

Rotherham Early Education Funding

Provider Guide Notes

In order to ensure that the Synergy Portal functions effectively it is important that you access via one of the following Web Browsers (*a 'Web Browser' is a software application for retrieving, presenting and accessing information resources on the World Wide Web*).

Internet Explorer version 8 or Google Chrome or Firefox

Need to check which browser and version you are using? You can check this by visiting www.whatbrowser.org from the computer you are using. Please also check that your '**computer**' and '**browser**' **language settings** are set to **English (UK)**. This will ensure that the Portal operates correctly.

Access the Portal via the following link:

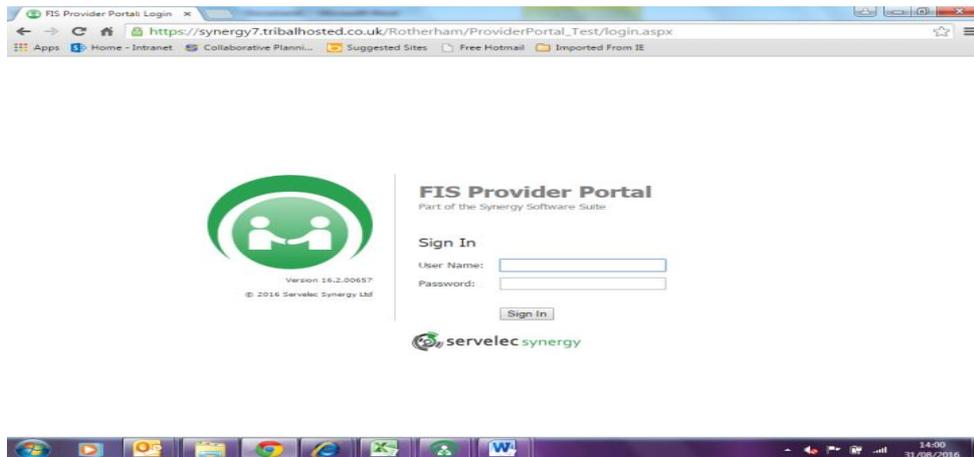
<https://live.cloud.servelec-synergy.com/Rotherham/Synergy/Providers>

Updated on April 2019

Pam Hawkins pam.hawkins@rotherham.gov.uk Tel: 01709 822694

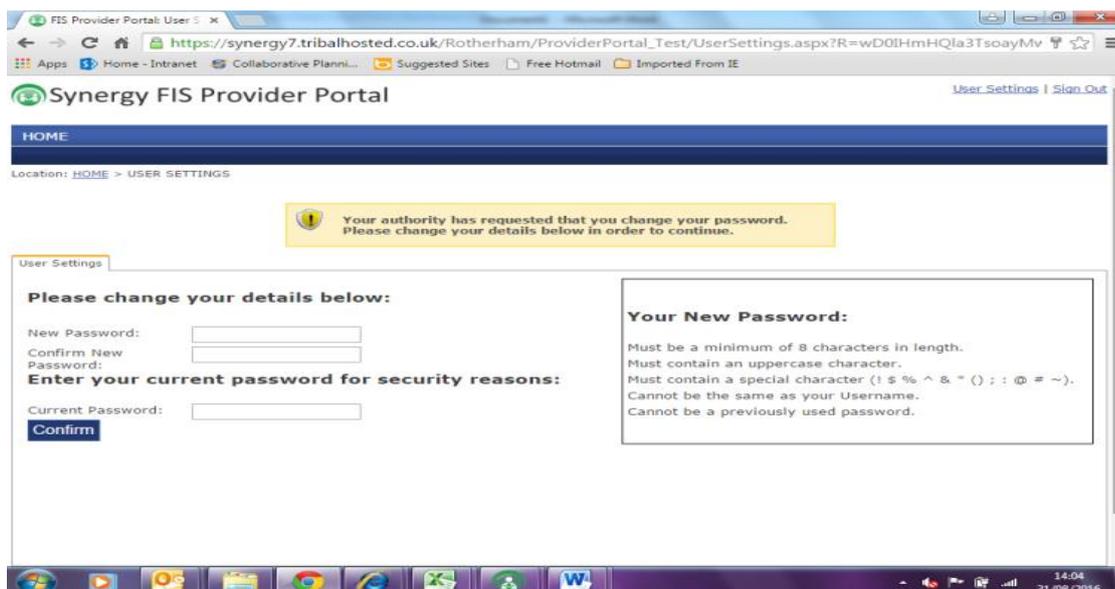
Jeannette Smith Jeannette.smith@rotherham.gov.uk Tel: 01709 822691

