

## **Children Young People and Education Directorate**

## **Submitting a 3 and 4 Year Old Headcount Claim Via the Synergy FIS Provider Portal**

## **Guidance for Free Early Education Providers**



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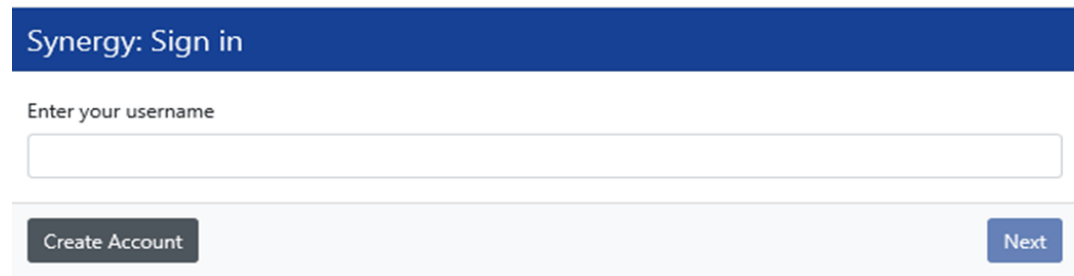
## Introduction

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.

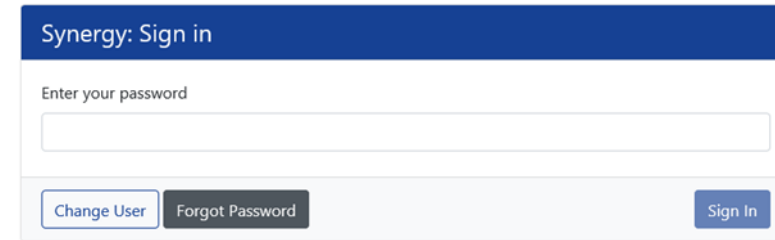
**Please note that the Synergy system is not used for Early years Pupil Premium Applications or Disability Access Funding**

## Accessing the Provider Portal

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



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



The screenshot shows the 'Synergy: Sign in' page. It features a dark blue header with the text 'Synergy: Sign in'. Below the header is a text input field labeled 'Enter your password'. At the bottom of the form, there are three buttons: a light blue 'Change User' button, a dark grey 'Forgot Password' button, and a blue 'Sign In' button.

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 422828 or [eyfe@kent.gov.uk](mailto:eyfe@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".

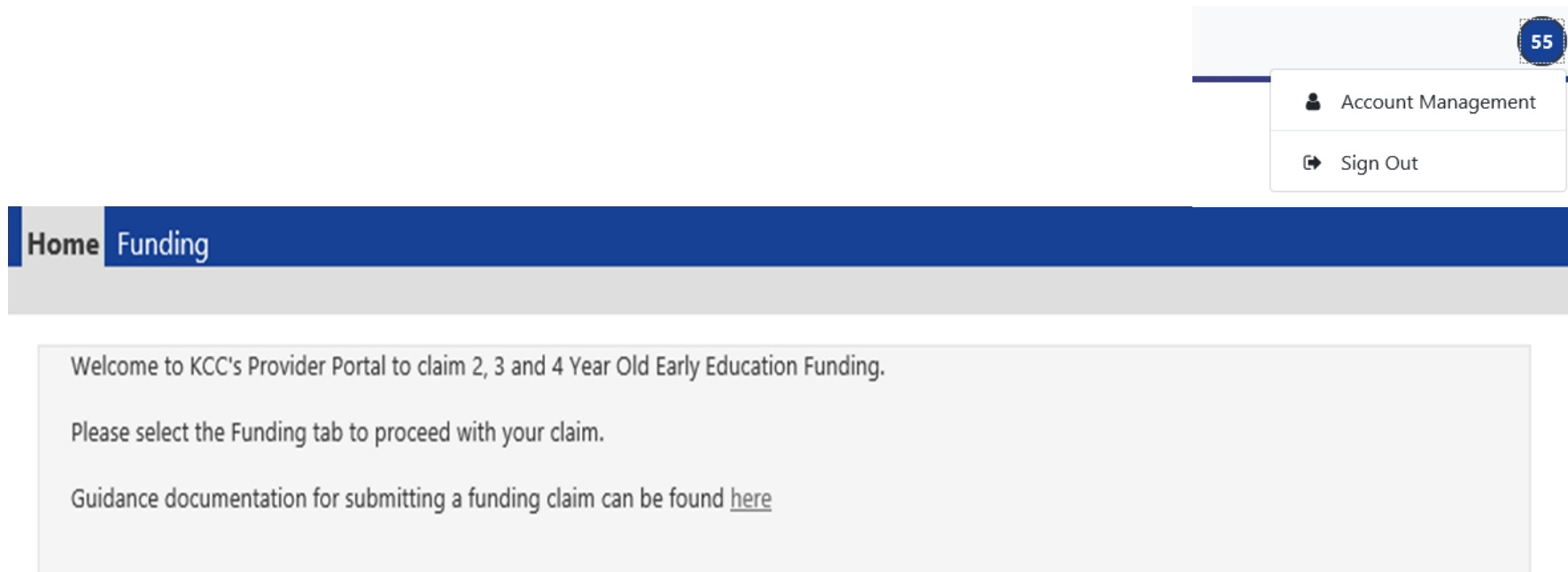
Please be aware that the same 'password' cannot be used more than once

## Home Screen

Once a user has logged in the 'Home Screen' will be displayed.

