

GUIDANCE FOR SYNERGY PROVIDER PORTAL ONLINE ADJUSTMENT PROCESS

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Table of Contents

Introduction	2
Adjustment Tab	2
How to enter an Adjustment	5
How to add a NEW child to Adjustments:	5
How to Change an Existing Claim	10
Reducing Hours for an Overclaim	13
Rejected Claims	16
Paid Adjustments	20
Updating Existing Funding records for DAF and EYPP	20
DAF (Disability Access Fund)	20
EYPP	23
2 Year Funding	24
To enter an Adjustment for 2 year funding:	24
To add a new child missed off the Headcount or starting after the Headcount:	25
Changes to an existing Claim:	29
Unsubmitted Claims	31

Introduction

The **online adjustment process** replaced the Adjustment Form, emailed on a termly basis from the Spring term 2022. The Online Adjustments process must be used to make any changes to your funding claim after the Headcount submission period has closed.

The **online adjustments process** must be used for:

Corrections to your Headcount:

- Children who should have been deleted from your Headcount
- Children missed off the Headcount claim
- Incorrect hours entered on your Headcount claim

Specified categories where adjustments can be made after the Headcount

- A house move into the area for the child or parent
- If the child's primary carer changes resulting in the need to change setting
- Where a sibling moves school and the child needs to move to attend adjacent/nearby nursery provision
- Military family posted in / out of the area
- Child protection and safeguarding reasons
- Where the child has not previously taken up a place and is a new starter eligible for funding
- Family requirements change and funded hours need to be increased e.g a change in working patterns

Note: Where a child has moved settings within Warwickshire before or after Headcount and funding has been claimed at another provider, a request must be made directly to the child's previous setting to transfer funding.

Please refer to Section 2.6, page 28 of the Guidance and Requirements of Early Education Funding for 2, 3 & 4 year olds for details of the adjustment criteria:

<https://api.warwickshire.gov.uk/documents/WCCC-505288705-92>

Adjustment Tab

The Adjustments tab is accessed using the Synergy Provider Portal. Sign into the Provider Portal as usual: <https://admissions.warwickshire.gov.uk/synergy/providers>

- Select the **Funding** tab:
- Select the **Adjustments** option:
- Select the correct **Year and Term**:

Select Year and Term

2021/2022

Autumn Term

Submission Period:
 01-Nov-2021 to 03-Dec-2021

- The Adjustments tab will be opened to enter changes to your Headcount after the Headcount Submission end date has passed, the date will be shown in the Termly Information letter.
- The Adjustments **Ready to Process** status will show differently depending on the point that the Funding Office has reached with processing the Headcount claims.
- If the Funding Office have **not** paid the Actual or final payment, the adjustment may be paid with your Actual payment.
- If the adjustment is added **after** the Actual or final payment has been paid it will be paid as a separate payment at the end of term.
- The **Actuals** column will indicate the stage of the funding process by which column has been ticked:

Home Forms Funding Sufficiency
 Summary Estimates Actuals Adjustments Eligibility Checker

Adjustments Head Count Records for 2021/2022 - Autumn Term

2021/2022		Actuals (Office use only)		
Autumn Term		Ready To Process	Processed	Editable
Submission Period: 01-Nov-2021 to 03-Dec-2021				
2020/2021	2 Year Olds	✓		
2019/2020	3 & 4 Year Olds 3			
2018/2019				
2017/2018				

If the Actual or final payments have not been paid:

- There will **not** be a tick in the **Ready to Process** column
- A **pen** symbol will show next to the **Funding Type**,
- Adjustments can be added.
- Any adjustments added now will be paid with the Final payment.

The Actual or final payments are at **Ready to Pay**:

- A tick will be seen the **Ready to Process**, the Headcount final payments have been calculated and have been frozen and no further changes can be made.
- Adjustments **cannot** be added during this period.
- A **book** symbol will show next to the **Funding Type** this means it is read only.
- Wait until the symbol is showing as a **pen** again to add any adjustments. Check again in a few days.

Home Forms		Funding	Sufficiency
Summary Estimates Actuals Adjustments Eligibility Checker			
Adjustments Head Count Records for 2021/2022 - Autumn Term			
2021/2022	Actuals (Office use only)		
Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021	Funding Type	Ready To Process	Processed
2020/2021	# Year Olds	✓	
2019/2020	✎ 3 & 4 Year Olds 3		
2018/2019			
2017/2018			

If you select the Adjustment option whilst the 'Ready to Process' column is ticked, the following page will appear:

Home Forms		Funding	Sufficiency
Summary Estimates Actuals Adjustments Eligibility Checker			
<p>To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.</p> <p>To add a new child, click on the add child box below and complete all the details in every tab and click save.</p> <p>When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.</p>			
View Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE			
Please email the Authority to request changes to the adjustments.			

Check the Provider Portal again after a few days for a tick to appear in the **Processed** column.

