



**BEDFORD**  
BOROUGH COUNCIL



# **Bedford Borough Provider Portal**

## **User Guide for Synergy**

**1 January 2026**

**Version 13**

**Servelec**  
Together for Digital Care

Version 25.3

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# Bedford Borough Provider Portal: User guide

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

<b>9 months or Child's Birthday</b>	<b>When they can get their hours from</b>
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**

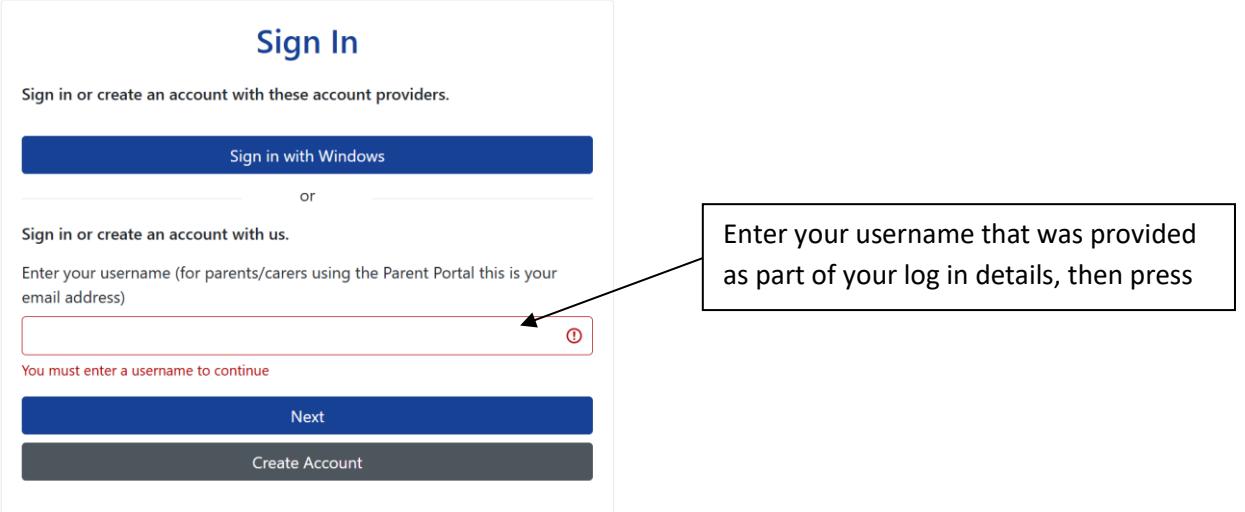
Bedford Borough has a new website, which means there is a change to the location of the Provider Portal

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

Go to the Bedford Borough website ([www.bedford.gov.uk](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 be notified.

## **3. Provider Portal – Logging in and out**



**Sign In**

Sign in or create an account with these account providers.

Sign in with Windows

or

Sign in or create an account with us.

Enter your username (for parents/carers using the Parent Portal this is your email address)

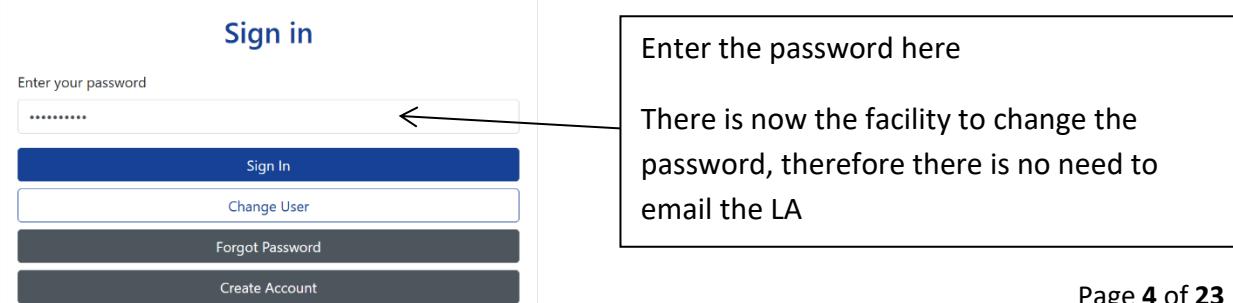
You must enter a username to continue

Next

Create Account

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:



**Sign in**

Enter your password

.....

