Submitting an Adjustment Claim Via the Synergy FIS Provider Portal

Guidance for Early Years Providers

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Introduction

The Synergy Family Information Service (FIS) Provider Portal is used by childcare providers to claim Early Years funding for children aged 9 Months to 4 years old.
The Portal links directly into the Synergy system that the Early Years Management Information team use to process funding payments.

Please note that the Synergy system is not used for Disability Access Funding.

Accessing the Provider Portal via Kelsi

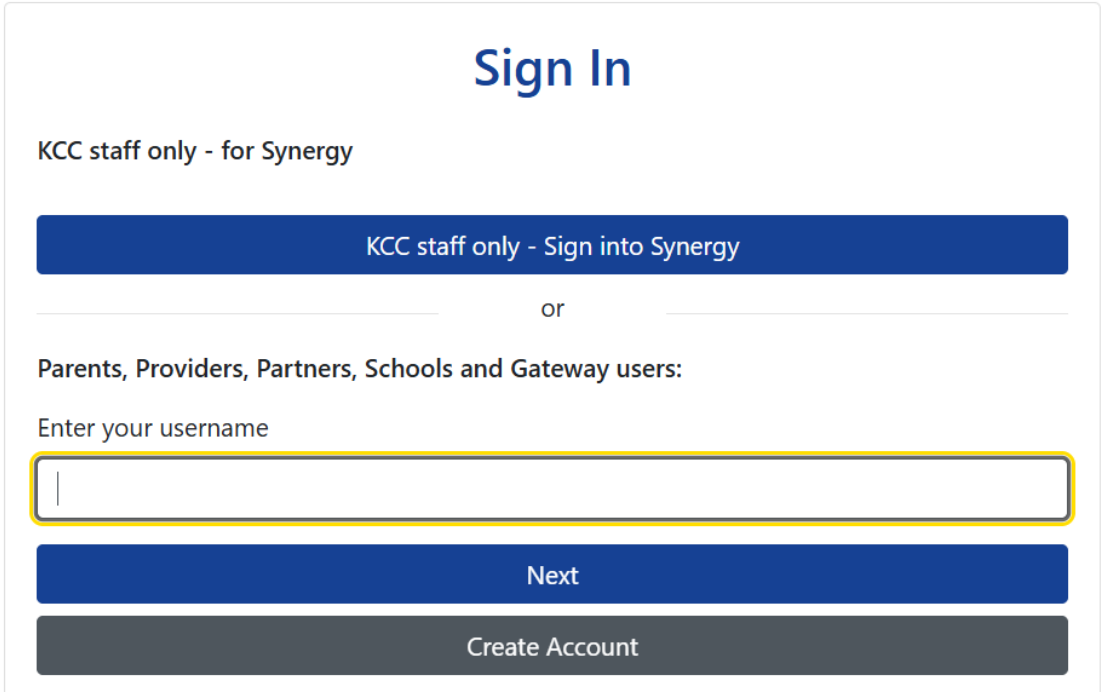
When you receive an email from the Early Years Management Information team advising you that the Provider Portal is open for submission, you will need to login to the system to submit your claim.

Please always log onto the Portal through this Kelsi page and not through a saved link, as this can cause problems in submitting:
Claiming the Free Entitlements – KELSI

Once this page has loaded, please scroll to the section ‘Synergy Provider Portal’ and use the link to log on.

Logging onto the Provider Portal

When you open the link, please enter your ''User Name'' which is the 6-digit DfE URN for your setting.
Please do not use your email address.

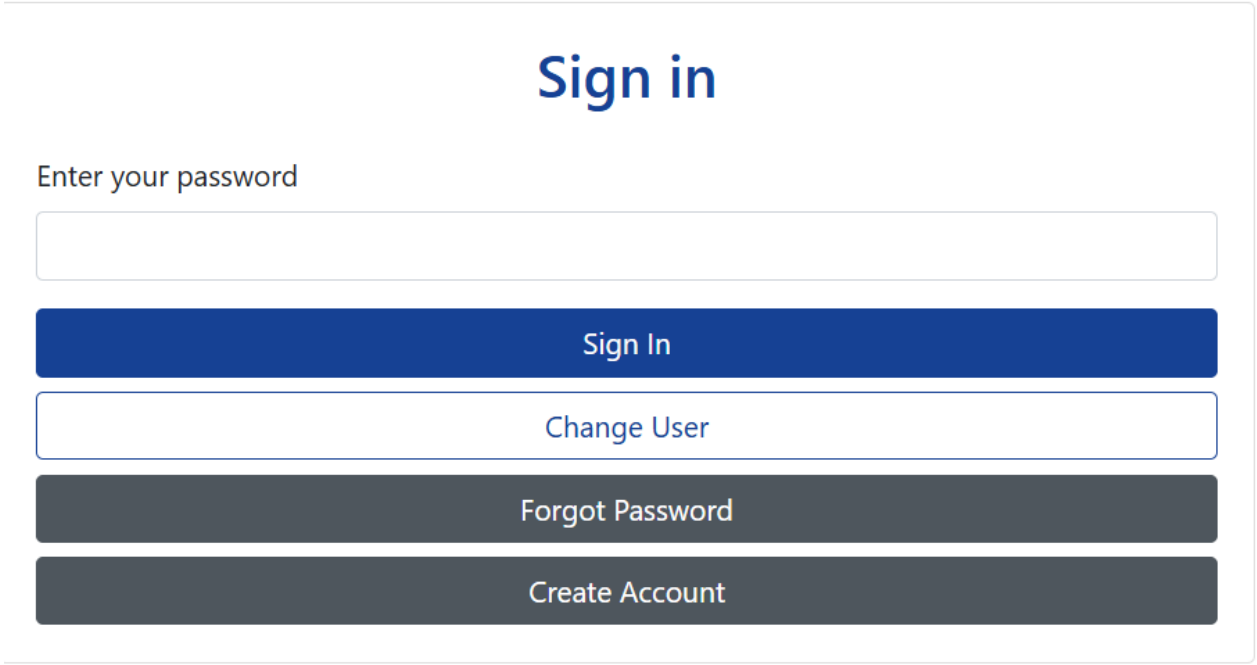


Click on Next.

Then enter your ‘Password’ and click ‘Sign In’.

If you cannot remember your ‘password’, you can reset this. Please refer to the ‘Synergy Passwords’ document on KELSI for details on how to do this. If you have locked your ‘password’, please telephone or email the Early Years Management Information team on 03000 421612 or miearlyyears@kent.gov.uk and we will reset this for you.

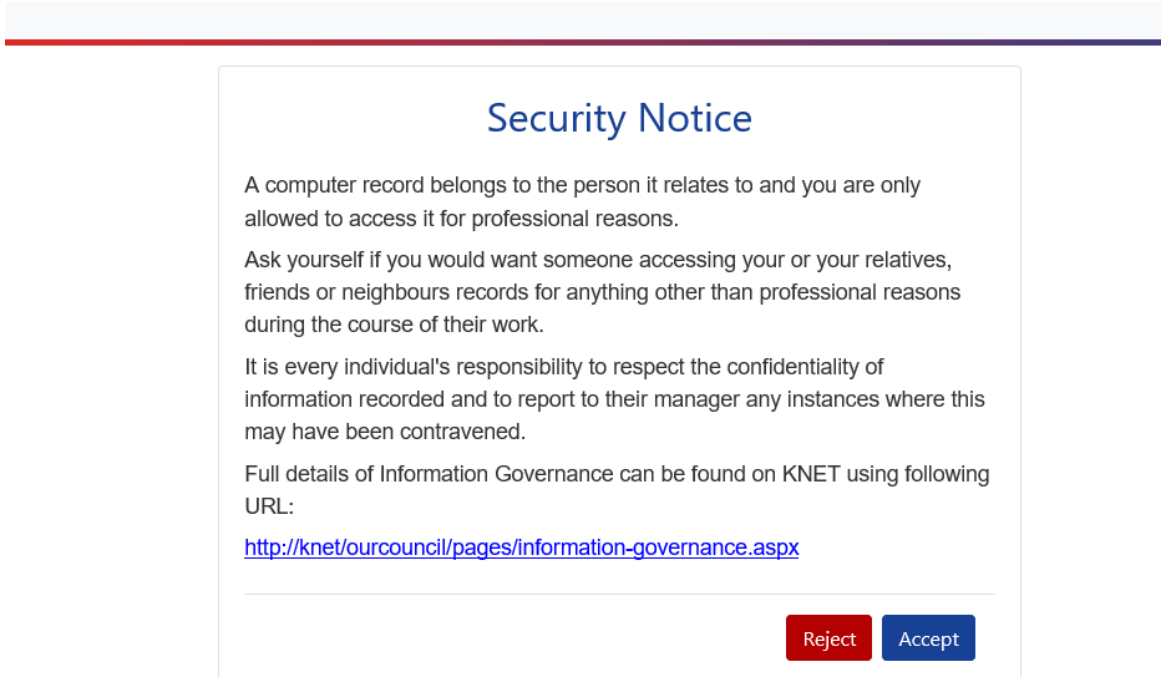
If you type either your user name, password or both incorrectly, you will see “Username or Password are invalid” . **You cannot go back a stage to the user name screen, if this is where the error occurred, so click on the Provider tab to close the link and re-open it again from the Kelsi page.**



Please note: Should you need to change your password, please remember that passwords must be a minimum of 7 characters in length, contain at least one capital letter, one number and cannot be the same as the ‘‘User Name’’. Please be aware that the same password cannot be used more than once.

Security Notice

Once you click on ‘Sign In’, you will now see this screen:

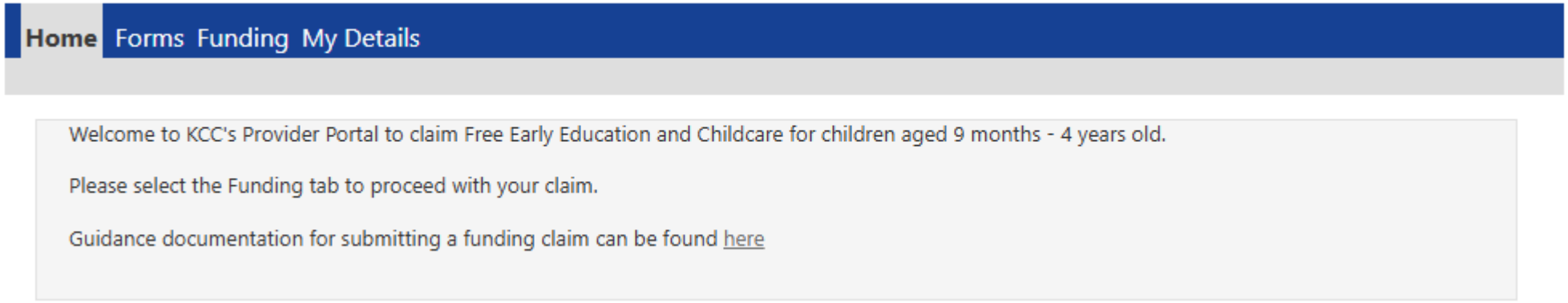


Please click on ‘Accept’. A message will appear saying “You have been signed in and will be re-directed shortly...”. This will take a few seconds and then the 'Home Screen‘ will be displayed.

