

# Synergy Guidance: Education Portal for Providers

## Document Identity

| Document Information |               |
|----------------------|---------------|
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## Document History

| Initials | Version | Date       | Comment                         |
|----------|---------|------------|---------------------------------|
| RU       | 1.0     | 26/01/2023 | Initial guidance                |
| VS       | 2.0     | 29/03/2023 | Revised guidance and formatting |
| 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:

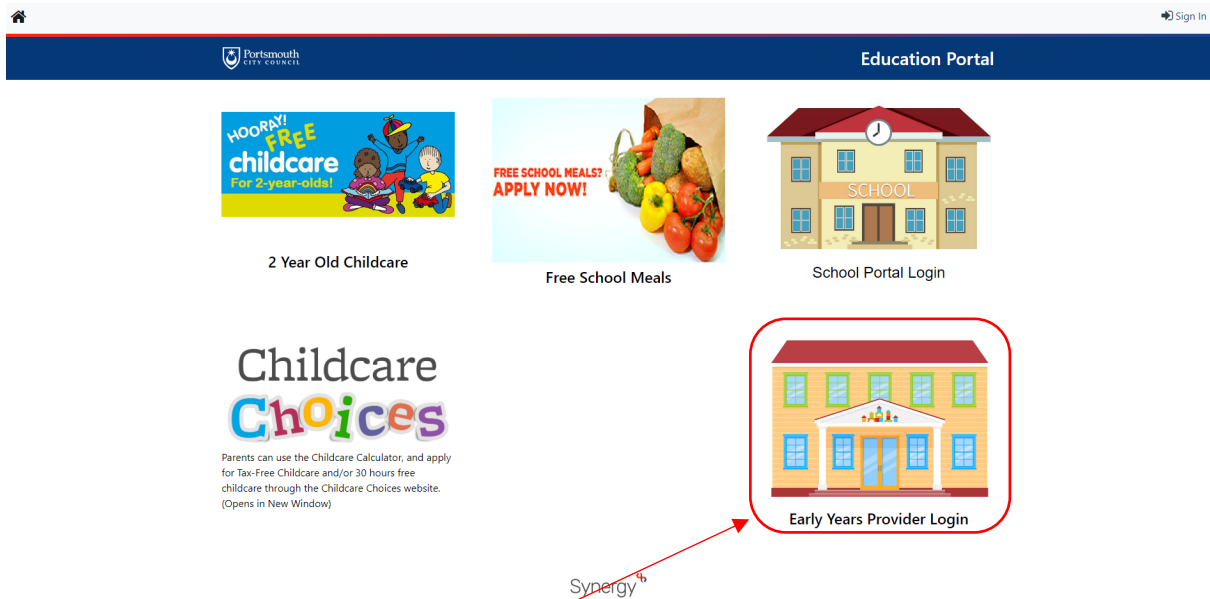
1. **Actual Period:** where child level data is required, forecasting who will be accessing at your Early Years Setting next term and the number of hours that they are attending. This will open at the end of the previous term.
2. **Adjustment Period 1:** opens at the beginning of the new term so you 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.

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

| Spring Term                  |     |                              | Summer Term                  |     |     |                              |     | Autumn Term                  |     |     |                              |
|------------------------------|-----|------------------------------|------------------------------|-----|-----|------------------------------|-----|------------------------------|-----|-----|------------------------------|
| 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         |

