



FIS Synergy Provider Portal for Early Years Funding

A guide for registered funded early years providers

SEPT 2017

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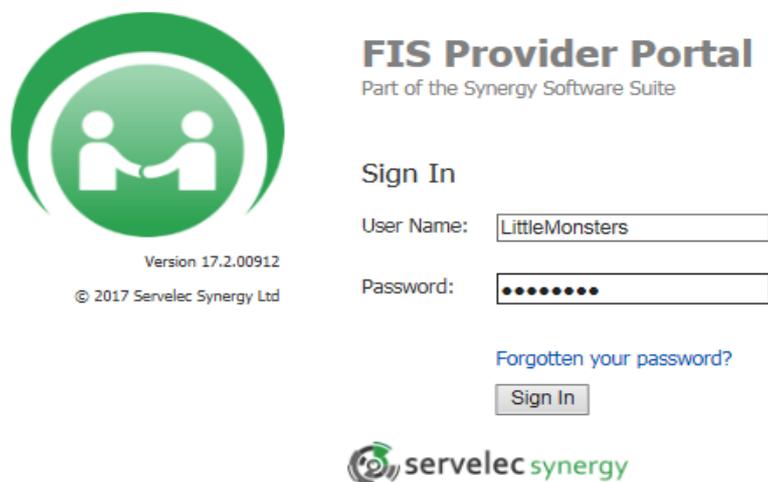
SYNERGY FIS PROVIDER PORTAL GUIDANCE

To access the Synergy FIS Provider Portal you will need an internet browser of Microsoft Internet Explorer 8 or higher. This can be downloaded for free at <http://windows.microsoft.com/en-GB/internet-explorer/products/ie/home>

Logging in

The website address is: <https://fisportal.northyorks.gov.uk>.

Enter your user name and password and select 'Sign In'. This will take you to the provider portal homepage. If you have forgotten your login details please contact the Families Information Service by telephoning 01609 533483.



FIS Provider Portal
Part of the Synergy Software Suite

Sign In

User Name:

Password:

[Forgotten your password?](#)



If you have forgotten your password, you can reset it yourself from the login screen by selecting the link 'Forgotten your password'. The system will send you an email with a link to reset your password.

Please note: if you attempt to login with an incorrect password more than three times, you will be locked out of the system. Please contact the Families Information Service on 01609 533483 to unlock your login.

Changing your password

You can change your password by clicking on the link 'User Settings' shown in the top right hand corner of the picture below. **Please note:** that passwords are case sensitive however, user names are not.

Password policy for providers: min of 6 characters including at least one upper and one number.
Please remember the Synergy FIS Provider Portal contains sensitive personal data about children.

After you have clicked on 'User Settings' you will be taken to the page shown below where you can change your password.

User Settings | **Authentication Questions**

Please change your details below:

New Username:

Current Password:

New Password:

Confirm New Password:

Confirm

Once the password has successfully been changed you should see a green submission successful bar:



On the homepage you will find key functions of the Synergy FIS Provider Portal. The Notifications section of this page will alert you to any headcount records that have been saved but not submitted. Unsubmitted records will not be funded.

Welcome to FIS Provider Portal - Please make a selection from the menu above to proceed

These are the key functions of the portal

Forms
EY Census form - Only to be used in January for Establishment Data Return
Provider Updates Form V2 - This form is used to add or update your setting details.

Please ensure your details are up to date.

Funding
 Displays 2 year old and 3 & 4 year old headcount by term.

Headcount: Autumn Term 2017 2nd - 6th Oct 2017 submission deadline 13th October

Staff
 Update or add any staff members here. All funded providers including funded Childminders must add a census contact.

Ofsted
 For information only- if any of these details are incorrect, please contact Ofsted directly.

Notifications

There are unsubmitted child funding records for provider: Little Monsters - Day Nursery

Summary Screen

Select **FUNDING** from the main menu, then **Summary** from the submenu.

