

**Children Young People and Education
Directorate**

Submitting an Estimate Claim Via the Synergy FIS Provider Portal

Guidance for Free Early Education Providers



Contents

<u>Introduction.....</u>	<u>3</u>
<u>Accessing the Provider Portal.....</u>	<u>3</u>
<u>Logging onto the Provider Portal.....</u>	<u>4</u>
<u>Security Notice.....</u>	<u>5</u>
<u>Home Screen.....</u>	<u>6</u>
<u>Funding Details/Claiming Funding.....</u>	<u>7</u>
<u>Opening Estimate.....</u>	<u>7</u>
<u>Submitting An Estimate Claim.....</u>	<u>9</u>
<u>After Deadline Date.....</u>	<u>14</u>
<u>FAQs.....</u>	<u>15</u>

Introduction

The Synergy Family Information Service (FIS) Provider Portal is used by childcare providers to claim for 9 Months to 5 years old Early Years funding. 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:
<https://www.kelsi.org.uk/school-management/data-and-reporting/management-information/early-years-free-entitlement>

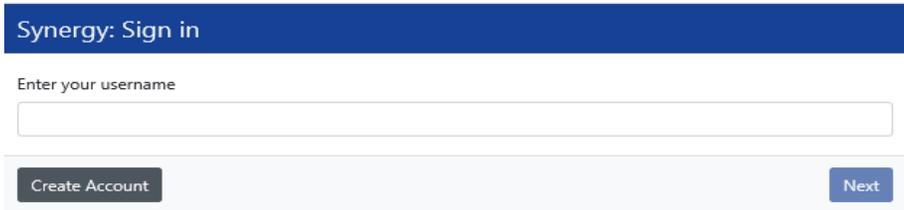
Once this page has loaded, please scroll to the section “Synergy Provider Portal” and use the link to log on.

Logging onto the Provider Portal

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

Please do not use your email address.

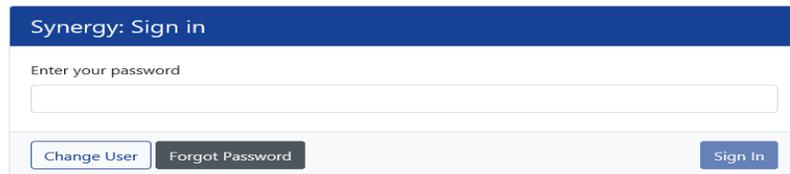
Click on Next.



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:



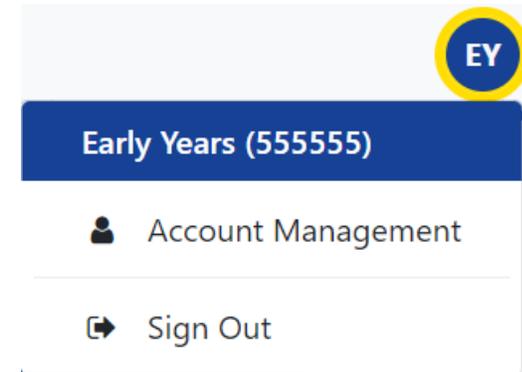
Please click on “Accept”. A message will appear saying “redirecting you”. This will take a few seconds and then the 'Home Screen' will be displayed. If you accidentally click on “Reject”, it will sign you out and you will need to log in again.

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 "EY".

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

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



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'.

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.

<https://www.kelsi.org.uk/school-management/data-and-reporting/management-information/early-years-free-entitlement>

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".

Opening an Estimate Claim to submit the estimate number of funded hours for the following funding term

- (1) Click the '**Estimates**' tab.
- (2) Select the 'Term'.
- (3) Select the Funding Type you wish to submit an estimate on.

You can claim estimates for 9 Months Plus, Disadvantaged (FF2), 2 Year Old Working Parent Entitlement and 3&4 Year Olds. Each entitlement has to be calculated and submitted separately.

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.

