

Children Young People and Education Directorate

Submitting 2 Year Old Adjustment Claims Via the Synergy FIS Provider Portal

Guidance for Free Early Education Providers



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Introduction to Free Early Education places for 2-year old's

Free early education places for 2-year old's is known in Kent as the Free for 2 or 'FF2' scheme.

We have a duty to provide eligible 2-year old's up to 570 hours of free early education a year over 38 weeks of the year term time or up to 52 weeks stretched funding.

A child is eligible if:

- they come within the criteria used to determine eligibility for Free School Meals
- their families receive Working Tax Credits and have an annual gross income of no more than £16,190 per year
- their families receive Universal Credit and have an annual net income of no more than £15,400
- they have a current statement of Special Educational Needs or an Education, Health and care plan
- they are entitled to Disability Living Allowance
- they are looked after by a local authority
- they are no longer looked after by the local authority as a result of an adoption order, a special guardianship order or a child arrangements order which specifies with whom the child lives.

In July, the government permanently extended eligibility for the free early education entitlement for the most disadvantaged two-year-old children whose parent(s) meet the following conditions:

1. That they are excluded from claiming public funds as a consequence of their immigration status, or their lack of immigration status.

and

2. They are in receipt of support under section 17 of the Children Act 1989.

Eligible children can start claiming after they turn two, depending on when their birthday is.

Child's 2nd birthday	When they can claim from
1 January to 31 March	the beginning of term on or after 1 April
1 April to 31 August	the beginning of term on or after 1 September
1 September to 31 December	the beginning of term on or after 1 January

Introduction

The Synergy Family Information Service (FIS) Provider Portal is used by childcare providers to claim for 2, 3 and 4 year old Early Years funding. The Portal links directly into the Synergy system that the Early Years Management Information team use to process funding payments.

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:

<https://www.kelsi.org.uk/support-for-children-and-young-people/early-years/sufficiency-and-sustainability/free-early-education/free-education-places-for-2-year-olds>

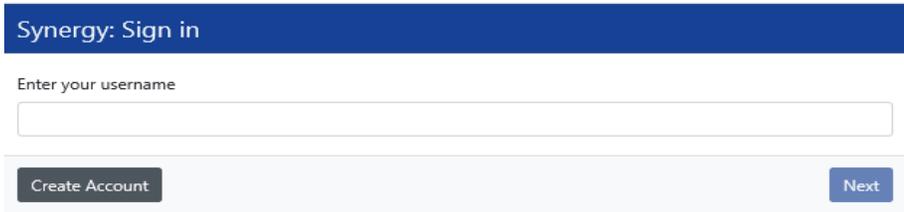
Once this page has loaded, please scroll to the section “How To Submit An FF2 Claim” and use the link to log on.

Logging onto the Provider Portal

When you open the link, please enter your "User Name" as shown below. The "User Name" is the 6-digit DfE URN for your setting.

Please do not use your email address.

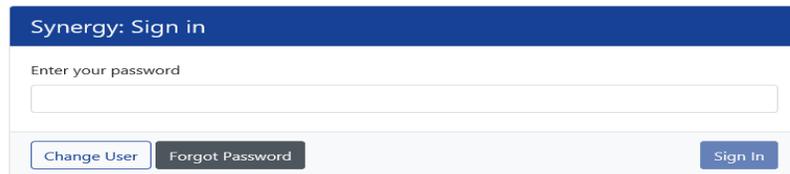
Click on Next.



The screenshot shows the 'Synergy: Sign in' page. At the top, there is a blue header with the text 'Synergy: Sign in'. Below the header, there is a text input field with the placeholder text 'Enter your username'. At the bottom of the form, there are two buttons: 'Create Account' on the left and 'Next' on the right.

Enter your 'Password' as shown below.

Click 'Sign In'.



The screenshot shows the 'Synergy: Sign in' page. At the top, there is a blue header with the text 'Synergy: Sign in'. Below the header, there is a text input field with the placeholder text 'Enter your password'. At the bottom of the form, there are three buttons: 'Change User' on the left, 'Forgot Password' in the middle, and 'Sign In' on the right.

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.

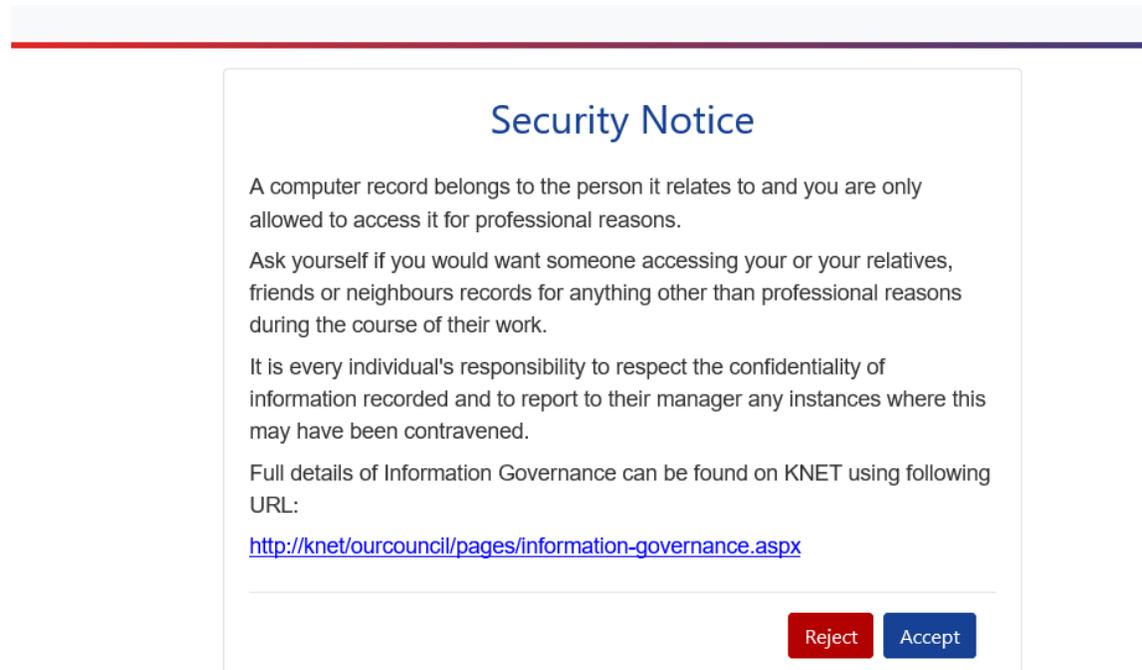
If you have locked your 'password', please telephone or email the Early Years Management Information team on 03000 421612 or miearlyyears@kent.gov.uk and we will reset this for you.

