



Synergy Guidance: Education Portal for Providers

Document Identity

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Initials	Version	Date	Comment
RU	1.0	26/01/2023	Initial guidance
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VS	3.0	16/06/2023	Revised guidance

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SUMMARY OF GUIDE

This guidance is to assist Early Years Providers, including childminders, with Early Years funding, including the following:

- Logging in to the portal
- Check a code for 30 hours funding
- Enter child/parent funding details & see details and summary of payment
- Adjust the funding details & see details of adjustment payment

There are separate guides for Sufficiency and Census input through the portal

PROCESS FOR PAYMENTS

The Synergy system will have 3 periods as detailed below:

- 1. Actual Period: where child level data is required, forecasting who will be accessing at your Early Years Setting next term and the number of hours that they are attending. This will open at the end of the previous term.
- 2. Adjustment Period 1: opens at the beginning of the new term so you can confirm the data submitted in the Actual period and advise the Early Years funding team if there are any changes to the expected attendance, this may include children starting or leaving the setting or an increase/decrease in funded hours.
- 3. Adjustment Period 2: opens at the end of the term so you can advise the Early Years funding team if there were any changes or amendments during the term.

	Spring Te	erm		Sum	nmer	Term		A	utum	ın Te	rm
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Spring 1st Adjustment Period		Spring 2nd Adjustment Period Summer Actual									
		Period	Summer 1st Adjustment Period			Summer 2nd Adjustment Period					
						Autumn Actual Period					
								Autumn 1st Adjustment Period			Autumn 2nd Adjustment Period
											Spring Actual Period

Below is a visual guide showing a typical year and how the periods of funding will fall:

LOGGING INTO THE EDUCATION PORTAL

The portal can be found here: <u>https://portsmouth.cloud.servelec-synergy.com/SynergyWeb</u>



Select the Early Years Provider Login section

You will be taken to the provider login screen. Enter your email address in here and click Next





*If you have forgotten your password, click the forgot password link to get a temporary link to change your password or get in touch with the Early Years team on 023 9284 1974 who will be able to assist you.

If your account is set up so you can enter funding for multiple early years providers, you will be able to select your provider from a drop-down list like this:

ier to proceed.
eed
L3
P/S Provider Portal - Part of the Synergy P/S Suite

*Please note if this is the case you will need to log out and log back in to select a different provider.

Once logged in if you have no actions pending your home screen will look like this:

Provider: Portsmouth Test (Childminder) ne Forms Funding Sufficiency Reports Welcome to FIS Provider Portal Please make a selection from the above menu to proceed		Organisation: Portsmouth Test
Me Forms Funding Sufficiency Reports Welcome to FIS Provider Portal Please make a selection from the above menu to proceed		Provider: Portsmouth Test (Childminder)
me Forms Funding Sufficiency Reports Welcome to FIS Provider Portal Please make a selection from the above menu to proceed		
Welcome to FIS Provider Portal Please make a selection from the above menu to proceed	ne Forms Funding Sufficiency Reports	
Welcome to FIS Provider Portal Please make a selection from the above menu to proceed		
Welcome to FIS Provider Portal Please make a selection from the above menu to proceed		
Please make a selection from the above menu to proceed		
	Welcome to FIS Provider Portal	
	Welcome to FIS Provider Portal Please make a selection from the above menu to proceed	
	Welcome to FIS Provider Portal Please make a selection from the above menu to proceed	
	Welcome to FIS Provider Portal Please make a selection from the above menu to proceed	

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FIS Provider Portal - Part of the Synergy FIS Suite

WARNINGS YOU MAY SEE ON THE EDUCATION PORTAL

Below are examples of messages you may see as you work on the Education Portal, others you may see as you read through the guide.

0	?	New, Unsubmitted Chil	d	You have entered the child's details but not yet sent your claim.
0	n	Unsubmitte	ed Claim	Not yet submitted to the LA
0	າ New, Aw	aiting LA Download		New adjustment, sent to the LA and waiting for them to process.
0	າ	Awaiting L	A Download	You have sent your claim to the LA and are waiting for them to process it.
0	2	Claim Rejected		Claim was rejected by the LA



ENTERING FUN	DING DETAILS		
Once logged into	the portal click on the funding tab	✓ - ♂ ×	
Click on Actuals	Organisation: Provider 7 Provider 7 (Okładenister) Home: Founding: Sufficiency Reports Summery: Stranke Access: Agustments: Bigblity Okcier: Registered Interest: Salect Vear and Term Stranke Access: Agustments: Signity Charles: Stranke (Sep: Charl) Agustments: Signity Charles:		
	Anderweiter Potes Funding x +		

Select the year and term that you want to enter data in for (for the purpose of this guide it will be Summer 2023/24)

2 Year Old and 3 & 4 Year Old funding types are split.

Select the funding type you wish to review (for the purpose of this guide it will be 3 & 4 Year Old)

• FIS Provider Portal: Funding × + ← → C e portsmouth-test.cloud.servelec-synergy.com//Mig/SynergyWeb/Providers/NEFHeadcount. Modules w	spx?Tab=Sum&yt=NfDsHa8Suc8%3D	Ê \$	~ ★ ≕	-	Updat	× *
	Organisation: Provider 7 Provider: Provider 7 (Childminder)					-
Summary Estimates Actuals Adjustments Eligibility Checker Registered Summary Head Count Records for 2023/24 - Summe 2023/24 Summer (Apr-Aug) Funding Type	er (Apr-Aug)					
Spring (Jan-Mar) 2 Year Old Autumn (Sept-Dec) 3 & 4 Year Old						
© 2023 Servelec Synergy Ltd	FIS Provider Portal - Part of the Symergy FIS Suite					
Migration ©	Synergy" 2 2022 Servelec Education Ltd 22.30.4679.16875					-

You can change funding types at any point by clicking on change at the top of the main section

Modules -		
	Organisation: Provider 7 Provider - Provider 1	
	Home Forms Funding Sufficience Panaste	
	Summary Children Southand Adjustments Eligibility Checker Registered Interests	
	Submit Actual: 2023/24 Summer (Apr-Aug) - 2 Year Old CHANGE	
	Add Child Enter EV Voucher Send Claim	
	Add Child Enter EY Voucher Send Claim	

Once you have selected on your funding type you can click on the summary tab which will display the funds sent to you, broken down into Universal funding, extended funding, the amount paid to date and so on.