You can use the Summary screen to view the estimate information we hold for each funding type in the current term. This section is for information only and can assist you in

understanding your monthly payments, the 'Actuals' information will be updated when the headcount has been finalised, towards the end of the term.

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates Estimates Actuals Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Little Monsters (Day Nursery) ▾

Summary: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [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.

Estimates		Actuals	
Term Length (Weeks)	15.00	Term Length (Weeks)	17.00
▶ Provider Rate applied	£3.90	▶ Provider Rate applied to child funding	£3.90
Estimate Funding		Universal Funding	
Hours Per Week	0.00	Funded Hours for Term	0.00
Term Funding Amount	£0.00	Funding Amount@ Provider Rate	£0
Interim %	100.00%	<hr/>	
Interim Amount Payable	£0.00	Universal Funding Amount	£0
<hr/>		Extended Funding	
Total Interim Amount Paid to Date (before Adj)	£0.00	Funded Hours for Term	0.00
		Funding Amount@ Provider Rate	£0
		<hr/>	
Interim Amount Payable Balance	£0.00	Extended Funding Amount	£0
		Totals	
Processed	No	Funded Hours for Term	0.00
Processed Date		Funding Amount@ Provider Rate	£0
		Child Weightings	£0
		<hr/>	
		Term Funding Amount	£0.00
		Interim Amount Paid (before Adj)	£0.00
		<hr/>	
		Term Funding Amount Balance	£0.00
		Adjustments Paid with Final Payment	£0.00
		<hr/>	
		Actual Amount Paid (Inc. Adj)	£0.00
		<hr/>	
Processed	No		
Processed Date			

Checking the eligibility of 30 hour voucher codes

There is a facility available on the portal to check the eligibility of 30H voucher codes at any point in the term. This enables you to check if children are eligible for the additional 15 hours of extended entitlement funding before offering them a funded place. No information is stored in the system when you use this facility, it is for checking purposes only and you must have received the parent's written permission that you can use their details – this should be from the Parental Agreement. To claim for extended hours you will be required to check the validity of the codes on each child's record when submitting your headcount. Please note, codes may be issued for children who are not three until the term following the one you are checking for, these children will not be eligible until they reach eligible age so cannot be claimed for.

Login to the provider portal and select 'Funding' and 'Eligibility Checker'



Eligibility Checker

Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.

Data Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system.

30 Hours Free Childcare

Click the '30 Hours Free Childcare' button.

Enter the eligibility code, child's DOB and parents NI number into the appropriate fields.

If the child is eligible for the extended entitlement funding you will see the following message, which will list three dates linked to the code.

Code Start Date – the date the code has been generated by HMRC.

Code End Date – the date the code is valid until, parents must reconfirm their eligibility by this date in order to receive funding the following term.

Grace Period End Date – the date that the child will be able to access funding until based on the current status of their code. This date will always run until the end of the current term.

 **The details provided have been found:**
Eligibility Code: 2222222222
Code Start Date: 29-Aug-2017
Code End Date: 12-Oct-2017
Grace Period End Date: 03-Nov-2017

If the code you are checking is invalid you will receive the message below. If you receive this message, you must contact the parent to confirm you that they have given the correct details, and if so, you cannot offer the extended entitlement hours. It is the responsibility of the parent to contact HMRC regarding their eligibility.

 **The details provided for Eligibility Code 1111111111 are not eligible for extended hours.**

Eligibility Checker

Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.

Data Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system.

30 Hours Free Childcare

Submitting estimates

Prior to the beginning of each term, childminders are required to submit estimates of weekly funded hours on the Provider Portal this enables an accurate monthly payment to be calculated. An email will be sent by a member of the Early Years Funding Team notifying providers when they must submit estimates.

For all other providers, estimates are based on your headcount figures from the previous year. These can be found on your indicative budget statement, released in March each year, or on your headcount summary for each term on the Provider Portal. PVI providers and maintained schools may be contacted by NYCC and instructed to submit updated estimates using this method, if their numbers appear to be significantly different to the previous year.