Sign In

Change User

Forgot Password

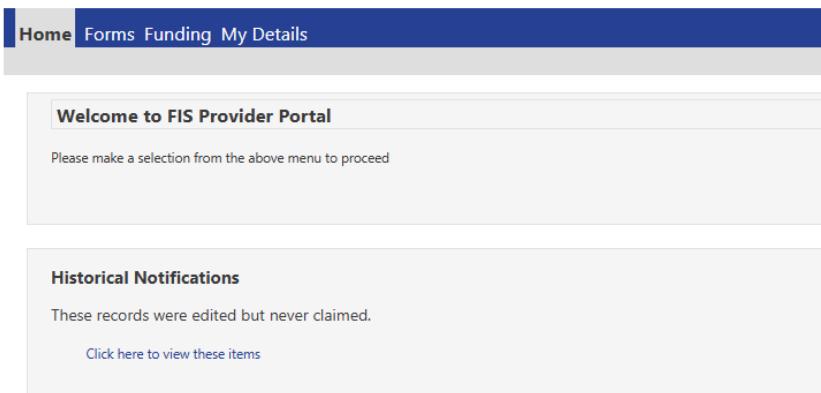
Create Account

Enter the password here

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

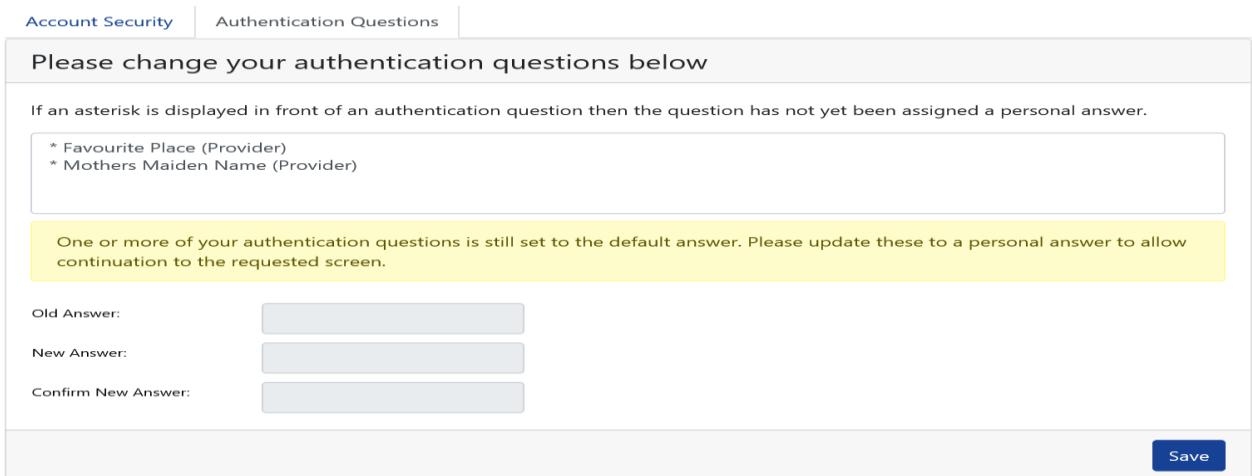
Follow the instructions on the screen to change the password. Once the password has been changed, the home screen will be accessible.

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

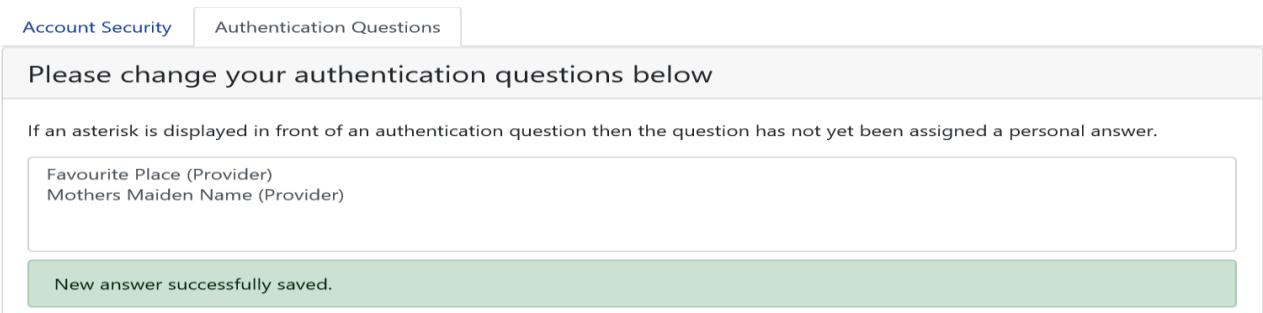


Click on the 'funding' tab at the top to see the following screen. There are two security questions; **both have the pre-set answer of 'Bedford', select the three characters asked for.**

