

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

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This guidance contains the following –

- How to access the funding module
- How to set up your funding calendar for the claim period
- How to submit your interim claim
- How to submit your final claim
  - To check / update a child record
  - To add a child record
  - To delete a child record
  - Data check before submitting
    - ~ How to amend the Total Funded Hours per Claim Period
- Payment Record

Other Help Documents –

- [Steps to Success](#)
- [Key Points to Remember](#)
- [Calendar Closure Dates](#)

### IMPORTANT:

Please ensure your Finance Contact email address held by the Local Authority is current. All communication regarding funding will be via email.

**Should you require any further assistance please contact:**

<b>Funding Guidance</b> Early Years Finance Team	01603 222300 - Option 2 or <a href="mailto:earlyyearsfinance@norfolk.gov.uk">earlyyearsfinance@norfolk.gov.uk</a>
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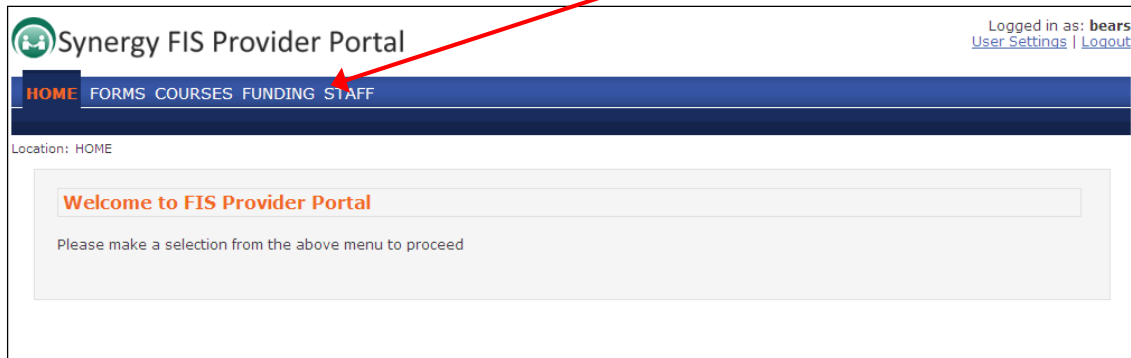


## EARLY YEARS AND CHILDCARE

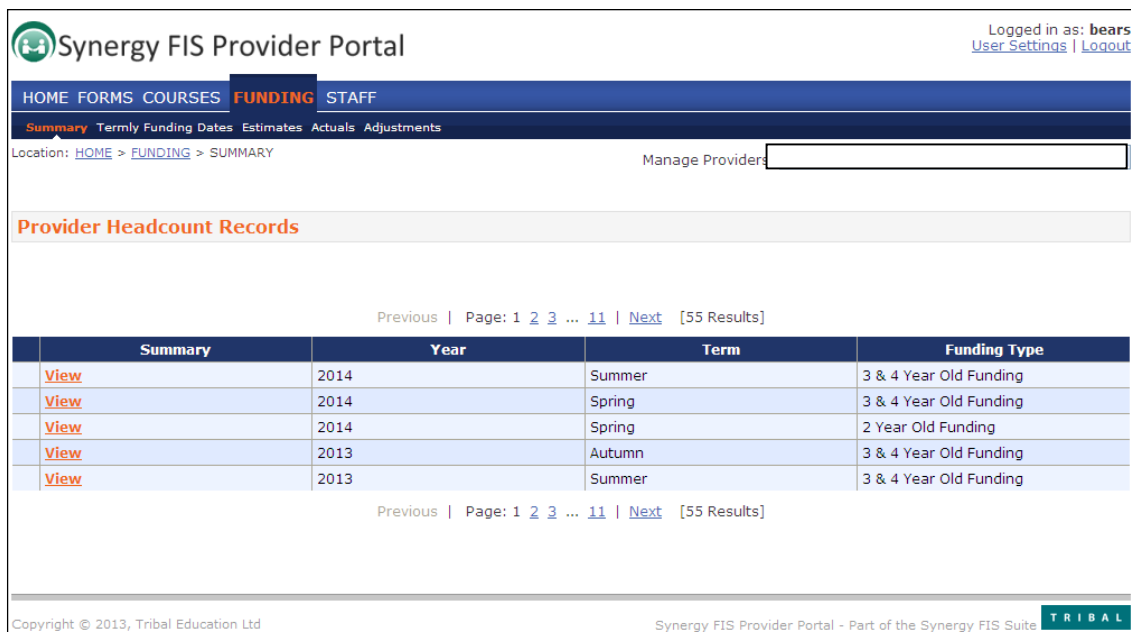
### Provider Portal – Funding Module

#### To access the funding module

Once logged in to the online system, click FUNDING



The first screen you will see is a summary of provider headcount. This is where you can select a claim period that you wish to view / update.



## EARLY YEARS AND CHILDCARE

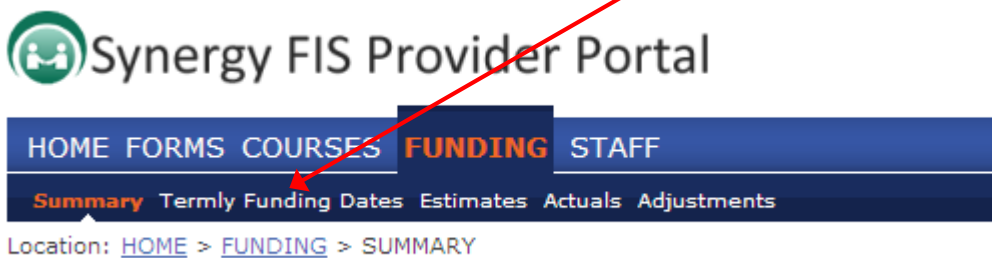
### Provider Portal – Funding Module

#### Setting up your calendar in readiness for the claim period

To enable the module to calculate the funded hours to be claimed for each child, it is necessary to insert the days which your setting will NOT be open for funded hours.

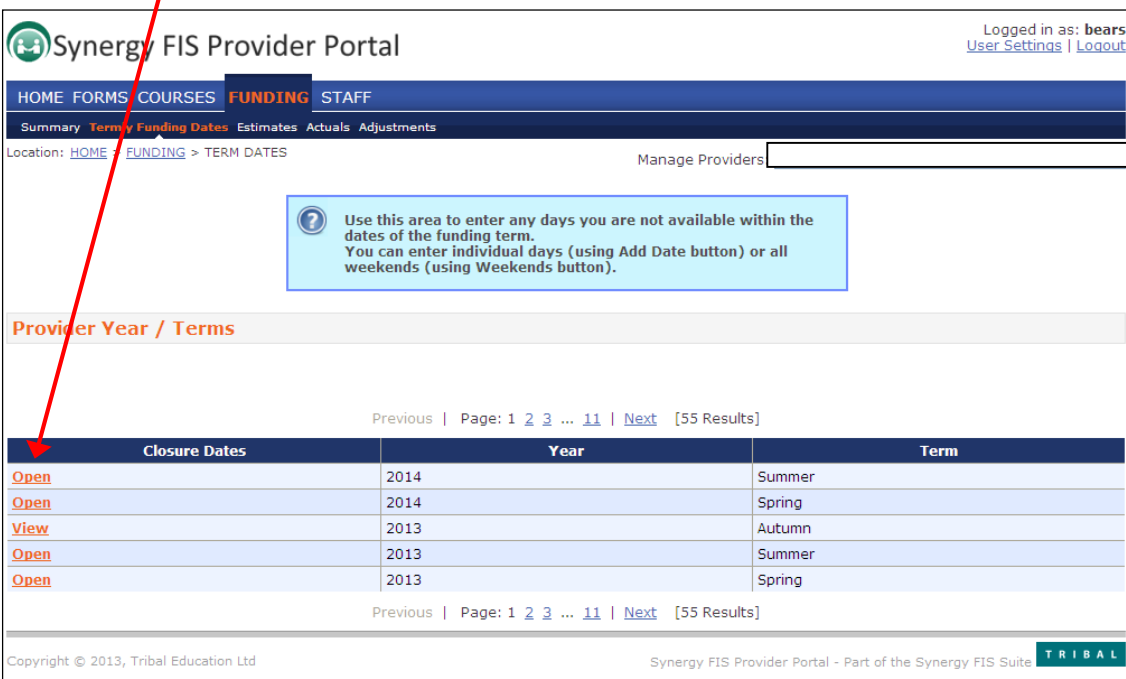
We have already populated closure dates specific to term time or all year round (ie. weekends, school/public/bank holidays and inset days). Please insert any other dates that your setting will be closed or delete those where funded hours will be offered.

#### To update / amend the calendar click TERMLY FUNDING DATES



#### To insert another CLOSURE DATE

Select OPEN for the claim period to be updated




Logged in as: **bears**  
[User Settings](#) | [Logout](#)

HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > [TERM DATES](#)

Manage Providers



Use this area to enter any days you are not available within the dates of the funding term. You can enter individual days (using Add Date button) or all weekends (using Weekends button).

**Provider Year / Terms**

Previous | Page: 1 2 3 ... 11 | Next [55 Results]

Closure Dates	Year	Term
<a href="#">Open</a>	2014	Summer
<a href="#">Open</a>	2014	Spring
<a href="#">View</a>	2013	Autumn
<a href="#">Open</a>	2013	Summer
<a href="#">Open</a>	2013	Spring

Previous | Page: 1 2 3 ... 11 | Next [55 Results]

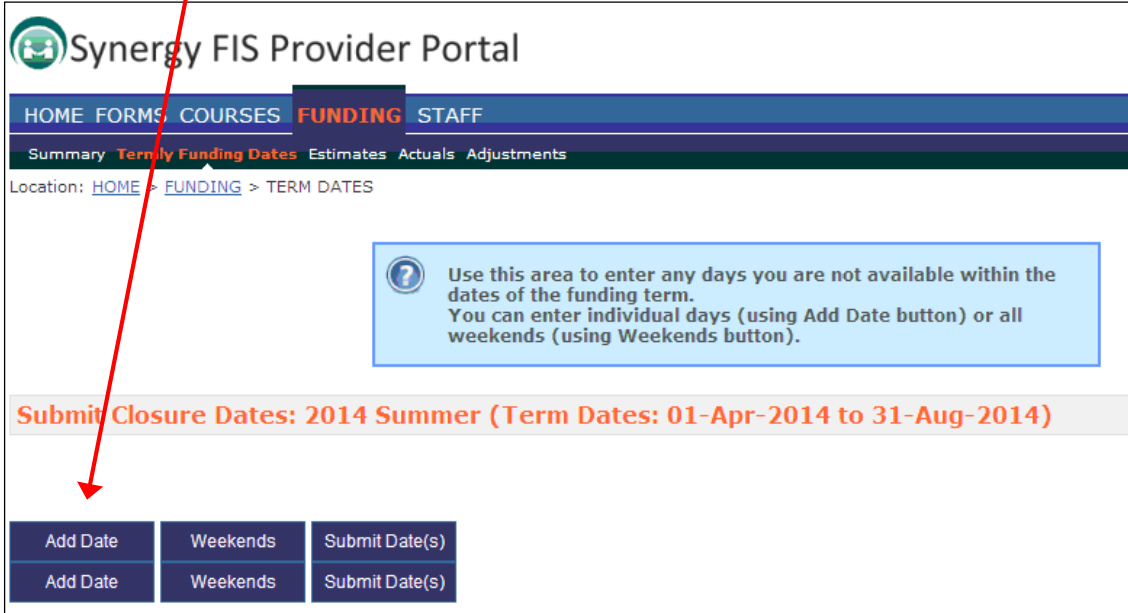
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## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Select ADD A DATE



**Synergy FIS Provider Portal**

HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

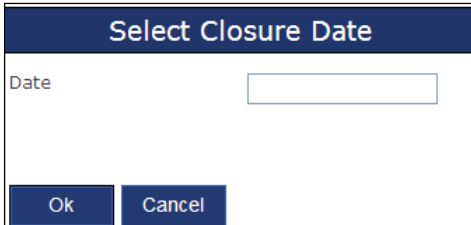
Location: [HOME](#) > [FUNDING](#) > TERM DATES

**Use this area to enter any days you are not available within the dates of the funding term. You can enter individual days (using Add Date button) or all weekends (using Weekends button).**