Summary: 2023/24 Summer (Apr-A	ug) - 3 & 4 Year Old CHANG	GE	
		Rate x Hours may not equal Totals as rounding is applied p The totals shown are the sum of the funding amounts per	er child.
Estimates		Actuals	erind.
erm Length (Weeks)	13.00	Term Length (Weeks) Term Time	13.00
Provider Rate applied	£4.45	 Provider Rate applied to child funding 	£4.45
stimate Funding		Universal Funding	
ours Per Term	0.00	Funded Hours for Term	231.00
erm Funding Aniount	£0.00	Funding Amount @ Provider Rate	£1027.95
iterim %	100.00%		
nterim Amount Payable	£0.00	Universal Funding Amount	£1027.95
		Extended Funding	
otal Interim Amount Paid to Date	±0.00	Funded Hours for Term	0.00
etore Adj)		Funding Amount @ Provider Rate	£0.00
nterim Amount Payable Balance	£0.00	Extended Funding Amount	£0.00
		Totals	
		Funded Hours for Term	231.00
		Funding Amount @ Provider Rate	£1027.95
		Child Weightings	£0.00
rocessed	Yes	Term Funding Amount	£1027.95
rocessed Date	21-Feb-2023	Interim Amount Paid (before Adj)	£0.00
		Term Funding Amount Balance	£1027.95
		Adjustments Paid with Final Payment	£0.00
/			
		Actual Amount Paid (Inc. Adj)	£1027.95
		Processed	Var

Click on the Actuals tab. This is the section you will use to forecast children/hours. You can add new children who have joined your setting, update details of children who are continuing or update the details of children no longer at your setting.



me Forms Funding Suffi	ciency Reports	istered interests				
mit Actual: 2023/24 Sumn	ner (Apr-Aug) - 3	& 4 Year Old CHAN	NGE			
d Child Send Claim						
Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Unsubmitted Child	Jones, Hannah (04-Oct-2019)	121.00	0.00	£538.45		
New, Unsubmitted Child	Smith, David (12-May-2020)	110.00	0.00	£489.50		
d Child Send Claim						



UPDATING A CHILD'S DETAILS

Click on the child's name.

$\langle \rangle$			Organisatio Provider: Pro	on: Provider 7			
			Provider. Pro	vider / (childhinder)			
Home Forms Fundi	ng Sufficie	ency Reports					
Summary Estimates Actuals	Adjustments E	ligibility Checker Regi	stered Interests				
Submit Actual: 2023/	24 Summe	r (Apr-Aug) - 3	& 4 Year Old CHA	NGE			
Add Child Send C	laint						
Status		Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
O New, Unsubmitted	Child	Jones, Hannah (04-Oct-2019)	121.00	0.00	£538.45		
New, Unsubmitted	Child	Smith, David (12-May-2020)	110.00	0.00	£489.50		
Add Child Send C	laim						
© 2023 Servelec Synergy Ltd						FIS Provider Portal	- Part of the Synergy F

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You will be presented with a summary of that child with tabs you can click on to update Child Details, Parent / Carer Details, Funding Details and Documents.

Modules -							
		/				 	
			Organisation: Provider 7				
			wae. Provider / (childhinder)				
	Home Forms Funding Su	fficiency Reports					
	Summary Estimates Actuals Adjustme	ents El ability Checker Registered Inter	ests				
	Name: David Smith DOB: 12	Alay-2020					
		ay-Loco					
	Summary Child Details Parent / Care	er Details Funding Details Documen	6				
	Term Start Date	01-Apr-2024	Universal Funding				
	Term End Date No of weeks attended	31-Aug-2024 11.00	Funded Hours Per Week	10.00			
	Nominated for DAF	No	Funded Hours for Term	110.00			
	Provider Total Rate	£4.45		C100 50			
			Child Weightings	£489.50 £0.00			
			Universal Funding Amount	£489.50			
			Totals				
			Funded Hours for Term	10.00			
			Total Funding (excl. Adj)	£489.50			
			Total amount from Adjustments	£0.00			
			Total amount from Pending Adjustments	£0.00			
			Total Funding For Term (inc Adj)	£489.50			

Press Save to update the values entered.

To add a child, click the Add Child button.

1

Home	Forms Funding Suffic	tiency Reports		contract - (annummeter)			
Summar	ry estimates Actuals Adjustments	Eligibility Checker Regi	istered Interests				
Submi	t Actual: 2023/24 Summ	ier (Apr-Aug) - 3	& 4 Year Old CHAI	NGE			
Add C	Child Send Claim						
	Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
0 D	New, Unsubmitted Child	Jones, Hannah (04-Oct-2019)	121.00	0.00	£538.45		
C DbA	New, Unsubmitted Child	Smith, David (12-May-2020)	110.00	0.00	£489.50		
	velec Synergy Ltd					FIS Provider Portal -	Part of the Synergy FIS Sui

Synergy

If you are claiming 30hrs on the headcount use the eligibility checker **BEFORE** adding the child.

Click on the funding tab.

