



BEDFORD
BOROUGH COUNCIL



Bedford Borough Provider Portal

User Guide for Synergy

1 January 2025

Version 11

Servelec
Together for Digital Care

Version 23.3.1

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Bedford Borough Provider Portal: User guide

1. When can a child access their funding?

9 months or Child's Birthday	When they can get their hours from
1 September to 31 December	Term starting on or after 1 January
1 January to 31 March	Term starting on or after 1 April
1 April to 31 August	Term starting on or after 1 Sept

2. Where and how to access the Provider Portal

Bedford Borough has a new website, which means there is a change to the location of the Provider Portal

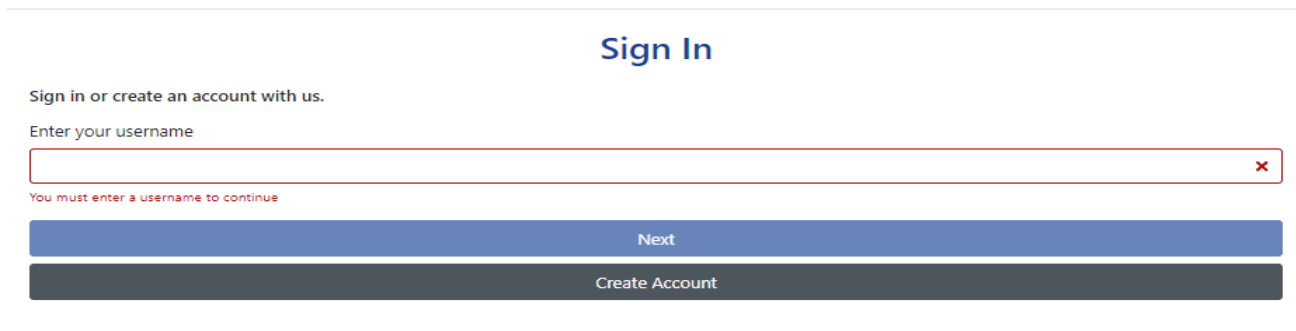
Please note: Synergy works better if using Chrome rather than Explorer to log in.

Go to the Bedford Borough website (www.bedford.gov.uk). Click on 'Schools, Education and Childcare' in the Main Menu. Under the heading Early Years and Childcare, click 'Nursery Education Funding'. The link is at the top of the page in purple: 'Log in to Synergy provider portal'.

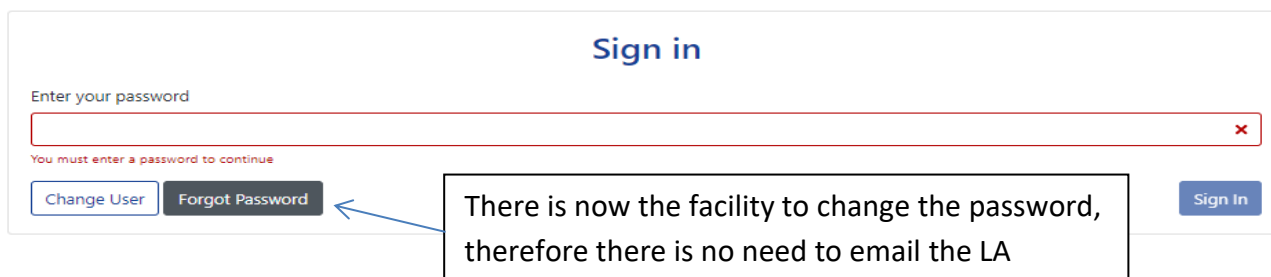
Please note that if the above link changes in the future, settings will notified.

3. Provider Portal – Logging in and out

Enter the given Username and click 'Next':



The following page will then be presented for you to enter your password:



There is now the facility to change the password, therefore there is no need to email the LA

Follow the instructions on the screen to change the password. Once the password has been changed, the home screen will be accessible.

Once you are logged in, you will see the following screen:

The screenshot shows the FIS Provider Portal home page. At the top, there is a navigation bar with 'Home', 'Forms', and 'Funding' tabs. Below the navigation bar, there is a 'Welcome to FIS Provider Portal' section with a message: 'Please make a selection from the above menu to proceed'. Below that, there is a 'Historical Notifications' section with the text: 'These records were edited but never claimed.' and a link: 'Click here to view these items'.

Click on the 'funding' tab at the top to see the following screen. There are two security questions; **both have the pre-set answer of 'Bedford', select the three characters asked for.**

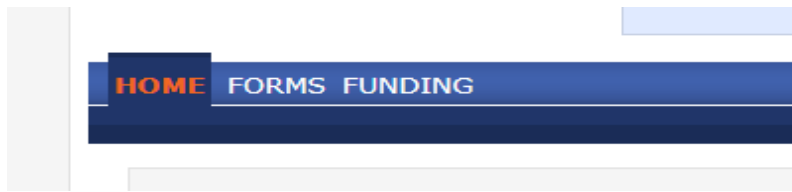
Both answers will need to be changed to something memorable. Highlight one question at a time and change the answer from **Bedford** to your new answer, pressing 'Save' when completed.

The screenshot shows the 'Authentication Questions' page. At the top, there are two tabs: 'Account Security' and 'Authentication Questions'. Below the tabs, there is a heading: 'Please change your authentication questions below'. Below the heading, there is a message: 'If an asterisk is displayed in front of an authentication question then the question has not yet been assigned a personal answer.' Below the message, there is a list of two questions: '* Favourite Place (Provider)' and '* Mothers Maiden Name (Provider)'. Below the list, there is a yellow warning box: 'One or more of your authentication questions is still set to the default answer. Please update these to a personal answer to allow continuation to the requested screen.' Below the warning box, there are three input fields: 'Old Answer:', 'New Answer:', and 'Confirm New Answer:'. At the bottom right, there is a 'Save' button.

From then on, when logging in, 3 random letters of the answer to either one of these questions is required.