THE LOGIN SCREEN

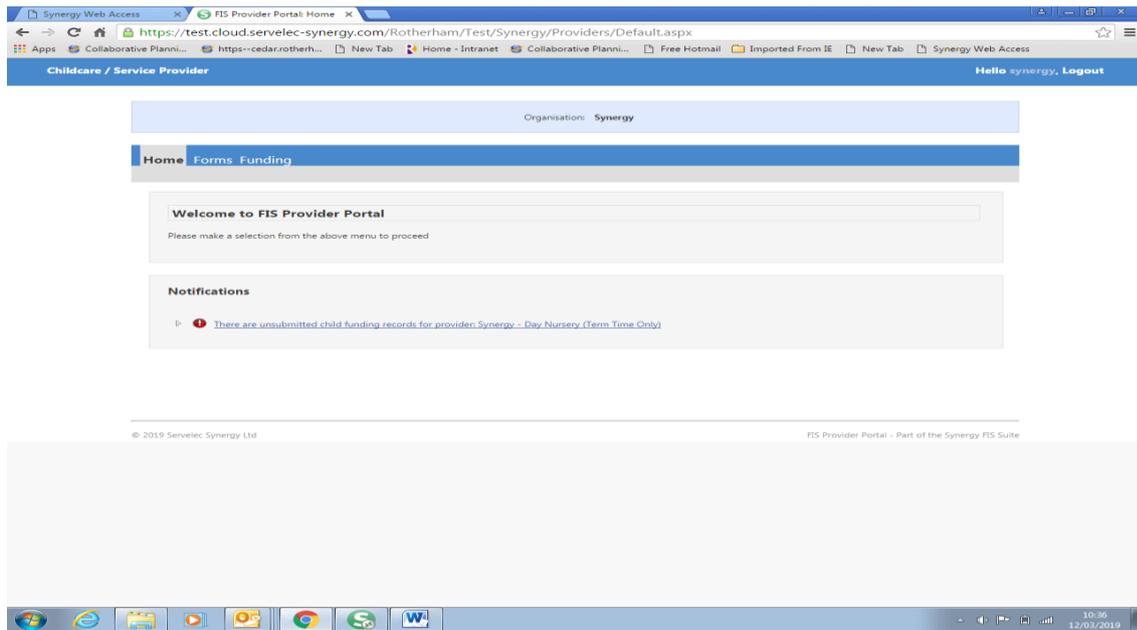


Enter the User Name and Password provided by Rotherham Early Years (the password will need to be changed at the first log in). For Data Protection, it is essential you keep the password in a secure place. You can change the password at any time by clicking User Settings. If you forget your password or lock yourself of the account, please contact Early Years for help. The Password criteria is:

- Must be a minimum of 8 characters in length.
- Must contain an uppercase character.
- Must contain a special character (! \$ % ^ & * () ; : @ # ~).
- Cannot be the same as your Username.
- Cannot be a previously used password

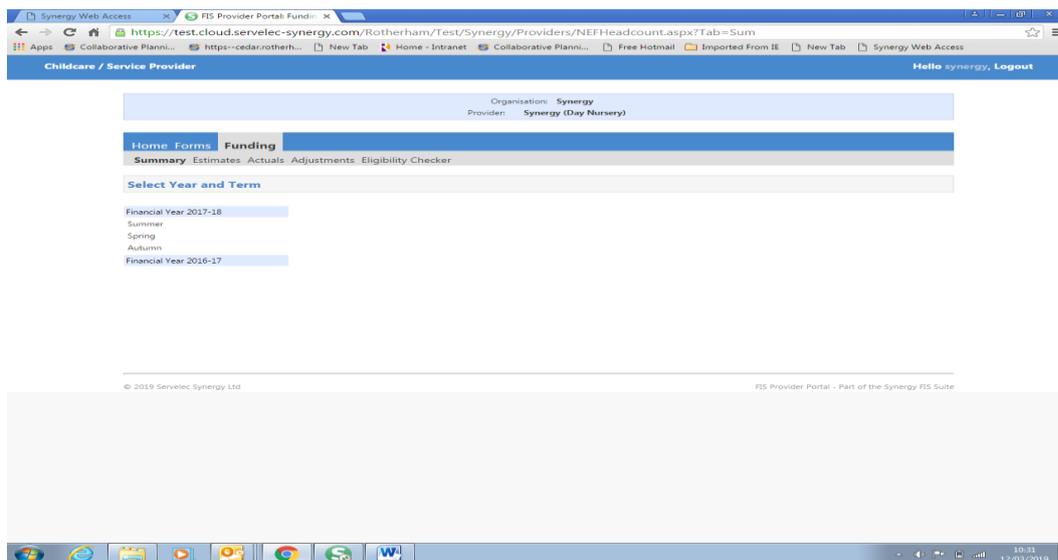


THE HOME SCREEN



Click **FUNDING**

This is the funding Summary page



At ESTIMATE – click the relevant term and age range i.e. 2019/20 Summer and 3 & 4 Year Olds. Click Estimate