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.**

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:



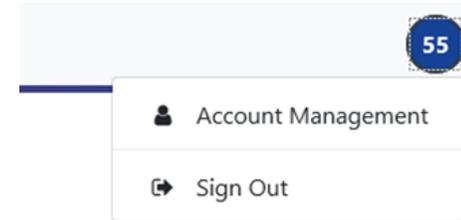
Please click on “Accept”. A message will appear saying “redirecting you”. This will take a few seconds and then the 'Home Screen' will be displayed. If you accidentally click on “Reject”, it will sign you out and you will need to log in again.

Home Screen

Once you have logged in, the 'Home Screen' will be displayed. In the top right-hand corner, you will see a button with "55".

If you click on the button, it will give you two options:

- "Account Management" if you wish to change the password;
- "Sign Out".



Home Forms Funding

Welcome to KCC's Provider Portal to claim 2, 3 and 4 Year Old Early Education Funding.

Please select the Funding tab to proceed with your claim.

Guidance documentation for submitting a funding claim can be found [here](#)

You will now see three tabs; 'Home', 'Forms' and 'Funding'. **"Forms" is a new tab, but please ignore this for submitting 2 year old claims.**

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

Funding Deadlines

The FF2 payment schedule, which can be found on KELSI using the link below, shows all the submission date deadlines for the term.

<https://www.kelsi.org.uk/early-years/sufficiency-and-sustainability/free-early-education/free-education-places-for-2-year-olds>

Claiming Funding

The Funding screen will be displayed which has five tabs at the top of the screen: 'Summary', 'Estimates', 'Actuals', 'Adjustments' and 'Eligibility Checker'.

Please be aware that the 'Estimates' and "Eligibility Checker" tabs are not used for submitting 2 year old claims.

		Office use only	
		Ready To Process	Processed
	Funding Type		
	2 Year Olds		
	3 & 4 Year Olds		

Opening 2 Year Olds Adjustments (to submit new starters & continuing claims)

If you are submitting **after** the first payment run deadline, you should be submitting "Adjustments" claims.

- Select the relevant term (1)
- Select 2 Year Olds Funding (2)
- Select the **Adjustments** Tab (3)

Submitting an Adjustment

A FF2 adjustment should be submitted in the following scenarios:

1. To **amend** a child's hours by increasing or decreasing the hours for a child you have already claimed for within the current term.
2. To **add** a child, if the child was not submitted on the Portal using the Actuals tab, before the first submission deadline of the term.
3. To **add** a child, if a child has started at your setting after the first submission deadline of the term.

The maximum weeks for each term are as follows:

38 Week Offer		48 Week Stretched Offer	
Autumn Term	14 Weeks	AutumnTerm	16 Weeks
Spring Term	11 Weeks	Spring Term	14 Weeks
Summer Term	13 Weeks	Summer Term	18 Weeks

A list of children you submitted as 'Actuals' will appear that you can now amend, if applicable and the “Add child” button is shown if you need to add new children.

Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds [CHANGE](#)

[Add Child](#) [Send Claim](#)

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
	X		Speed, Lucy (05-May-2018)	0.00	132.00	£673.20
	X		White, Max (30-Aug-2018)	0.00	165.00	£841.50
	X		Wood, Alan (15-Jun-2018)	0.00	88.00	£448.80

[Add Child](#) [Send Claim](#)

Amending a Child's Hours

To amend the details of a child submitted as an Actual, click on the child's name.

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.

Click on the 'Child Details' tab if you need to amend any personal details.

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details Funding Details Pending Adjustment Notes

Child Details

Forename* Penny

Middle Name

Surname* Lane

DOB* 02-Feb-2018

Proof of DOB

Gender* Male Female

Preferred Surname

Ethnicity* Black - Nigerian

SEN COP Stage <Unknown>

Address

Address Line 1* 123 Beatles Lane

Address Line 2

Address Line 3

Locality

Town Maidstone

County

Postcode* ME14 9JD

Save Cancel *denotes mandatory fields

Select the **Child Details Tab** and check that the information shown is still correct. Please make sure all mandatory fields marked by an asterisk (*) are still completed, as you amend any details.

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. See page on "Notes".**

Please do not make any changes to the "SEN COP Stage" box shown below. This information is determined by KCC's SEN Team and they will alter it if needed.

The screenshot shows the 'Funding' section of the FIS Provider Portal. The 'Child Details' tab is active, displaying a form with two main sections: 'Child Details' and 'Address'.

Child Details Section:

- Forename***: Penny
- Middle Name**: (empty)
- Surname***: Lane
- DOB***: 02-Feb-2018
- Proof of DOB**:
- Gender***: Male Female
- Preferred Surname**: (empty)
- Ethnicity***: Black - Nigerian
- SEN COP Stage**: <Unknown>

Address Section:

- Address Line 1***: 123 Beatles Lane
- Address Line 2**: (empty)
- Address Line 3**: (empty)
- Locality**: (empty)
- Town**: Maidstone
- County**: (empty)
- Postcode***: ME14 9JD

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a note: '*denotes mandatory fields'.

Select the **Parent/Carer Details Tab** and check that the information shown is still correct, if information was previously input. Completion of this tab is optional, but you will need to either complete all the fields, or leave it blank.

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details **Parent / Carer Details** Funding Details Pending Adjustment Notes

Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.