**Submit Closure Dates: 2014 Summer (Term Dates: 01-Apr-2014 to 31-Aug-2014)**

Buttons: Add Date, Weekends, Submit Date(s)

The following box will appear -

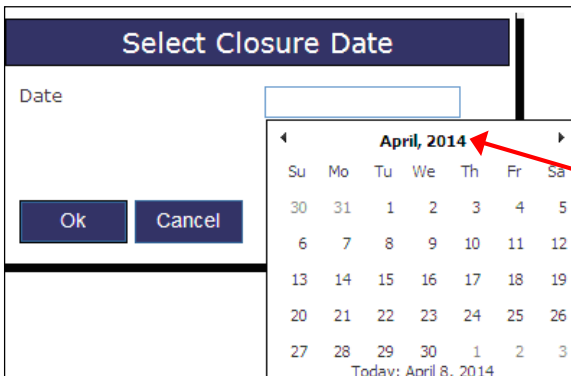


**Select Closure Date**

Date

Ok Cancel

Insert the date using the monthly calendar and click ok



**Select Closure Date**

Date

Ok Cancel

**April, 2014**

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

Today: April 8, 2014

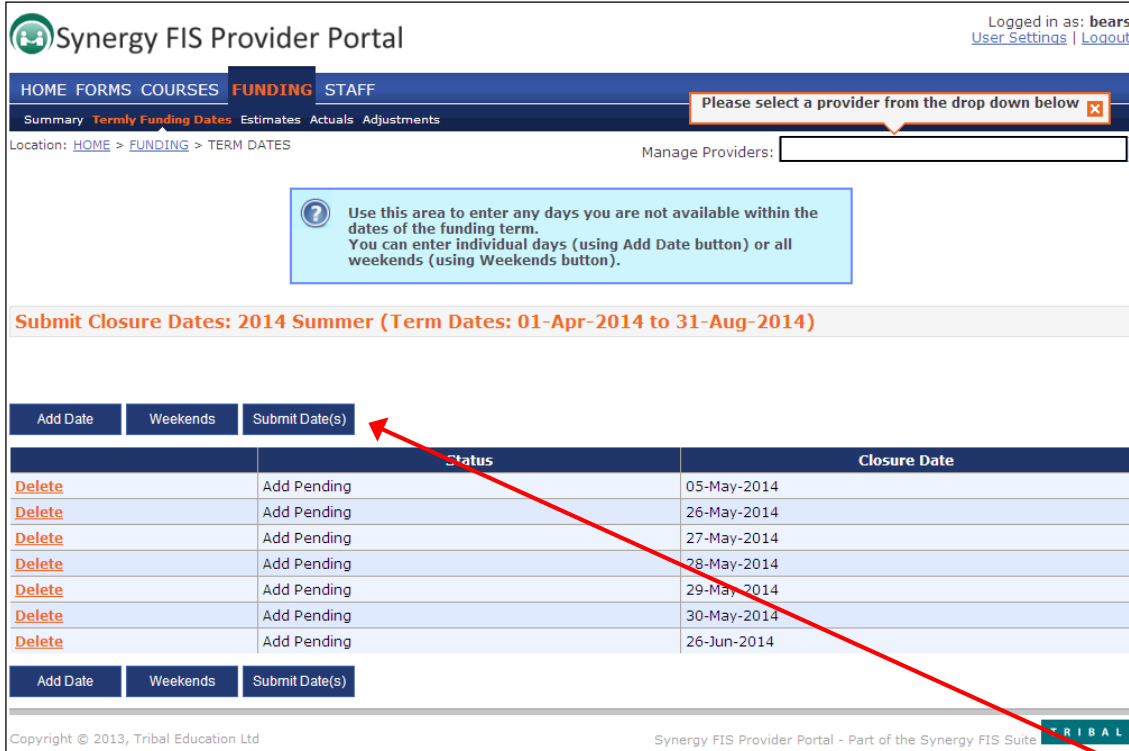
To fast track to the birth date, double click

Select relevant year, then month and finally date

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Continue to insert all your closure dates until all are listed



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HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > TERM DATES

Manage Providers:

**Submit Closure Dates: 2014 Summer (Term Dates: 01-Apr-2014 to 31-Aug-2014)**

Buttons: Add Date Weekends **Submit Date(s)**

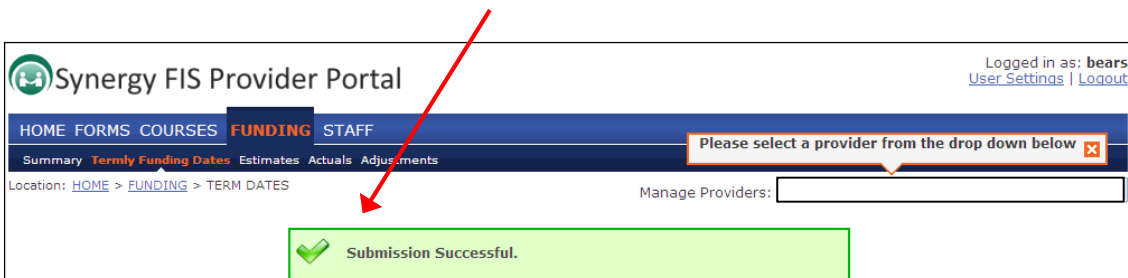
	Status	Closure Date
<a href="#">Delete</a>	Add Pending	05-May-2014
<a href="#">Delete</a>	Add Pending	26-May-2014
<a href="#">Delete</a>	Add Pending	27-May-2014
<a href="#">Delete</a>	Add Pending	28-May-2014
<a href="#">Delete</a>	Add Pending	29-May-2014
<a href="#">Delete</a>	Add Pending	30-May-2014
<a href="#">Delete</a>	Add Pending	26-Jun-2014

Buttons: Add Date Weekends Submit Date(s)

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Once all dates have been added, (the dates are listed in order) click the SUBMIT DATE(S) button, a Submission Successful message will appear



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HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

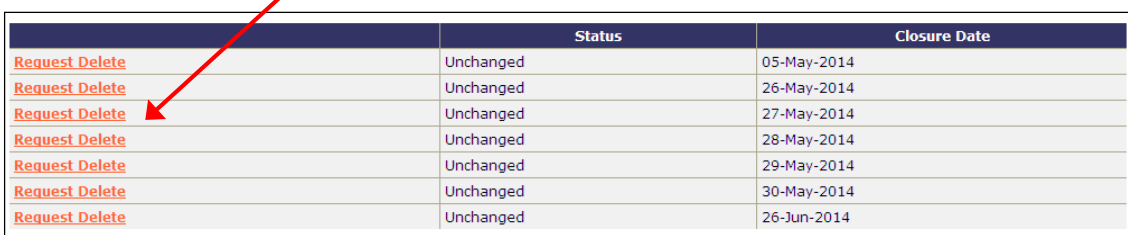
Location: [HOME](#) > [FUNDING](#) > TERM DATES

Manage Providers:

**Submission Successful.**

Your open days will automatically update the records held on the system.

The wording will also amend for each record in readiness for any future amendments.



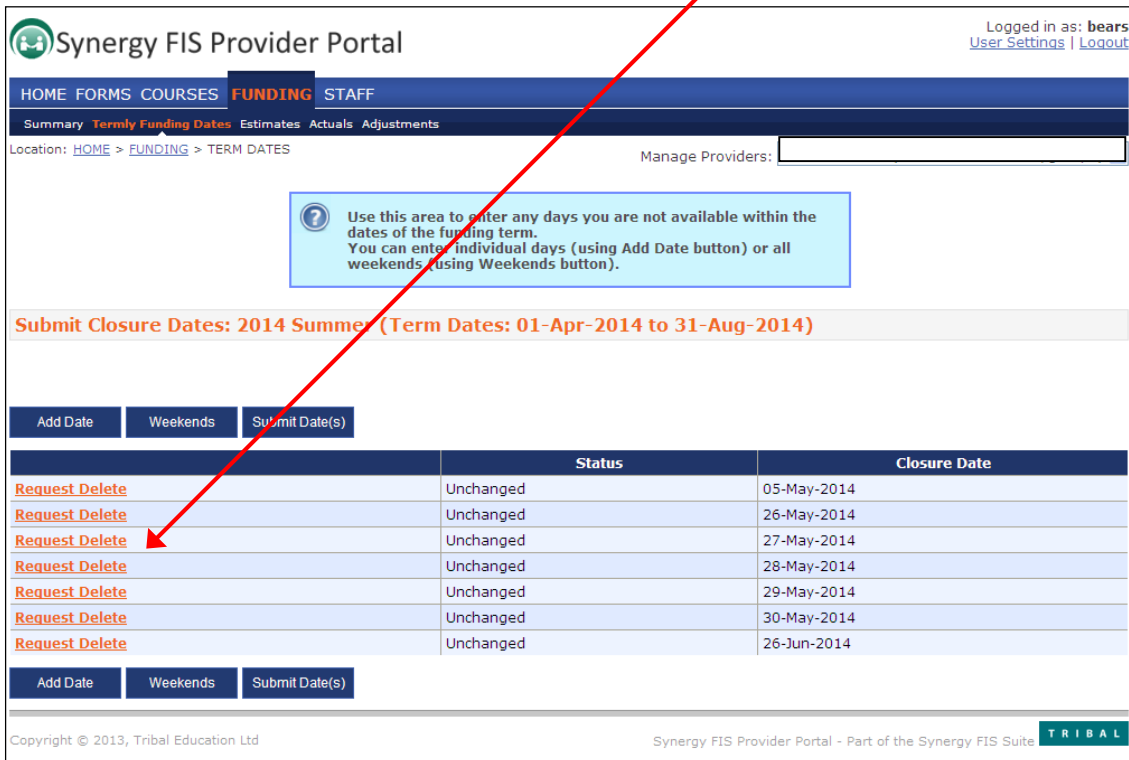
	Status	Closure Date
<a href="#">Request Delete</a>	Unchanged	05-May-2014
<a href="#">Request Delete</a>	Unchanged	26-May-2014
<a href="#">Request Delete</a>	Unchanged	27-May-2014
<a href="#">Request Delete</a>	Unchanged	28-May-2014
<a href="#">Request Delete</a>	Unchanged	29-May-2014
<a href="#">Request Delete</a>	Unchanged	30-May-2014
<a href="#">Request Delete</a>	Unchanged	26-Jun-2014

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### To delete a date from the list

Select the date to be deleted by clicking REQUEST DELETE



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HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > TERM DATES

Manage Providers:

**Submit Closure Dates: 2014 Summer (Term Dates: 01-Apr-2014 to 31-Aug-2014)**

Use this area to enter any days you are not available within the dates of the funding term. You can enter individual days (using Add Date button) or all weekends (using Weekends button).

Add Date Weekends Submit Date(s)

	Status	Closure Date
<a href="#">Request Delete</a>	Unchanged	05-May-2014
<a href="#">Request Delete</a>	Unchanged	26-May-2014
<a href="#">Request Delete</a>	Unchanged	27-May-2014
<a href="#">Request Delete</a>	Unchanged	28-May-2014
<a href="#">Request Delete</a>	Unchanged	29-May-2014
<a href="#">Request Delete</a>	Unchanged	30-May-2014
<a href="#">Request Delete</a>	Unchanged	26-Jun-2014

Add Date Weekends Submit Date(s)

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The following will message will appear



**Request Delete**

Are you sure you want to request the deletion of closure date: 05-May-2014 ?  
Delete requests are automatically submitted but can be cancelled.