If you accidently click on ‘Reject’, it will sign you out and you will need to log in again.

Home Screen

Once you have logged in, the ‘Home Screen' will be displayed.



You will now see four tabs; ‘Home’, ‘Forms’, ‘Funding’ and ‘My Details’.

Various notifications and messages will also be displayed on this screen from time to time.

Funding Deadlines

The latest funding calendar, which can be found on KELSI using the link below, shows all the submission date deadlines for the term, including adjustment submission windows and payment dates.

Claiming the Free Entitlements - KELSI

⚠ **Please note:** The date paid in Synergy refers only to the date the payment was processed and not the actual payment date. These dates are provided in the funding calendar.

Which Children to Include

An adjustment can be submitted for a child who started at your setting after headcount week, if they have transferred into Kent from another Local Authority, or if they have not claimed any funded hours in Kent during this term. This is known as a ‘Late Joiner’.

If a child has a Working Parent Entitlement code, this must be valid at the start of term and on the date when the child starts.

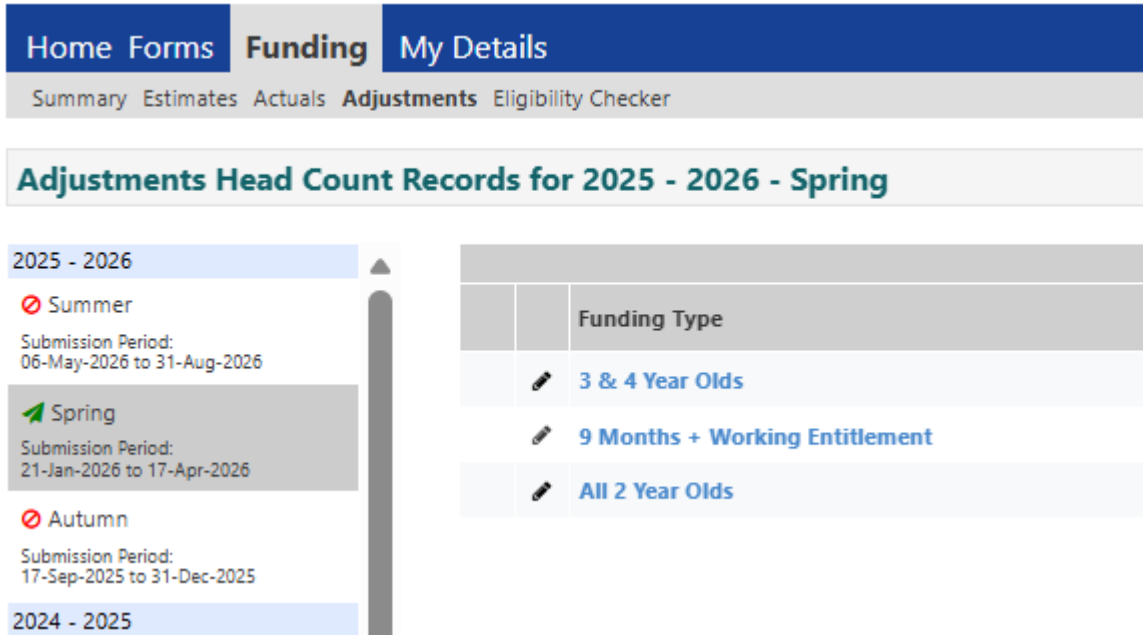
Please note that the funded hours for most entitlements are based on the hours offered in headcount week and cannot be changed unless an error was made on your original submission. A charge will be made to correct an incorrect headcount claim.

Adjustments can also be submitted for a child who was omitted from your headcount claim, but again a charge will be made for these late claims.

Early Learning for 2 Year Olds (EL2), previously known as Free for 2 (FF2), funding hours can be increased during the term up to a maximum of 15 hours per week without charge.

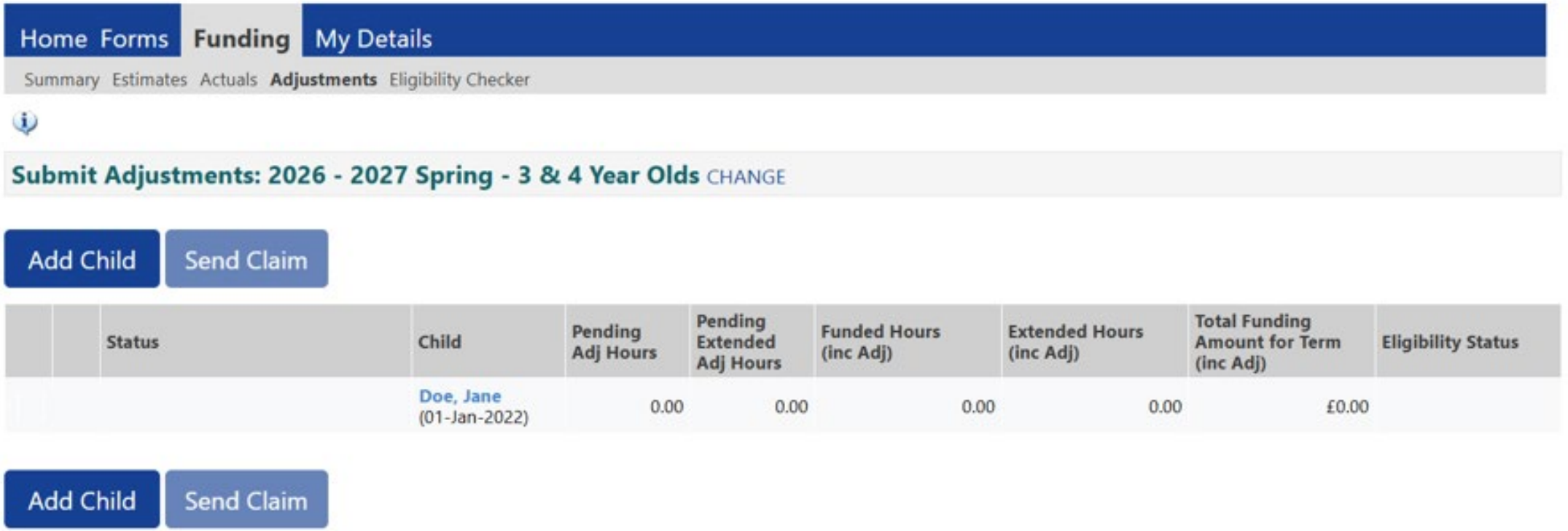
Submitting an Adjustment Claim

1. Click on ‘Funding’ to display the Funding screen with five tabs at the top of the screen: 'Summary', 'Estimates', 'Actuals', 'Adjustments' and "Eligibility Checker‘’.
2. Click the ‘**Adjustments**’ tab.
3. Select the Term.
4. Select the Funding Type you wish to submit an adjustment for by clicking the blue writing.



Ensure that the right term and funding type has been opened, if not click on ‘CHANGE’ to go back to the Summary and select the correct term and funding type.

A list of children you submitted as 'Actuals' will appear that you can now amend by clicking on the child's name. The ‘Add child’ button is shown if you need to add new children.

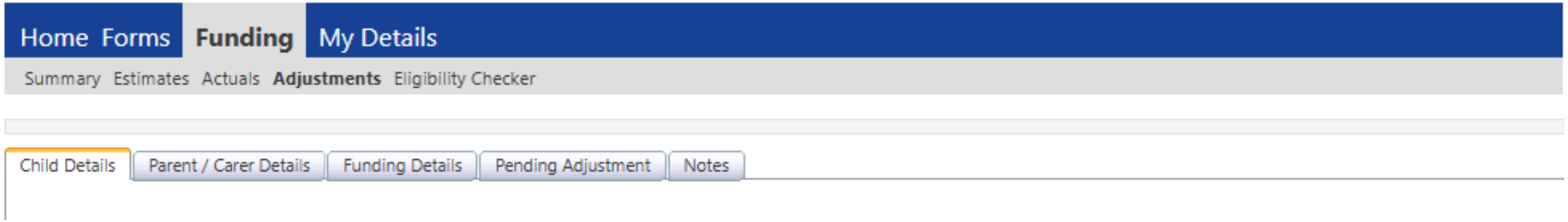


Submitting a Claim for an Existing Child

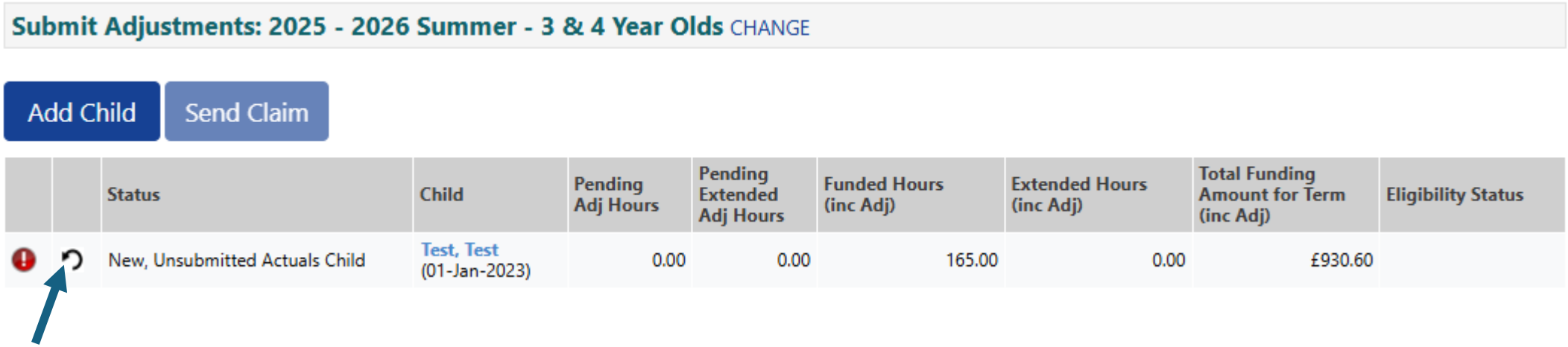
To amend an existing child's claim click on the child's name in the list.

You will be taken to the child's record, which opens by default on the 'Pending Adjustment' tab.

You can then click on all the other tabs, if you need to make other amendments to the child's information, if this has changed since the 'Actual' claim was submitted.



