

# **Access Synergy FIS Provider Portal Online Funding Guidance**

**Updated March 2024**

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## 1. How to Log in

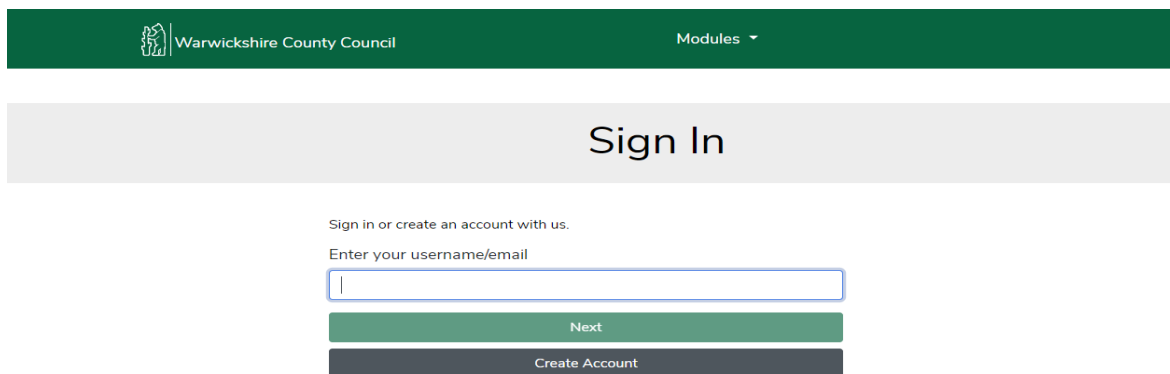
The Early Years Funding Team will set up registration for the Provider Portal and issue a setting with a username. This will be sent by email.

**Note: Always use the username sent to you and not an email address initially as this could be different to the one registered in our records. You can create an account later.**

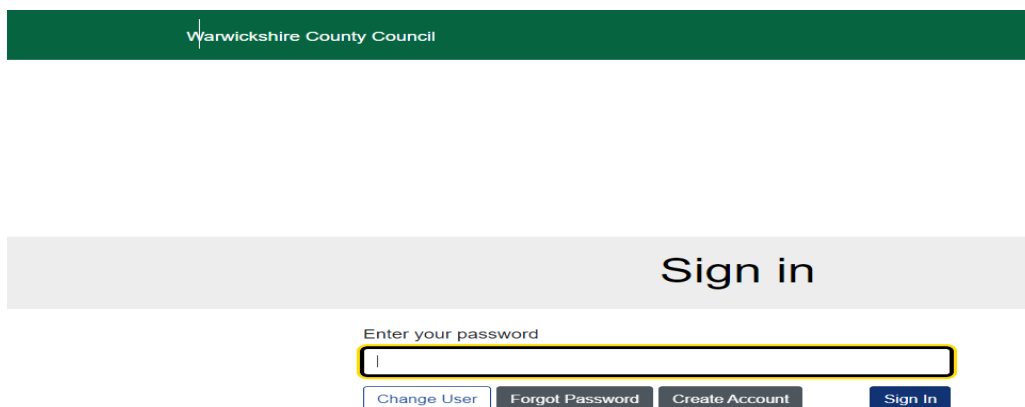
The web address for the Synergy Portal is:

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

The log in page will appear:



Enter the username and click on the 'Next' bar



Select the **Forgot Password** option and a token will be sent to the contact email address given.

## Enter Token

To reset your password, enter the token contained in the email that we sent you.

Token

Start Again

Help ▾

Reset Password

### Create an Account:

This is used to update your details and your email address.

Select the **Create Account** box:

## Sign In

Sign in or create an account with us.