When the Actual or final payments have been put to 'Paid':

- a tick will show in the **Ready to Process** column and in the **Processed** column.
- The **pen** symbol will show next to the **Funding Type**.
- Adjustments can be entered from now and until the deadline date.
- Any adjustments added now will be paid separately as an Adjustments Payment at the end of the term.

Home Forms		Funding	Sufficiency
Summary Estimates Actuals Adjustments Eligibility Checker			
Adjustments Head Count Records for 2021/2022 - Autumn Term			
2021/2022	Actuals (Office use only)		
Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021	Funding Type	Ready To Process	Processed
	✎ 2 Year Olds	✓	✓
	✎ 3 & 4 Year Olds 3	✓	✓

Note: When the payments have been put to Paid this date will show in your Actuals as the date the payment has been made. This may not correspond to the Final Payment date notified in the Termly Information Letter due to the timescales of processing the payments in WCC's financial system.

How to enter an Adjustment

- Select the available **Funding Type** the adjustment is to be made for:

Organisation: Tribal Test
Provider: Tribal Test (Day Nursery) ▼

Home Forms Funding Sufficiency
Summary Estimates Actuals Adjustments Eligibility Checker

Adjustments Head Count Records for 2021/2022 - Autumn Term

2021/2022		Actuals (Office use only)		
Autumn Term		Ready To Process	Processed	Editable
Submission Period: 01-Nov-2021 to 03-Dec-2021				
	Funding Type			
	2 Year Olds	✓		
	3 & 4 Year Olds	✓	✓	

The **Adjustments** page will be displayed and will show the same information as your Headcount Actuals page.

Organisation: Tribal Test
Provider: Tribal Test (Day Nursery) ▼

Home Forms Funding Sufficiency
Summary Estimates Actuals Adjustments Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE ↕

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£871.50	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	Wicks, Joe (05-Nov-2017)	0.00	0.00	168.00	0.00	£697.20	

Add Child Send Claim

How to add a NEW child to Adjustments:

This process is used to add a child that has been missed from the Headcount or a new child that has started after the Headcount period for a permitted reason, who has **not** been funded elsewhere for the term.

- Select Add Child:

Add Child Send Claim

- Add the details of the child in the same way as you would enter them on the Headcount:
- Select each tab in turn and fully complete **all** boxes.
- Do not select Save until all tabs have been completed.

Child Details tab:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

Child Details

Forename*

Middle Name

Surname*

DOB*

Proof of DOB

Gender* Male Female

Preferred Surname

Ethnicity*

SEN COP Stage

Address

Address Line 1*

Address Line 2

Address Line 3

Locality

Town

County

Postcode*

Save Cancel *denotes mandatory fields

Parent/Carer Details tab:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Pending Adjustment 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 extended 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.

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

Parent / Carer Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Partner Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Save Cancel *denotes mandatory fields

Funding Details tab:

As the Headcount submission date has passed not all boxes will be available, some boxes will be 'greyed out' as highlighted in yellow below and cannot be changed.

The fields ringed can be changed:

- Start and end dates
- Nominated for DAF
- 30 hour code details can be changed as required. When you enter a 30 hour code you MUST also click on the blue box '30 Hours Free Childcare' below it.

Child Details | Parent / Carer Details | **Funding Details** | Documents | Pending Adjustment | Notes

Funding Details

Start Date* 01-Nov-2021
 End Date* 17-Dec-2021
 Default Term Dates

Weeks Attended in Term* 0.00

Present during Census
 Attends Two Days or More

Nominated for DAF* Yes No

Universal Funded Hours per Week
 Universal Hours* 0.00

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: 0.00

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* 0.00

ⓘ 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

Maximum Values Allowed:

Number of Weeks: **14.00**
 Universal Weekly Hours: **15**
 Universal Termly Hours: **210**
 Universal Yearly Hours: **570**
 Extended Weekly Hours: **15**
 Extended Termly Hours: **210**
 Extended Yearly Hours: **570**

Save Cancel *denotes mandatory fields

Documents tab:

If you have ticked **Yes** for **Nominated for DAF**, you will need to add the supporting DLA Award letter to the **Document** tab.

This should also be used to add supporting information for an EYPP claim that is not for economic reasons e.g. Adoption Birth Certificate

Name: Michael George DOB: 25-Dec-2017

Summary | Child Details | Parent / Carer Details | Funding Details | **Documents** | Pending Adjustment | 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 999 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel *denotes mandatory fields

Pending Adjustment tab:

Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.

Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90

To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment
Number of Hours [dropdown] [input field]
Reason (500 characters) [text area]

Maximum Values Allowed:
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00

Extended Pending Adjustment
Number of Hours [dropdown] [input field]
Reason (500 characters) [text area]

Maximum Values Allowed:
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

Following the instructions in the Blue box:

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.

Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90

To add hours select More Hours
To remove hours select Less Hours

- Enter the hours that you want to claim for the term in the **Universal Pending Adjustment** boxes
- If Extended hours are to be entered using the 30 hour code enter the details in the **Extended Pending Adjustment** boxes

How to calculate the number of hours to enter:

Number of Hours = number of weeks you are claiming for, multiplied by the number of hours the child is attending per week.