Unfortunately, if you have a child who was saved on the ‘Actuals’ tab but not submitted, it will show as an ‘Unsubmitted Actuals’ child and you will not be able to amend and save this claim as an adjustment.



You will need to use the back arrow button to delete the unsubmitted claim before you can enter the claim to submit an adjustment.

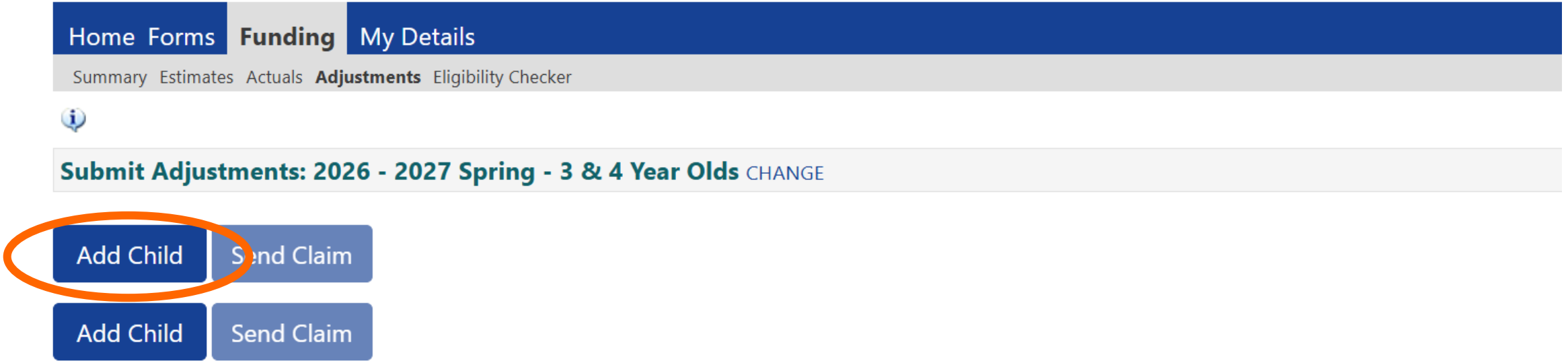
Click Yes to confirm deletion.

You will then be able to click ‘Add Child’ and re-enter the child’s details.



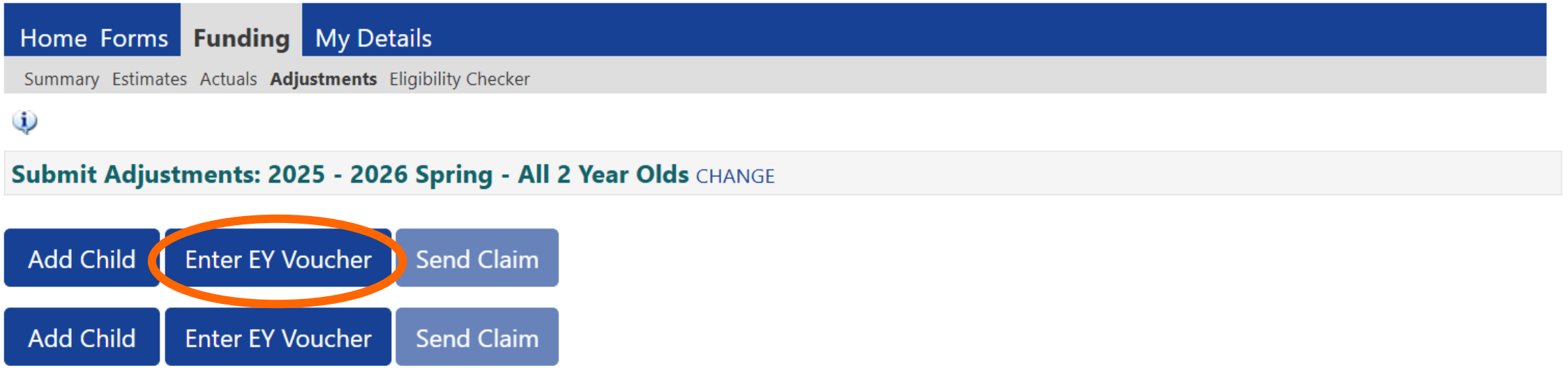
Adding a New Child

To add a child click either of the ‘Add Child’ buttons.

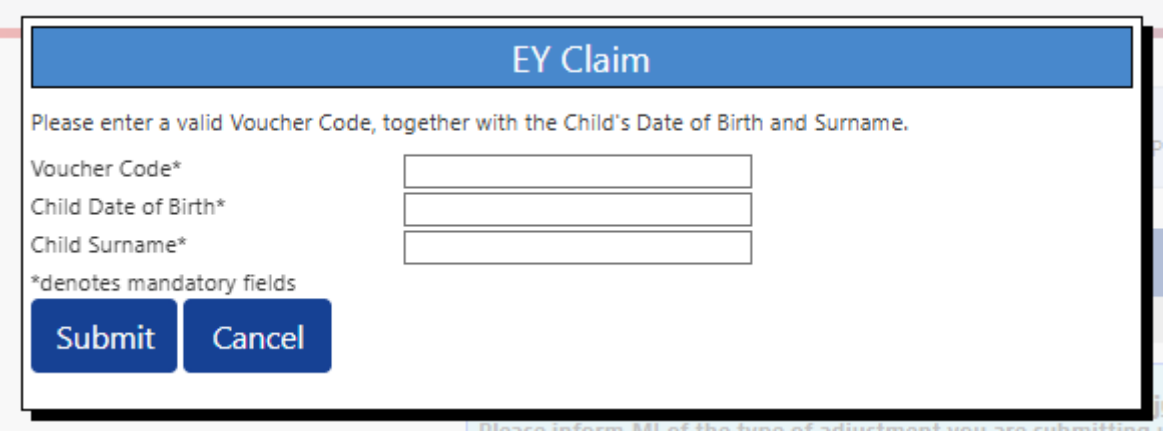


You will be taken to a blank child’s record, which opens by default on the ‘Child Details’ tab.

For All 2 Year Olds there is also the option to add a child using a EL2 (FF2) voucher code.

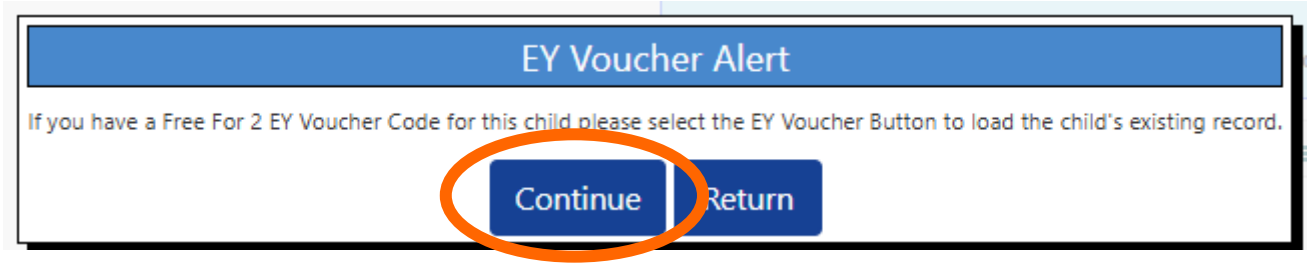


Enter the EL2 (FF2) voucher code, the child's date of birth and the child's surname and click submit.



If the child's details are found, this will open a partially pre-populated claim for the child. It will open on the 'Pending Adjustment' tab as default but you should check the data on the other tabs to ensure it is correct and complete.

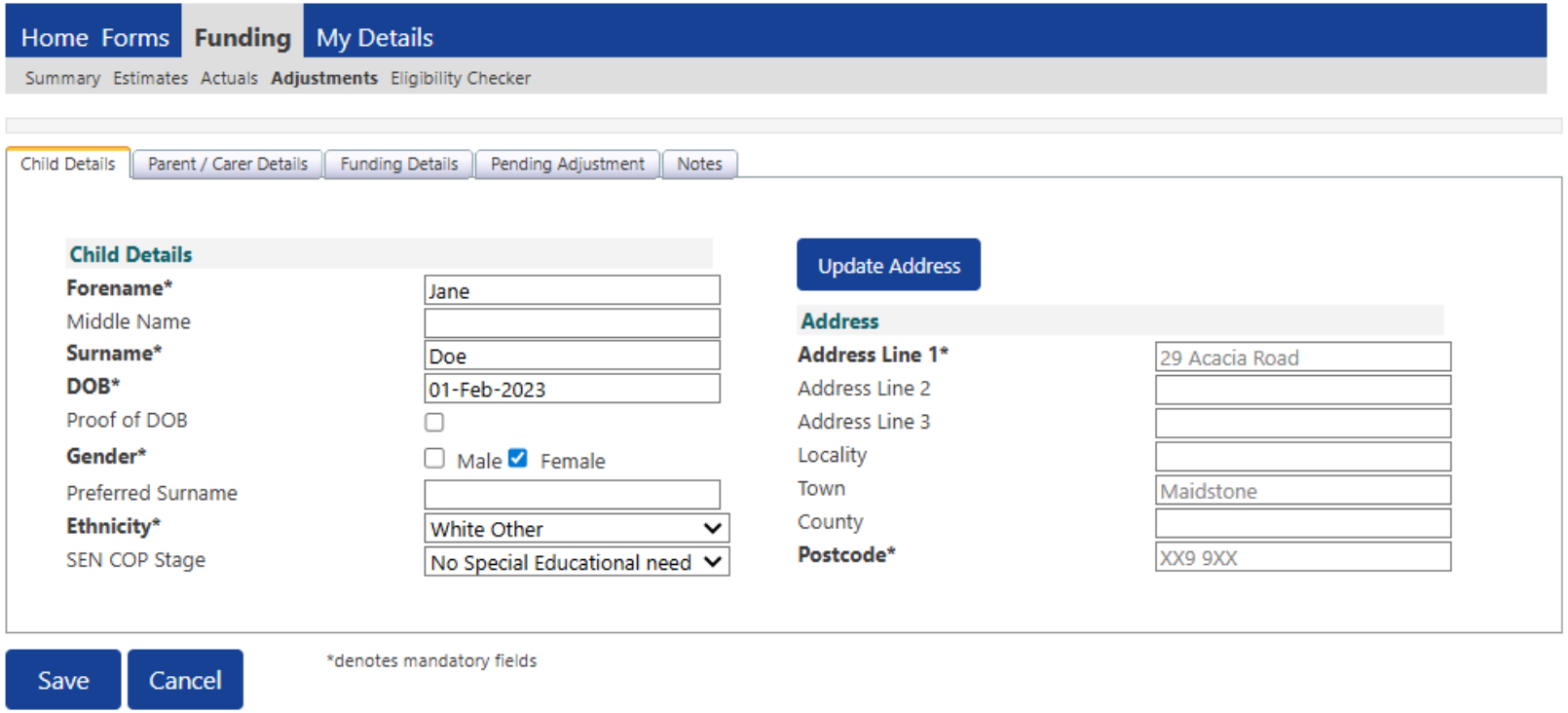
If the details are not found, the child can still be added using the 'Add Child' button in the usual way. You may get an 'EY Voucher Alert' but click 'Continue'.