[Yes](#) [No](#)

Click YES to delete or NO to cancel request

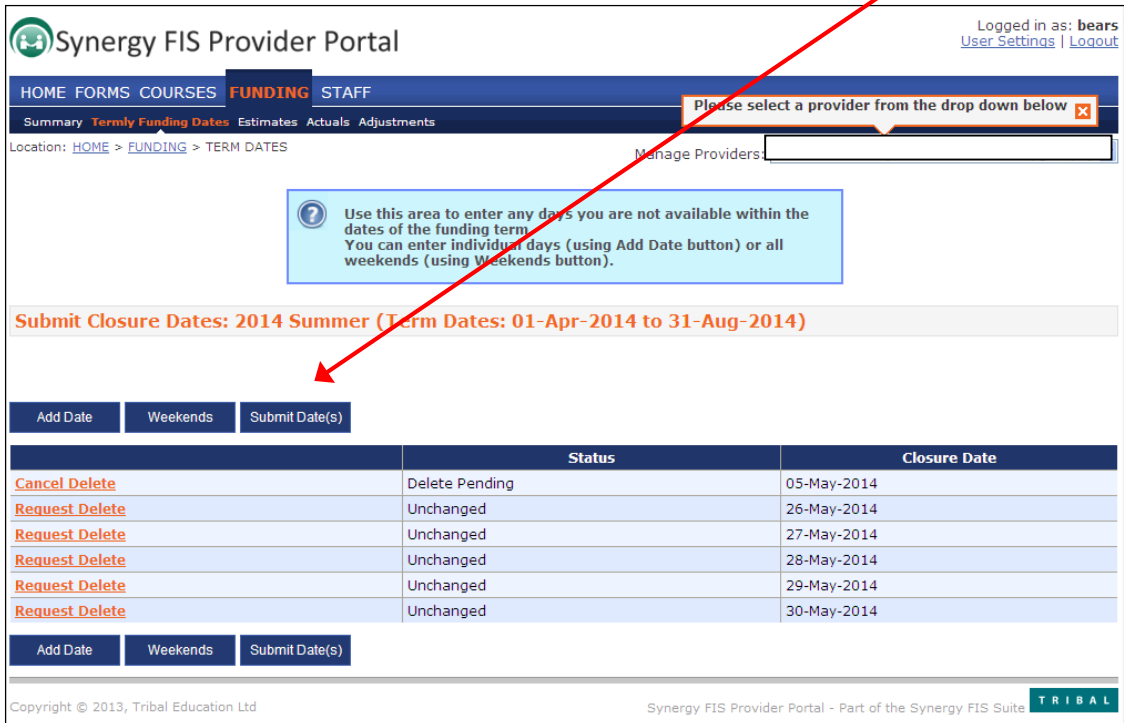
Once YES is selected the following will appear for the date to be deleted

	Status
<a href="#">Cancel Delete</a>	Delete Pending

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Once all dates have been selected for deletion, click the **SUBMIT DATE(S)** button



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HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > TERM DATES

Manage Providers:

Please select a provider from the drop down below

Use this area to enter any days you are not available within the dates of the funding term. You can enter individual days (using Add Date button) or all weekends (using Weekends button).

**Submit Closure Dates: 2014 Summer (Term Dates: 01-Apr-2014 to 31-Aug-2014)**

Add Date Weekends **Submit Date(s)**

	Status	Closure Date
<a href="#">Cancel Delete</a>	Delete Pending	05-May-2014
<a href="#">Request Delete</a>	Unchanged	26-May-2014
<a href="#">Request Delete</a>	Unchanged	27-May-2014
<a href="#">Request Delete</a>	Unchanged	28-May-2014
<a href="#">Request Delete</a>	Unchanged	29-May-2014
<a href="#">Request Delete</a>	Unchanged	30-May-2014

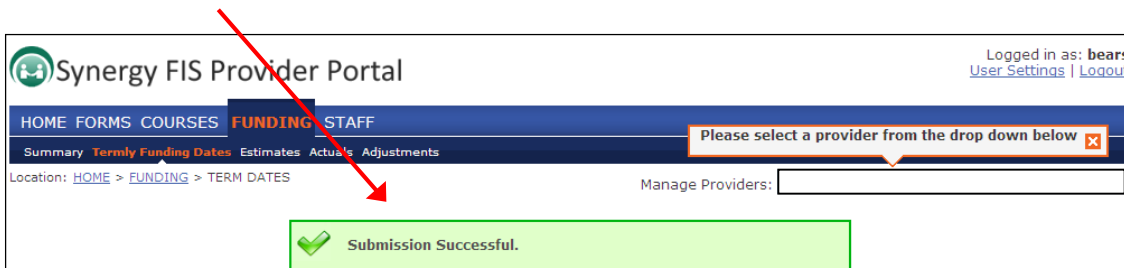
Add Date Weekends **Submit Date(s)**

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A Submission Successful message will appear



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HOME FORMS COURSES **FUNDING** STAFF

Summary **Termly Funding Dates** Estimates Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > TERM DATES

Manage Providers:

Please select a provider from the drop down below

**Submission Successful.**

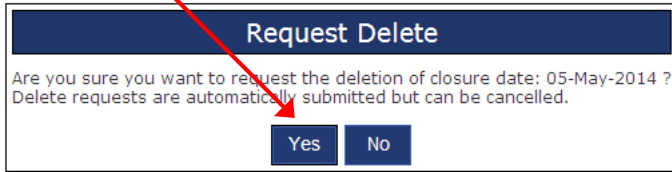
Check the dates listed are as expected

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module



**PROBLEM:** YES was selected PRIOR to clicking SUBMIT DATE(S)



**Request Delete**

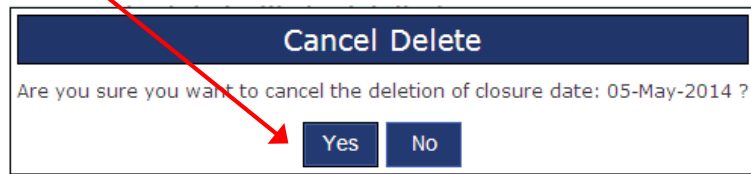
Are you sure you want to request the deletion of closure date: 05-May-2014 ?  
Delete requests are automatically submitted but can be cancelled.

Steps required to resolve problem -

- ① On the date record click CANCEL DELETE to reverse deletion request

	Status
<a href="#">Cancel Delete</a>	Delete Pending

- ② Select YES



**Cancel Delete**

Are you sure you want to cancel the deletion of closure date: 05-May-2014 ?

- ③ Check the record has updated

	Status
<a href="#">Request Delete</a>	Unchanged



**PROBLEM:** YES was selected and the amendment(s) submitted



**Request Delete**

Are you sure you want to request the deletion of closure date: 05-May-2014 ?  
Delete requests are automatically submitted but can be cancelled.

Steps required to resolve problem -

- ① Resubmit date by clicking ADD DATE  
(Refer to page 4 and 5 for guidance)



**Help Needed?** Telephone (01603) 222300 Option 2



## EARLY YEARS AND CHILDCARE

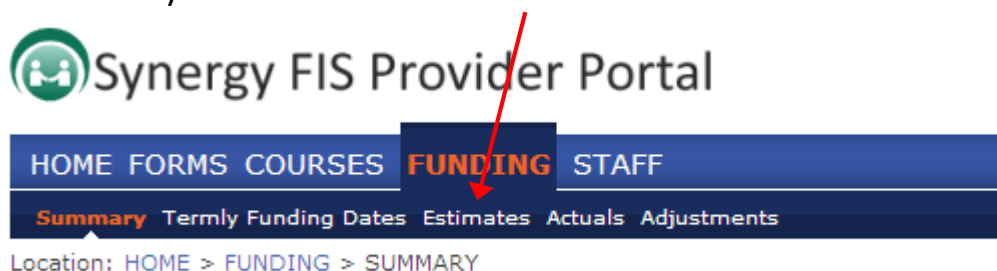
### Provider Portal – Funding Module

#### Completing your interim claim (Estimate)

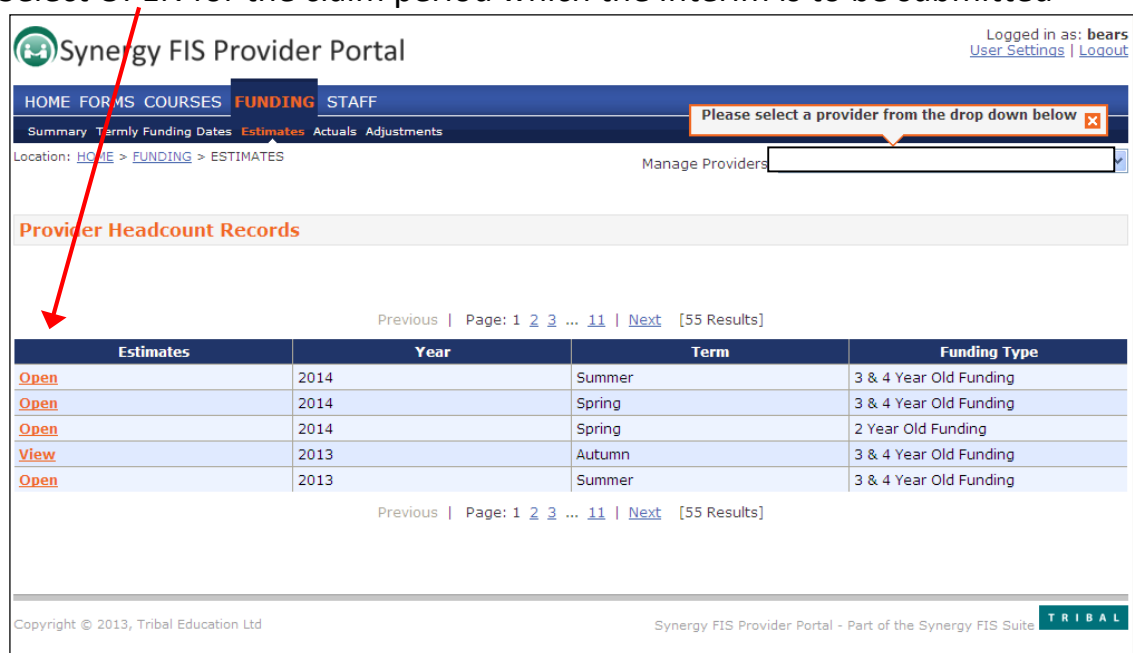
The interim claim is an estimate of the total number of funded hours which will be claimed during the claim period.

The Early Years Finance team will email your finance contact when it is necessary to submit your interim claim.

To submit your interim click ESTIMATES



Select OPEN for the claim period which the Interim is to be submitted



**PROBLEM:** The claim period that I want to update has VIEW listed?



Estimates	
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">View</a>	2013
<a href="#">Open</a>	2013

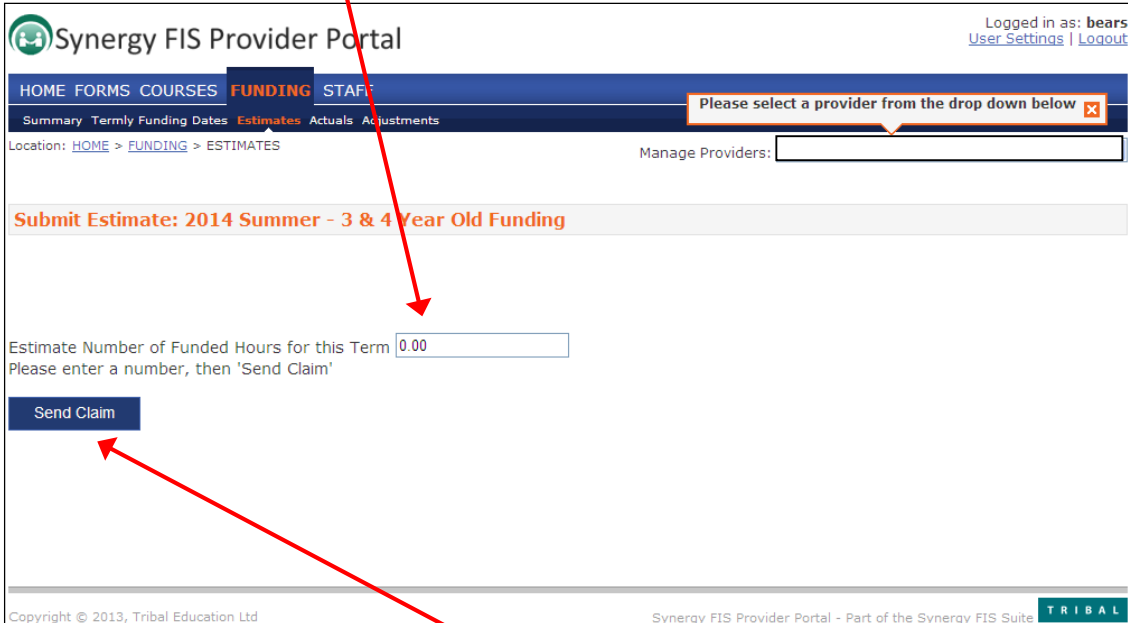
This means the claim period has been “locked”. It is only possible to view the data.

