GUIDANCE FOR SYNERGY PROVIDER PORTAL ONLINE ADJUSTMENT PROCESS

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Working for Warwickshire



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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: <u>https://admissions.warwickshire.gov.uk/synergy/providers</u>

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

	Organisation: Tribal Test Provider: Tribal Test (Day Nursery) 🗸
Home Forms Funding Sufficien Summary Estimates Actual Adjustments ling	ility Checker
Select Year and Term	
2021/2022	
Autumn Term	

- 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 Adju	ustments Eligibility Checker		\backslash		
			\backslash		
Adjustments Head Count	t Records for 2021/2022 - Autur	nn Term	$\langle \rangle$		
2021/2022			Actuals (Office u	ise only)	
🖪 Autumn Term	Funding Type		Ready To	Processed	Editable
Submission Period: 01-Nov-2021 to 03-Dec-2021	5 51		Process		
2020/2021	2 Year Olds		~		
2019/2020	3 & 4 Year Olds 3)	
2018/2019	A				
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.

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



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 be 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.

	Organisation: Tribal Test
	Provider: Tribal Test (Day Nursery) 🗸
Home Forms Funding	Sufficiency
Summary Estimates Actuals Adjus	tments Eligibility Checker
Adjustments Head Count	Records for 2021/2022 - Autumn Term
2021/2022	Actuals (Office use only)
🛃 Autumn Term	Funding Type Ready To Processed Editable
Submission Period: 01-Nov-2021 to 03-Dec-2021	Process
	2 Year Olds
	& 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.

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How to enter an Adjustment

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

	Organisation Provider: Tribal	: Tribal Test Test (Day Nursery) 🗸		
Home Forms Funding S	ufficiency ments Elizability Checker			
Adjustments Head Count F	Records for 2021/2022 - Autumn Term			
2021/2022		Actuals (Office u	se only)	
Autumn Term	Funding Type	Ready To Process	Processed	Editable
01-Nov-2021 to 03-Dec-2021	2 Year Olds	~		
	3 & 4 Year Olds 8	*	*	

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

			Provi	Organisatio der: Tribal	n: Tribal Test Test (Day Nursery) 🔊			
Home Summar	Forms Funding Suff	iciency Its Eligibility Checker	r					
•	 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. 							
Submi	t Adjustments: 2021/20	022 Autumn Te	erm - 3 & 4	Year Olds	3 CHANGE 🥠			
Stat	us	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 <u>all</u> boxes.
- Do not select Save until all tabs have been completed.

Child Details tab:

Details Parent / Carer Details	Funding Details Documents Pending Adj	ustment Notes	
Child Details		Address	
Forename*		Address Line 1*	
Middle Name		Address Line 2	
Surname*		Address Line 3	
DOB*		Locality	
Proof of DOB		Town	
Gender*	Male Female	County	
Preferred Surname		Postcode*	
Ethnicity*	Information Not Vet Obtainer	×	
SEN COR Stane			

Parent/Carer Details tab:

Home Forms Funding Sufficiency Summary Estimates Actuals Adjustments Eligibility (Checker		
Child Details Parent / Carer Details Funding Details Entering Parent/Carer details enables us to c extended hours. Please ensure you input details for all record that the correct consent boxes are selected a Details are optional but if entered then at lex	Documents Pending Adjustment theck whether the child is eligible is that have given their permission as per the usage of the details. ast Forename, Surname and NI or	Notes for Early Years Pupil Premium (EYPP) fu to do so, as this ensures you receive t NASS Number must be filled in.	unding, and whether the child is eligible for the additional funding. Please also ensure
Parent / Carer Details		Partner Details	
Forename Surname DOB Construction NASS Number Construction Constructio		Forename Surname DOB NI or NASS Number	
Tick to give consent to Eligibility 🛛 E Checking for	үрр 🗌 зон	Tick to give consent to Eligibility Checking for	🗆 ЕҮРР 🗌 ЗОН
Save Cancel *denotes mandate	ory fields		

© 2021 Servelec Svnerav Itd

FIS Provider Portal - Part of the Synerov FIS Suite

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.