Child Details Tab

For existing children check that the information shown is still correct and complete. For new children please make sure all mandatory fields marked by an asterisk (*) are completed.

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>.



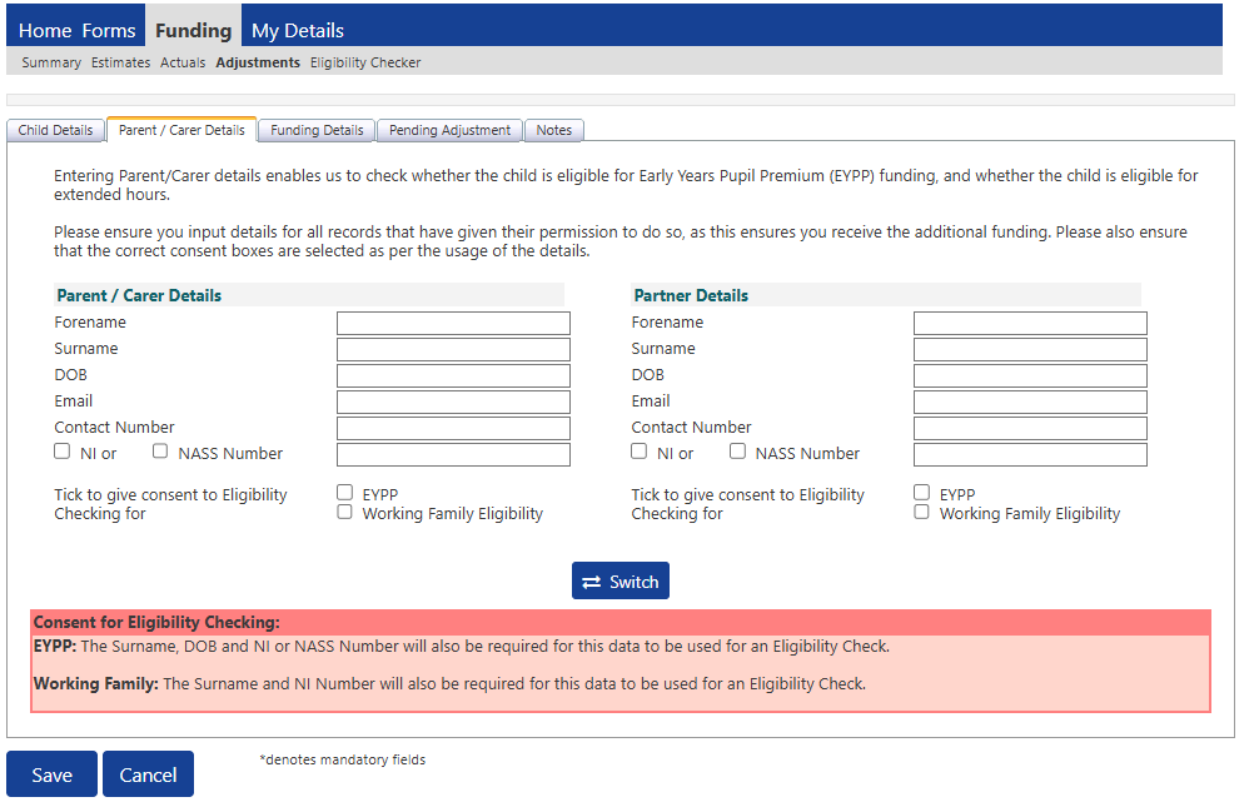
⚠ **Please note:** If a child has changed their name by **deed poll**, or following the completion of an **adoption** order, please contact the Early Years Management Information team on 03000 421612 for guidance. **Please do not amend the child’s name in the Provider Portal.** If names are overwritten in the Provider Portal, it could lead to funding being missed for children.

Parent/Carer Details Tab

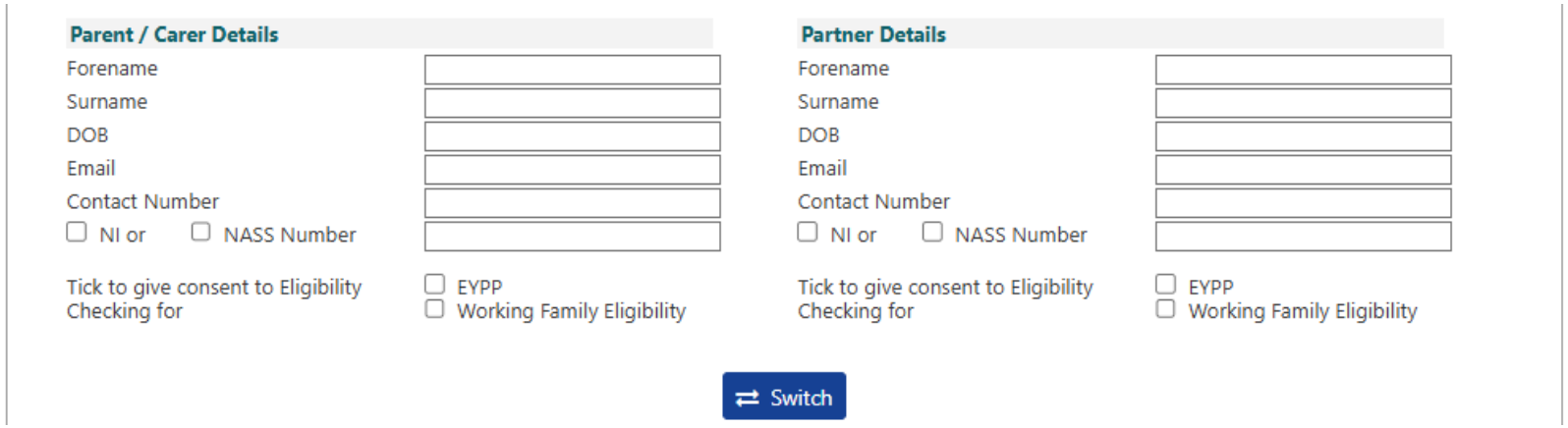
This must be completed for children claiming **working parent entitlement** hours.

Please ensure you input details for all parents that have given their permission to do so. You must tick the box for Working Family Eligibility Check to enable the working parent entitlement hours to be claimed. You must also have carried out a 30-hour validation check through the KELSI website prior to claiming the extended hours in this section.

If the child is not eligible for the extended hours, the completion of this tab is optional, but you should not tick the consent boxes at the bottom unless the forename, surname, DOB and NI (or NASS) are completed.



Parent/Carer Details tab - EYPP



⚠ **Please note:** Management Information **do not** use the Synergy system for **EYPP** applications for adjustment claims.

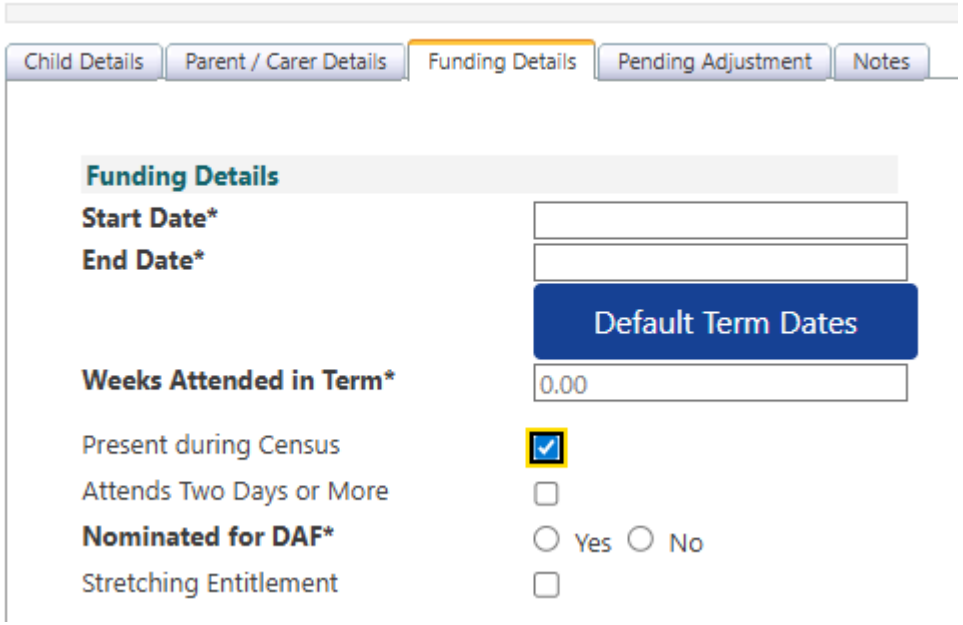
Further information about DAF is available here: Disability Access Fund (DAF) - KELSI

To apply for EYPP funding for an adjustment, please use this form: Early Years Pupil Premium for 9 month olds, 2 year olds and 3 and 4 year olds - Kent County Council

Funding Details tab

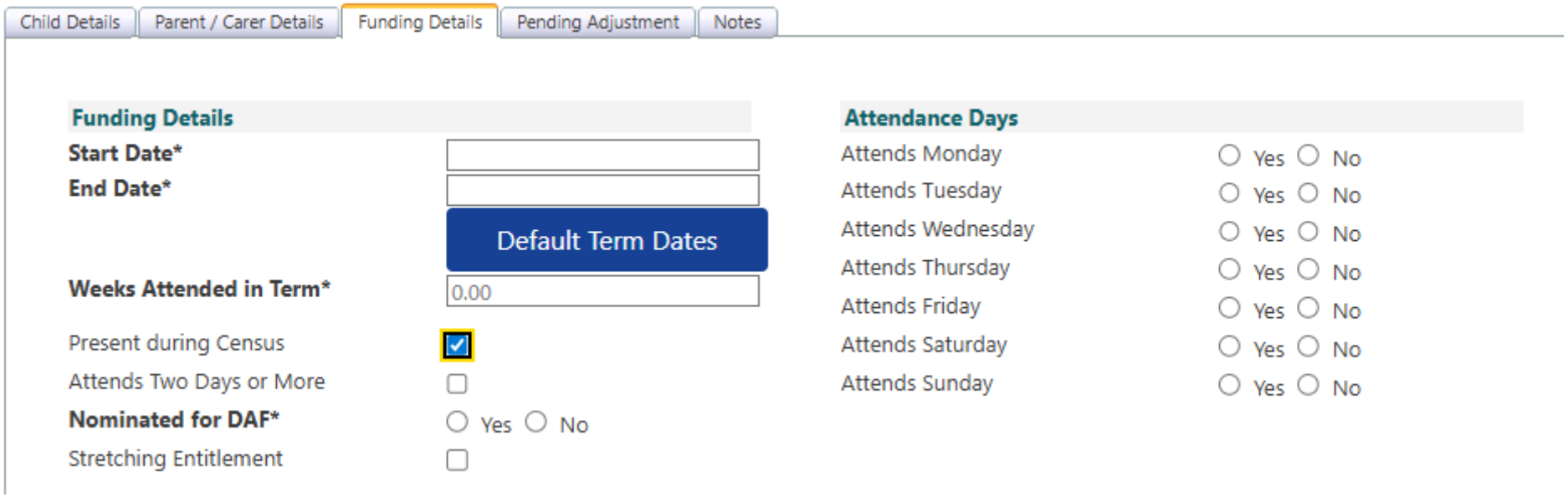
Click on the Default Term dates and when they appear, change the dates, if this is applicable. The start date should be the day that the child started.

