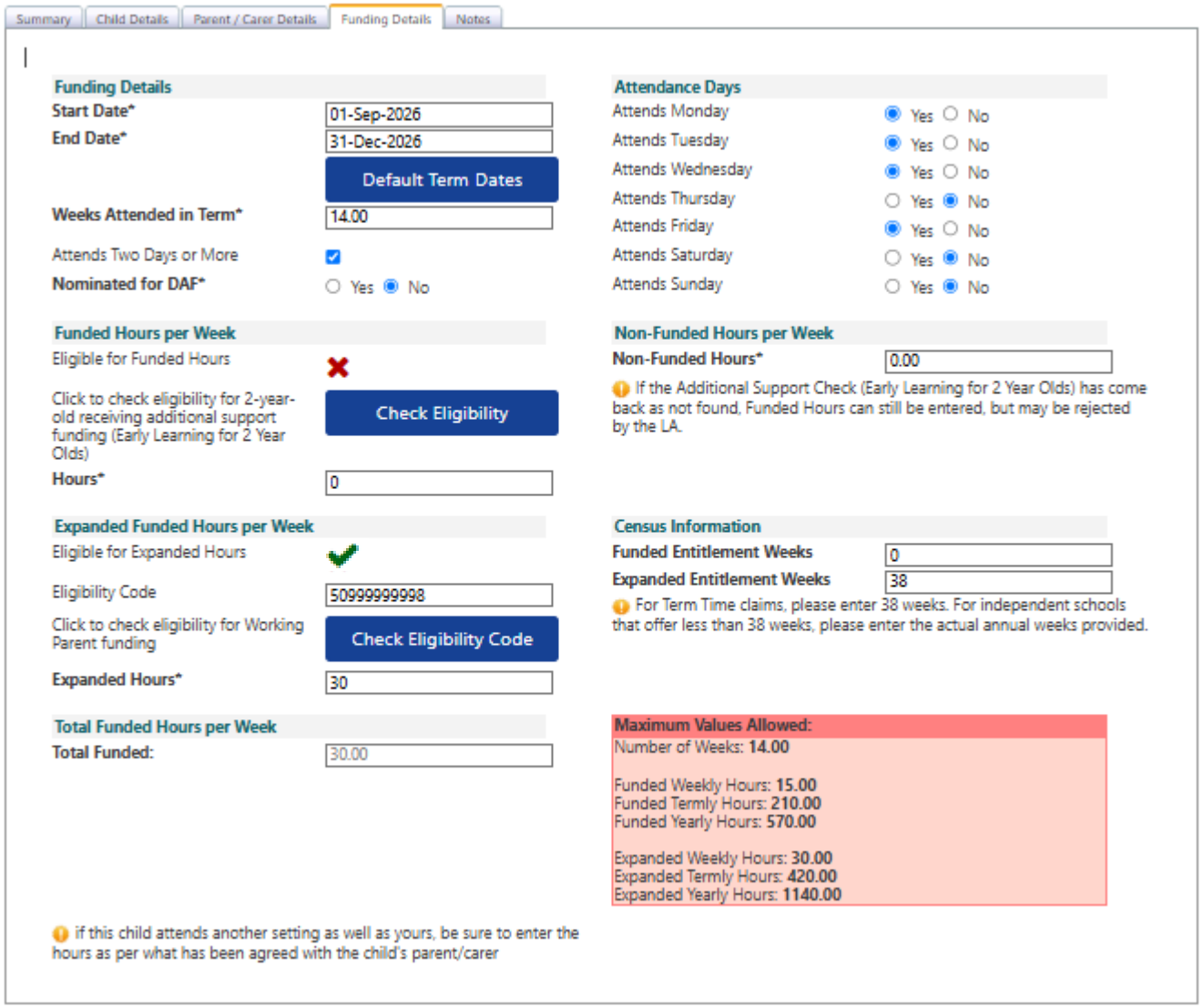
If the populated address is correct, press '**Confirm**' if not press '**Enter Manually**' and input correct address.

Once the Child details have been completed, select the 'Parent/Carer Details' tab.

- Enter the parent / carer forename and surname
- National Insurance or NASS number
- Date of birth
- **Tick all 3 consent boxes**



⚠ If Parent/Carer Details are not eligible, use the 'Switch' button to check eligibility on 'Partner Details' ⇄ Switch



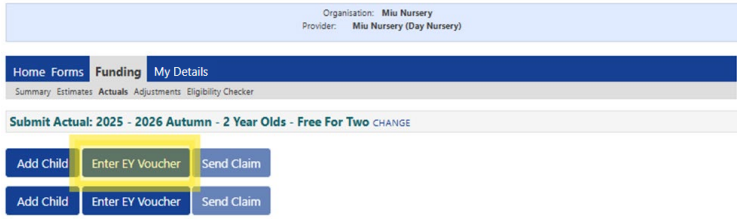
On the 'Funding Details' tab complete the following:

- Start Date
- End Date
- Weeks attended in Term
  Tick 'Attends Two Days or More' box if the child is accessing more than 10 hours
- 'Nominated for DAF' - select 'No'
  - Click 'Check Eligibility' to run the EL2 check.
    - ✓ If eligible, enter first 15 hours in the Funded Hours box.
    - X If not eligible, enter 0 in the Hours box under Funded Hours per Week.
- Type in the child's eligibility code and then press 'Check Eligibility Code' button
- Enter weekly 'Expanded Hours' the child will be claiming at your setting
- Select the days in which the child is attending your setting
- Input any hours that the parent pays for in the 'Non-Funded Hours' box if applicable

Census information: For Term Time claims, please enter 38 weeks. For independent schools that offer less than 38 weeks, please enter the actual annual weeks provided.

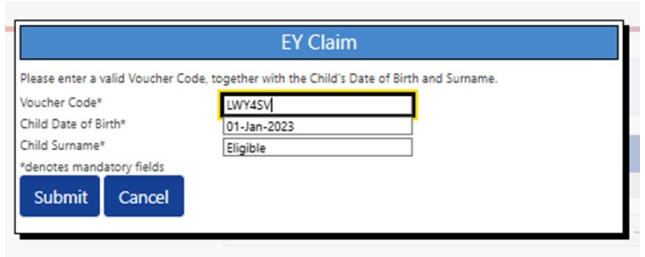
Press **'SAVE'**

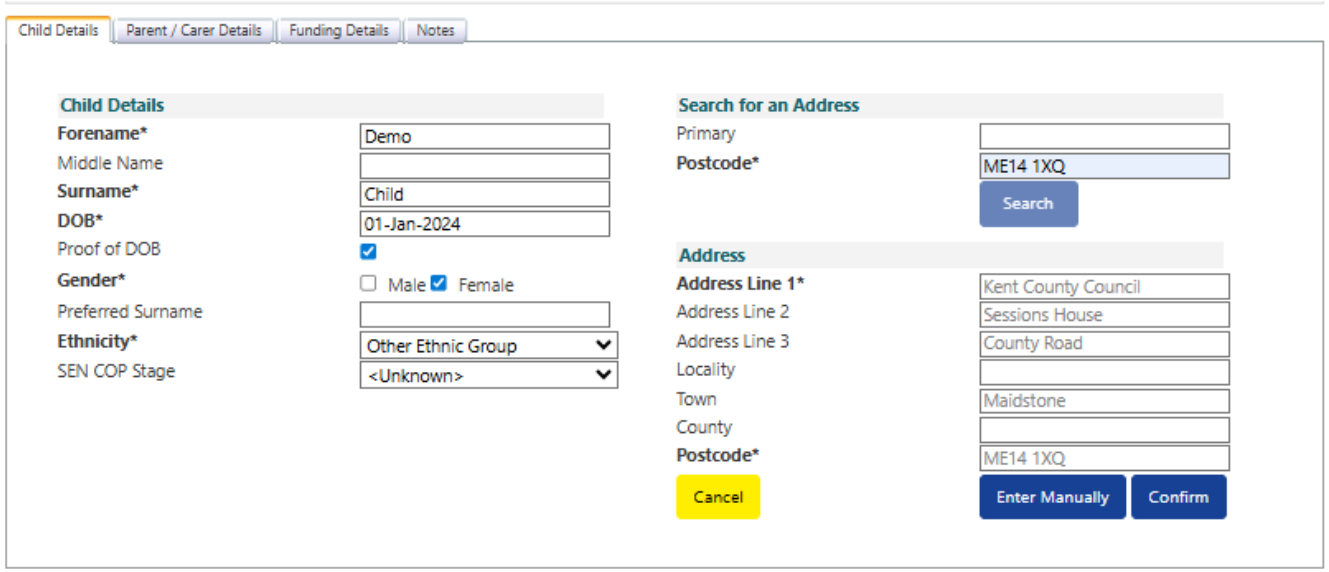
All 2 year olds- EY Voucher



For children accessing the Disadvantaged 2-year-old funding (EL2) select **'Enter EY Voucher'**

Input the character Voucher Code, Child's Date of birth, Child's Surname and then press '**Submit**'