Enter the total in the second box:

Universal Pending Adjustment
Number of Hours [dropdown] [input field]
Reason (500 characters) [text area]

Extended Pending Adjustment
Number of Hours [dropdown] [input field]
Reason (500 characters) [text area]

Example:

If a child was missed off the Headcount:

Multiply the number hours you are claiming per week e.g 15 hours by the number of weeks attending in that term, e.g. 14 weeks (Autumn term)

15 hours x 14 weeks = 210 hours to enter for the term

Note: The total hours must be entered NOT the weekly hours

- When hours are to be added, select the **More Hours** from the drop down box:

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

- Complete the **Reason** box.

Reason Box

The **Reason Box MUST** be fully completed with:

- The reason for the adjustment, refer to page2 or Section 2.6 of the Guidance and Requirement of Funding for the permitted adjustments reasons
- How the hours were calculated:

Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

Child missed off the Headcount
attending 15 hours per week for the 14 weeks of term
15 x 14 = 210 hours added

Extended Pending Adjustment

Number of Hours

Reason (500 characters)

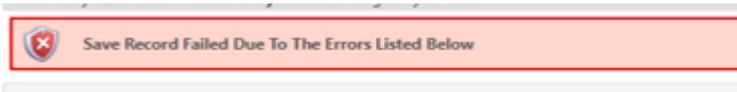
Maximum Values Allowed:
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00

Maximum Values Allowed:
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

*denotes mandatory fields

NOTE: If the reason box is not completed, it will not allow the adjustment to be saved:

The following errors messages will be shown



The following errors need to be fixed before the record can be saved:
Reason must be entered, as some details have been entered (Pending Adjustment Tab)

If the Reason box has not been completed with a permitted Adjustment as listed on page 2 or from section 2.6 of the Guidance and Requirements of Funding, your adjustment claim may be rejected. **Refer to the section on Rejected Claims on page 16 below.**

Click on Save:

When everything has been completed select the **Save** box and it will ~~be~~ return to the first page



The **Status** of the child added will show as **New Unsubmitted Claim:**

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
New, Unsubmitted Child	George, Michael (25-Dec-2017)	105.00	0.00	105.00	0.00	£435.75	
	Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£871.50	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	Wicks, Joe (05-Nov-2017)	0.00	0.00	168.00	0.00	£697.20	

Add Child Send Claim

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How to Change an Existing Claim

This process is used for incorrect hours added at Headcount or a change to the hours claimed after Headcount:

Example: Increased hours after Headcount (Autumn Term 14 weeks)

A claim has been added for a child at Headcount for 12 hours per week, 168 hours for the term (12 x 14 weeks = 168 hours).

The claim needs to be changed to 15 hours per week after the Headcount as the parent has changed their working patterns

- Select the child from the list and double click on their name

(05-Nov-2017)	0.00	0.00	168.00	0.00	£697.20
Wicks, Joe (05-Nov-2017)					

It will automatically go to the **Pending Adjustment** tab

- Select the **Funding Details** tab to check the details of the Headcount claim first, before entering the adjustment. The hours cannot be changed here as they are 'greyed out':

Name: Joe Wicks DOB: 05-Nov-2017

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

Funding Details

Start Date* 02-Sep-2021
End Date* 17-Dec-2021
Default Term Dates

Weeks Attended in Term* 14.00

Present during Census
Attends Two Days or More
Nominated for DAF* Yes No

Universal Funded Hours per Week

Universal Hours* 12.00

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: 12.00

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* 0.00

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

Maximum Values Allowed:

Number of Weeks: 14.00
Universal Weekly Hours: 15.00
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00
Extended Weekly Hours: 15.00
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

Note: If you are adding new **Extended hours** to the claim, you would need to select the **Parent Carer** tab and enter the parent's details

Home Forms Funding **Sufficiency**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name: Joe Wicks DOB: 05-Nov-2017

Summary Child Details **Parent / Carer Details** Funding Details Documents Pending Adjustment 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 extended 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.

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

Parent / Carer Details

Forename
Surname
DOB
 NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Partner Details

Forename
Surname
DOB
 NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Save Cancel *denotes mandatory fields

and

then click on the **Funding Details** tab and enter the 30 hour code details, remembering to click on the **30 Hours Free Childcare** box **before** entering the hours on the **Pending Adjustment** tab

Name: Joe Wicks DOB: 05-Nov-2017

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

Funding Details

Start Date* 02-Sep-2021
End Date* 17-Dec-2021
Default Term Dates

Weeks Attended in Term* 14.00

Present during Census
Attends Two Days or More
Nominated for DAF* Yes No

Universal Funded Hours per Week
Universal Hours* 12.00

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: 12.00

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* 0.00

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

Maximum Values Allowed:
Number of Weeks: 14.00
Universal Weekly Hours: 15.00
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00
Extended Weekly Hours: 15.00
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

- Select **Pending Adjustment** tab

Name: Joe Wicks DOB: 05-Nov-2017

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

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment
Number of Hours
Reason (500 characters)

Extended Pending Adjustment
Number of Hours
Reason (500 characters)

Maximum Values Allowed:
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00

Maximum Values Allowed:
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

- Enter the total number of hours the adjustment is for:

Example: this is an increase of 3 hours per week for 7 weeks - the remaining number of weeks in the term from the start date of the change (not including school holidays).