DAF is processed outside of Synergy so please record ‘Nominated for DAF’ as ‘No’.



⚠ **Please note:** If the child attends your setting for more than 1 day a week you must tick the ‘Attends Two Days or More’ box otherwise you will only be able to claim a maximum of 10 hours per week

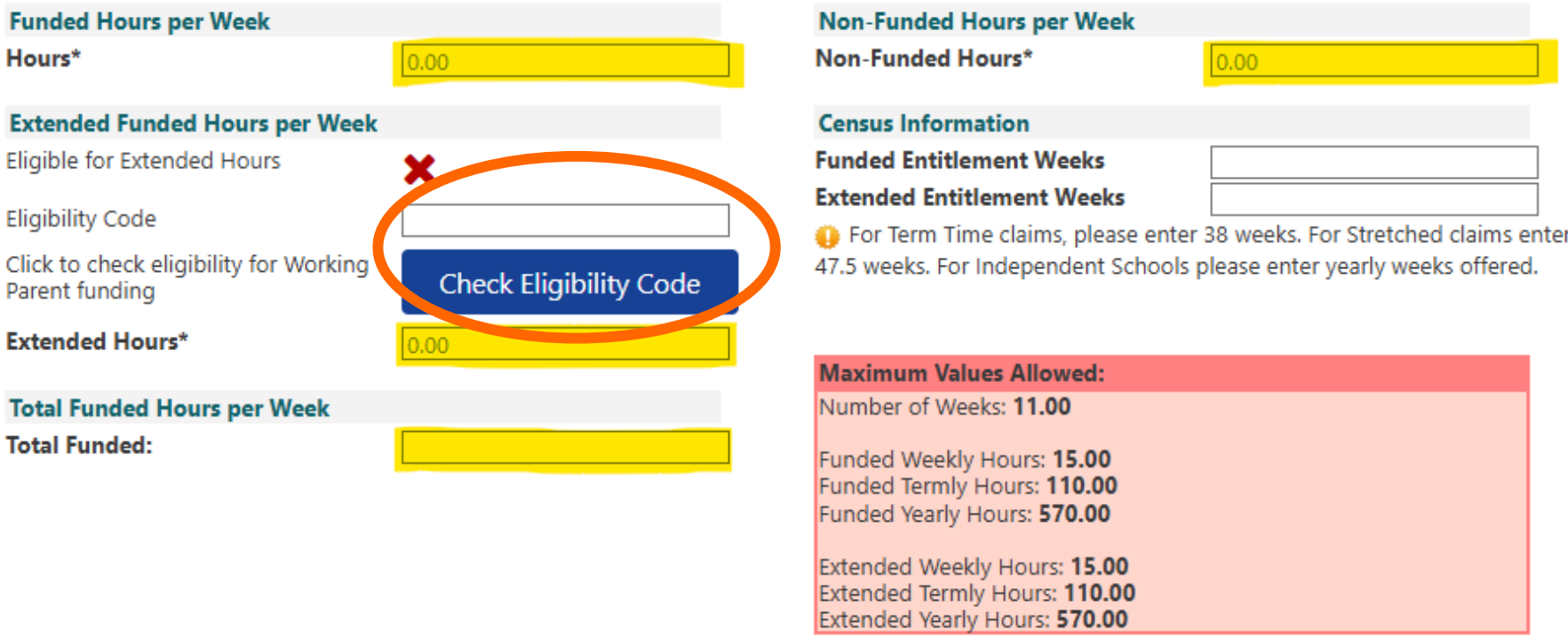
Please complete the days the child attends.



⚠ **Please note:** From Autumn 2026, all funding must be claimed as term time only, over 38 weeks of the year, so the stretched entitlement box should not be ticked. The Kelsi website provides information about term lengths.

Add the eligibility code (if applicable) and press the blue ‘Check Eligibility Code’ button. The result of the code will be shown at the top of the screen.

Complete the funded/extended/expanded entitlement weeks. (38 for term time or 47.5 for stretched funding.)



Please note: Unlike actuals claims, you cannot add hours or weeks on this screen (in the boxes marked yellow here). The termly hours will be input on the ‘Pending Adjustment’ tab.

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, leave the 'extended pending adjustment' boxes blank 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 press the blue 'check eligibility' button again. For All 2 Year Olds, please **do not** enter hours in the funded hours, unless they are eligible for EL2.

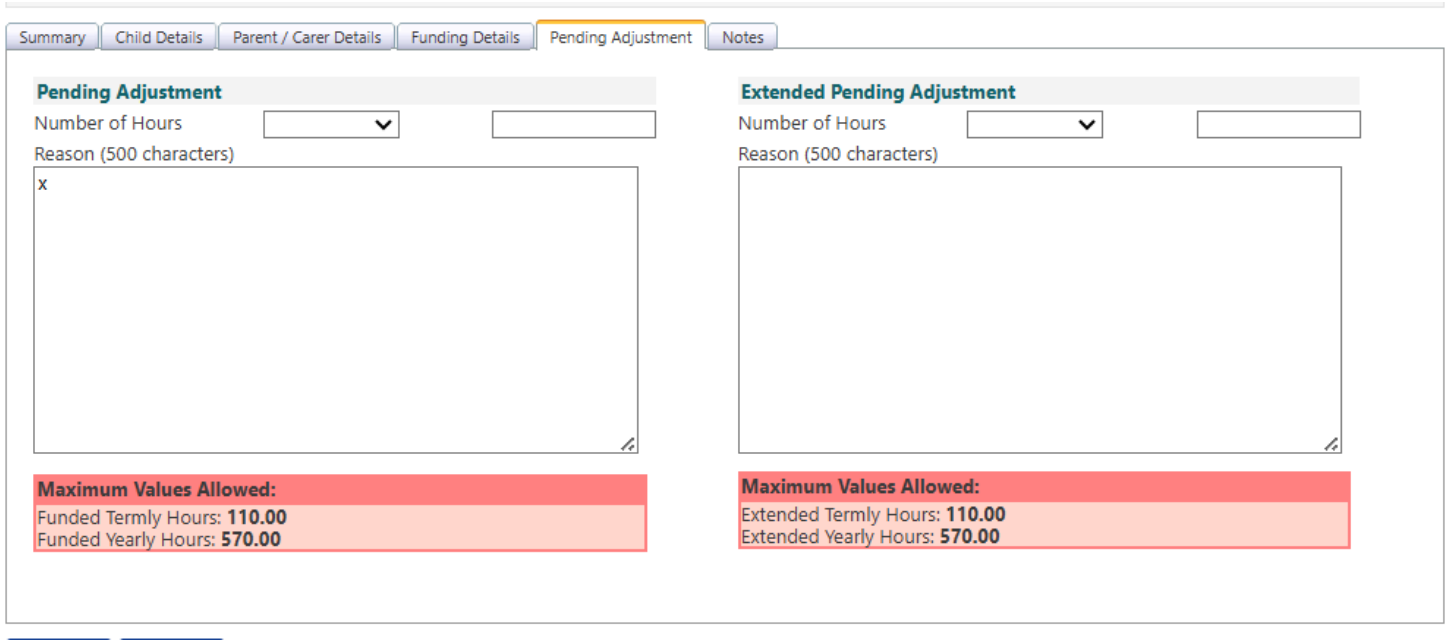
Pending Adjustment tab (with examples)

This screen will have a differing appearance, depending on the entitlement being claimed. For 3 & 4-year-olds, it will show two columns if you offer extended funding. If you do not, only the universal column will appear. It will show two columns for 2-year-olds and only one for the 9 month plus WPE.

The red boxes show the maximum termly hours that can be claimed, *depending on whether the 'Attends Two Days or More' box has been ticked.* Please see the following examples on how to fill this in and complete the claim.

The 'Pending Adjustment' section should be used for Universal 3&4 year old funding and EL2 (FF2) funding.

The 'Extended Pending Adjustment' section is for Working Parent Entitlement Funding, regardless of age group.