In the top right-hand corner, you will see a button, once selected, it will give you the options of 'Account Management' and Sign Out'. To change your password, you will need to select 'Account Management'.

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.



## Claiming Funding

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



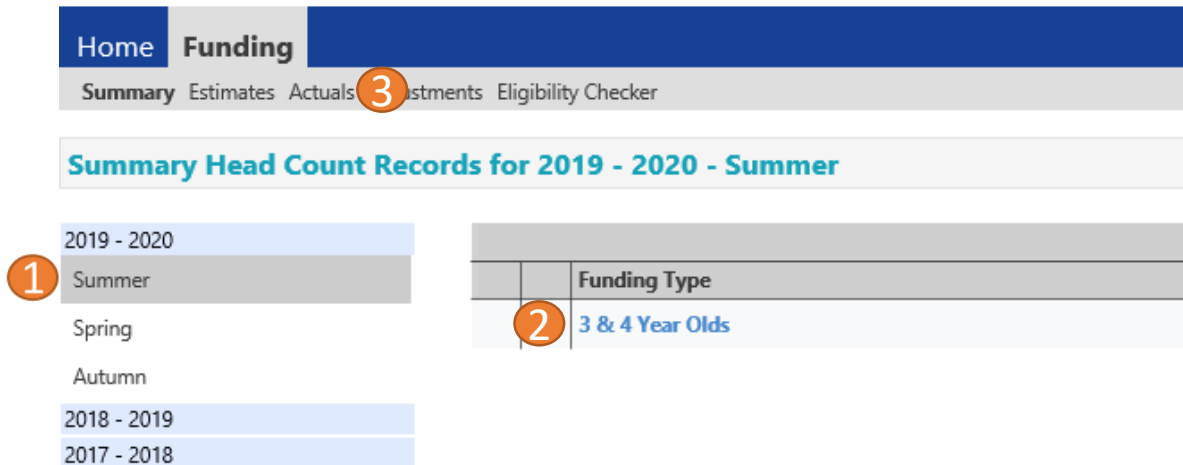
The Funding screen will be displayed which has five tabs at the top of the screen: 'Summary', 'Estimates', 'Actuals', 'Adjustments' and "Eligibility Checker".

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

## Submitting Actuals (Headcount) 3 and 4 Year Olds

To submit an Actuals (Headcount) claim please select the relevant Term (1) and select '3 & 4 Year Olds' (2).

Select the 'Actuals' (3) and 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.



## Continuing Claims

A list of continuing children who were funded in the previous term and are still in the eligible Date of Birth range for the new term will show.

(1) You must work through this list before adding any new children to the system.

First check if any of the children have either left your setting or are no longer claiming the funding with you. If they have you will need to click on the red 'X' to remove them from the list. (2)

**Submit Actual: 2019 - 2020 Summer - 3 & 4 Year Olds** CHANGE

Add Child
Send Claim

	Status	Child Name <sup>1</sup>	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
<sup>2</sup> <input checked="" type="checkbox"/>	Unchanged	<a href="#">Angela, Aardvark</a> (10-Apr-2015)	195.00	0.00	£795.60		29-Oct-2018 - 11-Mar-2019 Grace Period: 31-Aug-2019
<input checked="" type="checkbox"/>	Unchanged	<a href="#">Benito, Bear</a> (01-Jul-2015)	195.00	0.00	£795.60		
<input checked="" type="checkbox"/>	Unchanged	<a href="#">Samuel, Sovereign</a> (30-Aug-2017)	195.00	0.00	£795.60		

The following message will show, if the child is no longer claiming with you then click on the 'Yes' button (1).

Confirm Delete

Are you sure you want to delete child: Aardvark, Angela from this headcount record?

1 Yes
No

Your summary of children will now show the record as 'Delete Pending' (2).

Add Child
Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
2	↻ Delete Pending, Submitted	<a href="#">Aardvark, Angela</a> <small>(10-Apr-2015)</small>	0.00	0.00	£0.00		
✖	Unchanged	<a href="#">Bear, Benito</a> <small>(01-Jul-2015)</small>	0.00	0.00	£0.00		
✖	Unchanged	<a href="#">Sovereign, Samuel</a> <small>(30-Aug-2017)</small>	0.00	0.00	£0.00		

Add Child
Send Claim

You now need to add the details of the funded hours and weeks to the rest of the continuing children already on your list.

Click on the child's record and this will open on their summary.

**Name: Benito Bear DOB: 07-Jan-2016**

Summary Child Details Parent / Carer Details Funding Details

<b>Term Start Date</b>	01-Apr-2020	<b>Universal Funding</b>	
<b>Term End Date</b>	24-Jul-2020	Funded Hours Per Week	15.00
<b>No of weeks attended</b>	13.00	Funded Hours for Term	195.00
<b>Nominated for DAF</b>	No		
<b>Provider Total Rate</b>	£4.08	<b>Funding Amount @ Provider Rate</b>	<b>£795.60</b>
		<b>Child Weightings</b>	<b>£0.00</b>
		<b>Universal Funding Amount</b>	<b>£795.60</b>
		<b>Totals</b>	
		Funded Hours Per Week	15.00
		Funded Hours for Term	195.00
		<b>Total Funding (excl. Adj)</b>	<b>£795.60</b>
		Total amount from Adjustments	£0.00
		Total amount from Pending Adjustments	£0.00
		<b>Total Funding For Term (inc Adj)</b>	<b>£795.60</b>

Save Cancel \*denotes mandatory fields



Select the 'Child Details' Tab and check that the information shown is correct.

