

**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

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

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

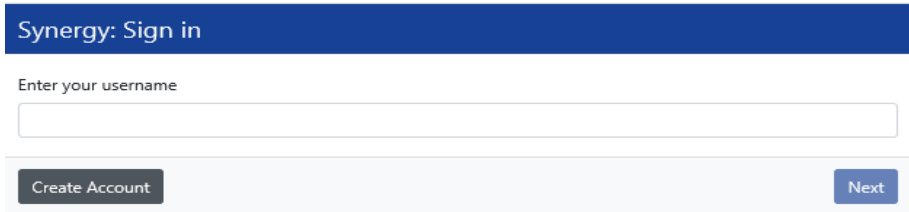
Once this page has loaded, please scroll to the section “Synergy Provider Portal” and use the link to log on.

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.

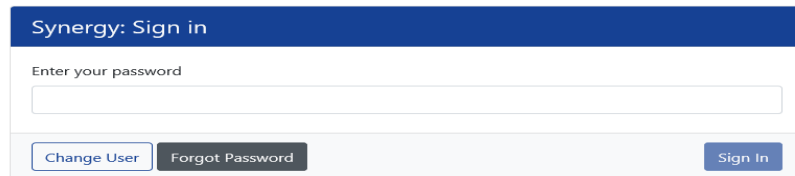
Click on Next.



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 label 'Enter your username' followed by a text input field. 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 label 'Enter your password' followed by a text input field. 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.

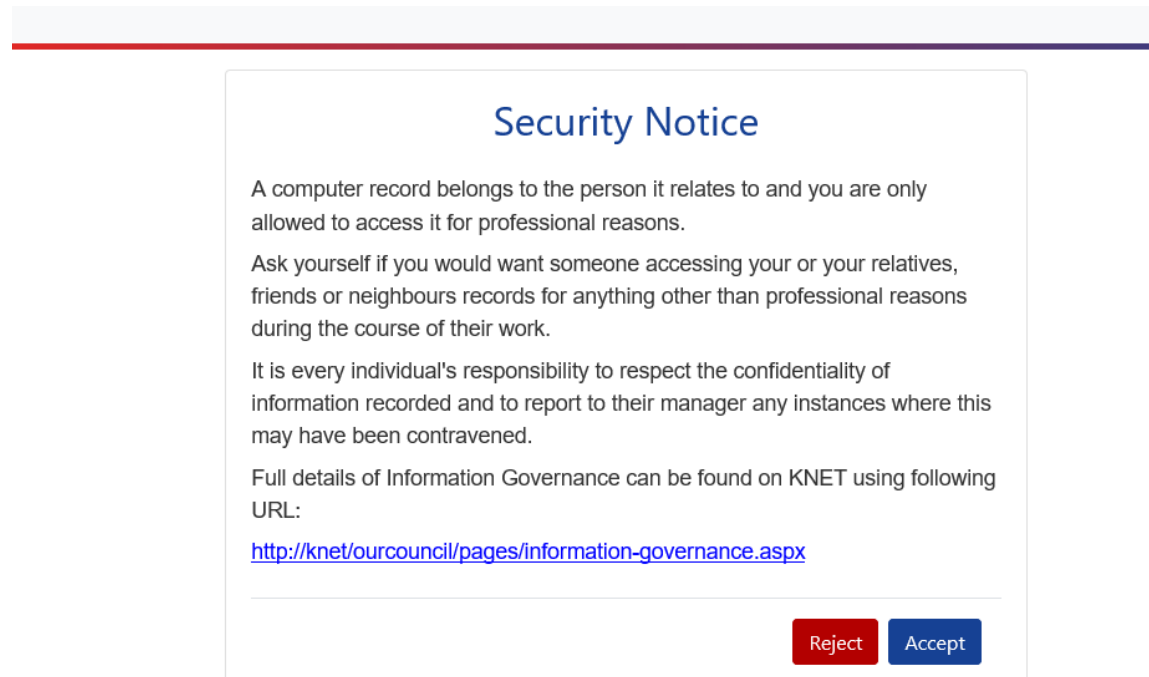
If you have locked your 'password', please telephone or email the Early Years Management Information team on 03000 421612 or miearlyyears@kent.gov.uk and we will reset this for you.

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:



The screenshot shows a white rectangular box with a thin border, centered on a light gray background. At the top of the box, the title "Security Notice" is displayed in a blue font. Below the title, there are four paragraphs of text in a standard black font. The first paragraph states that a computer record belongs to the person it relates to and is only accessible for professional reasons. The second paragraph asks the user to consider if they would want their records accessed by others. The third paragraph emphasizes the responsibility to respect confidentiality and report any breaches. The fourth paragraph provides a URL for more information on Information Governance. At the bottom right of the box, there are two buttons: a red "Reject" button and a blue "Accept" button.

Security Notice

A computer record belongs to the person it relates to and you are only allowed to access it for professional reasons.

Ask yourself if you would want someone accessing your or your relatives, friends or neighbours records for anything other than professional reasons during the course of their work.

It is every individual's responsibility to respect the confidentiality of information recorded and to report to their manager any instances where this may have been contravened.