		Attendance Days	
Start Date*	01-Nov-2021	Attends Monday	Yes O No
End Date*	17-Dec-2021	Attends Tuesday	● Yes ○ No
	Default Term Dates	Attends Wednesday	● Yes ○ No
		Attends Thursday	● Yes ○ No
Weeks Attended in Term*	0.00	Attends Friday	Yes O No
Present during Census		Attends Saturday	○ Yes ○ No
Attends Two Days or More		Attends Sunday	○ Yes ○ No
Nominated for DAF*	🔾 Yes 🖲 No		
Universal Funded Hours per W	eek	Non-Funded Hours per We	ek
Jniversal Hours*	0.00	Non-Funded Hours*	0.00
Extended Funded Hours per W	ee <mark>k</mark>	if this child attends anothe	er setting as well as yours, be sure to enter the
xtended Hours*	0.00	hours as per what has been a	greed with the child's parent/carer
30H Eligibility Code			
	30 Hours Free Childcare	Maximum Values Allowed:	
	So Hours Free Childcare	Number of Weeks: 14.00	
		Universal Weekly Hours: 15	
ligible for 30H		Universal Termly Hours: 210	
Ilgible for 30H		oniversal really flours. Jro	
Ingible for 30H Total Funded Hours per Week Fotal Funded:	0.00		
Ingible for 30H Total Funded Hours per Week Fotal Funded:	0.00	Extended Weekly Hours: 15	

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:

 Enter the total number of hours to be adjusted (weekly hours in The number of funded weeks for the term and term dates are Example: Number of weekly hours to add/deduct = 15 Number of weeks from the adjustment start date to the end on Number of Hours to enter 15 x 6 = 90 To add hours select More Hours To remove hours select Less Hours 	x number of weeks remaining). found on the Home page. f the term = 6
Jniversal Pending Adjustment Iumber of Hours eason (500 characters)	Extended Pending Adjustment Number of Hours Reason (500 characters)
Maximum Values Allowed: Jniversal Termly Hours: 210.00 Jniversal Yearly Hours: 570.00	Maximum Values Allowed: Extended Termly Hours: 210.00 Extended Yearly Hours: 570.00

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

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Example:

If a child was missed off the Headcount:

Mulitiply 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	210	
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:

 Enter the total number of hours to be adjusted (weekly hour The number of funded weeks for the term and term dates ar Example: Number of weekly hours to add/deduct = 15 Number of weeks from the adjustment start date to the end Number of Hours to enter 15 x 6 = 90 To add hours select More Hours To remove hours select Less Hours 	s x number of weeks remaining). e found on the Home page. of the term = 6
Universal Pending Adjustment Number of Hours More Hours 210 teason (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 Values 570.00	Maximum Values Allowed: Extended Termly Hours: 210.00 Extended VearU Hours: 570.00

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

The following errors messages will be shown

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If the Reason box has not been completed with a permitted Adjustment as listed on page 2 or from section2 .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:

To cl	ange hours, click on the child	l's name highlighted	in blue and ent	ter the details o	on the pending adjustn	nents 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 lox. If successful, a 'green tick' confirmation will be displayed.								
ubmit Ad	justments: 2021/2022	2 Autumn Term	1 - 3 & 4 Ye	ar Olds 3 C	HANGE 🥨			
Add Child	Send Claim							
Add Child	Send Claim							
			Pending	Pending	Universal Hours	Extended Hours	Total Funding	FIL II III. C .
Statt	s	Child	Adj Hours	Adj Hours	(inc Adj)	(inc Adj)	(inc Adj)	Eligibility Sta
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	
		(05 1107 2011)						
		(05-Nov-2017)	0.00	0.00	108.00	0.00	2097.20	

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 (12×14 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

(00 Widi -2010)					
Wicks, Joe (05-Nov-2017)	0.00	0.00	168.00	0.00	£697.20

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':

any come occord Patente) caler t		Holes	
Funding Details		Attendance Days	
Start Date*	02-Sep-2021	Attends Monday	🔿 Yes 🔍 No
End Date*	17-Dec-2021	Attends Tuesday	🔿 Yes 💿 No
	Default Tarm Dates	Attends Wednesday	🔿 Yes 🖲 No
	Default Term Dates	Attends Thursday	🔿 Yes 🖲 No
Weeks Attended in Term*	14.00	Attends Friday	🔿 Yes 🖲 No
Present during Census		Attends Saturday	🔿 Yes 🖲 No
Attends Two Davs or More		Attends Sunday	🔿 Yes 🖲 No
Nominated for DAF*	O Yes 🔍 No		
Universal Funded Hours per W	eek	Non-Funded Hours per Wee	k
Universal Hours*	12.00	Non-Funded Hours*	0.00
Extended Funded Hours per W	eek	🕕 if this child attends anothe	r setting as well as yours, be sure to enter the
Extended Hours*	0.00	hours as per what has been ag	greed with the child's parent/carer
30H Eligibility Code			
	20 Hours Free Childcare	Maximum Values Allowed:	
		Number of Weeks: 14.00	
Eligible for 30H		Universal Weekly Hours: 15.0	0
Total Funded Hours per Week		Universal Termly Hours: 210.0	10
Total Funded:	12.00	Universal Yearly Hours: 570.0	u la
	12.00	Extended Weekly Hours: 15.0	0
		Extended Yearly Hours: 210.0 Extended Yearly Hours: 570.0	0

