

Early Years Provider Portal User Guide

This Portal is for the Nursery Education funding process. It will enable providers to submit their Headcount information and the Local Authority to share information securely.

To access the Provider Portal use the following link: <u>www.stockport.gov.uk/eyfunding</u> Or alternatively, log on to the Stockport Council Website and search for Early Years <u>We recommend that you save this page in your favourites for future use</u>

1(a) **Signing in** - Once you are at the Provider Portal you will see the **Signing in** page below. Please use the User name and password that you have been provided with.

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1(b) You will then need to change your password, **SEE BELOW**, simply complete the new password and current password boxes and click **Confirm**. We will not know what you have changed your password to, but we can reset it if you forget or need to change your password at a later date.

Synergy FIS P	rovider Portal	User Settings Logout
НОМЕ		
ocation: <u>HOME</u> > USER SETTING	ş	
	Your authority has requested that you change your password. Please change your details below in order to continue.	
User Settings		
Please change you	r details below:	
New Password:		
Confirm New		
Enter your current	password for security reasons:	
Current Password:		

1(c) You will need to sign in with this username and password every time you want to access the Portal.

2(a) Funding - Once you arrive at the welcome screen you will need to click FUNDING.

Logged in as: <u>User Settings</u> <u>Logout</u>

2(b) The first page that will open is the **Provider Headcount Records** page. Here you will find funding details for the current and previous **Terms**. Funding is divided into two different **Funding Types - 3 and 4 Year Old Funding and 2 year Old Funding**.

Terms and Funding Types that can be amended will have an **Open** option next to them.

Those showing **View** option are groups that are now closed and you can only view the records.

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/			
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HOME FORMS FUNDING			
Summary Estimates Actuals Adjustments		Please select a provid	er from the drop down below 🛛
Location: HOME > FUNDING > ACTUALS		Manage Providers: Test Nurs	ery (PVI) (Private Nursery (PVI))
Provider Headcount Records			
	Previous Page: 1	Next [5 Results]	\mathbf{V}
Actuals	Year	Term	Funding Type
Open Z	2015-16 Academic Year	Summer	3 & 4 Year Old
Open	2015-16 Academic Year	Summer	2 Year Old
View	2015-16 Academic Year	Spring	3 & 4 Year Old
View	2015-16 Academic Year	Spring	2 Year Old
View	2015-16 Academic Year	Autumn	3 & 4 Year Old

When the **FUNDING** tab is open you will see a list of other options beneath. **SEE BELOW** Summary Estimates Actuals Adjustments

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3(a) Summary - The first option available is the FUNDING tab. Select the Term and Funding Type you wish to Open.

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Sum	ion: <u>HOME</u> > <u>FUNDING</u> > ACTUALS	0	Manage Providers: Te	est Nursery (PVI) (Private Nursery (PVI))
Sum ocation Pro	nmary Estimates Actuals Adjustmen ion: <u>HOME</u> > <u>FUNDING</u> > ACTUALS	rds	Manage Providers: Te	est Nursery (PVI) (Private Nursery (PVI)) 👤
sum ocation P ro	ion: HOME > FUNDING > ACTUALS	rds	Manage Providers: Te	est Nursery (PVI) (Private Nursery (PVI)) 🛓
Sum ocation Pro	Minary Estimates Acquire Adjustmen	r ds Previous Page	Manage Providers: Te	est Nursery (PVI) (Private Nursery (PVI)) 🛓
Sum ocation Pro	Mmary Esumates Acquite Adjustmen ion: <u>HOME</u> > FUNDING > ACTUALS ovider Headcount Recon	rds Previous Page Year	Manage Providers: Te : 1 Next [5 Results]	est Nursery (PVI) (Private Nursery (PVI)) 🛓 Funding Type
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Sum ocation Pro	Annary Esumates Acquate Adjustmen ion: HOME > FUNDING > ACTUALS ovider Headcount Recor Actuals Open Open	rds Previous Page Year 2015-16 Academic Year 2015-16 Academic Year	Manage Providers: Te : 1 Next [5 Results] Summer Summer	Est Nursery (PVI) (Private Nursery (PVI)) Funding Type 3 & 4 Year Old 2 Year Old
Pro	Annary Esumates Acquate Adjustmen ion: HOME > FUNDING > ACTUALS ovider Headcount Recor Actuals Open Open View	rds Previous Page Year 2015-16 Academic Year 2015-16 Academic Year 2015-16 Academic Year	Manage Providers: Te : 1 Next [5 Results] Term Summer Summer Spring	Est Nursery (PVI) (Private Nursery (PVI)) Funding Type 3 & 4 Year Old 2 Year Old 3 & 4 Year Old 3 & 4 Year Old
Pro	Actuals Open Open View View	rds Previous Page Year 2015-16 Academic Year 2015-16 Academic Year 2015-16 Academic Year 2015-16 Academic Year	Manage Providers: Te 1 Next [5 Results] Summer Summer Spring Spring	Est Nursery (PVI) (Private Nursery (PVI)) Funding Type 3 & 4 Year Old 2 Year Old 3 & 4 Year Old 2 Year Old 2 Year Old