The screenshot shows the 'Authentication Questions' page after saving. At the top, there are two tabs: 'Account Security' and 'Authentication Questions'. Below the tabs, there is a heading: 'Please change your authentication questions below'. Below the heading, there is a message: 'If an asterisk is displayed in front of an authentication question then the question has not yet been assigned a personal answer.' Below the message, there is a list of two questions: 'Favourite Place (Provider)' and 'Mothers Maiden Name (Provider)'. Below the list, there is a green success box: 'New answer successfully saved.'

4. Home Page



There will be 3 tabs: Home, Forms and Funding as shown above.

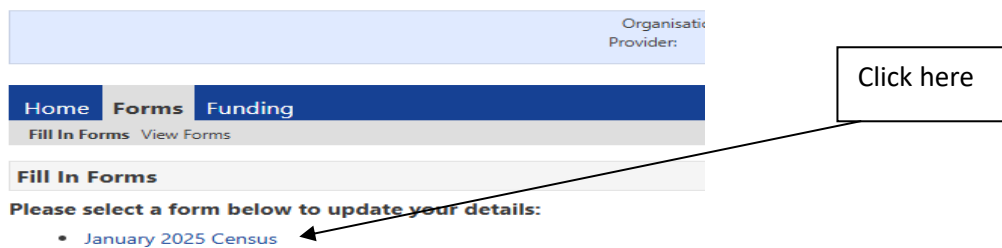
'Home' is the home screen: any notifications regarding your headcount claims will appear, such as 'there are un-submitted claims'. You will need to resolve all warning notifications, for example, submit your claim before the current headcount period closes.

'Forms' is where any data collection forms are listed, such as the annual Census questions available each Spring Term. Availability and deadlines will be given via email. Previous forms will also be accessible.

'Funding' contains headcount information.

5. Forms Tab

Click on the FORMS tab



Complete ALL questions on the relevant form.

If completing the annual Census return, on the opening times section, please use ':' in the times given, i.e. '7:30' otherwise the information will appear with a red dashed line around it. The red line indicates this is not the accepted format and information will be denied.

Once ALL questions have been answered, please click the "Submit Form" button and a green tick will appear, example below:



In 'View Forms' tab, forms will appear on the list with the date and time with "Pending" against it. Information will then be reviewed and if it is accepted "Authorised" will appear against it (example given below).

- [Data Collection \(02/07/2020 15:45:43 - Authorised\)](#)
- [Data Collection \(16/06/2020 10:09:17 - Authorised\)](#)

If the information is not complete or questions are not answered correctly, the forms will not be accepted and “Denied” will appear against it (example given below). If this happens, the form will need to be completed again, answering all the questions.

- [Census Jan 2018 \(25/01/2018 18:19:03 - Denied\)](#)

6. Funding Tab

To view the funding information, click on the ‘Funding’ tab at the top of the screen.

The screenshot shows the 'Funding' tab selected in a blue header bar. Below it is a sub-header bar with options: 'Summary', 'Estimates', 'Actuals' (highlighted in bold), 'Adjustments', and 'Eligibility Checker'. A 'Select Year and Term' section follows, with '2018 to 2019' selected. Under this, three terms are listed: 'Summer' with a red 'no entry' icon and a submission period of 03-Apr-2018 to 21-Jul-2018; 'Spring' with a green pencil icon and a submission period of 19-Dec-2018 to 01-Feb-2019; and 'Autumn' with a green pencil icon and a submission period of 29-Aug-2018 to 31-Dec-2018. The '2017/18' term is also visible below.

Red symbol: Terms that are finished – payments have been processed.

Green symbol: Current term; terms that can be worked on

Under the Funding heading, there is a second tool bar with subheadings for Summary, Estimates, Actuals, Adjustments, Eligibility Checker.

Summary – View funding for the term at a glance, including Rate per Hour, Interim Amounts, and Adjustments

Estimates – submit your Estimate hours that you expect to claim in the new term.

Actuals – Complete the Headcount Claim

Adjustments – Complete to send in an adjustment to your headcount claim for the term

Eligibility Checker – Validate 30-hour eligibility codes

To work on the correct term, choose the relevant term and funding type.

Note: For Estimates, Actuals and Adjustments, the submission dates will be shown and if the Headcount is open, you will see a green icon and the Funding Type will have a pencil icon next to it as below. If there is a red ‘no entry’ icon, this means the Headcount is closed and can only be viewed.

The “Office use only” columns will show when the headcount information is ready to process and has been processed by showing a tick in the columns. **Please note** this is when payments are **sent** to the finance department, not when payments are made. Once the tick is in the “processed” column, no further adjustments are allowed.

6.1 Summary:

This is where financial information can be viewed.

For a term that has already been submitted, arrows against certain sections will be visible; these will show a breakdown of figures (EYPP and Social Deprivation) for all eligible children.

In the ‘Estimates’ column, the number of payments still to be paid (monthly payments) and the amount of funding received so far is visible; these are based on Estimates.

In the ‘Actuals’ column, a breakdown of Universal funding, Expanded funding and Extended Funding, the total hours for the term and the difference between estimate and actual payments are visible

If there are any debts from the term before, these are shown in the ‘Adjustments’ tab