VIEW will be displayed when the Local Authority is finalising a payment or the claim period has closed.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Insert the total number of funded hours that your setting expects to claim on behalf of parent/carers (rounded to nearest 0.5)



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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates **Estimates** Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > ESTIMATES

Manage Providers:

Please select a provider from the drop down below

**Submit Estimate: 2014 Summer - 3 & 4 Year Old Funding**

Estimate Number of Funded Hours for this Term   
 Please enter a number, then 'Send Claim'

**Send Claim**

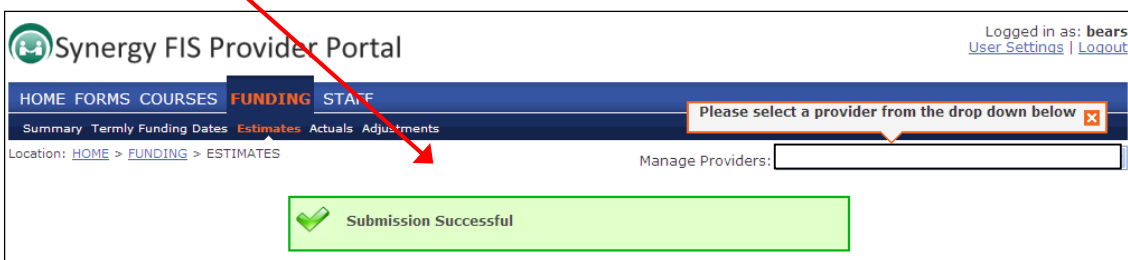
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Submit your claim by clicking SEND CLAIM

A Submission Successful message will appear



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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates **Estimates** Actuals Adjustments

Location: [HOME](#) > [FUNDING](#) > ESTIMATES

Manage Providers:

Please select a provider from the drop down below

**Submission Successful**

#### PROBLEM: The estimate is incorrect



Estimates	
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">View</a>	2013
<a href="#">Open</a>	2013

It is possible to amend the submitted estimate to rectify a mistyped figure or increase/decrease hours until VIEW is displayed.

VIEW will be displayed when the Local Authority is finalising the payment or the claim period has closed.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

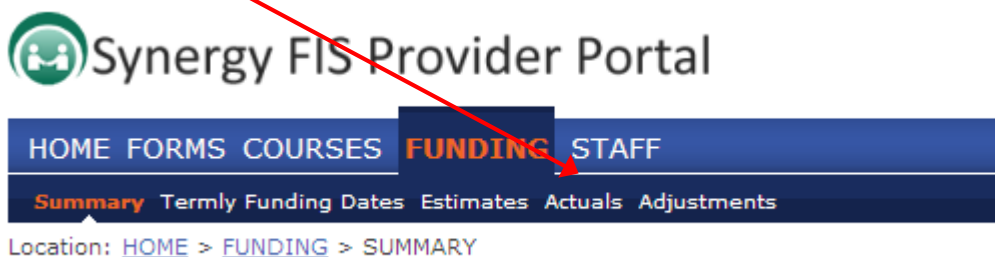
#### Completing your final claim (Actuals)

From the **first day of each claim period**, the Actuals data can be updated and submitted to the Local Authority in readiness for the headcount date. The Actuals claim is a list of all children your setting wishes to claim funding for. The data required to submit the claim is collected from the mandatory parent/carers claim forms your setting has issued and received back from parent/carers who have indicated the hours to be claimed, together with the child's data.

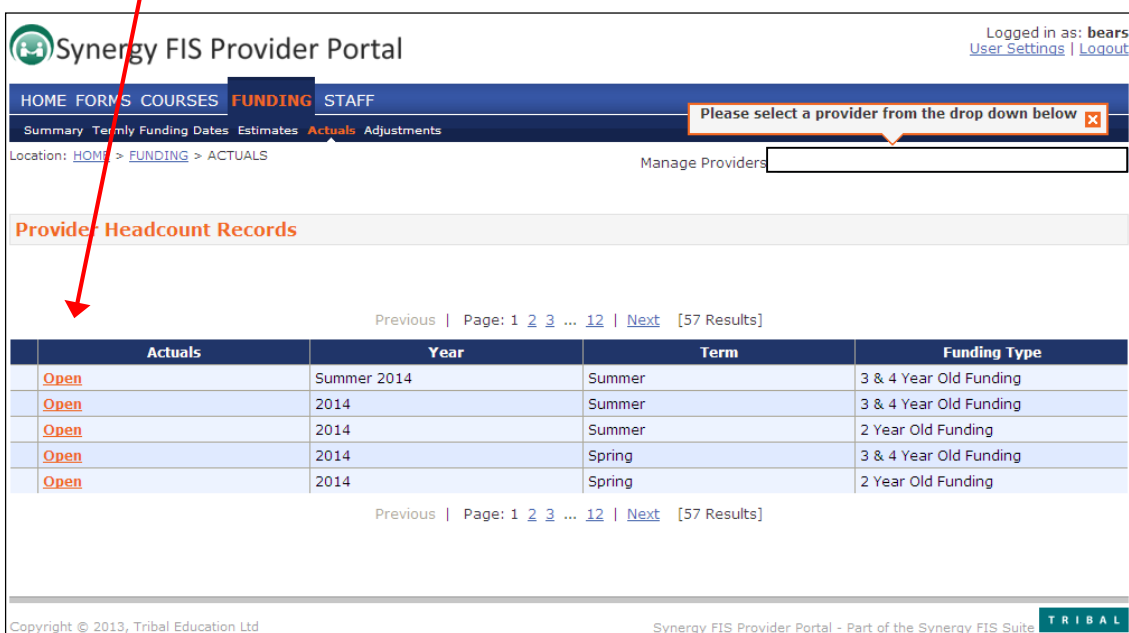
The Early Years Finance team will email your finance contact when it is necessary to submit your final claim and the timescale for this to be completed.

#### To submit your final claim

Click ACTUALS



Select OPEN for the claim period which the Final is to be submitted / updated



## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

**PROBLEM:** The claim period that I want to update has VIEW listed?

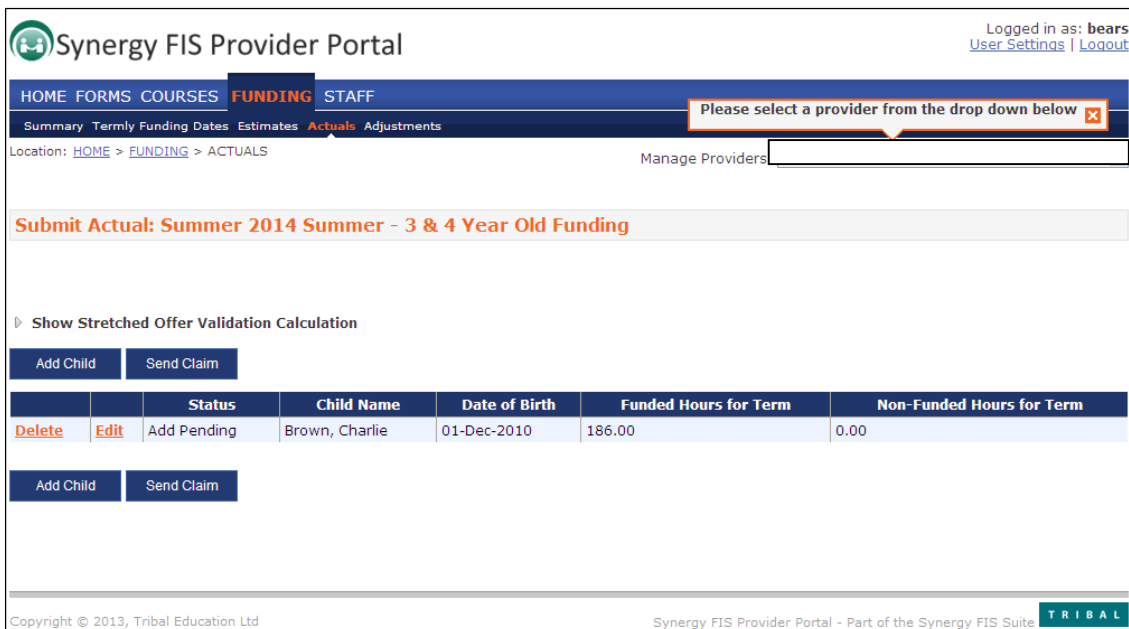


Estimates	
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">Open</a>	2014
<a href="#">View</a>	2013
<a href="#">Open</a>	2013

This means the claim period has been “locked”. It is only possible to view the data.

VIEW will be displayed when the Local Authority is finalising a payment or the claim period has closed.

Once OPEN is selected the following screen will be displayed.



Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > ACTUALS

Manage Providers

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

► Show Stretched Offer Validation Calculation

[Add Child](#) [Send Claim](#)

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a> <a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2010	186.00	0.00

[Add Child](#) [Send Claim](#)

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Children will be “rolled forward” automatically from the previous claim period if they remain eligible and will be listed, as shown above.

The hours must be re-calculated by either “ticking” the stretched hour box or adding the funded hours per week and weeks attending in term.

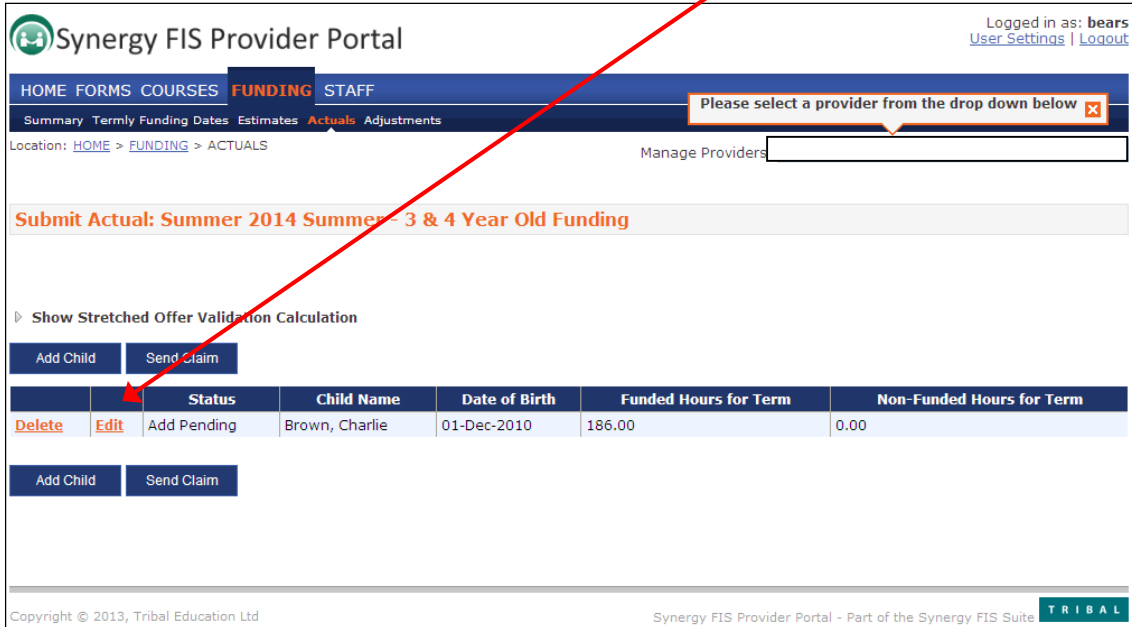
It is recommended that the details of the children already listed are checked and amended first, before adding new children.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### To CHECK / UPDATE a child record

Select the child to be checked/ updated by clicking EDIT



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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Please select a provider from the drop down below

Location: [HOME](#) > [FUNDING](#) > ACTUALS

Manage Providers

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

► Show Stretched Offer Validation Calculation

Add Child Send Claim

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Delete Edit	Add Pending	Brown, Charlie	01-Dec-2010	186.00	0.00

Add Child Send Claim

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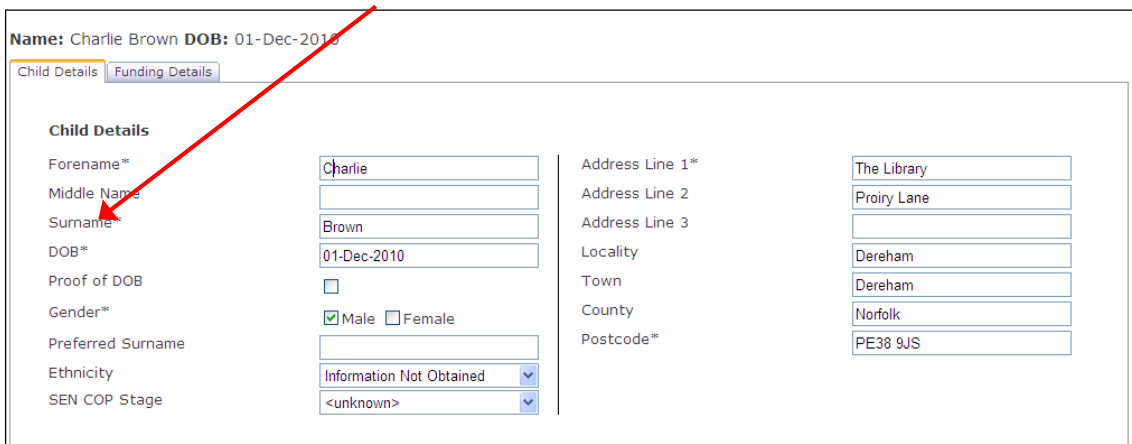
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Each child record has four tabs for you to check/update.