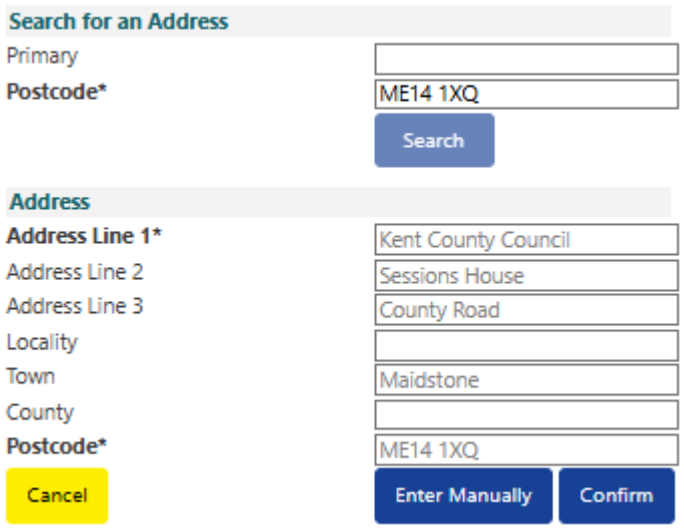




Under the 'Child Details' tab enter or check:

- Forename
- Surname
- DOB
- Tick proof of DOB (if seen)
- Child's gender
- Child's ethnicity
- If the child has additional needs but they do not have an Education Health and Care Plan (EHCP) in place, please record the SEN COP Stage as 'SEN Support'. Otherwise leave as <Unknown>.
- Enter house name or number
- Enter child's postcode
- Click on the '**Search**' button

⚠ If an error message appears when entering the EY Voucher code, recheck the details and try again. If it still does not accept the data, select the 'add child' button to continue with the claim. **Please note:** payment is not guaranteed without eligibility being confirmed.



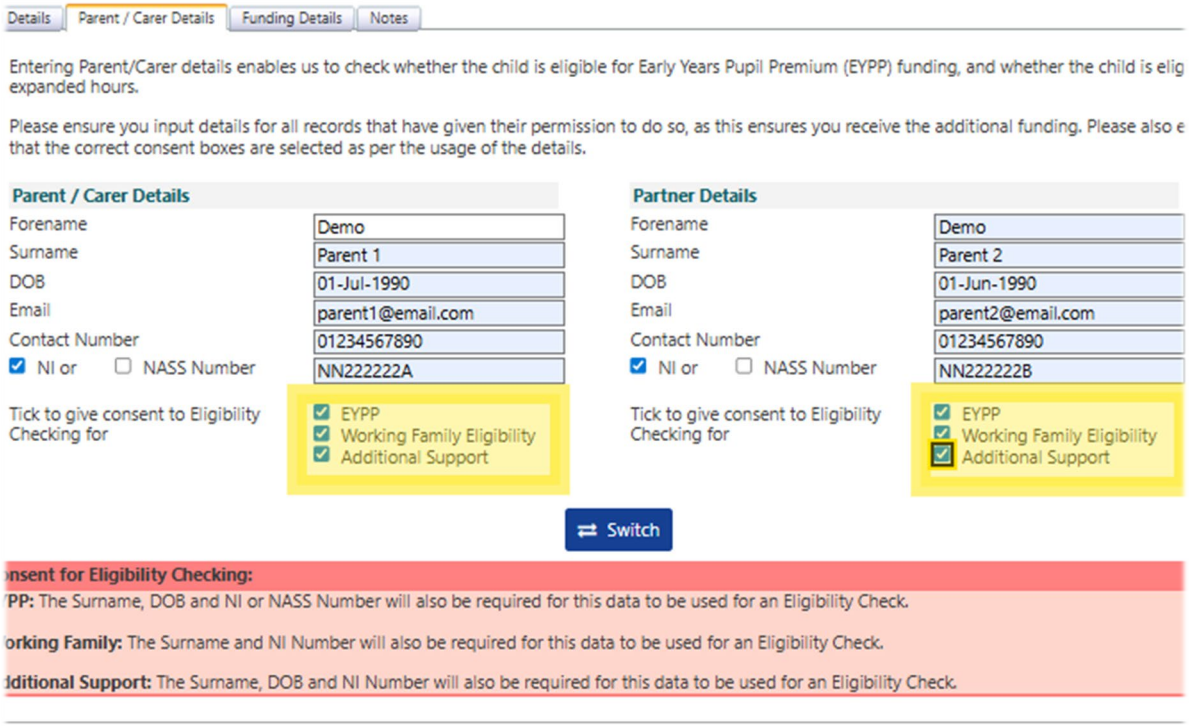
Enter the child address details:

- In the **'Primary'** field, enter the **house name or number**.
- Then, enter the **postcode**.
- Click **'Search'** to locate and update the address.