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

Summary Estimates Actuals Adjustments Eligibility Chec	ker		
Name: Joe Wicks DOB: 05-Nov-2017			
Summary Child Petalis Parent / Carer Details Funcing	Details Documents Pend	ling Adjustment Notes	
Entering Parent/Carér details enables us to chec extended hours. Please ensure you input details for all records th	k whether the child is eligit at have given their permis:	ble for Early Years Pupil Premium (EYPP) fu	unding, and whether the child is eligible for the additional funding. Please also ensure
that the correct consent boxes are selected as p	er the usage of the details.	,	5
Details are optional but if entered then at least F	orename, Surname and NI	or NASS Number must be filled in.	
Parent / Carer Details		Partner Details	
Forename		Forename	
Surname		Surname	
DOB		DOB	
NI or NASS Number		□ NI or □ NASS Number	
Tick to give consent to Eligibility EYPP Checking for	🗆 зон	Tick to give consent to Eligibility Checking for	С ЕУРР С ЗОН
*denotes mandatory fi	elds		

Page **11** of **32**

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

		Attendance Days	
Start Date*	02-Sep-2021	Attends Monday	🔿 Yes 🖲 No
End Date*	17-Dec-2021	Attends Tuesday	🔿 Yes 🖲 No
	Default Tarm Datas	Attends Wednesday	🔿 Yes 🖲 No
	Default ferm Dates	Attends Thursday	🔿 Yes 🖲 No
Weeks Attended in Term*	14.00	Attends Friday	🔿 Yes 🖲 No
Present during Census	V	Attends Saturday	🔿 Yes 🖲 No
Attends Two Days or More		Attends Sunday	🔿 Yes 💿 No
Nominated for DAF*	O Yes No		
Universal Funded Hours per W	Veek	Non-Funded Hours per We	ek
Universal Hours*	12.00	Non-Funded Hours*	0.00
Extended Funded Hours per W	Veek	if this child attends anothe	er setting as well as yours, be sure to enter the
Extended Hours*	0.00	hours as per what has been a	greed with the child's parent/carer
30H Eligibility Code			
30H Eligibility Code	20 Hours Free Childcare	Maximum Values Allowed:	
30H Eligibility Code	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 14.00	
30H Eligibility Code	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15.0	0
30H Eligibility Code	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15.0 Universal Termly Hours: 210.1	0
30H Eligibility Code	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15.0 Universal Termly Hours: 210. Universal Tearly Hours: 570.0	0 20 0
30H Eligibility Code	30 Hours Free Childcare	Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15.0 Universal Termly Hours: 210. Universal Yearly Hours: 570.0 Extended Weekly Hours: 15.0	0 00 0

• Select Pending Adjustment tab

nmary Child Details Parent / Carer Details Funding Details Documers Pend	ing Adjustment Tytes
Enter the total number of hours to be adjusted (weekly hours : The number of funded weeks for the term and term dates are Example: Number of weekly hours to add/deduct = 15 Number of weeks from the adjustment start date to the end o Number of Hours to enter 15 x 6 = 90 To add hours select More Hours To remove hours select Less Hours	x number of weeks remaining). found on the Home page. f the term = 6
Universal Pending Adjustment Number of Hours v v v v v v v v v v v v v v v v v v v	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	

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• 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

Enter the total number of hours to be adjusted (weekly hou The number of funded weeks for the term and term dates a Example: Number of weekly hours to add/deduct = 15 Number of weeks from the adjustment start date to the end Number of Hours to enter 15 x 6 = 90	rs x number of weeks remaining). re found on the Home page. I of the term = 6
To remove hours select Less Hours	
Universal Rending Adjustment	Extended Pending Adjustment
ieeson (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	Reason (500 characters)