3(b) Below is an example of what you will see in the summary screen.

(Please note: The names of terms may not correspond from one image to the next in this guide as the images have been taken from a training module. On the live system you will see that they remain consistent through the different tabs.)

Synergy FIS Provider Portal		<u>User Settings</u> Log
DME FORMS FUNDING		Please select a provider from the drop down below 🔀
tion: <u>HOME</u> > <u>FUNDING</u> > SUMMARY		Manage Providers: Hai-Man Nursery (Day Nursery)
ımmary: 2013 Summer - 2013		
Actuals		
Term Length (Weeks)	12.66666	
Funded Hrs (Term)	0.00	
▷ Total Rate Per Hour	£3.65000	
Sub Total (Hrs x Total Rate)	£0.00	
Term Funding Amount		
Term Funding Amount	£0.00	
Interim Amount Paid (before Adj)	£0.00	
Interim Amount Paid (before Adj)	£0.00 £0.00 £0.00	
Term Funding Anount Paid (before Adj)	£0.00 £0.00 £0.00 £0.00	
Term Funding Aniount Paid (before Adj)	£0.00 £0.00 £0.00 £0.00	
Term Funding Anount Paid (before Adj) Term Funding Amount Balance Adjustments Paid Actual Amount Paid (Inc. Adj) Total Weekly Non-Funded Hours	£0.00 £0.00 £0.00 £0.00 £0.00	
Term Funding Antoant Term Funding Amount Balance Adjustments Paid Actual Amount Paid (Inc. Adj) Total Weekly Non-Funded Hours Paid	£0.00 £0.00 £0.00 £0.00 £0.00 0.00 No	

From the Summery you can see details of your actual payments and whether payment has been made.

The **Paid Date** refers to the date the Early Years Team submit the request for payment to the Finance Department and not the date the funds are in your account

4(a) Estimates - Childminder only

<u>Please note that only Childminders need to complete Estimates.</u> If you are NOT a Childminder please move to <u>Section 5.</u>

Childminders **MUST** submit an estimate of the number of **hours** they expect funded children to attend. It is from this estimate that the payment you receive at the start of the following term is calculated from. If no estimate is submitted you will **NOT** be paid.

To enter an estimate you need to select **ESTIMATE** from the top menu. This will again give you the option of choosing a **Term** and **Funding Type (2 year olds or 3 / 4 year olds)**. Once selected you will be able to enter and submit your Estimates. **SEE BELOW.**

HOME FORMS FUNDING			Please select a provider from the drop down below 🛛
ocation: HOME > FUNDING > ES	Adjustments STIMATES		Manage Providers: Eyteam Setting (Day Nursery)
Submit Estimate: Aca	ndemic Year 2015-16 Summ	er - 2 Year Old	
stimate Number of Funde	d Hours for this Term		
Estimate Number of Funde Nease enter a number, the Send Claim	ed Hours for this Term		
Estimate Number of Funde Nease enter a number, the Send Claim	ed Hours for this Term		

Enter the number of hours you expect to be funded for in the selected Term. This needs to be the total amount of hours for all children expected combined.