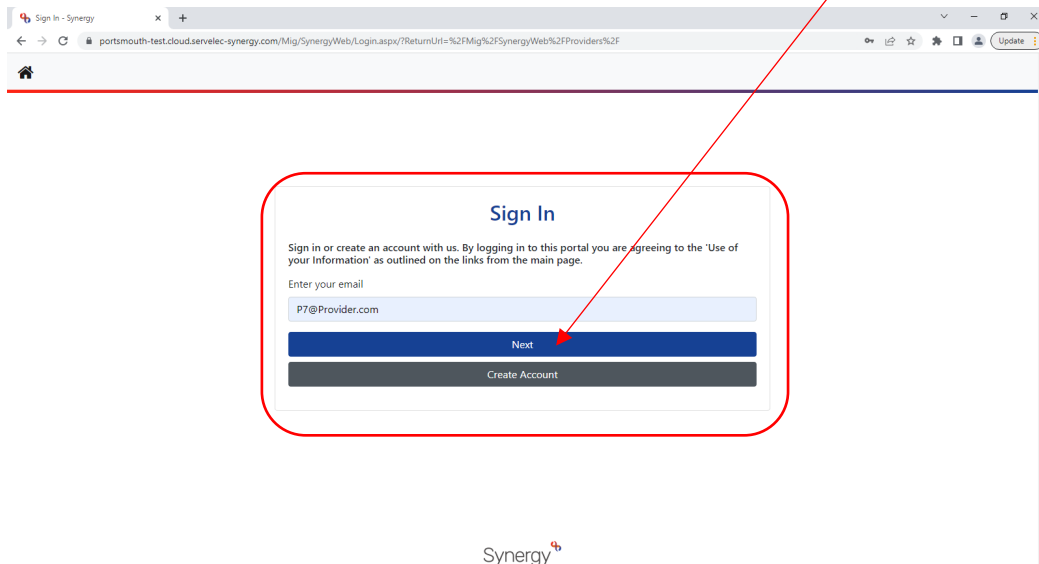
## LOGGING INTO THE EDUCATION PORTAL

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

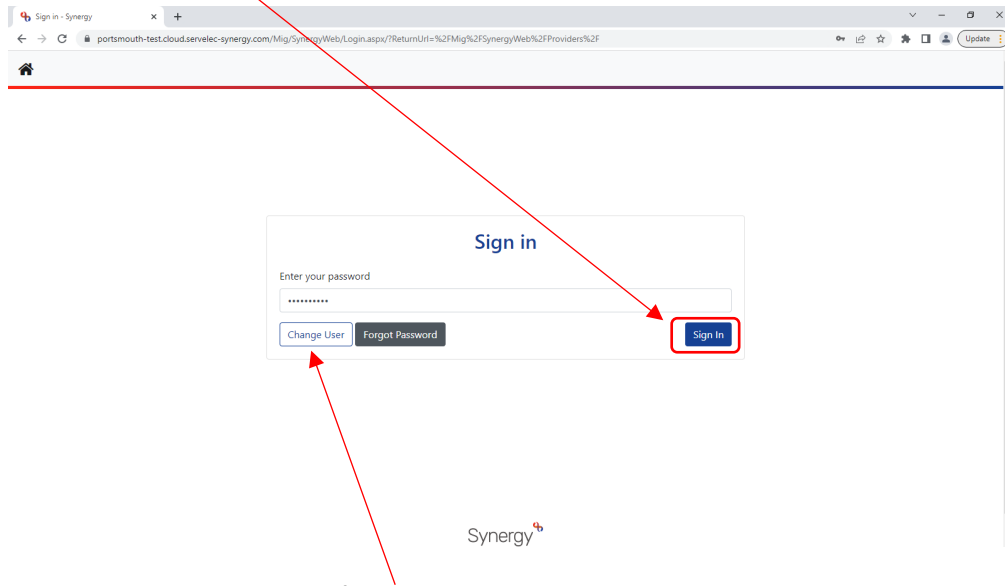


Select the Early Years Provider Login section

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

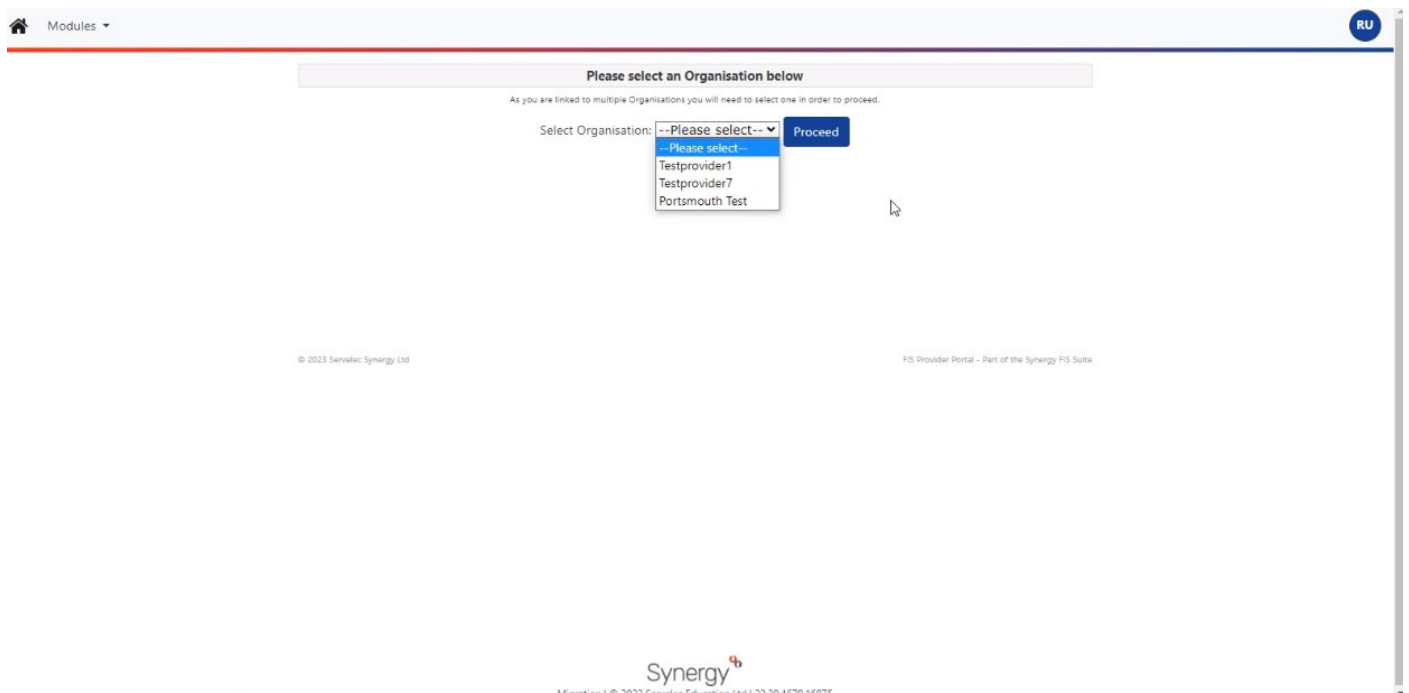


Enter your password and click Sign In.



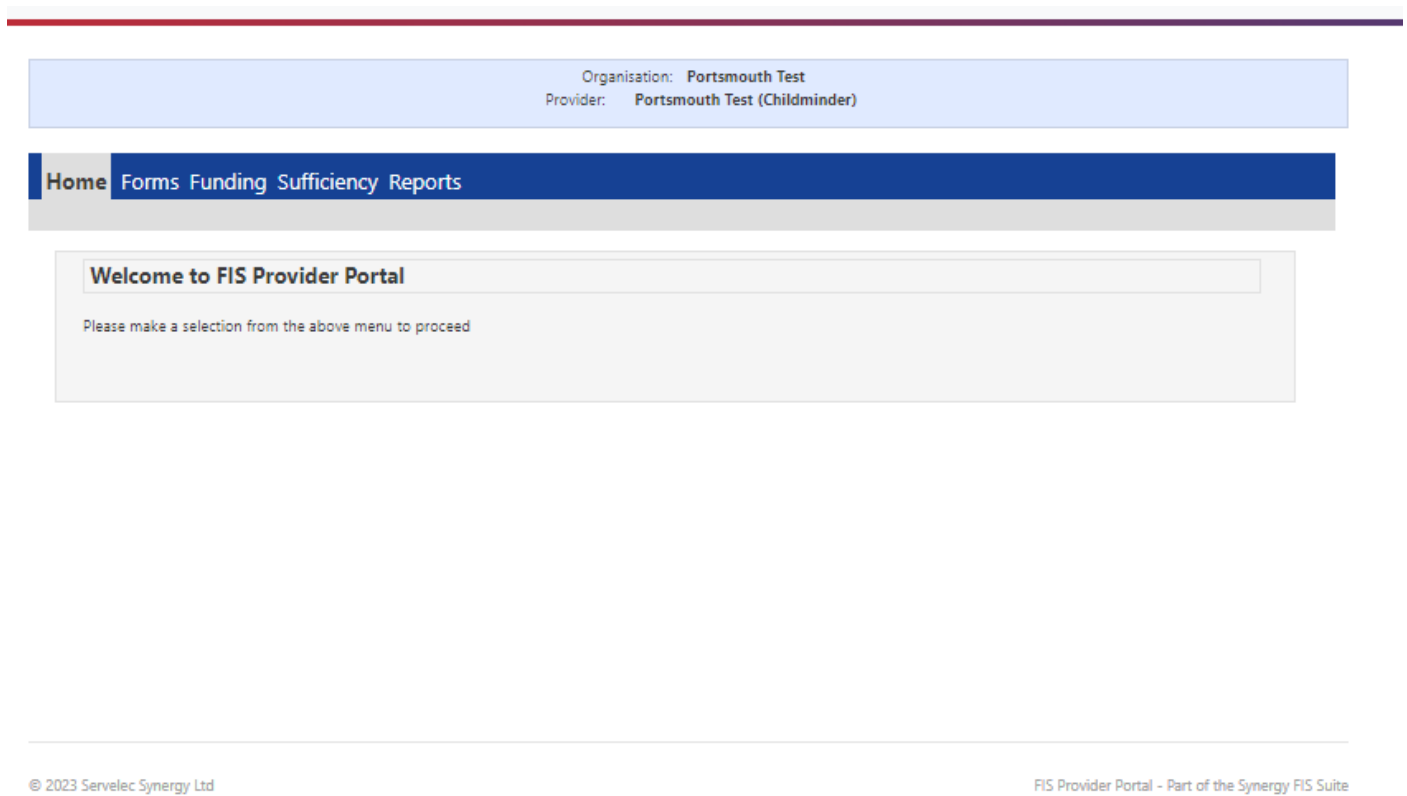
\*If you have forgotten your password, click the forgot password link to get a temporary link to change your password or get in touch with the Early Years team on 023 9284 1974 who will be able to assist you.