3 hours x 7 weeks = 21 hours

- Select **More Hours** from the drop down box
- Enter the total hours to claim
- Enter the reason

Name: Joe Wicks DOB: 05-Nov-2017

Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment
Number of Hours: **More Hours**
Reason (500 characters): Increase of hours following a change to parent's work pattern
3 additional hours per week from 1.11.2021, 7 weeks = 21 hours

Extended Pending Adjustment
Number of Hours:
Reason (500 characters):

Maximum Values Allowed:
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00

Maximum Values Allowed:
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

Reducing Hours for an Overclaim

If the adjustment is being added because of an overclaim of hours i.e. too many hours per week had been added at Headcount in error:

Example:

The claim should have been for 9 hours per week and not for the 12 hours entered

Overclaim of 3 hours per week for 14 weeks

3 hours x 14 weeks = 42 hours

- Double click on the child's name
- The Pending Adjustment tab will automatically be selected
- View the details entered on the Funding Details tab, see page 11 above
- Return to the Pending Adjustments tab
- Select **Less Hours**
- Enter the total overclaim of hours for the term
- Enter the **Reason**

? Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment

Number of Hours

Reason (500 characters)
Incorrect hours added at Headcount, should be 9 hours per week
Overclaim of 3 hours per week x 14 weeks = 42 hours

Maximum Values Allowed:
Universal Termly Hours: 210.00
Universal Yearly Hours: 570.00

Extended Pending Adjustment

Number of Hours

Reason (500 characters)

Maximum Values Allowed:
Extended Termly Hours: 210.00
Extended Yearly Hours: 570.00

Save Cancel

*denotes mandatory fields

Note: You do not need to enter an adjustment if the hours are decreasing after Headcount. Hours are paid for the whole term based on the child's attendance at Headcount.

- When the Adjustment has been fully completed, click on **Save**
- It will automatically return to the first page.

The adjustments entered will show as **Unsubmitted Claim**:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
 To add a new child, click on the add child box below and complete all the details in every tab and click save.
 When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
New, Unsubmitted Child	George, Michael (25-Dec-2017)	105.00	0.00	105.00	0.00	£435.75	
	Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£871.50	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
Unsubmitted Claim	Wicks, Joe (05-Nov-2017)	21.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

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- When all the Adjustments have been entered, click on the **Send Claim** box.
- The green confirmation box will appear, the **Status** of the Adjustments will change to **Awaiting LA Download**

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Submission Successful

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
 To add a new child, click on the add child box below and complete all the details in every tab and click save.
 When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE

▶ Not Paid - Total: £1747.85

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	George, Michael (25-Dec-2017)	0.00	0.00	105.00	0.00	£435.75	
	Hope, Holly (02-Feb-2018)	0.00	0.00	168.00	0.00	£1312.20	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	Swift, Taylor (05-Aug-2018)	0.00	0.00	210.00	0.00	£871.50	
Awaiting LA Download	Wicks, Joe (05-Nov-2017)	21.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

The number of hours will show in the **Pending Adjustment** columns and the adjustment amount will show as **Not Paid**:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Submission Successful

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE

▶ Not Paid - Total: £1747.95

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	George, Michael (25-Dec-2017)	0.00	0.00	105.00	0.00	£435.75	
	Hope, Holly (02-Feb-2018)	0.00	0.00	168.00	0.00	£1312.20	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	Swift, Taylor (05-Aug-2018)	0.00	0.00	210.00	0.00	£871.50	
ⓘ ⌛ Awaiting LA Download	Wicks, Joe (05-Nov-2017)	21.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

When the Funding Office has accepted the Adjustments, the **Status** column will be blank:

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE

▶ Not Paid - Total: £1835.10

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	George, Michael (25-Dec-2017)	0.00	0.00	105.00	0.00	£435.75	
	Hope, Holly (02-Feb-2018)	0.00	0.00	168.00	0.00	£1312.20	
	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	Swift, Taylor (05-Aug-2018)	0.00	0.00	210.00	0.00	£871.50	
	Wicks, Joe (05-Nov-2017)	0.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

Rejected Claims

If an adjustment claim cannot be accepted by the funding office because:

- The reason was not entered
- It does not meet the permitted reason criteria
- The adjustment exceeds the maximum hours available for the term due to another claim being made for the child
- The claim has not been calculated correctly

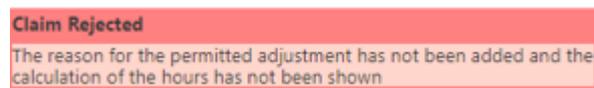
The adjustment claim will be **rejected**.