Child Details **Funding Details** Parent / Carer Details Notes

#### Click on the first - CHILD DETAILS



Name: Charlie Brown DOB: 01-Dec-2010

Child Details **Funding Details**

**Child Details**

Forename\* Charlie

Middle Name

Surname\* Brown

DOB\* 01-Dec-2010

Proof of DOB ☐

Gender\* ☒ Male ☐ Female

Preferred Surname

Ethnicity Information Not Obtained

SEN COP Stage <unknown>

Address Line 1\* The Library

Address Line 2 Proiry Lane

Address Line 3

Locality Dereham

Town Dereham

County Norfolk

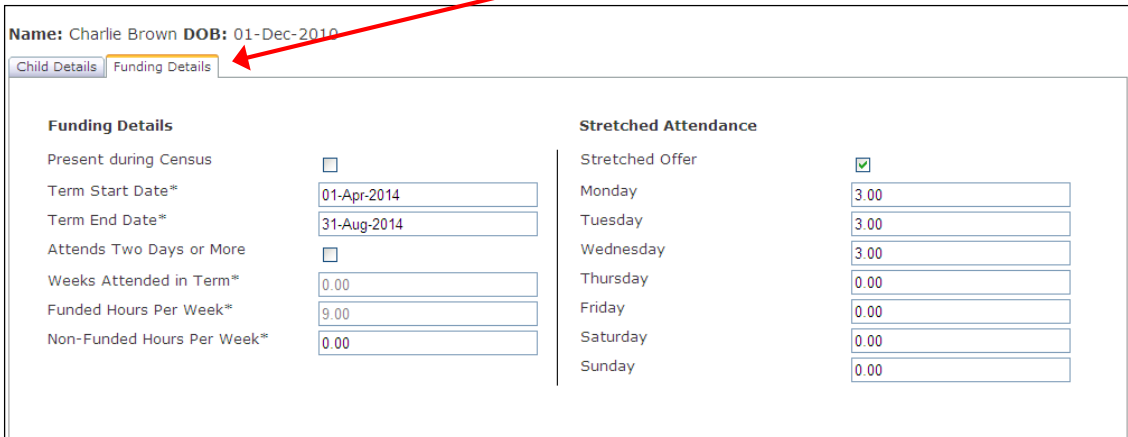
Postcode\* PE38 9JS

Check the details and amend where necessary by clicking in the field and overtyping.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Click on the second tab which displays FUNDING DETAILS



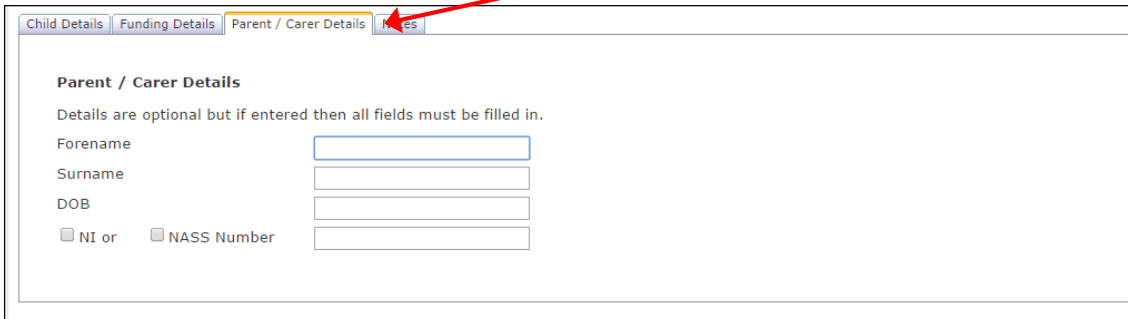
**Name:** Charlie Brown **DOB:** 01-Dec-2010

**Child Details** **Funding Details**

Funding Details		Stretched Attendance	
Present during Census	<input type="checkbox"/>	Stretched Offer	<input checked="" type="checkbox"/>
Term Start Date*	01-Apr-2014	Monday	3.00
Term End Date*	31-Aug-2014	Tuesday	3.00
Attends Two Days or More	<input type="checkbox"/>	Wednesday	3.00
Weeks Attended in Term*	0.00	Thursday	0.00
Funded Hours Per Week*	9.00	Friday	0.00
Non-Funded Hours Per Week*	0.00	Saturday	0.00
		Sunday	0.00

Check the details and amend where necessary by clicking in the field and overtyping.

Click on the third tab which displays PARENT / CARER DETAILS



**Child Details** **Funding Details** **Parent / Carer Details** **Notes**

**Parent / Carer Details**

Details are optional but if entered then all fields must be filled in.

Forename

Surname

DOB

☐ NI or ☐ NASS Number

This tab collects the information required for the Local Authority to complete an eligible check for Early Years Pupil Premium where the family perhaps meets the economic criteria.

This data is initially collected via the 3 and 4 year old parent/carers claim form.

For those children meeting the following criteria –

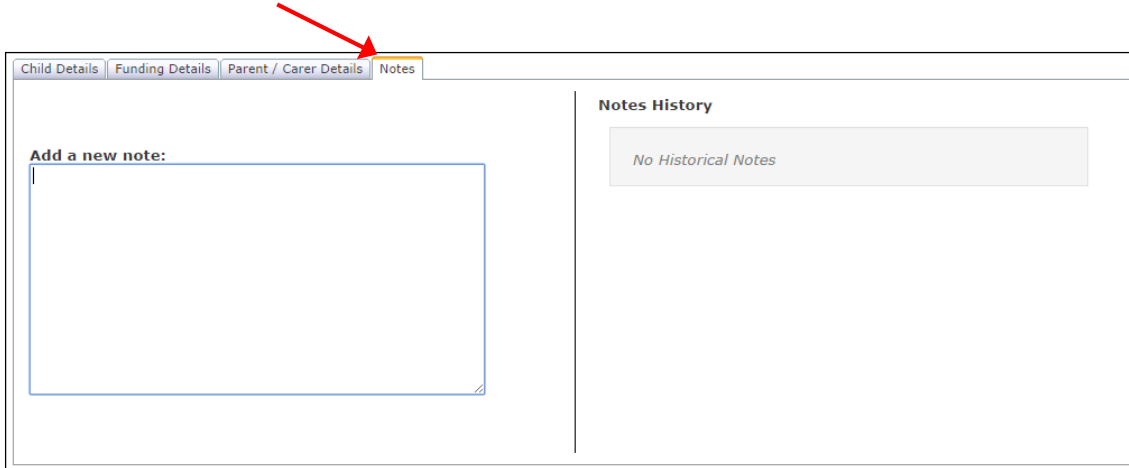
- they are currently being looked after by a local authority in England or Wales
- they have left care in England or Wales through:
  - an adoption
  - a special guardianship order
  - a child arrangement order

These details should be noted on the FOURTH tab

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### The final tab - NOTES



This tab enables the provider to notify the Finance team about the funding calculation for the child and other specific details.

It is ONLY mandatory to use this field to provide the following information –

- 2 year old eligibility NCC reference number
- EYPP criteria
- 2<sup>nd</sup> parent/carers details for an EYPP check

Where possible, please use the following format

2 year NCC number	EYPP Criteria	2 <sup>nd</sup> EYPP check
<p>Add a new note:</p> <p>FIS14-9999</p>	<p>Add a new note:</p> <p>EYPP – LAC</p>	<p>Add a new note:</p> <p>EYPP SR1234568P 01/12/70 RUSHBROOK</p>

#### Other examples of Notes –

<p>Add a new note:</p> <p>Increased hours from 9 to 15 hrs from 02/11/15</p>	<p>Add a new note:</p> <p>Funding shared 150 claimed as agreed on signed claim form 50 to be claimed by childminder (A Smith)</p>	<p>Add a new note:</p> <p>Pattern of funding alters fortnightly 1wk – 12hrs (6hrs M&amp;T) 2wk – 15hrs (6hrs M&amp;T &amp; 3hrs F)</p>
--	---	--

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

---

Once all the details have been checked and amended click SAVE

If no changes are required click CANCEL

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	*denotes mandatory fields
-------------------------------------	---------------------------------------	---------------------------



**PROBLEM:** This error message has appeared



**Save Record Failed Due To The Errors Listed Below**

This message indicates that there is a problem with the details inserted for the child. These errors will be displayed at the bottom of the screen. eg.

The following errors need to be fixed before the record can be saved:

DOB: The DOB entered is outside the range eligible to receive funding (Child Details Tab)

It is necessary to correct the details before the record can be saved.



## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

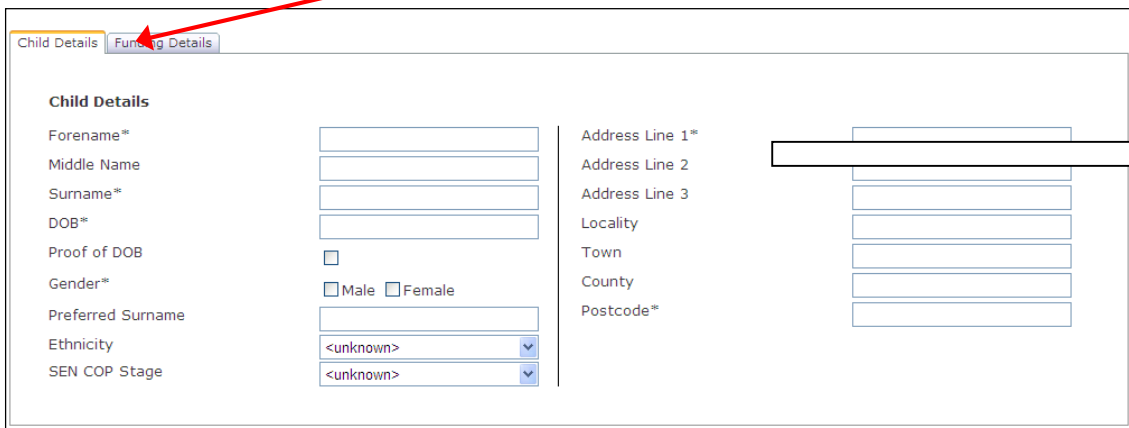
#### To ADD a child record

##### Select ADD CHILD



The screenshot shows the Synergy FIS Provider Portal interface. The user is logged in as 'bears'. The 'FUNDING' tab is selected in the top navigation bar. A message box says 'Please select a provider from the drop down below'. Below this, there is a 'Manage Providers' dropdown menu. The main content area shows 'Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding'. There is a link to 'Show Stretched Offer Validation Calculation'. Below this, there are two buttons: 'Add Child' and 'Send Claim'. A table below shows a list of child records with columns: Delete, Edit, Status, Child Name, Date of Birth, Funded Hours for Term, and Non-Funded Hours for Term. The first row shows 'Add Pending', 'Brown, Charlie', '01-Dec-2010', '186.00', and '0.00'.

