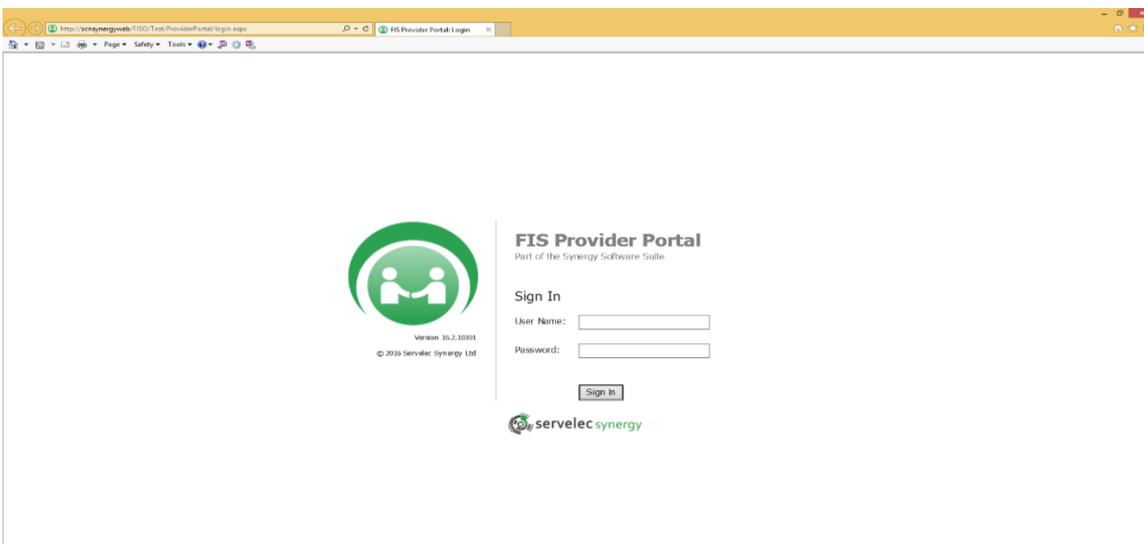


Early Years Provider Portal User Guide

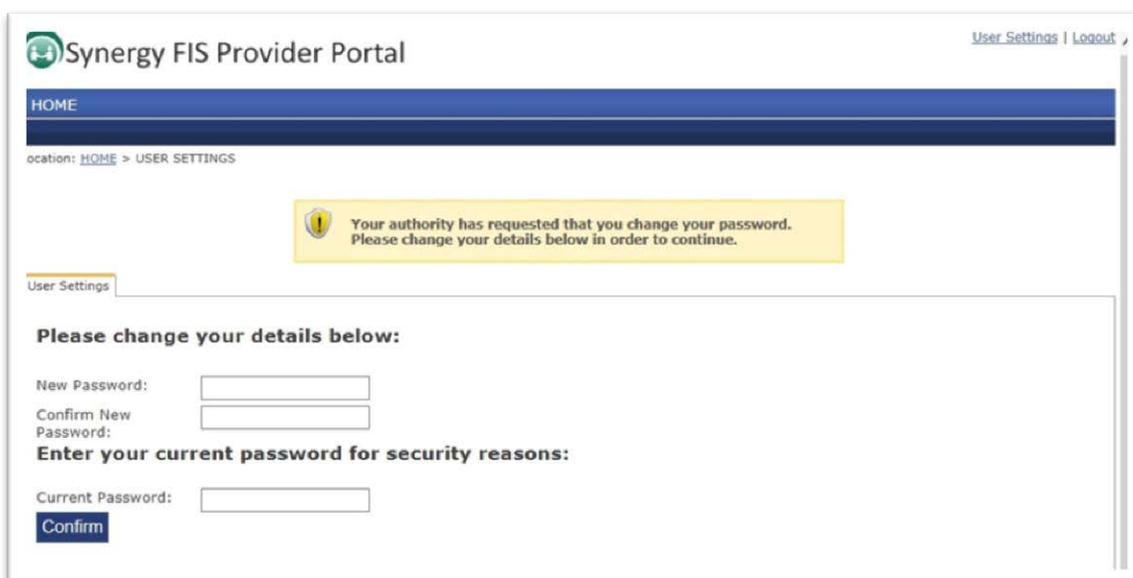
This Portal is for the Nursery Education funding process. It will enable providers to submit their Headcount information and the Local Authority to share information securely.

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

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.



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.