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:













\*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:



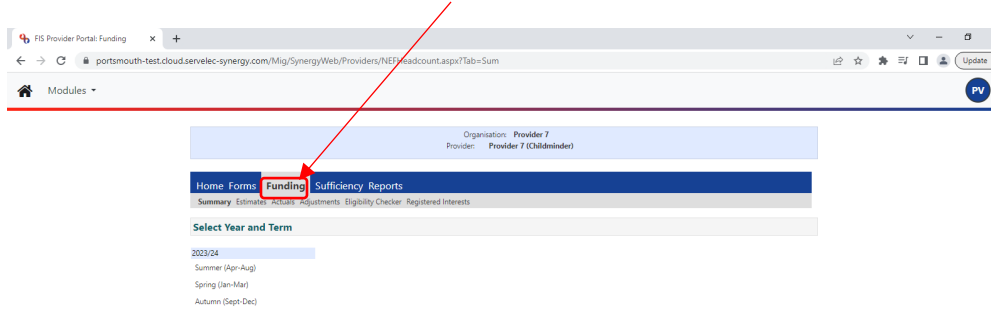
## WARNINGS YOU MAY SEE ON THE EDUCATION PORTAL

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.

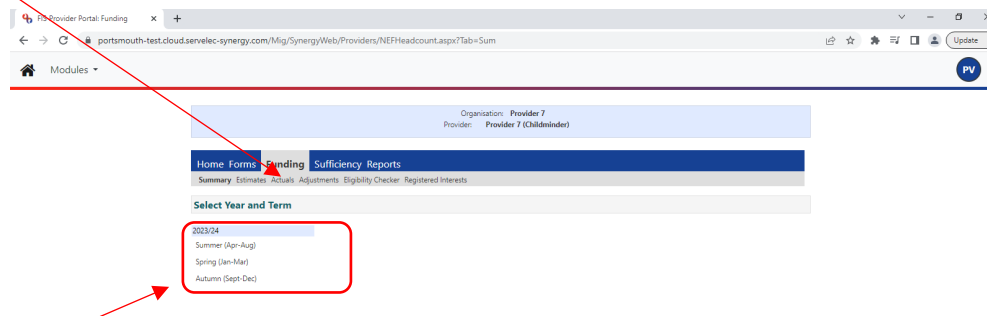
|   |  |
|---|--|
|   New, Unsubmitted Child    | You have entered the child's details but not yet sent your claim.          |
|   Unsubmitted Claim         | Not yet submitted to the LA  |
|   New, Awaiting LA Download | New adjustment, sent to the LA and waiting for them to process.            |
|   Awaiting LA Download      | You have sent your claim to the LA and are waiting for them to process it. |
|   Claim Rejected            | Claim was rejected by the LA   |

## ENTERING FUNDING DETAILS

Once logged into the portal click on the funding tab



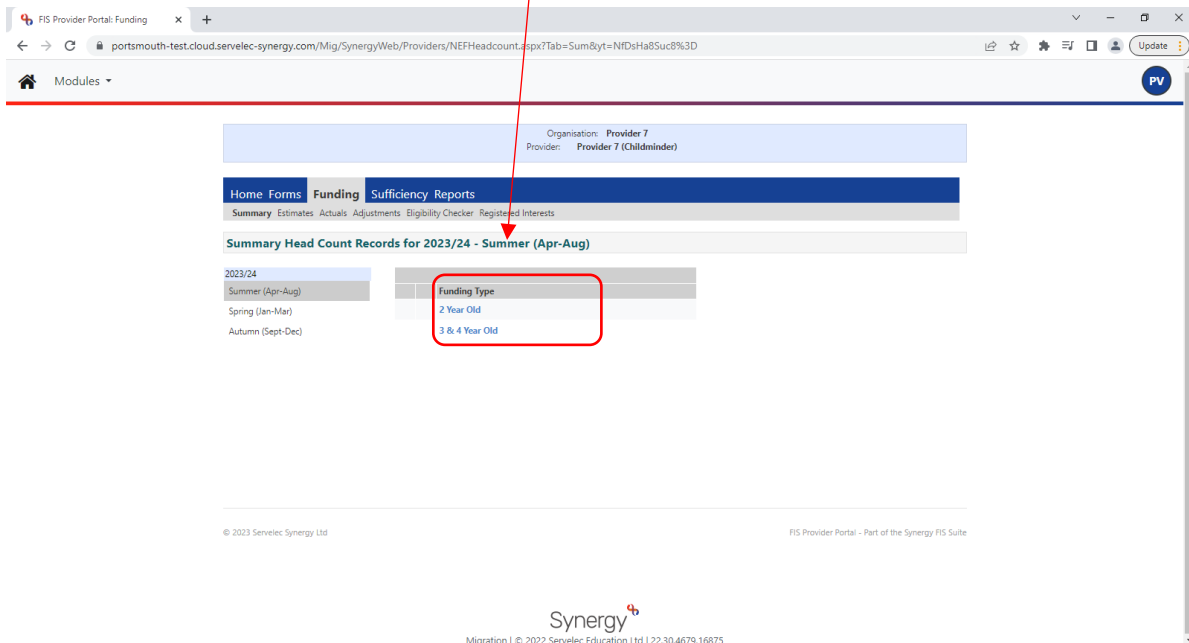
Click on Actuals



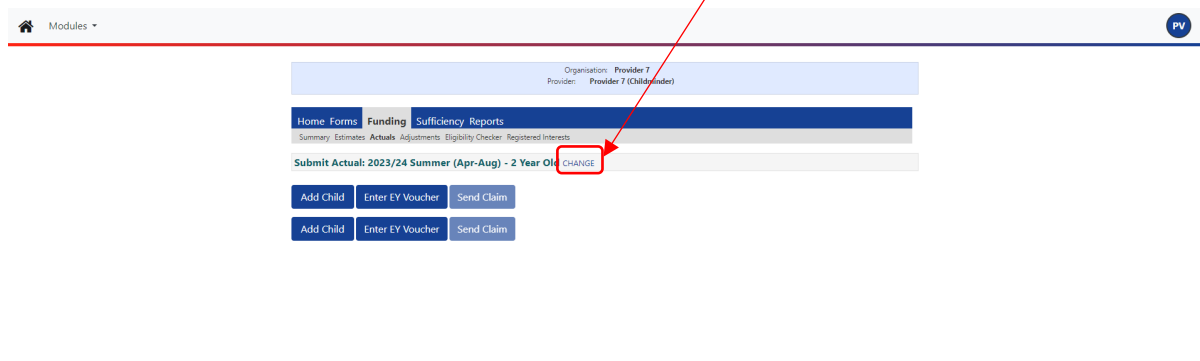
Select the year and term that you want to enter data in for (for the purpose of this guide it will be Summer 2023/24)