A box will appear for you to send the pre-term estimate figure in for example, if I have 10 children each accessing 15 hours per week in the Summer term (13 weeks)

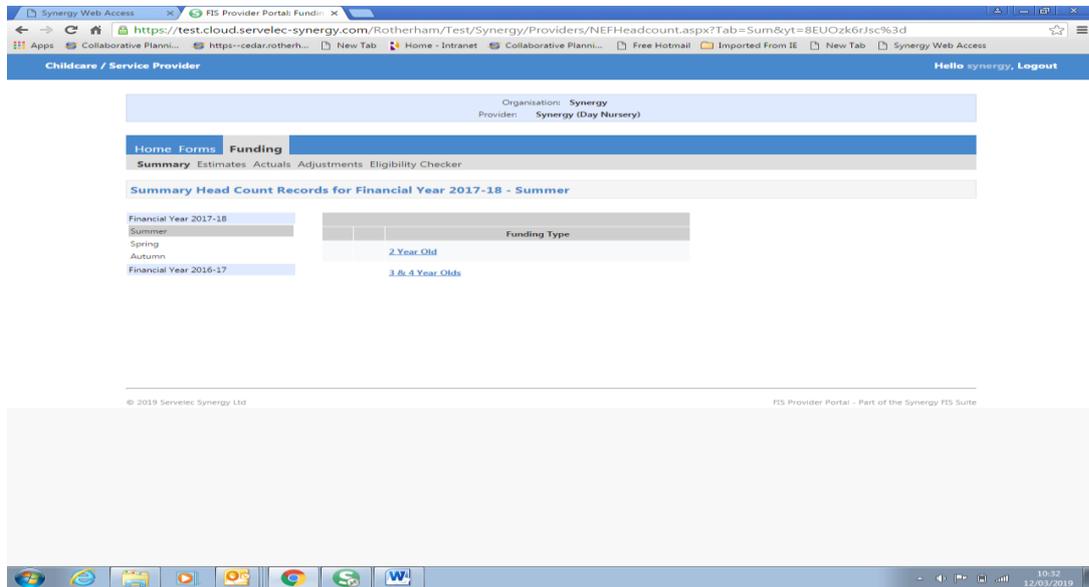
$$10 \times 15 \times 13 = 1950 \text{ hours for the estimate}$$

CLICK SUBMIT and wait for the Submission Successful box to appear

AT HEADCOUNT

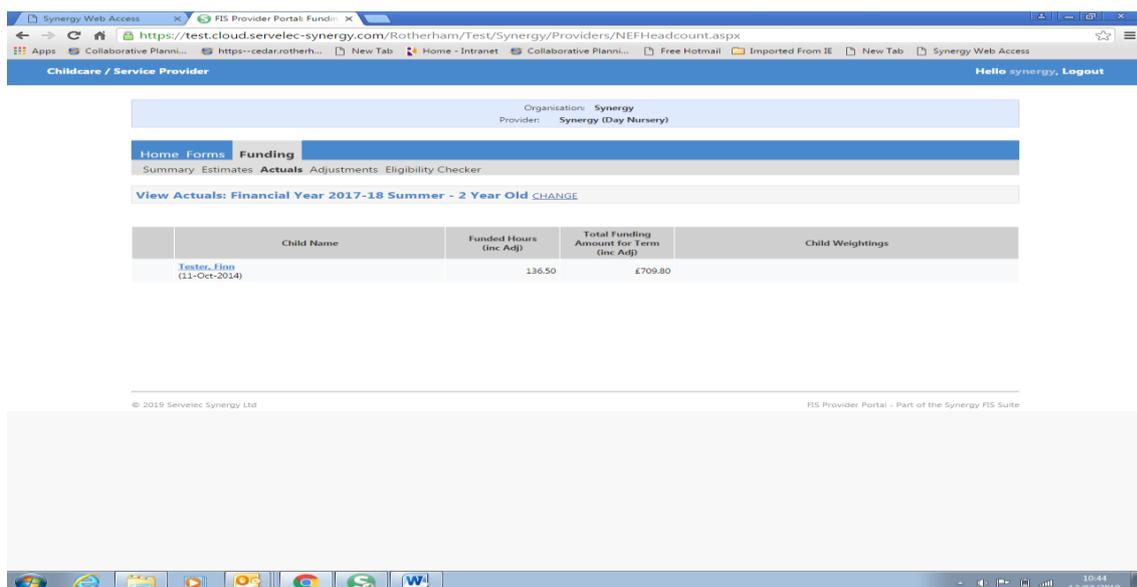
Click FUNDING, **Actuals**

The Online EEF window will open at Headcount week and close at the deadline date and again at Adjustment week and close at the adjustment closing deadline (dates are as detailed in the EE contract agreement at page 21).