Parent / Carer Details		Partner Details	
Forename	<input type="text"/>	Forename	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
DOB	<input type="text"/>	DOB	<input type="text"/>
<input type="checkbox"/> NI or	<input type="checkbox"/> NASS Number	<input type="checkbox"/> NI or	<input type="checkbox"/> NASS Number

*denotes mandatory fields

Click on the 'Funding Details' tab.

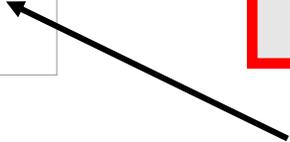
Depending on why you are submitting an adjustment for a child you have already claimed within Actuals, you may need to update the following 5 areas. **If you do not, please move to page 15.**

(1) Click on the Default Term dates and when they appear, change the dates, if this is applicable.

(2) In the **Spring Term only**, please tick the "Present during Census" box. If this is not ticked, we cannot guarantee that a payment will be processed.

(3) If the child attends your setting for more than 1 day a week, or if they also attend another setting, tick the "Attends Two Days or More" box. If a child attends your setting for 1 day only, they may claim a maximum of 10 funded hours a week. **A common error occurs here when providers do not tick this box and an error message appears explaining they cannot claim more than 10 hours a week.**

Please note:
 The Funding Details start and end dates are set for the academic period, as defined by the Department for Education. The start date is the date **the Child started** in that term. This may not be the first day of term, **Please be aware that if an inputting error is made, the term dates will return to the default, so please ensure these dates are correct before submitting your information.**



The red box shows the maximum hours that can be claimed each week and the maximum termly hours.

(4) If the child is accessing their funding over the 48-weeks pattern, tick the “Stretching Entitlement” box.

For any children stretching the funding, where you are claiming as a 48-week pattern, the Stretching Entitlement box will show.

If you cannot see this box, please contact the Early Years Management Information team and we will update Synergy for you.

(5) Please complete the days the child attends.

Funding Details

Start Date*

End Date*

Weeks Attended in Term*

Present during Census

Attends Two Days or More

Stretching Entitlement

Attendance Days

Attends Monday Yes No

Attends Tuesday Yes No

Attends Wednesday Yes No

Attends Thursday Yes No

Attends Friday Yes No

Attends Saturday Yes No

Attends Sunday Yes No

Universal Funded Hours per Week

Universal Hours*

Non-Funded Hours per Week

Non-Funded Hours*

! if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer

Maximum Values Allowed:

Number of Weeks:	11.00
Universal Weekly Hours:	15
Universal Termly Hours:	165
Universal Yearly Hours:	570

*denotes mandatory fields

5

4

Please note that once steps 1 - 5 are complete, these are the only data fields that can be amended in the ‘Funding Details’ tab. Adding in the weeks to the “Weeks Attended in Term” and the hours to the “Universal Funded Hours Per Week” fields are not able to be input on this tab.

Please now move to the ‘Pending Adjustment’ tab.

Click on the **'Pending Adjustments'** tab.

This will show the maximum termly hours that can be claimed in the red box at the bottom.

To amend the hours or weeks being claimed, you need to complete the 'Number of Hours' fields by clicking on the drop down field and choosing an option of "More or Less Hours" and typing in the second box the **total number of hours for the term** that the child's record is to be adjusted by.

Example 1: A child's weekly hours have now increased.

- A child is increasing their hours by 3 hours a week for the remaining 8 weeks of the term (= total 24 hours).
- Select **'More Hours'** from the drop-down menu and type 24 in the second box.
- In the Reason box:
 - enter the reason for the adjustment;
 - the date the hours changed from;
 - how the hours entered have been calculated i.e. ? hours x ? weeks = ? Hours.
- Once all the information has been entered, click on **'Save'**.

Please note that if a parent wants to gradually increase their child's hours over the term as they settle in, more than one adjustment for that child can be submitted in the term, if their hours slowly increase over the term.

The screenshot shows the 'Universal Pending Adjustment' form in the FIS Provider Portal. The form is titled 'Universal Pending Adjustment' and has tabs for 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Pending Adjustment', and 'Notes'. The 'Pending Adjustment' tab is active. It contains a 'Number of Hours' section with a dropdown menu set to 'More Hours' and a text box containing '24'. Below this is a 'Reason (500 characters)' text area containing the text: 'Child increased their hours from 9 to 12 for 8 weeks from 25/01/2021 3 hours x 8 weeks = 24 hours'. At the bottom, a red box highlights 'Maximum Values Allowed: Universal Termly Hours: 110, Universal Yearly Hours: 380'. There are 'Save' and 'Cancel' buttons at the bottom left, and a note '*denotes mandatory fields' at the bottom right.

Example 2: A child's weekly hours have now decreased.

- A child is reducing their hours by 5 hours a week for the remaining 6 weeks of the term (= total 30 hours).
- Select '**Less Hours**' from the drop-down menu and type 30 in the second box.
- In the Reason box:
 - enter the reason for the adjustment;
 - how the hours entered have been calculated i.e. ? hours x ? weeks = ? Hours.

Once all the information has been entered, click on '**Save**'.

The screenshot shows the 'Funding' section of the FIS Provider Portal. The 'Adjustments' tab is active. The 'Universal Pending Adjustment' form is displayed with the following details:

- Number of Hours:** Less Hours (dropdown), 30 (input field)
- Reason (500 characters):** Child has reduced their hours from 15 to 10 for the last 6 weeks of term
5 hours x 6 weeks = 30 hours
- Maximum Values Allowed:** Universal Termly Hours: 110, Universal Yearly Hours: 380
- Buttons:** Save, Cancel
- Note:** *denotes mandatory fields

Example 3: An error was made in the original claim for the amount of weeks.

- An original claim was made for 9 weeks and should have been for 10 weeks and the child is attending for 15 hours a week.
- Select '**More Hours**' from the drop-down menu and type 15 in the second box.

In the Reason box:

- enter the reason for the adjustment;
- how the hours entered have been calculated i.e. ? hours x ? weeks = ? Hours.

- Once all the information has been entered, click on '**Save**'.