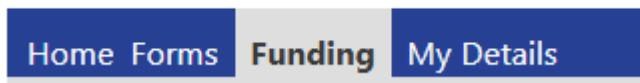
Both answers will need to be changed to something memorable. Highlight one question at a time and change the answer from **Bedford** to your new answer, pressing 'Save' when completed.



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



#### 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:

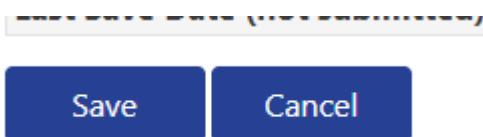
All boxes will need to be completed.

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:



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.



## 6. Funding Tab

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

A screenshot of the 'Funding' tab interface. At the top, there is a navigation bar with tabs: 'Home Forms', 'Funding' (which is highlighted in blue), and 'My Details'. Below the navigation bar is a sub-navigation bar with links: 'Summary', 'Estimates', 'Actuals' (which is highlighted in blue), 'Adjustments', and 'Eligibility Checker'. The main content area is titled 'Select Year and Term'. A dropdown menu shows '2025 to 2026' as the selected year. Under this, there are three entries: 'Summer' (red symbol, red exclamation mark), 'Submission Period: 06-Mar-2025 to 18-Jul-2025'; 'Spring' (green symbol, green checkmark), 'Submission Period: 01-Nov-2025 to 20-Feb-2026'; and 'Autumn' (red symbol, red exclamation mark), 'Submission Period: 22-Jun-2025 to 26-Sep-2025'. To the right of the dropdown, there are two callout boxes: one for the Summer term stating 'Red symbol: Terms that are finished – payments have been processed.' and one for the Spring term stating '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

The screenshot shows the 'Funding' tab for the '2024 to 2025 Summer - 2 Year Olds' term. The 'Actuals' section is highlighted with arrows pointing to two callout boxes:

- Funding – 2 year old funded children (disadvantaged families)**
- Expanded Funding – working family funding**

The 'Actuals' section displays the following data:

Category	Value
Term Length (Weeks)	13.00
Provider Rate applied	£5.86
Funding	0.00
Funded Hours for Term	0.00
Funding Amount @ Provider Rate	0.00
Funding Amount	0.00
Expanded Funding	0.00
Funded Hours for Term	0.00
Funding Amount @ Provider Rate	0.00
Expanded Funding Amount	0.00
<b>Totals</b>	
Funded Hours for Term	0.00
Funding Amount @ Provider Rate	0.00
Child Weightings	0.00
Term Funding Amount	0.00
Interim Amount Paid (before Adj)	0.00
Term Funding Amount Balance	0.00
Adjustments Paid with Final Payment	0.00
Actual Amount Paid (inc. Adj)	0.00

Other sections visible include 'Estimates' and 'Adjustments'.

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'

[Calculate](#) [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.



Submission 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.

2025 to 2026		
Summer		
Autumn		+9 Months (New)
2024 to 2025		
Autumn		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'.



- 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

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	17.00

**Funding Amount @ Provider Rate**

Child Weightings	£700.40
60% Social Deprivation (£0.31)	£52.70

**Universal Funding Amount**

£753.10
---------

**Totals**

Funded Hours Per Week	10.00
Funded Hours for Term	17.00
<b>Total Funding (excl. Adj)</b>	<b>£753.10</b>
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, 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 Parent / Carer Details Funding Details Documents Notes

**Child Details**

Forename\* [Red box]  
Middle Name  
Surname\* [Red box]  
DOB\* [Red box]  
Proof of DOB  
Gender\* [Red box]  
Preferred Surname  
Ethnicity\* [Red box]  
SEN COP Stage\* [Red box]  
SEN Special Need Primary  
SEN Special Need Secondary

**Search for an Address**

Primary [Red box]  
Postcode\* [Red box]  
Search

Add  
Add  
Add  
Add  
Loca  
Town  
County  
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

