

**Children Young People and Education
Directorate**

**Submitting an Estimate Claim Via the Synergy FIS Provider Portal
(3 & 4 Year Old Funding Only)**

Guidance for Free Early Education Providers



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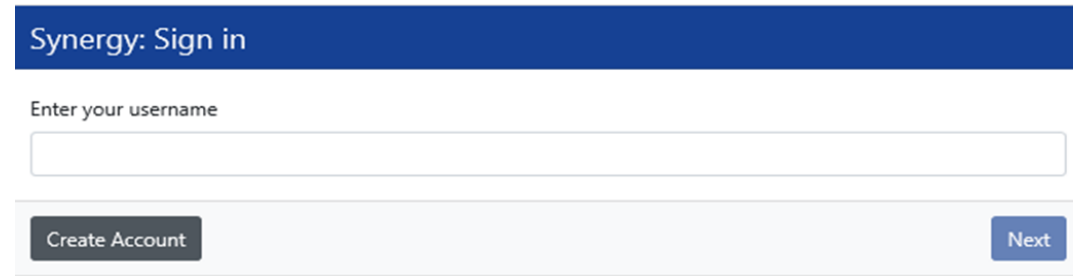
Introduction

Synergy Family Information Service (FIS) Provider Portal is used by child care providers to claim for 2, 3 and 4 year old Early Years funding. The Portal links directly into the Synergy system, where the Early Years Free Entitlement Team will process funding payments.

Please note that the Synergy system is not used for Early years Pupil Premium Applications or Disability Access Funding

Accessing the Provider Portal

When you receive the email from Management Information advising you that the Provider Portal is open for submission of adjustment claims you will need to login to the system to submit your claim.



Enter the "User Name" and 'Password' in the relevant boxes and click 'Sign In'. The 'Home Screen' will be displayed. The "User Name" is the 6-digit DfE URN for your setting **do not** use your email address.

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 Management Information on 03000 413700 or eyfreefor2@kent.gov.uk and we will reset this for you.

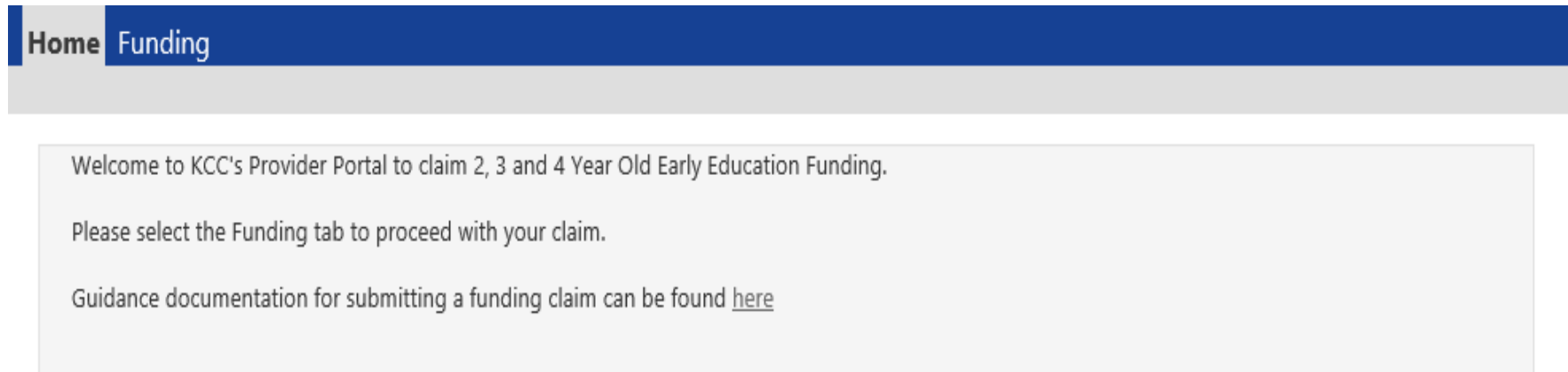
Should you need to change your 'password' please remember that 'passwords' must be a minimum of 7 characters in length, contain at least one capital letter, one number and cannot be the same as the "User Name".

Please be aware that the same 'password' cannot be used more than once and all passwords must be updated every 42 days.