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

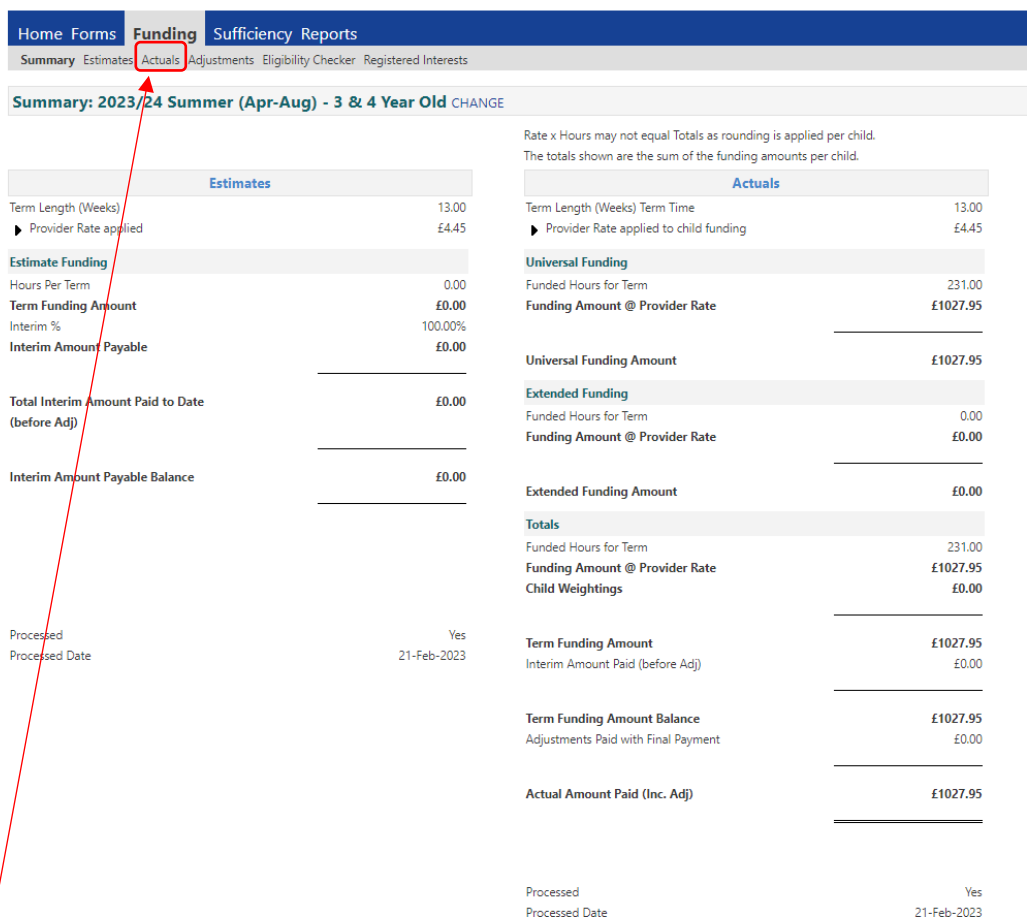
Select the funding type you wish to review (for the purpose of this guide it will be 3 & 4 Year Old)



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



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.



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.

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficientcy Reports  
Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Submit Actual: 2023/24 Summer (Apr-Aug) - 3 & 4 Year Old CHANGE

Add 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                                 |                  |                    |

Add Child Send Claim

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## UPDATING A CHILD'S DETAILS

Click on the child's name.

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficientcy Reports  
Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Submit Actual: 2023/24 Summer (Apr-Aug) - 3 & 4 Year Old CHANGE

Add Child Send Claim

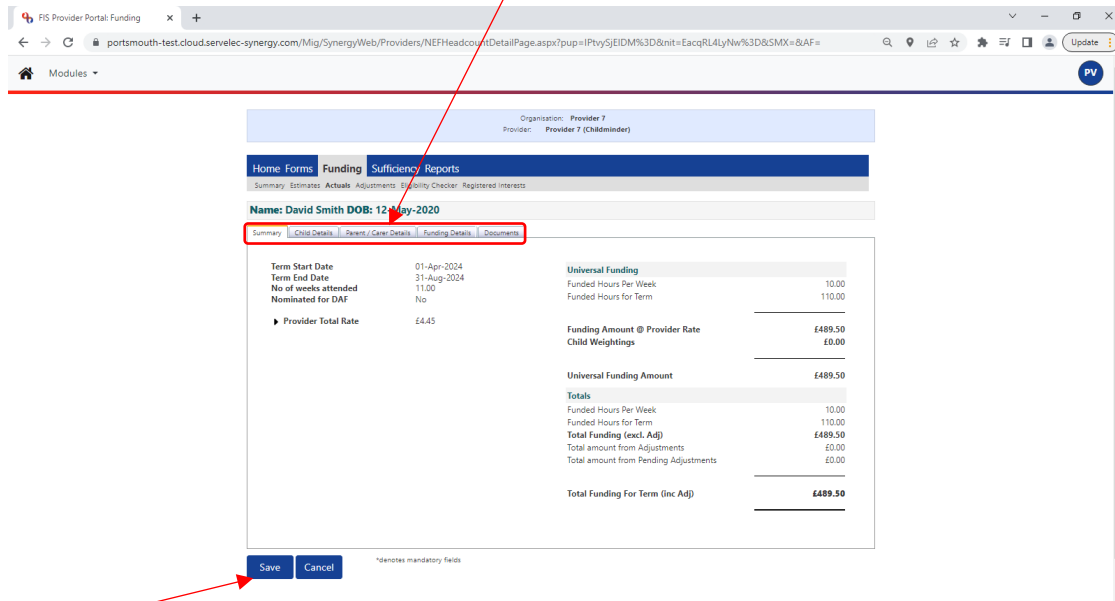
|   | Status                 | Child                       | Universal Hours (inc Adj) | Extended Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings | Eligibility Status |
|---|------------------------|-----------------------------|---------------------------|--------------------------|---|------------------|--------------------|
| 🚫 | 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                                 |                  |                    |

Add Child Send Claim

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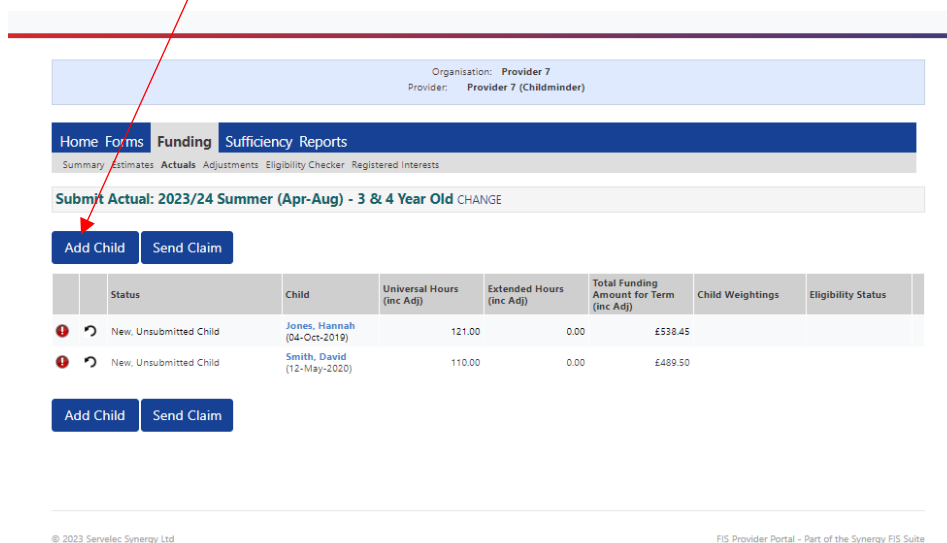


You will be presented with a summary of that child with tabs you can click on to update Child Details, Parent / Carer Details, Funding Details and Documents.