The screenshot shows the 'Universal Pending Adjustment' form in the FIS Provider Portal. The form is titled 'Universal Pending Adjustment' and has a 'Number of Hours' field with a dropdown menu set to 'More Hours' and a value of 15. The 'Reason (500 characters)' text area contains the text: 'Claim made for 9 weeks. It should have been for 10 weeks. 15 hours x 1 week = 15 hours'. Below the text area is a red box with the text: 'Maximum Values Allowed: Universal Termly Hours: 110, Universal Yearly Hours: 380'. At the bottom are 'Save' and 'Cancel' buttons, and a note '*denotes mandatory fields'.

There is now a new tab called 'Notes'. This is optional.

Please use this tab if you wish to add **any notes about the child** i.e. they have now changed their name by deed poll, or the original record had an incorrect dob, address etc.

The screenshot shows the 'Notes' tab in the FIS Provider Portal. The top navigation bar includes 'Home Forms' and 'Funding'. Below this, a secondary bar contains 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main content area has tabs for 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Pending Adjustment', and 'Notes'. The 'Notes' tab is active, showing two sections: 'Add a new note' with a large empty text box, and 'Notes History' which is currently empty. At the bottom, there are 'Save' and 'Cancel' buttons, and a small asterisk note: '*denotes mandatory fields'.

Checking the claims before submitting

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

The Pending Universal Adj Hours you have entered, the Funded Hours (inc Adj) and the Total Funding Amount for Term (inc Adj) are now displayed.

Check that these adjusted hours have now been input correctly.

The status description will now show “Unsubmitted Claim” meaning a new child has been added, **but not** submitted.

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker



3 & 4 Year Olds – Universal and Extended Entitlement Adjustments After headcount has closed please inform MI of the type of adjustment you are submitting using the list below: • Incorrect headcount claim - incorrect hours submitted • Child left off headcount - child in attendance during headcount but missed off claim • Late joiner - a child starting after headcount week who has not claimed FEE funding in the current term • Appeal - changes to a child’s FEE funding (this will be looked at on a case by case basis and cannot be guaranteed)
2 Year Old Funding (FF2) There can be only one *Actuals* submission on Synergy per term. • Any new claims submitted after the first payment cut-off date need to be submitted as an adjustment and will be paid in accordance with the (FF2) Provider Payment Schedule • If you wish to increase a child’s hours, please submit an adjustment but inform MI in the reason box that it is Extra Hours for an existing child

Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds CHANGE

Add Child

Enter EY Voucher

Send Claim

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
!	↺	Unsubmitted Claim	Speed, Lucy (05-May-2018)	21.00	153.00	£780.30
!	↺	Unsubmitted Claim	White, Max (30-Aug-2018)	-33.00	132.00	£673.20
!	↺	Unsubmitted Claim	Wood, Alan (15-Jun-2018)	8.00	96.00	£489.60

Add Child

Enter EY Voucher

Send Claim

Sending the claim

Click on the 'Send Claim' button as shown below 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 you see the status "Unsubmitted Claim", as shown below, this means you still need to click on "Send Claim".

Home
Forms
Funding

Summary
Estimates
Actuals
Adjustments
Eligibility Checker

3 & 4 Year Olds – Universal and Extended Entitlement Adjustments After headcount has closed please inform MI of the type of adjustment you are submitting using the list below: • Incorrect headcount claim - incorrect hours submitted • Child left off headcount - child in attendance during headcount but missed off claim • Late joiner - a child starting after headcount week who has not claimed FEE funding in the current term • Appeal - changes to a child's FEE funding (this will be looked at on a case by case basis and cannot be guaranteed)

2 Year Old Funding (FF2) There can be only one *Actuals* submission on Synergy per term. • Any new claims submitted after the first payment cut-off date need to be submitted as an adjustment and will be paid in accordance with the (FF2) Provider Payment Schedule • If you wish to increase a child's hours, please submit an adjustment but inform MI in the reason box that it is Extra Hours for an existing child

Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds [CHANGE](#)

Add Child
Enter EY Voucher
Send Claim

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
!	↻	Unsubmitted Claim	Speed, Lucy (05-May-2018)	21.00	153.00	£780.30
!	↻	Unsubmitted Claim	White, Max (30-Aug-2018)	-33.00	132.00	£673.20
!	↻	Unsubmitted Claim	Wood, Alan (15-Jun-2018)	8.00	96.00	£489.60

Add Child
Enter EY Voucher
Send Claim

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” (or “Awaiting LA Deletion”, if you have deleted them). This status may change, or no longer show, as the Early Years Management Information team process your claim.

The screenshot shows the 'Funding' section of the FIS Provider Portal. At the top, there is a navigation bar with 'Home', 'Forms', and 'Funding'. Below this, a green bar with a checkmark and the text 'Submission Successful' is visible. A blue box contains a message: '3 & 4 Year Olds – Universal and Extended Entitlement Adjustments After headcount has changed, please inform MI of the type of adjustment you are submitting using the list below: • Incorrect headcount claim - incorrect hours submitted • Child left off headcount - child in attendance during headcount but missed off claim • Late joiner - a child starting after headcount week who has not claimed FEE funding in the current term • Appeal - changes to a child's hours (this will be looked at on a case by case basis and cannot be guaranteed) 2 Year Old Funding (FF2) There can be only one Actuals submission on Synergy per term. • Any new claims submitted after the first payment cut-off date need to be submitted as an adjustment and will be paid in accordance with the (FF2) Provider Payment Schedule • If you wish to increase a child's hours, please submit an adjustment but inform MI in the reason box that it is Extra Hours for an existing child'. Below this, there is a button 'Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds CHANGE'. At the bottom, there are buttons 'Add Child', 'Enter EY Voucher', and 'Send Claim'. A table shows the status of children:

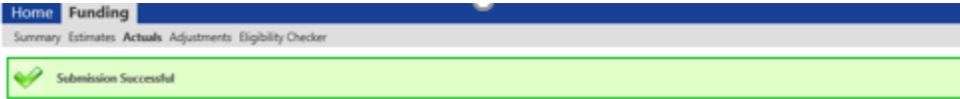
		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
!	↻	Awaiting LA Download	Speed, Lucy (05-May-2018)	21.00	153.00	£780.30
!	↻	Awaiting LA Download	White, Max (30-Aug-2018)	-33.00	132.00	£673.20
!	↻	Awaiting LA Download	Wood, Alan (15-Jun-2018)	8.00	96.00	£489.60

At the bottom of the table, there are buttons 'Add Child', 'Enter EY Voucher', and 'Send Claim'.