Summary
Child Details
Parent / Carer Details
Funding Details

**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\***  ✕

\*denotes mandatory fields

If a child has changed their name by deed poll or following the completion of an adoption order, please contact Management Information on 03000 422828 for guidance. **Please do not amend the child's name in the Provider Portal.**

Please ensure that if you have a child that has left the setting you delete the record and if you have a new starter you add them as new. If names are overwritten in the Provider Portal, it could lead to funding being missed for children.

Please **do not** make any changes to the 'SEN COP Stage' box – this information is determined by the 'KCC SEN' Team and they will alter it if needed.

(1) Select the 'Parent/Carer Details' Tab and check that the information shown is correct.

Completion of this tab is mandatory for children who are eligible for the extended hours. Part 4 of the Parental Declaration form must be completed and signed by the parent before completing this section.

Enter the Parent names and National Insurance number (2) and tick the consent box for checking eligibility for the 30 hours (3).

If the child is not eligible for the extended hours the completion of this tab is optional.

Please note Management Information **do not** use the Synergy system for **EYPP** applications.

Please see the link below to find the relevant application on KELSI.

<https://www.kelsi.org.uk/early-years/sufficiency-and-sustainability/free-early-education/claiming-eypp-and-daf>

Summary Child Details **1** Parent / Carer Details Funding Details

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended hours.

Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.

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

**2**  NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP **3**  30H

**Partner Details**

Forename

Surname

DOB

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  30H

Save Cancel \*denotes mandatory fields

Select the Funding Details Tab.

The screen will display the maximum hours that can be claimed each week and the maximum termly hours. Please check that this is showing the correct number of weeks for your setting based on whether you are claiming over 38 weeks or 48 weeks.

For any children stretching the funding, where you are claiming as a 48-week pattern, the Stretching Entitlement box (1) will show and must be ticked. If you cannot see this box, please contact Management Information and we will update Synergy for you.

## 38 Week Pattern

**Funding Details**

Start Date\* 01-Apr-2020

End Date\* 24-Jul-2020

Default Term Dates

Weeks Attended in Term\* 13.00

Present during Census

Attends Two Days or More

Nominated for DAF\*  Yes  No

**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\* 15.00

**Extended Funded Hours per Week**

Extended Hours\* 0.00

30H Eligibility Code

30 Hours Free Childcare

Eligible for 30H

**Total Funded Hours per Week**

Total Funded: 15.00

**Non-Funded Hours per Week**

Non-Funded Hours\* 0.00

ⓘ 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: 13.00

Universal Weekly Hours: 15

Universal Termly Hours: 195

Universal Yearly Hours: 570

Extended Weekly Hours: 15

Extended Termly Hours: 195

Extended Yearly Hours: 570

## 48 Week Pattern

**Funding Details**

Start Date\* 01-Apr-2020

End Date\* 24-Jul-2020

Default Term Dates

Weeks Attended in Term\* 13.00

Present during Census

Attends Two Days or More

Nominated for DAF\*  Yes  No

Stretching Entitlement  1

**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\* 15.00

**Extended Funded Hours per Week**

Extended Hours\* 0.00

30H Eligibility Code 50029984688

30 Hours Free Childcare

Eligible for 30H

**Total Funded Hours per Week**

Total Funded: 15.00

**Non-Funded Hours per Week**

Non-Funded Hours\* 0.00

ⓘ 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: 18.00

Universal Weekly Hours: 12

Universal Termly Hours: 216

Universal Yearly Hours: 576

Extended Weekly Hours: 12

Extended Termly Hours: 216

Extended Yearly Hours: 576

The maximum weeks for each term are as follows:

<b>38 Week Offer</b>			<b>48 Week Stretched Offer</b>	
Autumn Term	14 Weeks		Autumn Term	16 Weeks
Spring Term	11 Weeks		Spring Term	14 Weeks
Summer Term	13 Weeks		Summer Term	18 Weeks

**(1)** Click on the Default Term Dates blue button and the dates for the academic period, as defined by the Department for Education, will populate. Please change this to reflect the start and end dates of the child's funding pattern for the term using the drop-down calendar to enter the dates.

**(2)** Ensure that the Weeks Attended in Term is correct and amend if necessary.

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

**(4)** 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).

**(5)** Nominated for DAF must be set to NO. Please note Management Information do not use the Synergy system for DAF (Disability Access Fund) applications. Please use the link to KELSIs to download an application form (see page 9 for the link to KELSIs).

**(6)** The Stretching Entitlement box must be ticked if you are claiming over a 48-week pattern of funding, the number of weeks must also be amended in line with the 48-week pattern of funding (see grid on page 14).

The screenshot shows the 'Funding Details' tab in the Synergy system. It contains several input fields and buttons. A blue button labeled 'Default Term Dates' is circled in blue with the number 1. Below it, a text input field for 'Weeks Attended in Term\*' contains the value '13.00', also circled in blue with the number 2. To the right, there is a section for 'Attendance Days' with radio buttons for 'Yes' and 'No' for each day of the week. Below this, there are checkboxes for 'Present during Census' (circled in blue with 3), 'Attends Two Days or More' (circled in blue with 4), 'Nominated for DAF\*' (radio buttons for 'Yes' and 'No', with 'No' selected, circled in blue with 5), and 'Stretching Entitlement' (checkbox checked, circled in blue with 6). Further down, there are input fields for 'Universal Hours\*' (15.00), 'Extended Hours\*' (0.00), and '30H Eligibility Code' (50029984688). A blue button labeled '30 Hours Free Childcare' is also visible. At the bottom, there is a 'Total Funded Hours per Week' section with a 'Total Funded:' input field containing '15.00'. On the right side, there is a 'Non-Funded Hours per Week' section with a 'Non-Funded Hours\*' input field containing '0.00'. A red box highlights the 'Maximum Values Allowed' section, which lists: Number of Weeks: 18.00, Universal Weekly Hours: 12, Universal Termly Hours: 216, Universal Yearly Hours: 576, Extended Weekly Hours: 12, Extended Termly Hours: 216, and Extended Yearly Hours: 576.

