



# **Bedford Borough Provider Portal**

## **User Guide for Synergy**

### **1 January 2026**

### **Version 13**

# Contents

## Page No.

1.	<b>When can a child access their funding?</b> .....	4
2.	<b>Where and how to access the Provider Portal</b> .....	4
3.	<b>Provider Portal - logging in and out</b> .....	4
	Security Questions – how to set up and answers to questions.....	5
4.	<b>Home Page</b> .....	6
5.	<b>My Details Tab - Census Details</b> .....	6
6.	<b>Funding Tab</b> - How to find the right term and funding age group for your claim .....	7
6.1.	<b>Summary</b> - shows financial information for the term including estimates, actuals, Early Years Pupil Premium (EYPP), Social Deprivation Funding, Disability Access Funding (DAF) .....	8
6.2.	<b>Estimates</b> - how to enter the details .....	9
6.3.	<b>Actuals</b> - list of children on your claim.....	10
6.3.1.	<b>Summary</b> - of the child's claim .....	11
6.3.2.	<b>Child Details</b> .....	11
6.3.3.	<b>Parent / Carer Details</b> - includes consent tick boxes for checking EYPP and eligible codes .....	12
6.3.4.	<b>Funding Details</b> – default term dates, weeks attended in term, present during census box, attends two days or More .....	13
	How to claim DAF .....	13
	Stretching the entitlement .....	13

	Funding Type – Two Year Olds only .....	13
6.3.5.	<b>Documents</b> – how to upload the parent declaration form and any other form on to the individual child record .....	16
6.3.6.	<b>Notes</b> .....	16
6.3.7.	<b>Stretching the Offer</b> .....	16
6.3.8.	<b>Adding New Children</b> - Please remember adding a funded 2 year old is done differently to adding a funded 3 or 4 year old .....	18
	<b>Late Starter</b> .....	19
	<b>Leaver</b> .....	19
7.	<b>‘It Won’t Save!’</b> - Any errors messages written in red need to be resolved before you can save .....	19
8.	<b>Submitting Headcount</b> - How do I know it has been submitted? .....	20
9.	<b>Adjustments</b> - Must be actioned within 5 working days of the change... ..	21
9.1.	Why should I send an adjustment email? .....	21
9.2.	How to send an adjustment email? .....	21
10.	<b>Eligibility Checker</b> - How do I know the eligibility code is valid? .....	22

# Bedford Borough Provider Portal: User guide

## 1. When can a child access their funding?

### 9 months or Child's Birthday

1 September to 31 December

1 January to 31 March

1 April to 31 August

### When they can get their hours from

Term starting on or after 1 January

Term starting on or after 1 April

Term starting on or after 1 Sept

## 2. Where and how to access the Provider Portal

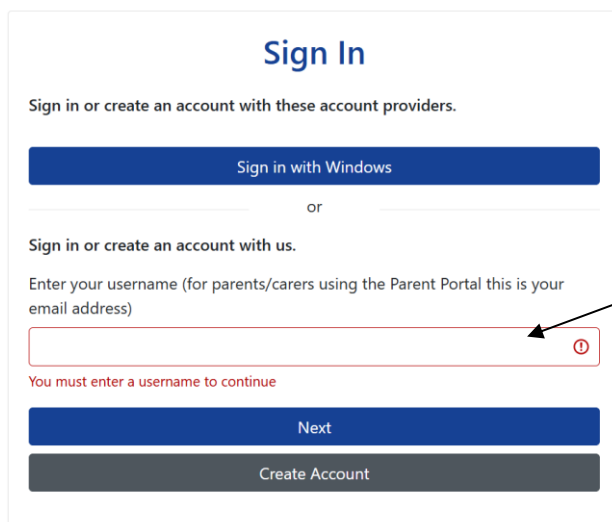
Bedford Borough has a new website, which means there is a change to the location of the Provider Portal

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

Go to the Bedford Borough website ([www.bedford.gov.uk](http://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.