6 FIS Provider Portal: Funding × +		✓ – ₫ ×
\leftarrow \rightarrow C $($ portsmouth-test.cloud.servelec-synergy.com/Mig/SynergyWeb/	Providers/NEFHeadcount.aspx?Tab=Sum	🖄 🎓 📑 🔲 🏝 Update 🚦
Modules -		PV
	Organisation: Provider 7 Providen Provider 7 (Childminder)	
Home Forms Funding Suffici Summary Estimate Actual Adjustments	ency Reports Eligibility Checker Registered Interests	
Select Year and Term	1	
2023/24 Summer (Apr-Aug) Spring (Jan-Mar) Autumn (Sept-Dec)		
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	Migration © 2022 Servelec Education Ltd 22.30.4679.16875	

Click on 'Eligibility Checker'

Click on the 30 hours free childcare

• FIS Provider Portal: Funding ×	+				v	- 0	×
← → C 🔒 portsmouth-test.cld	ud.servelec-synergy.com/Mig/SynergyWeb/Providers/NEFHeadcount.aspx?Tab=Elig		€ ☆	* =	V 🗆	Lupda	te :)
Modules 👻						P	2
	Organisation: Provider 7 Provider: Provider 7 (Childminder)						
	Home Forms Funding Sufficiency Reports Summary Estimates Aduate Adjustments Eliability Checker Reportered Interests						
	Eligibility Checker						
	Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.						
	Outs Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system. 30 Hours Free Childcare						
	© 2023 Servelec Synergy Ltd PIS Provider Portal	- Part of the Synergy FIS Suite					
	Migration © 2022 Servelec Education Ltd 22.30.4679.16875						·



Enter the details provided by the parents into the pop-up box and click submit to confirm the code is correct.

	30 Hours Free Childcare
Please enter a valid Eligibility Code and Chi Partner Details are optional but if entered t	ld Date of Birth, together with Parent/Carer Details. hen all fields, except Forename, must be filled in.
Eligibility Code*	
Child Date of Birth*	
Parent/Carer Forename	
Parent/Carer Sumame	
Parent/Carer NI Number*	
Consent must be given for this	Eligibility Check
Partner Forename	
Partner Surname	
Partner NI Number	
*denotes mandatory fields	
Submit Cancel	

Enter data into the Child Details. The Fields with an asterisk are mandatory and the system will provide a list of missing fields if you try and save before they are completed. When entering data into the child details tab, there is an address search function. Enter a postcode and click search.

	Or Provide	ganisation: Provider 7 r: Provider 7 (Childminder)	
ne Forms Funding S	ufficiency Reports ments Eligibility Checker Registered Interests		
Details Parent / Carer Details	Funding Details Documents		
Child Details		Search for an Address	
Forename*		Primary	
Middle Name Surname* DOB*		Postcode*	Search
Proof of DOB		Address	
Gender*	Male Female	Address Line 1*	
Preferred Surname		Address Line 2	
Ethnicity*	<up>known></up>	 Address Line 3 	
SEN COP Stage*	No Special Educational Need	✓ Locality	
-		Town	
		County	
		Postcode*	

If the software returns a valid address, click on Confirm

_

	Provider:	Provider 7 (Childminder)	
ne Forms Funding S	ufficiency Reports		
mary Estimates Actuals Adjustr	ments Eligibility Checker Registered Interests		
Details Parent / Carer Details	Funding Details Documents	\backslash	
Child Details		Search for an Address	
Forename*	lane	Primary	
Middle Name	suite	Postcode*	PO1 18G
Surname*	Smythe		Count
DOB*	01-Jan-2020		Search
Proof of DOB		Address	
Gender*	🗆 Male 🗹 Female	Address Line 1*	103 Commercial Road
Preferred Surname		Address Line 2	
Ethnicity*	Any Other Mixed Background 🗸	Address Line 3	
SEN COP Stage*	No Special Educational Need 💙	Locality	
		Town	Portsmouth
		County	
		Postcode*	PO1 1BG
		Cancel	Enter Manually Confirm

If the software cannot find an address, you can click to Enter Manually



Enter parent/carer details and tick the 30 hours box (do not click 'save')

Entering Parent, Carer details enable extended hours.	is us to check whether the child is a	rigible for Early Years Pupil Premium (EVPP) f	unding, and wheth	er the child is eligible f
Nease ensure you input details for a that the correct consent boxes are s	all records that have given their per elected as per the usage of the det	mission to do so, as this ensures you receive alls.	the additional fund	ling. Please also ensure
Details are optional but if entered to	ten at least Forename, Sumame an	d Ni or NASS Number must be filled in.		
Parent / Carer Details		Partner Details		
Forename) Forename	0	
Surname		Sumame	£	
DOB	18	DOB	0	
NI or NASS Number		Ni or NASS Number		1
lick to give consent to Digibility	C 8179 C 20H	Tick to give consent to Eligibility	C EVPP	D 30H

Parent/carer details **must** be added and boxes ticked for all children nominated for EYPP for consent to carry out checks. You can view the children that have already been awarded EYPP on your summary/actual pages.

In the funding details tab enter code in 'Funding Details' tab and click on '30 Hours Free Childcare' blue button to run a second check **before** adding the hours.

\mathbf{A}	Funding Details Documents		
Funding Netails		Attendance Days	
Start Date*		Attends Monday	O Ver O No
End Date*		Attends Tuesday	
$\langle \rangle$	Default Terrs Detail	Attends Wednesday	
	Default ferm Dates	Attends Thursday	O Yes O No
Weeks Attended in Ierm*		Attends Friday	O Yes O No
Present during Census		Attends Saturday	O Yes O No
Attends Two Days or More		Attends Sunday	O Yes O No
Nominated for DAF*	○ Yes ○ No		
Universal Funded Hours per	Week	Non-Funded Hours per Wee	:k
Universal Hours*		Non-Funded Hours*	
Extended Funded Hours ner	r Werk	if this child attends anothe	r setting as well as yours, be sure to enter the
Extended Hours*		hours as per what has been ag	greed with the child's parent/carer
30H Eligibility Code	•		
	30 Hours Free Childca	Maximum Values Allowed:	
511 JUL 6 2011		Number of Weeks: 13.00	
Eligible for SUH		Universal Weekly Hours: 10.00	p
Total Funded Hours per We	ek	Universal Yearly Hours: 380.00	D
Total Funded:		Extended Weekly Hours: 20.0 Extended Yearly Hours: 380.0	0

If you click on the default term dates button it will automatically complete the start date and end date of the child's attendance for the entire term.