Home Screen

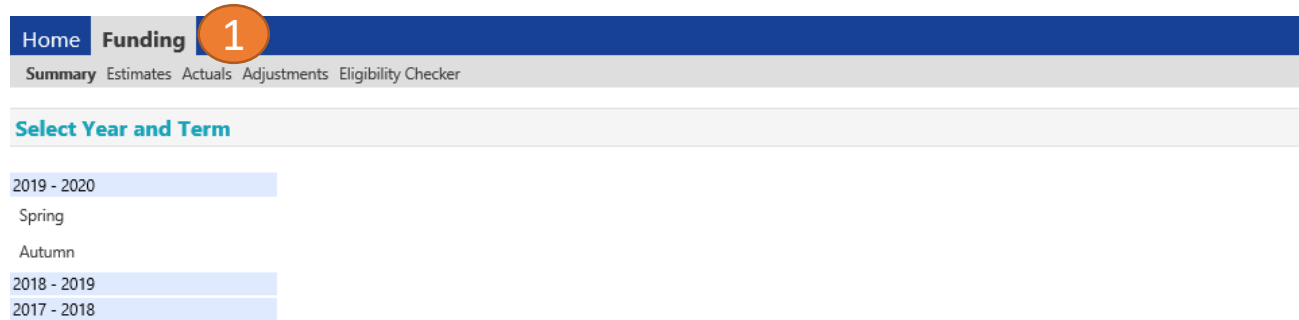
Once a user has logged in the 'Home Screen' will be displayed. In the top right-hand corner, you will see your 'User Name' and the 'Log Out' option. To change your password, you will need to click on your 'User Name'.

On the left-hand side are two tabs – 'Home' and 'Funding'. Various notifications and messages will also be displayed in this screen from time to time.



Funding Applications

To start a claim for funding, click on the 'Funding' Tab (1).



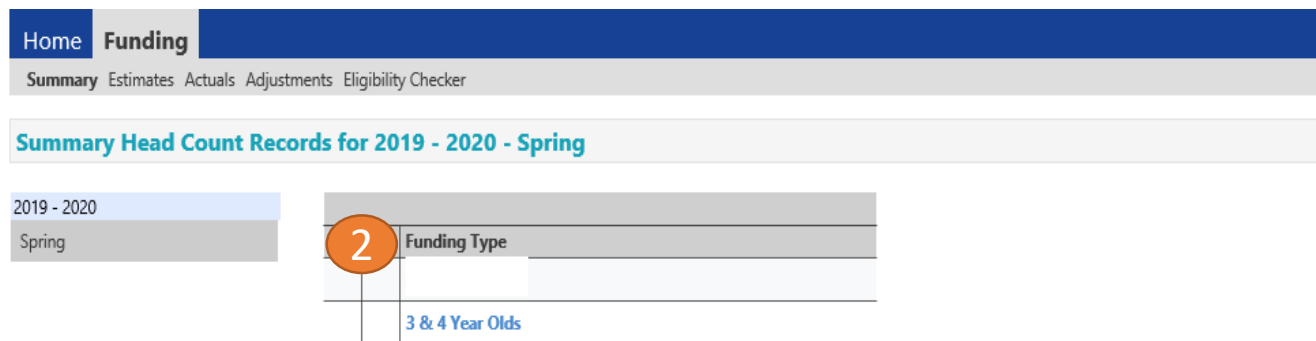
The Funding screen will be displayed which has five tabs at the top of the screen: 'Summary', 'Estimates', 'Actuals', 'Adjustments' and "Eligibility Checker".

Please be aware that the 'Estimates' and "Eligibility Checker" tabs are not used for FF2 claims.

Funding Summary Tab

This tab shows a summary of 'Estimates', 'Actuals' and 'Adjustments' that have been submitted in previous terms/years.

To view a payment summary' for a term you will need to select the relevant year and term. Then select the 'Funding Type' (2)



A summary of Estimates and Actuals for that term will be displayed. To view a different term or funding type click 'CHANGE' (1). The screen will return to the list of terms where another can be selected.