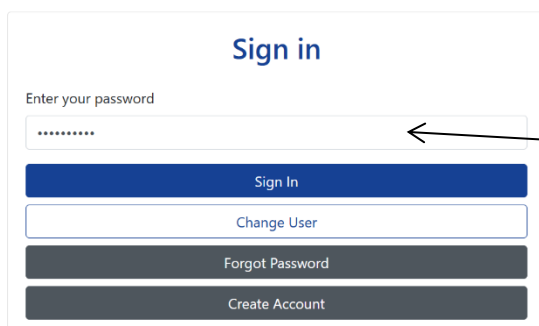
## 3. Provider Portal – Logging in and out



The screenshot shows the 'Sign In' page. At the top, it says 'Sign in or create an account with these account providers.' Below this is a blue button labeled 'Sign in with Windows'. Underneath is the word 'or'. Then it says 'Sign in or create an account with us.' followed by the instruction 'Enter your username (for parents/carers using the Parent Portal this is your email address)'. There is a text input field with a red border and a red 'i' icon. Below the field is the text 'You must enter a username to continue'. At the bottom are two buttons: a blue 'Next' button and a grey 'Create Account' button.

Enter your username that was provided as part of your log in details, then press

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



The screenshot shows the password entry page. At the top, it says 'Sign in'. Below this is the instruction 'Enter your password' followed by a password input field with a red border and a red 'i' icon. Below the field are four buttons: a blue 'Sign In' button, a white 'Change User' button, a grey 'Forgot Password' button, and a grey 'Create Account' button.

Enter the password here

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 screen. At the top is a navigation bar with links: Home, Forms, Funding, and My Details. Below the navigation bar is a welcome message: "Welcome to FIS Provider Portal" followed by the instruction "Please make a selection from the above menu to proceed". Further down is a section titled "Historical Notifications" 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.**

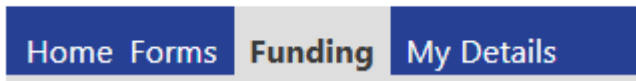
Both answers will need to be changed to something memorable. Highlight one question at a time and change the answer from **Bedford** to your new answer, pressing 'Save' when completed.

The screenshot shows the "Account Security" tab selected, with the sub-tab "Authentication Questions". The main heading is "Please change your authentication questions below". A note states: "If an asterisk is displayed in front of an authentication question then the question has not yet been assigned a personal answer." Below this, two questions are listed with asterisks: "\* Favourite Place (Provider)" and "\* Mothers Maiden Name (Provider)". A yellow warning box says: "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 questions are three input fields labeled "Old Answer:", "New Answer:", and "Confirm New Answer:". A "Save" button is located at the bottom right.

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

This screenshot is similar to the previous one, showing the "Authentication Questions" screen. However, the asterisks have been removed from the questions: "Favourite Place (Provider)" and "Mothers Maiden Name (Provider)". A green success message at the bottom states: "New answer successfully saved." The "Save" button is no longer visible.

## 4. Home Page



There will be 4 tabs: Home, Forms, Funding and My Details (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'** there may be forms to fill in on this tab from time to time; settings will be notified

**'Funding'** contains headcount information.

**'My Details'** contains the census information.

## 5. My Details Tab

From January 2026, census details are required each term and must be submitted along with the headcount information. Census details must be entered and saved before the claim is submitted.

Click on the term that is being completed, and census questions will appear:

All boxes will need to be completed.

Count the number of children in all the age-bands carefully and in line with the number of children that are on the funding claim for that term; if there are no children in that age-band, enter 0

Under 'Establishment Characteristics' the number of weeks open is either 38 (term time only settings) or the number of weeks that you are open for longer/shorter than term time.

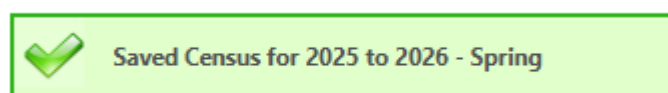
Under 'Staff Information' the top box is the total number of staff who work with children. Boxes underneath this must add up to the total number of staff in the top box.

Once all boxes have an answer, press Save



If there are mistakes within the details entered, there will be a notification in red above the Save button and a red exclamation mark next to the box with the mistake. Correct any mistakes before saving.

A successful save will result in a message at the top of the page and the last save date will be noted at the bottom of the page:




Last Save Date 18-Nov-2025 13:23:12



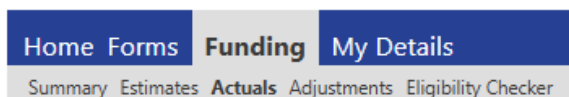
Press 'Cancel' to delete the details.

If the census details have not been entered, there will be a message regarding the census at the top of the page when completing Actuals on the Funding tab.

 To support the LA in their statutory duty to return the Early Years Census, you must enter and save your Census related details before being able to submit this claim. This is performed using My Details > Census.