2024 to 2025		
Summer		
Autumn		
2023 to 2024		
2022 to 2023		
2021 to 2022		

Funding Type	
	2 Year Olds
	3 And 4 Year Olds
	9+ Months

Home Forms Funding		Funding – 2 year old funded children (disadvantaged families)	
Summary Estimates Actuals Adjustments		Expanded Funding – working family funding	
Summary: 2024 to 2025 Summer - 2 Year Olds CHANGE			
Estimates		Actuals	
Term Length (Weeks)	13.00	Term Length (Weeks) Term Time	13.00
▶ Provider Rate applied	£5.86	▼ Provider Rate applied to child funding	£5.86
Estimate Funding		Base Rate	
Hours Per Week	0.00		£5.86
Term Funding Amount	£0.00	Funding	
Interim %	75.00%	Funded Hours for Term	0.00
Interim Amount Payable	£0.00	Funding Amount @ Provider Rate	£0.00
<hr/>		<hr/>	
Total Interim Amount Paid to Date (before Adj)	£0.00	Funding Amount	£0.00
<hr/>		Expanded Funding	
Interim Amount Payable Balance	£0.00	Funded Hours for Term	0.00
<hr/>		Funding Amount @ Provider Rate	£0.00
		<hr/>	
		Expanded Funding Amount	£0.00
		<hr/>	
		Totals	
Number of Payments Due	4 / 4	Funded Hours for Term	0.00
Next Payment Amount Due (before Adj)	£0.00	Funding Amount @ Provider Rate	£0.00
<hr/>		Child Weightings	£0.00
		<hr/>	
		Term Funding Amount	£0.00
Fully Processed	No	Interim Amount Paid (before Adj)	£0.00
<hr/>		<hr/>	
		Term Funding Amount Balance	£0.00
		Adjustments Paid with Final Payment	£0.00
<hr/>		<hr/>	
		Actual Amount Paid (Inc. Adj)	£0.00
<hr/>		<hr/>	
		Processed	No
		Processed Date	

Please note that the ‘Processed Date’ is the date that payment requests are sent to Finance not paid; refer to the Payment Timetable for the payment dates.

6.2 Estimates:

Each term the provider will need to estimate the number of hours they expect children to attend with them **each week** for the upcoming term. Select the ‘Estimates’ tab to input or amend current estimates. Estimates must be submitted by the deadline on the payments table.

To submit estimates, please do the following:

- Enter the number of weeks in the term for the setting; please note this may already be filled in.
- Input the estimate amount for total funded hours **each week** for all funded children and then select the ‘calculate’ button. This will then calculate the total number of hours for the whole term.

Submit Estimate: 2018 to 2019 Autumn - 3 And 4 Year Olds [CHANGE](#)

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

Please enter both numbers, click 'Calculate', then 'Send Claim'

This is the **total** funded hours for all funded children per week

Once the amount for the term is correct click the 'send claim' button; a green confirmation box will appear on screen to confirm the submission has been successful.



Please note estimates must be submitted for all funded children in all age groups.

Estimates can be adjusted and resent as long as it is **before the estimate deadline date**. Please remember when working out estimates, it is for all the children attending, not just the additional child.

Please note: Settings can see if estimates have been submitted by clicking on the 'Estimates' tab. If estimates have been correctly submitted and accepted, the 'Estimated Hours' box will be populated.

The 'Summary' tab will also show the figures that were submitted; it will show 'Hours Per Week', 'Term Funding Amount' and 'Interim Amount Payable'

6.3 Actuals:

The actuals section is for: deleting children, editing existing children, adding new children and submitting actual headcount information. When using the system for the first time, all data will need to be added.

Home Forms Funding


Summary Estimates **Actuals** Adjustments Eligibility Checker

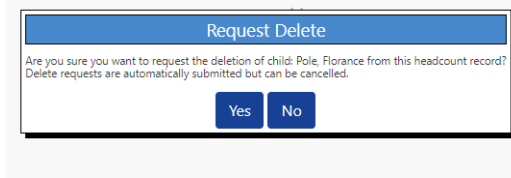
Submit Actual: 2020 to 2021 Autumn - 3 And 4 Year Olds [CHANGE](#)

	Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
✗		Pole, Florance (23-Aug-2017)	195.00	0.00	£863.85	60%SD	
✗		Stick, Frank (28-Aug-2017)	170.00	0.00	£753.10	60%SD	

- Request to delete any child that is no longer at your setting

Select the black cross in the left-hand column to remove a child from the Actual Headcount. A message will pop up asking for confirmation. Click 'yes' to confirm deletion; this will not remove the child automatically.

To undo a Delete Pending request: Before the headcount submission closure date has passed, you can undo a delete pending request on your headcount by clicking the  button. You will be asked to confirm your request; clicking 'yes' will return you to the list of children.



- Existing child records will be shown. Edit all records and ensure they are correct in order to submit a headcount claim. Once edited, 'unsubmitted claim' will appear in the status column.
- If there is a **yellow triangle**, this means that the child is in their **Grace Period** and the **eligibility code should be reconfirmed**. Please remind the parents/carers to do this as soon as possible. Children cannot start at a new setting if they are in their **Grace Period**.

The Grace Period is the time after the Validity End Date and before the Grace Period End Date (31 March, August or December). The Grace Period allows parents/carers to re-enter employment whilst preserving the entitlement to 30 hours. Once the Grace Period has ended, a child will no longer be eligible for extended but will continue to be eligible for the universal 15 hours. During the Grace Period providers will continue to be funded for extended hours.

6.3.1 Summary:

For each child already on the list, there will be a summary under their name. This will show what will be submitted if there are no changes. It will show weightings for each individual child if they received EYPP or Social Deprivation; viewed by clicking on the small arrows, which will show the drop down.

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Frank Stick DOB: 28-Aug-2017

Summary Child Details Parent / Carer Details Funding Details Documents Notes

Term Start Date	01-Sep-2020	Universal Funding
Term End Date	31-Dec-2020	Funded Hours Per Week
No of weeks attended	17.00	10.00
Nominated for DAF	No	Funded Hours for Term
		170.00
Provider Total Rate	£4.12	Funding Amount @ Provider Rate
		£700.40
		Child Weightings
		£52.70
		60% Social Deprivation (€0.31)
		£52.70
		Universal Funding Amount
		£753.10
		Totals
		Funded Hours Per Week
		10.00
		Funded Hours for Term
		170.00
		Total Funding (excl. Adj)
		£753.10
		Total amount from Adjustments
		£0.00
		Total amount from Pending Adjustments
		£0.00
		Total Funding For Term (inc Adj)
		£753.10

Save Cancel

*denotes mandatory fields

6.3.2 Child Details:

Do not press save until all details are complete, otherwise an error message will appear. Remember it will time out after a certain period of inactivity.