Click to select Term and funding Type you wish to edit to view a list of children currently attached to your setting.

TO EDIT/CHECK ALL EXISTING CHILDREN (2 AND 3&4 Year EEF) – click on Child's Name



You will need to review each child details so that the information can be submitted for the current term

Click the Child Details tab to review and edit

Please ensure you add Ethnicity, SEN code and tick Proof of DOB. Edit any information for a child that has changed i.e. a new address, amendment to a name

The screenshot shows a web browser window with the URL <https://test.cloud.servelec-synergy.com/Rotherham/Test/Synergy/Providers/NEFHeadcountDetailPage.aspx? pup=eElPgBEx1%2bQ%3d&nit=IPtvySjEIDM>. The page header indicates the user is logged in as 'Hello synergy, Logout'. The main content area shows the 'Funding' tab selected, with sub-tabs for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The child's name is 'Finn Tester' with a DOB of '11-Oct-2014'. The 'Funding Details' form includes the following fields and options:

Funding Details	
Start Date*	01-Apr-2017
End Date*	31-Aug-2017
Weeks Attended in Term*	13.00
Present during Census	<input checked="" type="checkbox"/>
Attends Two Days or More	<input checked="" type="checkbox"/>
Stretching Entitlement	<input type="checkbox"/>

Attendance Days	
Attends Monday	<input type="radio"/> Yes <input type="radio"/> No
Attends Tuesday	<input type="radio"/> Yes <input type="radio"/> No
Attends Wednesday	<input type="radio"/> Yes <input type="radio"/> No
Attends Thursday	<input type="radio"/> Yes <input type="radio"/> No
Attends Friday	<input type="radio"/> Yes <input type="radio"/> No
Attends Saturday	<input type="radio"/> Yes <input type="radio"/> No
Attends Sunday	<input type="radio"/> Yes <input type="radio"/> No

Universal Funded Hours per Week	
Universal Hours*	10.50

Non-Funded Hours per Week	
Non-Funded Hours*	0.00

*denotes mandatory fields

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

Review and edit the Funding Details for each child on the claim.

At Headcount, the **Present during Census** should be ticked. Edit term dates to show the weeks attendance for the child. Tick the Two Days or More box if applicable and always if you are claiming for a child with more than 10 funded hours per week. Enter the Weeks Attended with any odd days shown as 0.2 for each single day, the Funded hours per week for this claim and the number of non-funded hours i.e. a child could be 15 hours funded and 5 hours non-funded, total 20 hours in setting.

Please use **Notes** tab to inform us if a child is also claiming with another provider or changing hours mid-term (i.e. at adjustment) i.e. Date from/to and number of weeks/hours. Click **SAVE**.

To delete - If at headcount, the child has left and there is no claim for this term then **click the Red Cross** next to the child's name request delete will appear and confirm

ADDING 2 YEAR EEF CHILDREN

To Add new children within the 2 year EEF term, Click **Enter EY Voucher**:

The screenshot shows the Synergy FIS Provider Portal interface. A modal window titled "EY Claim" is open, displaying the following text: "Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname." Below this text are three input fields: "Voucher Code*", "Child Date of Birth*", and "Child Surname*". A note below the fields states "*denotes mandatory fields". At the bottom of the modal are "Submit" and "Cancel" buttons. The background shows the portal's navigation menu with "HOME FORMS FUNDING" and "Submit Actual: Financial Year 2" button.

Enter valid Voucher Code (2Year EEF code), child's DOB, child's surname as provided by the parent.