ALERT:

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.

Incorrect Submissions **** IMPORTANT****



Once you press “Send Claim” you then receive this green “Submission Successful” bar.

However, if the status next to your records shows ‘Unsubmitted Claim’, it means the claim has not been submitted correctly, due to a technical error.

The status should say ‘Awaiting LA download’ (as per the previous page), once it has actually been submitted.

If this happens to you, please e-mail miearlyears@kent.gov.uk with all your setting’s details and a screen shot of this page to show the error, so the team can investigate.

If you have any new children to add as an adjustment, please proceed to the next page to start inputting them.

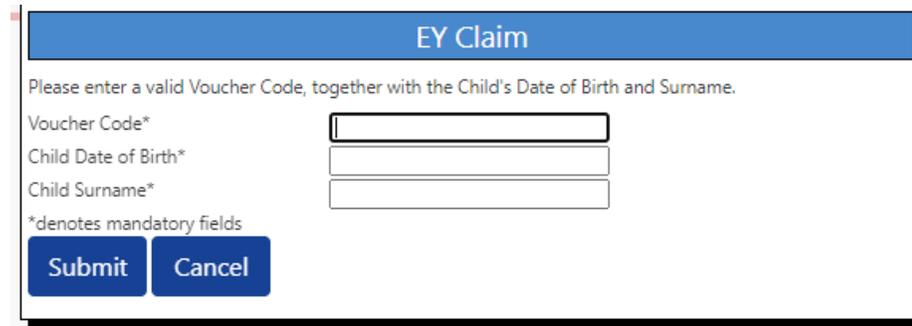
If you do not have any new children to add, please move to page 39.

Adding New Starters – Enter EY Voucher

Providers are encouraged to ask all parents of 2 year olds whether they meet the FF2 criteria and **must** ensure the online application form is completed accordingly.

- Providers **must** obtain an EY Voucher code from the parent before accepting a child under the terms of the FF2 scheme. Payment cannot be backdated if eligibility has not been confirmed when applying under the economic criteria.
- The funded hours can only be claimed from the start of the week during which the EY Voucher code was received and after the child has taken up their funded place.

To use the EY Voucher, click on the 'Enter EY Voucher' button, a EY Claim pop-up window will appear with the fields; Voucher code, Child Date of Birth and Child Surname. All fields are mandatory before it will allow you to submit.



EY Claim

Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.

Voucher Code*

Child Date of Birth*

Child Surname*

*denotes mandatory fields

Submit Cancel

The data must match the parent/carer's application to locate the child. If the parent/carer has applied on the same day, you will need to wait for the following day to submit your claim, as the data is not yet been set up on Synergy.

If for any reason, Synergy is not accepting the EY Voucher, please continue to page x to add them as a New Child.

If the EY voucher is successful, this will load the child's details.

If the parental declaration form holds a middle name or an updated address, please update accordingly on this page.

Please ensure you have seen 'Proof of DOB' and this box has been ticked before continuing.

Mandatory fields are marked by an asterisk (*).

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details
Parent / Carer Details
Funding Details
Notes

Child Details

Forename*

Middle Name

Surname*

DOB*

Proof of DOB

Gender* Male Female

Preferred Surname

Ethnicity*

SEN COP Stage

Address

Address Line 1*

Address Line 2

Address Line 3

Locality

Town

County

Postcode*

Save
Cancel

*denotes mandatory fields

Next, click on the '**Parent/Carer Details**' tab.

Completion of this tab is optional, but you will need to either complete all the fields or leave it blank.

The screenshot shows the 'Funding' section of the FIS Provider Portal. The 'Parent / Carer Details' tab is selected. The form contains two columns of input fields: 'Parent / Carer Details' and 'Partner Details'. Each column has fields for Forename, Surname, and DOB, followed by a checkbox for 'NI or NASS Number'. A note states that details are optional but if entered, at least Forename, Surname, and NI or NASS Number must be filled in. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that an asterisk denotes mandatory fields.

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details **Parent / Carer Details** Funding Details Pending Adjustment Notes

Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.

Parent / Carer Details

Forename

Surname

DOB

NI or NASS Number

Partner Details

Forename

Surname

DOB

NI or NASS Number

Save **Cancel** *denotes mandatory fields

Click on the 'Funding Details' tab.

- (1) Click on the Default Term dates and when they appear, change the dates, if this is applicable.
- (2) In the **Spring Term only**, please tick the "Present during Census" box. If this is not ticked, we cannot guarantee that a payment will be processed.
- (3) If the child attends your setting for more than 1 day a week, or if they also attend another setting, tick the "Attends Two Days or More" box. If a child attends your setting for 1 day only, they may claim a maximum of 10 funded hours a week. **A common error occurs here when providers do not tick this box and an error message appears explaining they cannot claim more than 10 hours a week.**

The screenshot shows the 'Funding Details' form in the FIS Provider Portal. The form is divided into several sections:

- Funding Details:** Includes fields for 'Start Date*', 'End Date*', and 'Weeks Attended in Term*' (set to 0.00). A blue button labeled 'Default Term Dates' is positioned next to the 'End Date' field. There are checkboxes for 'Present during Census', 'Attends Two Days or More', and 'Stretching Entitlement'.
- Attendance Days:** A list of days from Monday to Sunday, each with a radio button for 'Yes' or 'No'.
- Universal Funded Hours per Week:** Includes a field for 'Universal Hours*' (set to 0.00).
- Non-Funded Hours per Week:** Includes a field for 'Non-Funded Hours*' (set to 0.00).
- Maximum Values Allowed:** A red-bordered box containing the following information:
 - Number of Weeks: 14.00
 - Universal Weekly Hours: 10
 - Universal Termly Hours: 110
 - Universal Yearly Hours: 380

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a note: '*denotes mandatory fields'.