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

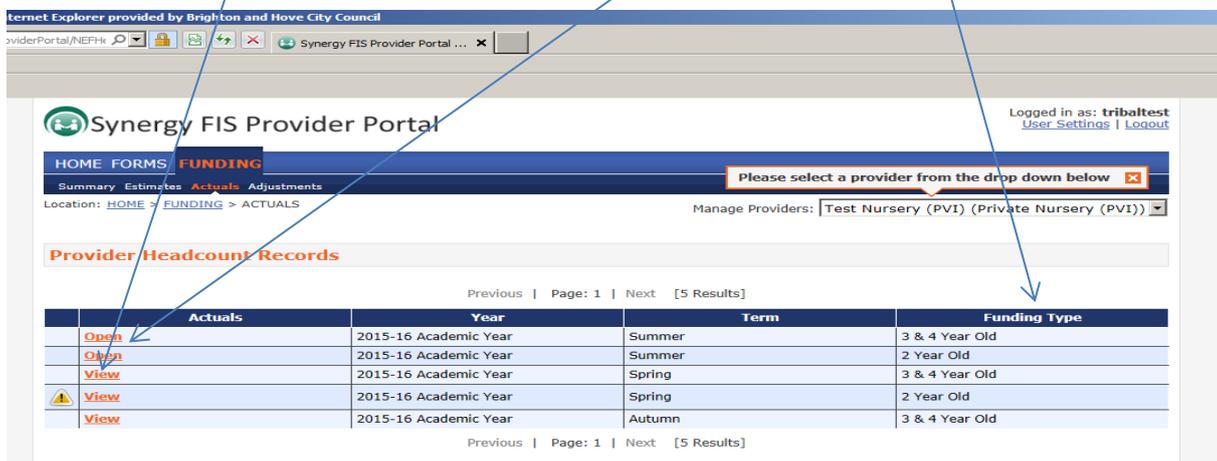
2(a) **Funding** - Once you arrive at the welcome screen you will need to click **FUNDING**.



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.

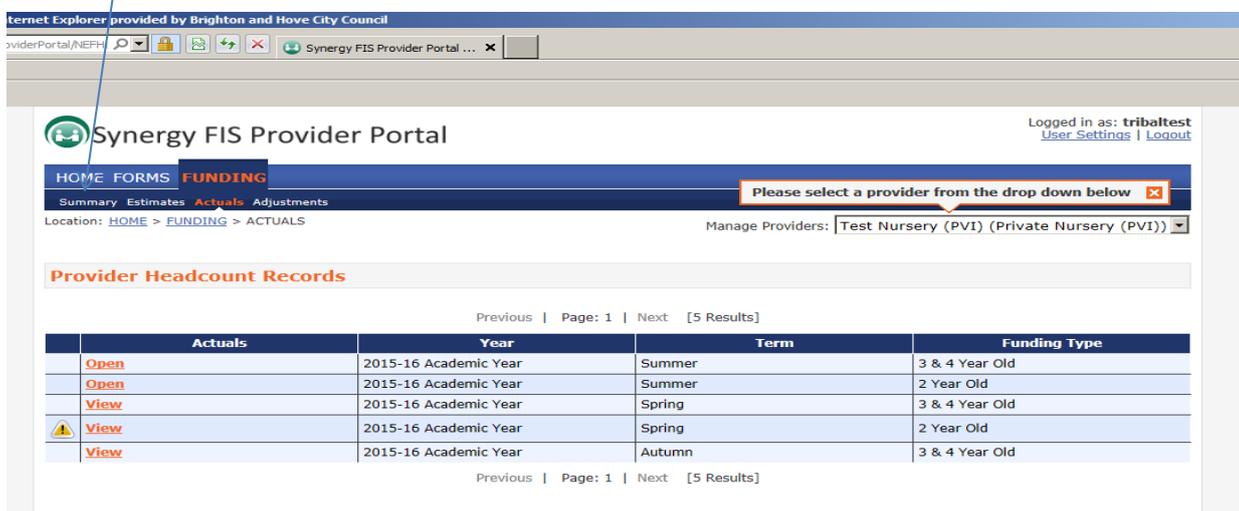
Those showing **View** option are groups that are now closed and you can only view the records.



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

- Summary
- Estimates
- Actuals
- Adjustments

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



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.)