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates **Estimates** Actuals Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers:

Provider Headcount Records

Previous | Page: 1 [2](#) | [Next](#) [8 Results]

Estimates	Year	Term	Funding Type
Select	2017/18 Financial Year	Autumn	2 Yr Old Funding
Select	2017/18 Financial Year	Autumn	3 & 4 Yr Old
Select	2017/18 Financial Year	Summer	Ext End After Headcount Adj Sum17
Select	2017/18 Financial Year	Summer	Extended Entitlement
Select	2017/18 Financial Year	Summer	3&4yo After Headcount Adj Sum17

Previous | Page: 1 [2](#) | [Next](#) [8 Results]

Login to the portal, select 'Funding' then 'Estimates' and select the term you wish to submit estimates for.

Synergy FIS Provider Portal

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates **Estimates** Actuals Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers:

Submit Estimate: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [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'

The number of weeks should already be prepopulated on the form, enter the total number of weekly funded hours you are expecting for the term and click 'Calculate'.

Synergy FIS Provider Portal

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates **Estimates** Actuals Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers:

Submit Estimate: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 450.00 Hours in this Term

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

You will see the total of hours in the term appear, this is the number of hours your estimate will be paid on. To submit your estimate select 'Send Claim'.

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates **Estimates** Actuals Adjustments Eligibility Checker

Please select a provider from the dropdown

Manage Providers:

 **Submission Successful**

Submit Estimate: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

Number of Weeks for this Term
 Estimate Number of Funded Hours Per Week for this Term There are 450.00 Hours in this Term
 Please enter both numbers, click 'Calculate', then 'Send Claim'

You should see a 'Submission Successful' banner appear when your claim has been sent.

Repeat this process for all headcounts.

Completing your headcount

The Early Years Funding Team will contact you each term, via email when the headcount is open for you to input your actual headcount –this is usually 2-3 weeks before headcount week.

Each term has a **headcount week**. In our email, we will confirm to you the dates of headcount week and ask that you provide details of any children who are registered and attending during that week. We will also advise you of the deadline your headcount data must be submitted to us by.

Submitting your actual claim details

Select **FUNDING** from the main menu, then **Actuals** from the submenu.

Synergy FIS Provider Portal

Signed in as: **LittleMonsters**
[User Settings](#) | [Sign Out](#)

HOME FORMS **FUNDING** STAFF OFSTED

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers:

Provider Headcount Records

Previous | Page: 1 2 | [Next](#) [7 Results]

	Actuals	Year	Term	Funding Type
Select		2017/18 Financial Year	Autumn	3 & 4 Yr Old
Select		2017/18 Financial Year	Summer	Ext End After Headcount Adj Sum17
Select		2017/18 Financial Year	Summer	Extended Entitlement
Select		2017/18 Financial Year	Summer	3&4yo After Headcount Adj Sum17
Select		2017/18 Financial Year	Summer	2yo After Headcount Adj Sum17

Previous | Page: 1 2 | [Next](#) [7 Results]

1. Select the record you wish to submit a headcount for, please take care to select the correct term and funding type.

Funded children from the previous term will be shown on this screen, but their funded hours will be set to zero – *children who have zero hours will not be allocated funding.*

You must go into each child’s record, check their details and enter the weekly funded hours for Universal and Extended Entitlement hours for the current term.

Any children who are no longer accessing funded hours at your setting will need to be **deleted** from your headcount return.

Deleting a child

To delete a child click on the 

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

Show Stretched Offer Validation Calculation

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	Unchanged	Child, Test (23-Oct-2013)	0.00	0.00	£0.00	D (0.03)	

The following message will appear – click on the [Yes](#)

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Fun Amount for (inc Ad
	Unchanged	Child, Test (23-Oct-2013)	0.00	0.00	

Add Child Send Claim

Request Delete

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

[Yes](#) [No](#)

Adding or updating a child

For an existing child, open the record by clicking on the child’s name. For a new child you should select ‘Add Child’.