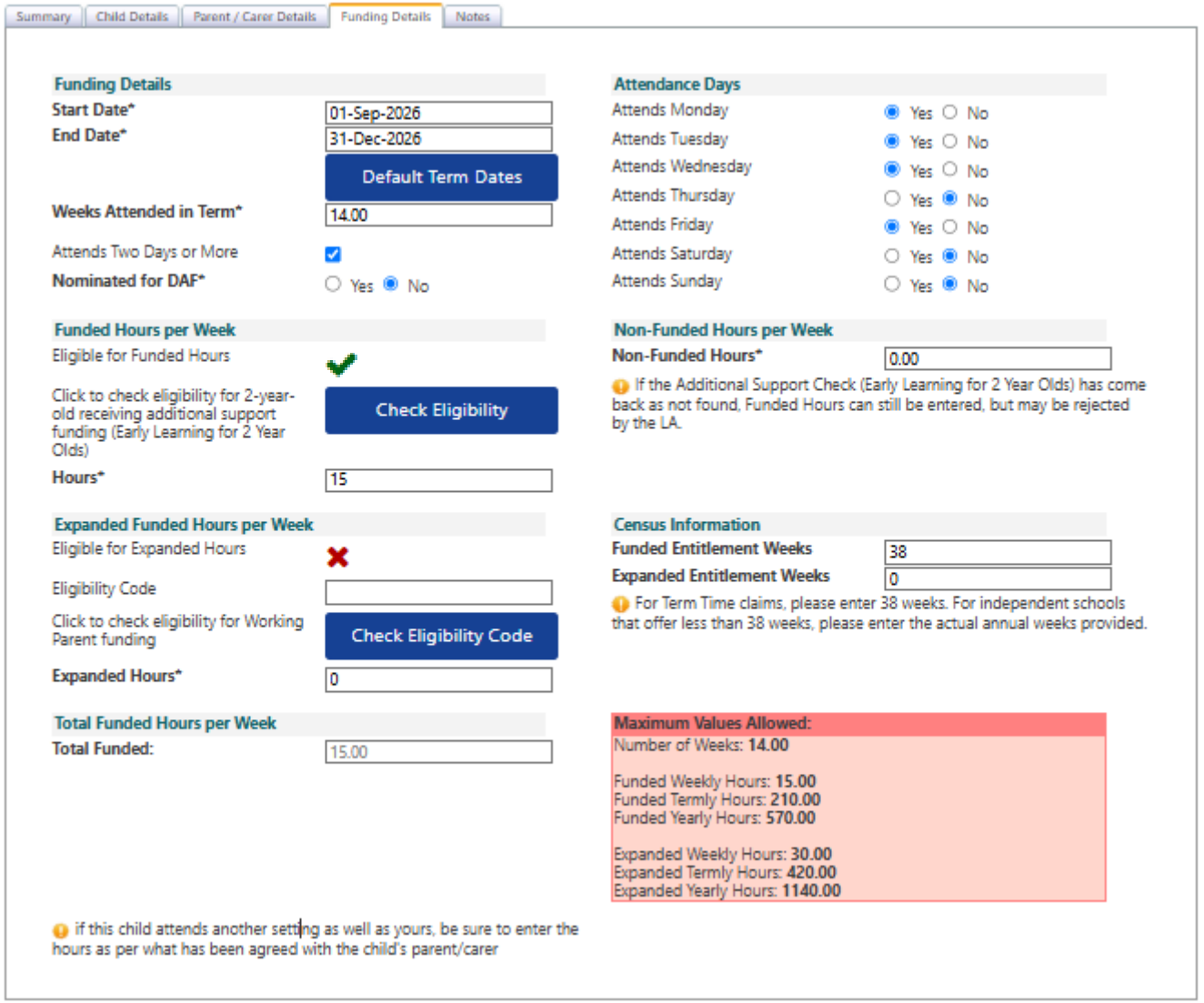
If the populated address is correct, press '**Confirm**' if not press '**Enter Manually**' and input correct address.

Once the Child details have been completed, select the 'Parent/Carer Details' tab.

- Enter the parent / carer forename and surname
- National Insurance or NASS number
- Date of birth
- **Tick all 3 consent boxes**



If Parent/Carer Details are not eligible, use the 'Switch' button to check eligibility on 'Partner Details' ⇄ Switch



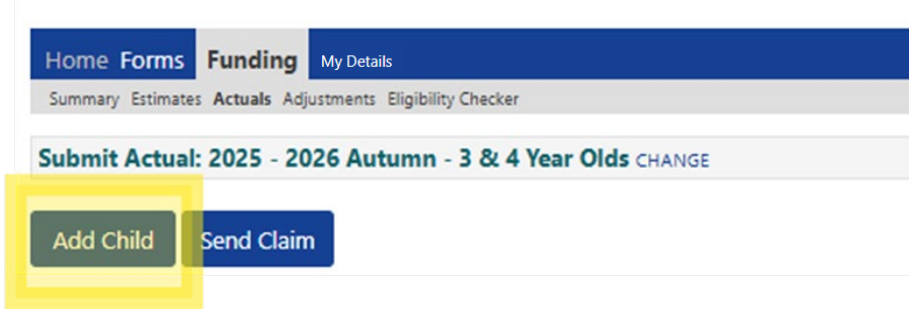
On the 'Funding Details' tab complete the following:

- Start Date
- End Date
- Weeks attended in Term
- Tick 'Attends Two Days or More' box if the child is accessing more than 10 hours
- 'Nominated for DAF' - select 'No'
- Under 'Funded Hours per Week' type enter the number of hours the child will be claiming at your setting
- If an EY Voucher code was used, the Check Eligibility function will not be available.
- If no EY voucher code has been used when starting the claim, press the 'child eligible' button to check for EL2 eligibility.
- Under 'Expanded Funded Hours per Week' type in 0 the 'Hours' box
- Select the days in which the child is attending your setting
- Input any hours that the parent pays for in the 'Non-Funded Hours' box if applicable

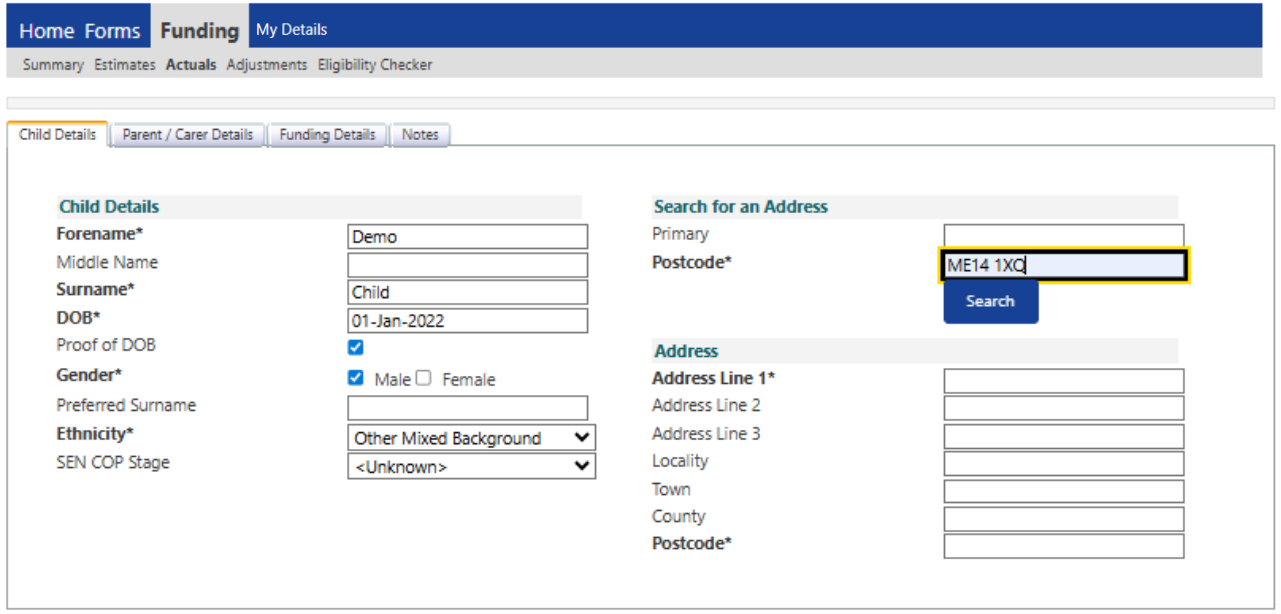
Census information: For Term Time claims, please enter 38 weeks. For independent schools that offer less than 38 weeks, please enter the actual annual weeks provided.

Press **'SAVE'**

3 & 4 year old Universal and Extended Entitlement

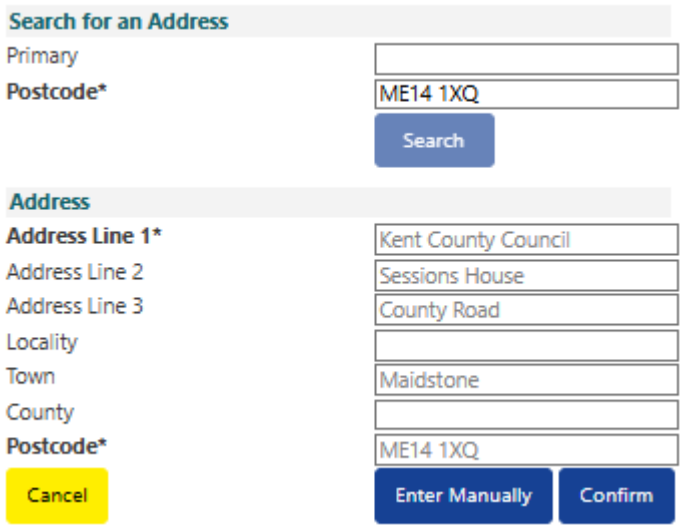


Select '**Add Child**'



Under the 'Child Details' tab enter:

- Forename
- Surname
- DOB
- Tick proof of DOB (if seen)
- Select the child's gender
- Select child's ethnicity
- If the child has additional needs but they do not have an Education Health and Care Plan (EHCP) in place, please record the SEN COP Stage as 'SEN Support'. Otherwise leave as <Unknown>.
- Enter house name or number
- Enter child's postcode
- Click on the '**Search**' button