Enter the details of the child onto the 'Child Details' tab and check that they are correct. For the DOB to be accepted you need to put the date as 23/04/2017. **Areas with a * must be filled in. Forename and Surname must be as seen as written on the Proof of DOB document (birth certificate/passport/red health book etc.)**

If you have entered a funded two year old using an EY voucher, some of these details will be entered automatically. Ensure that all boxes are checked and completed.

Child Details | Parent / Carer Details | Funding Details | Documents | Notes

Child Details

Forename*

Middle Name

Surname*

DOB*

Proof of DOB

Gender* Male Female

Preferred Surname

Ethnicity*

SEN COP Stage*

Search for an Address

Primary

Postcode*

County

Postcode*

This is a new option, you are able to search an address if you know the number and postcode

*denotes mandatory fields

6.3.3 Parent/Carer Details:

Parent's details will need to be completed; the system will check for EYPP and Working Family Eligibility, as long as the parent's details are filled in and consent has been given. **It is mandatory to supply parent's details, records will not be saved or submitted without this information**

Child Details | Parent / Carer Details | Funding Details | Documents | Notes

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 expanded 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.

Parent / Carer Details

Forename*

Surname*

DOB

Email*

Contact Number*

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP Working Family Eligibility

Partner Details

Forename

Surname

DOB

Email

Contact Number

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP Working Family Eligibility

*denotes mandatory fields

A signed parent declaration form means that a parent/carer has given consent for an eligibility check to be performed for both EYPP and expanded/extended – ensure that both boxes are ticked. There will be an error message and information will not be able to be submitted. Without a signed parent declaration form, children should not be added to synergy.

Ensure that details are transferred to synergy correctly. Please note: incorrect or missing details will mean that if a child is eligible for EYPP, you will not receive funding.

6.3.4 Funding Details:

Fill in funding details for all children. If you are adding a new child, areas marked with * must be filled in.

‘Default Term Dates’ - will show the start and end of the current block; this is for settings that are on a stretched offer therefore:

Change these dates to match term time dates for the setting.

Change these dates if a child starts late or leaves early.

‘Weeks Attended in Term’ – this will show the number of weeks the child is attending. Term time only settings will put the number of weeks for the current term, stretched settings will put the number of weeks that is shown in the red box (see below). **For a late starter or an early leaver, please ensure that the number of weeks attended match the dates. Remember that .2 = one day.**

‘Present during Census box’ - should be ticked

‘Attends two days or more’ – should be ticked if this is the case. If you do not tick this box, it will restrict the number of hours you are able to enter on the system.

‘Nominated for DAF’ - should either be ‘yes’ or ‘no’. **Evidence will need to be sent with the parent declaration form for that child if they are nominated ‘yes’ if it is a new claim. If evidence is not included, DAF will not be paid, and the tick will be removed from the box**

This can now be added to all funded children

‘Stretching entitlement’ - should be ticked if the child is taking a stretched offer of either Universal or Extended Hours or both. If you do not tick this box and the child is on a stretched offer, it will restrict the number of hours and weeks that you are able to enter on the system.

‘Funding Type’ (two year olds only)

Disadvantaged Funding – Funded two year olds with an EY Code

Working Family Funding – Funded two year olds with an 11 Digit Code

Funding Details

Start Date*

End Date*

Weeks Attended in Term*

Present during Census

Attends Two Days or More

Nominated for DAF* Yes No

Funding Type* Disadvantaged Funding
 Working Family Funding

Funded Hours per Week

Hours*

If 'Working Family Funding' is marked, enter the number of hours the child is funded and then enter the 11 Digit Code:

Expanded Funded Hours per Week

Expanded Hours*

Eligibility Code

Eligible for Expanded Hours

Once the eligibility code is entered, check it by pressing, if the cross does not appear in the 'Eligible for Expanded Hours' box, recheck the NI number, DOB of child and Eligibility Code

'Universal Hours' - are the hours that all funded 2, 3 and 4 year olds are entitled to per week (i.e. up to 15 hours). If the parent is claiming their universal hours with your setting, please only enter funded hours in here. Enter '0' if the child is not doing universal hours.

'Extended Hours' - are the hours that families can claim if they are entitled to 30 hours. If the parent is claiming their extended hours only with your setting, please only put the funded hours that the child is attending in this section. Enter '0' if the child is not doing extended hours

If a child is attending for 20 hours at your setting only and they are entitled to the 30 hour offer they will be claiming 15 universal and 5 extended.

If a child is attending 20 hours at your provider and is attending another setting for 10 hours, **the parent will choose which setting they want to claim their universal and their extended hours with.** This will be shown on the Parent Declaration Form. **Please note: it is very important that this is correct as it affects EYPP payments.**

Extended Eligibility code - If the child is eligible for 30 hours, the 'eligibility code' is entered here. **Ensure the '30 Hours Free Childcare' box has been clicked. Please note that this will only check if parent/carer details and consent boxes are filled in.** A tick will appear in the box if the child is eligible.

'Total Funded' - will be automatically filled in.

'Non-Funded Hours' - should be filled in with how many hours the child is attending over and above the Universal or Extended, i.e. this is the hours that parents are being billed for. If they are not attending for any non-funded hours, enter a '0'.

Please note: total number of hours including universal, extended and non-funded hours should total the hours attended according to the parent declaration form.

'Attendance Days' - select 'yes' or 'no' depending on what days the child is attending.

Please note this will need to be repeated for all children.

Please note: this box will change if 'Attends Two Days or More' or 'Stretching Entitlement' has been ticked.