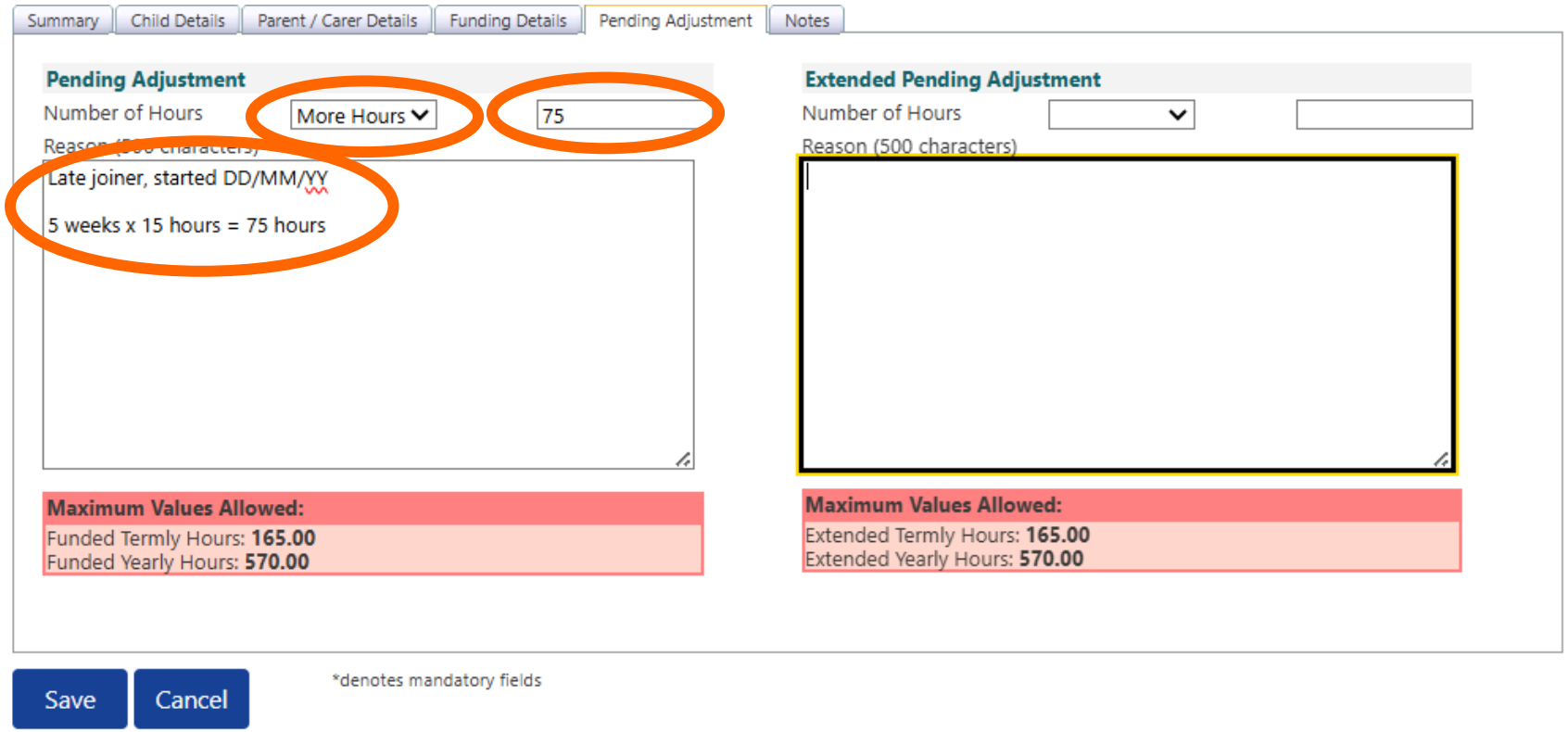


Example 1: Late joiner claiming Universal Hours or EL2 (FF2) only.

A child starts with the provider with 5 complete weeks of term remaining. They will be attending for 15 hours a week.

Select ‘More Hours’ from the drop-down menu by the Pending Adjustment box and enter 75 in the hours box.

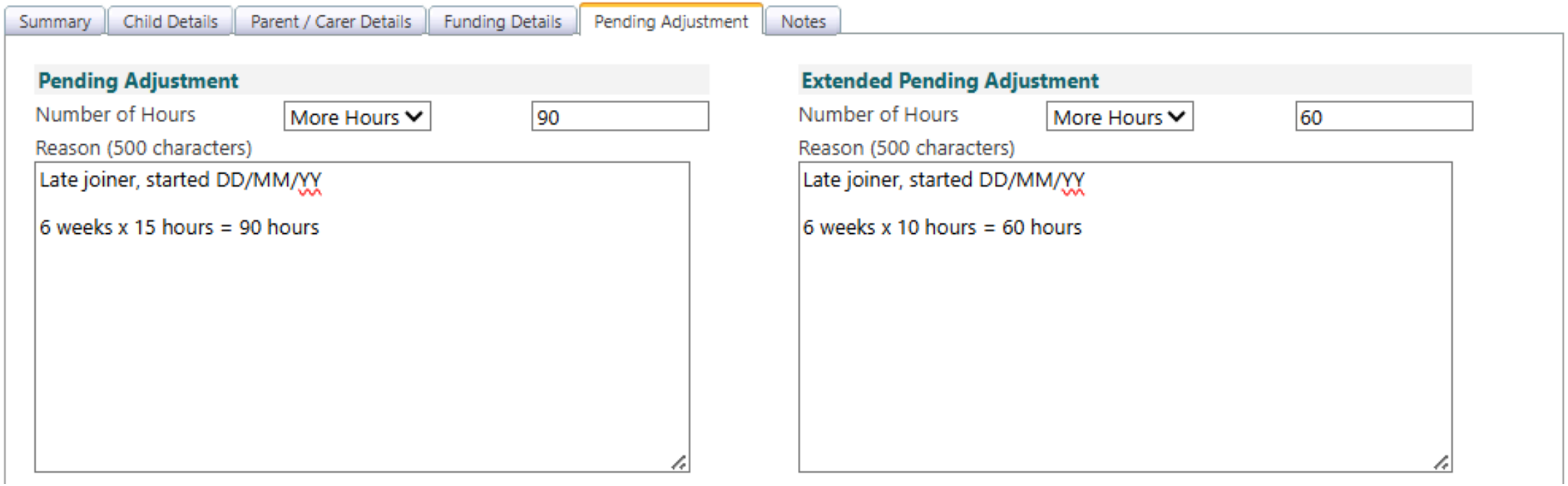
In the Reason box enter the reason for the claim and the date started (shown below as DD/MM/YY). Then show the weekly hours and number of weeks the child is claiming as a number sentence.



Once all the information has been entered click Save. The child will now appear in the list of children.

Example 2: 3 or 4 Year Old Late joiner claiming Universal Hours and Extended Hours.

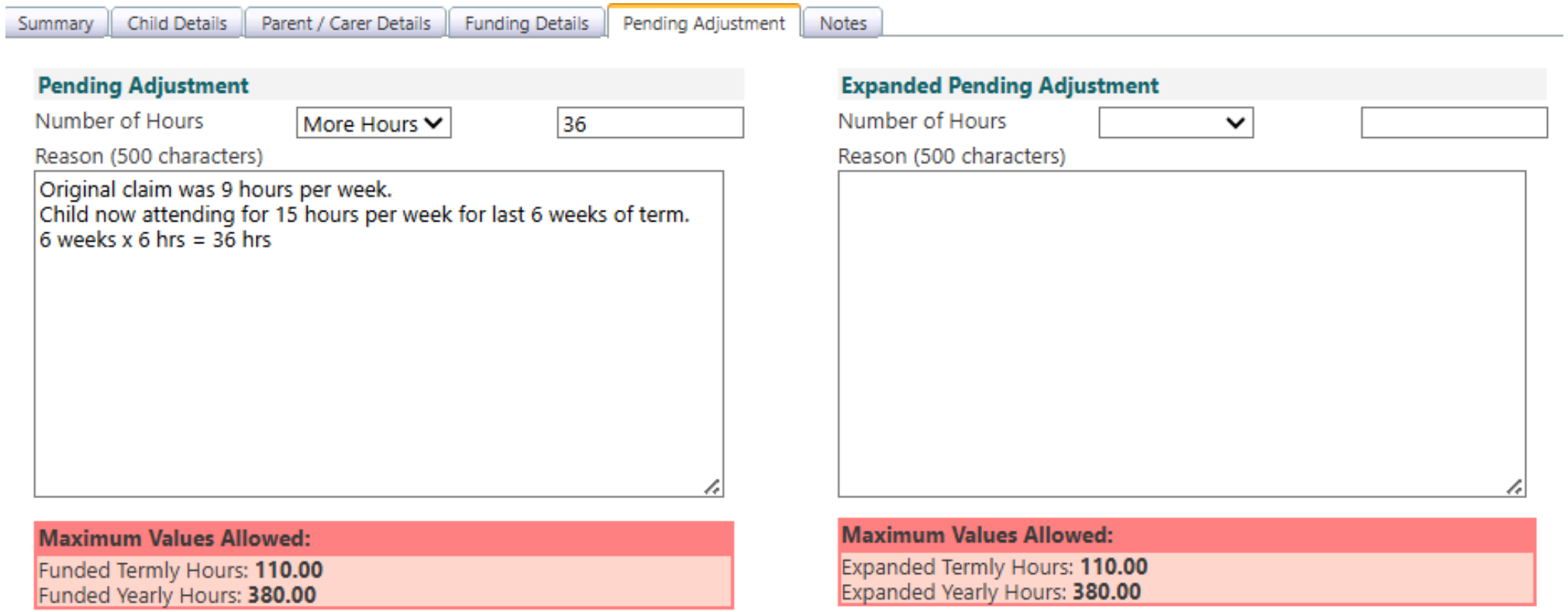
A child starts at the setting with 6 complete weeks of term remaining and is claiming 15 hours of universal funding and 10 hours of extended (working parent) funding per week. The funding must be split depending on the type.



Please note: The claim will not save with extended hours unless the child was found to be eligible for the Working Parent Entitlement when the code was checked on the 'Funding Details' tab.

Example 3: 2 year old claiming EL2 (FF2) increasing their hours during the term

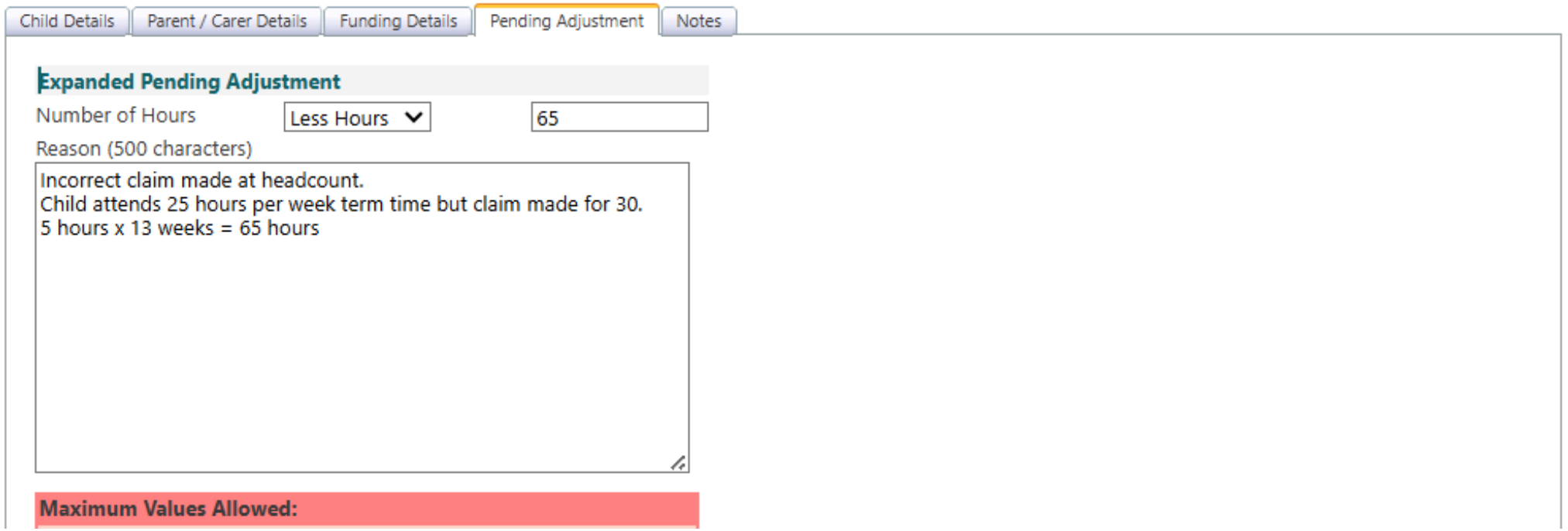
A child starts at the setting for 9 hours a week. The child is increasing their hours to 15 hours per week for the last 6 weeks of term.