4(b) You can change the number of hours you have estimated, even if you have already clicked **Send Claim**, up until the submission deadline date (you will always be notified of the deadline date). Simply enter the new number and click **Send Claim** again to resubmit.

The **ACTUALS** tab will show you a list of funded children attending your setting. When you select the **ACTUALS** tab you will go back to the **Provider Headcount Records** page. Again you will see a list of **Terms** and **Funding Types** to choose from - select **Open**

Synergy FIS Prov	vider Portal				Logged in as: <u>User Settings</u> <u>Logout</u>
HOME FORMS	ents		Please s	elect a provider from	n the drop down below 🛛
Location: <u>HOME</u> > <u>FUNDING</u> > ACTUALS			Mar	age Providers:	(Day Nursery) 🗸
Provider Headcount Rec	ords	Previous Page: 1	Next [2 Results]		
Actuals		Year	Term		Funding Type
Open	2016 / 2017		Summer	Bury E	E C 3 And 4 Year Old Funding
<u>Open</u>	2016 / 2017		Summer	Bury E	E C 2 Year Old Funding
		Previous Page: 1	Next [2 Results]		

After you have selected the appropriate **Term** and **Funding Type**, you will see a list of children automatically brought forward from the previous term.

(Please note that only children eligible will be automatically carried forward into subsequent terms. For example, if a child has turned 5 years old and therefore is out of the date range for next term, they will be automatically removed by the system. Additionally if this is your first term of entering details no previous terms will appear)

5(b) This is where you will be able to **add**, **delete** and **edit** a child's details.

Add Child S	: 201 end Clai	m	atumn - Andre	:w 3 & 4			
		Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
Request Delete	Edit	Unchanged	Daveyson, Dave	16-Feb-2012	225.00		30-Mar-2016
Request Delete	Edit	Unchanged	Paulerson, Paul	01-Dec-2012	180.00		
Request Delete	Edit	Unchanged	Petterson, Petula	03-Apr-2012	150.00		30-Mar-2016

You will then need to review the list of children and update their details accordingly for the current term.

6 (a) Adding Children - In order to add a new child you would simply click the Add Child button and a blank form will be shown for you to complete - please note that when the new blank form opens there are 4 separate tabs, you **MUST** click on and complete the first 3 tabs. **SEE BELOW**.

HOME FORMS FUNDING		Please	select a provider from the drop down below en
Summary Estimates Actuals Adjus	tments	TRUCK	
Location: HOME > FUNDING > CHILD	DETAILS	M	anage Providersi Eyteam Setting (Day Nursery) 🗸
Child Details Runding Details Par	ent / Carer Details Notes		
Child Details			
Forename*		Address Line 1*	
Middle Name		Address Line 2	
Sumame*		Address Line 3	
DOB*		Locality	
Proof of DOB		Town	
Gender*	Male Female	County	
Preferred Surname		Postc ode ^x	
Ethnicity	<ur><unknown></unknown></ur>		
SEN COP Stage	<unk nown=""></unk>		
Save Cancel *	denotes mandatory fields		
© 2016 Tribal Education Ltd		Synergy FIS Pr	ovider Portal - Part of the Synergy FIS Suite T * I # A L

On the **Child Details** tab - you will need to provide all of the child's details and full address. Please note that the DOB field **MUST** be entered in the following format <u>**30-May-2016**</u>. This can be done manually or by using the little calendar tool that opens when you click on this field.

On the **Funding Details** tab - **SEE BELOW** - selecting the **Default Term Dates** tab will add the dates for you. If a child starts mid-way through a term then you will need to enter the correct start date.

