Children Young People and Education Directorate

Submitting 2 Year Old Actual Claims 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 apply 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.

Accessing the Provider Portal

When you receive the email from Management Information advising you that the Provider Portal is open for submission of 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 usually the 6-digit DfE URN for your setting. If you cannot remember your password, or 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.
Home Screen

Once a user has logged in the ‘Home Screen’ will be displayed. In the top right hand corner is the ‘User Name’ and options for ‘User Settings,’ where the user can change their password, and ‘Sign Out.’

On the left hand side are three tabs – ‘Home,’ ‘Forms’ 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.

The Funding screen will be displayed which has five tabs at the top on the left-hand side: Summary, Estimates, Actuals, Adjustments and Eligibility Checker. Please be aware that the Estimate and Eligibility Checker tabs are not used for FF2 claims.
Funding Summary Tab

This tab shows a summary of Actuals and Adjustments that have been submitted in previous terms. To view a payment summary for a particular term and funding type click ‘Select’.

A summary of Actuals for that term will be displayed. To view a different term or funding type click ‘CHANGE’. The screen will return to the list of terms where another can be selected.
To submit a FF2 claim please select the relevant Term and Funding Type.

The FF2 payment schedule, which can be found on KELSI using the link below, shows all the submission date deadlines for the term. [http://www.kelsi.org.uk/__data/assets/pdf_file/0011/41699/Payment-schedule-2018-19.pdf](http://www.kelsi.org.uk/__data/assets/pdf_file/0011/41699/Payment-schedule-2018-19.pdf)

If you are submitting in time for the first payment run you should submit an “Actual” Claim. If submitting after the first payment run you should submit an “Adjustment” claim – please see the guidance notes for 2 Year Old Adjustment Claims.

**Submitting Actuals (2 Year Olds – New Starters & Continuing Claims)**

Check that you are in the right term and funding type

Click on the Actuals tab.

**Continuing Claims**

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

Please note that we do not use the “Enter EY Voucher” button.
It is good practice to 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.

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

Your summary of children will now show the record as Delete Pending.

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.

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

Select the Parent/Carer Details Tab and check that the information shown is correct. Completion of this tab is optional, but you will need to either complete it fully or leave it blank.

Select the Funding Details Tab and the following screen will show:
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 will show. If you cannot see this box, please contact Management Information and we will update Synergy for you.

The maximum weeks for each term are as follows:

<table>
<thead>
<tr>
<th>38 Week Offer</th>
<th>48 Week Stretched Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Autumn Term</td>
<td>14 Weeks</td>
</tr>
<tr>
<td>Spring Term</td>
<td>11 Weeks</td>
</tr>
<tr>
<td>Summer Term</td>
<td>13 Weeks</td>
</tr>
<tr>
<td></td>
<td>Autumn Term</td>
</tr>
<tr>
<td></td>
<td>16 Weeks</td>
</tr>
<tr>
<td></td>
<td>Spring Term</td>
</tr>
<tr>
<td></td>
<td>14 Weeks</td>
</tr>
<tr>
<td></td>
<td>Summer Term</td>
</tr>
<tr>
<td></td>
<td>18 weeks</td>
</tr>
</tbody>
</table>

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.
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. Settings that are offering funding over both a 38 week and 48 week pattern - If the child is accessing their funding over the 48 weeks offer tick the Stretching Entitlement box.
6. Enter the hours the child is claiming at your setting in the Universal Funded Hours per Week box.
7. Complete the attendance days.
8. 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.

Once you have entered the hours and weeks for all the children who are continuing to claim at your setting you can enter the details of any new children who are eligible for the FF2 funding.
New Starters

To add a child, click the ‘Add Child’ button.

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 (*).
Next, click on the ‘Parent/Carer Details’ tab. Completion of this tab is optional but you will need to either complete it fully or leave it blank.

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.

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.
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.
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. Settings that are offering funding over both a 38 week and 48 week pattern - if the child is accessing their funding over the 48 weeks offer tick the Stretching Entitlement box.
6. Enter the hours the child is claiming at your setting in the Universal Funded Hours per Week box.
7. Complete the attendance days.
8. 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.

**Note:** The Term Start Date is the date the Child started in that term. The child must have started and settled before the first payment cut-off date in order to submit as an Actuals claim. If a child is due to start after this date, they **must not** be included in the Actuals submission, but must be claimed for afterwards as an Adjustment (see the guidance notes for 2 Year Old Adjustment Claims for further information). Please remember that you cannot claim funding until the child has been confirmed as eligible.

**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 Term End Date is the date the setting closes, which will not necessarily be the end date for the funding period. If you know at the start of term that a child will be leaving mid-way through the term, please enter the child’s end date in this field.

To save the child’s details click the ‘Save’ button.

Once all known 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 Funded Hours column.

When you are sure that your Summary is correct click on the Send Claim button.
A Submission Successful message will appear.

The records will now show as Submitted. This message may change as Management Information process your claim.

**Note:** 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.

If you missed the deadline for submitting Actuals, to add children who have started after the first payment cut-off date, or to amend a child’s claim, please submit an adjustment via the ‘Adjustments’ tab (see 2 Year Old Adjustment Claims for further information).
FAQs

1. 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.

2. 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.

3. 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.

4. 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.

5. When I save a child’s details in the Actuals tab I get an error message saying: Funded Hours Per Week: Universal Hours exceeds weekly maximum of 10.00 (Funding Details Tab).
   Ensure that the checkbox to confirm that the child is attending two or more days is ticked. If the child is only attending one day, a maximum of 10 hours only can be claimed.

6. When I save a child's details in the Actuals tab I get an error message saying: Weeks Attended in Term – Value cannot be greater than 14.00 (Funding Details Tab)
   Ensure that the checkbox to confirm that the child is stretching the entitlement is ticked. If this box is not showing and you are stretching the funding and wish to claim in a 48 week pattern, please contact Management Information who will update the Synergy system.

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 Stretch Funding

If the type of provision you are offering changes, for example, if you begin or cease to offer Stretch 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. Please be aware that changes to the type of provision you offer can only be made at the start of an academic period (Autumn, Spring or Summer).