##### A new record will open – CHILD DETAILS



The screenshot shows the 'Child Details' form. The 'Child Details' tab is selected. The form contains the following fields:

- Forename\*
- Middle Name
- Surname\*
- DOB\*
- Proof of DOB ☐
- Gender\* ☐ Male ☐ Female
- Preferred Surname
- Ethnicity <unknown>
- SEN COP Stage <unknown>
- Address Line 1\*
- Address Line 2
- Address Line 3
- Locality
- Town
- County
- Postcode\*

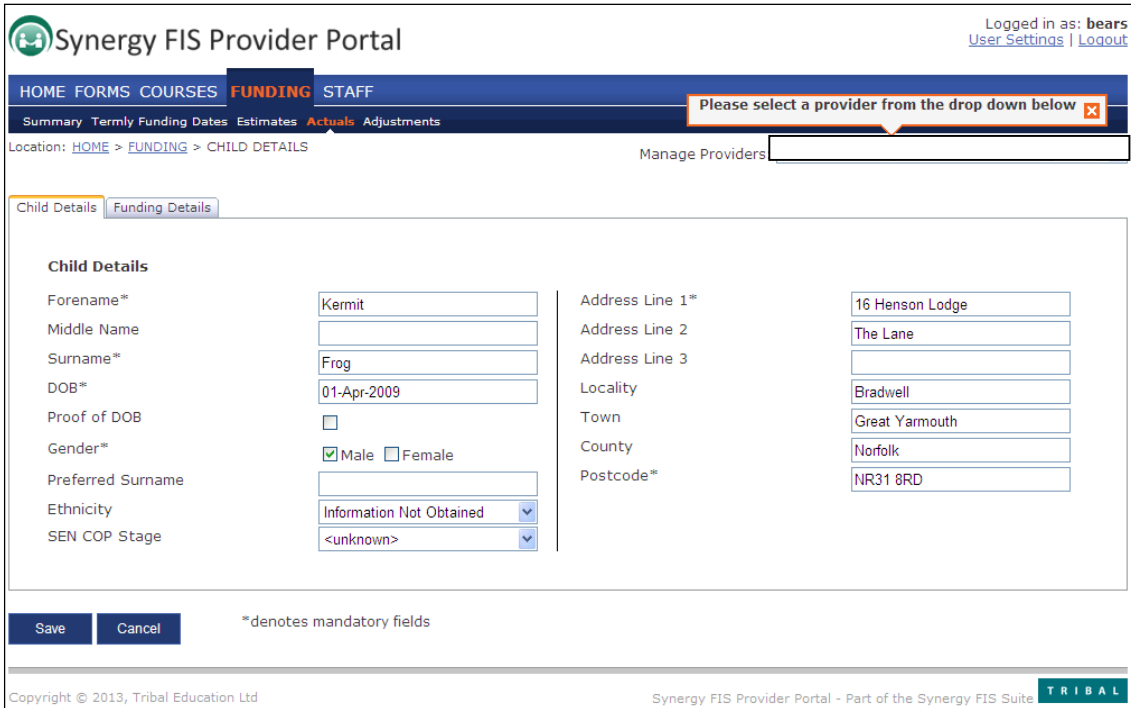
Using the parent / carer claim form insert the child's details into the record

Please ensure all mandatory fields (marked with a \*) are completed, together with the following

- Middle Name
- Preferred Surname
- Ethnicity
- Full Address

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module



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HOME FORMS COURSES **FUNDING** STAFF  
 Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > CHILD DETAILS Manage Providers

Child Details Funding Details

**Child Details**

Forename*	<input type="text" value="Kermit"/>	Address Line 1*	<input type="text" value="16 Henson Lodge"/>
Middle Name	<input type="text"/>	Address Line 2	<input type="text" value="The Lane"/>
Surname*	<input type="text" value="Frog"/>	Address Line 3	<input type="text"/>
DOB*	<input type="text" value="01-Apr-2009"/>	Locality	<input type="text" value="Bradwell"/>
Proof of DOB	<input type="checkbox"/>	Town	<input type="text" value="Great Yarmouth"/>
Gender*	<input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	County	<input type="text" value="Norfolk"/>
Preferred Surname	<input type="text"/>	Postcode*	<input type="text" value="NR31 8RD"/>
Ethnicity	<input type="text" value="Information Not Obtained"/>		
SEN COP Stage	<input type="text" value="&lt;unknown&gt;"/>		

Save Cancel \*denotes mandatory fields

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#### POINTS TO NOTE:

- The format for the Date of Birth (DOB\*) is ddmmmyyyy eg. 01APR2010 (refer to page 4 for date entry)
- Ethnicity – unless known please select INFORMATION NOT OBTAINED
- The full address is required to prevent queries when the claim is submitted
- Do not select SAVE yet

Once all the required fields are complete, select Funding Details



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HOME FORMS COURSES **FUNDING** STAFF  
 Summary Termly Funding Dates Estimates **Actuals** Adjustments

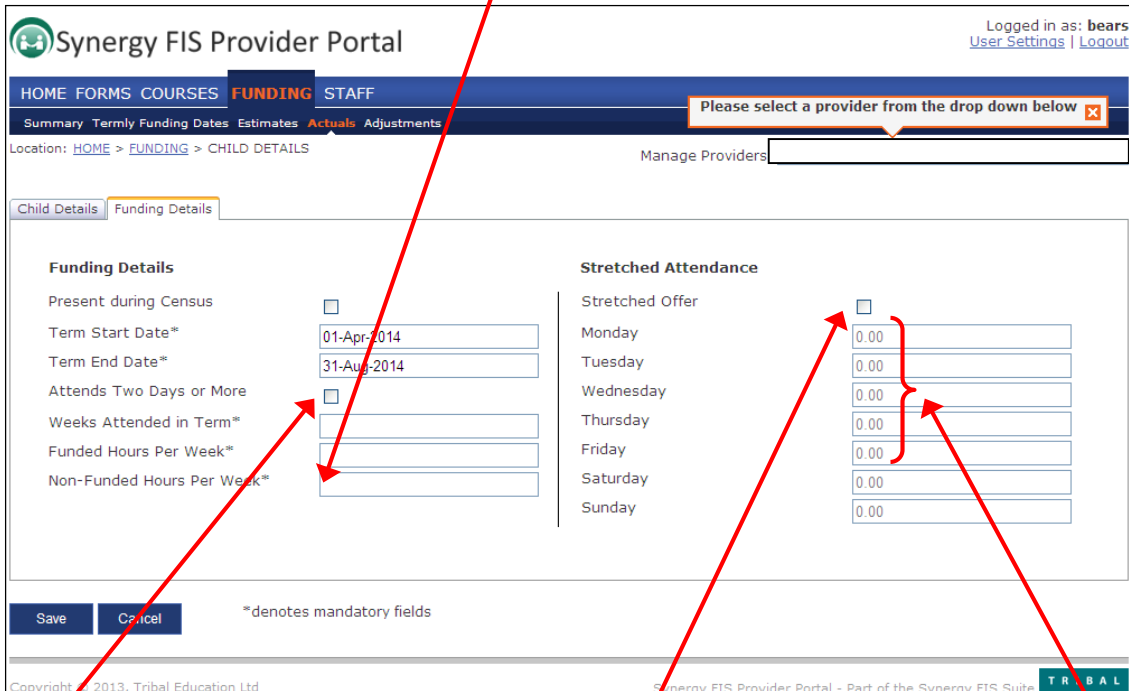
Location: [HOME](#) > [FUNDING](#) > CHILD DETAILS Manage Providers

Child Details **Funding Details**

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Insert number of Non-Funded Hours Per Week



**Synergy FIS Provider Portal**

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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > CHILD DETAILS

Manage Providers:

Child Details Funding Details

**Funding Details**

Present during Census ☐

Term Start Date\*

Term End Date\*

Attends Two Days or More ☐

Weeks Attended in Term\*

Funded Hours Per Week\*

Non-Funded Hours Per Week\*

**Stretched Attendance**

Stretched Offer ☐

Monday	<input type="text" value="0.00"/>
Tuesday	<input type="text" value="0.00"/>
Wednesday	<input type="text" value="0.00"/>
Thursday	<input type="text" value="0.00"/>
Friday	<input type="text" value="0.00"/>
Saturday	<input type="text" value="0.00"/>
Sunday	<input type="text" value="0.00"/>

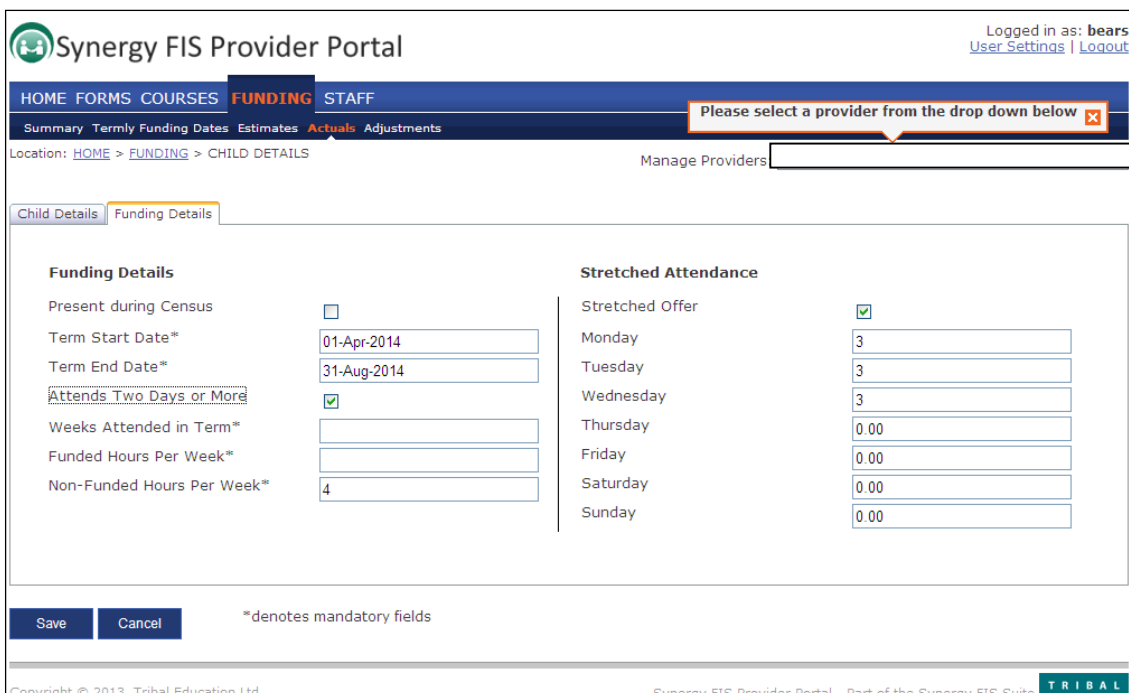
Save Cancel \*denotes mandatory fields

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Click Attends Two Days or More if applicable

Click Stretched Offer to insert a tick ☒

and insert the number of hours to be funded each day



**Synergy FIS Provider Portal**

Logged in as: bears  
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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > CHILD DETAILS

Manage Providers:

Child Details Funding Details

**Funding Details**

Present during Census ☐

Term Start Date\*

Term End Date\*

Attends Two Days or More ☒

Weeks Attended in Term\*

Funded Hours Per Week\*

Non-Funded Hours Per Week\*

**Stretched Attendance**

Stretched Offer ☒

Monday	<input type="text" value="3"/>
Tuesday	<input type="text" value="3"/>
Wednesday	<input type="text" value="3"/>
Thursday	<input type="text" value="0.00"/>
Friday	<input type="text" value="0.00"/>
Saturday	<input type="text" value="0.00"/>
Sunday	<input type="text" value="0.00"/>

Save Cancel \*denotes mandatory fields

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## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

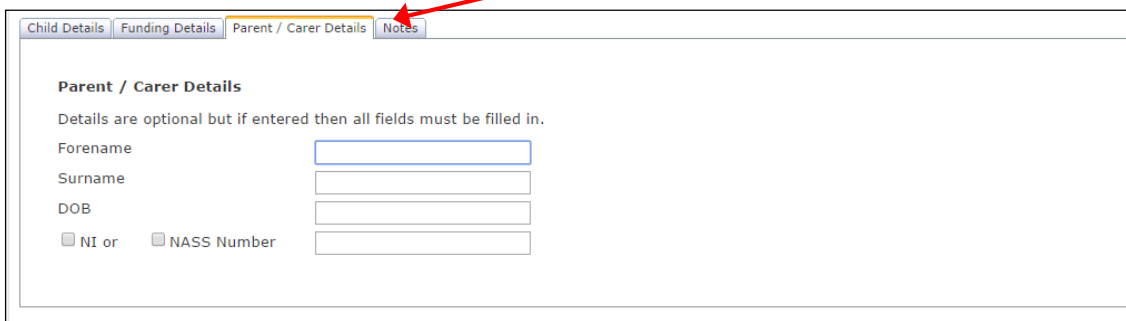
---



#### POINTS TO NOTE:

- Term Start Date – Amend to the date funding will be claimed from
- Term End Date – Amend to the last date of attendance in the claim period (This should include any notice period where applicable)
- If Stretched Offer is ticked, it is not necessary to insert  
~ Weeks Attended in Term \*  
~ Funded Hours Per Week \*
- Hours per day and Funded Hours Per Week will be validated. If these do not meet the criteria an error message will appear
- If the claim period is SPRING, please tick Present During Census
- Non-funded Hours refer to any hours over and above the funded hours and must be inserted
- It is not possible to exceed the maximum number of Weeks Attended in Term
- Records will appear in alphabetical order as new children are added to your claim

Click on the third tab which displays PARENT / CARER DETAILS



The screenshot shows a web interface with four tabs: 'Child Details', 'Funding Details', 'Parent / Carer Details', and 'Notes'. The 'Parent / Carer Details' tab is selected and highlighted. Below the tabs, the form is titled 'Parent / Carer Details' and includes a note: 'Details are optional but if entered then all fields must be filled in.' The form contains the following fields: 'Forename', 'Surname', 'DOB', and a checkbox for 'NI or NASS Number' followed by a text input field. A red arrow points to the 'Parent / Carer Details' tab.