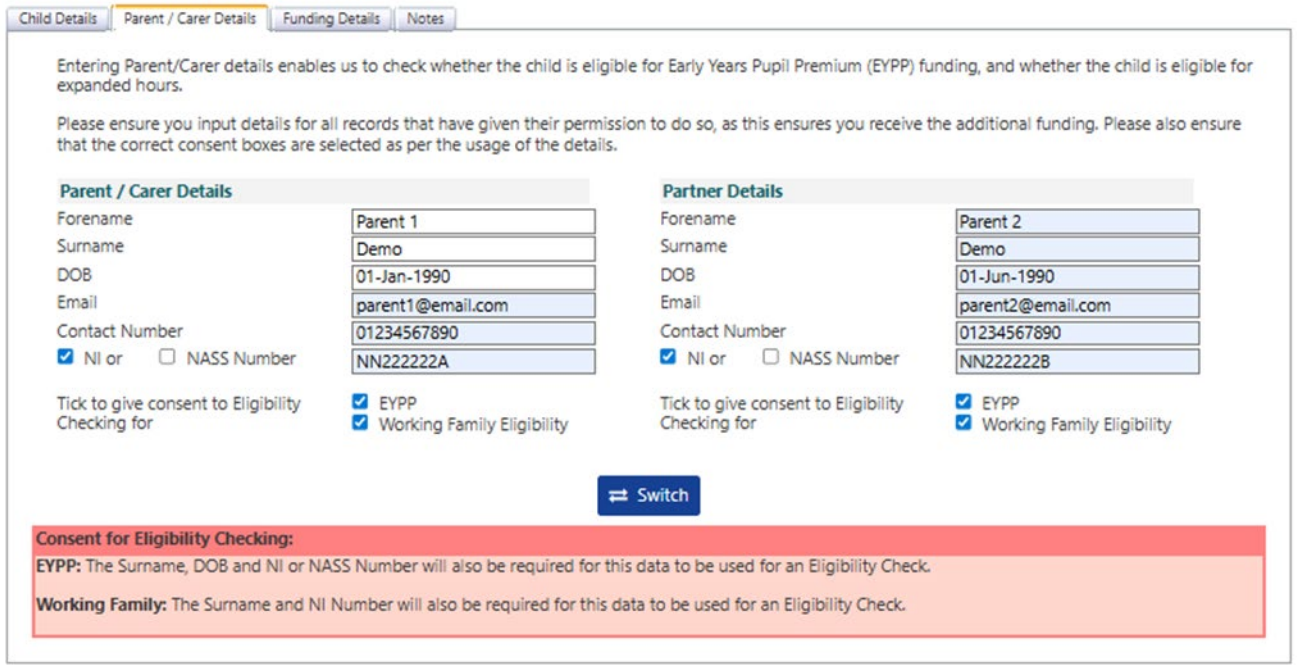
Enter the child address details:

- In the **'Primary'** field, enter the **house name or number**.
- Then, enter the **postcode**.
- Click **'Search'** to locate and update the address.