Enter your username/email

Next

Create Account

Complete all of the details requested as below:

## Create Account

**Personal Details**

Title \*

Forename \*

Middle Name

Surname \*

**Contact Details**

Email Address \*

Confirm Email \*

Please confirm your email

Main number

Evening Number

Mobile Number

**Address**

No address to display

[Add Address](#)

**Account Security**

New Password \*

Confirm Password \*

Please confirm your password

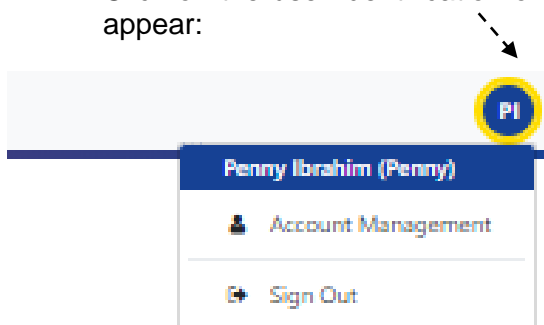
[Start Again](#) [Create](#)

An email with a link will be sent to the email address entered to verify the request.

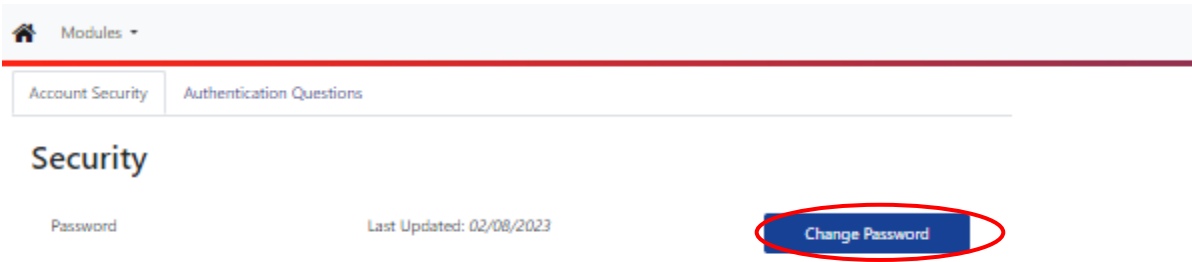
### Password Problems:

If you do not get a token by email, contact the [eyfunding@warwickshire.gov.uk](mailto:eyfunding@warwickshire.gov.uk) for a temporary password. This will expire within three days so this will need changing as soon as possible.

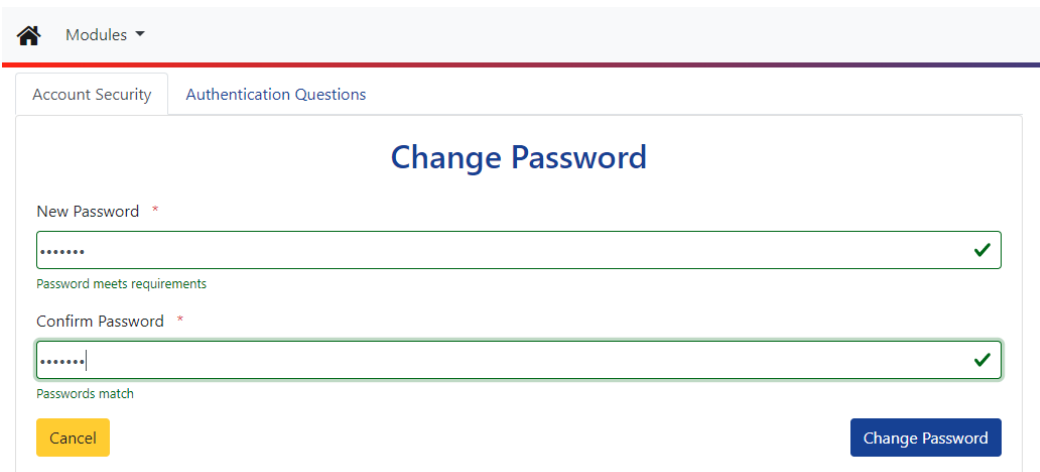
- Click on the user identification on the bar, see example below and the following will appear:



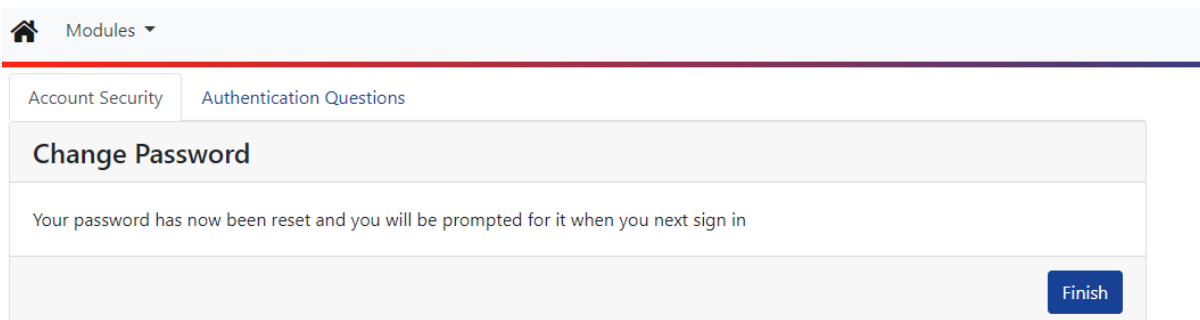
- Select Account Management



- Select the 'Change Password' box
- Enter the temporary password sent by the Early Years Funding Team by email and click on 'Next'



- Add a new password of choice. It is a good idea to keep a note of it in a safe place.



- Click Finish once the new password has been verified

## Authentication Questions:

When the Funding tab is selected, you will be asked to enter an answer to a security question. The early years funding department will email the initial responses to use. They are to be entered as the **Old Answer**.

You will then be requested to change the answers to all of the security questions. Select the Authentication Questions tab:

### They can also be changed by selecting Account Management as below

- Select Authentication Questions

Account Security Authentication Questions

Please change your authentication questions below

If an asterisk is displayed in front of an authentication question then the question has not yet been assigned a personal answer.

First pets name (Provider)  
Mothers maiden name (Provider)  
Town of birth (Provider)

Old Answer:

New Answer:

Confirm New Answer:

Save

- Select each question in turn:

First pets name (Provider)  
Mothers maiden name (Provider)  
Town of birth (Provider)

- Use the initial security answers sent by the Early Years Funding Team in the confirmation email as the **'Old Answer'**
- When the answers have been changed the following will show:



**Please change your authentication questions below**

If an asterisk is displayed in front of an authentication question then the question has not yet been assigned a personal answer.

First pets name (Provider)  
Mothers maiden name (Provider)  
Town of birth (Provider)

New answer successfully saved.

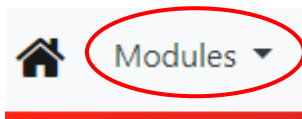
Old Answer:

New Answer:

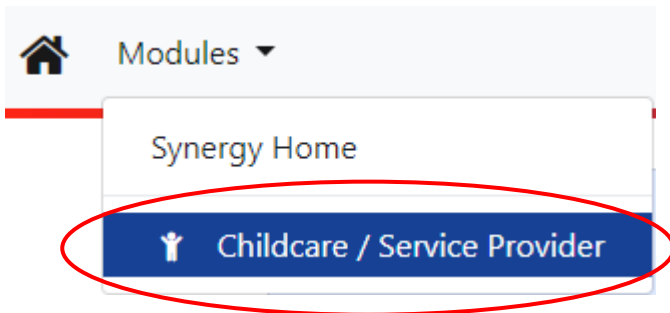
Confirm New Answer:

[Save](#)

- To return to the funding options select Modules :