This tab collects the information required for the Local Authority to complete an eligible check for Early Years Pupil Premium where the family perhaps meets the economic criteria.

This data is initially collected via the 3 and 4 year old parent/carers claim form.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

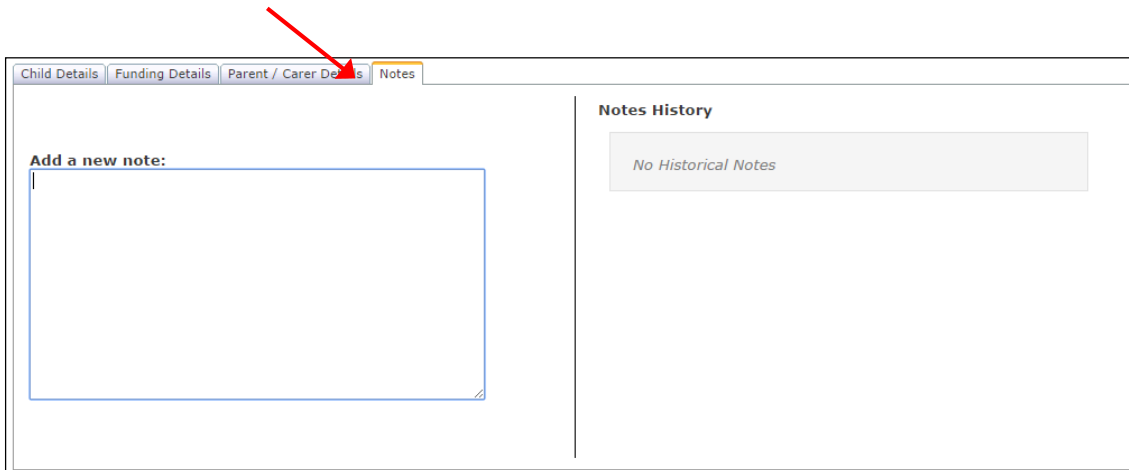
---

For those children meeting the following criteria –

- they are currently being looked after by a local authority in England or Wales
- they have left care in England or Wales through:
  - an adoption
  - a special guardianship order
  - a child arrangement order

These details should be noted on the **FOURTH** tab

The final tab - **NOTES**



The screenshot shows a web interface with four tabs: 'Child Details', 'Funding Details', 'Parent / Carer Details', and 'Notes'. A red arrow points to the 'Notes' tab. The 'Notes' tab is active, displaying a large text area for adding a new note and a 'Notes History' section on the right which currently shows 'No Historical Notes'.

This tab enables the provider to notify the Finance team about the funding calculation for the child and other specific details.

It is **ONLY** mandatory to use this field to provide the following information –

- 2 year old eligibility NCC reference number
- EYPP criteria
- 2<sup>nd</sup> parent/carer details for an EYPP check

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Where possible, please use the following format

2 year NCC number	EYPP Criteria	2 <sup>nd</sup> EYPP check
<p>Add a new note:</p> <p>FIS14-9999</p>	<p>Add a new note:</p> <p>EYPP – LAC</p>	<p>Add a new note:</p> <p>EYPP SR1234568P 01/12/70 RUSHBROOK</p>

### Other examples of Notes –

<p>Add a new note:</p> <p>Increased hours from 9 to 15 hrs from 02/11/15</p>	<p>Add a new note:</p> <p>Funding shared 150 claimed as agreed on signed claim form 50 to be claimed by childminder (A Smith)</p>	<p>Add a new note:</p> <p>Pattern of funding alters fortnightly 1wk – 12hrs (6hrs M&amp;T) 2wk – 15hrs (6hrs M&amp;T &amp; 3hrs F)</p>
--	---	--

Once the NEW child record is complete, check the details and then click SAVE

Save

Cancel

\*denotes mandatory fields



**PROBLEM:** This error message has appeared



**Save Record Failed Due To The Errors Listed Below**

This message indicates that there is a problem with the details inserted for the child. These errors will be displayed at the bottom of the screen. eg.

The following errors need to be fixed before the record can be saved:


DOB: The DOB entered is outside the range eligible to receive funding (Child Details Tab)

It is necessary to correct the details before the record can be saved.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

If the details inserted are correct the following screen will appear


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[Summary](#) [Termly Funding Dates](#) [Estimates](#) **[Actuals](#)** [Adjustments](#)

Location: [HOME](#) > [FUNDING](#) > ACTUALS
Manage Providers

Please select a provider from the drop down below


**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

Show Stretched Offer Validation Calculation

Add Child Send Claim

		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Doo, Scooby	12-Nov-2010	225.00	0.00
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Frog, Kermit	01-Apr-2009	186.00	0.00

Add Child Send Claim

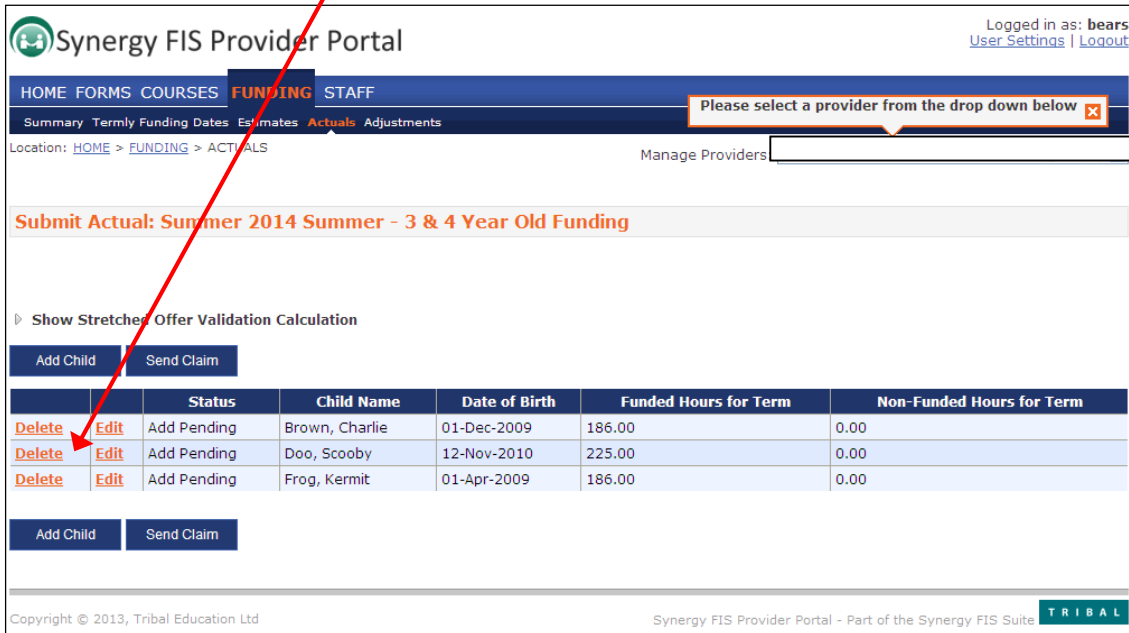
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## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### To DELETE a child record

Select record to be deleted (if the child's record has already been submitted the Status will be worded Request Delete)



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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: HOME > FUNDING > ACTUALS Manage Providers

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

► Show Stretched Offer Validation Calculation

Add Child Send Claim

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a> <a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
<a href="#">Delete</a> <a href="#">Edit</a>	Add Pending	Doo, Scooby	12-Nov-2010	225.00	0.00
<a href="#">Delete</a> <a href="#">Edit</a>	Add Pending	Frog, Kermit	01-Apr-2009	186.00	0.00

Add Child Send Claim

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The following message will appear



**Confirm Delete**

Are you sure you want to delete child: Frog, Kermit from this headcount record?

[Yes](#) [No](#)

Click YES

The record will be completely removed if the claim is yet to be submitted. If the record had already been submitted the status will change to REQUEST DELETE

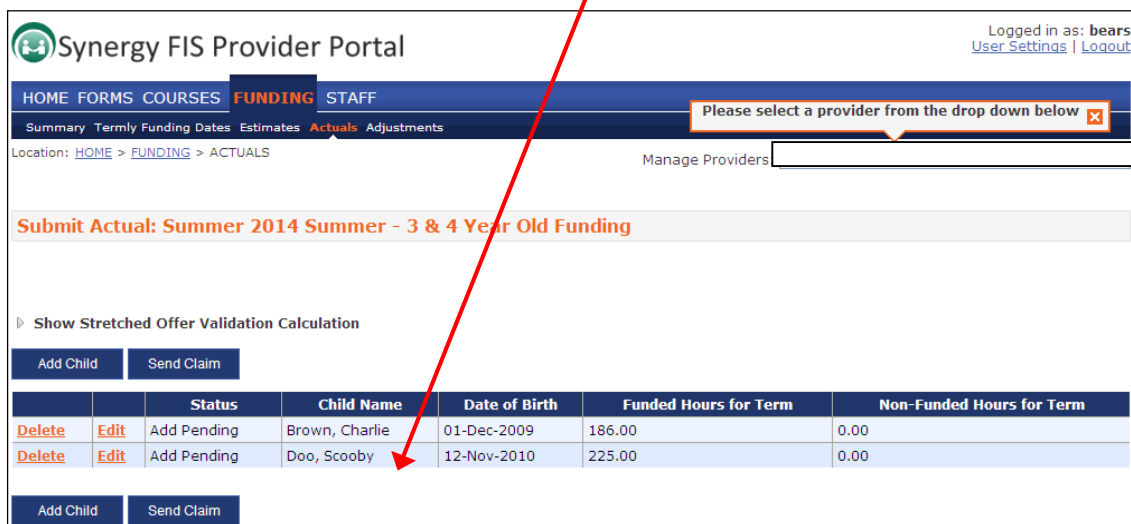


## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### Data Check BEFORE submitting Final Claim

Before submitting the claim, it is necessary to check each child record, to ensure the total number of funded hours calculated matches the Parent/Carer claim form.



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Summary Termly Funding Dates Estimates **Actuals** Adjustments

Please select a provider from the drop down below

Location: [HOME](#) > [FUNDING](#) > ACTUALS

Manage Providers

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

► Show Stretched Offer Validation Calculation

Add Child Send Claim

		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Delete	Edit	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
Delete	Edit	Add Pending	Doo, Scooby	12-Nov-2010	225.00	0.00

Add Child Send Claim

The Local Authority will recommend a number of funded hours available each claim period. This will ensure there are sufficient funded hours accessible over a 12 month period. Parent/carers must claim their child's Early Education entitlement over three claim period; it is not possible to condense the maximum entitlement (570 hours) into less than 38 weeks.

If the hours significantly exceed the recommended available for the claim period, the Early Years Finance team will amend the claim as there will be insufficient hours available for future funding periods.

Where funding is not paid by the Local Authority it is acceptable for the provider to charge for these unfunded hours at the hourly rate for the session/hours attended.

Parent/Carers must be advised where the total funding claim may exceed the maximum available (570 hours).