⚠ **Please note:** Only EL2 (FF2) claims can be increased during the term. Claims for other entitlements cannot be increased after headcount.

Example 4: 9 Months + Working Entitlement incorrect headcount claim

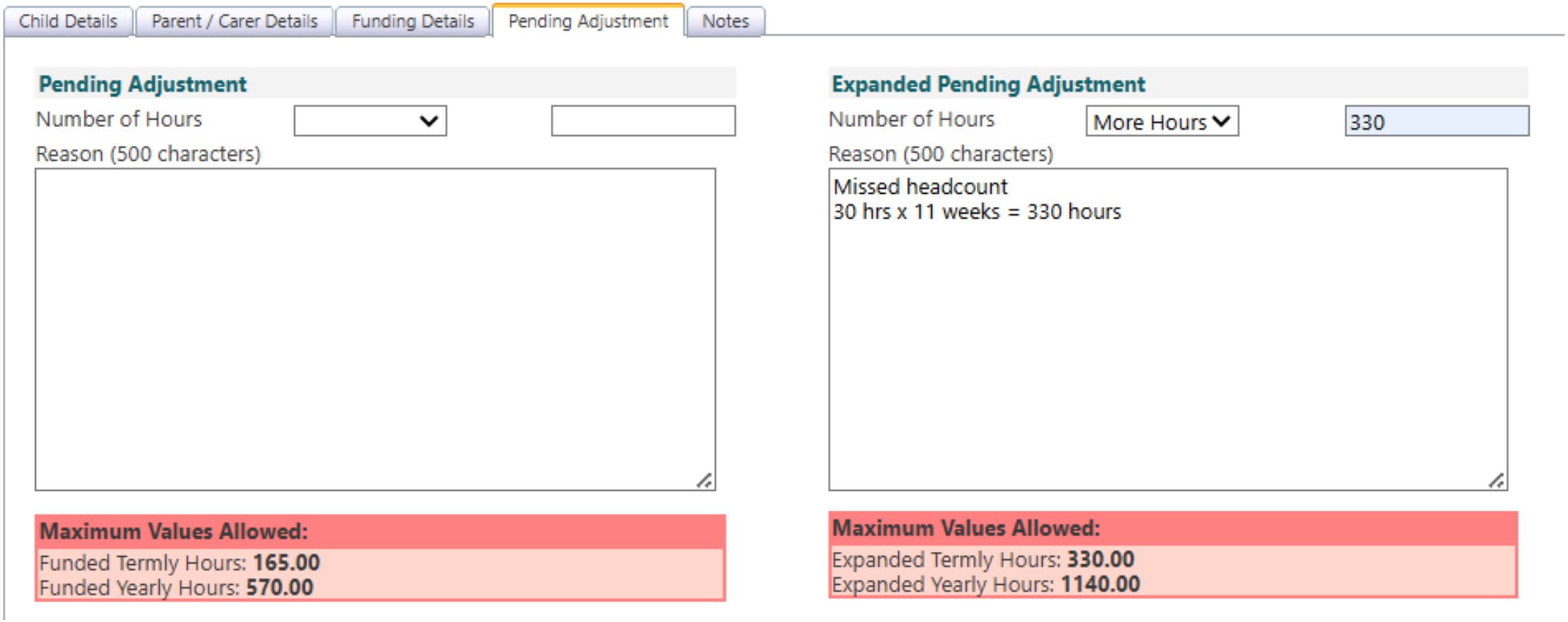
A claim was made in error for 30 hours per week in the Summer term but the child only attends for 25 hours per week. 65 hours of funding to be returned so ‘Less Hours’ is selected.



Please note: Only the ‘Expanded Pending Adjustment’ section is available for the 9 Months + Working Entitlement as there is no other type of funding for this age range.

Example 5: Missed headcount claim for 2 year old with Working Parent Entitlement

The child attends for 30 hours per week but was missed from the headcount in the Spring term. No hours are entered into the 'Pending Adjustment' section as no EL2 (FF2) hours are being claimed.



Checking the claims before submitting

Each time a child is saved, it takes you back to the adjustments screen and shows a list of all the children and your amendments.

The Funded Hours you have entered and the Total Funding Amount for Term are now displayed. Check that these adjusted hours have now been input correctly.

The status descriptions will show “Unsubmitted Claim” meaning the claim has been amended but not submitted or “New, Unsubmitted Child” meaning the claim has been created but not submitted.

		Status	Child	Pending Adj Hours	Pending Extended Adj Hours	Funded Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
!	↩	New, Unsubmitted Child	X, X (01-Jan-2022)	100.00	0.00	100.00	0.00	£698.00	

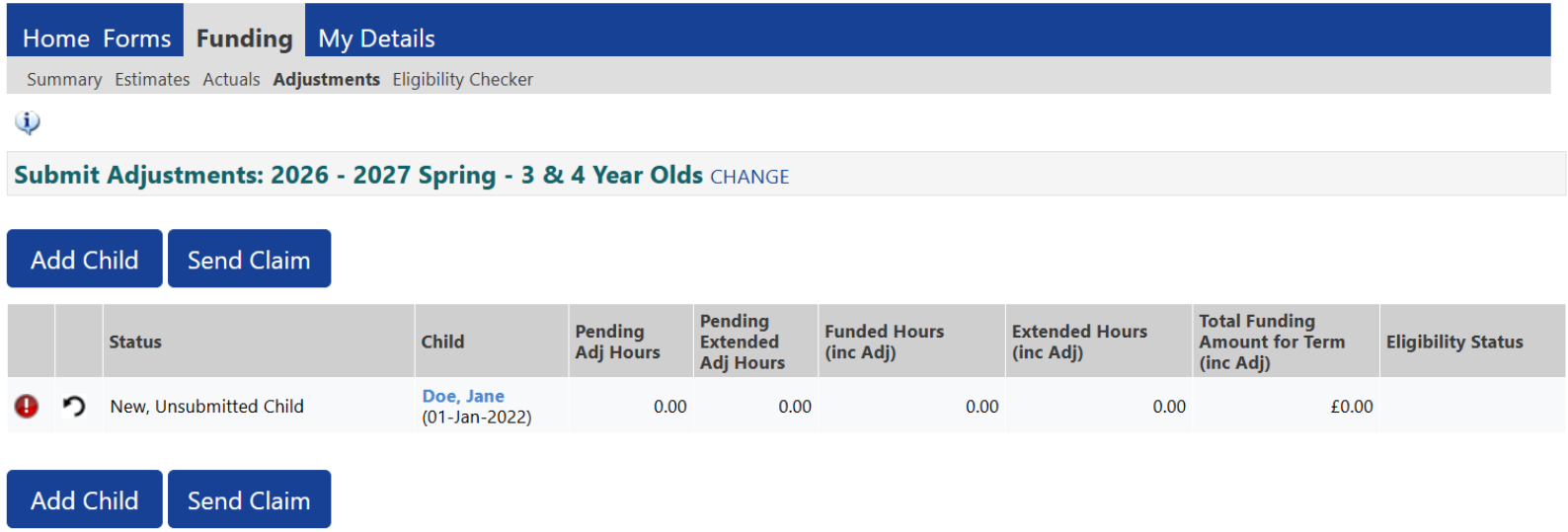
Add Child Send Claim

Sending the claim

Click on either of the ‘Send Claim’ buttons to submit the funding requests.

You must click on the ‘Send Claim’ button in order for the Early Years Management Information team to receive your submission.

If the status still reads “Unsubmitted Claim” or “New, Unsubmitted Child” then the claim has not been sent.

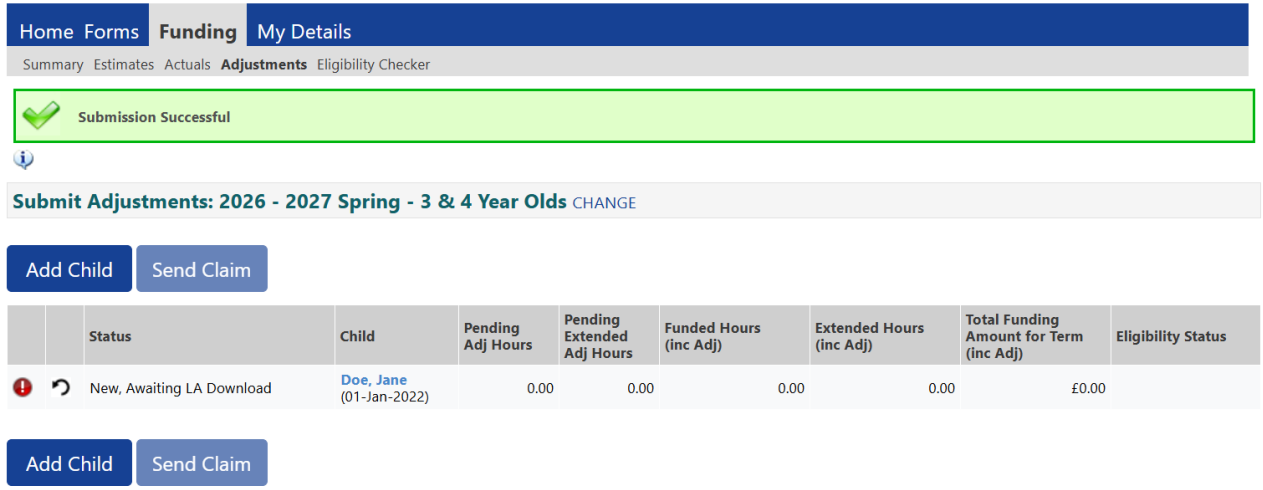


⚠ **Please note:** The ‘Send Claim’ button will only send claims for the entitlement currently being viewed. You must repeat the action to send each entitlement separately.

What to check once claim has been sent

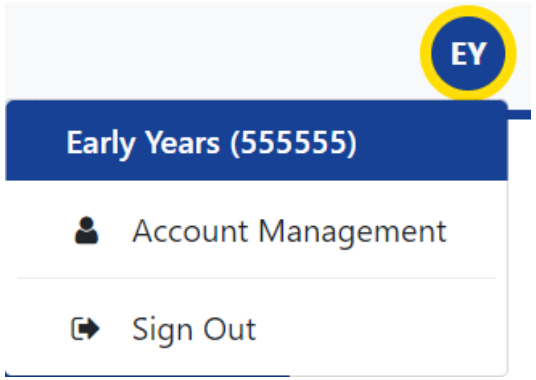
Once you have pressed the “Send Claim” button and the claim is submitted, a green bar with a tick and the words “Submission Successful” appear on the screen, as per below.