HOME FORMS FUNDING
Summary Actuals Adjustments
Please select a provider from the drop down below
Location: HOME > FUNDING > SUMMARY
Manage Providers: Hai-Man Nursery (Day Nursery)

Summary: 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	£0.00
Interim Amount Paid (before Adj)	£0.00
Term Funding Amount Balance	£0.00
Adjustments Paid	£0.00
Actual Amount Paid (Inc. Adj)	£0.00
Total Weekly Non-Funded Hours	0.00
Paid	No
Paid Date	

From the Summary 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

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

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
Summary Estimates Actuals Adjustments
Please select a provider from the drop down below
Location: HOME > FUNDING > ESTIMATES
Manage Providers: Eyteam Setting (Day Nursery)

Submit Estimate: Academic Year 2015-16 Summer - 2 Year Old

Estimate Number of Funded Hours for this Term
Please enter a number, then 'Send Claim'

Send Claim

© 2016 Tribal Education Ltd
Synergy FIS Provider Portal - Part of the Synergy FIS Suite

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**

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.

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.**

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 **30-May-2016**. 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.

Synergy FIS Provider Portal

HOME FORMS **FUNDING**

Summary Estimates **Actuals** Adjustments

Location: HOME > FUNDING > CHILD DETAILS

Name: Dave Daveyson DOB: 16-Feb-2012

Child Details Funding Details Parent / Carer Details

Funding Details

Present during Census

Term Start Date* 01-Sep-2016

Term End Date* 31-Dec-2016

Default Term Dates

Attends Two Days or More

Weeks Attended in Term* 15.0

Funded Hours Per Week* 15.00

Non-Funded Hours Per Week* 0.00

Save Cancel *denotes mandatory fields

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).

HOME FORMS **FUNDING**

Summary Estimates **Actuals** Adjustments

Location: HOME > FUNDING > CHILD DETAILS

Name: Dave Daveyson DOB: 16-Feb-2012

Child Details Funding Details Parent / Carer Details

Parent / Carer Details

Details are optional but if entered then all fields must be filled in.

Forename John

Surname Smith

DOB 01-Jan-2000

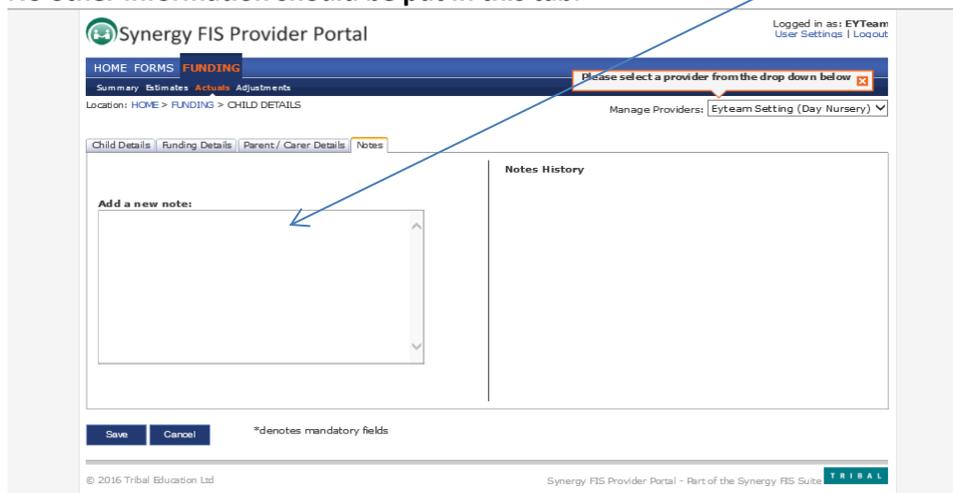
NI or NASS Number NH981237C x

Save Cancel *denotes mandatory fields

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

No other information should be put in this tab.



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**.

Submit Actual: 2016/2017 Autumn - Andrew 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

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



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

		Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
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 Actual: 2016/2017 Summer - 38-4yo Funding - Ar

		Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
Delete	Edit	Add Pending	Koothrappali, Rajesh	29-Mar-2012	180.00		
Delete	Edit	Add Pending	Wolowitz, Howard	21-Mar-2012	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:



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**

Submit Actual: 2016/2017 Autumn - Andrew 3 & 4

	Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS Date
Delete	Edit Pending, Submitted	Daveyson, Dave	16-Feb-2012	225.00		30-Mar-2016
Cancel Delete	Delete Pending, Submitted	Paulerson, Paul	01-Dec-2012	180.00		
Request Delete	Unchanged	Petterson, Petula	03-Apr-2012	150.00		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 EYPortal@stockport.gov.uk

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**.