It is recommended that you check your adjustment claims on or before the submission deadline date to verify that your adjustment has been accepted.

If a claim has been rejected an exclamation mark will show next to the child's name and 'Claim Rejected':



The reason for the rejection will be stated in the child's **Summary tab**.



If possible the rejected adjustment will need to be corrected, then Save and Send the claim again.

EXAMPLE

A screenshot of a web form titled 'Pending Adjustment' with tabs for Summary, Child Details, Parent / Carer Details, Funding Details, Documents, Pending Adjustment, and Notes. The form contains a light blue instruction box, two adjustment sections (Universal and Extended Pending Adjustment), and maximum values allowed. At the bottom are Save and Cancel buttons and a note that an asterisk denotes mandatory fields.

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment
Number of Hours More Hours
Reason (500 characters)
Added another session

Extended Pending Adjustment
Number of Hours
Reason (500 characters)

Maximum Values Allowed:
Universal Termly Hours: 165.00
Universal Yearly Hours: 570.00

Maximum Values Allowed:
Extended Termly Hours: 165.00
Extended Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

In the example above, the permitted reason for the adjustment and the calculation have not been entered in the Reason box.

The claim has been rejected by the Funding Office, it will show in the list of children as 'Claim Rejected'

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	Bank, Mark (22-Mar-2018)	0.00	0.00	165.00	0.00	£1387.20	
Claim Rejected	John, Smythe (05-Sep-2018)	10.00	0.00	157.00	0.00	£651.55	

Select the child by clicking on the name.

The reason for the rejection will show on the Summary page

Name: Smythe John DOB: 05-Sep-2018

Summary | Child Details | Parent / Carer Details | Funding Details | Documents | Pending Adjustment | Notes

Term Start Date	04-Jan-2022	Universal Funding Funded Hours Per Week Funded Hours for Term
Term End Date	08-Apr-2022	
No of weeks attended	11.00	
Nominated for DAF	No	
Provider Total Rate	£4.15	Funding Amount @ Provider Rate Child Weightings
Claim Rejected The reason for the permitted adjustment has not been added and the calculation of the hours has not been shown		Universal Funding Amount
		Totals Funded Hours Per Week Funded Hours for Term Total Funding (excl. Adj) Total amount from Adjustments Total amount from Pending Adjustments
		Total Funding For Term (inc Adj)

Save **Cancel** *denotes mandatory fields

Update the claim with the required information and re-send the claim.

Name: Smythe John DOB: 05-Sep-2018

Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

? Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
 The number of funded weeks for the term and term dates are found on the Home page.
 Example:
 Number of weekly hours to add/deduct = 15
 Number of weeks from the adjustment start date to the end of the term = 6
 Number of Hours to enter 15 x 6 = 90
 To add hours select More Hours
 To remove hours select Less Hours

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

More hours added

5 weeks x 2 hours

Change in parent's working schedule

Maximum Values Allowed:
Universal Termly Hours: 165.00

Extended Pending Adjustment

Number of Hours

Reason (500 characters)

Maximum Values Allowed:
Extended Termly Hours: 165.00

If the claim is not updated a red circle with an exclamation mark will also show next to the child's name in the **Actuals** list:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

View Actuals: 2021/2022 Spring Term - 3 & 4 Year Olds 3 CHANGE

	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weighting
	Bank, Mark (22-Mar-2018)	165.00	0.00	£1387.20	EYPP
!	John, Smythe (05-Sep-2018)	157.00	0.00	£651.55	
	Light, Lucy	110.00	0.00	£514.00	DF

When you click on the child's name a message will be displayed:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

! Adjustments cannot be added, due to the status being 'Adjustments Claim Rejected'. Please correct and Re-Send the Claim.

Name: Smythe John DOB: 05-Sep-2018

Summary Child Details Parent / Carer Details Funding Details Documents Notes

Term Start Date 04-Jan-2022
Term End Date 08-Apr-2022
No of weeks attended 11.00
Nominated for DAF No

▶ **Provider Total Rate** £4.15

Claim Rejected
 The reason for the permitted adjustment has not been added and the calculation of the hours has not been shown

Universal Funding
 Funded Hours Per Week
 Funded Hours for Term

Funding Amount @ Provider Rate
Child Weightings

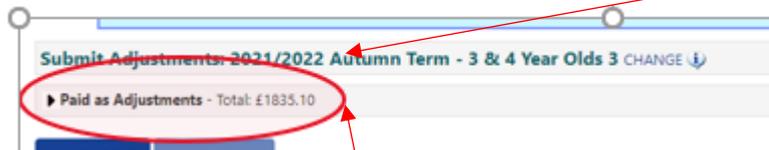
Universal Funding Amount

Totals
 Funded Hours Per Week
 Funded Hours for Term
Total Funding (excl. Adj)
 Total amount from Adjustments
 Total amount from Pending Adjustments

Total Funding For Term (inc Adj)

Paid Adjustments

After the Funding Office has made the Adjustment payment it will show as **Paid as Adjustments**:



Paid or Not Paid bar

By clicking in the **Paid or Not Paid as Adjustments** bar it will show a breakdown of the Adjustments made:

Examples:

▼ Paid as Adjustments - Total: £1747.95, Paid Date: 09-Dec-2021									
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	01-Dec-2021	Swift Taylor	05-Aug-2018	210.00		£0.00	£871.50	£871.50	Missed off headcount claim attending 15 hours per week for 14 weeks, 210 funded hours requested
Child	01-Dec-2021	George Michael	25-Dec-2017	105.00		£0.00	£435.75	£435.75	New starter, new to funding.
Child	02-Dec-2021	Hope Holly	02-Feb-2018	-42.00		£0.00	(£174.30)	(£174.30)	Incorrect hours entered on the Headcount claim 15 hours claimed but the claim should have been for 12 hours difference of 3 hours per week x 14 weeks = 42 hours overclaimed
Child	01-Dec-2021	Hope Holly	02-Feb-2018					£615.00	System generated adjustment for [DAF].

▼ Not Paid - Total: £87.15										
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	09-Dec-2021	Wicks Joe	05-Nov-2017	21.00			£0.00	£87.15	£87.15	Increase of hours f

Updating Existing Funding records for DAF and EYPP

DAF (Disability Access Fund)

If you have a child who is in receipt of DLA, Disability Living Allowance, you should be claiming **DAF** for them.

DAF will be paid where the **Nominated for DAF** button is ticked Yes **AND** when evidence of entitlement, in the form of a DLA award letter, has been sent to the Funding Office.

The evidence must be sent using the **Documents** tab. If this was missed from the Headcount or the child is newly eligible it should be added to the Adjustments:

- Select the child from your list by double clicking on their name:

Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£871.50
------------------------------	------	------	--------	------	---------

- You will automatically be taken to the **Pending Adjustment** tab.
- You will **not** need to add anything to this tab unless changes are also being made to the funded hours
- Select the **Funding Details** tab
- Click on the **Yes** button for **Nominated for DAF**

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name: Holly Hope DOB: 02-Feb-2018

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

Funding Details

Start Date* 02-Sep-2021

End Date* 17-Dec-2021

Default Term Dates

Weeks Attended in Term* 14.00

Present during Census

Attends Two Days or More

Nominated for DAF* Yes No

Universal Funded Hours per Week

Universal Hours* 15.00

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* 0.00

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

Maximum Values Allowed:

Number of Weeks: **14.00**

Universal Weekly Hours: **15**

Universal Termly Hours: **210**

Universal Yearly Hours: **570**

Extended Weekly Hours: **15**

Extended Termly Hours: **210**

Extended Yearly Hours: **570**

Select the **Documents** tab:

Upload a copy of the DLA award letter

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name: Holly Hope DOB: 02-Feb-2018

Summary Child Details Parent / Carer Details Funding Details **Documents** Pending Adjustment 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 999 MB.

Description*	File Name	Upload a file
DLA Award letter	DLA.docx	Delete

Save Cancel *denotes mandatory fields

Select the **Notes** Tab

Enter a note, example below:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name: **Holly Hope** DOB: **02-Feb-2018**

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

Add a new note

Eligible for DAF, DLA award letter added

Notes History

No Historical Notes

Save Cancel *denotes mandatory fields

Click on **Save**

The child will have the **Status** of **Unsubmitted Claim** and a **paperclip** symbol will show.

Continue with adding further adjustment process as shown on pages 15 -17.

Once the DAF claim has been accepted by the LA the DAF payment of £615 will show in the **Total funding amount for Term (inc Adj)**

Submit Adjustments: 2021/2022 Autumn Term - 3 & 4 Year Olds 3 CHANGE ↓

Add Child Send Claim

Status	Child	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
New, Unsubmitted Child	George, Michael (25-Dec-2017)	105.00	0.00	105.00	0.00	£435.75	
Unsubmitted Claim	Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£871.50	
Unsubmitted Claim	Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
Unsubmitted Claim	Wicks, Joe (05-Nov-2017)	21.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

EYPP

EYPP not added at Headcount

If EYPP was not added at Headcount, providers will need to add this as an adjustment by using the process below:

- Select the child double click on the name
- Select the **Parent/Carer Details** tab
- Complete all details
- Tick to give consent to Eligibility Check by ticking the **EYPP** box
- Add a note to the **Notes** tab
- Select Save

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Pending Adjustment 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 extended 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.

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

Parent / Carer Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Partner Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Save Cancel *denotes mandatory fields

The EYPP adjustment will show as an Unsubmitted Claim until it has been accepted by the Funding Office.

If EYPP is added as an Adjustment, it will show in the Weightings column in the Adjustments breakdown by clicking the **Adjustments Paid or Not Paid** bar, see page 17.