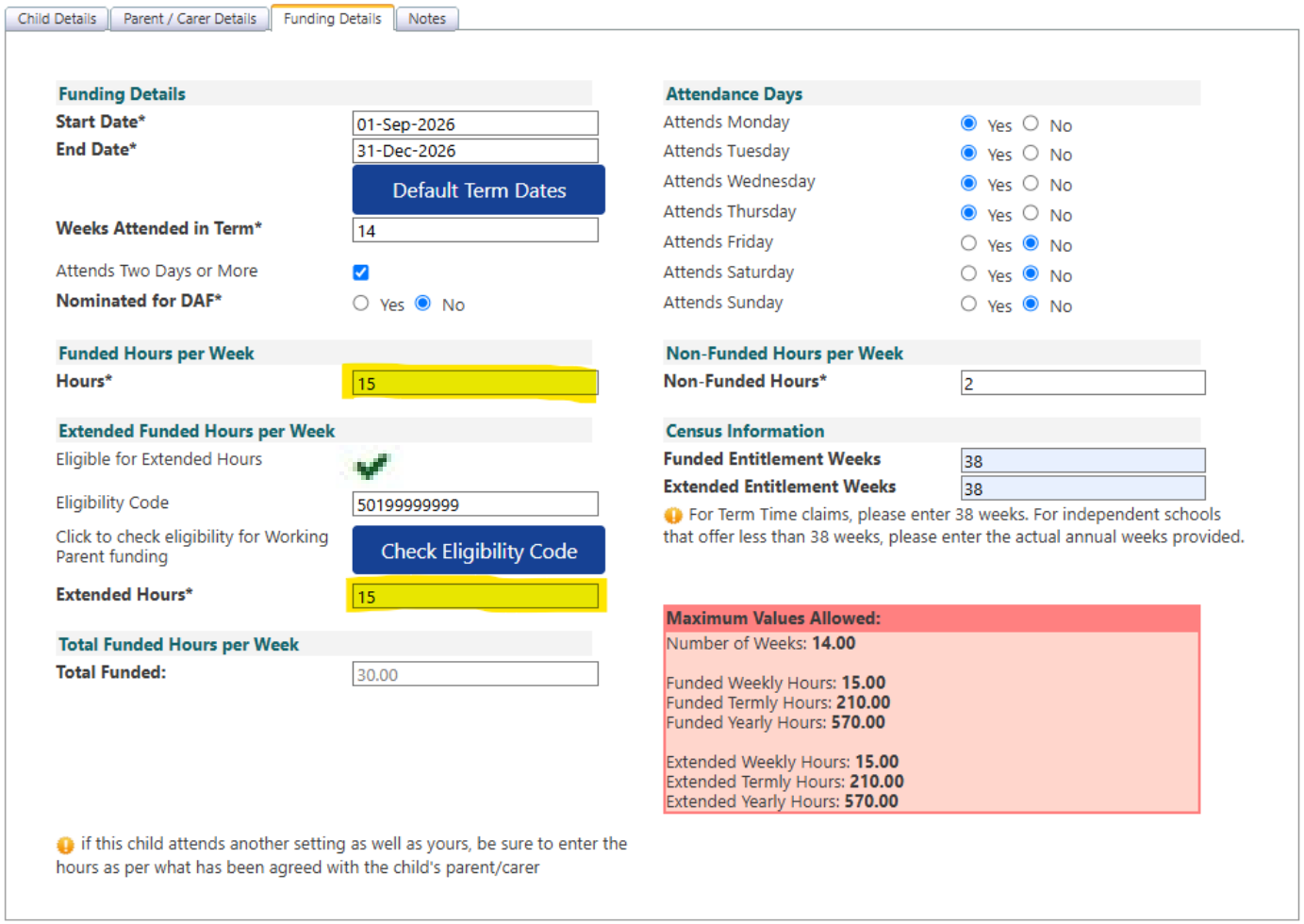
If the populated address is correct, press '**Confirm**' if not press '**Enter Manually**' and input correct address.

Once the Child details have been completed, select the 'Parent/Carer Details' tab.

- Enter the parent / carer forename and surname
- National Insurance or NASS number
- Date of birth
- **Tick both consent boxes**



If Parent/Carer Details are not eligible, use the 'Switch' button to check eligibility on 'Partner Details' ⇄ Switch



On the 'Funding Details' tab complete the following:

- Start Date
- End Date
- Weeks attended in Term
- Tick 'Attends Two Days or More' box if the child is accessing more than 10 hours
- 'Nominated for DAF' - select 'No'
- Under 'Funded Hours per Week' type in the number of **universal** hours being claimed at the setting in 'Hours' box

If the child is accessing the **Working Parent Entitlement** complete the 'Extended Funded Hours per week section:

- Type in the child's eligibility code and then press 'Check Eligibility Code' button
- Enter weekly 'Extended Hours' the child will be claiming at your setting
- Select the days in which the child is attending your setting
- Input any hours that the parent pays for in the 'Non-Funded Hours' box if applicable

Census information: For Term Time claims, please enter 38 weeks. For independent schools that offer less than 38 weeks, please enter the actual annual weeks provided.

Press **'SAVE'**

Working Parent Entitlement Eligibility Check Messages:



The eligibility code has been found and working entitlement hours can be submitted.



This means that a claim for working entitlement hours **cannot** be submitted, as the code is not valid for the current term. Please contact the Early Years Management Information team and they will investigate further.
For 3&4 year olds, to enable you to submit the universal hours, set the extended funded hours to 0.00 whilst this is investigated (leave all other information in place).
For All 2 Year Olds, please **do not** enter hours in the funded hours, unless they are eligible for EL2.



This means the details entered do not match an eligible record. Go back and re check the 11-digit eligibility code, parent national insurance number and child's date of birth. If you have the partner details, you can also go back to the 'Parent/ Carer Details' tab and press the 'Switch' button. This will check the other parent/carers details. To complete the additional check, go back to the funding details tab and re press the blue eligibility button.
For All 2 Year Olds, please **do not** enter hours in the funded hours, unless they are eligible for EL2.