This will retrieve the information held within the system previously entered by Families Information Service (FIS) when checking the eligibility of the family for 2 Year EEF. **Click the Child Details tab to review and edit**

Please ensure you **add Ethnicity, SEN code and tick Proof of DOB**. Edit any information for a child that has changed i.e. spelling on name or a new address

The screenshot shows the "Childcare / Service Provider" section of the Synergy FIS Provider Portal. The "Child Details" tab is selected, showing the following information for a child named Finn Tester (DOB: 11-Oct-2014):

Child Details		Address	
Forename*	Finn	Address Line 1*	Riverside House
Middle Name		Address Line 2	Main Street
Surname*	Tester	Address Line 3	
DOB*	11-Oct-2014	Locality	Rotherham Town Centre
Proof of DOB	<input type="checkbox"/>	Town	Rotherham
Gender*	<input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	County	
Preferred Surname		Postcode*	S60 1AE
Ethnicity*	White - British		
SEN COP Stage	No Special Educational need		

At the bottom of the form is a "Close" button and a note: "*denotes mandatory fields". The footer of the page includes "© 2019 Servelec Synergy Ltd" and "FIS Provider Portal - Part of the Synergy FIS Suite".

Click Funding Details tab to edit.

At Headcount, the **Present during Census** should be ticked. Edit term dates start and end dates for the child. Tick the Two Days or More box if applicable and always if you are claiming for a child with more than 10 funded hours per week. Enter the Weeks Attended, the Funded hours per week for the claim and the number of non-funded hours i.e. a child could be 15 hours funded and 5 hours non-funded. Attendance Days is an optional field.

The screenshot shows the 'Funding Details' tab for a child named Finn Tester. The form contains the following information:

Funding Details	
Start Date*	01-Apr-2017
End Date*	31-Aug-2017
Weeks Attended in Term*	13.00
Present during Census	<input checked="" type="checkbox"/>
Attends Two Days or More	<input checked="" type="checkbox"/>
Stretching Entitlement	<input type="checkbox"/>
Universal Funded Hours per Week	10.50
Non-Funded Hours per Week	0.00

Attendance Days:

Day	Yes	No
Attends Monday	<input checked="" type="radio"/>	<input type="radio"/>
Attends Tuesday	<input type="radio"/>	<input checked="" type="radio"/>
Attends Wednesday	<input checked="" type="radio"/>	<input type="radio"/>
Attends Thursday	<input type="radio"/>	<input checked="" type="radio"/>
Attends Friday	<input checked="" type="radio"/>	<input type="radio"/>
Attends Saturday	<input type="radio"/>	<input checked="" type="radio"/>
Attends Sunday	<input type="radio"/>	<input checked="" type="radio"/>

Additional text: *denotes mandatory fields. 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.

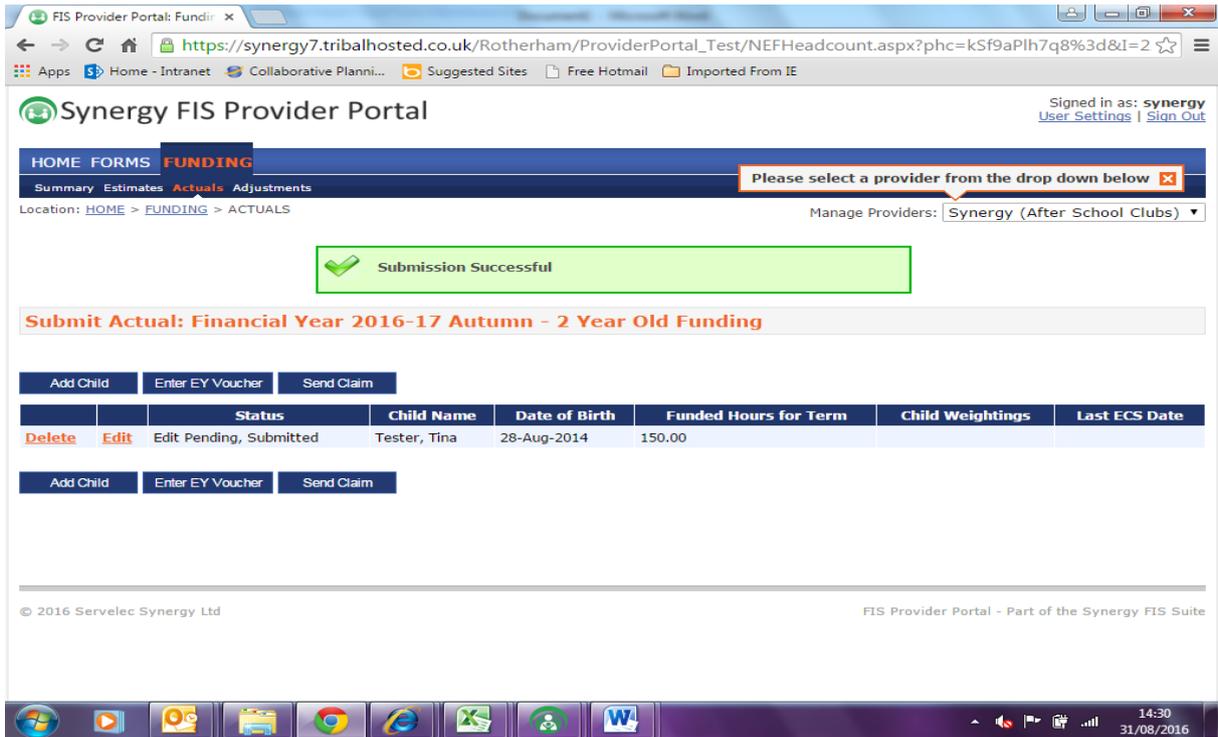
Use **Notes** tab to inform us if a child also claims through another provider or is changing hours mid-term (i.e. at adjustment) i.e. Date from/to and number of weeks/hours.