Home Forms **Funding** My Detail

Summary Estimates Actuals Adjustments Eligibility

Child Details Parent / Carer Details Funding Details Documents Notes

**Child Details**

Forename\* Middle Name Surname\* DOB\* Proof of DOB Gender\* Preferred Surname Ethnicity\* SEN COP Stage\*

SEN Special Need Primary SEN Special Need Secondary

**SEN Support**

<Unknown> Autistic Spectrum Disorder Down Syndrome Hearing Impairment Moderate Learning Difficulty Multi-Sensory Impairment No Not Answered Other Difficulty/Disability Physical Disability Profound & Multiple Learning Difficulty Severe Learning Difficulty Social, Emotional And Mental Health Social, Emotional and Mental Health Specific Learning Difficulty Speech, Language and Communication Needs Visual Impairment Yes

Address Line 1\* Address Line 2 Address Line 3 Town County Postcode\*

Save Cancel \*denotes mandatory fields

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

### 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**

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

EYPP  Working Family Eligibility  Additional Support

**Partner Details**

Forename Surname DOB Email Contact Number  NI or  NASS Number

EYPP  Working Family Eligibility  Additional Support

**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.

Switch

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 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

Yes  No

Nominated for DAF\*  Yes  No

**Funded Hours per Week**

Eligible for Funded Hours  X

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

Hours\*

**Check Eligibility**

**Non-Funded Hours per Week**

Non-Funded Hours\*

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

**Expanded Funded Hours per Week**

Eligible for Expanded Hours  X

Eligibility Code

Click to check eligibility for Working Family funding

Check Eligibility Code

Expanded Hours\*

**Total Funded Hours per Week**

Total Funded:

**Census Information**

Funded Entitlement Weeks

Expanded Entitlement Weeks

X 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: 220.00

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.**

**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 week.**

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

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

**Funded Hours per Week**  
Funded Hours\*

Child attends another setting as well as yours, be sure to enter the hours what has been agreed with the child's parent/carer

**Values Allowed:**

17.00
12.83
193.18
570

Weekly Hours: 12.83  
Termly Hours: 193.18  
Yearly Hours: 570

## Census Information

### Expanded Entitlement Weeks

0.00

⚠ 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

0.00

#### Extended Entitlement Weeks

0.00

⚠ 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						
<p><b>Supporting Documents</b> Please upload any documents which support this term.</p> <p>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.</p> <table border="1"> <thead> <tr> <th>Description*</th> <th>File Name</th> <th>Upload a file</th> </tr> </thead> <tbody> <tr> <td>No Documents Uploaded</td> <td></td> <td></td> </tr> </tbody> </table> <p><b>Save</b> <b>Cancel</b> <small>*denotes mandatory fields</small></p>						Description*	File Name	Upload a file	No Documents Uploaded		
Description*	File Name	Upload a file									
No Documents Uploaded											
<p>Click here: you will need to find your saved documents</p>											

<p><b>Supporting Documents</b> Please upload any documents which support this term.</p> <p>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.</p>		
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

Delete

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, Kayenat (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**

<b>Add Child</b>	<b>Enter EY Voucher</b>	<b>Send Claim</b>
<b>Add Child</b>	<b>Enter EY Voucher</b>	<b>Send Claim</b>

**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

**Submit** **Cancel**

<b>Add Child</b>	<b>Enter EY Voucher</b>	<b>Send Claim</b>
<b>Add Child</b>	<b>Enter EY Voucher</b>	<b>Send Claim</b>