To upload evidence for DAF you must click on the Documents tab and upload the file required.

When saving it will tell you if you have missed any mandatory fields and where to find them

Save Record Falled Due to The	Errors Listed Below			
Details Parent / Carer Details Fu	inding Details Documents	/		
Funding Details		Attendance Days		
Start Date*	*	Attends Monday	○ Yes ○ No	
End Date*	*	Attends Tuesday	○ Yes ○ No	
	Default Term Dates	Attends Wednesday	O Yes O No	
	Delault lefin Dates	Attends hursday	O Yes O No	
Weeks Attended in Term*	*	Attends Friday		
Present during Census		Attends Saturday		
Attends Two Days or More		Attends Sunday		
Nominated for DAF*	○ Yes ○ No *		0 10 0 10	
Universal Funded Hours per V	Veek	Non-Funded Hours per Wee	ek	
Universal Hours*	*	Non-Funded Hours*		*
		C if this shill strends such to		
Extended Funded Hours per V	Veek	hours as per what has been ad	greed with the child's parent/carer	nterthe
30H Eligibility Code				
Soft Englosity Code		Maximum Values Allowed:		
	30 Hours Free Childoare	Number of Weeks: 13.00		
Eligible for 30H				
		Universal Veekly Hours: 10.0 Universal Yearly Hours: 380.0	0	
Total Funded Hours per Week		Extended Machine Herman 20.0	0	
Total Funded:	0.00	Extended Veekly Hours: 20.0 Extended Yearly Hours: 380.0	0	
	/			
lowing errors need to be fixed before	the record can be saved. etails Tab)			
tart Date must be entered (Funding D	· · · · · · · · · · · · · · · · · · ·			

If you are stretching entitlement please tick here - if you cannot do this and think you should be able to please contact <u>EYFunding@portsmouthcc.gov.uk</u> or telephone on 023 9284 1974.

Summary Estimates Actuals Adjustm	ents Eligibility Checker Registered Interests		
Name: Leonardo Dicaprio D)OB: 01-Mar-2021		
Summan Child Datails Darant / Car	rar Dataile - Funding Dataile - Documente		
Jummary Child Details Parent / Cal	er betails Funding betails botuments		
Funding Details		Attendance Days	
Start Date*	01-Jan-2031	Attends Monday	Yes O No
End Date*	31-Mar-2031	Attends Tuesday	● Yes ○ No
\mathbf{X}	Default Term Dates	Attends Wednesday	Yes O No
Weeks Attended in Term	11.00	Attends Thursday	Yes O No
	1100	Attends Friday	Yes O No
Present during Census		Attends Saturday	🔾 Yes 💿 No
Attends Two Days or More	🖌 🔽	Attends Sunday	🔾 Yes 💿 No
Stretching Entitlement			
Universal Funded Hours per	Week	Non-Funded Hours per Wee	k
Universal Hours*	15.00	Non-Funded Hours*	10.00
		if this child attends anothe	r setting as well as yours, be sure to en
		hours as per what has been ag	reed with the child's parent/carer
		Maximum Values Allowed:	
		Number of Weeks: 13.00	
		Lipiversal Weekly Hours: 15.0	n
		Universal Termly Hours: 195.0	0
		Universal Yearly Hours: 780.0	D

Once you have entered the child's data, you can send the claim in to the LA to check and process.

Home Forms Funding Suffici	iency Reports					
Summary Estimates Actuals Adjustments	Eligibility Checker Regis	tered interests				
where it A struct 2022 /24 Commu						
upmit Actual: 2025/24 Summe	er (Apr-Aug) - 5 c	X 4 YEAR OID CHANG	it.			
Add Child Send Claim						
Status	Child	Universal Hours E (inc Adj) (i	xtended Hours inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Unsubmitted Child	Jones, Hannah (04-Oct-2019)	121.00	0.00	£538.45		
New, Unsubmitted Child	Smith, David (12-May-2020)	110.00	0.00	£489.50		
Add Child Send Claim						
023 Servelec Synergy Ltd					FIS Provider Portal -	Part of the Synergy FIS
		Syne	rav			
	Migratio	on © 2022 Servelec Edu	ucation Ltd 22.30.4	679.16875		

	ann pr					
+				/		
			Organisation: Provider: Ports	Portsmouth Test mouth Test (Childminder)		
om	ie Form	s Funding Sufficiency	Reports			
mm	nary Estim	ates Actuals Adjustments Eligibili	ty Checker Registered interests			
0						
/	Submis	sion Successful				
hn	nit Actu	al: 2030/31 Spring (Jan-	Mar) - 2 Year Old CHANGE			
M III		an 2000/01 opining (san				
dd	l Child	Enter EY Voucher Se	nd Claim			
		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
	r)	New, Awaiting LA Download	Berry, Mary (05-Feb-2020)	195.00	£975.00	
	っ	New, Awaiting LA Download	Dicaprio, Leonardo (01-Mar-2021)	165.00	£825.00	
	3	Awaiting LA Download	Nicholas, Jack (05-Jun-2020)	55.00	£275.00	

On your home page, when you log in it will tell you if you have an unsubmitted claim.