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

Show Stretched Offer Validation Calculation

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	Unchanged	Child, Test (23-Oct-2013)	0.00	0.00	£0.00	D (0.03)	

You will see a Summary of the child's funding – this is based on the headcount submission so the totals will be zero until the headcount data has been verified.

Name: Test Child DOB: 23-Oct-2013

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

Term Start Date	01-Sep-2017	Universal Funding	
Term End Date	31-Dec-2017	Funded Hours Per Week	0.00
No of weeks attended	15.00	Funded Hours for Term	0.00
Nominated for DAF			
Provider Total Rate	£3.90	Funding Amount @ Provider Rate	£0.00
Base Rate	£3.90	Child Weightings	£0.00
		Universal Funding Amount	£0.00
		Totals	
		Funded Hours Per Week	0.00
		Funded Hours for Term	0.00
		Total Funding (excl. Adj)	£0.00
		Total amount from Adjustments	£0.00
		Total Funding For Term (inc Adj)	£0.00

Step 1. Select the 'Child Details' tab and complete the information– for existing children, check all details are still correct and amend if appropriate. *Please ensure you enter at least a first line and postcode for each address, this will help the Early Years Funding Team to match them when processing the headcount.*

Step 2. Select the 'Funding Details' tab.

Name: Test Child DOB: 23-Oct-2013

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

Funding Details

Start Date*

End Date*

Weeks Attended in Term*

Present during Census

Attends Two Days or More

Nominated for DAF* Yes No

Stretching Entitlement

Extended Funded Hours per Week

Extended Hours*

30H Eligibility Code

Eligible for 30H

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

Universal Funded Hours per Week

Universal Hours*

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

Total Funded Hours per Week

Total Funded:

er Week

Non-Funded Hours per Week

Non-Funded Hours*

*denotes mandatory fields

Click 'Default Term Dates' and complete the rest of the information under the Funding Details header – mandatory information is marked with a *.

Weeks attended in term – this field should be prepopulated. If you are an Independent School and are not open for the number of funded weeks in term please enter your actual number of weeks and notify the Early Years Funding Team.

Present during Census – this box must be ticked for each child who is present on headcount week.

Attends Two Days or More – if the child takes their hours over more than one day this must be ticked. Please note, the maximum number of hours that can be claimed in one day is 10, you will not be able to save a record with more than 10 hours if this box is not ticked.

Nominated for DAF – use this field to identify children, in receipt of Disability Living Allowance, who have nominated you to claim Disability Access Fund.

Stretching Entitlement – before using this function you must inform the Early Years Funding Team that you are offering stretched funding.

If the child will be accessing Extended hours enter the number of hours and the voucher code. Please note, all codes validity must be confirmed in order to save the record with Extended hours. This is done using the '30 Hours Free Childcare' button after the Parent/Carer details have been entered, please return to this after step 3.

Identify the child's attendance days and complete the universal and non-funded hours per week, please note you must enter 0 if the child does not attend any.

Step 3. Select the 'Parent/Carer Details' tab.

Name: Test Child DOB: 23-Oct-2013

Summary Child Details Funding Details Parent / Carer Details Notes

Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.

Parent / Carer Details		Partner Details	
Forename	<input type="text"/>	Forename	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
DOB	<input type="text"/>	DOB	<input type="text"/>
<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>

Save Cancel *denotes mandatory fields

Enter the parental details on this screen, you can also enter the details of the partner, if applicable. This enables the Early Years Funding Team to check the child's eligibility for EYPP and verify the Extended Entitlement funding if a voucher code has been entered on the previous screen.

Checking the validity of a voucher code

If the child is accessing Extended Entitlement hours, you should now return to the 'Funding Details' tab and click the '30 Hours Free Childcare' button ensuring the voucher code field is complete.

Extended Funded Hours per Week

Extended Hours*

30H Eligibility Code

Eligible for 30H

If the child is eligible you will receive the below message and the 'Eligible for 30H' box will be ticked, you can now save the record.