Once complete click **SAVE**

IMPORTANT –

Once all children are added and existing children have been reviewed, click **Send Claim** and the information will then be transferred to Early Years for validation and payment.

Early Years cannot see child information until it is submitted.

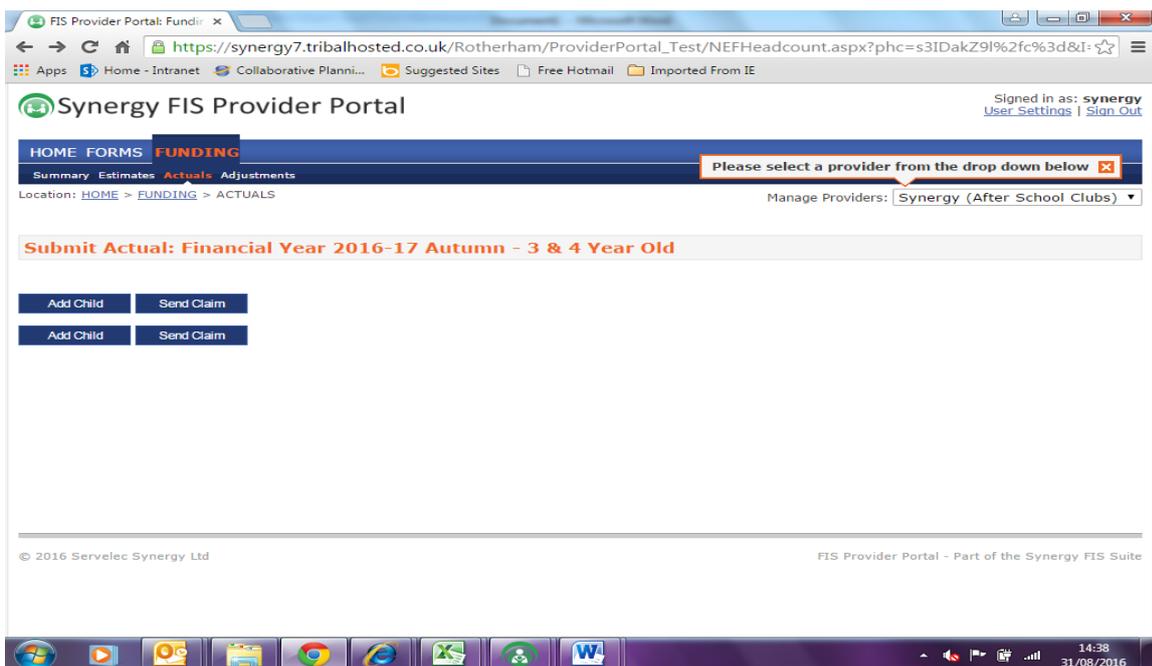


Edit Pending next to the child shows you have amended the record and Early Years are yet to review the record.

Your screen should state: Submission successful

ADDING 3&4 YEAR EEF CHILDREN (incl 30Hour children)

To enter details of a NEW 3 and 4 year old, click **FUNDING** click **Actuals**, click **add child**



There is no pre populated information for new 3&4 year olds. On **Child Details** Enter Name, DOB, Proof of DOB (tick), Gender, Preferred Surname (if different) Ethnicity, SEN COP stage and all address fields, including a valid post code.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with 'HOME', 'FORMS', and 'FUNDING' tabs. Below this, a message box says 'Please select a provider from the drop down below'. The main content area is titled 'Child Details' and contains several input fields: Forename*, Middle Name, Surname*, DOB*, Proof of DOB (checkbox), Gender* (Male/Female radio buttons), Preferred Surname, Ethnicity, SEN COP Stage, Address Line 1*, Address Line 2, Address Line 3, Locality, Town, County, and Postcode*. There are 'Save' and 'Cancel' buttons at the bottom of the form. The footer of the page includes copyright information for 2016 Servelec Synergy Ltd and the text 'FIS Provider Portal - Part of the Synergy FIS Suite'.