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**

Name: Joe Wicks DOB: 05-Nov-2017

Summary Child Details Parent / Carer Details Funding Details Documents Pen Image: Comparison of the term of term of the term and term dates are the term. Example: Comparison of the term of term of the term of te	ding Adjustment Notes x number of weeks remaining). a found on the Home page. of the term = 6
Universal Pending Adjustment Number of Hours Reason (50) characters) Neorect hours added at Headcount, should be 9 hours per week Overclaim of 3 hours per week x 14 weeks = 42 hours	Extended Pending Adjustment Number of Hours Reason (500 characters)
Maximum Values Allowed:	Maximum Values Allowed:
Universal Termly Hours: 210.00 Universal Yearly Hours: 570.00	Extended Termly Hours: 210.00 Extended Yearly Hours: 570.00
Save Cancel *denotes mandatory fields	

Note: You <u>do not</u> 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.

lome ummar	Forms Funding Sufficient ry Estimates Actuals Adjustments E To change hours, click on the child's To add a new child, click on the add	n cy ligibility Checker s name highlighted child box below an	in blue and ent	er the details o the details in e	on the pending adjustr	nents tab.		
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 i								
Add (Child Send Claim		Pending	Pending		r	Total Funding	
	Status	Child	Universal Adj Hours	Extended Adj Hours	(inc Adj)	(inc Adj)	Amount for Ťerm (inc Adj)	Eligibility Status
• •	New, Unsubmitted Child	(25-Dec-2017) Hope, Holly (02-Feb-2018)	0.00	0.00	210.00	0.00	£435.75 £871.50	
_		Star, Sally (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
Add (Unsubmitted Claim	Wicks, Joe (05-Nov-2017)	21.00	0.00	189.00	0.00	£784.35	
2021 Ser	rvelec Synergy Ltd						FIS Provider Portal - Part	of the Synergy FIS

The adjustments entered will show as Unsubmitted Claim:

- 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	For	ms Funding	Sufficie	ncy							
Summar	ry Esti	mates Actuals Adju	stments E	ligibility Checker							
~	Subm	ission Successful									
0	To cł	nange hours, click on	the child'	s name highlighted	l in blue and er	ter the details	on the pending adjust	ments tab.			
	To ad	dd a new child, clidk (on the add	l child box below a	nd complete al	I the details in	every tab and click say	/e.			
	Whe	n all adjustments hav	ve been ad	lded, you must clic	k on the send o	laim box. If su	ccessful, a 'green tick'	confirmation will be d	isplayed.		
Submi	t Ad	justments: 202	1/2022	Autumn Tern	n - 3 & 4 Ye	ear Olds 3	CHANGE 🕠				
Not F	Paid -	Total: £1747.95									
Add (Child	Send Claim									
	Statu	s		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		Û
		•		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		
0 2	Await	ing 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**:

7								_
Home Forms Funding Suff	ficiency		/ _					
Summary Estimates Actuals Adjustmen	nts Eligibility Checker							
Submission Successful								
To change hours, click on the	child's name highlighted	in blue and enter	the details o	on the pending adjust	ments tab.			
To add a new child, click on th	e add child box below a	nd complete all th	e details in e	very tab and click sav	e.			
When all adjustments have be	en added, you must click	c on the send clain	n box. If suc	cessful, a 'green tick' (onfirmation will be d	isplayed.		
		/						_
Submit Adjustments: 2021/20	022 Autumn Term	1 - 3 & 4 Year	• ølds 3 c	HANGE 🥨				
Not Paid - Total: £1747.95								
Add Child Send Claim								
Status	Child	Pending Universal Adj Hours	nding tended Ij 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		Q
	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 Adjus	stments: 2021/2	022 Autumn Te	rm - 3 & 4	Year Olds 3	CHANGE				
Not Paid - Tot	tal: £1835.10								
Add Child	Send Claim								
Status		Сына	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		Ø
		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 and 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

Summary	Child Details	Parent / Carer Details	Funding Details	Documents	Pending Adjustment	Notes
	Enter the	total number of ho	urs to be adjuste	ed (weekly h	ours x number of	weeks remaining).
	The num	ber of funded week	s for the term an	d term date	s are found on the	Home page.
	Example					
	Number	of weekly hours to a	add/deduct = 15			
	Number	of Weeks from the a of Hours to enter 15	$5 \times 6 = 90$	date to the	end of the term = (2
	To add b	ours select More Ho	urs			
	To remov	e hours select Less	Hours			
Univer	sal Pending A	djustment			Extende	d Pending Adjustment
Numbe	r of Hours	More Hours 🗸	10.00)	Number	of Hours
Reason	(500 characte	rs)			Reason (500 characters)
Added	another session	on				
				11		
Maxim	um Values Al	lowed:			Maximu	m Values Allowed:
Univers	al Termly Hou	rs: 165.00			Extende	d Termly Hours: 165.00
Univers	al Yearly Hou	rs: 570.00			Extende	d Yearly Hours: 570.00
~	Cancal	*denotes ma	indatory 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'