The screenshot shows the 'FUNDING' section of the system. At the top, there are navigation tabs: HOME, FORMS, FUNDING (highlighted), STAFF, and OFSTED. Below these are sub-tabs: Summary, Termly Funding Dates, Estimates, Actuals (highlighted), Adjustments, and Eligibility Checker. A message box at the top right says 'Please select a provider from the drop down below' with a close button. Below that, 'Manage Providers:' is followed by a dropdown menu showing 'Little Monsters (Day Nursery)'. A large green message box contains the text: 'The Eligibility Code has been found and eligibility for extended hours has been obtained.' Below this, the child's name 'Test Child' and DOB '23-Oct-2013' are displayed. There are tabs for 'Summary', 'Child Details', 'Funding Details' (highlighted), 'Parent / Carer Details', and 'Notes'. The 'Funding Details' section has two input fields: 'Start Date*' with '01-Sep-2017' and 'End Date*' with '31-Dec-2017'. The 'Attendance Days' section has two rows: 'Attends Monday' with radio buttons for 'Yes' and 'No', and 'Attends Tuesday' with radio buttons for 'Yes' and 'No'.

If you enter a code that is not valid you will receive the below message and will not be able to claim Extended hours for the term.

The screenshot shows the same system interface as above. The message box at the top right is the same. The 'Manage Providers:' dropdown is the same. A large red message box contains the text: 'Eligibility for extended hours was not obtained. You will only be able to claim for universal hours.' Below this, the child's name and DOB are the same. The 'Funding Details' section is the same. The 'Attendance Days' section now has three rows: 'Attends Monday', 'Attends Tuesday', and 'Attends Wednesday', each with radio buttons for 'Yes' and 'No'. A 'Default Term Dates' button is visible below the 'End Date' field.

You may have parents who have applied for funding early and received a code for a future term. If you enter a code that is not yet valid you will receive the below message and therefore cannot claim Extended hours for the current term.

The screenshot shows the same system interface as above. The message box at the top right is the same. The 'Manage Providers:' dropdown is the same. A large red message box contains the text: 'The Eligibility Code has been found, but does not cover the standard term start date (01-Sep-2017) therefore extended hours cannot be claimed this term. You may only claim for universal hours.' Below this, the child's name and DOB are the same. The 'Funding Details' section is the same. The 'Attendance Days' section now only has one row: 'Attends Monday' with radio buttons for 'Yes' and 'No'.

To check the validity of voucher codes you must enter all of the following information; a 30 hours voucher code, the child's date of birth and complete the parent/carer details. If some of the

information is missing you will receive the below message and you will be unable to claim Extended hours for the child until the information is provided.

HOME FORMS **FUNDING** STAFF OFSTED

Summary Termly Funding Dates Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Little Monsters (Day Nursery)

ECS Check returned the following error: Please enter a valid Eligibility Code and Child Date of Birth, together with Parent/Carer Details. Please review your entered values and try again.

Name: Test Child DOB: 23-Oct-2013

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

Funding Details

Start Date* 01-Sep-2017

End Date* 31-Dec-2017

Attendance Days

Attends Monday Yes No

Attends Tuesday Yes No

Save

Step 4. Once all information has been input you can now click **Save**. You will then be taken back to the screen listing all children on your headcount. Repeat this process to include all children on your headcount. When all the information has been saved, click 'Send Claim' to submit your headcount return.

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

► Show Stretched Offer Validation Calculation

Not submitted

Add Child Send Claim

Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
⚠ Add Pending	Child, Another (18-Jan-2014)	225.00	225.00	£0.00		21-Aug-2017 - 04-Oct-2017 Grace Period: 26-Oct-2017
↻ Delete Pending, Submitted	Child, Leaver (10-Aug-2013)	0.00	0.00	£0.00	D (0.03)	
⚠ ↻ Edit Pending	Child, Test (23-Oct-2013)	225.00	225.00	£0.00	D (0.03)	20-Aug-2017 - 03-Oct-2017 Grace Period: 25-Oct-2017

Add Child **Send Claim**

Please note, any child records that have been edited but not submitted will have a  in the left and column, all records must be submitted in order for you to receive payment.