6(b) Please tick the Present during Census tick box whenever adding a child.

and the second se	
ME FORMS FUNDING	
mmary Estimates Actuals Adjustments	
ion: <u>HOME</u> > <u>FUNDING</u> > CHILD DETAI	LS
ne: Dave Daveyson DOB: 16-Fe	2012
d Details Funding Details Parent / Ca	arer Details
Funding Details	
Funding Details	\checkmark
Funding Details Present during Census	
Funding Details Present during Census Term Start Date*	01-Sep-2016
Funding Details Present during Census Term Start Date* Term End Date*	01-Sep-2016 31-Dec-2016
Funding Details Present during Census Term Start Date* Term End Date*	01-Sep-2016 31-Dec-2016 Default Term Dates
Funding Details Present during Census Term Start Date* Term End Date* Attends Two Days or More	01-Sep-2016 31-Dec-2016 Default Term Dates
Funding Details Present during Census Term Start Date* Term End Date* Attends Two Days or More Weeks Attended in Term*	01-Sep-2016 31-Dec-2016 Default Term Dates 15.0
Funding Details Present during Census Term Start Date* Term End Date* Attends Two Days or More Weeks Attended in Term* Funded Hours Per Week*	01-Sep-2016 31-Dec-2016 Default Term Dates ✓ 15.0 15.00

You can then enter the weeks and hours of attendance. If you enter anything invalid you will receive an error message highlighting what needs to be changed. Refer to the information previously received on what hours and weeks to claim if submitting a full claim for that Term.

You must also enter a value in the Non-Funded Hours Per Week field.

6(c) On the **Parent/Carer Details** tab - you must complete fully using the information collected on the **Parental Agreement** form in order for the Early Years Team to be able to check if a child is eligible for Early Years Pupil Premium (EYPP).

me: Dave Daveyson DOB: 16-56	-h-2012
hild Details Funding Details Parent / C	arer Details
Parent / Carer Details	
Details are optional but if entere	ed then all fields must be filled in
Forename	
Surname	Smith
DOB	01-Jan-2000
☑ NI or □ NASS Number	NH981237C ×
	1 <u> </u>

When you have entered the details on all 3 tabs, simply press the **Save** button. If anything needs to be corrected you will see an Error Message.

6(d) The final tab is the - **Notes tab** - this tab is **only to be used for entering a 2 Year Old reference number** for a child to be able to access funding

Synergy FIS P	rovider Portal				Logged in as: EYTe User Settings Log
HOME FORMS FUNDING					
Summary Estimates Actuals A	Adjustments			fase select a provider from	the drop down below 🔀
Location: HOME > FUNDING > CH	ILD DETAILS			Manage Providers: Eyte	am Setting (Day Nursery)
Child Details Funding Details	Parent / Carer Details Notes				
			Notes History		
Add a new note:					
Add a new note:	\sim	~			
		\sim			

7(a) **Deleting a Child** - There will be times when you will need to delete a child from your headcount. This will generally only be needed at the start of a term and a child has been brought forward by the Local Authority but is no longer attending. If you do need to delete a child from your records you will need to click **Request Delete**.

Add Child	Send Clai	m					
		Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
lequest Delete	Edit	Unchanged	Daveyson, Dave	16-Feb-2012	225.00		30-Mar-2016
equest Delete	Edit	Unchanged	Paulerson, Paul	01-Dec-2012	180.00		
equest Delete	Edit	Unchanged	Petterson, Petula	03-Apr-2012	150.00		30-Mar-2016

Once you have selected **Request Delete** you get the following message:

Request	: Delete
Are you sure you want to request the deletion of ch Delete requests are automatically submitted but ca	hild: Daveyson, Dave from this headcount record? n be cancelled.
Yes	No

Selecting Yes changes the option for that child to Cancel Delete.

Cancel Delete Edit Delete Pending, Submitted

This delete will stay pending until you submit your final claim.