EYPP claimed at Headcount but not added:

If you were expecting EYPP to have been added at the Headcount but it is **not** showing in the Weightings column in your Actuals, follow the process above and include the following:

- Make sure that the Parent/Carer details have been entered correctly
- Make sure the Eligibility Checking for EYPP box has been ticked

If these are fully completed or the claim is for the non-economic reasons:

- Child is Adopted from care
- Child has left care on a SGO or
- Child Arrangement Order

evidence of their entitlement **must** be attached to the **Documents** tab and a note added to the **Notes** tab

- Select **Save** when all tabs have been completed.

- Select **Send Claim** when all adjustments have been made.
- The changes will show as **Awaiting LA Download** as previously described.

Check the Summary tab:

The child's **Summary** tab will show the funding paid for the child for the term. It will also show the amount paid as an Adjustment:

Example:

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Holly Hope DOB: 02-Feb-2018

Summary Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

Term Start Date	02-Sep-2021	Universal Funding	
Term End Date	17-Dec-2021	Funded Hours Per Week	15.00
No of weeks attended	14.00	Funded Hours for Term	210.00
Nominated for DAF	Yes		
Provider Total Rate	£4.15	Funding Amount @ Provider Rate	£871.50
		Child Weightings	£0.00
		Universal Funding Amount	£871.50
		Totals	
		Funded Hours Per Week	15.00
		Funded Hours for Term	210.00
		Total Funding (excl. Adj)	£871.50
		Total amount from Adjustments	£615.00
		Total amount from Pending Adjustments	£0.00
		Total Funding For Term (inc Adj)	£1486.50

Save Cancel *denotes mandatory fields

2 Year Funding

To enter an Adjustment for 2 year funding:

- Follow the basic process as for 3 & 4 year funding pages 1 to 4
- Select 2 Year Olds from the Funding Type column:

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

Adjustments Head Count Records for 2021/2022 - Autumn Term

2021/2022

Autumn Term
Submission Period: 01-Nov-2021 to 03-Dec-2021

Funding Type	Actuals (Office use only)		
	Ready To Process	Processed	Editable
2 Year Olds	✓	✓	
3 & 4 Year Olds 3	✓	✓	

- The list of children will show, the same as the **Actuals** list:
- Select one of the 2 options in the same way as entering the Headcount:

- Add Child
- Enter EY Voucher

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
 To add a new child, click on the add child box below and complete all the details in every tab and click save.
 When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE ⓘ

Add Child **Enter EY Voucher** Send Claim

Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
	Russell, Jack (31-Aug-2019)	0.00	210.00	£1144.50

Add Child **Enter EY Voucher** Send Claim

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To add a new child missed off the Headcount or starting after the Headcount:

- Select Add Child or Enter EY Voucher

If you select EY Voucher, the following box will pop up to enter the code details:

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**

The details will pre-populate, the same as when entering the Headcount.

If you do not have a voucher code e.g. if the child has a confirmation letter from a different local authority:

- Select Add Child and enter the details manually

Example:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details **Funding Details** Documents Pending Adjustment Notes

Child Details

Forename* Davey

Middle Name

Surname* Jones

DOB* 05-Sep-2018

Proof of DOB

Gender* Male Female

Preferred Surname

Ethnicity* White - British

SEN COP Stage Education, Health and Care P

Address

Address Line 1* 22

Address Line 2 The Close

Address Line 3

Locality

Town Warwick

County

Postcode* CV34 4UL

Save Cancel *denotes mandatory fields

- Select **Funding Details** tab:
- Complete Funding Details boxes, some boxes will be 'greyed out'

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details **Funding Details** Documents Pending Adjustment Notes

Funding Details

Start Date*

End Date*

Default Term Dates

Weeks Attended in Term* 0.00

Present during Census

Attends Two Days or More

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* 0.00

Non-Funded Hours per Week

Non-Funded Hours* 0.00

ⓘ 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

Maximum Values Allowed:

Number of Weeks: **14.00**

Universal Weekly Hours: **15**

Universal Termly Hours: **210**

Universal Yearly Hours: **570**

Save Cancel *denotes mandatory fields

- Enter the date the child started:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details **Funding Details** Documents Pending Adjustment Notes

Funding Details

Start Date*

End Date*

Default Term Dates

Weeks Attended in Term*

Present during Census

Attends Two Days or More

Universal Funded Hours per Week

Universal Hours*

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*

⚠ 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

Maximum Values Allowed:

Number of Weeks: **14.00**

Universal Weekly Hours: **15**

Universal Termly Hours: **210**

Universal Yearly Hours: **570**

*denotes mandatory fields

Save Cancel

- Select **Documents** tab if the child has been issued with an eligibility confirmation letter or email from another local authority
- Upload the file with the supporting information

Organisation: **Tribal Test**
Provider: Tribal Test (Day Nursery) ▼

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Child Details Parent / Carer Details **Funding Details** **Documents** Pending Adjustment 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 999 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

*denotes mandatory fields

Save Cancel

- Select **Pending Adjustments** tab:
- Enter the details using the process in pages 7 to 9

Child Details Parent / Carer Details Funding Details Documents Pending Adjustment Notes

? Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
 The number of funded weeks for the term and term dates are found on the Home page.