The below message will appear to notify you that your submission has been sent successfully and you will see the status of the children change to Add, Edit or Delete Pending, Submitted.



Submission Successful

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

Show Stretched Offer Validation Calculation

Add Child Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
<input type="checkbox"/>	Add Pending, Submitted	Child, Another (18-Jan-2014)	225.00	225.00	£0.00		21-Aug-2017 - 04-Oct-2017 Grace Period: 26-Oct-2017
<input type="checkbox"/>	Delete Pending, Submitted	Child, Leaver (10-Aug-2013)	0.00	0.00	£0.00	D (0.03)	
<input type="checkbox"/>	Edit Pending, Submitted	Child, Test (23-Oct-2013)	225.00	225.00	£0.00	D (0.03)	20-Aug-2017 - 03-Oct-2017 Grace Period: 25-Oct-2017

Add Child Send Claim

You have now successfully submitted your headcount on the Provider Portal. The Early Years Funding team will then process your return and contact you with any queries.

Completing a 2yo headcount

The process for completing your 2 year old headcount is largely the same as your 3&4yo headcount. The differences with the process for your 2yo headcount are listed below:

Submit Actual: 2017/18 Financial Year Autumn - 2 Yr Old Funding [CHANGE](#)

Show Stretched Offer Validation Calculation

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

Funded 2 year old children must have a letter of eligibility from North Yorkshire County Council, this will contain a voucher code. When adding these children, you can use the voucher code by clicking Enter EY Voucher, this will prepopulate some of the information. You do not have to verify the code as you would an extended entitlement child.

Child Details Funding Details Parent / Carer Details Notes

Funding Details		Attendance Days	
Start Date*	<input type="text"/>	Attends Monday	<input type="radio"/> Yes <input type="radio"/> No
End Date*	<input type="text"/>	Attends Tuesday	<input type="radio"/> Yes <input type="radio"/> No
	<input type="button" value="Default Term Dates"/>	Attends Wednesday	<input type="radio"/> Yes <input type="radio"/> No
Weeks Attended in Term*	<input type="text"/>	Attends Thursday	<input type="radio"/> Yes <input type="radio"/> No
Present during Census	<input type="checkbox"/>	Attends Friday	<input type="radio"/> Yes <input type="radio"/> No
Attends Two Days or More	<input type="checkbox"/>	Attends Saturday	<input type="radio"/> Yes <input type="radio"/> No
Stretching Entitlement	<input type="checkbox"/>	Attends Sunday	<input type="radio"/> Yes <input type="radio"/> No
Universal Funded Hours per Week		Non-Funded Hours per Week	
Universal Hours*	<input type="text"/>	Non-Funded Hours*	<input type="text"/>

*denotes mandatory fields

Funded 2 year old children are not eligible for Extended Entitlement hours, therefore you will only see a field for Universal Hours.

Checking your headcount

The Early Years Funding Team will notify all providers when the headcount checking and verification process is complete and give you a deadline date to check the information. As part of this process, the details or number of hours for some children may change, it is your responsibility to check that any changes that have been made are correct. You will therefore be required to go into each of your headcount submissions and check the details and number of hours for each child is correct.

Step 1. Open your headcount.



Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

You will see the status of each child is Unchanged and the Total Funding Amount for Term will appear. If any children have their status as Pending they may not have been submitted and you will not receive payment for them. To include these records you must click Send Claim and contact The Early Years Funding Team to inform them of the submission.