	Organisation: Portsmouth Test Provider: Portsmouth Test (Childminder)
ome Forms Funding Sufficiency Reports	
Welcome to FIS Provider Portal	
Please make a selection from the above menu to proceed	
Notifications	
These records have been edited but not yet claimed.	
There are unsubmitted child funding records for Pr	ovider: Portsmouth Test - Childminder
2030/31 Spring (Jan-Mar) - 2 Year Old (2 unsubm)	nitted, 0 rejected)

Until the claim has been processed by the LA you will be unable to make adjustments and will see this message:



Please email the Authority to request changes to the adjustments.

IF YOUR CLAIM IS REJECTED

A notification of any rejected claims will display on the home page when you log in. Click on the link

	Organisation: Testproviderspr3005 Provider: Testproviderspr3005 (Childminder)
e Forms Funding Sufficiency Repor	ts
Welcome to FIS Provider Portal lease make a selection from the above menu to proc	eed
lotifications	
hese records have been edited but not yet o	laimed.
There are rejected child funding records for	Provider: Testproviderspr3705 - Childminder
🔶 2030/31 Summer (Apr-Aug) - 2 Year O	ld (0 unsubmitted, 1 rejected)

To see why the claim has been rejected click on the child to open the record then click on the Summary tab.

			Organisatio Provider: Test	n: Testproviderspr3005 providerspr3005 (Childminder)			
lorr	ne Form	ns Funding Sufficience	cy Reports				
umn	nary Estim	ates Actuals Adjustments Eligi	ibility Checker Registered Interests Apr-Aug) - 2 Year Old CHAN	GE			
Add	l Child	Enter EY Voucher	Send Claim				
		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	
	2	Claim Rejected	Underwood, Kelly (05-May-2020)	156.00	£780.00		
Add	l Child	Enter EY Voucher	Send Claim				

Notes from the LA will show here

	Organisati Provider: Te	on: Testproviderspr3005 stproviderspr3005 (Childminder)	
e Forms Funding Suf	ficiency Reports		
nary Estimates Actuals Adjustme	nts Eligibility Checker Registered Interests		
e: Kelly Underwood DO	B: 05-May-2020		
ary Child Details Parent / Care	Details Funding Details Documents		
ferm Start Date	01-Apr-2031	Indexed Free New York	
ferm End Date	31-Aug-2031	Universal Funding	12.00
No of weeks attended	13.00	Funded Hours for Torm	12.00
Provider Total Rate	£5.00	Funded Hours for ferm	130.00
, Howaer Iournate	2500		
Claim Rejected		Funding Amount @ Provider Rate	£780.00
Universal hours exceeded - ple	ase revise	Child Weightings	£0.00
		Universal Funding Amount	£780.00
		Totals	
		Funded Hours Per Week	12.00
		Funded Hours for Term	156.00
		Total Funding (excl. Adj)	£780.00
		Total amount from Adjustments	£0.00
		Total amount from Pending Adjustments	£0.00
		Total Funding For Term (inc Adj)	£780.00
		1999 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 199	

Once you have received payment the status will disappear and the child information on the payment will be displayed, breaking it down into Universal hours, Extended Hours and Total Funding

		O: Provide	rganisation: Provider 7 r: Provider 7 (Child	minder)		
Home Forms Funding	ng Sufficiency Report	ts				
Summary Estimates Actuals	Adjustments Eligibility Checke	er Registered Interests	Louver			
View Actuals: 2023/2	4 Summer (Apr-Aug)	- 3 & 4 Year Old	CHANGE			
Child	Universal Hours (nc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status	
Jones, Hannah (04-Oct-2019)	121.00	0.00	£538.45			
Smith, David (12-May-2020)	110.00	0.00	£489.50)		



Click on Actuals on the summary tab to view what you've actually been paid:

Summary: 2023/24 Summer (Apr-Aug)	- 3 & 4 Year Old CHANG	E	
		Rate x Hours may not equal Totals as rounding is applied p	er child.
		The totals shown are the sum of the funding amounts per o	thild.
Estimates		Actuals	
erm Length (Weeks)	13.00	Term Length (Weeks) Term Time	13.00
Provider Rate applied	£4.45	Provider Rate applied to child funding	£4.45
stimate Funding		Universal Funding	
lours Per Term	0.00	Funded Hours for Term	231.00
erm Funding Amount	£0.00	Funding Amount @ Provider Rate	£1027.95
nterim 96	100.00%		
iterim Amount Payable	£0.00	Universal Funding Amount	£1027.95
		Extended Funding	
otal Interim Amount Paid to Date	£0.00	Funded Hours for Term	0.00
before Adjj		Funding Amount @ Provider Rate	£0.00
nterim Amount Pavable Balance	£0.00		
		Extended Funding Amount	£0.00
		Totals	
		Funded Hours for Term	231.00
		Funding Amount @ Provider Rate	£1027.95
		Child Weightings	£0.00
rocessed	Yes		
rocessed Date	21-Feb-2023	rerm runding Amount	±1027.95
		interim Amount Paid (before Adj)	£0.00
		Term Funding Amount Balance	£1027.95
		A diverse and Reid with Fired Revenues	2.327.33

Click here to change from 3 and 4 year old funding to 2 year old funding

н	Home Forms Funding Sufficiency Reports								
S	ummary Estimates Actuals Adjus	stments Eligibility Chec	ker Registered Interest	s					
Vi	ew Actuals: 2030/31 Sp	ring (Jan-Mar)	3 & 4 Year Old	CHANGE					
	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status			
	Smith, Jessica (07-Jul-2019)	165.00	0.00	£1653.00					

£1378.00

£250.00

0.00

0.00

Disability Access Funding will appear here, on the adjustments screen

110.00

50.00

Home	Forms Fu	nding Sufficiency F	eports						
Summary	/ Estimates Act	tuals Adjustments Eligibility	Checker Register	red Interest	15				
View Adjustments: 2030/31 Spring (Jan-Mar) - 3 & 4 Year Old CHANGE									
▼ Not P	aid - Total: £16	56.00							
Туре	Date Added	Child Name	Date of Birth	No. of Hours	Override Rate per Hour	Total Child Weighting Amount	Total Amount @ Provider Rate	Amount	Reason
Child	25-Mar-2023	Test Letitia	06-Oct-2019					£828.00	System generated adjustment for [DAF].
Child	13-Mar-2023	Smith Jessica	07-Jul-2019					£828.00	System generated adjustment for [DAF].