## 6. Funding Tab

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



### Select Year and Term

2025 to 2026

 Summer

Submission Period:  
06-Mar-2025 to 18-Jul-2025

 Spring

Submission Period:  
01-Nov-2025 to 20-Feb-2026

 Autumn

Submission Period:  
22-Jun-2025 to 26-Sep-2025

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, 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 working family 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

Home Forms Funding	
Summary	Estimates Actuals Adjustments Eligibility Checker
Summary: 2024 to 2025 Summer - 2 Year Olds CHANGE	
Rate x Hours may not equal Totals as rounding is applied per child. The totals shown are the sum of the funding amounts per child.	
<b>Estimates</b>	<b>Actuals</b>
Term Length (Weeks)	Term Length (Weeks) Term Time
Provider Rate applied	Provider Rate applied to child funding
Estimate Funding	Base Rate
Hours Per Week	Funding
Term Funding Amount	Funded Hours for Term
Interim %	Funding Amount @ Provider Rate
Interim Amount Payable	Funding Amount
Total Interim Amount Paid to Date (Before Adj)	Expanded Funding
Interim Amount Payable Balance	Funded Hours for Term
	Funding Amount @ Provider Rate
	Expanded Funding Amount
	Totals
Number of Payments Due	Funded Hours for Term
Next Payment Amount Due (Before Adj)	Funding Amount @ Provider Rate
	Child Weightings
Fully Processed	Term Funding Amount
	Interim Amount Paid (Before Adj)
	Term Funding Amount Balance
	Adjustments Paid with Final Payment
	Actual Amount Paid (Inc. Adj)
	Processed
	Processed Date

Funding – 2 year old funded children (disadvantaged families)

Expanded Funding – working family funding



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; noting this may already be filled in.
- Input the estimate amount for total **weekly** funded hours for all funded children and then select the 'calculate' button. This calculates the total number of hours for that term.

Submit Estimate: 2025 to 2026 Spring - 2 Year Olds (new) [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 if it is **before the estimate deadline date**. When working out estimates, it is for all children attending, not just the additional child.

**Please note:** Settings can see if estimates have been submitted by clicking on the 'Estimates' tab. If 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:

This section is for: deleting children, editing existing children, adding new children and submitting actual headcount data. If using the system for the first time, all data needs adding.

**Summary Head Count Records for 2025 to 2026 - Autumn**

2025 to 2026	
Summer	
Autumn	
2024 to 2025	

	Funding Type
	+9 Months (New)
	2 Year Olds (New)
	3 And 4 Year Olds

Home Forms **Funding** My Details

Summary Estimates **Actuals** Adjustments Eligibility Checker

To support the LA in their statutory duty to return the Early Years Census, you must enter and save your Census related details before being able to submit this claim. This is performed using My Details > Census.

**Submit Actual: 2025 to 2026 Spring - 3 And 4 Year Olds** CHANGE

Add Child Send Claim

	Status	Child	Funded Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	New, Unsubmitted Child	Bloggs, Fred (23-Mar-2022)	165.00	0.00	£884.40		

Add Child Send Claim

- 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; click 'yes'.

**Request Delete**

Are you sure you want to request the deletion of child: Pole, Florance from this headcount record? Delete requests are automatically submitted but can be cancelled.

Yes No

- 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.

Term	
Term Start Date	01-Sep-2020
Term End Date	31-Dec-2020
No of weeks attended	17.00
Nominated for DAF	No
Provider Total Rate	£4.12

Universal Funding	
Funded Hours Per Week	10.00
Funded Hours for Term	170.00
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

### 6.3.2 Child Details:

Do not press save until all details are complete, otherwise an error message will appear. Remember, synergy may 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**

Forename\*

Middle Name

Surname\*

DOB\*

Proof of DOB ☐

Gender\* ☐ Male ☐ Female

Preferred Surname

Ethnicity\*

SEN COP Stage\*

SEN Special Need Primary

SEN Special Need Secondary

**Search for an Address**

Primary

Postcode\*

**Ethnicity & SEN COP Stage must be completed, choose from the drop down box by clicking on the arrow**

**If SEN Support or EHCP is selected, SEN Special Need Primary will also need to be completed**

Choose from the list on the drop down by clicking the arrow

If nothing is selected, there will be an error when saving; a red asterisk will mark the box

SEN Support

SEN Line 1\*

SEN Line 2

SEN Line 3

Save Cancel

\*denotes mandatory fields

### 6.3.3 Parent/Carer Details:

Parent's details will need to be completed; the system will check for EYPP, Working Family Eligibility and additional support funding (previously known as disadvantaged 2s) 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**

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

☐ Additional Support

**Partner Details**

Forename

Surname

DOB

Email

Contact Number

☐ NI or ☐ NASS Number

Tick to give consent to Eligibility Checking for

☐ EYPP

☐ Working Family Eligibility

☐ Additional Support

Switch

**Consent for Eligibility Checking:**

**EYPP:** The Surname, DOB and NI or NASS Number will also be required for this data to be used for an Eligibility Check.