Home Funding	
Summary Estimates Actuals Adjustments Eligibility Checker	
Summary: 2019 - 2020 Spring - 2 Year Olds 1 CHANGE	
<p>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.</p>	
Estimates	
Term Length (Weeks)	14.00
▸ Provider Rate applied	£4.00
Estimate Funding	
Hours Per Week	0.00
Term Funding Amount	£0.00
Interim %	50.00%
Interim Amount Payable	£0.00
Total Interim Amount Paid to Date (before Adj)	£0.00
Interim Amount Payable Balance	£0.00
Processed	Yes
Processed Date	30-Jul-2019
Actuals	
Term Length (Weeks) Term Time	14.00
Term Length (Weeks) Stretched	16.00
▸ Provider Rate applied to child funding	£4.00
Universal Funding	
Funded Hours for Term	570.00
Funding Amount @ Provider Rate	£2280.00
Universal Funding Amount	£2280.00
Extended Funding	
Funded Hours for Term	230.00
Funding Amount @ Provider Rate	£920.00
Extended Funding Amount	£920.00
Totals	
Funded Hours for Term	800.00
Funding Amount @ Provider Rate	£3200.00
Child Weightings	£0.00
Term Funding Amount	£3200.00
Interim Amount Paid (before Adj)	£0.00
Term Funding Amount Balance	£3200.00
Adjustments Paid with Final Payment	£0.00
Actual Amount Paid (Inc. Adj)	£3200.00

Submitting an Estimate Claim

- (1) Click the 'Estimates' tab.
- (2) Select the 'Term and (3) Funding Type

The screenshot shows the 'Estimates' tab selected in the navigation menu. Below the menu, there is a section titled 'Estimates Head Count Records for 2019 - 2020 - Spring'. Under this section, the '2019 - 2020' term is selected, and the 'Spring' submission period is indicated. A table below shows the 'Funding Type' '3 & 4 Year Olds' selected, with 'Ready To Process' and 'Processed' columns both containing checkmarks.

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

- (4) Enter the 'Number of Weeks for the Term' (the default for non-stretched terms has been pre-populated).

The screenshot shows the 'Submit Estimate' form for '2019 - 2020 Spring - 3 & 4 Year Olds'. The form has two input fields: 'Number of Weeks for this Term' with a value of 11.00, and 'Estimate Number of Funded Hours Per Week for this Term' with a value of 0.00. Below the fields are 'Calculate' and 'Send Claim' buttons.

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

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

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

(5) Enter the 'Estimated Number of Funded Hours Per Week'
as a total of the weekly funded hours for all children that you are expecting to attend your setting ([Please see page 10 for example](#))

(6) Click 'Calculate' .

(7) 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

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Estimate: 2019 - 2020 Spring - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

5 Estimate Number of Funded Hours Per Week for this Term There are 1,595.00 Hours in this Term
 Please enter both numbers, click 'Calculate', then 'Send Claim'

6 Calculate Send Claim

- (8) Once the sum is correct, then submit your claim by clicking on 'Send Claim'.
- (9) A green bar will appear at the top to confirm that the submission has been successful.

The screenshot shows the FIS Provider Portal interface. At the top, there is a navigation bar with 'Home' and 'Funding' (selected). Below this is a sub-navigation bar with 'Summary', 'Estimates' (selected), 'Actuals', 'Adjustments', and 'Eligibility Checker'. A green notification bar with a checkmark icon and the text 'Submission Successful' is highlighted with a circled '9'. Below this is a header for 'Submit Estimate: 2019 - 2020 Spring - 3 & 4 Year Olds CHANGE'. The form contains two input fields: 'Number of Weeks for this Term' with the value '11.00' and 'Estimate Number of Funded Hours Per Week for this Term' with the value '145'. A note states 'There are 1,595.00 Hours in this Term' and 'Please enter both numbers, click 'Calculate', then 'Send Claim''. At the bottom, there are two buttons: 'Calculate' and 'Send Claim', with the 'Send Claim' button highlighted with a circled '8'.

Note: The information can be amended and re-submitted whilst the submission dates remain open.

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

Example 1

A setting is offering 38 weeks of funding over the year and claiming 11 weeks in the Spring 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.

Example 2 Settings offering stretched and non-stretched

You can only enter one value for the weeks, if you are offering funding 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 14 weeks = **1260 termly hours***

*5 children claiming under the 48 week stretched offer
12 hours x 16 weeks = **960 termly hours***

*A total of **2220 termly hours***

The setting chooses to show the number of weeks for the term as 14 and the weekly hours will be entered will be 158.57(2220 divided by 14)

Home
Funding

Summary
Estimates
Actuals
Adjustments
Eligibility Checker

Submit Estimate: 2019 - 2020 Spring - 3 & 4 Year Olds
CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 1,595.00 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 what was submitted.