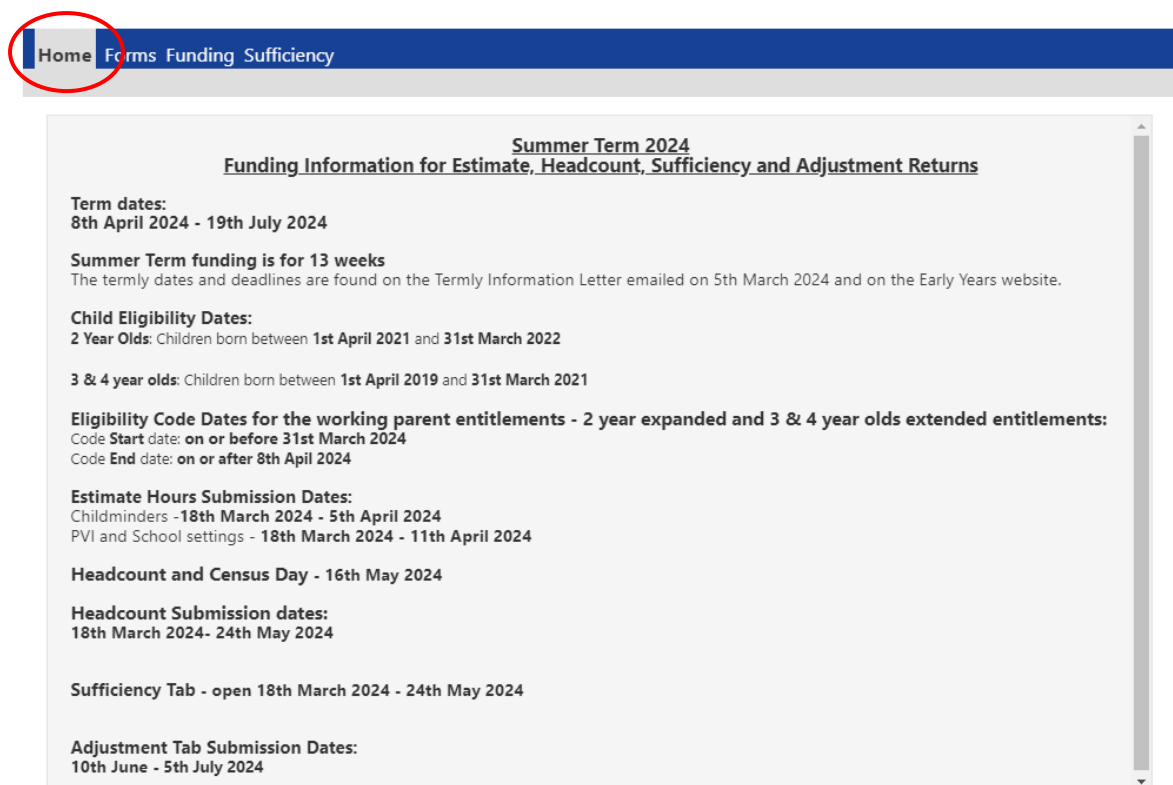
- Then select Childcare/Service Provider:



- You will be returned to the **Home** tab.

## 2. HOME TAB:

The Home tab will show the funding information for the current term, example:



The screenshot shows a navigation bar with 'Home', 'Forms', 'Funding', and 'Sufficiency' tabs. The 'Home' tab is selected and circled in red. Below the navigation bar, the page content is titled 'Summer Term 2024' and 'Funding Information for Estimate, Headcount, Sufficiency and Adjustment Returns'. The content includes the following information:

- Term dates:** 8th April 2024 - 19th July 2024
- Summer Term funding is for 13 weeks**  
The termly dates and deadlines are found on the Termly Information Letter emailed on 5th March 2024 and on the Early Years website.
- Child Eligibility Dates:**
  - 2 Year Olds:** Children born between 1st April 2021 and 31st March 2022
  - 3 & 4 year olds:** Children born between 1st April 2019 and 31st March 2021
- Eligibility Code Dates for the working parent entitlements - 2 year expanded and 3 & 4 year olds extended entitlements:**
  - Code Start date: on or before 31st March 2024
  - Code End date: on or after 8th April 2024
- Estimate Hours Submission Dates:**
  - Childminders - 18th March 2024 - 5th April 2024
  - PVI and School settings - 18th March 2024 - 11th April 2024
- Headcount and Census Day - 16th May 2024**
- Headcount Submission dates:** 18th March 2024- 24th May 2024
- Sufficiency Tab - open 18th March 2024 - 24th May 2024**
- Adjustment Tab Submission Dates:** 10th June - 5th July 2024

The following tabs used for funding will also be displayed:



The screenshot shows a navigation bar with 'Home', 'Forms', 'Funding', and 'Sufficiency' tabs. The 'Home' tab is selected.