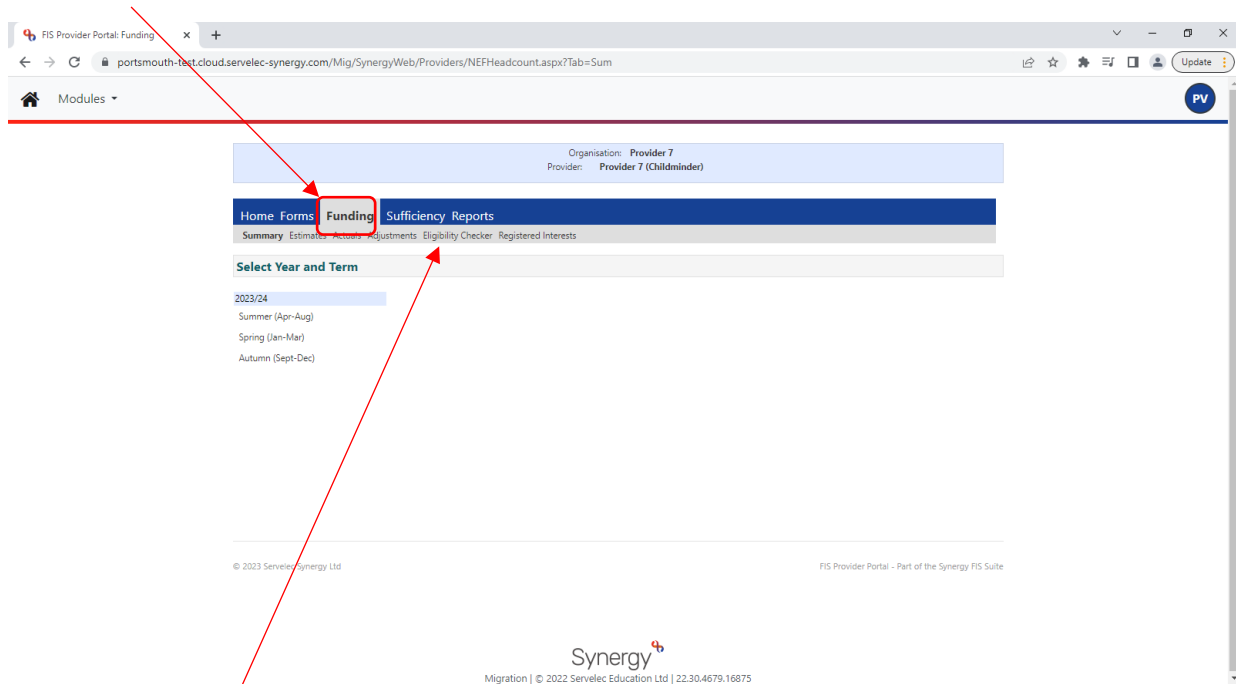
Press Save to update the values entered.

To add a child, click the Add Child button.



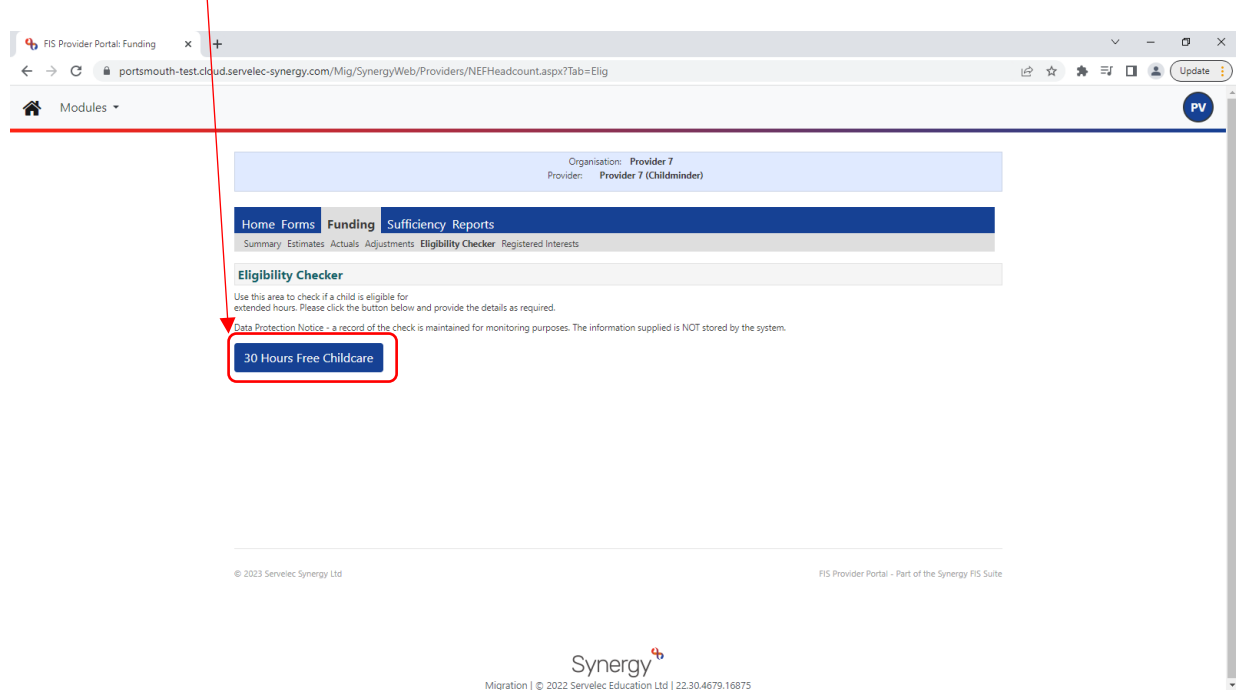
If you are claiming 30hrs on the headcount use the eligibility checker **BEFORE** adding the child.

Click on the funding tab.



Click on 'Eligibility Checker'

Click on the 30 hours free childcare



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

A pop-up form titled "30 Hours Free Childcare". It contains the following fields: Eligibility Code\*, Child Date of Birth\*, Parent/Carer Forename, Parent/Carer Surname, Parent/Carer NI Number\*, Consent must be given for this (with an "Eligibility Check" checkbox), Partner Forename, Partner Surname, and Partner NI Number. A note at the bottom states "\*denotes mandatory fields". There are "Submit" and "Cancel" buttons at the bottom.

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.