7 (b) If **you** wish to delete a child you have just added i.e. you have entered all the child's details into a blank form rather than them being carried forward, then next to that child you will see that the options look slightly different. Rather than seeing **Request Delete** you will just see **Delete**.

Submit Act	tual: 2016/3	2017 Summer - 38	44yo Funding -	Ar		
Add Child	Cond Claim					
Add Child	Send Claim					
	Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
					1	
elete Edit	Add Pending	Koothrappali, Rajesh	29-Mar-2012	180.00		
<u>elete</u> Edit	Add Pending Add Pending	Koothrappali, Rajesh Wolowitz, Howard	29-Mar-2012 21-Mar-2012	180.00 180.00		-
<u>elete</u> Edit elete Edit	Add Pending Add Pending	Koothrappali, Rajesh Wolowitz, Howard	29-Mar-2012 21-Mar-2012	180.00 180.00		
Delete Edit	Add Pending Add Pending Send Claim	Koothrappali, Rajesh Wolowitz, Howard	29-Mar-2012 21-Mar-2012	180.00 180.00		

This is because the child's details have not been submitted so have not yet been imported to the system by the Early Years Team. If you delete a child at this stage they will not have been seen by the Early Years Team. If you select **Delete** you will receive the following notification:

Confirm Delete	
Are you sure you want to delete child: Wolowitz, Howard from t	his headcount record?
Yes No	

If you select **Yes** then the child will immediately be removed from your list.

8. Editing Details - If you do spot incorrect information against a child's record then you can use the Edit option in order to correct those details.

9. After you have made all changes required and you are happy that it is an accurate reflection, you need to go back to the **ACTUALS** PAGE.

To do this simply select **ACTUALS** tab and you will be taken back to the **Provider Headcount Records** page where you will then be able to select another age group (i.e. 2 Year Old Funding if previously been updating 3 & 4 Year Old funding), if appropriate and update those records as outlined above.

10. Submitting your Headcount form

You must submit your Headcount information by the specified date. To do this go to the **Provider Headcount Records** page in the **ACTUALS tab**, select the appropriate **Term** and **Funding Types** that are due to be submitted, check that the names and hours are correct.

The accuracy of this is extremely important and if the submitted records are incorrect this will affect your payments.

Once you are happy to proceed simply click the **Send Claim** button and it will be sent through to the Early Years Team. **SEE BELOW**

HOME FORMS	FUNI	DING					
Summary Estimat	- es Actu	als Adjustments			Please select a prov	vider from the drop do	own below 🛛
ocation: <u>HOME</u> > <u>F</u>	UNDING	> ACTUALS			Manage Provide	rs:	(Day Nursery)
		Subr	lission successiui				
Submit Actu Add Child	i <mark>al: 2</mark> Send (016/2017 Autumn -	Andrew 3 & 4	ł]	
Submit Actu Add Child	Send (O16/2017 Autumn - Claim	Andrew 3 & 4	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
Add Child	Send (Claim Status Edit Pending, Submitted	Andrew 3 & 4 Child Name Daveyson, Dave	Date of Birth 16-Feb-2012	Funded Hours for Term 225.00	Child Weightings	Last ECS Date 30-Mar-2016
Add Child	Send (Edit Edit	Claim Status Edit Pending, Submitted Delete Pending, Submitted	Andrew 3 & 4 Child Name Daveyson, Dave Paulerson, Paul	Date of Birth 16-Feb-2012 01-Dec-2012	Funded Hours for Term 225.00 180.00	Child Weightings	Last ECS Date 30-Mar-2016

Send Claim Button

You should then receive the message **Submission successful.** If your submission is not successful you will need to check your records then resubmit. If you cannot submit then please contact the Early Years Team by emailing <u>EYPortal@stockport.gov.uk</u>

When the deadline has been reached and we close the **ACTUALS** tab down to process payment, you will see that rather than being able to **Open** actuals for a term you will only be able to **View**.