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

▶ Show Stretched Offer Validation Calculation

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

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
<input checked="" type="checkbox"/>	Unchanged	Child, Another (18-Jan-2014)	225.00	225.00	£1768.50	D (0.03)	23-Aug-2017 - 06-Oct-2017 Grace Period: 28-Oct-2017
<input checked="" type="checkbox"/>	Unchanged	Child, Test (23-Oct-2013)	225.00	225.00	£1768.50	D (0.03)	23-Aug-2017 - 06-Oct-2017 Grace Period: 28-Oct-2017

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

You will also be able to see the dates that the voucher code is valid and the grace period end date, in the Eligibility Status for each child. This enables you to notify parents when their code will expire, to ensure they reconfirm their eligibility in time for the following term. The Grace Period is the date the child is eligible for funding until, when a recheck is performed this date will be amended. Please note, the grace period will always be until the end of a full term.

Step 2. Open each child record and check the information on the Child Details, Funding Details and Parent/Carer Details tabs. If there are any amendments to be made please edit the information and click [Save](#).

If there are no changes to be made click **Cancel**. Do not click the **Save** button if no changes have been made, this will mean the system will think you have unsubmitted headcount records. If you accidentally save an unchanged record you will see the status change to Edit Pending. You can cancel this by clicking the , you will see a message asking if you want to undo your changes, click **Yes**. The status of the child will return to Unchanged.

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

▶ Show Stretched Offer Validation Calculation

ⓘ Not submitted

Add Child **Send Claim**

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
ⓘ	 Edit Pending	Child, Another (18-Jan-2014)	225.00	225.00	£1768.50	D (0.03)	23-Aug-2017 - 06-Oct-2017 Grace Period: 28-Oct-2017
	 Unchanged	Child, Test (23-Oct-2013)	225.00	225.00	£1768.50	D (0.03)	23-Aug-2017 - 06-Oct-2017 Grace Period: 28-Oct-2017

Submit Actual: 2017/18 Financial Year Autumn - 3 & 4 Yr Old [CHANGE](#)

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Confirm Undo

Are you sure you want to undo your pending changes for child: Child, Another?

Yes **No**

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Step 3. If any changes have been made you must click **Send Claim** and contact the Early Years Funding Team to inform them of the alteration. Any changes made will not be accepted if the team has not been contacted by telephone.

Viewing your payment summary

On the Summary tab you will see the total amount of funding you are due for the term under the Actuals heading. This information will appear when NYCC have verified your headcount.

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.

Estimates	
Term Length (Weeks)	15.00
▸ Provider Rate applied	£3.90
Estimate Funding	
Hours Per Week	0.00
Term Funding Amount	£0.00
Interim %	100.00%
Interim Amount Payable	£0.00
<hr/>	
Total Interim Amount Paid to Date (before Adj)	£0.00
<hr/>	
Interim Amount Payable Balance	£0.00

Processed No
Processed Date

Actuals	
Term Length (Weeks)	15.00
▸ Provider Rate applied to child funding	£3.90
Universal Funding	
Funded Hours for Term	450.00
Funding Amount @ Provider Rate	£1755.00
▸ Child Weightings Total	£13.50
<hr/>	
Universal Funding Amount	£1768.50
Extended Funding	
Funded Hours for Term	450.00
Funding Amount @ Provider Rate	£1755.00
▸ Child Weightings Total	£13.50
<hr/>	
Extended Funding Amount	£1768.50
Totals	
Funded Hours for Term	900.00
Funding Amount @ Provider Rate	£3510.00
Child Weightings	£27.00
<hr/>	
Term Funding Amount	£3537.00
Interim Amount Paid (before Adj)	£0.00
<hr/>	
Term Funding Amount Balance	£3537.00
Adjustments Paid with Final Payment	£0.00
<hr/>	
Actual Amount Paid (Inc. Adj)	£0.00

Frequently Asked Questions

Access to systems and passwords

What do I do if I forget my username or password?

You request a password reset by contacting the Families Information Service on 01609 533483.

Will each member of staff that will use the system have their own login?

Each provider is given only one username and password, this can be shared with any members of staff who will be responsible for accessing the portal.