1
2
3

Please note:

The Funding Details start and end dates are set for the academic period, as defined by the Department for Education. The start date is the date **the Child started** in that term. This may not be the first day of term, **Please be aware that if an inputting error is made, the term dates will return to the default, so please ensure these dates are correct before submitting your information.**

The red box shows the maximum hours that can be claimed each week and the maximum termly hours.

- (4) If the child is accessing their funding over the 48-weeks pattern, tick the “Stretching Entitlement” box.
 For any children stretching the funding, where you are claiming as a 48-week pattern, the Stretching Entitlement box will show.
 If you cannot see this box, please contact the Early Years Management Information team and we will update Synergy for you.

- (5) Please complete the days the child attends.

The screenshot shows the 'Funding Details' tab in the FIS Provider Portal. The form is divided into several sections:

- Funding Details:** Includes 'Start Date*', 'End Date*', 'Weeks Attended in Term*' (input: 0.00), 'Present during Census' (checkbox), 'Attends Two Days or More' (checkbox), and 'Stretching Entitlement' (checkbox).
- Attendance Days:** A list of days from Monday to Sunday, each with 'Yes' and 'No' radio buttons.
- Universal Funded Hours per Week:** Includes 'Universal Hours*' (input: 0.00).
- Non-Funded Hours per Week:** Includes 'Non-Funded Hours*' (input: 0.00).
- Maximum Values Allowed:** A red box containing: Number of Weeks: 14.00, Universal Weekly Hours: 10, Universal Termly Hours: 110, Universal Yearly Hours: 380.

At the bottom, there are 'Save' and 'Cancel' buttons, and a note: '*denotes mandatory fields'. A red box with a white arrow points from the 'Attendance Days' section to the 'Stretching Entitlement' checkbox.

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4

Please note that once steps 1 - 5 are complete, these are the only data fields that can be amended in the ‘Funding Details’ tab. Adding in the weeks to the “Weeks Attended in Term” and the hours to the “Universal Funded Hours Per Week” fields are not able to be input on this tab.

Please now move to the ‘Pending Adjustment’ tab.

Click on the **'Pending Adjustments'** tab.

This will show the maximum termly hours that can be claimed in the red box at the bottom.

To add the hours or weeks being claimed, you need to complete the 'Number of Hours' fields by clicking on the drop down field and choosing an option of "More or Less Hours" and typing in the second box the **total number of hours for the term** that the child's record is to be adjusted by.

Example 1: A child starts mid-term

- A child has become eligible after the beginning of term and starts at the setting on 1 February, doing term time hours.
- Therefore, there are 7 weeks left of term and they are attending 9 hours a week (= total 63 hours).
- Select **'More Hours'** from the drop-down menu and type 63 in the second box.
- In the Reason box:
 - enter the reason for the adjustment;
 - the hours and weeks you wish to claim;
 - how the hours entered have been calculated i.e. ? hours x ? weeks = ? Hours.
- Once all the information has been entered, click on **'Save'**.

Please note that if a parent wants to gradually increase their child's hours over the term as they settle in, more than one adjustment for that child can be submitted in the term, if their hours slowly increase over the term.

Example 2: A new child was missed off the Actuals claim

- A new child was eligible from the beginning of term, but was missed off the Actuals claim and you now need to claim for the whole term as an adjustment.
- Therefore, as the child is attending term time, there are 11 weeks in this particular term and they are attending 10 hours a week (= total 111 hours).
- Select 'More Hours' from the drop-down menu and type 111 in the second box.
- In the Reason box:
 - enter the reason for the adjustment;
 - the hours and weeks you wish to claim;
 - how the hours entered have been calculated i.e. ? hours x ? weeks = ? Hours.
- Once all the information has been entered, click on 'Save'.

Please note that if a parent wants to gradually increase their child's hours over the term as they settle in, more than one adjustment for that child can be submitted in the term, if their hours slowly increase over the term.

Summary Child Details Parent / Carer Details Funding Details Pending Adjustment Notes

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

Missed child from Actuals claim as been attending since the start of term.
10 hours a week x 11 weeks= 110 hours

Maximum Values Allowed:
Universal Termly Hours: 165
Universal Yearly Hours: 570

Save Cancel *denotes mandatory fields

There is now a new tab called 'Notes'. This is optional.

Please use this tab if you wish to add **any notes about the child** i.e. they have now changed their name by deed poll, or the original record had an incorrect dob, address etc.

The screenshot shows the 'Notes' tab in the FIS Provider Portal. The top navigation bar includes 'Home Forms' and 'Funding'. Below this, a secondary navigation bar lists 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main content area has a tabbed interface with 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Pending Adjustment', and 'Notes'. The 'Notes' tab is active, showing two sections: 'Add a new note' with a large text input area, and 'Notes History'. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that '*denotes mandatory fields'.

Adding New Starters

To add a child, click on the 'Add Child' button.

A screen will appear with five tabs at the top; 'Child Details', 'Parent/Carer Details', 'Funding Details', 'Pending Adjustment' tab and 'Notes'.

First complete the **Child Details** tab. Mandatory fields are marked by an asterisk (*).

Hints and Tips

- Please do not make any changes to the 'SEN COP Stage' box – this must remain as “unknown”. This information is determined by KCC’s SEN Team and they will alter it, if needed.
- When entering the child’s date of birth, please use the drop-down calendar. Click in the box and the calendar for the current month will appear. If you click on the year, you can then use the arrows to go back to another year and then select the correct month and date.

Next, click on the '**Parent/Carer Details**' tab.

Completion of this tab is optional, but you will need to either complete all the fields or leave it blank.