(7) Enter the hours the child is claiming at your setting in the Universal Funded Hours per Week box.

(8) Complete the attendance days.

(9) Complete the Non-Funded hours, these are hours the child attends at your setting that the parent pays for. If the parent does not pay for any additional hours please enter as 0.

**Extended Entitlement** – (Ensure that the Parent/Carer Details Tab has been completed). You must have carried out a 30-hour validation check through the KELSI website prior to claiming the extended hours in this section.

(10) Enter the hours the child is claiming at your setting in the Extended Hours per Week box.

(11) Complete the 30H Eligibility Code (this is the 11-digit code given to the parent from HMRC).

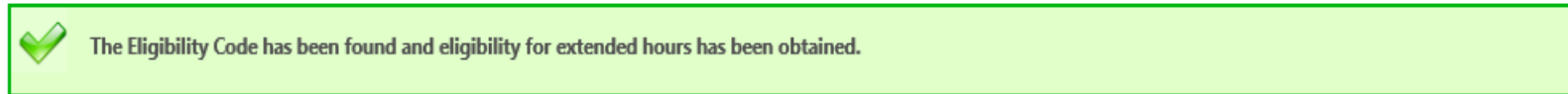
(12) Click on the Blue 30 Hours Free Childcare button. This checks the code is eligible for funding in the current term. A message will appear at the top of the screen, please see next page for messages,

(13) Press the **SAVE** button.

The screenshot shows the 'Funding Details' tab in the FIS Provider Portal. The form includes the following sections and fields:

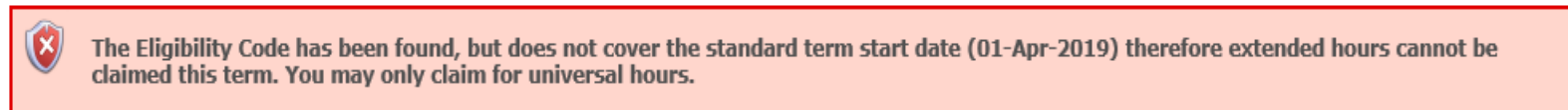
- Funding Details:**
  - Start Date\*: 01-Apr-2020
  - End Date\*: 24-Jul-2020
  - Default Term Dates (button)
  - Weeks Attended in Term\*: 13.00
  - Present during Census:
  - Attends Two Days or More:
  - Nominated for DAF\*:  Yes  No
  - Stretching Entitlement:
- Attendance Days (8):**
  - Attends 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\* (7): 15.00
- Extended Funded Hours per Week:**
  - Extended Hours\* (10): 0.00
  - 30H Eligibility Code (11): 50029984688
  - 30 Hours Free Childcare (12) (button)
  - Eligible for 30H:
- Non-Funded Hours per Week (9):**
  - Non-Funded Hours\*: 0.00
- Summary Box (Maximum Values Allowed):**
  - Number of Weeks: 18.00
  - Universal Weekly Hours: 12
  - Universal Termly Hours: 216
  - Universal Yearly Hours: 576
  - Extended Weekly Hours: 12
  - Extended Termly Hours: 216
  - Extended Yearly Hours: 576
- Bottom Section:**
  - Save (13) (button)
  - Cancel (button)
  - \*denotes mandatory fields

You should receive a message saying that the eligibility for the 30 hours has been confirmed at the top and the Eligible for 30H box will now be ticked on the Funding Details Tab.



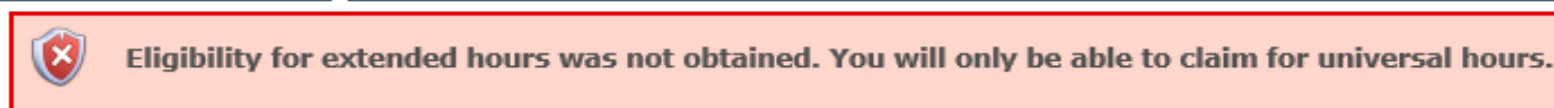
However, you may receive one of the following error messages which will need to be resolved before you can submit your claim.

**A red message stating the eligibility code has been found but does not cover the standard term start date –**



This means that a claim cannot be submitted as the code is not valid for the current term – contact Management Information and they will investigate further. To enable you to submit the universal hours, set the extended funded hours to 0.00 whilst this is investigated (leave all other information in place).

**A red message stating eligibility for extended hours was not obtained -**



This means that the information submitted is not correct. Please confirm with the parent that the information entered matches that supplied to HMRC when the parent applied for the extended entitlement (the code, child's date of birth and the parent's National Insurance number). When checked, resubmit or contact Management Information if all information is correct and they will investigate further. To enable you to submit the universal hours, set the extended funded hours to 0.00 whilst this is investigated (leave all other information in place).

The Summary of children will now show the hours entered, along with the eligibility dates (Eligibility Status) for any children claiming the extended entitlement. A calculated payment amount will show in 'Total Funding Amount For Term)

(14) When you are sure that your Summary is correct click on the **Send Claim** button.