1 Home Forms Funding

Summary **Estimates** Actuals Adjustments Eligibility Checker

Estimates Head Count Records for 2024 - 2025 - Autumn

2024 - 2025

Autumn
Submission Period:
21-Jun-2024 to 02-Jul-2024

2023 - 2024

2022 - 2023

2021 - 2022

2020 - 2021

2019 - 2020

	Funding Type	Office use only	Ready To Process	Processed
	2 Year Olds - Disadvantaged (FF2)			
	2 Year Olds - Working Entitlement			
	3 & 4 Year Olds			
	9 Months + Working Entitlement			

The maximum weeks for each term are as follows:

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

Submitting an Estimate claim

(1) The 'Number of Weeks for this Term' field defaults to the term-time number of weeks.
Please amend it, if you are claiming stretched funding.

(2) Add the 'Estimated Number of Funded Hours Per Week for this Term' into this field as a **total** of the weekly funded hours within this eligibility type, for **all the children** you are expecting to attend your setting next term, either as new children or continuing children.
For 3&4 year olds, please include all universal and extended hours within this figure.
Please see pages 12 and 13 for examples.

(3) Click "Calculate".

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds CHANGE

1 Number of Weeks for this Term

2 Estimate Number of Funded Hours Per Week for this Term
Please enter both numbers, click 'Calculate', then 'Send Claim'

3

(4) A message will appear advising of the total number of hours that are being claimed **for all children** for the term. Check that this is correct. If you have made an error, just enter the number of hours again and click on the calculate button again to produce a new total hours amount.

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 585.00 Hours in this Term

Please enter both numbers, click 'Calculate', then 'Send Claim'

4

5

(5) Once the sum is correct, then submit your claim by clicking on 'Send Claim'.

(6) **NB:** When the claim has been sent, a green bar will appear at the top to confirm that the submission has been successful.

Note: The information can be amended and re-submitted whilst the submission dates remain open as this will overwrite your last estimate submission.

Estimate payments will be calculated based on the last submitted information before the final submission date.

ALERT:

Please take a screenshot of this screen, showing the date and time, including the green 'Submission Successful' message, the term and the type of funding you are in. 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.

The screenshot shows the FIS Provider Portal interface. At the top, there is a navigation bar with 'Home', 'Forms', and 'Funding' tabs. Below this, there is a sub-navigation bar with 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker' options. A green bar with a checkmark icon and the text 'Submission Successful' is displayed. Below this, there is a button labeled 'Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds CHANGE'. Further down, there are input fields for 'Number of Weeks for this Term' (with the value 13.00) and 'Estimate Number of Funded Hours Per Week for this Term' (with the value 45). Below these fields, there is a text prompt: 'Please enter both numbers, click 'Calculate', then 'Send Claim''. At the bottom, there are two buttons: 'Calculate' and 'Send Claim'.

(7) Repeat the process for each entitlement that you wish to submit an estimate for. To do this, once you have taken a screenshot of the successful submission, click 'CHANGE' to return to the list of entitlements.

Example 1

*A setting is offering 38 weeks of funding over the year and claiming 13 weeks in the Summer Term.
There are 10 children at the setting, 9 of whom are claiming 15 hours and 1 child is claiming 10 hours.
The weekly hours claimed is therefore 145 hours. (9 x 15= 135 +10 = 145 hours).*

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 1,885.00 Hours in this Term

Please enter both numbers, click 'Calculate', then 'Send Claim'

Example 2 Settings offering stretched and non-stretched

You can only enter one value for the weeks, if you are offering funding to children over both 38 weeks and 48 weeks, you will need to decide whether to enter your estimate based on the stretched weeks or non-stretched weeks.

You can calculate the total hours for the term for all children and then divide this amount by the number of weeks you are entering and that is the total weekly hours you should enter.

