

Provider Portal – Updating an existing child

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:
Funded hours for all the children carried forward to the new term need to be added.

Where required a 30hr eligibility code can be updated or added to a child record and a code validity check completed.

To update a child’s record click on the child’s name, which is shown in orange text.

Synergy FIS Provider Portal

Organisation: [] Open New Tab ?
Provider: []

HOME **FUNDING** IMAGES
Summary Estimates Actuals Adjustments Eligibility Checker

Provider Headcount Records

Previous | Page: 1 2 3 ... 17 | Next [83 Results]

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

Previous | Page: 1 2 3 ... 17 | Next [83 Results]

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Add Child Send Claim

Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
Unchanged	(31-Jan-2014)	0.00	0.00	0.00		18-Sep-2017 - 09-Feb-2018 Grace Period: 31-Mar-2018
Unchanged	(27-Nov-2013)	0.00	0.00	0.00		21-Sep-2017 - 14-Dec-2017 Grace Period: 31-Mar-2018
Unchanged	(27-Nov-2013)	0.00	0.00	0.00		27-Apr-2017 - 18-Dec-2017 Grace Period: 31-Mar-2018

NOTE:
The first screen displayed is the child summary screen.

NOTE:
This may not be the current 30hr data. This information will be refreshed in step 9.

Summary Child Details Parent / Carer Details Funding Details

Term Start Date	07-Jan-2019	Universal Funding	
Term End Date	28-Apr-2019	Funded Hours Per Week	15.00
No of weeks attended	13.00	Funded Hours for Term	195.00
Nominated for DAF	No	Funding Amount @ Provider Rate	£760.50
30H Eligibility Start Date	22-Oct-2018	Child Weightings	£0.00
30H Eligibility End Date	11-Apr-2019	Universal Funding Amount	£760.50
30H Grace Period End Date	31-Aug-2019	Extended Funding	
30H Eligibility last checked	26-Feb-2019 07:27:01	Funded Hours Per Week	15.00
Provider Total Rate	£3.9000	Funded Hours for Term	195.00
		Funding Amount @ Provider Rate	£760.50
		Child Weightings	£0.00
		Extended Funding Amount	£760.50
		Totals	
		Funded Hours Per Week	30.00
		Funded Hours for Term	390.00
		Total Funding (excl. Adj)	£1521.00
		Total amount from Adjustments	£0.00
		Total amount from Pending Adjustments	£0.00
		Total Funding For Term (inc Adj)	£1521.00

Save Cancel *denotes mandatory fields

STEP 4:

Click on the "Child Details" tab.

Check the information displayed and update as required.

Summary Child Details Parent / Carer Details Funding Details

Child Details

Forename* *
Middle Name
Surname* *
DOB*
Proof of DOB
Gender* Male Female
Preferred Surname
Ethnicity*
SEN COP Stage

Address

Address Line 1* *
Address Line 2
Address Line 3
Locality
Town
County
Postcode*

Save

Cancel

*denotes mandatory fields

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.

You must tick consent for EYPP and/or 30H in order to for a check to be completed.

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

Summary 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
Surname
DOB
 NI or NASS Number
Tick to give consent to Eligibility EYPP 30H
Checking for

Partner Details

Forename
Surname
DOB
 NI or NASS Number
Tick to give consent to Eligibility EYPP 30H
Checking for

Save

Cancel

*denotes mandatory fields

STEP 6: (3 & 4 year olds only)

Click on the "Funding Details" tab.

Click on the "Default Term Dates" button if the term dates are not populated.

Enter the number of weeks that the child is attending during this term. Further information on the number of weeks in a term can be found in the term funding pack sent by the FIS Team.

Note: This field will default to the maximum stretch weeks. Please ensure the correct number of weeks is entered.

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. If you don't then the child cannot access more than 10 hours per week funding.

3 & 4 year olds only: Select Yes or No for the "Nominated for DAF" field (this is Disability Access Fund). Please send the relevant paperwork as per the DAF guidance in the claim information pack.

Select "Stretching Entitlement" if the child is going to be stretching their funding for this term.

The screenshot shows the 'Funding Details' form with the following fields and values:

- Start Date*:** 07-Jan-2019
- End Date*:** 28-Apr-2019
- Weeks Attended in Term*:** 13.00
- Present during Census:**
- Attends Two Days or More:**
- Nominated for DAF*:** Yes No
- Stretching Entitlement:**
- Universal Funded Hours per Week:**
 - Universal Hours*:** 15.00
- Extended Funded Hours per Week:**
 - Extended Hours*:** 5.00
 - 30H Eligibility Code:** 30 Hours Free Childcare
- Eligible for 30H:**
- Total Funded Hours per Week:**
 - Total Funded:** 30.00
- 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*:** 20.00
- Maximum Values Allowed:**
 - Number of Weeks: 13.00
 - Universal Weekly Hours: 15.00
 - Universal Termly Hours: 195.00
 - Universal Yearly Hours: 570.00
 - Extended Weekly Hours: 15.00
 - Extended Termly Hours: 195.00
 - Extended Yearly Hours: 570.00

Buttons: Save, Cancel. *denotes mandatory fields.

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 9: EXTENDED HOURS

If the child is receiving extended hours at you setting please include these in the "Extended Hours" field and add the 30H Eligibility Code.

Click on the "30 Hours Free Childcare" button to refresh the 30hr information to confirm continued eligibility for funding.

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.

STEP 10:

Click "Save" to save the record. The child record will then show in the headcount list.

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.