Not submitted

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
↶	Delete Pending, Submitted	<a href="#">Aardvark, Angela</a> (10-Apr-2015)	0.00	0.00	£0.00		
⚠	Edit Pending	<a href="#">Bear, Benito</a> (07-Jan-2016)	192.00	160.00	£1408.00		08-Jul-2019 - 11-Oct-2019 Grace Period: 31-Dec-2019
⊠	Unchanged	<a href="#">Sovereign, Samuel</a> (30-Aug-2017)	0.00	0.00	£0.00		

Add Child Send Claim 14

(15) A Submission Successful message will appear.

Home Funding

Summary Estimates **Actuals** Adjustments Eligibility Checker

15  Submission Successful

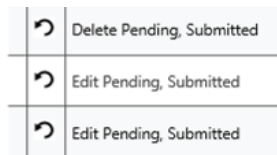
**We recommend that you take a screenshot of the 'Submission Successful' message in case you have any problems regarding your submission.**



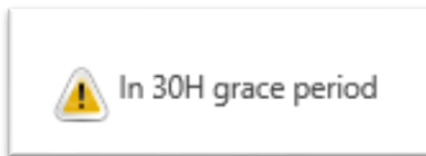
After you have pressed the send claim button, each child should have one of the following status against each child's name:

**'Edit pending, submitted'** – a continuing child's record you have submitted

**'Edit pending, unchanged'** – a continuing child's record you have submitted and MI has started to process for payment



Some children may have an amber triangle with an exclamation mark against their record. This indicates that you are claiming extended hours for a child, but they are currently in their "Grace Period". You cannot claim extended hours for the first time, for a child at your setting, if they are already in their grace period. However, if your setting claimed extended hours for the child in the previous academic term then you can continue to claim until the grace period end date.



Please contact Management Information for further clarification on this point.

## Hints and Tips

- Once you have entered hours and weeks for all continuing children, MI recommend submitting these claims before you add any New Children.
- Synergy will **not** carry forward hours/weeks from previous terms, please ensure all continuing children are reviewed before submitting
- You may add, or amend your headcount claim and resubmit up to the deadline date for the headcount claims.

## New Starters

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

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
↻	Delete Pending, Submitted	<a href="#">Aardvark, Angela</a> (10-Apr-2015)	0.00	0.00	£0.00		
↻	Edit Pending, Submitted	<a href="#">Bear, Benito</a> (01-Jul-2015)	0.00	0.00	£0.00		
↻	Edit Pending, Submitted	<a href="#">Sovereign, Samuel</a> (30-Aug-2017)	0.00	0.00	£0.00		

1
Add Child
Send Claim

A screen will appear with three tabs at the top – Child Details, Parent/Carer Details and Funding Details. First complete the Child Details tab. Mandatory fields are marked by an asterisk (\*).

Home
Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details
Parent / Carer Details
Funding Details

**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

## Hints and Tips

- Please do not make any changes to the SEN COP Stage box – this must remain as “unknown” – as this information is determined by the KCC 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.

If the child is not eligible for the extended hours the completion of this tab is optional.

- Please note completion of this tab is mandatory for children who are eligible for the extended hours.
- Part 4 of the 'Parental Declaration' form must be completed and signed by the parent before completing this section. Enter the 'Parent names' and 'National Insurance' number and tick the consent box for checking eligibility for the 30 hours.
- You must have carried out a 30-hour validation check through the KELSI website prior to claiming the extended hours in this section.

Child Details
Parent / Carer Details
Funding Details

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended hours.

Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.

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" value="Fiona"/>	Forename	<input type="text"/>
Surname	<input type="text" value="Florin"/>	Surname	<input type="text"/>
DOB	<input type="text" value="8/11/1995"/>	DOB	<input type="text"/>
<input checked="" type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text" value="AB123456D"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>
Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input checked="" type="checkbox"/> 30H	Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> 30H

Save
Cancel

\*denotes mandatory fields

Next, click on the 'Funding Details' tab and enter the information in the appropriate boxes. Mandatory fields are marked by an asterisk (\*), including non-funded hours.

### Funding Details

**Start Date\***

**End Date\***

**Default Term Dates**

**Weeks Attended in Term\***

Present during Census

Attends Two Days or More

**Nominated for DAF\***  Yes  No

Stretching Entitlement

### Universal Funded Hours per Week

**Universal Hours\***

### Extended Funded Hours per Week

**Extended Hours\***

30H Eligibility Code

**30 Hours Free Childcare**

Eligible for 30H

### Total Funded Hours per Week

**Total Funded:**

### 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

### 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: **14.00**

Universal Weekly Hours: **10**

Universal Termly Hours: **140**

Universal Yearly Hours: **380**

Extended Weekly Hours: **10**

Extended Termly Hours: **140**

Extended Yearly Hours: **380**

Save
Cancel

\*denotes mandatory fields

**(1)** Click on the Default Term Dates blue button and the dates for the academic period, as defined by the Department for Education, will populate. Please change this to reflect the start and end dates of the child's funding pattern for the term using the drop-down calendar to enter the dates.

**(2)** Ensure that the Weeks Attended in Term is correct and amend if necessary.

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

**(4)** 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).

**(5)** Nominated for DAF must be set to NO. Please note Management Information do not use the Synergy system for DAF (Disability Access Fund) applications. Please use the link to KELSI to download an application form (see page 9 for the link to KELSI).

**(6)** The Stretching Entitlement box must be ticked if you are claiming over a 48-week pattern of funding, the number of weeks must also be amended in line with the 48-week pattern of funding (see grid on page 14).