Example:
 Number of weekly hours to add/deduct = 15
 Number of weeks from the adjustment start date to the end of the term = 6
 Number of Hours to enter 15 x 6 = 90

To add hours select **More Hours**
 To remove hours select **Less Hours**

Universal Pending Adjustment

Number of Hours

Reason (500 characters)

Maximum Values Allowed:
 Universal Termly Hours: **210.00**
 Universal Yearly Hours: **570.00**

*denotes mandatory fields

- Enter the hours and the **Reason**:

Universal Pending Adjustment

Number of Hours More Hours

Reason (500 characters)

Late starter new to funding

6 weeks funding requested to end of term for 15 hours

6 x 15 = 90 hours

Maximum Values Allowed:
 Universal Termly Hours: **210**
 Universal Yearly Hours: **570**

*denotes mandatory fields

- Select **Save**

It will return to the first page and the adjustment added will show as **New, Unsubmitted Claim**

Summary Estimates Actuals **Adjustments** Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE

Add Child Enter EY Voucher Send Claim

	Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
	New, Unsubmitted Child	Jones, Davey (05-Sep-2018)	90.00	90.00	£490.50
		Russell, Jack (31-Aug-2019)	0.00	210.00	£1144.50

Add Child Enter EY Voucher Send Claim

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Changes to an existing Claim:

To make a change to a child added at Headcount:

- Click on child's name and it goes straight to the Pending Adjustment tab

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

Enter the total number of hours to be adjusted (weekly hours x number of weeks remaining).
The number of funded weeks for the term and term dates are found on the Home page.
Example:
Number of weekly hours to add/deduct = 15
Number of weeks from the adjustment start date to the end of the term = 6
Number of Hours to enter 15 x 6 = 90
To add hours select More Hours
To remove hours select Less Hours

Universal Pending Adjustment
 Number of Hours
 Reason (500 characters)

Maximum Values Allowed:
 Universal Termly Hours: **210.00**
 Universal Yearly Hours: **570.00**

Save Cancel *denotes mandatory fields

- Enter the adjustment as detailed on pages 7 to 16
- Click on Save

Submit Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE

[Add Child](#) [Enter EY Voucher](#) [Send Claim](#)

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
		New, Unsubmitted Child	Jones, Davey (05-Sep-2018)	90.00	90.00	£490.50
		Unsubmitted Claim	Russell, Jack (31-Aug-2019)	-84.00	126.00	£686.70

[Add Child](#) [Enter EY Voucher](#) [Send Claim](#)

- The change will show as Unsubmitted Claim
- When all Adjustments have been entered Click on **Send Claim**
- The Submission Confirmation will be shown:

Home **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

Submission Successful

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE

[Add Child](#) [Enter EY Voucher](#) [Send Claim](#)

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
		New, Awaiting LA Download	Jones, Davey (05-Sep-2018)	90.00	90.00	£490.50
		Awaiting LA Download	Russell, Jack (31-Aug-2019)	-84.00	126.00	£686.70

[Add Child](#) [Enter EY Voucher](#) [Send Claim](#)

- The Status will now show as Awaiting LA Download
- After the LA have accepted the Adjustments, the screen will show:

Organisation: **Tribal Test**
 Provider: **Tribal Test (Day Nursery)**

Home Forms **Funding** Sufficiency

Summary Estimates Actuals **Adjustments** Eligibility Checker

To change hours, click on the child's name highlighted in blue and enter the details on the pending adjustments tab.
To add a new child, click on the add child box below and complete all the details in every tab and click save.
When all adjustments have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will be displayed.

Submit Adjustments: 2021/2022 Autumn Term - 2 Year Olds CHANGE

▶ **Not Paid** - Total: £32.70

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

Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
	Jones, Davey (05-Sep-2018)	0.00	90.00	£490.50
	Russell, Jack (31-Aug-2019)	0.00	126.00	£686.70

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

Unsubmitted Claims

- An unsubmitted claim will show if a claim was entered but was **not** submitted before the submission deadline date at the Headcount.
- It will show as a red circle with an exclamation mark:

- Unsubmitted claims will be highlighted on your Home page:

Historical Notifications

These records were edited but never claimed.

▼ [Click here to view these items](#)

▶ There are unsubmitted records which are outside the submission window for Provider:

And

- next to the **Funding Type** for that term:

- ! 2 Year Olds
- ! 3 & 4 Year Olds 3

- The child on your Actual list that this relates to will also have the exclamation mark next to their name:



- As the **Adjustment** list is the same as the **Actuals** list, the children will also appear on the Adjustment list with the exclamation mark next to the child's name.
- The unsubmitted claims **cannot** be submitted from the Adjustments tab as the Headcount submission deadline has passed.
- The child must be **deleted** and added again as a **New Child** detailed in pages 4 to 20.

To Delete a child with an unsubmitted claim:

- Hover over the upturned **Edit** arrow

! ↻	New, Unsubmitted Child	Morris, William (03-Jan-2018)	210.00	0.00	210.00	0.00	£871.50
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- The **Confirm Delete** box will appear and select **Yes**