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
Add Child	Enter EY Voucher

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

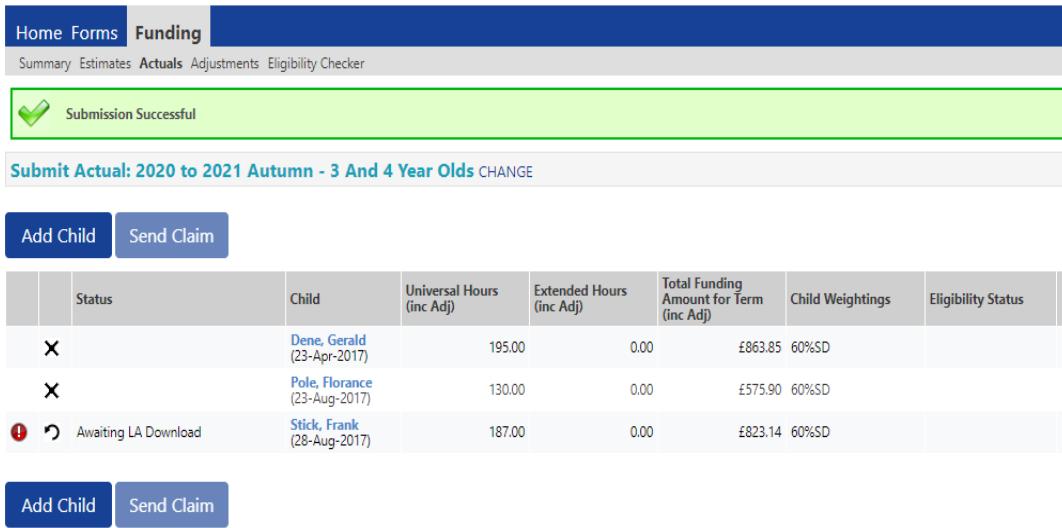
**Name: Frank Stick DOB: 28-Aug-2017**

Summary Child Details Parent / Carer Details Funding Details Documents Notes

<p><b>Funding Details</b></p> <p><b>Start Date*</b> 01-Sep-2020</p> <p><b>End Date*</b> 31-Dec-2020</p> <p><b>Default Term Dates</b></p> <p><input checked="" type="checkbox"/> Present during Census</p> <p><input checked="" type="checkbox"/> Attends Two Days or More</p> <p><b>Nominated for DAF*</b></p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input checked="" type="checkbox"/> Stretching Entitlement</p>	<p><b>Attendance Days</b></p> <p>Attends Monday <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Attends Tuesday <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Attends Wednesday <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Attends Thursday <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Attends Friday <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Attends Saturday <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Attends Sunday <input checked="" type="radio"/> Yes <input type="radio"/> No</p>
<p><b>Universal Funded Hours per Week</b></p> <p><b>Universal Hours*</b> 10.00</p> <p><b>Extended Funded Hours per Week</b></p> <p><b>Extended Hours*</b> 0.00</p> <p>30H Eligibility Code</p> <p><input type="checkbox"/> Eligible for 30H</p>	<p><b>Non-Funded Hours per Week</b></p> <p><b>Non-Funded Hours*</b> 3.00</p> <p><small>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</small></p>
<p><b>Maximum Values Allowed:</b></p> <p>Number of Weeks: 17.00</p> <p>Universal Weekly Hours: 12.83</p> <p>Universal Termly Hours: 193.18</p> <p>Universal Yearly Hours: 570</p> <p>Extended Weekly Hours: 12.83</p> <p>Extended Termly Hours: 193.18</p> <p>Extended Yearly Hours: 570</p>	
<p>The following errors need to be fixed before the record can be saved: Weeks Attended in Term must be entered (Funding Details Tab)</p> <p><small>*denotes mandatory fields</small></p> <p><span style="border: 1px solid #0070C0; padding: 2px;">Save</span> <span style="border: 1px solid #0070C0; padding: 2px;">Cancel</span></p> <p style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;">Resolve all errors to enable saving</p>	