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		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		Q
0	っ	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 D	etails Funding Details	Documents	Pending Adjustment Notes	
Term Start Date	04-Jan-2022		Universal Funding	
Term End Date No of weeks attended	08-Apr-2022 11.00		Funded Hours Per Week	
Nominated for DAF	No		Funded Hours for Term	
Provider Total Rate	£4.15		Funding Amount @ Desuider	Data
			Child Weightings	Kate
Claim Rejected	ustment has not been a	ddad and th		
calculation of the hours has not b	been shown	dded and th	Universal Funding Amount	
			Totals	
			Funded Hours Per Week	
			Funded Hours for Term	
			Total amount from Adjustment	·c
			Total amount from Pending Ad	ljustment
			Total Funding For Term (inc /	Adj)
			-	
Save Cancel *deno	otes mandatory fields			

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

me: Smythe John DOB: 05-Sep-2018	
nmary Child Details Parent / Carer Details Funding Details Document	ts Pending Adjustment Notes
Enter the total number of hours to be adjusted (week) The number of funded weeks for the term and term data	y hours x number of weeks remaining). ates are found on the Home page.
Example: Number of weekly hours to add/deduct = 15 Number of weeks from the adjustment start date to th Number of Hours to enter 15 x 6 = 90 To add hours select More Hours To remove hours select Less Hours	ne end of the term = 6
Universal Pending Adjustment	Extended Pending Adjustment
Jumber of Hours More Hours 🖌 10.00	Number of Hours 🗸
Reason (500 characters)	Reason (500 characters)
More hours added	
F weaks v 2 haurs	
5 weeks x 2 hours	
Change in parent's working schedule	
Maximum Values Allowed:	Maximum Values Allowed:
Universal Termby Hours: 16E 00	Extended Termix Hourse 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	e Forms	Funding	Sufficiency			
Summa	ary Estimates	s Actuals Adju	istments Eligibility Checke	r		
View	Actuals: 2	2021/2022	Spring Term - 3 &	2 4 Year Olds 3 C	HANGE	
	Child		Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weighting
	Bank, Mark (22-Mar-20	c 18)	165.00	0.00	£1387.20	EYPP
0	John, Smyt (05-Sep-201	he 18)	157.00	0.00	£651.55	
	Light, Lucy		110.00	0.00	CE14.00	DE

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

nmary Estimates Actuals Adjustment	s Eligibility Checker	
Adjustments cannot be added, d	lue to the status being ' Adjustments Claim Reje	ected'. Please correct and Re-Send the Claim.
me: Smythe John DOB: 05	-Sep-2018	
mary Child Details Parent / Carer [Details Funding Details Documents Notes	1
Term Start Date	04-Jan-2022	Universal Funding
Term End Date	08-Apr-2022	Funded Hours Per Week
No of weeks attended	11.00 No	Funded Hours for Term
Provider Total Rate	£4.15	Funding Amount @ Provides Pote
		Child Weightings
Claim Rejected		child Weightings
The reason for the permitted adj	ustment has not been added and the	
calculation of the field s 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 Adjustment
		Total Funding For Term (inc Adj)

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Paid Adjustments

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

o	L			0
Subm	it Adjustments: 20:	1/2022 Autumn Te	rm - 3 & 4 Year Old	Is 3 CHANGE 🤢
Paid	as Adjustments - Total:	£1835.10		

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:

Туре	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 headcou attending 15 hours weeks, 210 funded I	nt claim per week fo hours reque	or 14 ested
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 enter Headcount claim 15 but the claim should 12 hours difference week x 14 weeks = - overclaimed	ered on the bours clain d have been of 3 hours p 42 hours	ned 1 for per
Child	01-Dec-2021	Hope Holly	02-Feb-2018					£615.00	System generated a [DAF].	djustment f	for
Not Pa	aid - Total: £87	7.15									

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:

(U2-Feb-2018)		