The screenshot shows the 'Funding Details' tab of the Synergy FIS Provider Portal. The form contains the following fields and options:

- Funding Details:**
  - Start Date\*:** 01-Apr-2020
  - End Date\*:** 24-Jul-2020
  - Default Term Dates:** A blue button with callout 1.
  - Weeks Attended in Term\*:** 13.00
  - Present during Census:**  (callout 3)
  - Attends Two Days or More:**  (callout 4)
  - Nominated for DAF\*:**  Yes  No (callout 5)
  - Stretching Entitlement:**  (callout 6)
- 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\*:** 15.00
- Extended Funded Hours per Week:**
  - Extended Hours\*:** 0.00
  - 30H Eligibility Code:** 50029984688
  - 30 Hours Free Childcare:** A blue button
  - Eligible for 30H:**
- Total Funded Hours per Week:**
  - Total Funded:** 15.00
- Non-Funded Hours per Week:**
  - Non-Funded Hours\*:** 0.00
- Information:**
  - ⓘ 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:** (Red box)
  - Number of Weeks: **18.00**
  - Universal Weekly Hours: **12**
  - Universal Termly Hours: **216**
  - Universal Yearly Hours: **576**
  - Extended Weekly Hours: **12**
  - Extended Termly Hours: **216**
  - Extended Yearly Hours: **576**

(7) Enter the hours the child is claiming at your setting in the Universal Funded Hours per Week box.

(8) Complete the attendance days.

(9) Complete the Non-Funded hours, these are hours the child attends at your setting that the parent pays for. If the parent does not pay for any additional hours please enter as 0.

**Extended Entitlement** – (Ensure that the Parent/Carer Details Tab has been completed). You must have carried out a 30-hour validation check through the KELSI website prior to claiming the extended hours in this section.

(10) Enter the hours the child is claiming at your setting in the Extended Hours per Week box.

(11) Complete the 30H Eligibility Code (this is the 11-digit code given to the parent from HMRC).

(12) Click on the Blue 30 Hours Free Childcare button.

This checks the code is eligible for funding in the current term.

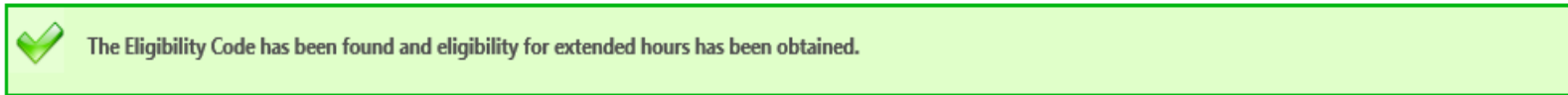
A message will appear at the top of the screen (please see next page for messages)

(13) Press the **SAVE** button.

The screenshot shows the 'Funding Details' tab in the FIS Provider Portal. The form contains the following sections and fields:

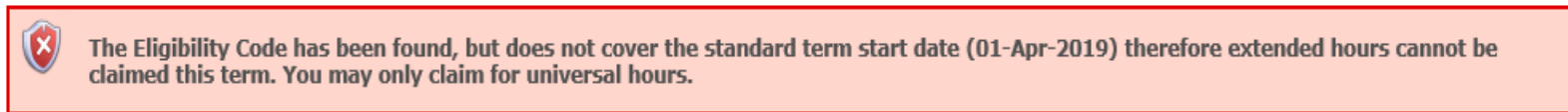
- Funding Details:**
  - Start Date\*: 01-Apr-2020
  - End Date\*: 24-Jul-2020
  - Default Term Dates (button)
  - Weeks Attended in Term\*: 13.00
  - Present during Census:
  - Attends Two Days or More:
  - Nominated for DAF\*:  Yes  No
  - Stretching Entitlement:
- Attendance Days (8):**
  - Attends 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\* (7): 15.00
- Extended Funded Hours per Week:**
  - Extended Hours\* (10): 0.00
  - 30H Eligibility Code: 50029984688 (11)
  - 30 Hours Free Childcare (12) (button)
  - Eligible for 30H:
- Non-Funded Hours per Week:**
  - Non-Funded Hours\* (9): 0.00
- Maximum Values Allowed:**
  - Number of Weeks: 18.00
  - Universal Weekly Hours: 12
  - Universal Termly Hours: 216
  - Universal Yearly Hours: 576
  - Extended Weekly Hours: 12
  - Extended Termly Hours: 216
  - Extended Yearly Hours: 576
- Total Funded Hours per Week:**
  - Total Funded: 15.00
- Buttons:** Save (13), Cancel
- Footnote:** \*denotes mandatory fields

You should receive a message saying that the eligibility for the 30 hours has been confirmed at the top and the Eligible for 30H box will now be ticked on the Funding Details Tab.



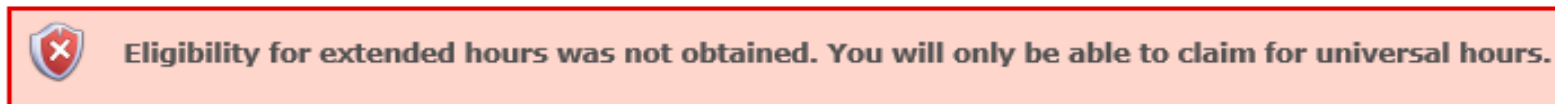
However, you may receive one of the following error messages which will need to be resolved before you can submit your claim.

**A red message stating the eligibility code has been found but does not cover the standard term start date –**



This means that a claim cannot be submitted as the code is not valid for the current term – contact Management Information and they will investigate further. To enable you to submit the universal hours, set the extended funded hours to 0.00 whilst this is investigated (leave all other information in place).