## 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.

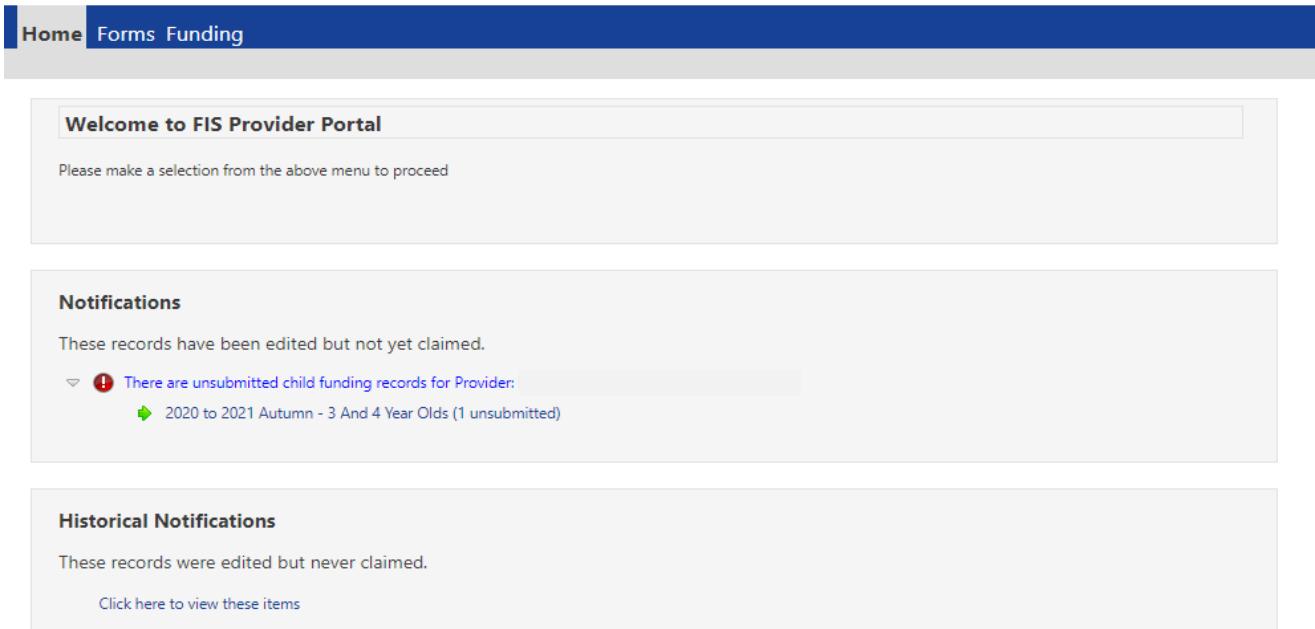


The screenshot shows the Synergy 'Funding' page. At the top, there are tabs for 'Home', 'Forms', and 'Funding'. Below the tabs are links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A green success message box displays a checkmark and the text 'Submission Successful'. Below this, a sub-header says 'Submit Actual: 2020 to 2021 Autumn - 3 And 4 Year Olds CHANGE'. There are 'Add Child' and 'Send Claim' buttons. The main content is a table with columns: 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:

	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, Florence (23-Aug-2017)	130.00	0.00	£575.90	60%SD		
!	Stick, Frank (28-Aug-2017)	187.00	0.00	£823.14	60%SD		

At the bottom are 'Add Child' and 'Send Claim' buttons.

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' welcome screen. It has a 'Home', 'Forms', and 'Funding' menu bar. A message box says 'Welcome to FIS Provider Portal' and 'Please make a selection from the above menu to proceed'. Below this is a 'Notifications' section. It says 'These records have been edited but not yet claimed.' and lists 'There are unsubmitted child funding records for Provider: 2020 to 2021 Autumn - 3 And 4 Year Olds (1 unsubmitted)'. There is also a 'Historical Notifications' section with 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	Bozorgi [REDACTED]	26-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:

**Send E-Mail**

To:

CC:

From\*:

Subject:

Body\*:

\*denotes mandatory fields

**Send** **Cancel**

**Enter your email address here**

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:

**30 Hours Free Childcare**

Please enter a valid Eligibility Code and Child Date of Birth, together with Parent/Carer Details. Partner Details are optional but if entered then all fields, except Forename, must be filled in.

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

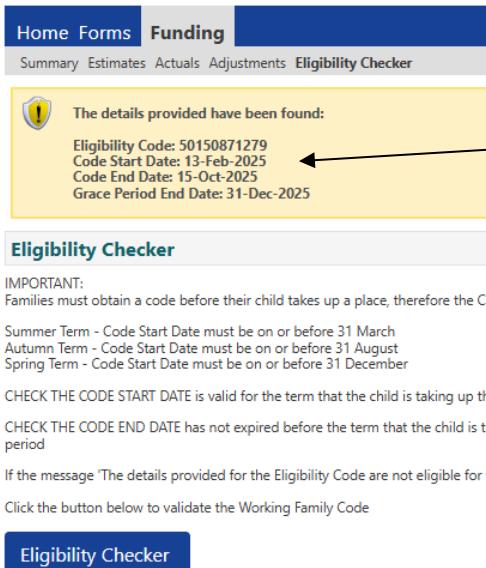
Partner Surname

Partner NI Number

\*denotes mandatory fields

**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, 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

IMPORTANT: Families must obtain a code before their child takes up a place, therefore the Code Start Date must be on or before 31 March

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 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)