*6 children claiming under the 38 week non-stretched offer
15 hours x 13 weeks = **1,170 termly hours***

*5 children claiming under the 48 week stretched offer
12 hours x 18 weeks = **1,080 termly hours***

A total of 2,250 termly hours

The setting chooses to show the number of weeks for the term as 13. The weekly hours will be entered as 173.08 (2,250 hours divided by 13 weeks).

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 2,250.04 Hours in this Term

Please enter both numbers, click 'Calculate', then 'Send Claim'

Calculate **Send Claim**

After Deadline Date

Once the Estimate submission date has passed, the Estimate screen for that term will show a summary of the submission for each entitlement.

Please note this is the termly total funded hours for all children.

The screenshot displays the FIS Provider Portal interface. At the top, there is a navigation bar with 'Home' and 'Funding' tabs. Below this, a sub-menu contains 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A prominent banner reads 'Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds' with a 'CHANGE' link. Below the banner, a table shows the 'Estimated Hours' for the current term, which is 1595.00.

Estimated Hours
1595.00

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. [I am now offering/no longer offering Stretched Funding/30 Hours Funding/2 Year Old Funding.](#)
6. [OOPs Message](#)
7. [Do I need to enter an estimate for each entitlement?](#)

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.

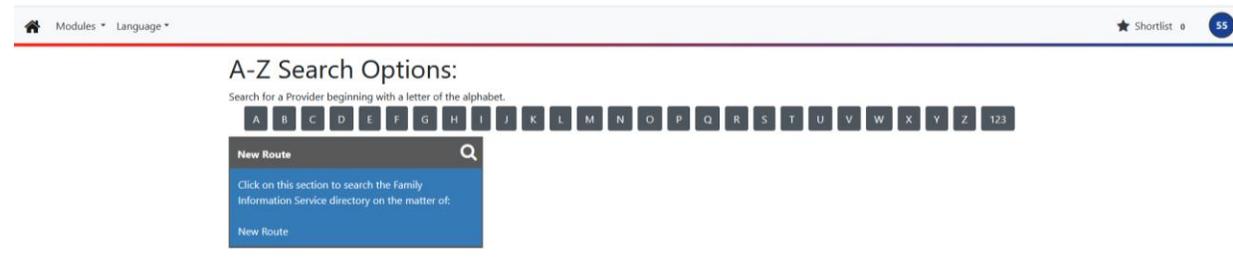
3. My password has expired.

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'



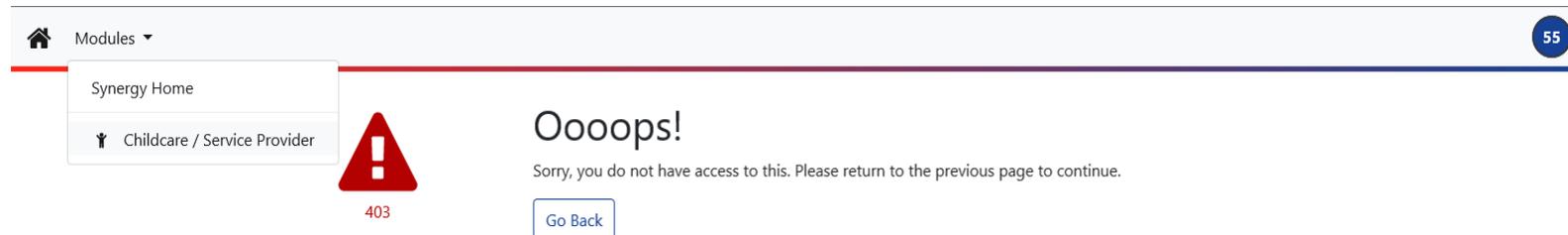
FAQs

5. I have changed the entitlements I offer.

If the type of provision you are offering changes, for example, if you begin or cease to offer Stretched Funding, The Working Parent Entitlement Funding, 2 Year Old Disadvantaged, 9 Months Plus, 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

6. 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.



7. Do I need to enter an estimate for each entitlement?

The Estimate is an optional return, if you wish to claim an estimate, you will need to submit a separate claim for each entitlement you offer.