Number of weeks: this is the number of weeks in this block for the current term. This will change if the offer is being stretched based on your closure days

Universal Weekly Hours, Expanded/Extended Weekly Hours: **this is UP TO and will be different for each provider and is based on the stretched offer that each provider set up and the maximum hours allowed for each child, per week.**

Universal Termly Hours, Expanded/Extended Termly Hours: **This is UP TO and will be different for each provider and is based on the stretched offer that each provider set up and the maximum hours allowed for each child, per term.**

30H Eligibility Code	<input type="checkbox"/>	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 17.00 Universal Weekly Hours: 12.83 Universal Termly Hours: 193.18 Universal Yearly Hours: 570 Extended Weekly Hours: 12.83 Extended Termly Hours: 193.18 Extended Yearly Hours: 570
Eligible for 30H	<input type="checkbox"/>		
Total Funded Hours per Week			
Total Funded:	<input type="text" value="11.00"/>		

*denotes mandatory fields

Census Information

NEW:

Expanded Entitlement Weeks

Records the Number of Weeks the Child is expected to stretch their Expanded hours across the Child's eligibility year, in line with the parental declaration form.

Census Information

Funded Entitlement Weeks

Extended Entitlement Weeks

Records the Number of Weeks the Child is expected to stretch their Funded/Extended hours across the Child's eligibility year, in line with the parental declaration form.

Please enter the number of weeks that the child is expected to attend at your setting for the **YEAR** (information should match the parent declaration form for this child)

Term Time Children = 38

Stretched Children = total of stretched weeks for your setting

6.3.5 Documents:

Parent declaration forms are added to this section. The portal will accept PDFs, Photos or Word documents. Documents will need to be saved individually with a file name that will help you recognise which declaration is for which child. DLA proof should also be added here if the child is eligible for DAF.

Summary Child Details Parent / Carer Details Funding Details Documents Notes

Supporting Documents
Please upload any documents which support this term.
Please enter a Description to clarify what the file contains.
Allowed file types are: All file types permitted
Files may not be larger than 5 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel *denotes mandatory fields

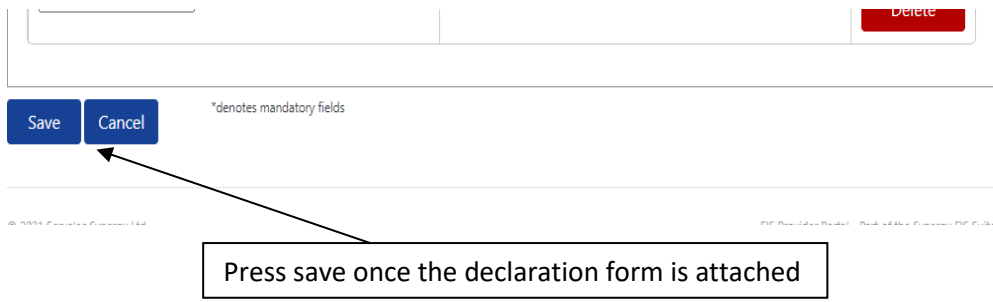
Click here: you will need to find your saved documents

Supporting Documents
Please upload any documents which support this term.
Please enter a Description to clarify what the file contains.
Allowed file types are: All file types permitted
Files may not be larger than 5 MB.

Description*	File Name	Upload a file
Parent Dec	EJ.pdf	Delete
DLA proof	DWP letter for EJ.pdf	Delete

*denotes mandatory fields

Add a description in this box; it will not save without a description

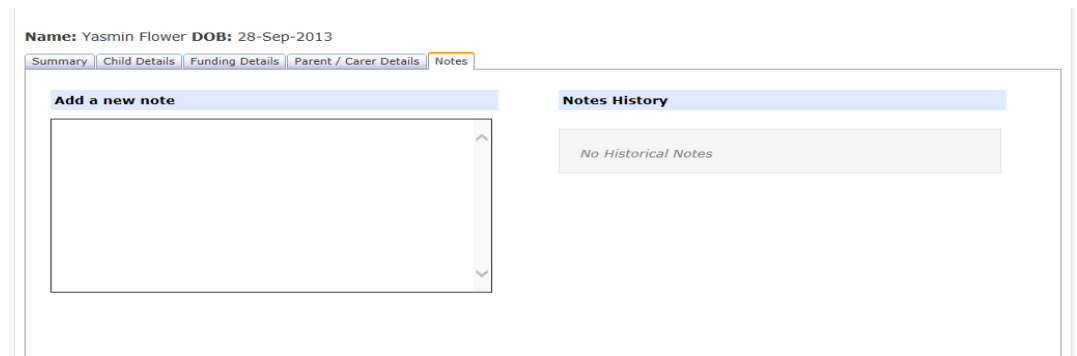


Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
Unsubmitted Claim	Ansari, Kayenaat (27-May-2017)	210.00	0.00	£875.70		

On the summary page, this will show that there is a document attached

6.3.6 Notes:

Please use this to communicate about a particular child. Please feel free to add any additional information regarding the child’s funding submission in this section, for example, tell us if the child is LAC or adopted so we know to add EYPP.



6.3.7 Stretching the offer: (please notify us if you wish to offer stretched provision for parents/carers)

A child can use up to **570 (universal 15 hours a week) or 1140 (universal 15 hours plus extended 15 hours a week)** hours per year. If the setting is offering a stretched offer, it means this amount is stretched for the whole of time the setting is open throughout a year.

To work out how many weeks the setting is open, take off any time no care for children is offered, i.e. bank holidays. Every day closed is the equivalent to .2 of a week.

The child will then be able to attend up to the maximum amount of hours a week. In order to work this out, take the maximum hours they can claim per year and divide it by the weeks that the setting is open.

EXAMPLE:

Setting is open for 50 weeks a year

$570 \div 50 = 11.4$ hours a week (15 universal)

$1140 \div 50 = 22.8$ hours a week (15 Universal + 15 extended)

A child who is attending for 12 hours a week will claim 11.4 hours and pay for .6 hours per week, throughout the year and will attend for 50 weeks

Please note - The stretched offer will only be valid if the child is attending less than 15 hours a week or less than 30 hours a week.