The Local Authority will check the total number of funded hours claimed for every child and adjust any claim that exceeds 570 hours.

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### To amend the Funded Hours for Term

Click EDIT




		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Delete	Edit	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
Delete	Edit	Add Pending	Doo, Scooby	12-Nov-2010	225.00	0.00

Select Funding Details and calculate the Weeks Attended in Term

#### How to calculate Weeks Attended in Term –

Total Funded Hours to be Claimed  
(as stated on claim form)  
Divided by  
Funded Hours Per Week



Child Details

Funding Details

**Funding Details**

Present during Census ☐

Term Start Date\* 01-Apr-2014

Term End Date\* 31-Aug-2014

Attends Two Days or More ☒

Weeks Attended in Term\*

Funded Hours Per Week\*

Non-Funded Hours Per Week\* 4

**Stretched Attendance**

Stretched Offer ☒

Monday

Tuesday

Wednesday

Thursday

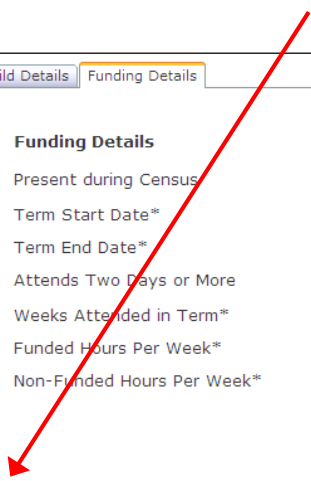
Friday

Saturday

Sunday

Untick Stretched Offer and Amend Weeks Attended in Term field with calculation

Once amended click SAVE



Child Details

Funding Details

**Funding Details**

Present during Census ☐

Term Start Date\* 01-Apr-2014

Term End Date\* 31-Aug-2014

Attends Two Days or More ☒

Weeks Attended in Term\* 12.6

Funded Hours Per Week\* 15.00

Non-Funded Hours Per Week\* 0.00

Save

Cancel

\*denotes mandatory fields

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

The total hours will be amended

Add Child		Send Claim				
		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Doo, Scooby	12-Nov-2010	189.00	0.00




Once all the children's hours have been checked to ensure that the hours match the parent/carer claim form, the claim is ready for submission

Click SEND CLAIM

Add Child		Send Claim				
		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2009	186.00	0.00
<a href="#">Delete</a>	<a href="#">Edit</a>	Add Pending	Doo, Scooby	12-Nov-2010	189.00	0.00

Once submitted, the following Submission Successful message will appear


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Location: [HOME](#) > [FUNDING](#) > [ACTUALS](#)


Please select a provider from the drop down below

Manage Providers

 **Submission Successful**



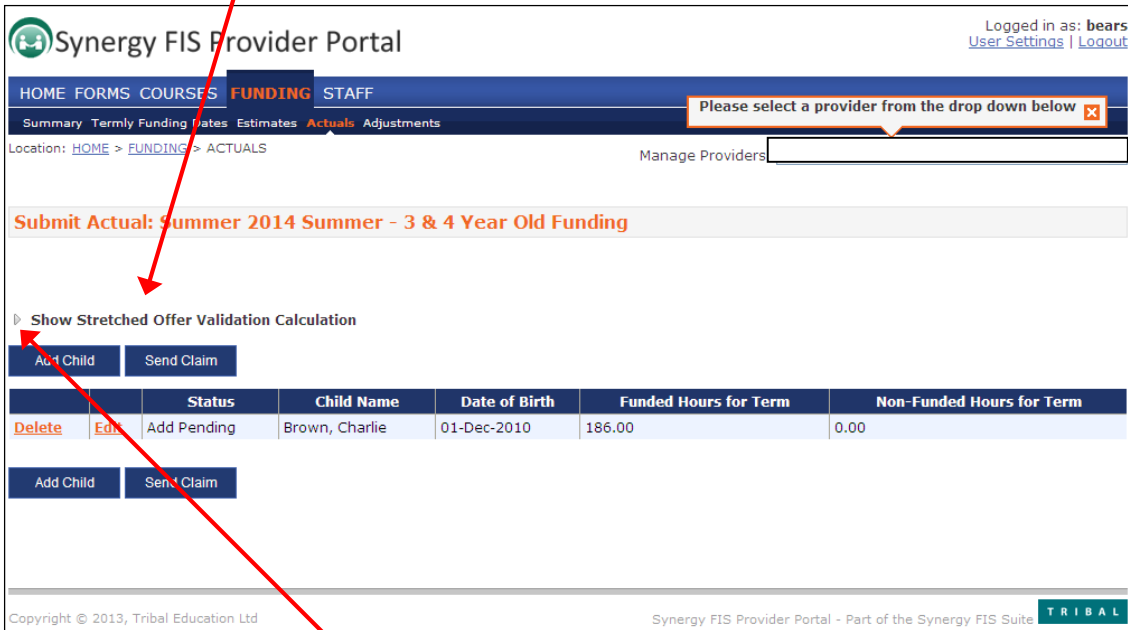
#### POINTS TO NOTE:

- It is possible to update or amend your claim until VIEW appears for the claim period
- Additional children can be added to your claim throughout the claim period
- Outstanding submissions will be highlighted by 
- Status Field –  
 EDIT: Record is available for update / check  
 EDIT PENDING: Details have been submitted but not yet approved  
 DELETE: Record can be deleted  
 REQUEST DELETE: Details have been submitted for deletion

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

What does this mean?



Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > ACTUALS

Manage Providers:

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

▶ Show Stretched Offer Validation Calculation

[Add Child](#) [Send Claim](#)

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
<a href="#">Delete</a> <a href="#">Edit</a>	Add Pending	Brown, Charlie	01-Dec-2010	186.00	0.00

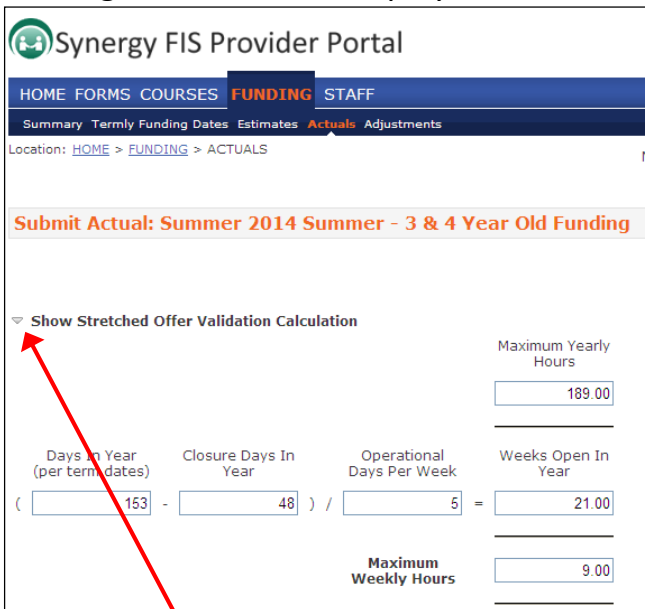
[Add Child](#) [Send Claim](#)

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Clicking the arrow will display –



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Summary Termly Funding Dates Estimates **Actuals** Adjustments

Location: [HOME](#) > [FUNDING](#) > ACTUALS

**Submit Actual: Summer 2014 Summer - 3 & 4 Year Old Funding**

▼ Show Stretched Offer Validation Calculation

Maximum Yearly Hours:

Days in Year (per term, dates): (  -  ) /  =

Maximum Weekly Hours:

This is a view only screen

It is the data which the stretched offer will be validated against, and is based on the calendar days entered.

“Stretched Offer” – the pattern of funded hours is fewer per week over more weeks of the claim period

In this example it means a parent/carer wishing to claim the entitlement over school holidays will not be able to claim more than 9 hours per week.

It also displays the maximum number of hours for the claim period.

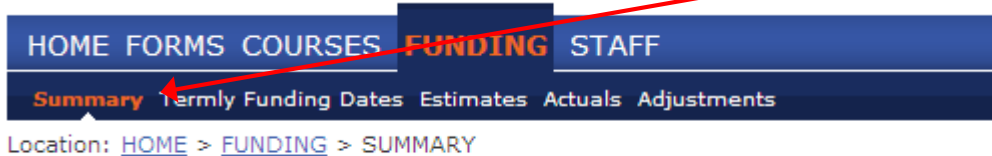
Click the arrow again to minimise the detail

## EARLY YEARS AND CHILDCARE


### Provider Portal – Funding Module

#### Payment Record

To view the payments relating the funding entitlement click SUMMARY



The following information will be displayed once the claim period to be viewed is selected


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[Summary](#) [Termly Funding Dates](#) [Estimates](#) [Actuals](#) [Adjustments](#)

Location: [HOME](#) > [FUNDING](#) > [SUMMARY](#)

Manage Providers

Please select a provider from the drop down below

**Summary: 2014 Spring - 3 & 4 Year Old Funding**


Estimates	
Term Length (Weeks)	2040.50
Hours Per Term	£3.510
▶ Total Rate Per Hour	£7162.16
Term Funding Amount	60.00%
Interim %	£4297.30
Interim Amount Due	£0.00
Adjustments Paid	
Interim Amount Paid (Inc. Adj)	£0.00
Paid	No
Paid Date	

Actuals	
Term Length (Weeks)	11.00
Funded Hrs (Term)	2073.50
▶ Total Rate Per Hour	£3.510
Sub Total (Hrs x Total Rate)	£7277.99
Term Funding Amount	£7277.99
Interim Amount Paid (before Adj)	£0.00
Term Funding Amount Balance	£7277.99
Adjustments Paid	£0.00
Actual Amount Paid (Inc. Adj)	£0.00
Total Weekly Non-Funded Hours	0.00
Paid	No
Paid Date	

[Return To Headcount Summary](#)

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#### POINTS TO NOTE:

- The payment record will NOT display actual data until the submitted funding claim has been verified by the Early Years Finance team
- The funding amounts should be considered as estimates until the Early Years Finance team has processed the payment for the claim period

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

Estimates	
Term Length (Weeks)	
Hours Per Term	2040.50
▶ Total Rate Per Hour	£3.510
Term Funding Amount	£7162.16
Interim %	60.00%
Interim Amount Due	£4297.30
Adjustments Paid	£0.00
<hr/>	
Interim Amount Paid (Inc. Adj)	£0.00
<hr/>	
Paid	No
Paid Date	

Final Estimate  
for Interim Hours

Hourly Rate

Payment  
processed by  
Local Authority

Payment Date

Actuals	
Term Length (Weeks)	11.00
Funded Hrs (Term)	2073.50
▶ Total Rate Per Hour	£3.510
<hr/>	
Sub Total (Hrs x Total Rate)	£7277.99
<hr/>	
Term Funding Amount	£7277.99
Interim Amount Paid (before Adj)	£0.00
<hr/>	
Term Funding Amount Balance	£7277.99
Adjustments Paid	£0.00
<hr/>	
Actual Amount Paid (Inc. Adj)	£0.00
Total Weekly Non-Funded Hours	0.00
Paid	No
Paid Date	

Final Hours to be  
Claimed

Total Due for  
claim period

Interim Payment

Balance Due

Payment Date

## EARLY YEARS AND CHILDCARE

### Provider Portal – Funding Module

#### Adjustments

To view the supplements paid for 3 and 4 year old funding, Click ADJUSTMENTS



Location: [HOME](#) > [FUNDING](#) > ADJUSTMENTS

At the END of each claim period, the information will be updated to confirm the supplements that have been paid for the period.

- Deprivation
- Flexibility
- Quality and Sustainability

View Adjustments: 2014/2015 Summer - 3 & 4 Year Old Funding								
Adjustments - Total: £450.00, Paid Date: 21-Aug-2015								
Type	Date Added	Child Name	Date of Birth	Number of Hours	Weightings per Hour	Rate per Hour	Amount	Reason
Provider	21-Aug-2015			0.00	£0.000	£0.000	£250.00	Flexibility supplement
Provider	18-Aug-2015			0.00	£0.000	£0.000	£200.00	Deprivation supplement 10% area
Not Paid - Total: £555.55								
Type	Date Added	Child Name	Date of Birth	Number of Hours	Weightings per Hour	Rate per Hour	Amount	Reason
Provider	18-Aug-2015			0.00	£0.000	£0.000	£555.55	Quality Supplement