How do I change my password?

You can change your password by logging in to the provider portal and following the changing your password procedure on page 3 of this guidance.

What if a member of staff leaves who has access to the online system and knows the password?

You should change the password immediately to ensure only authorised members of staff and management have access to the system. If you do not have the login details, you should contact the Families Information Service on 01609 533483.

Data quality

Who is responsible for the quality and accuracy of the child data entered into the online system?

The person entering and checking the data is responsible for the accuracy of information. Please ensure that you have the child's full details, including full name, address including postcode and legal surname. It is good practice to use the information on the Parental Agreement form when inputting your headcount to ensure the information you are providing is accurate.

Funding and claim details

Do I need to submit a funding estimate online every term?

Childminders are asked to submit an estimate to ensure accurate funding is given each term. PVI providers and maintained schools should only submit an estimate if they are required to do so. Payments are based on the previous year's term funded hours, these are shown on the indicative budget statement that is sent to all providers in March of each year.

What figure should I enter for weeks attended in term on the Provider Portal?

The number of weeks per term will be prepopulated on each child's record, this should only be changed if the child is accessing a stretched offer. The number of weeks per term for providers open for less than 38 weeks per year will be amended by the Early Years Funding team.

What do I do if a funded child leaves after headcount week?

For PVI providers or maintained nursery classes, if a child leaves your setting, you do not have to notify us of this change. We also will not reclaim the funding paid to you. Childminders must notify the Early Years Funding Team who will adjust the funding claim.

Can I make a claim for a child who joins us after headcount week?

For PVI providers or maintained nursery classes, if a child joins you after headcount week, and has never been funded by North Yorkshire, you need to contact the Early Years Funding team to discuss the process for an After Headcount Adjustment. You will then receive funding for the child from the first week they attend for their full hours, for the remainder of the term. This payment will be made to you when all data has been finalised.

If a child joins you after headcount week, and has been previously funded by North Yorkshire, you should offer the place but cannot claim for them until the next term. If you do not have any spaces at your provision, you are not obliged to give a funded place as you must ensure that you stay in your child/staff ratios.

Childminders are allowed to claim for children who begin funding after headcount week, regardless if they have been previously funded in North Yorkshire or not.

What do I do if a child leaves before headcount week?

You must not add the child to your headcount data, and you will not receive any funding for this child for the period they have attended, you should not charge the parent for these sessions.

Will the online system give me a warning if another provider has claimed for a child?

No, if there is an over claim of hours between two providers, a member of the Early Years Funding Team will be in touch to resolve this issue. It is important that you discuss the funding with the parents so that they understand the funding and ensure that the Parental Agreement form is filled in accurately as this will highlight if they are attending another provider.

Parental Agreements

Do Parental Agreement Forms have to be in place for all funded children?

Yes, Parental Agreement Forms should be completed and signed by the parents when a child first claims a funded place with your setting. It is important to amend the Parental Agreement if

there are any changes in the funding or child details in a term and ask the parent to sign and date the agreement.

Why do we have Parental Agreement forms?

The Statutory Guidance for Local Authorities states that local authorities should support providers to establish Parental Agreement forms. These should set out the hours and pattern of attendance for Early Years funded hours. The agreement is your contract with the parent, allowing you to claim funding on their behalf. If there were any disputes regarding funded hours for a child, North Yorkshire County Council would look to the Parental Agreement in the first instance. NYCC may visit your setting to audit your claim information. They will therefore expect to see Parental Agreement forms and all other paperwork pertaining to the funded early education places.

How long do we have to keep Parental Agreements Forms?

We advise that providers keep declarations for the current year plus 4.

Contact information

North Yorkshire County Council
Early Years Funding Team
The Village
County Hall
Racecourse Lane
Northallerton
DL7 8AD

Tel: 01609 532391/01609 532393

Email: eyft@northyorks.gov.uk

HMRC 30 hour voucher code queries

Customer Contact Centre: 0300 123 4097