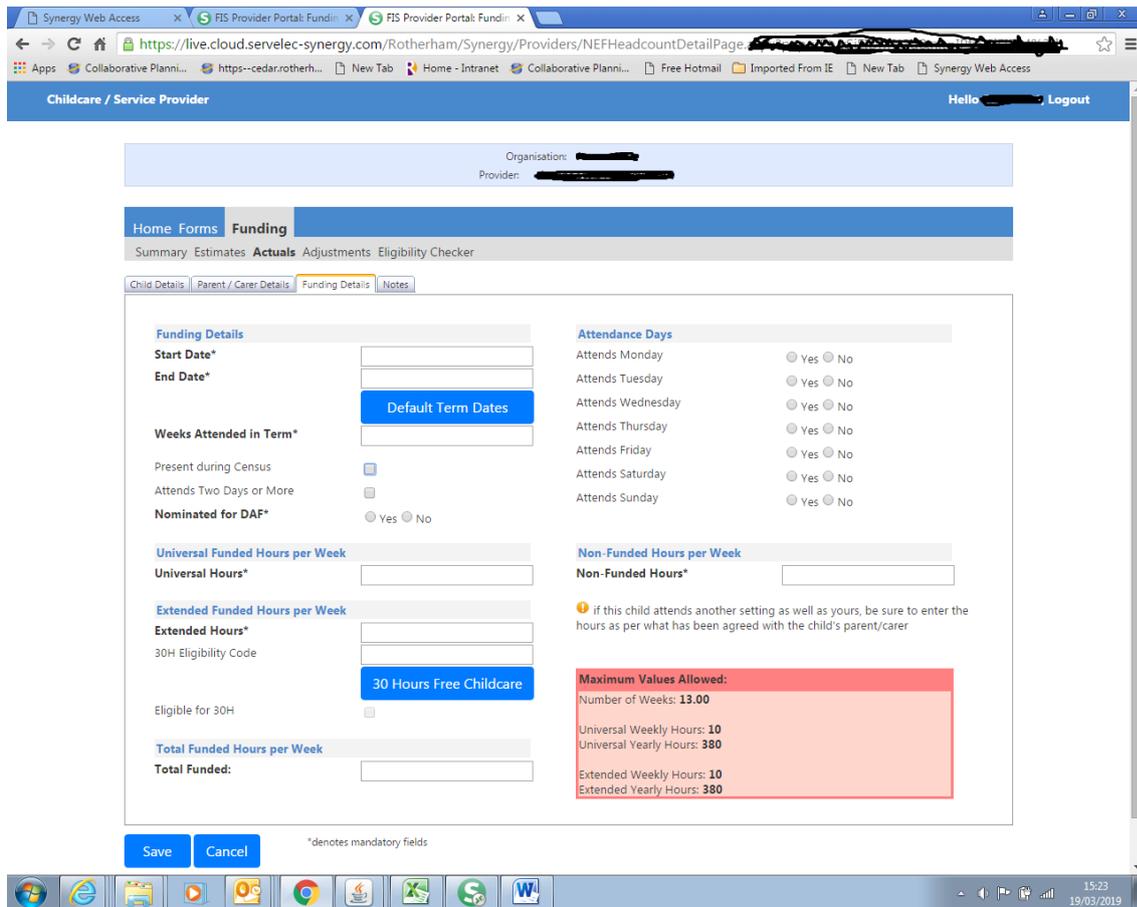
Click **Parent / Carer Details** Tab if you wish to make a claim for **Early Years Pupil Premium (EYPP)** for the child or are making a 30H claim. Complete parent carer information including National Insurance number of NASS and tick to state you have permission to share for EYPP or 30H as appropriate.

Click **Funding Details** tab

At Headcount, you should tick the Present during Census box. Edit term dates to show start and end dates for the child. Tick the Two Days or More box if applicable and always if claiming for a child with more than 10 funded hours per week. Enter the Weeks Attended, the Funded hours per week for this claim and the number of non-funded hours i.e. a child could be 15 hours funded and 5 hours non-funded for total 20 hours attended.

30H children

The system will carry out a live check with ECS when the correct Child Date of Birth, the parent's National Insurance number and the 11 digit DERN code issued by HMRC Childcare Choices are entered. Once you have all 3 pieces of information entered press the blue bar '30 Hours Free Childcare' and the system will confirm if the code is valid with a green tick. Red Cross if not valid.



Use **Notes** tab to inform us if a child is also claiming with another provider or changing hours mid-term (i.e. at adjustment) i.e. Date from/to and number of weeks/hours.