- **FORMS** - the **Forms** tab is used to enter your Family Information Service (FIS) details and the Early Years Census in the Spring term (see page 85).
- **FUNDING** –the **Funding** tab is used to enter the Estimate hours, Headcount claim and Adjustments and funding Summary the funding that has been paid to the setting.
- **SUFFICIENCY**– This will not be visible to Childminders. This is used in the Summer term to enter the setting's place numbers and vacancies

### 3. FUNDING TAB:

The Funding tab is selected to access the following tabs:

**Estimates**

**Actuals – (Headcount claim)**

**Adjustments**

**Eligibility Checker**

**Summary** – a view of the funding that has been paid for the term

When the Funding Tab is selected, you are required to enter an answer to a Security Question. Please refer to **Authentication Questions** on page 7.

Home Forms **Funding** Sufficiency Staff

**Security question**

For increased security, you are being prompted to enter the answer to one of the Authentication Questions.

First pets name

Submit

The Funding tab will open with the following options:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

#### **Termly Funding Claim:**

The setting will be notified of the dates that the provider portal is 'open' to enter the Headcount submissions in the **Termly Information letter**. The opening date will usually be two weeks before the beginning of term.

**This process is set out in the order that is usually followed.** The information given is for a 3 & 4 year funding claim. A similar process is followed for the 2 year old funding entitlements which are covered in detail from page 46.

#### 3.1 Eligibility Checker tab

##### **Used to check the validity of eligibility codes**

When the parent completes the Working Parent Entitlements information on the Parental Declaration Form, the eligibility code will need to be checked using the **Eligibility Checker** tab.

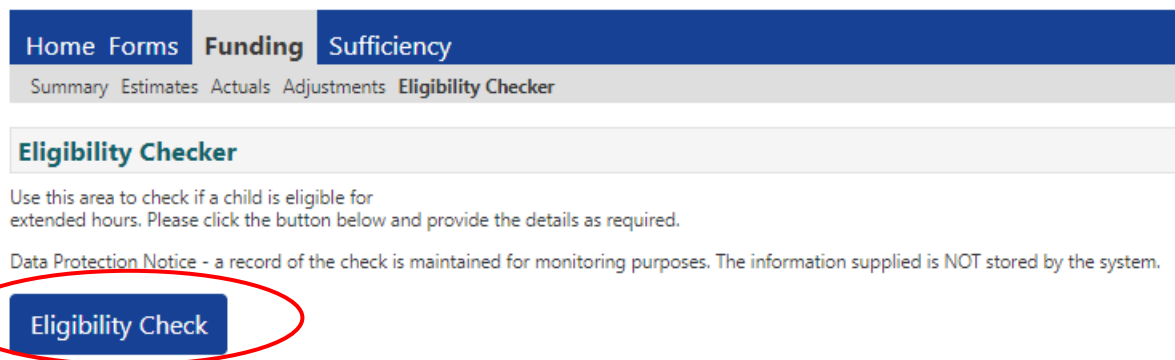
The Eligibility Checker tab is always available and can be used when the forthcoming term is not open and when the current term has closed.

## How to check Eligibility Codes using the Eligibility Checker:

- The Eligibility Checker tab is used to check that the Eligibility code given by the parent is valid and within the eligible dates for funding for the term
- The codes should be checked **before** the term starts to make sure that the code is eligible for funding for that term and **before** an offer of a funded place is made for the Extended hours
- Consent must be obtained to check the code using the Eligibility Checker, this should be obtained from the Eligibility code section of the Parental Declaration Form
- The 11 digit code issued to the parent by HMRC will start with either 50 or 11 for a temporary code. A code for a looked after child with working foster carers will start with 40
- Select Eligibility Checker:



- The following page will be displayed:



- Click on the **Eligibility Check** box. The following page will be displayed:

A screenshot of the 'Eligibility Check' form. The form has a blue header with the title 'Eligibility Check'. Below the header, there is a paragraph: 'Please enter a valid Eligibility Code and Child Date of Birth, together with Parent/Carer Details. Partner Details are optional but if entered then all fields, except Forename, must be filled in.' The form contains several input fields: 'Eligibility Code\*' (highlighted with a yellow box), 'Child Date of Birth\*', 'Parent/Carer Forename', 'Parent/Carer Surname', 'Parent/Carer NI Number\*', 'Partner Forename', 'Partner Surname', and 'Partner NI Number'. There is also a checkbox labeled 'Eligibility Check' with the text 'Consent must be given for this' above it. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. A note at the bottom left of the form states '\*denotes mandatory fields'.