The "Child Details" form in the system. It includes fields for: Forename\*, Middle Name, Surname\*, DOB\*, Proof of DOB, Gender\* (Male/Female), Preferred Surname, Ethnicity\*, and SEN COP Stage\*. On the right, there is a "Search for an Address" section with "Primary" and "Postcode\*" fields and a "Search" button. Below that is an "Address" section with "Address Line 1\*", "Address Line 2", "Address Line 3", "Locality", "Town", "County", and "Postcode\*" fields. "Save" and "Cancel" buttons are at the bottom.

If the software returns a valid address, click on Confirm

The "Child Details" form showing search results. The "Postcode\*" field is populated with "PO1 1BG". The "Address" section shows "153 Commercial Road", "Portsmouth", and "PO1 1BG". The "Search" button is disabled, and new buttons "Enter Manually" and "Confirm" are visible. "Save" and "Cancel" buttons are at the bottom.

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 enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for extended hours.  
Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.  
Details are optional but if entered then at least Forename, Surname and Ni or NASS Number must be filled in.

**Parent / Carer Details**  
Forename:   
Surname:   
DOB:   
 Ni or  NASS Number  
Tick to give consent to Eligibility Checking for:  EYPP  30H

**Partner Details**  
Forename:   
Surname:   
DOB:   
 Ni or  NASS Number  
Tick to give consent to Eligibility Checking for:  EYPP  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.

Provider: Provider 7 (Childminder)

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Child Details Parent / Carer Details Funding Details Documents

**Funding Details**  
Start Date\*:   
End Date\*:   
Default Term Dates  
Weeks Attended in Term\*:   
Present during Census:   
Attends Two Days or More:   
Nominated for DAF\*:  Yes  No  
Universal Funded Hours per Week:   
Universal Hours\*:   
Extended Funded Hours per Week:   
Extended Hours\*:   
30H Eligibility Code:   
30 Hours Free Childcare  
Eligible for 30H:   
Total Funded Hours per Week:   
Total Funded:

**Attendance Days**  
Attends Monday:  Yes  No  
Attends Tuesday:  Yes  No  
Attends Wednesday:  Yes  No  
Attends Thursday:  Yes  No  
Attends Friday:  Yes  No  
Attends Saturday:  Yes  No  
Attends Sunday:  Yes  No

**Non-Funded Hours per Week**  
Non-Funded Hours\*:   
If this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer.

**Maximum Values Allowed:**  
Number of Weeks: 13.00  
Universal Weekly Hours: 10.00  
Universal Yearly Hours: 380.00  
Extended Weekly Hours: 20.00  
Extended Yearly Hours: 380.00

Save Cancel \*denotes mandatory fields

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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.

If nominated for DAF evidence in the form of a copy of the DLA award letter **MUST** be uploaded.

The attending 2 days or more **must** be ticked.

If the child is not doing extended hours, 0 will need to be entered here.

For non-funded hours you must enter a value eg.0

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

If you are stretching entitlement please tick here - if you cannot do this and think you should be able to please contact [EYFunding@portsmouthcc.gov.uk](mailto:EYFunding@portsmouthcc.gov.uk) or telephone on 023 9284 1974.

**Name: Leonardo Dicaprio DOB: 01-Mar-2021**

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

**Funding Details**

Start Date\* 01-Jan-2031  
End Date\* 31-Mar-2031  
Default Term Dates  
Weeks Attended in Term\* 11.00  
Present during Census   
Attends Two Days or More   
Stretching Entitlement

**Attendance Days**

Attends Monday  Yes  No  
Attends Tuesday  Yes  No  
Attends Wednesday  Yes  No  
Attends Thursday  Yes  No  
Attends Friday  Yes  No  
Attends Saturday  Yes  No  
Attends Sunday  Yes  No

**Universal Funded Hours per Week**  
Universal Hours\* 15.00

**Non-Funded Hours per Week**  
Non-Funded Hours\* 10.00

ⓘ if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carers

**Maximum Values Allowed:**

Number of Weeks: 13.00  
Universal Weekly Hours: 15.00  
Universal Termly Hours: 195.00  
Universal Yearly Hours: 780.00

Save Cancel \*denotes mandatory fields

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

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

**Submit Actual: 2023/24 Summer (Apr-Aug) - 3 & 4 Year Old CHANGE**

Add 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                                 |                  |                    |

Add Child Send Claim

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When you send your claim, it will show the submission was successful. The status of the claim will change as Portsmouth Early Years team process your claim and can be found in the funding tab

Organisation: Portsmouth Test  
Provider: Portsmouth Test (Childminder)

Home Forms **Funding** Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Submission Successful

Submit Actual: 2030/31 Spring (Jan-Mar) - 2 Year Old CHANGE

Add Child Enter EY Voucher Send Claim

|  | Status                    | Child                            | Funded Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings |
|--|---------------------------|----------------------------------|------------------------|---|------------------|
|  | New, Awaiting LA Download | Berry, Mary (05-Feb-2020)        | 195.00                 | £975.00                                 |                  |
|  | New, Awaiting LA Download | Dicaprio, Leonardo (01-Mar-2021) | 165.00                 | £825.00                                 |                  |
|  | Awaiting LA Download      | Nicholas, Jack (05-Jun-2020)     | 55.00                  | £275.00                                 |                  |

Add Child Enter EY Voucher Send Claim

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)

Home **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 Provider: Portsmouth Test - Childminder

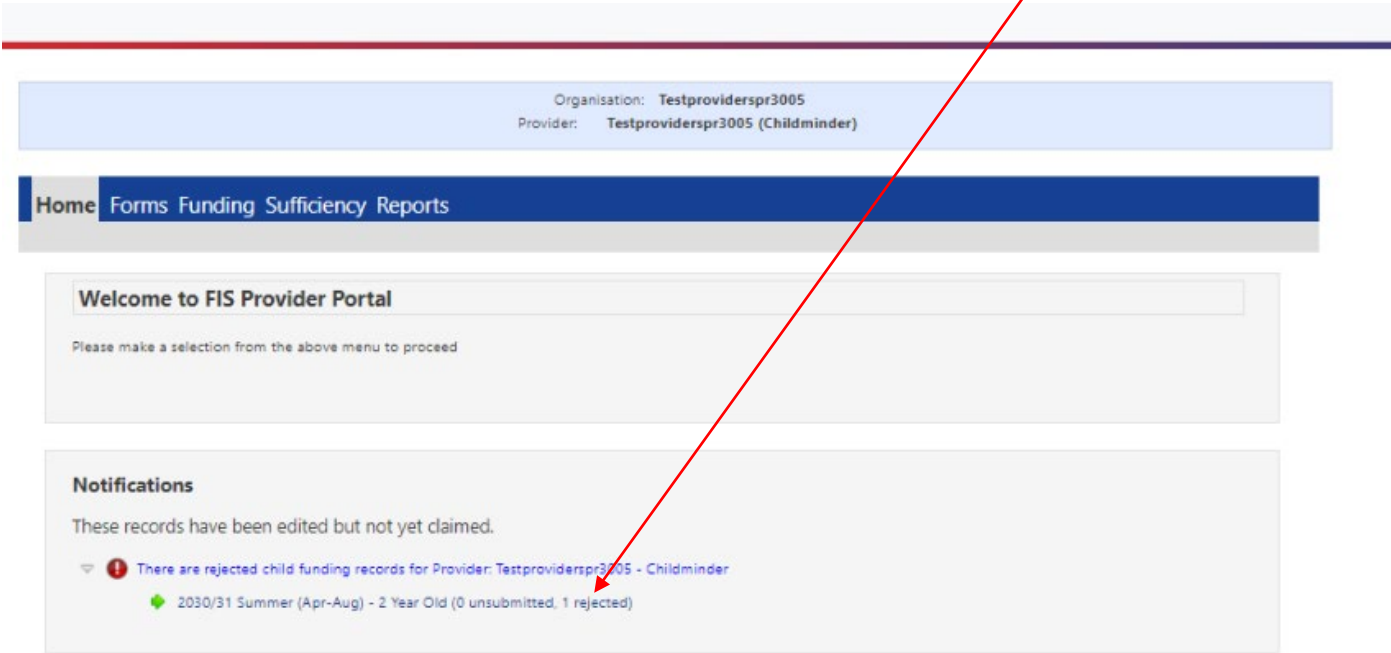
- 2030/31 Spring (Jan-Mar) - 2 Year Old (2 unsubmitted, 0 rejected)