**A red message stating eligibility for extended hours was not obtained -**



This means that the information submitted is not correct. Please confirm with the parent that the information entered matches that supplied to HMRC when the parent applied for the extended entitlement (the code, child's date of birth and the parent's National Insurance number). When checked, resubmit or contact Management Information if all information is correct and they will investigate further. To enable you to submit the universal hours, set the extended funded hours to 0.00 whilst this is investigated (leave all other information in place).

Once all new children have been added the claim can be submitted for payment. Check the Actuals tab to ensure that all children you wish to claim for are listed and that all children, other than those you have marked as leaving, have hours recorded in the Universal and or Extended Hours columns.

(14) When you are sure that your Summary is correct click on the **Send Claim** button.

Not submitted

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
↻	Delete Pending, Submitted	<a href="#">Aardvark, Angela</a> (10-Apr-2015)	0.00	0.00	£0.00		
↻	Edit Pending, Submitted	<a href="#">Bear, Benito</a> (07-Jan-2016)	192.00	160.00	£1408.00		08-Jul-2019 - 11-Oct-2019 Grace Period: 31-Dec-2019
ⓘ ↻	Add Pending	<a href="#">Florin, Frederick</a> (08-Jul-2016)	210.00	70.00	£1120.00		29-May-2019 - 21-Sep-2019 Grace Period: 31-Dec-2019
↻	Edit Pending, Submitted	<a href="#">Sovereign, Samuel</a> (30-Aug-2016)	168.00	0.00	£672.00		

Add Child Send Claim 14

(15) A Submission Successful message will appear.

15

Home Funding

Summary Estimates **Actuals** Adjustments Eligibility Checker

✓ Submission Successful

**We recommend that you take a screenshot of the message in case you have any problems regarding your submission.**



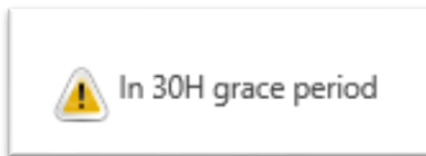
After you have pressed the send claim button, each child should have one of the following status against each child's name:

**'Add pending, submitted'** – a new child you have submitted

**'Add pending, unchanged'** – a new child you have submitted and MI has started to process for payment

↶	Delete Pending, Submitted
↶	Edit Pending, Submitted
↶	Edit Pending, Submitted

Some children may have an amber triangle with an exclamation mark against their record. This indicates that you are claiming extended hours for a child, but they are currently in their "Grace Period". You cannot claim extended hours for the first time, for a child at your setting, if they are already in their grace period. However, if your setting claimed extended hours for the child in the previous academic term then you can continue to claim until the grace period end date.



Please contact Management Information for further clarification on this point.

## Hints and Tips

- Information can be amended and re-submitted whilst the submission dates remain open. Actuals payments will be calculated based on the last submitted information before the final submission date.
- Once the Actuals submission date has passed, the Actuals screen for that term will show a summary of what was submitted. Individual child records can still be viewed, but no further changes can be made.

**Note:** The Funding Detail 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, however, it must be during Headcount Week.

If a child is due to start after this date, they must **not be included in the Actuals (Headcount) submission** but must be claimed for afterwards as an Adjustment (see Making an Adjustment for further information).

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.

## 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' (2)

The screenshot shows the 'Funding' tab with the 'Summary' sub-tab selected. Below the navigation bar, there is a section titled 'Summary Head Count Records for 2019 - 2020 - Spring'. On the left, there are two buttons: '2019 - 2020' and 'Spring'. To the right, a dropdown menu for 'Funding Type' is open, showing '2 Year Olds' and '3 & 4 Year Olds'. A red circle with the number '2' is placed over the dropdown menu.

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.

The screenshot shows a detailed funding summary for '2019 - 2020 Spring - 3 & 4 Year Olds'. A red circle with the number '1' is placed over the 'CHANGE' button next to the summary title. The summary is divided into 'Estimates' and 'Actuals' sections. Below the summary, there is a 'Totals' section and a 'Processed' section.

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

## 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. [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.](#)
7. [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?](#)
8. [I am now offering/no longer offering Stretched Funding/30 Hours Funding/2 Year Old Funding.](#)
9. [OOPs Message](#)
10. [How do I check if a 30 hour code is valid?](#)
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?](#)
12. [How do I add children that have started after headcount?](#)
13. [Children's records are not saving](#)
14. [I am getting an error message when I input my 30 Hour code](#)

## 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.

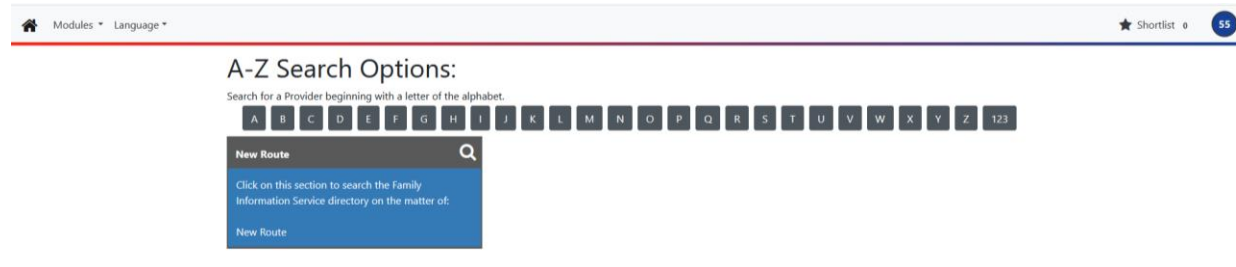
Please contact [eyfe@kent.gov.uk](mailto:eyfe@kent.gov.uk) or [eyfreefor2@kent.gov.uk](mailto:eyfreefor2@kent.gov.uk) to have your account unlocked and your password reset.