Full details of Information Governance can be found on KNET using following URL:

<http://knet/ourcouncil/pages/information-governance.aspx>

Reject **Accept**

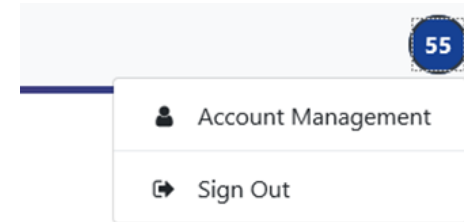
Please click on “Accept”. A message will appear saying “redirecting you”. This will take a few seconds and then the 'Home Screen' will be displayed. If you accidentally click on “Reject”, it will sign you out and you will need to log in again.

Home Screen

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

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

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



Home Forms Funding

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

Please select the Funding tab to proceed with your claim.

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

You will now see three tabs; 'Home', 'Forms' and 'Funding'. **"Forms" is a new tab, but please ignore this for submitting 3-4 year old estimate claims.**

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

Funding Deadlines

The latest PVI calendar (2020/21), 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

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.

The screenshot shows the 'Funding' section of the FIS Provider Portal. At the top, there are navigation tabs: 'Home Forms', 'Funding', 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The 'Estimates' tab is active. Below the tabs, the page title is 'Estimates Head Count Records for 2020 - 2021 - Summer'. A table is displayed with the following structure:

| | | | Office use only | |
|-------------|-----------------|---|------------------|-----------|
| | | | Ready To Process | Processed |
| 2020 - 2021 | Summer | Submission Period: 02-Mar-2021 to 16-Mar-2021 | | |
| | Spring | Submission Period: 02-Dec-2020 to 25-Mar-2021 | | |
| | 3 & 4 Year Olds | | | |

Three numbered callouts indicate the steps to open an estimate claim:

1. Click the 'Estimates' tab.
2. Select the 'Term' (2020 - 2021 Summer).
3. Select the 'Funding Type' (3 & 4 Year Olds).

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 for **all the 3-4 year old children** you are expecting to attend your setting next term, either as new children or continuing children.

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'

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

What to check once claim has been sent

A green bar will appear at the top to confirm that the submission has been successful.

The screenshot shows the 'Funding' section of the FIS Provider Portal. At the top, there is a navigation bar with 'Home Forms' and 'Funding'. Below this, a breadcrumb trail shows 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A prominent green bar with a checkmark icon and the text 'Submission Successful' is displayed. Below this, a link for 'Submit Estimate: 2020 - 2021 Summer - 3 & 4 Year Olds' is visible. The form contains two input fields: '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'. A note states 'There are 585.00 Hours in this Term' and instructs the user to 'Please enter both numbers, click 'Calculate', then 'Send Claim''. At the bottom, there are two buttons: 'Calculate' and 'Send Claim'.

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.

Hints and Tips:

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

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 what was submitted.

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 includes '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' as 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 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 miearlyyears@kent.gov.uk to have your account unlocked and your password reset.

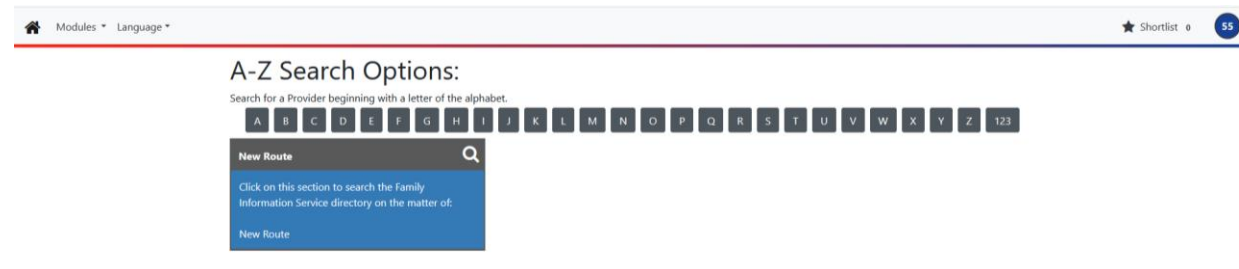
3. My password has expired.

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'



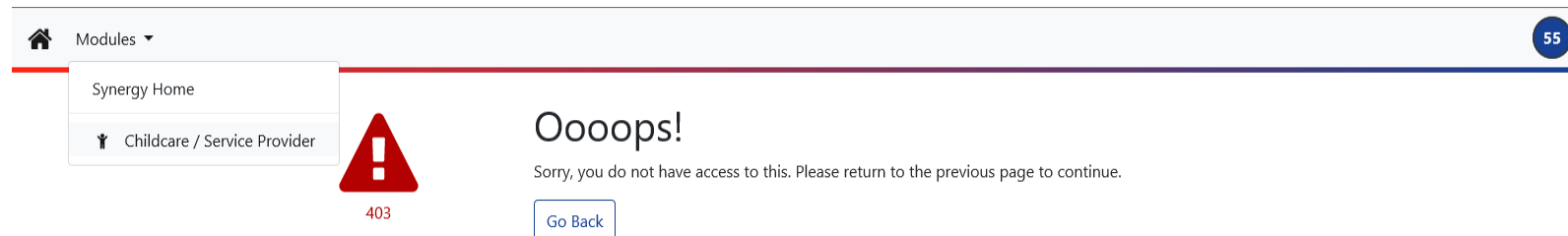
FAQs

5. I 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 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 FF2 funding?

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