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

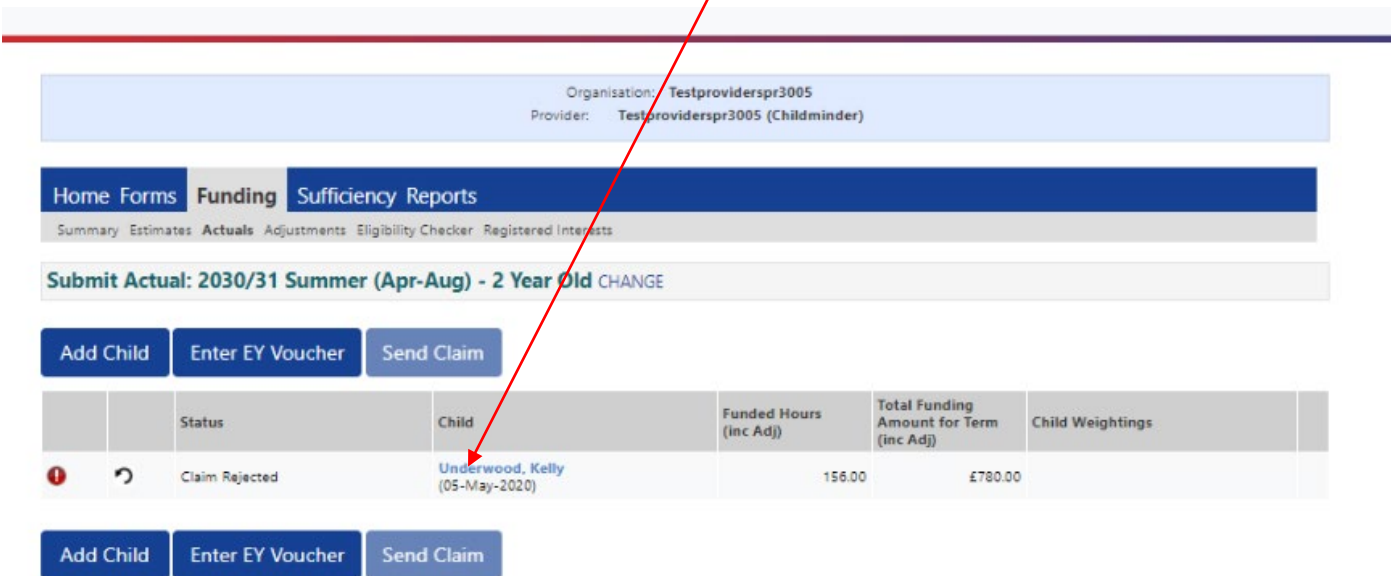


### IF YOUR CLAIM IS REJECTED

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



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





Notes from the LA will show here

Organisation: Testproviderspr3005  
Provider: Testproviderspr3005 (Childminder)

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Name: Kelly Underwood DOB: 05-May-2020

Summary Child Details Parent / Care Details Funding Details Documents

|  |             |   |                |
|--|-------------|---|----------------|
| Term Start Date                          | 01-Apr-2031 | <b>Universal Funding</b>                |                |
| Term End Date                            | 31-Aug-2031 | Funded Hours Per Week                   | 12.00          |
| No of weeks attended                     | 13.00       | Funded Hours for Term                   | 156.00         |
| Provider Total Rate                      | £5.00       |   |                |
| <b>Claim Rejected</b>                    |             | <b>Funding Amount @ Provider Rate</b>   | <b>£780.00</b> |
| Universal hours exceeded - please revise |             | <b>Child Weightings</b>                 | <b>£0.00</b>   |
|  |             | <b>Universal Funding Amount</b>         | <b>£780.00</b> |
|  |             | <b>Totals</b>                           |                |
|  |             | Funded Hours Per Week                   | 12.00          |
|  |             | Funded Hours for Term                   | 156.00         |
|  |             | <b>Total Funding (excl. Adj)</b>        | <b>£780.00</b> |
|  |             | Total amount from Adjustments           | £0.00          |
|  |             | Total amount from Pending Adjustments   | £0.00          |
|  |             | <b>Total Funding For Term (inc Adj)</b> | <b>£780.00</b> |

Save Cancel \*denotes mandatory fields

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

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

View Actuals: 2023/24 Summer (Apr-Aug) - 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 |
|-----------------------------|---------------------------|--------------------------|---|------------------|--------------------|
| 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:

| Estimates   |              | Actuals                                  |                 |
|---|--------------|--|-----------------|
| Term Length (Weeks)                                   | 13.00        | Term Length (Weeks) Term Time            | 13.00           |
| ▶ Provider Rate applied                               | £4.45        | ▶ Provider Rate applied to child funding | £4.45           |
| <b>Estimate Funding</b>                               |              | <b>Universal Funding</b>                 |                 |
| Hours Per Term  | 0.00         | Funded Hours for Term                    | 231.00          |
| Term Funding Amount                                   | £0.00        | Funding Amount @ Provider Rate           | £1027.95        |
| Interim %   | 100.00%      |  |                 |
| Interim Amount Payable                                | £0.00        | <b>Universal Funding Amount</b>          | <b>£1027.95</b> |
|   |              |  |                 |
| <b>Total Interim Amount Paid to Date (before Adj)</b> | <b>£0.00</b> | <b>Extended Funding</b>                  |                 |
|   |              | Funded Hours for Term                    | 0.00            |
|   |              | Funding Amount @ Provider Rate           | £0.00           |
|   |              | <b>Extended Funding Amount</b>           | <b>£0.00</b>    |
| <b>Interim Amount Payable Balance</b>                 | <b>£0.00</b> | <b>Totals</b>                            |                 |
|   |              | Funded Hours for Term                    | 231.00          |
|   |              | Funding Amount @ Provider Rate           | £1027.95        |
|   |              | Child Weightings                         | £0.00           |
|   |              | <b>Term Funding Amount</b>               | <b>£1027.95</b> |
| Processed   | Yes          | Interim Amount Paid (before Adj)         | £0.00           |
| Processed Date  | 21-Feb-2023  | <b>Term Funding Amount Balance</b>       | <b>£1027.95</b> |
|   |              | Adjustments Paid with Final Payment      | £0.00           |
|   |              | <b>Actual Amount Paid (Inc. Adj)</b>     | <b>£1027.95</b> |