**Working Family:** The Surname and NI Number will also be required for this data to be used for an Eligibility Check.

**Additional Support:** The Surname, DOB and NI Number will also be required for this data to be used for an Eligibility Check.

This button switches the details of Parent/Carer Details that have been entered

Please note these messages will appear of the mandatory areas are not filled in

A signed parent declaration form means that a parent/carers has given consent for an eligibility check to be performed for both EYPP and expanded/extended hours checks – ensure that both boxes are ticked. 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 the setting is open for that term. **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.** DAF can now be added to all 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; this will only appear if the stretched offer has been set up.

‘Funding Type’ (two year olds only)

Settings can now check eligibility for working families and 2 year olds receiving additional support funding (‘Disadvantaged 2 year olds’)

Families in receipt of additional support Funding – Funded two year olds with an EY Code

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

Please note, this will be Extended for 3&4 year olds

Child Details Parent / Carer Details Funding Details Documents Notes

**Funding Details**

Start Date\*

End Date\*

Default Term Dates

Weeks Attended in Term\*

Present during Census ☒

Attends Two Days or More ☐

Nominated for DAF\* ☐ Yes ☐ No ☐

**Funded Hours per Week**

Eligible for Funded Hours ☒

Click to check eligibility for 2-year-old receiving additional support funding

Hours\*

**Expanded Funded Hours per Week**

Eligible for Expanded Hours ☒

Eligibility Code

Click to check eligibility for Working Family funding

Expanded Hours\*

**Total Funded Hours per Week**

Total Funded:

**Attendance Days**

Attends Monday\* ☐ Yes ☐ No

Attends Tuesday\* ☐ Yes ☐ No

Attends Wednesday\* ☐ Yes ☐ No

Attends Thursday\* ☐ Yes ☐ No

Attends Friday\* ☐ Yes ☐ No

Attends Saturday\* ☐ Yes ☐ No

Attends Sunday\* ☐ Yes ☐ No

**Non-Funded Hours per Week**

Non-Funded Hours\*

An Eligibility Check for 2-year-old receiving additional support funding must be carried out if claiming Funded Hours.

**Census Information**

Funded Entitlement Weeks

Expanded Entitlement Weeks

Records the Number of Weeks the Child is expected to access their Funded/Expanded hours across the Child's eligibility year (3 terms), in line with the parental declaration form.

**Maximum Values Allowed:**

Number of Weeks: 14.00

Funded Weekly Hours: 10.00

Funded Termly Hours: 140.00

Funded Yearly Hours: 380.00

Expanded Weekly Hours: 10.00

Expanded Termly Hours: 280.00

Expanded Yearly Hours: 570.00

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

To check Funded hours, press 'Check Eligibility'

Enter the number of hours that are being claimed

To check expanded or extended hours (working families) enter the 11 Digit Code and press 'check eligibility code'

Enter the number of funded hours being claimed in each section

For 3 & 4 year olds, 'Funded Hours per Week' are Universal Hours that do not need a code

Enter 0 into any boxes where funding is not being claimed

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 'Funded' and 5 'Expanded' or 'Extended', depending on the age of the child.

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.**

'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.**

Home Forms Funding  
Summary Estimates Actuals Adjustments Eligibility Checker  
Name: Florance Pole DOB: 23-Aug-2017

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

Number of weeks: this is the maximum number of weeks in this block for the current term. This may 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**

Attendance Days

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

Funded Hours per Week

Funded Hours\*

If child attends at another setting as well as yours, be sure to enter the number of hours that has been agreed with the child's parent/carer

Values Allowed:

17 Weeks: 17.00

Weekly Hours: 12.83

Termly Hours: 193.18

Yearly Hours: 570

Weekly Hours: 12.83

Termly Hours: 193.18

Yearly Hours: 570

## Census Information

### 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

Save Cancel \*denotes mandatory fields

Press save once the declaration form is attached

	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.

