

## Provider Portal – Adding a new child to a headcount

You may input and save this information at any time please do not click on “Send Claim” prior to headcount day (details of which can be found in the term funding pack issued by the FIS Team).

### STEP 1:

Select “Funding” tab and then select “Actuals”

### STEP 2:

Find the required term / funding type for the headcount you would like to complete and click on “Select” from the relevant row.

### STEP 3:

A child can be added to the headcount if their details are not currently showing. To start adding a new child click on the “Add Child” button.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with 'HOME', 'FUNDING', and 'IMAGES'. Below this, there are sub-tabs: 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The 'Actuals' tab is selected. Below the navigation, there is a section titled 'Provider Headcount Records' with a table. The table has columns for 'Actuals', 'Year', 'Term', and 'Funding Type'. The 'Actuals' column contains 'Select' buttons for each row. The table data is as follows:

Actuals	Year	Term	Funding Type
Select	2018/19	EEF Autumn	2 Year Olds
Select	2018/19	EEF Autumn	3&4 Year Olds
Select	2017/18	EEF Summer	2 Year Olds
Select	2017/18	EEF Summer	4 Year Olds
Select	2017/18	EEF Summer	3 Year Olds

Below the table, there is a pagination control: 'Previous | Page: 1 2 3 ... 17 | Next [83 Results]'. At the bottom of the page, there is a footer: '© 2019 Servelec Synergy Ltd' and 'FIS Provider Portal - Part of the Synergy FIS Suite'.

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**STEP 4:**

The first set of information to enter relates to the details of the child. Mandatory fields are shown in bold text and have an \* at the end. It is a statutory requirement to check a child's date of birth before making a claim for funding. Please tick the "Proof of DOB" to confirm that you have seen the original birth certificate and a copy is held by the setting.

Synergy FIS Provider Portal

Welcome [Redacted]

Organisation: [Redacted] Open New Tab ?

Provider: [Redacted]

HOME **FUNDING** IMAGES

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details

**Child Details**

Forename\* [Redacted]  
Middle Name [Redacted]  
Surname\* [Redacted]  
DOB\* [Redacted]  
Proof of DOB   
Gender\*  Male  Female  
Preferred Surname [Redacted]  
Ethnicity\* <unknown> v  
SEN COP Stage <Unknown> v

**Address**

Address Line 1\* [Redacted]  
Address Line 2 [Redacted]  
Address Line 3 [Redacted]  
Locality [Redacted]  
Town [Redacted]  
County [Redacted]  
Postcode\* [Redacted]

Save Cancel \*denotes mandatory fields

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**STEP 5: (3 & 4 Year Old Only)**

Click on the "Parent / Carer Details" tab to add the information required to complete the Early Years Pupil Premium (EYPP) check or to validate a 30hr code. The parents date of birth is also mandatory for an EYPP check. You must obtain consent for a 30hr and EYPP check from the parent/carer. Failure to tick the consent box will result in no 30hr or EYPP check being carried out.

**NOTE:** You do not need to include information on this tab if the child is not claiming 30hr funding or the parent has not provided the information required to complete an EYPP check.

Synergy FIS Provider Portal

Welcome [Redacted] [User Settings](#) | [Sign Out](#)

Organisation: [Redacted] Open New Tab ?

Provider: [Redacted]

HOME **FUNDING** IMAGES

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details

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 [Redacted]  
Surname [Redacted]  
DOB [Redacted]  
 NI or  NASS Number [Redacted]

Tick to give consent to Eligibility Checking for  EYPP  30H

**Partner Details**

Forename [Redacted]  
Surname [Redacted]  
DOB [Redacted]  
 NI or  NASS Number [Redacted]

Tick to give consent to Eligibility Checking for  EYPP  30H

Save Cancel \*denotes mandatory fields

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**STEP 6:** Click on the “Funding Details” tab.

Click on the “Default Term Dates” button to populate the “Term Start Date” and “Term End Date” fields.

Enter the number of weeks that the child is attending during the term. Further information on the number of weeks in a term can be found on the EEF webpages.

**STEP 8: FUNDED HOURS NOTE:**

The Universal Hours, Non-Funded Hours and Extended Hours fields are mandatory. Enter 0 if applicable.

It is important that you determine whether the funded hours are universal or extended from the parent.

**STEP 10:**

Click “save”. The child record will then show in the headcount list.

HOME **FUNDING** IMAGES

Summary Estimates **Actuals** Adjustments Eligibility Checker

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

**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

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\*

**Extended Funded Hours per Week**

Extended Hours\*

30H Eligibility Code

**30 Hours Free Childcare**

Eligible for 30H

**Total Funded Hours per Week**

Total Funded:

**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/carers

**Maximum values Allowed:**

Number of Weeks: **13.00**

Universal Weekly Hours: **10.00**

Universal Termly Hours: **130.00**

Universal Yearly Hours: **380.00**

Extended Weekly Hours: **10.00**

Extended Termly Hours: **130.00**

Extended Yearly Hours: **380.00**

Save Cancel \*denotes mandatory fields

**STEP 7:** Select the “Present During Census” checkbox if you know they are present at headcount. Select the “Attends Two Days or More” checkbox as appropriate. This will be required if the child is attending other setting(s).

**(3 & 4-year olds only)** Select Yes or No for the “Nominated for DAF” field (this is the Disability Access Fund). Please send relevant paperwork as per the DAF guidance on the EEF webpages.

If a child is going to stretch their funding please ensure the Stretching Entitlement box is checked.

**STEP 9: EXTENDED HOURS** If the child is receiving extended hours at your setting please include these in the “Extended Hours” field and add the 30H Eligibility Code. Click on the “30 Hours Free Childcare” button to complete an eligibility check.

**NOTE:** A valid 30hr code is required to add a value to the “Extended Hours” field. The “Eligible for 30H” box will be checked where a 30hr code has been successfully checked.

**NEXT STEPS:** When the child details have been added the “Send Claim” button will be available. Please do not submit the headcount claim to SMBC prior to headcount day (details of which can be found in the term funding pack issued by the FIS Team).

When the send claim button is clicked only the records that have been changed since the previous submission will be passed to SMBC.

When the details have been submitted the status of the records that have been submitted will change to “Edit Pending, Submitted”. The status will revert to “Unchanged” once the claim has been accepted by the FIS Team.