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

| 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                                |                  |                    |
| Test, Letitia (06-Oct-2019)  | 110.00                    | 0.00                     | £1378.00                                |                  |                    |
| Test, Marcus (01-Apr-2020)   | 50.00                     | 0.00                     | £250.00                                 |                  |                    |

Disability Access Funding will appear here, on the adjustments screen

| Type  | 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]. |

## 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.

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding **Sufficiency Reports**  
Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 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 |
|--------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
|        | Jones, Hannah (04-Oct-2019) | 0.00                        | 0.00                       | 121.00                    | 0.00                     | £538.45                                 |                    |
|        | Smith, David (12-May-2020)  | 0.00                        | 0.00                       | 110.00                    | 0.00                     | £489.50                                 |                    |

Add Child Send Claim

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To update a child at your setting click on their name

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficiency Reports  
Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 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 |
|--------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
|        | Jones, Hannah (04-Oct-2019) | 0.00                        | 0.00                       | 121.00                    | 0.00                     | £538.45                                 |                    |
|        | Smith, David (12-May-2020)  | 0.00                        | 0.00                       | 110.00                    | 0.00                     | £489.50                                 |                    |

Add Child Send Claim

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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)

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals 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**  
Number of Hours: Less Hours 40  
Reason (500 characters): Parent decided to change from 15 hours to 10 hours from week 3  
Maximum Values Allowed: Universal Yearly Hours: 570.00

**Extended Pending Adjustment**  
Number of Hours: [ ]  
Reason (500 characters): [ ]  
Maximum Values Allowed: Extended Yearly Hours: 1140.00

Save Cancel \*denotes mandatory fields

**Example:** it's a 10 week term and the child is 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.

Press Save once completed.

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

Home Forms **Funding** Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Name: Hannah Jones DOB: 04-Oct-2019

Summary Child Details Parent / Carer Details **Funding Details** Documents Pending Adjustment

**Funding Details**

Start Date\* 01-Apr-2024

End Date\* 30-Apr-2024

Weeks Attended in Term\* 11.00

Present during Census

Attends Two Days or More

Nominated for DAF  Yes  No

Universal Funded Hours per Week

Universal Hours\* 11.00

Extended Funded Hours per Week

Extended Hours\* 0.00

30H Eligibility Code

Eligible for 30H

Total Funded Hours per Week

Total Funded: 11.00

Attendance Days

Attends Monday  Yes  No

Attends Tuesday  Yes  No

Attends Wednesday  Yes  No

Attends Thursday  Yes  No

Attends Friday  Yes  No

Attends Saturday  Yes  No

Attends Sunday  Yes  No

Non-Funded Hours per Week

Non-Funded Hours\* 0.00

if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer

**Maximum Values Allowed:**

|                         |         |
|-------------------------|---------|
| Number of Weeks:        | 13.00   |
| Universal Weekly Hours: | 15.00   |
| Universal Yearly Hours: | 570.00  |
| Extended Weekly Hours:  | 30.00   |
| Extended Yearly Hours:  | 1140.00 |

Save Cancel \*denotes mandatory fields

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Change the End Date and click on Save

It will become an unsubmitted claim

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficiency Reports

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Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 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 |
|---|-------------------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
| ! | 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

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Press Send Claim to submit to the LA.

## ADDING A CHILD

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

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 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 |
|---|-------------------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
| ! | 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

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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.

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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.

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Click on Save once entered.

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms **Funding** Sufficiency Reports

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Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 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 |
|-------------------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
| 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

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Once you have made all the changes you need to click on Send Claim

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

Organisation: Provider 7  
Provider: Provider 7 (Childminder)

Home Forms **Funding** Sufficiency Reports

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Submit Adjustments: 2023/24 Summer (Apr-Aug) - 3 & 4 Year Old CHANGE

▼ Paid as Adjustments Total: £489.50, Paid Date: 21-Feb-2023

| Type  | 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 | 21-Feb-2023 | Grade John    | 05-Oct-2019   | 150.00       |                        | £0.00                        | £667.50                      | £667.50   | Started at the beginning of term. 15 hours a week for 10 weeks |
| Child | 21-Feb-2023 | Jones, Hannah | 04-Oct-2019   | -40.00       |                        | £0.00                        | (£178.00)                    | (£178.00) | Parent decided to change from 15 hours to 10 hours from week 3 |

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 |
|--------|-----------------------------|-----------------------------|----------------------------|---------------------------|--------------------------|---|--------------------|
|        | Grade, John (05-Oct-2019)   | 0.00                        | 0.00                       | 150.00                    | 0.00                     | £667.50                                 |                    |
|        | Jones, Hannah (04-Oct-2019) | 0.00                        | 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

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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.

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



Mr Test Test  
33 Allaway Avenue  
Portsmouth  
PO6 3PR

**Education**  
Floor 2 Core 8  
Civic Offices  
Guildhall Square  
Portsmouth  
PO1 2EA  
Phone: [023 9284 1974](tel:02392841974)  
Date: 22 March 2023

Dear Mr Test

This is confirmation that your child, **John John, 01-Mar-2021**, is eligible for two-year-old funding. This starts the term after your child turns two years old. |

Please note that the earliest date from which your child can take up a funded place is the term **after** your child turns 2.

For example, if your child turns 2 on the 8<sup>th</sup> September, they will be eligible for funding from the Spring term starting the 1<sup>st</sup> January.

If you are awarded the funding after your child has turned two and is age eligible your start date will be the date of this letter.

| Child turns two                          | Earliest date can start from |
|--|------------------------------|
| D.O.B between 1 April to 31 August       | 1 <sup>st</sup> September    |
| D.O.B between 1 September to 31 December | 1 <sup>st</sup> January      |
| D.O.B between 1 January to 31 March      | 1 <sup>st</sup> April        |

If you only use your 15 funded hours there should be no extra charges, ask your chosen childcare provider about their funded hours only offer. Please keep this message and code UCPI3D safe as you will need to show it to your chosen childcare provider

- You are entitled to 15 hours of free childcare term time (up to 38 weeks, a total of 570 hours per year)
- Some providers will allow you to 'stretch' the hours up to 52 weeks, using less hours per week
- 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](http://portsmouth.gov.uk/childcare) to search for childcare provision, or contact the Early Education Funding Team on [023 9284 1974](tel:02392841974) or email [2yoldfunding@portsmouthcc.gov.uk](mailto:2yoldfunding@portsmouthcc.gov.uk) if you would like more help?

[www.portsmouth.gov.uk](http://www.portsmouth.gov.uk)

**FOR QUERIES:**

Relating to funding please contact [EYFunding@portsmouthcc.gov.uk](mailto:EYFunding@portsmouthcc.gov.uk) as normal.

For login issues please contact [SynergySupport@portsmouthcc.gov.uk](mailto:SynergySupport@portsmouthcc.gov.uk)