Test, Letitia (06-Oct-2019)

Test, Marcus (01-Apr-2020)

ADJUSTING FUNDING

Once the new term has started and the adjustment period is open the adjustment tab in the funding section will activate allowing you to make the adjustments required.

				Organisatio	n: Provider 7			
				Provider: Pro	vider 7 (Childminder)			
	Home Forms Funding	g Sufficiency Rep	oorts					
	Summary Estimates Actuals	djustments Eligibility Ch	necker Registered In	nterests				
	Submit Adjustments: 2	023/24 Summer	(Apr-Aug) - 3	& 4 Year O	d CHANGE			
	Add Child Send Clai	im						
	Status	Child	Pending Universal	Pending Extended	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term	Eligibility Status
		Jones, Hanna	h 0.0	Adj Hours	121.00	0.00	(Inc Adj) £538.45	5
		(04-Oct-2019) Smith, David		0.00	110.00	0.00	£ 490 E	-
		(12-May-2020)) 0.0		5 110.00	0.00	1409.50	,
	Add Child Send Clai	im						
	© 2023 Servelec Synergy Ltd						FIS Provider Portal	- Part of the Synergy FIS Su
				200	er av			
			Migration I ©			670 16875		
			Migration © .	Syne 2022 Servelec E	ergy [®] ducation Ltd 22.30.4	679.16875		
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date a child at	your setting click o	on their na	Migration © : me	Syne 2022 Servelec E	ducation Ltd 22.30.4	679.16875		
date a child at	your setting click o	on their na	Migration © . me	Syne 2022 Servelec E	ducation Ltd 22.30.4	679.16875		
date a child at	your setting click o	on their na	Migration © . me	Syne 2022 Servelec E	ducation Ltd 22.30.4	679.16875		
date a child at	your setting click o	on their na	Migration © . me	Syne 2022 Servelec E Organisatio	n: Provider 7	679.16875		
date a child at	your setting click o	on their na	Migration © . me	Organisatio Provider: Prov	n: Provider 7 vivider 7 (Childminder)	679.16875		
idate a child at	your setting click o	on their na	Migration © . me	Syne 2022 Servelec E Organisatio Provider: Prov	n: Provider 7 vivider 7 (Childminder)	679.16875		
date a child at	: your setting click of Home Forms Funding Summary Estimates Actuals A	on their na g Sufficiency Reg Adjustments Eligibility Ci	Migration © / me ports	Syne 2022 Servelec E Organisatio Provider Prov terests	ergy ducation Ltd 22.30.4 n: Provider 7 vider 7 (Childminder)	679.16875		
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date a child at	C your setting click of Home Forms Fundin Summary Estimates Actuals A Submit Adjustments: 2 Add Child Send Cla Status Add Child Send Cla	on their na g Sufficiency Reg Adjustments Eligibility Cl 2023/24 Summer inter-state inter-state similar Smith, David (12-May-2020	Migration (©) me boots heckr Registered In (Apr-Aug) - 3 Pending Universal Adj Hours b 0.0	Organisatio Provider: Prov terretts & 4 Year Ol Pending Extended No 0.00	r: Provider 7 vider 7 (Childminder) Id CHANGE	679.16875 Extended Hours (inc Adg) 0.00	Total Funding Amount for Term (mc Adi) £58.45 £489.50	Eligibility Status
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date a child at	C your setting click of Home Forms Fundin Summay Estimates Actuals A Submit Adjustments: 2 Add Child Send Cla Status Add Child Send Cla	on their na g Sufficiency Reg Adjustments Eligibility C 2023/24 Summer aim Child Child (12-May-2020 aim	Migration (me boots heck Registered In (Apr-Aug) - 3 Pending Adj hours h 0.0	Organisatio Organisatio Provider: Pro- terrests & 4 Year OI & 0 0.00 0 0.000	r: Provider 7 vider 7 (Childminder) Id CHANGE	679.16875 Ettended Hours (inc Adj) 0.00 0.00	Total Funding Amount for Term (inc Ad9 50 £489 50	Eligibility Status
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A pending adjustment tab will open.

Select from the drop down to add More Hours or Less Hours.

Enter in here the **TOTAL** hours adjusted during the **TERM** ie. 195 hrs, not 15hrs.

Include a detailed explanation of the change for the Early Years funding team. Ensure if it will mean a total of less than 30 universally funded hours, that the reduction is made to the extended hours too where applicable.

Organisation: Provider 7 Provider: Provider 7 (Childminder)	Example: it's a 10 week term and the child is
Home Forms Funding Sufficiency Reports Summary Estimates Adjustments Eligibility Checker Registered Interests Name: Hannah Jones DOB: 04-Oct-2019 Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Universal Pending Adjustment Extended Pending Adjustment Number of Hours Image: Comparison of	attending 15 hours a week. You previously claimed for 150 hours in week 3 the parents decide to reduce that to 10 hours a week. There will be a difference of 5 hours for 8 weeks, including week 3, giving a total of 40 hours to adjust.
Maximum Values Allowed: Universal Yearly Hours: 570.00 Save Cancel *denotes mandatory fields	Press Save once completed.
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Examples may be:

- New starter to claim 13 weeks x 15hrs from 17/04/2023
- Started on 08/05/2023 to claim 10 weeks x 15hrs
- Started 15/05/2023 to claim 7.5hrs x 9 wks. Shared funding
- Increasing hours from 10 to 15hrs per week from 17/05/2023
- Now eligible for 30hrs from 01/04/2023
- Did not start this term
- Left setting at the end of last term
- Child leaving 12/05/2023 to claim 4 week's notice



If the child is leaving the early years setting, go to the funding details tab

	tame. Haman Jones Dob. 04-	000-2019		
	Summary Child Details Parent / Carer Det	tails Funding Details Documents	Pending Adjustment	
	Funding Details		Attendance Days	
	Start Date*	01-Apr-2024	Attends Monday	○ Yes ○ No
	End Date*	30-Apr-2024	Attends Tuesday	○ Yes ○ No
		Default Term Dates	Attends Wednesday	○ Yes ○ No
	Weeks Attended in Termt		Attends Thursday	○ Yes ○ No
	weeks Attended in Term	11.00	Attends Friday	○ Yes ○ No
	Present during Census		Attends Saturday	○ Yes ○ No
	Attends Two Days or More		Attends Sunday	○ Yes ○ No
	Nominated for DAF	🔾 Yes 🖲 No		
	Universal Funded Hours per Wee	ek	Non-Funded Hours per Week	
	Universal Høurs*	11.00	Non-Funded Hours*	0.00
	Extended Funded Hours per Wee	ek	if this child attends another	setting as well as yours, be sure to enter
	Extended Hours*	0.00	hours as per what has been agr	eed with the child's parent/carer
	304 Eligibility Code			
		30 Hours Free Childcar	Maximum Values Allowed:	
	Filelikia fee 2011	So Hours Free childean	Number of Weeks: 13.00	
	Eligible for SOH		Universal Weekly Hours: 15.00	
	Total Funded Hours per Week		Universal Yearly Hours: 570.00	
	Total Funded:	11.00	Extended Weekly Hours: 30.00	
		<u>.</u>	Extended reany Hours: 1140.0	v
L				
	Save Cancel *denote	es mandatory fields		
	X			

Last updated: Jun 2023

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It will become an unsubmitted claim

		Provid	Organisation: I Ier: Provide	Provider 7 r 7 (Childminder)			
Home Forms Funding Sut	fficiency Reports						
Submit Adjustments: 2023/2	ents Eligibility Checker R	egistered Interes	• Year Old (HANGE			
Add Child Send Claim							
Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
Unsubmitted Claim	Jones, Hannah (04-Oct-2019)	-40.00	0.00	81.00	0.00	£360.45	
	Smith, David (12-May-2020)	0.00	0.00	110.00	0.00	£489.50	
Add Child Send Claim							
© 2023 dervelec Synergy Ltd						FIS Provider Portal - Pa	rt of the Synergy FIS Suit
	Migr	ation © 2022	Syner(Servelec Educa	ation Ltd 22.30.4679	.16875		

Press Send Claim to submit to the LA.

ADDING A CHILD

To add a new child to your setting, click on Add Child

Home	Forms Funding Su	ufficiency Reports						
Summa Subm	it Adjustments: 2023/	24 Summer (Apr-	egistered Interes	ts 4 Year Old	CHANGE			
Add	Child Send Claim							
	Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
0	Unsubmitted Claim	Jones, Hannah (04-Oct-2019)	-40.00	0.00	81.00	0.00	£360.45	
		Smith, David (12-May-2020)	0.00	0.00	110.00	0.00	£489.50	
Add	Child Sond Claim							
Add								
D 2023 Se	ervelec Synergy Ltd						FIS Provider Portal - Pa	rt of the Synergy FIS Suit

Complete the Child details, Parent / Carer Details screen as normal. The funding details will only allow you to enter:

- the start and end date of the funding (the default term dates will populate the dates for you, either to accept or edit)
- whether the child was present during census
- whether the child attends more than one day and their days of attendance
- whether the child is nominated for Disability Access Funding. Please note you will need to upload evidence of Disability Living Allowance to allow EY team to verify eligibility for DAF.

Funding Details		Attendance Days	
Start Date*		Attends Monday	○ Yes ○ No
End Date*		Attends Tuesday	○ Yes ○ No
	Default Term Date	Attends Wednesday	○ Yes ○ No
		Attends Thursday	O Ves O No
Weeks Attended in Term*	0.00	Attends Friday	O Yes O No
Present during Census		Attends Saturday	O Ver O No
Attends Two Days or More		Attends Sunday	
Nominated for DAF*	○ Yes ○ No	,	
Universal Funded Hours pe	er Week	Non-Funded Hours per We	ek
Universal Hours*	0.00	Non-Funded Hours*	0.00
Extended Funded Hours p	er Week	if this child attends anoth	er setting as well as yours, be sure to enter the
Extended Hours*	0.00	hours as per what has been a	greed with the child's parent/carer
3011 Eligibility Code			
	30 Hours Free Childo	Maximum Values Allowed:	
50 N. A. 2001	So Hours Free chinae	Number of Weeks: 13.00	
Eligible for 30H		Universal Weekly Hours: 10.0	00
Total Fundad Hours nor W	aak	Universal Yearly Hours: 380.0	00
Total Funded:	CCK	Extended Weekly Hours: 20.0	DO
		Extended Yearly Hours: 380.0	00

The TOTAL number of hours that the child is attending during the term with you will need to be calculated and entered along with an explanation in the pending adjustment screen the same as when entering a change to a child's hours.

H	me Forms Funding Sufficiency Reports	interests	
C	d Details Parent / Carer Details Funding Details Documents Pen	ding Adjustment	
	Iniversal Pending Adjustment umber of Hours Myre Hours 150 eson (500 characters) tarted at the beginning of kerm, 15 hours a week for 10 weeks	Extended Pending Adjustment Number of Hours Reason (500 characters)	✓
	Naximum Values Allowed:	Maximum Values Allowed:	
	ave Cancel *denotes mandatory fields		
0 2	3 Servelec Synergy Ltd		FIS Provider Portal - Part of the Synergy FIS S

Click on Save once entered.