The screenshot shows the 'Parent/Carer Details' form within the 'Funding' section of the FIS Provider Portal. The navigation bar includes 'Home Forms' and 'Funding', with sub-tabs for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The 'Parent / Carer Details' tab is selected, with other tabs for 'Child Details', 'Funding Details', 'Pending Adjustment', and 'Notes'. A message states: 'Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.' The form is divided into two columns: 'Parent / Carer Details' and 'Partner Details'. Each column contains input fields for 'Forename', 'Surname', and 'DOB', followed by a row with two checkboxes: 'NI or' and 'NASS Number'. Below the form are 'Save' and 'Cancel' buttons, and a note: '*denotes mandatory fields'.

Click on the 'Funding Details' tab.

- (1) Click on the Default Term dates and when they appear, change the dates, if this is applicable.
- (2) In the **Spring Term only**, please tick the "Present during Census" box. If this is not ticked, we cannot guarantee that a payment will be processed.
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- Funding Details:** Includes fields for 'Start Date*', 'End Date*', and 'Weeks Attended in Term*' (set to 0.00). A blue button labeled 'Default Term Dates' is positioned next to the 'End Date' field. There are checkboxes for 'Present during Census', 'Attends Two Days or More', and 'Stretching Entitlement'.
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At the bottom of the form, there are 'Save' and 'Cancel' buttons, and a note: '*denotes mandatory fields'.

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Please note:

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Please note that once steps 1 - 5 are complete, these are the only data fields that can be amended in the ‘Funding Details’ tab. Adding in the weeks to the “Weeks Attended in Term” and the hours to the “Universal Funded Hours Per Week” fields are not able to be input on this tab.

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Summary Child Details Parent / Carer Details Funding Details Pending Adjustment Notes

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

Missed child from Actuals claim as been attending since the start of term.
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Maximum Values Allowed:
Universal Termly Hours: 165
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The screenshot shows the 'Notes' tab in the FIS Provider Portal. The top navigation bar includes 'Home Forms' and 'Funding'. Below it, a secondary navigation bar contains 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main content area has a tabbed interface with 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Pending Adjustment', and 'Notes'. The 'Notes' tab is active, showing two sections: 'Add a new note' with a large text input area, and 'Notes History' which is currently empty. At the bottom left, there are 'Save' and 'Cancel' buttons. A small asterisk note '*denotes mandatory fields' is located at the bottom center.

Checking the claims before submitting

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

The Pending Universal Adj Hours you have entered, the Funded Hours (inc Adj) and the Total Funding Amount for Term (inc Adj) are now displayed.

Check that these adjusted hours have now been input correctly.

The status description will now show “New, Unsubmitted Child” meaning a new child has been added, **but not** submitted.

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

3 & 4 Year Olds – Universal and Extended Entitlement Adjustments
 After headcount has closed please inform MI of the type of adjustment you are submitting using the list below:

- Incorrect headcount claim - incorrect hours submitted
- Child left off headcount - child in attendance during headcount but missed off claim
- Late joiner - a child starting after headcount week who has not claimed FEE funding in the current term
- Appeal - changes to a child’s FEE funding (this will be looked at on a case by case basis and cannot be guaranteed)

2 Year Old Funding (FF2)
 There can be only one *Actuals* submission on Synergy per term.

- Any new claims submitted after the first payment cut-off date need to be submitted as an adjustment and will be paid in accordance with the (FF2) Provider Payment Schedule
- If you wish to increase a child’s hours, please submit an adjustment but inform MI in the reason box that it is Extra Hours for an existing child

Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds CHANGE

Add Child
Enter EY Voucher
Send Claim

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
!	↻	New, Unsubmitted Child	Lane, Penny <small>(02-Feb-2018)</small>	15.00	15.00	£76.50
!	↻	New, Unsubmitted Child	Sue, Peggy <small>(14-May-2018)</small>	12.00	12.00	£61.20

Add Child
Enter EY Voucher
Send Claim

Sending the claim

Click on the 'Send Claim' button as shown below 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 you see the status "New, Unsubmitted Child", as shown below, this means you still need to click on "Send Claim".

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

3 & 4 Year Olds – Universal and Extended Entitlement Adjustments
 After headcount has closed please inform MI of the type of adjustment you are submitting using the list below:

- Incorrect headcount claim - incorrect hours submitted
- Child left off headcount - child in attendance during headcount but missed off claim
- Late joiner - a child starting after headcount week who has not claimed FEE funding in the current term
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Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds [CHANGE](#)

Add Child
Enter EY Voucher
Send Claim

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
❗	↻	New, Unsubmitted Child	Lane, Penny (02-Feb-2018)	15.00	15.00	£76.50
❗	↻	New, Unsubmitted Child	Sue, Peggy (14-May-2018)	12.00	12.00	£61.20

Add Child
Enter EY Voucher
Send Claim

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 screen, as per below.

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

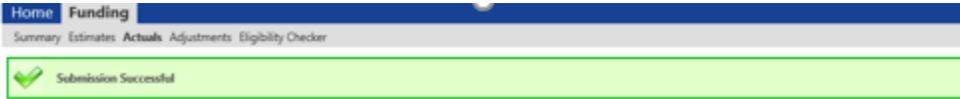
The screenshot shows a green banner at the top with a checkmark icon and the text "Submission Successful". Below this is a light blue box containing instructions for submitting adjustments for 3 & 4 Year Olds and 2 Year Old Funding (FF2). A grey button labeled "Submit Adjustments: 2020 - 2021 Spring - 2 Year Olds CHANGE" is positioned below the instructions. At the bottom of the page, there are three blue buttons: "Add Child", "Enter EY Voucher", and "Send Claim". Below the buttons is a table with the following columns: Status, Child, Pending Universal Adj Hours, Funded Hours (inc Adj), and Total Funding Amount for Term (inc Adj). The table contains three rows, all with a status of "New, Awaiting LA Download".

Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
New, Awaiting LA Download	[Redacted] (17-Jun-2018)			
New, Awaiting LA Download	Lane, Penny (02-Feb-2018)	15.00	15.00	£76.50
New, Awaiting LA Download	Sue, Peggy (14-May-2018)	12.00	12.00	£61.20

ALERT:

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.