If the child is attending all year and is attending 15 hours (or more) or 30 hours (or more) this is a **term time only offer**.

The nursery may stretch the bill for the parent over the whole year and split this into equal payments for the parent.

EXAMPLE:

Setting is open for 50 weeks a year

A child who is attending for 25 hours a week but is eligible to claim 15 hours

The parent will be billed:

10hrs x 38 weeks plus 25hrs x 12 weeks for the whole year. This total can be split into 12 monthly payments

Please note

- A parent can only claim up to 10 hours a day; if the child is attending for an 11-hour day then the parent will have to pay for an hour.
- The stretched offer must be for a whole year and parents should be aware that they shouldn't sign up for it unless they intend to stay at the setting for three terms (so that they have attended the full amount of weeks that the setting is open).
- If the child moves settings and changes from a stretched offer to a term time only offer, this will have an impact on the hours that are available to them and may result in them having to pay a bill.
- If the child is due to go to school part way through their stretched offer, they should stay on a term time only offer.
- The child should not change their hours throughout the year and are not able to change from a stretched to a term time and back again.

6.3.8 Adding new children to two year olds:

Click the 'Add Child' button on the 'Actuals' tab and fill in details as above.

All areas with marked with '*' must be filled in. **It is very important the name and address of the child is correct at this stage; please do not use shortened names or nicknames. Ensure that the name used is the same as the name seen on written proof of birth (birth certificate, passport, red health book etc)**

When adding a newly Funded Two Year Old (disadvantaged families) to headcount, press the 'Enter EY Voucher' and enter the code in the box:

Submit Actual: 2020 to 2021 Autumn - 2 Year Olds [CHANGE](#)

Add Child	Enter EY Voucher	Send Claim
Add Child	Enter EY Voucher	Send Claim

EY Claim

Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.

Voucher Code*

Child Date of Birth*

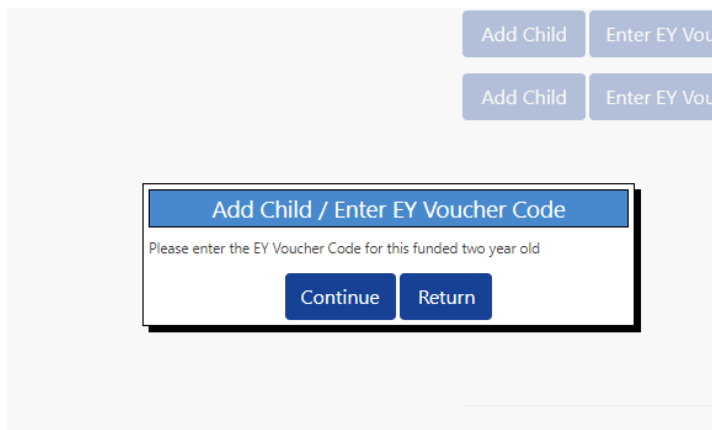
Child Surname*

*denotes mandatory fields

Add Child	Enter EY Voucher	Send Claim
Add Child	Enter EY Voucher	Send Claim

Ensure you complete each of these 3 boxes with the correct information. If this is an eligible code, the child will be automatically added to headcount. If you experience problems getting this information accepted, please contact us (funding@bedford.gov.uk). Do not continue and add the child on without a correct funding code.

If you try and add a two year old by pressing 'add child' another box will appear:



If you are adding a working family code, press 'continue'. If you are adding a funded two year old, press 'return'

Late Starter:

If a child has started later in the term, add them onto Synergy in the usual way (within 5 working days of their start date), ensuring the start date and number of weeks is correct. If Synergy is closed then send an adjustment email and their parent declaration form to us – see Section 9.

Leaver:

If a child has left your setting, please let us know within 5 working days by editing the end date and number of weeks on the child's record and submitting the claim.

7. "It won't save!"

Once all of the details of each child are correct click 'Save'. If there are any errors or omissions, it will clearly show in red; these messages will need to be actioned before saving:

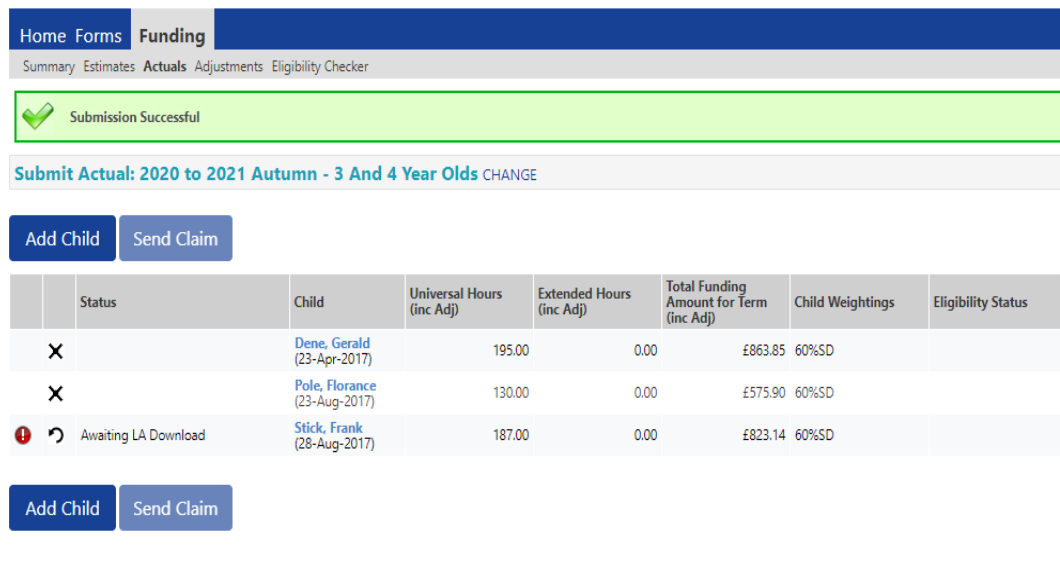
The following errors need to be fixed before the record can be saved:
 Weeks Attended in Term must be entered (Funding Details Tab)