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- 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

mary Estimates Actuals Adjustment			
ie: Holly Hope DOB: 02-F	eb-2018		
nary Child Details Parent / Carer I	Details Funding Details Documents	Pending Adjustment Notes	
Funding Details		Attendance Days	
Start Date*	02-Sep-2021	Attends Monday	🔿 Yes 💿 No
End Date*	17-Dec-2021	Attends Tuesday	🔿 Yes 💿 No
		Attends Wednesday	🔿 Yes 💿 No
	Detault lerm Dates	Attends Thursday	🔿 Yes 🖲 No
Weeks Attended in Term*	14.00	Attends Friday	🔿 Yes 💿 No
Descent during Commun		Attends Saturday	
Present during Census		Attenus Saturday	🔾 Yes 🔍 No
Attends Two Days or More		Attends Sunday	O Yes O No
Attends Two Days of More Nominated for DAF*	Yes O Nt	Attends Sunday	Ves INO
Artends Two Days or More Nominated for DAF*	Yes O No	Attends Sunday Non-Funded Hours per Wee	O Yes ♥ No O Yes ♥ No
Attends Two Days or More Attends Two Days or More Nominated for DAF* Universal Funded Hours per W Universal Hours*	Yes O No Is.00	Attends Sunday Non-Funded Hours per Wee Non-Funded Hours*	○ Yes ● No ○ Yes ● No ek
Affends Two Days or More Affends Two Days or More Nominated for DAF* Universal Funded Hours per W Universal Hours*	Yes No 15.00	Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* Image: Image of the standard strength	Ves No Ves No No ek 0.00 er setting as well as yours, be sure to enter the
Attends Two Days of More Attends Two Days of More Nominated for DAF* Universal Funded Hours per W Extended Funded Hours Per W Extended Hours*	Yes No 15.00	Attends Sunday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* if this child attends anothe hours as per what has been as	Ves No Ves No
Attends Two Days of More Attends Two Days of More Nominated for DAF* Universal Funded Hours per W Universal Hours* Extended Funded Hours # 30H Eligibility Code	Yes O No 15.00	Attends Sunday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* fi this child attends anothe hours as per what has been a	Ves No Ves No Ves No k
Attends Two Days of More Attends Two Days of More Nominated for DAF* Universal Funded Hours per W Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code	Yes O No 15.00	Attends Sunday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* i if this child attends anothe hours as per what has been an Maximum Values Allowed:	Ves No Ves No Ves No
Attends Two Days or More Attends Two Days or More Nominated for DAF* Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code	Ves O No 15.00 Ceek 0.00 30 Hours Free Childca	Attends Saddbay Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* if this child attends anothe hours as per what has been an re Maximum Values Allowed: Number of Weeks: 14.00	Ves No Ves No Ves No
Attends Two Days or More Nominated for DAF* Universal Funded Hours per W Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code Eligible for 30H	Ves No 15.00 16ek 0.00 30 Hours Free Childca	Attends Saiduday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* i if this child attends anothe hours as per what has been an re Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15	Ves No Ves No
Attends Two Days or More Nominated for DAF* Universal Funded Hours per W Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code Eligible for 30H	Ves No 15.00 Veek 30 Hours Free Childca	Attends Saiduday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* i if this child attends anothe hours as per what has been an re Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15 Universal Weekly Hours: 210	Ves No Ves No Ves No
Avends Two Days or More Avends Two Days or More Nominated for DAF* Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code Eligible for 30H Total Funded Hours per Week Total Funded Hours per Week	Ves No 15.00 Veek 0.00 30 Hours Free Childca	Attends Sunday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* i if this child attends anothe hours as per what has been ag re Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15 Universal Yearly Hours: 210 Universal Yearly Hours: 570	Ves No Ves No
Alkends Two Days of More Alkends Two Days of More Nominated for DAF* Universal Hours* Extended Funded Hours per W Extended Hours* 30H Eligibility Code Eligible for 30H Total Funded Hours per Week Total Funded:	Yes No 15.00	Attends Sunday Attends Sunday Non-Funded Hours per Wee Non-Funded Hours* i if this child attends anothe hours as per what has been as re Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 210 Universal Yearly Hours: 210 Universal Yearly Hours: 2570 Extended Weekly Hours: 15	Ves No Ves No

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	ending 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	DAF.docx	Delete
Save Cancel *denotes mandatory fields		

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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	Notes History
Eligible for DAF, DLA award letter added	No Historical Notes

*denotes mandatory fields

Click on Save

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: 2021/202 Add Child Send Claim	22 Autumn Tern	n - 3 & 4 Ye	ear Olds 3 (CHANGE (1)			
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	
	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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OFFICIAL