Incorrect Submissions **** IMPORTANT ****



Once you press “Send Claim” you then receive this green “Submission Successful” bar.

However, if the status next to your records shows ‘Unsubmitted Claim’, it means the claim has not been submitted correctly, due to a technical error.

The status should say ‘Awaiting LA download’ (as per the previous page), once it has actually been submitted.

If this happens to you, please e-mail miearlyears@kent.gov.uk with all your setting’s details and a screen shot of this page to show the error, so the team can investigate.

IMPORTANT INFORMATION

- **Please be aware that you can submit adjustments up to the last claim deadline date of the term. This date is outlined on the FF2 payment schedule, available on our Kelsi page.**
- Adjustment payments will be calculated based on the **last submission made, before the relevant claim deadline.**
- Once the final deadline date has passed for the term, your Adjustments screen for that term will show a summary of what you have submitted.
- Individual child records can still be viewed, but no further changes can be made.

Funding 'Summary' Tab

To view a payment summary for a term you will need to select the relevant year and term. Then select the 'Funding Type' (1).

Home **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Summary Head Count Records for 2019 - 2020 - Spring

2019 - 2020

Spring

Funding Type
2 Year Olds
3 & 4 Year Olds

A summary of Estimates and Actuals for that term will then be displayed, **although no Estimates are submitted for 2 Year old funding.**

To view a different term, or funding type, click 'CHANGE' (2).

The screen will return to the list of terms, where another can be selected.

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Summary: 2020 - 2021 Spring - 2 Year Olds CHANGE

Rate x Hours may not equal Totals as rounding is applied per child.
The totals shown are the sum of the funding amounts per child.

Estimates		Actuals	
Term Length (Weeks)	11.00	Term Length (Weeks) Term Time	11.00
▶ Provider Rate applied	£5.10	Term Length (Weeks) Stretched	14.00
Estimate Funding		▶ Provider Rate applied to child funding	£5.10
Hours Per Week	0.00	Universal Funding	
Term Funding Amount	£0.00	Funded Hours for Term	0.00
Interim %	0.00%	Funding Amount @ Provider Rate	£0.00
Interim Amount Payable	£0.00	Universal Funding Amount	£0.00
<hr/>		Totals	
Total Interim Amount Paid to Date (before Adj)	£0.00	Funded Hours for Term	0.00
<hr/>		Funding Amount @ Provider Rate	£0.00
Interim Amount Payable Balance	£0.00	Child Weightings	£0.00
<hr/>		<hr/>	
		Term Funding Amount	£0.00
		Interim Amount Paid (before Adj)	£0.00
		<hr/>	
		Term Funding Amount Balance	£0.00
		Adjustments Paid with Final Payment	£0.00
		<hr/>	
		Actual Amount Paid (Inc. Adj)	£0.00
		<hr/>	
Processed	No		
Processed Date			

FAQs

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. [The 'Home Screen' is displaying a notification advising that there are un-submitted child funding records.](#)
6. [The 'Actuals' Tab is showing a 'Summary' of my submission and will not allow me to enter any amendments.](#)
7. [The 'Adjustments' Tab is displaying a message asking me to email the Authority to request changes to the 'Adjustments'.](#)
8. [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.](#)
9. [A child is attending one day at my setting but is also attending another setting. Should I tick the Attending Two Days or More checkbox?](#)
10. [I am now offering/no longer offering Stretched Funding/2 Year Old Funding.](#)
11. [OOPs Message](#)
12. [Status Descriptions Explained](#)

FAQs

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'



FAQs

5. 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.

**6. The 'Actuals' Tab is showing a 'Summary' of my submission and will not allow me to enter any amendments.**

The submission date for 'Actuals' has passed. You will only be able to submit amendments through the 'Adjustments' Tab.

7. 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 2 Year old 'Actuals' or 3&4 year old 'Estimates' or 3&4 year old 'Actuals' are active and adjustment claims cannot be processed. Management Information will email all providers when 2 year old adjustment claims can be entered.

8. 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.

FAQs

9. A child is attending one day at my setting, but is also attending another setting. Should I tick the Attending Two Days or More checkbox?

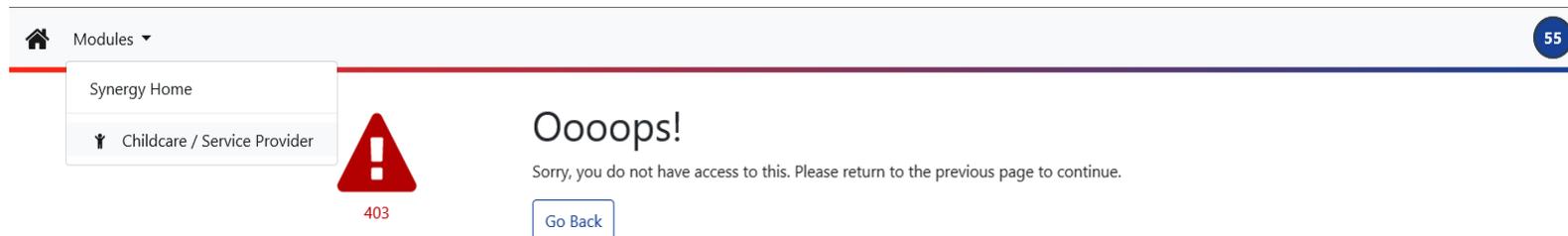
Yes, as the child is attending for a total of more than one day across the settings.

10. I am now offering/no longer offering Stretched Funding/2 Year Old Funding.

If the type of provision you are offering changes, for example, if you begin or cease to offer Stretched Funding or 2 Year Old Funding, 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

11. 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 'modules' and then 'Childcare/Service Provider'. This should return you to the funding page.



FAQs

12. 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:

Status Description	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 Child	This means a NEW child has been entered, but not submitted.
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.
Unsubmitted Claim	This means an EXISTING child has been amended, but not submitted.
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.