Name: Yasmin Flower DOB: 28-Sep-2013

Summary Child Details Funding Details Parent / Carer Details Notes

Add a new note

Notes History

No Historical Notes

### 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 number of hours a week. 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 setting 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 number 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](mailto: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:

Add Child / Enter EY Voucher Code

Please enter the EY Voucher Code for this funded two year old

Continue Return

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:

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

**Save Record Failed Due To The Errors Listed Below**

Name: Frank Stick DOB: 28-Aug-2017

Summary Child Details Parent / Carer Details **Funding Details** Documents Notes

**Funding Details**

Start Date\* 01-Sep-2020

End Date\* 31-Dec-2020

Default Term Dates

Weeks Attended in Term\* \*

Present during Census ☒

Attends Two Days or More ☒

Nominated for DAF\* ☐ Yes ☒ No

Stretching Entitlement ☒

**Universal Funded Hours per Week**

Universal Hours\* 10.00

**Extended Funded Hours per Week**

Extended Hours\* 0.00

30H Eligibility Code

30 Hours Free Childcare

Eligible for 30H ☐

**Total Funded Hours per Week**

Total Funded: 10.00

**Attendance Days**

Attends Monday ☒ Yes ☐ No

Attends Tuesday ☐ Yes ☒ No

Attends Wednesday ☒ Yes ☐ No

Attends Thursday ☐ Yes ☒ No

Attends Friday ☒ Yes ☐ No

Attends Saturday ☐ Yes ☒ No

Attends Sunday ☐ Yes ☒ No

**Non-Funded Hours per Week**

Non-Funded Hours\* 3.00

**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

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

Save Cancel

\*denotes mandatory fields


Resolve 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.



[Home](#) [Forms](#) [Funding](#)

[Summary](#) [Estimates](#) [Actuals](#) [Adjustments](#) [Eligibility Checker](#)

 Submission Successful

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

[Add Child](#) [Send Claim](#)

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

[Add Child](#) [Send Claim](#)

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



[Home](#) [Forms](#) [Funding](#)


Welcome to FIS Provider Portal

Please make a selection from the above menu to proceed

**Notifications**

These records have been edited but not yet claimed.

  There are unsubmitted child funding records for Provider:

 2020 to 2021 Autumn - 3 And 4 Year Olds (1 unsubmitted)

**Historical Notifications**

These records were edited but never claimed.

[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.

[Home](#)
[Forms](#)
[Funding](#)

[Summary](#)
[Estimates](#)
[Actuals](#)
[Adjustments](#)
[Eligibility Checker](#)

[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	Bozorgi						£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' dialog box. The 'To' field is filled with 'FIS@bedford.gov.uk'. The 'From' field is empty and has a callout box pointing to it with the text 'Enter your email address here'. The 'Subject' field is filled with 'Provider: Tester Day Care Funding Adjustment request'. The 'Body' field contains the following text:

```

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:
  
```

At the bottom of the dialog, there is a note: '\*denotes mandatory fields' and two buttons: 'Send' and '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' eligibility checker pop-up. It contains 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

At the bottom, there is a note: '\*denotes mandatory fields' and two buttons: 'Submit' and '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:

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker

 The details provided have been found:  
Eligibility Code: 50150871279  
Code Start Date: 13-Feb-2025  
Code End Date: 15-Oct-2025  
Grace Period End Date: 31-Dec-2025

**Eligibility Checker**  
IMPORTANT:  
Families must obtain a code before their child takes up a place, therefore the C  
Summer Term - Code Start Date must be on or before 31 March  
Autumn Term - Code Start Date must be on or before 31 August  
Spring Term - Code Start Date must be on or before 31 December  
CHECK THE CODE START DATE is valid for the term that the child is taking up their place; codes with invalid start dates cannot be funded  
CHECK THE CODE END DATE has not expired before the term that the child is taking up their place with you. Only children already in a Working Family funded place are covered by the grace period  
If the message 'The details provided for the Eligibility Code are not eligible for working family hours' is displayed, the details that are entered are mistyped or incorrect. Please check and try again  
Click the button below to validate the Working Family Code  

Eligibility Checker

Please note, the colour of the box is just to grab the user's attention

Ensure that you take notes of these dates.

Start date: when code was issued

End date: parent should reconfirm on or before this date

Grace Period end date: when eligibility for extended hours stops

Use these messages to check the dates of the codes are eligible for the term you are offering a place

**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](mailto:funding@bedford.gov.uk)