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

Details Parent / Carer Details Funding I	Details Documents Pending Adjustm	ent Notes	
Entering Parent/Carer details enables	us to check whether the child is eligi	ble for Early Years Pupil Premium (EYPP) f	unding, and whether the child is eligible fo
extended hours.	_		
Please ensure you input details for all	records that have given their permize	sion to do so, as this ensures you receive	the additional funding. Please also ensure
that the correct consent boxes are sel	ected as per the usage of the details		2
Details are optional but if entered the	n at least Forename, Surname and N	I or NASS Number must be filled in.	
Parent / Carer Details		Partner Details	
Forename	Martha	Forename	
Surname	Ball	Surname	
DOB	14-Dec-2001	DOB	
NI or 🛛 NASS Number	AB123 6C	□ NI or □ NASS Number	
Tick to give consent to Eligibility Checking for	🗹 ЕҮРР 🗌 ЗОН	Tick to give consent to Eligibility Checking for	ЕҮРР 30Н

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.

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- 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:

ary Child Details Parent / Care	r Details Funding Details Document	s Pending Adjustment Notes	
Term Start Date	02-Sep-2021	Universal Funding	
Term End Date	17-Dec-2021	Funded Hours Par Week	15.00
No of weeks attended	14.00	Funded Hours for Tarre	210.00
Nominated for DAF	Yes	Funded Hours for Term	210.00
Provider Total Rate	£4.15	Funding Amount @ Brouiday Poto	6971 50
		Child Weightings	2071.50
		Child Weightings	20.00
		-	
		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 Adi)	£1486 50

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:



- 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:

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• Add Child

• Enter EY Voucher

Home	Forms Funding Sufficien	Cy gibility Checker					
()	To change hours, click on the child's To add a new child, click on the add When all adjustments have been add	name highlighted in blue and enter the details on the child box below and complete all the details in every ed, you must click on the send claim box. If successfu	e pending adjus tab and click sa II, a 'green tick	tments tab. ve. confirmation	will be displayed.		
Submi	t Adjustments: 2021/2022 / Child Enter EY Voucher	Autumn Term - 2 Year Olds CHANGE (1)					
	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					
© 2021 Se	rvelec Synergy Ltd				FIS Provider Po	ortal - Part of the Synerg	y FIS Suite

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*	
Fundi	*denotes mandatory fields	
s Actuals	Submit Cancel	
a hours, cli	J.	
new child,	click on the add child box below and complete all the details in every tab and click save.	
adjustmer	nts have been added, you must click on the send claim box. If successful, a 'green tick' confirmation will	be disp

ments: 2021/2022 Autumn Term - 2 Year Olds CHANGE 🤃

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 Sut	fficiency		
Summary Estimates Actuals Adjustme	ents Eligibility Checker		
Child Details Parent / Carer Details F	unding Details Documents Pending Adjust	ment Notes	
Child Details		Address	
Forename*	Davey	Address Line 1*	22
Middle Name		Address Line 2	The Close
Surname*	Jones	Address Line 3	
DOB*	05-Sep-2018	Locality	
Proof of DOB		Town	Warwick
Gender*	🗹 Male 🗆 Female	County	
Preferred Surname		Postcode*	CV34 4UL
Ethnicity*	White - British 🗸		
SEN COP Stage	Education, Health and Care PI 🗸		
Save Cancel *de	enotes mandatory fields		

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

etails Parent / Carer Details Fu	Inding Details Documents Pending Adju:	stment Notes	
inadian Dataila		Attendence Dave	
tart Date*		Attendance Days	
nd Date*		Attends Tuesday	
		Attends Wednesday	
	Default Term Dates	Attends Thursday	
Veeks Attended in Term*	0.00	Attends Friday	
resent during Census		Attends Saturday	O Yes O No
ttends Two Days or More		Attends Sunday	○ Yes ○ No
Jniversal Funded Hours per V	Veek	Non-Funded Hours per We	ek
Iniversal Hours*	0.00	Non-Funded Hours*	0.00
		 if this child attends anothe hours as per what has been a Maximum Values Allowed: Number of Weeks: 14.00 Universal Weekly Hours: 15 Universal Termly Hours: 210 	er setting as well as yours, be sure to ent greed with the child's parent/carer
		Universal Yearly Hours: 570	