Once complete click **SAVE and Add Child** for any additional children. Once all children are added and existing children have been reviewed, click **Send Claim**

All children attached to the setting are listed at FUNDING Actuals.

Children with EYPP will have this showing under 'Child Weighting'.

For 30H children, the code End Dates and Grace Periods are shown on the screen. Any children in Grace Period will have a warning triangle next to their name. Remind parents of these children to re-confirm their codes on HMRC Childcare Choices site.

The screenshot shows a web browser window with the URL: https://test.cloud.servelec-synergy.com/Rotherham/Test/Synergy/Providers/NEFHeadcount.aspx?phc=8Qkn1r6FetA%3d. The page title is "Childcare / Service Provider" and it says "Hello synergy, Logout". The user is logged in as "Synergy (Day Nursery)". The navigation menu includes "Home", "Forms", and "Funding". Under "Funding", there are links for "Summary", "Estimates", "Actuals", "Adjustments", and "Eligibility Checker". The "Actuals" link is selected. Below the navigation, there is a link: "View Actuals: Financial Year 2017-18 Autumn - 3 & 4 Year Olds CHANGE". A table displays the following data:

Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
Ant, Adam (31-Aug-2014)	225.00	225.00	£1800.00		01-Aug-2017 - 13-Oct-2017 Grace Period: 31-Dec-2017
Sample, Andy (31-Aug-2014)	225.00	225.00	£1800.00		01-Aug-2017 - 13-Oct-2017 Grace Period: 31-Dec-2017

At the bottom of the page, there is a copyright notice: "© 2019 Servelec Synergy Ltd" and "FIS Provider Portal - Part of the Synergy FIS Suite". The Windows taskbar at the bottom shows the time as 15:30 on 19/03/2019.

SENDING A NIL RETURN AT HEADCOUNT

If at Headcount, you have no Early Education children for this term, please open the link and Log in and click **FUNDING Actuals**, select the term and age range of children, check if there are any children attached to the setting carry forward from last term that require deleting, if so remove and SAVE.

STATING NO CHANGES AT ADJUSTMENT INCLUDING THOSE WITH NO HEADCOUNT CHILDREN

If at Adjustment there are no changes to the statement made at Headcount, please open the link and Log in and select FUNDING Actuals and click the Age group within the relevant term and **Send Claim** then Sign Out the system.

TO ADVISE CHANGES AT ADJUSTMENT

Log onto the portal, Go to **FUNDING Actuals**, select the Term and age group and Open:

- if adding a new 2Year Old do this via Enter Voucher Code (see above)
- if adding a new 3 Year Old do this via Add Child (see above)
- if a child has left mid-term please amend change the number of weeks and the end date of the term (do not delete)
- If a child hasn't attended this term at all please delete
- If a child has increased or reduced the number of hours per week, changed address etc. then please amend.
- To calculate an increase or decrease in hours apply the following example No of weeks x hours for first rate plus No of weeks x hours for

second rate and divide by total weeks. i.e. 7wk x 6hr + 7 wk x 9hr divide by 14wk = 7.5hr x 14wk and add a note to advise the date of change.

- Add Notes to any children sharing EEF delivery with more than one provider, stretching delivery or anything relevant to the claim

SAVE any changes made to a child record and **SEND CLAIM**

FOR ALL YEAR ROUND (STRETCHED) CHILDREN

The stretched model button can be enabled by the Early Years team to widen the options within a Provider's Portal so they can show stretched delivery. Providers can have some Term Time and some Stretched children within any term. Children taking up stretched provision can utilise more funded hours in the Summer and can balance this out with a reduction in hours in the Autumn and Spring. The total delivery within a financial year (April to March) should be 570 hours for basic entitlement. NB Any children moving into F2 in September should not be given additional hours in the Summer prior to school entry.

Typically this works out at 51 weeks (52 less bank holidays) x 11 universal hours per week and 11 extended hours per week if applicable. Tick the Stretched box within the child record to allow access to additional weeks.

If you need any help making a claim for a different stretch model then contact Early Years

If the claim is over the allowance, Early Years will contact you at Headcount to let you know how many hours of the 570 hours remain.

You should **Save** all changes and additions and **Submit** once your records are complete. You will then see **Submission Successful** appear.

IMPORTANT NOTE

If you have a Red Circle with white Apostrophe showing on the screen this could mean you have unsubmitted records. You will have made amendments to the child records that may not have been sent through to Early Years. Please SEND claim as soon as you complete any changes.

If you experience any problems accessing your account or need any help please contact Early Years and Childcare Services on 01709 822549.