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Changes submitted to the Early Years funding team will be reviewed regularly. Once processed you will be able to view them on the portal by clicking on Funding, then Adjustments

me Forms Funding	Sufficiency Re	eports							
mary Estimates Actuals Ad	ljustments Eligibility	Checker Re	egistered Int	erests					
mit Adjustments: 20	023/24 Summe	r (Apr-A	ug) - 3 a	k 4 Year O	Id CHANGE				
id as Adjustments - jotal	: £489.50, Paid Date	: 21-Feb-2	023						
rpe Date Added Child I	Name	Date of Bi	irth No. Hou	of Override s Rate per Hour	Total Child Weighting Amount	Total Amount @ Provider Rate	Amount	Reason	
hild 21-Feb-2023 Grade	John	05-Oct-20	19 15	0.00	£0.00	£667.50	£667.50	Started at the be term. 15 hours a 10 weeks	ginning of week for
hild 21-Feb-2023 Jones I	Hannah	04-Oct-20	19 -4	0.00	£0.00	(£178.00)	(£178.00)	Parent decided to from 15 hours to from week 3	o change 10 hours
	_								
d Child Send Clair	m								
Status	Child	Pe U A	ending niversal dj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Tot Am (inc	al Funding ount for Term : Adj)	Eligibility Status
Status	Child Grade, John (05-Oct-201	Pe Ui Ar	ending niversal dj Hours 0.00	Pending Extended Adj Hours	Universal Hours (inc Adj) 150.00	Extended Hours (inc Adj)	Tot Am (inc	al Funding ount for Term : Adj) £667.50	Eligibility Status
Status	Child Grade, Johr (05-Oct-201 Jones, Hant (04-Oct-201	Pe U: A: D) aah D)	ending niversal dj Hours 0.00 0.00	Pending Extended Adj Hours 0.00	Universal Hours (inc Adj) 150.00 81.00	Extended Hours (inc Adj)	0.00	al Funding ount for Term : Adj) £667.50 £360.45	Eligibility Status
Status	Child Grade, Johr (05-Oct-201 Jones, Hanr (04-Oct-201 Smith, Davi (12-May-202	Provide Arrowski Arro	ending niversal dj Hours 0.00 0.00	Pending Extended Adj Hours 0.00 0.00	Universal Hours (inc Adj) 150.00 0 81.00 0 110.00	Extended Hours (inc Adj)	0.00 0.00 0.00	al Funding ount for Term £667.50 £360.45 £489.50	Eligibility Status
status	Child Grade, John (05-Oct-201 Jones, Han (04-Oct-201 Smith, Davi (12-May-20)	Pe Ui Ari P) d (0)	ending niversal dj Hours 0.00 0.00	Pending Extended Adj Hours 0.00 0.00	Universal Hours (inc Adj) 0 150.00 0 81.00 0 110.00	Extended Hours (inc Adj)	0.00 0.00	al Funding ount for Term : Adj) £667.50 £360.45 £489.50	Eligibility Status

Click on the arrow next to 'Paid as Adjustments'. The detail expands to show a breakdown by child, of all adjustments.

Important: If the overall Adjustment in Adjustment period 1 is a negative figure (meaning you owe funding back) we will not process it and it will sit in a "Not Paid" area until Adjustment 2. If you still owe Portsmouth Council money after adjustment 2, we will process it and send an invoice to you. At this point you will see it change to paid.

A breakdown of funds is available to you at each stage confirming the funds processed to provide clear records for your finances and to help you understand the breakdown of payments made to you at each stage.

STATISTICS.

EXAMPLE OF AN UPDATED 2 YEAR OLD FUNDING ELIGIBILITY LETTER FOR PARENTS:

	Education
Mr Test Test 33 Allaway Avenue Portsmouth PO6 3PR	Floor 2 Core 6 Civic Offices Guildhall Square Portsmouth PO1 2EA Phone: <u>023 9284 1974</u> Date: 22 March 2023
Dear Mr Test	
This is confirmation that your child, John J year-old funding. This starts the term after	John, 01-Mar-2021, is eligible for two- your child turns two years old.
Please note that the earliest date from wh is the term <u>after</u> your child turns 2.	ich your child can take up a funded place
For example, if your child turns 2 on the 8 th funding from the Spring term starting the 1	^h September, they will be eligible for st January.
If you are awarded the funding after your of your start date will be the date of this letter	shild has turned two and is age eligible r.
Child turns two	Earliest date can start from
D.O.B between 1 April to 31 August	1 ^{al} September
D.O.B between 1 September to 31 December	1" January
D.O.B between 1 January to 31 March	1 ^{ar} April
If you only use your 15 funded hours there chosen childcare provider about their fund message and code UCPI3D safe as you w provider • You are entitled to 15 hours of free total of 570 hours per year) • Some providers will allow you to 'str hours per week	e should be no extra charges, ask your ed hours only offer. Please keep this rill need to show it to your chosen childcare childcare term time (up to 38 weeks, a retch' the hours up to 52 weeks, using less
 Once you qualify for two-year-old full 	inding you can keep the funding even if

 Once you qualify for two-year-old funding you can keep the funding even if your circumstances change, i.e., you start work

What next?

Visit portsmouth.gov.uk/childcare to search for childcare Early Education Funding Team on 023 9284 1974 or email 2yroldfunding@portsmouthcc.gov.uk if you would lik	provision, or contact the the more help?
	www.portsmouth.gov.uk

FOR QUERIES:

Relating to funding please contact <u>EYFunding@portsmouthcc.gov.uk</u> as normal.

For login issues please contact SynergySupport@portsmouthcc.gov.uk