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

The screenshot displays the 'Funding' section of the FIS Provider Portal. The navigation bar includes 'Home' and 'Funding'. Below the navigation bar, there are links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A prominent blue button reads 'Submit Estimate: 2019 - 2020 Spring - 3 & 4 Year Olds CHANGE'. Below this, a table shows the 'Estimated Hours' for the term, with a value of 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. [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/30 Hours Funding/2 Year Old Funding.](#)
11. [OOPs Message](#)
12. [Do I need to enter an estimate for FF2 funding?](#)

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.

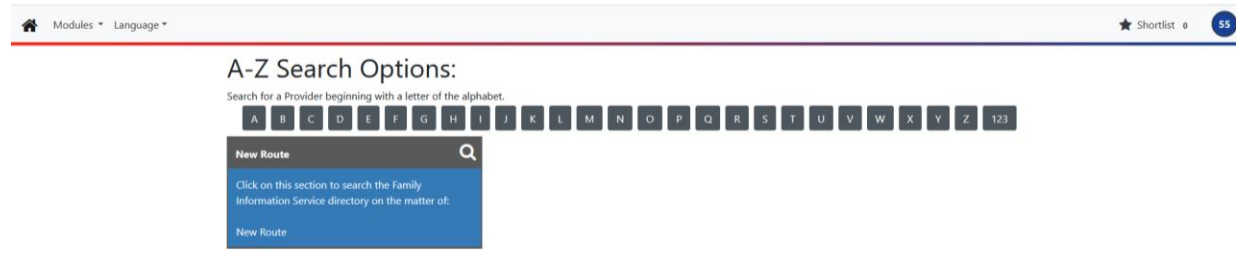
Please contact eyfe@kent.gov.uk or eyfreefor2@kent.gov.uk to have your account unlocked and your password reset.

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?

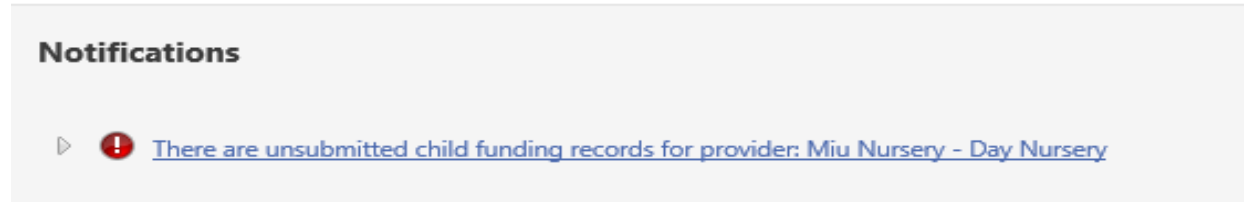
If you are seeing the screen below, please click on 'Modules' and then select 'Childcare/Service Provider'



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?

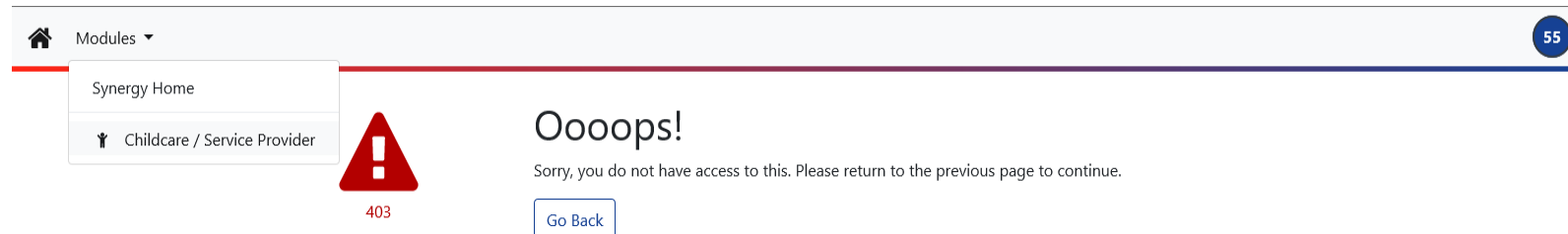
Yes, as the child is attending for a total of more than one day across the settings.

10. I am now offering/no longer offering Stretched Funding/30 Hours 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, 30 Hours Funding or 2 Year Old Funding, the Early Years Free Entitlement 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 eyfe@kent.gov.uk or eyfreefor2@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 the ‘modules’ and then ‘Childcare/Service Provider’. This should return you to the funding page.



12. Do I need to enter an estimate for FF2 funding?

No, an estimate claim is not required for FF2 funding. Please see the guidance notes for submitting 2-year-old funding claims.