The status of the children now changes to ”Awaiting LA Download”. This status may change, or no longer show, as the Early Years Management Information team process your claim.



Please take a screenshot of this screen, showing the date and time, including the green ‘Submission Successful’ message, the term and type of funding you are in and the “Awaiting LA Download” status against the individual children. Without this evidence, we will not be able to verify if you have had problems with your submission, if it is subsequently not received by the Early Years Management Information Team.

Signing Out



In the top right-hand corner, you will see a button with ‘EY’.

If you click on the button, it will give you two options:
- ‘Account Management’ if you wish to change the password;
- ‘Sign Out’.

Click Sign Out to exit the portal.

Frequently Asked Questions

1.The link on KELSI does not work
2. I have entered my password incorrectly a number of times and my account is locked
3. My password has expired
4. I have logged into the Portal and do not have the usual screen – how do I get to the funding page?
5. I am logging on to Synergy and receive the ‘Oooops! Sorry, you do not have access to this’ message.
6. The 'Home Screen' is displaying a notification advising that there are unsubmitted child funding records.
7. I have changed the entitlements I offer
8 .The 'Adjustments' Tab is displaying a message asking me to email the Authority to request changes to the 'Adjustments’
9. I have clicked on the Default Term Dates button, but the dates that have been populated are different to the term dates for my setting
10. How do I check if a working parent entitlement code is valid?
11. A child now has an amber exclamation mark beside their record saying they are in their grace period.
12. Children’s records are not saving
13. I have a status description next to a child’s record. What does it mean?

1.The link on KELSI does not work

This may be due to the way your permissions are set up in your current internet search engine. Please try a different search engine i.e. as an alternative try using Firefox, Internet Explorer, Google or Google Chrome**.**

2. I have entered my password incorrectly a number of times and my account is locked. Please contact miearlyyears@kent.gov.uk to have your account unlocked and your password reset.

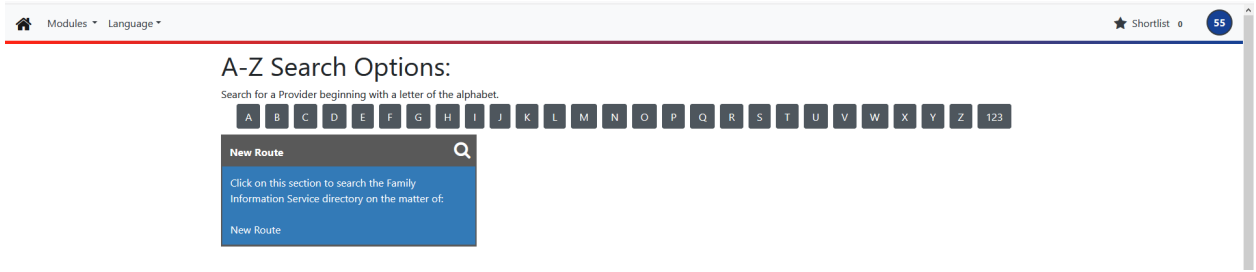
3. My password has expired.

Passwords need to be reset every 42 days.

Please follow the instructions on the Synergy FIS Provider Portal to reset the password.

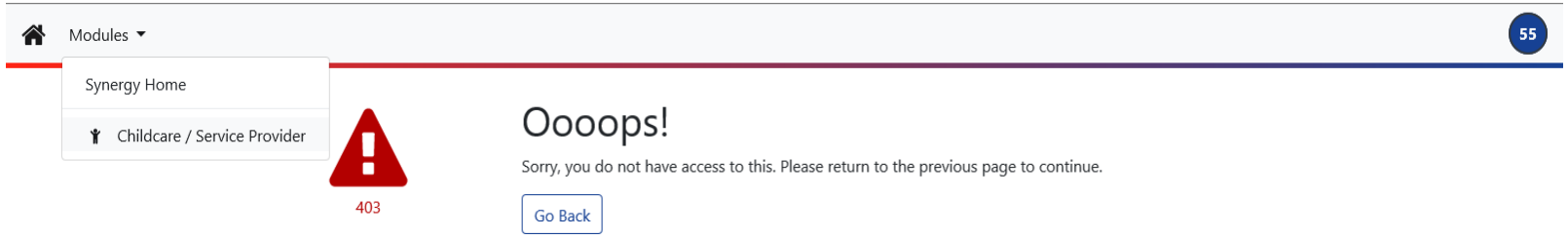
4. I have logged into the Portal and do not have the usual screen – how do I get to the funding page?

If you are seeing the screen below, please click on ‘Modules’ and then select ‘Childcare/Service Provider’



5. I am logging on to Synergy and receive the ‘Oooops! Sorry, you do not have access to this’ message.

This is a known issue on Synergy; to return to the funding page please click on the ‘modules’ and then ‘Childcare/Service Provider’. This should return you to the funding page.



6. The 'Home Screen' is displaying a notification advising that there are unsubmitted child funding records.

Click on the message to display a sub-message with details of the funding term that has the unsubmitted record/s. Click on the sub-message to be taken to the funding term. Click ‘Send Claim’ to submit any pending claims.



7. I have changed the entitlements I offer.

If the entitlements that you offer change, the Early Years Management Information Team will need to amend your details in the Synergy system to reflect these changes. Please, therefore, advise us of any such amendments by emailing miearlyyears@kent.gov.uk

8 .The 'Adjustments' Tab is displaying a message asking me to email the Authority to request changes to the 'Adjustments'.

This message is displayed when the submission dates for 'Estimates' or 'Actuals' are active and adjustment claims cannot be processed. Management Information will email all providers when adjustment claims can be entered.

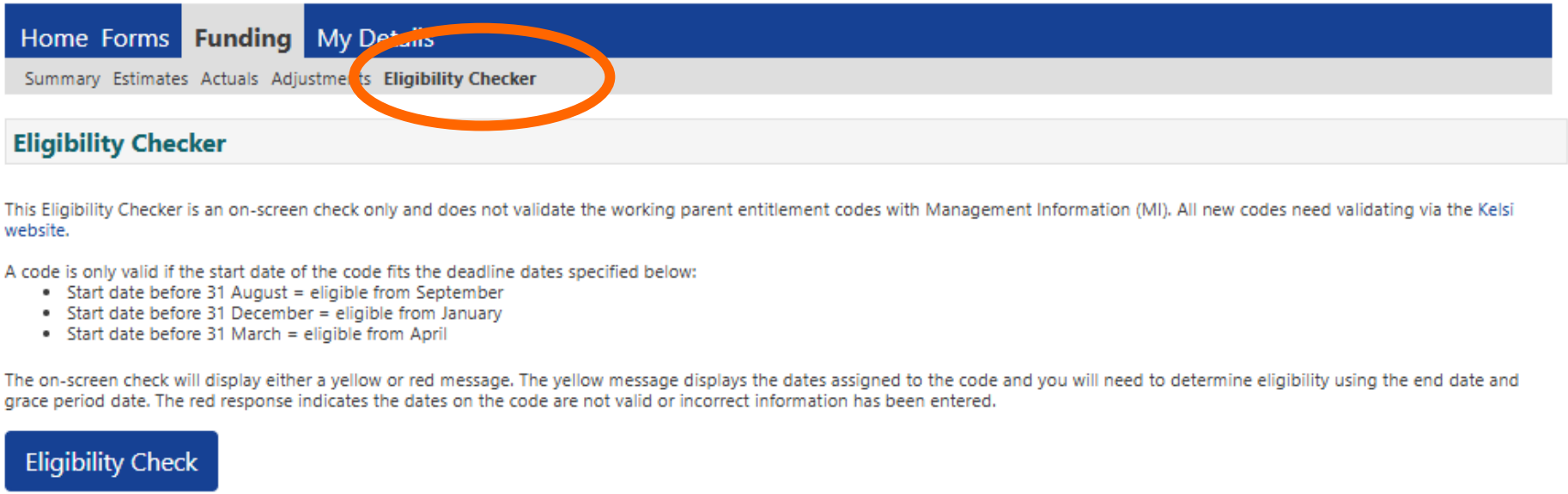
9. I have clicked on the Default Term Dates button, but the dates that have been populated are different to the term dates for my setting.

The Start and End dates can be overwritten with the dates for your setting. Please remember that the **Start Date** should be the date that the **Child started in that funding term.** This may be different to the start date of the funding term for your setting.

10. How do I check if a working parent entitlement code is valid?

If it is a new code, i.e. the child has just become eligible for the extended hours, or has transferred to your setting you must validate the code through the Working Parents Eligibility Checker. This can be found here: Working Parent Eligibility Checker

If you would like to check if the parent of a continuing child has reconfirmed their details with HMRC prior to the start of a new term you can use the Eligibility Checker in your portal under the 'Funding' tab. This will give you an onscreen result. You will not receive any email confirmation.



11. I have submitted my headcount/adjustments and have gone back into the Portal and noticed that a child now has an amber exclamation mark beside their record saying they are in their grace period. This did not show when I submitted the claim – will I still get my funding?

Yes, you will receive the funding. The eligibility check is completed when you press the blue 'Check Eligibility' button when you submit your claim. The record is then populated with the dates assigned to the eligibility code at that moment in time and the child may not be in the grace period. If, later in the term, you log into your portal the working parent entitlement eligibility check is not automatically updated and the child may now be in their grace period based on the dates assigned at the time of the submission of the claim. The parent may have reconfirmed their details with HMRC, but this will not show until a new claim is submitted and checked.

12. Children's records are not saving

If you are experiencing difficulties saving records for the 3&4-year-old children with working parent entitlement hours, the Early Years Management Information team recommend that you enter the child's details for the just the universal hours and save the record. Then go back into the record, add the working parent entitlement code and the extended hours and click on the blue 'Check Eligibility' button. If there is a problem with a particular child's code and Synergy shows an error message, you will not have to keep re-entering all the child's details. Please contact the Early Years Management Information team if you are experiencing difficulties with a working parent entitlement code.

13. I have a status description next to a child's record. What does it mean?

This table shows all the various status descriptions with their corresponding explanation:

Message	Explanation
Awaiting LA Deletion	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	A NEW child has been entered, but not submitted, please press 'Send Claim'.
New, awaiting LA download	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	An EXISTING child has been amended, but not submitted, please press 'Send Claim'.
Awaiting LA Download	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.
[Blank, no status showing]	The MI team is processing the adjustment.

Contact Details

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Kelsi Website: Free Early Education - KELSI