• Enter the date the child started:

ary Estimates Actuals Adjustment	s Eligibility Checker		
etails Parent / Carer Details Fun	ding Details Documents Pending	Adjustment Notes	
Funding Details		Attendance Days	
itart Date*	08-Nov-2021	Attends Monday	● Yes ○ No
nd Date*	17-Dec-2021	Attends Tuesday	● Yes ○ No
	Default Tarm Data	Attends Wednesday	● Yes ○ No
		Attends Thursday	● Yes ○ No
Veeks Attended in Term*	0.00	Attends Friday	● Yes ○ No
resent during Census		Attends Saturday	○ Yes ○ No
ttends Two Days or More		Attends Sunday	○ Yes ○ No
Jniversal Funded Hours per W	eek	Non-Funded Hours per We	ek
Iniversal Hours*	0.00	Non-Funded Hours*	0.00
		if this child attends anothe hours as per what has been a Maximum Values Allowed.	er setting as well as yours, be sure to enter the greed with the child's parent/carer
		Number of Weeks: 14 00	
		Number of Weeks. 14.00	
		Universal Weekly Hours: 15 Universal Termly Hours: 210	
		Universal Yearly Hours: 570	

- 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 A	djustment Notes	
Currenting Deguments		
Please upload any documents which support this term.		
Allowed file types are: All file types permitted		
Files may not be larger than 999 MB.		
		Upload a
		file
Description*	File Name	IIIe
No Documents Uploaded		
· · · · · · · · · · · · · · · · · · ·		
*denatar mandatan, fields		
Save Cancel		

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- 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
Save Cancel *denotes mandatory fields

• Enter the hours and the **Reason**:

Number (of Hours	More Hours 🗙	90
Reason (5	00 characters))	
Late star	rter new to fun	nding	
6 weeks	funding reque	sted to end of term for	15 hours
6 x 15 =	90 hours		
-			
Maximu	m Values Allo	wed:	
Maximu Universa	m Values Allo I Termly Hours	wed: : 210	
Maximu Universa Universa	m Values Allo I Termly Hours I Yearly Hours:	wed: : 210 570	
<mark>Maximu</mark> Universa Universa	m Values Allo I Termly Hours I Yearly Hours:	wed: : 210 570	
<mark>Maximu</mark> Universa Universa	m Values Allo I Termly Hours I Yearly Hours:	wed: : 210 570	

• Select Save

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

Summa	ary Estimates Actu	uals Adjustments Eligibility Check	er			
Ŷ	 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. 					
Submi	it Adjustmen	ts: 2021/2022 Autumn T	erm - 2 Year Olds CHANGE	į)		
Add	Child Ente	r EY Voucher Send Clai	im			
		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
0	n	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 Ente	r EY Voucher Send Clai	im			
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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 weekly 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 Yearly Hours: 570.00 *denotes mandatory fields	

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

Submit Ad	ljust	ments:	2021/2022	Autumn Term	- 2 Year Olds CHANGE 🤃				
Add Child		Enter E	Y Voucher	Send Claim					
			Status		Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	
0	ゥ		New, Unsubmitt	ed Child	Jones, Davey (05-Sep-2018)	90.00	90.00	£490.50	
0	っ		Unsubmitted Cla	iim	Russell, Jack (31-Aug-2019)	-84.00	126.00	£686.70	
Add Child		Enter E	Y 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 Summa	ry Estimates Actu	ding Sufficiency als Adjustments Eligibility Checker					
\checkmark	Submission Succ	essful					
¢	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.						
Submi	it Adjustmen	ts: 2021/2022 Autumn Terr	n - 2 Year Olds CHANGE (i)				
Add (Child Ente	r EY Voucher Send Claim					
		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	
0	5	New, Awaiting LA Download	Jones, Davey (05-Sep-2018)	90.00	90.00	£490.50	
0	っ	Awaiting LA Download	Russell, Jack (31-Aug-2019)	-84.00	126.00	£686.70	
Add	Child Ente	r EY Voucher Send Claim	1				
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- 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 Summar	Form y Estim	s Funding Sufficien ates Actuals Adjustments Elig	cy gibility Checker			
٩	 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	t Adju	istments: 2021/2022 /	Autumn Term - 2 Year Olds CHANGE (j)			
Not P	aid - To	otal: £32.70				
Add C	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 C	Child	Enter EY Voucher	Send Claim			
A 2021 Con	unlae Cur	soons fiel			EIC Describer Dr	ntal – Dart of the Concern EIC Cuite

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:
 - 0
- 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:



• 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



• The Confirm Delete box will appear and select Yes

-	Confirm Delete
d	Are you sure you want to delete child: Morris, William from this headcount record?
d	Yes No