- Enter the mandatory details marked with \* only and click **Submit**. **Do not enter the parent's Forename and Surname details.**
- If there is a **Found** result, a green tick bar will be displayed this will show that there is a match for the code details with HMRC. It **does NOT** guarantee that the code is eligible for funding in the selected term.
- **The code dates MUST be checked to make sure they meet the date criteria for that term as detailed in the Termly Information letter sent for the term.**

Home Forms **Funding** Sufficiency

Summary Estimates Actuals Adjustments **Eligibility Checker**

The details provided have been found:

Eligibility Code: 50104395168  
Code Start Date: 20-Feb-2024  
Code End Date: 16-Jun-2024  
Grace Period End Date: 31-Dec-2024

**Eligibility Checker**

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

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

**Eligibility Check**

- If there is a **Not Found** result, the following message will be displayed:

Home Forms **Funding** Sufficiency

Summary Estimates Actuals Adjustments **Eligibility Checker**

The details provided for Eligibility Code 50104395168 are not eligible for working family hours.

**Eligibility Checker**

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

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


**Eligibility Check**

This indicates that the details entered do not match with the application made with HMRC or the code has expired. You will need to obtain further information from the parent to confirm:

- **The child's date of birth**
  - **Parent's NI number**
  - **The Eligibility code number**
- If there are still problems, the parent will need to contact HMRC on the Customer Interaction Centre number: **0300 123 4097**.

### Validity Dates and the Grace Period

- Please make a note of the **Eligibility Code Start Date** and **Eligibility Code End Date** to keep track of when the code is valid from and when it expires.

 The details provided have been found:  
 Eligibility Code: 50104395168  
 Code Start Date: 20-Feb-2024  
 Code End Date: 16-Jun-2024  
 Grace Period End Date: 31-Dec-2024

**Eligibility Checker**

Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.  
 Data Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system.

Eligibility Check

- **DO NOT** rely on the Green tick. The Eligibility code **dates** will determine if the code is eligible for funding for the term
- Settings are advised to remind parents when **the validity end date** expires and prompt them to re-confirm their code at least **every 3 months**.
- Settings need to know the Grace period end date, which is when the funding will cease if the parent is no longer eligible or has not re-confirmed their code at the validity end date.

**Eligibility Code eligibility dates**

Refer to the Termly Information Letter for details of the eligibility code dates that can be accepted for the term.

*To be an eligible code for the term, the setting must make sure that a code has a **start** date before the end of the previous term and an **end** date after the start of the new term i.e.*

- *To be valid for the **Autumn term** a start date on or before 31<sup>st</sup> August and an end date on or after the start of the term date after 1st September*
- *To be valid for the **Spring term**, a start date on or before 31<sup>st</sup> December and an end date on or after the start of the term date after 1<sup>st</sup> January*
- *To be valid for the **Summer term**, a start date on or before 31<sup>st</sup> March and an end date on or after on or after the start of the term date 1st April*

*If a code has a **start** date dated on or after:*

- *1<sup>st</sup> September it will not be eligible for funding until the Spring Term, starting in January*
- *1<sup>st</sup> January it will not be eligible for funding until the Summer Term, starting in April*
- *1<sup>st</sup> April it will not be eligible for funding until the Autumn Term, starting in September*

**Warwickshire County Council does not have any discretionary funding and any request to fund a code dated outside of the DfE's criteria will be turned down, in all circumstances.**

**Exceptions to the standard criteria:**

*If a parent applied before the cut of date and the code's issue was delayed by HMRC, we can accept a temporary code starting with 11 dated up until 14<sup>th</sup> of September/April/January or a code starting with 50 with an issue after the deadline but with a start date by 14<sup>th</sup> of September/April/January.*