### 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?

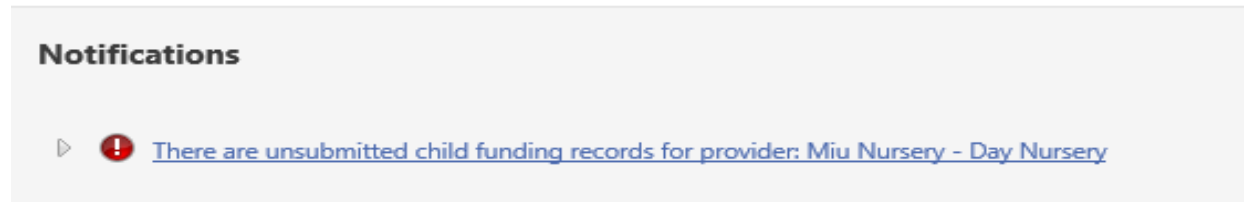
If you are seeing the screen below, please click on 'Modules' and then select 'Childcare/Service Provider'



## FAQs

**5. The 'Home Screen' is displaying a notification advising that there are un-submitted child funding records.**

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

**6. 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.

**7. 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.

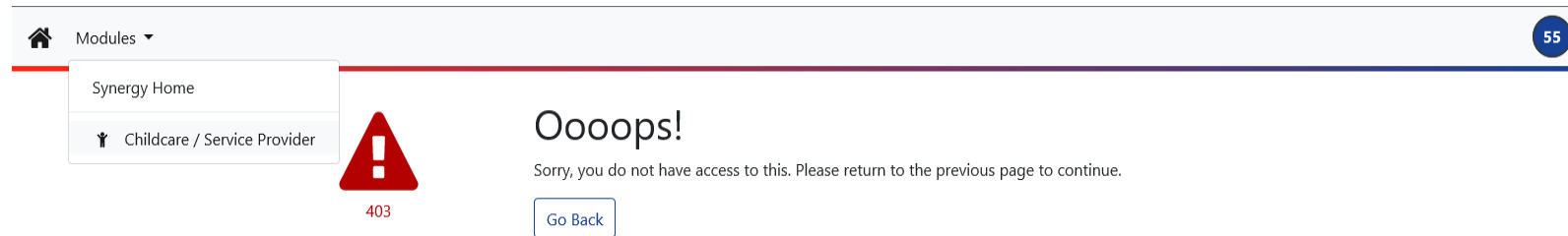
**8. I am now offering/no longer offering Stretched Funding/30 Hours Funding/2 Year Old Funding.**

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](mailto:eyfe@kent.gov.uk) or [eyfreefor2@kent.gov.uk](mailto:eyfreefor2@kent.gov.uk).

## FAQs

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

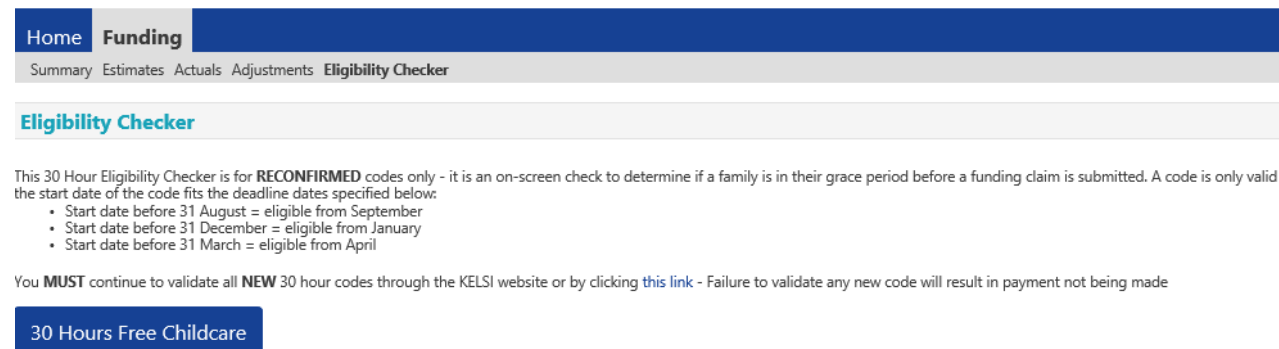
This is a known issue on Synergy; to return to the funding page please click on the ‘modules’ and then ‘Childcare/Service Provider’. This should return you to the funding page.



### 10. How do I check if a 30 hour 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 KELSI 30 Hour Checker this can be found at [www.kent.gov.uk/30hourchecker](http://www.kent.gov.uk/30hourchecker)

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



## FAQs

**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 30 hour check is completed when you press the blue 30 hours free childcare 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 30 hour 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. How do I add children that have started after headcount?**

To add children who have started after Headcount Week or to make other amendments, please submit an adjustment via the 'Adjustments' Tab (see 3 and 4-year old adjustment claim guidance notes for further information).

**13. Children's records are not saving**

If you are experiencing difficulties saving records for the 30 hour children MI 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 30 hours code and the extended hours and click on the Blue 30 Hours Free Childcare 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 Management Information if you are experiencing difficulties with a 30 hour code.