*denotes mandatory fields

Resolved all errors to enable saving

8. Submitting headcount

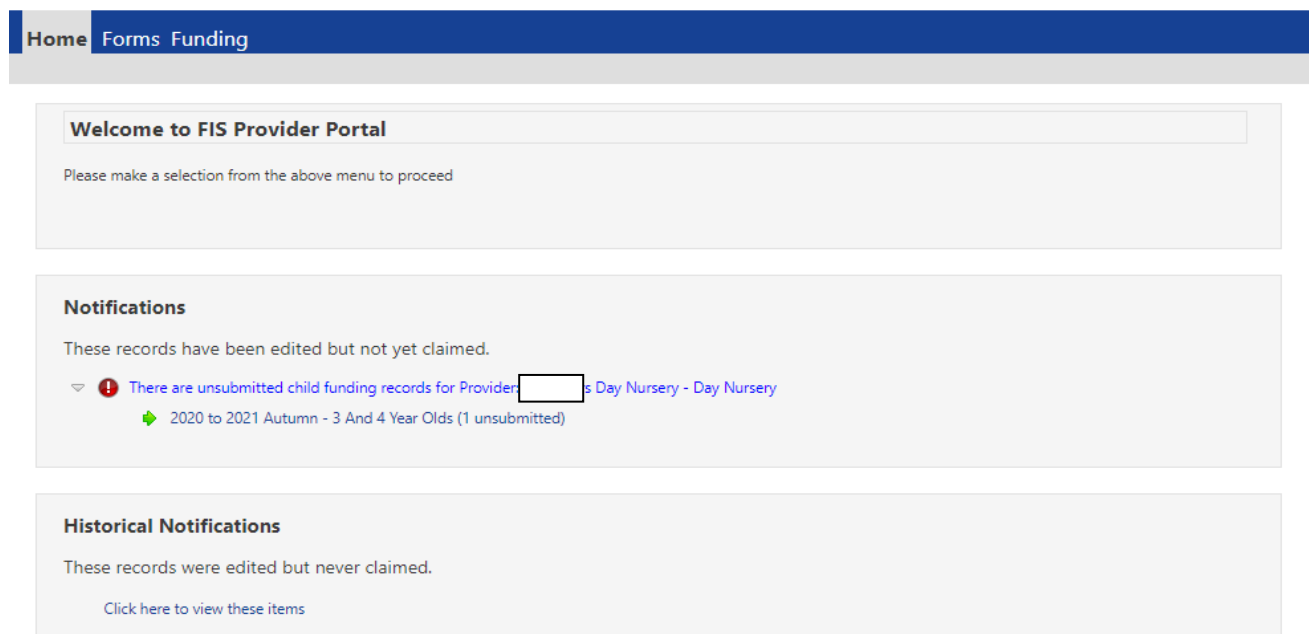
Once Headcount is completed for the period, click 'Send Claim'. A message with a green tick will pop up to confirm Submission has been successful. The status column confirms if anything has been changed on that record.



The screenshot shows the 'Funding' section of the Synergy portal. At the top, there are navigation tabs: 'Home', 'Forms', and 'Funding'. Below these are sub-tabs: 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A green banner with a checkmark icon and the text 'Submission Successful' is displayed. Below this is a link: 'Submit Actual: 2020 to 2021 Autumn - 3 And 4 Year Olds CHANGE'. There are two buttons: 'Add Child' and 'Send Claim'. A table with 8 columns is shown: 'Status', 'Child', 'Universal Hours (inc Adj)', 'Extended Hours (inc Adj)', 'Total Funding Amount for Term (inc Adj)', 'Child Weightings', and 'Eligibility Status'. The table contains three rows of data. The first two rows have a status of 'X', and the third row has a status of 'Awaiting LA Download' with a red warning icon and a refresh icon. Below the table are two more buttons: 'Add Child' and 'Send Claim'.

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Dene, Gerald (23-Apr-2017)	195.00	0.00	£863.85	60%SD	
X	Pole, Florance (23-Aug-2017)	130.00	0.00	£575.90	60%SD	
⚠️ ↻ Awaiting LA Download	Stick, Frank (28-Aug-2017)	187.00	0.00	£823.14	60%SD	

If the submission button has not been clicked, when next logging into Synergy a message will appear stating there are un-submitted changes.



The screenshot shows the 'FIS Provider Portal' with a navigation bar containing 'Home', 'Forms', and 'Funding'. A 'Welcome to FIS Provider Portal' message is displayed, followed by the instruction 'Please make a selection from the above menu to proceed'. Below this is a 'Notifications' section with the text 'These records have been edited but not yet claimed.' and a notification: 'There are unsubmitted child funding records for Provider [redacted] s Day Nursery - Day Nursery' with a sub-notification: '2020 to 2021 Autumn - 3 And 4 Year Olds (1 unsubmitted)'. At the bottom is a 'Historical Notifications' section with the text 'These records were edited but never claimed.' and a link: 'Click here to view these items'.

9. Adjustments

All adjustments are to be completed within five working days of the change.

This is where adjustments to children who are on the system already can be made. Also listed are adjustments that have been generated and whether they have been paid or not.

View Adjustments: 2020 to 2021 Summer - 3 And 4 Year Olds CHANGE

▼ **Paid with Actuals** - Total: £615.00, Paid Date: 04-Aug-2020

Type	Date Added	Child Name	Date of Birth	No. of Hours	Override Rate per Hour	Total Child Weighting Amount	Total Amount @ Provider Rate	Amount	Reason
Child	31-Jul-2020	<input type="text"/>	04-Sep-2015					£615.00	System generated adjustment for [DAF].