Submitting A Claim

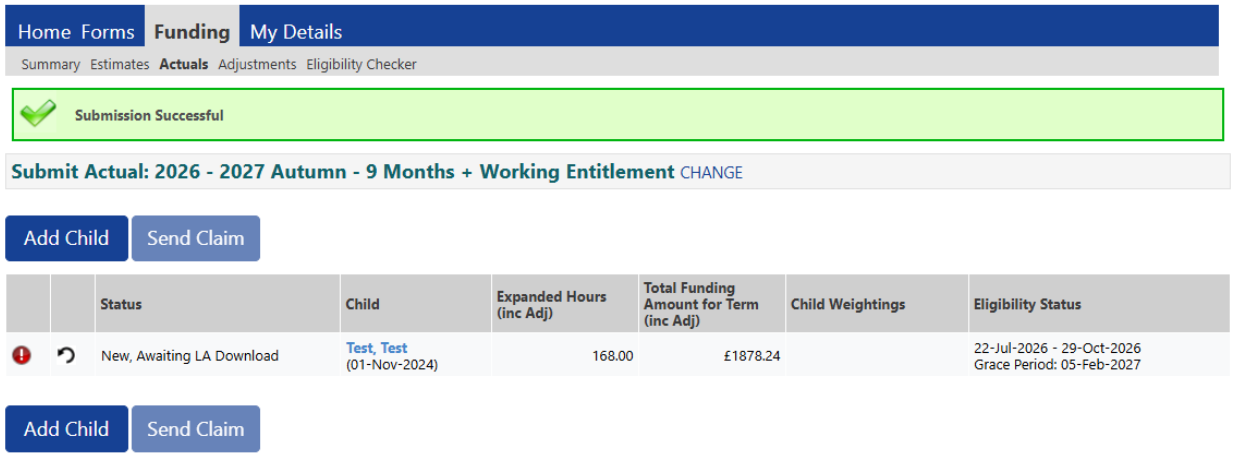
Once you have added all children under an entitlement, select **Send Claim**.

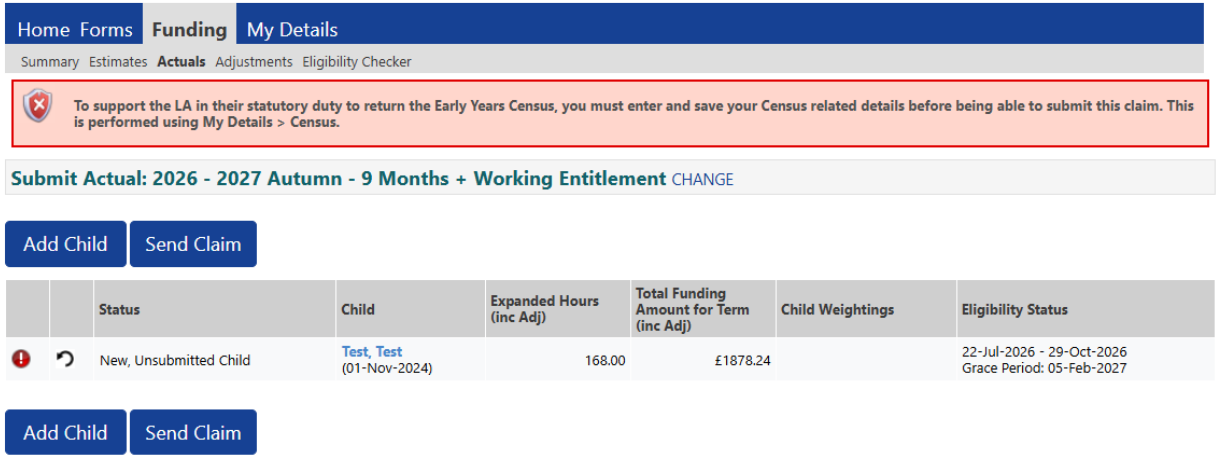
We recommend taking a screenshot of your claim in case an error occurs.

If a red banner appears, complete the termly census before selecting **Send Claim** again.

If claiming for more than one type of funding, please ensure all funding types are sent separately after submitting the census.

The status column indicates if the claim has been submitted and if it has been accepted for payment by the Early Years Management Information team.





Tip: You can submit more than once whilst the portal is open. It is best to complete the continuing children's claims first; these can be submitted once reviewed. You can then add any new children and submit those once added. Complete one entitlement at a time to ensure all claims are submitted.

Status Column Index

Message	Explanation
Awaiting LA Deletion	This means an EXISTING child has now been submitted as a deletion to the Early Years Management Information team. It is waiting for the team to delete the record. Once they delete it, the child record will disappear from your screen.
New, unsubmitted claim	This means a NEW child has been entered, but not submitted, press ‘Send Claim’.
New, awaiting LA download	This means a NEW child has now been submitted to the Early Years Management Information team. It is waiting for the team to start the payment process. Once they start to process it, this status description will disappear from your screen.
Awaiting LA Deletion	The child’s record is awaiting a member of the MI team to delete.
Unsubmitted Claim	This means an EXISTING child has been amended, but not submitted, press ‘Send Claim’.
Awaiting LA Download	This means an EXISTING child has now been submitted to the Early Years Management Information team. It is waiting for the team to start the payment process. Once they start to process it, this status description will disappear from your screen.

Contact Details

Email: miearlyyears@kent.gov.uk

Phone number: 03000 421 612

Kelsi Website: Claiming the Free Entitlements- KELSI