Please email the Authority to request changes to the adjustments.

Send E-Mail

9.1 Why should I send an adjustment email?

An adjustment should be for the following reasons:

- If a child increases their hours, obtain a new signed parent declaration form, and use the adjustment tab to send an adjustment. Send the new parent declaration form.
- If a child decreases their hours, use the adjustment tab, complete all questions and press send.
- If Synergy is closed and access to the current term is denied, any children who start late or leaves early will also need an email adjustment. For late starters, a parent declaration form is required.

9.2 How do I send an adjustment email?

To complete an adjustment please click:

Please email the Authority to request changes to the adjustments.

Send E-Mail

Please send the generic email giving the reasons for the adjustment:

The screenshot shows a 'Send E-Mail' window with the following fields:

- To: FIS@bedford.gov.uk
- CC: (empty)
- From*: Enter Your Email Address (with callout: Enter your email address here)
- Subject: Provider: Tester Day Care Funding Adjustment request
- Body*:
 - 4 Year Olds
 - Please complete the following:
 - Child's Forename:
 - Child's Surname:
 - Child's Date of Birth:
 - Child's Address:
 - Child's Postcode:
 - Please state reason for adjustment:
 - If Late Starter - please provide Start Date:
 - If Leaver - please provide last date of attendance:
 - CURRENT Universal Hours:
 - NEW Universal Hours:
 - Date when NEW Universal hours commence:
 - CURRENT Extended Hours:
 - NEW Extended Hours:
 - Date when NEW Extended hours commence:

*denotes mandatory fields

Buttons: Send, Cancel

Please make sure **all** questions are answered (scroll down to reach the bottom of the email).

Please note: if Synergy is still open and a new child has started or a child has left the setting, an adjustment is NOT needed; please add the new child or adjust the child's end date and number of weeks attended in the actuals and resubmit.

Adjustments will be made at the end of every term. These will appear on both the termly summary tab and child's individual summary page.

10. Eligibility Checker

Checks on eligibility codes can be carried out here, with permission from the parent, **before** the child starts attending the setting. On this tab, click the 'Eligibility Check' button and there will be a pop-up as shown below:

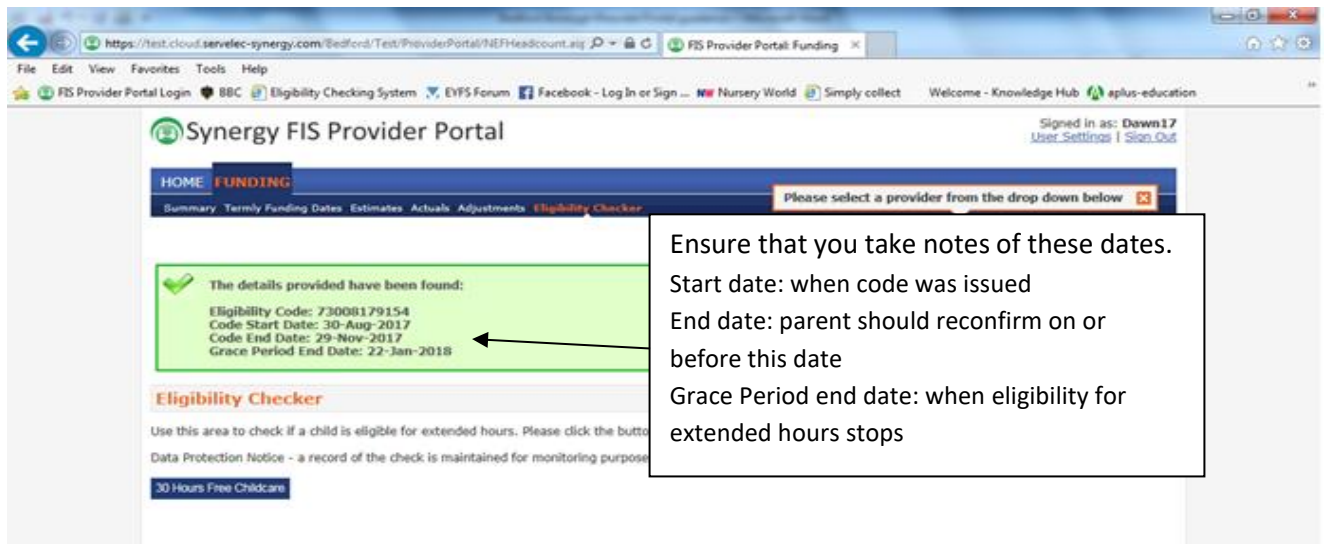
The screenshot shows a '30 Hours Free Childcare' form with the following fields:

- Eligibility Code*
- Child Date of Birth*
- Parent/Carer Forename
- Parent/Carer Surname
- Parent/Carer NI Number*
- Consent must be given for this
 - Eligibility Check
- Partner Forename
- Partner Surname
- Partner NI Number

*denotes mandatory fields

Buttons: Submit, Cancel

Enter the details in the fields that show *. Click 'Submit' and a message will appear showing the information needed about that child's eligibility:



Please note that if the child then starts at your setting, they will need to be added onto headcount and the eligibility code checked as instructed.

For a code to be valid settings must ensure that:

- It is the term after the child's birthday or the term after the child is 9 months – please refer to Section 3, Page 4 of this User Guide
- The Validity Start Date is before the first day of the term you wish to claim funding for
- The Validity End Date is on or after the first day of the term you wish to claim funding for

Where a parent/carer is issued with their eligibility code after the beginning of term their child became age eligible, they will not be able to take up the expanded/extended hours until the start of the next term. Settings therefore must check the eligibility code 'issued date' is before the start of the term in which you are to claim expanded/extended hours for.

Once you have read the guidance, if there are any problems, please email funding@bedford.gov.uk