**Grace Period:**

*If a code is in its Grace period, a child can **continue** receiving the working parent entitlement funding until the end of the Grace period with the setting that has made the Headcount claim. If the Grace period falls in the following term, they can **only** continue to receive funding if it is with the same setting as the previous term.*

**A child cannot start a new setting or a new claim for the working parent entitlement funding if a code is in a Grace period.**

### 3.2 Estimates Tab

#### 1) Enter your Estimate hours:

The **Estimated hours** are used to calculate the **Interim payment**. To work out the Estimate hours to enter:

- Add up each child's **weekly** hours for each entitlement.
- 2 year olds – to include 2Help and the working parent entitlement (expanded hours)
- 3 & 4 year olds – to include universal hours and the working parent entitlement (extended hours)

#### How to calculate the weekly hours:

Examples:

If a setting is expecting to have 10 children attending for 15 hours per week, the calculation will be:

$$10 \text{ children} \times 15 \text{ hours} = \mathbf{150} \text{ hours to enter as the weekly hours}$$

If a setting is expecting to have 10 children attending for 30 hours per week (15 universal and 15 extended), the calculation will be:

$$10 \text{ children} \times 30 \text{ hours} = \mathbf{300} \text{ hours to enter as the weekly hours}$$

Or

If a setting is expecting to have 10 children attending of which there are **5 attending 15 hours, 3 at 10 hours and 2 at 6 hours per week**. To calculate the number of hours to enter:

$$5 \times 15 = 75$$

$$3 \times 10 = 30$$

$$2 \times 6 = 12$$

$$\text{Total weekly hours to enter: } 75 + 30 + 12 = \mathbf{117}$$

### \*Maintained Nursery Class or School

Note: For schools with a Governor run (s27) setting with children that are not within the class numbers (PAN), the numbers for each setting ie the nursery class and the s27 setting, need to be calculated and added separately. Select the correct setting from the 'Select Organisation' drop down box, the Governor run (s27) setting will show as 'SFGR'

- Enter the **total weekly hours** in the correct funding type for 2 year olds and 3 & 4 year olds

### How to enter Estimate Hours:

- Select Funding>Select Year and Term
- Select the correct term
- Select the correct funding type, the hours need to be entered **separately** for both the 3 & 4 Year Olds and 2 Year Olds (if applicable)
- Select the **Estimates** tab

2023/2024		Office use only	
Submission Period	Funding Type	Ready To Process	Processed
20-Feb-2024 to 12-Apr-2024	2 Year Olds		
	3 & 4 Year Olds		

- The following page will be displayed:

Submit Estimate: 2023/2024 Summer Term - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

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

- The number of weeks for the term is pre-populated **do not** change it.
- Enter the total number of **weekly** hours that the setting is expecting to claim for in the in the box circled:



Home Forms **Funding** Sufficiency

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2023/2024 Summer Term - 3 & 4 Year Olds 3 CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

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

**Note: Universal hours and Extended hours will need to be added together**

The hours entered in the example below are for 30 weekly hours.

- Click on calculate:

Home Forms **Funding** Sufficiency

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2023/2024 Summer Term - 3 & 4 Year Olds 3 CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term  There are 390.00 Hours in this Term

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

The system will calculate the termly hours for the term this is for information only, **DO NOT** change the number of Estimate hours to this value.

- Click on Send Claim:

Home Forms **Funding** Sufficiency

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submit Estimate: 2023/2024 Summer Term - 3 & 4 Year Olds 3 CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term  There are 390.00 Hours in this Term

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

When the claim has been successfully sent, the green tick bar will appear showing Submission Successful:

Home Forms **Funding** Sufficiency

Summary **Estimates** Actuals Adjustments Eligibility Checker

Submission Successful

Submit Estimate: 2023/2024 Summer Term - 3 & 4 Year Olds 3 CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term  There are 390.00 Hours in this Term

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

- When the funding office have accepted your Estimate hours, the Summary will be updated to show the Estimate hours your interim payment will be based on and the amount that you will be paid.
- Check that the details are correct. They can be changed up until the estimate submission deadline date:

Home Forms Funding Sufficiency																																																																																																									
Summary Estimates Actuals Adjustments Eligibility Checker																																																																																																									
Summary: 2023/2024 Summer Term - 3 & 4 Year Olds 3 CHANGE																																																																																																									
Rate x Hours may not equal Totals as rounding is applied per child. The totals shown are the sum of the funding amounts per child.																																																																																																									
<table border="1"> <thead> <tr> <th colspan="2">Estimates</th> <th colspan="2">Actuals</th> </tr> </thead> <tbody> <tr> <td>Term Length (Weeks)</td> <td>13.00</td> <td>Term Length (Weeks) Term Time</td> <td>13.00</td> </tr> <tr> <td>▶ Provider Rate applied</td> <td>£5.25</td> <td>▶ Provider Rate applied to child funding</td> <td>£5.25</td> </tr> <tr> <td colspan="2"><b>Estimate Funding</b></td> <td colspan="2"><b>Funding</b></td> </tr> <tr> <td>Hours Per Week</td> <td>30.00</td> <td>Funded Hours for Term</td> <td>390.00</td> </tr> <tr> <td>Term Funding Amount</td> <td>£2047.50</td> <td>Funding Amount @ Provider Rate</td> <td>£2047.50</td> </tr> <tr> <td>Interim %</td> <td>70.00%</td> <td></td> <td></td> </tr> <tr> <td>Interim Amount Payable</td> <td>£1433.25</td> <td></td> <td></td> </tr> <tr> <td colspan="2"><hr/></td> <td>Funding Amount</td> <td>£2047.50</td> </tr> <tr> <td>Total Interim Amount Paid to Date (before Adj)</td> <td>£0.00</td> <td colspan="2"><b>Extended Funding</b></td> </tr> <tr> <td></td> <td></td> <td>Funded Hours for Term</td> <td>0.00</td> </tr> <tr> <td></td> <td></td> <td>Funding Amount @ Provider Rate</td> <td>£0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Interim Amount Payable Balance</td> <td>£1433.25</td> <td>Extended Funding Amount</td> <td>£0.00</td> </tr> <tr> <td></td> <td></td> <td colspan="2"><b>Totals</b></td> </tr> <tr> <td></td> <td></td> <td>Funded Hours for Term</td> <td>390.00</td> </tr> <tr> <td></td> <td></td> <td>Funding Amount @ Provider Rate</td> <td>£2047.50</td> </tr> <tr> <td></td> <td></td> <td>Child Weightings</td> <td>£0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Processed</td> <td>No</td> <td>Term Funding Amount</td> <td>£2047.50</td> </tr> <tr> <td>Processed Date</td> <td></td> <td>Interim Amount Paid (before Adj)</td> <td>£0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Term Funding Amount Balance</td> <td>£2047.50</td> </tr> <tr> <td></td> <td></td> <td>Adjustments Paid with Final Payment</td> <td>£0.00</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td>Actual Amount Paid (Inc. Adj)</td> <td>£0.00</td> </tr> </tbody> </table>		Estimates		Actuals		Term Length (Weeks)	13.00	Term Length (Weeks) Term Time	13.00	▶ Provider Rate applied	£5.25	▶ Provider Rate applied to child funding	£5.25	<b>Estimate Funding</b>		<b>Funding</b>		Hours Per Week	30.00	Funded Hours for Term	390.00	Term Funding Amount	£2047.50	Funding Amount @ Provider Rate	£2047.50	Interim %	70.00%			Interim Amount Payable	£1433.25			<hr/>		Funding Amount	£2047.50	Total Interim Amount Paid to Date (before Adj)	£0.00	<b>Extended Funding</b>				Funded Hours for Term	0.00			Funding Amount @ Provider Rate	£0.00					Interim Amount Payable Balance	£1433.25	Extended Funding Amount	£0.00			<b>Totals</b>				Funded Hours for Term	390.00			Funding Amount @ Provider Rate	£2047.50			Child Weightings	£0.00					Processed	No	Term Funding Amount	£2047.50	Processed Date		Interim Amount Paid (before Adj)	£0.00							Term Funding Amount Balance	£2047.50			Adjustments Paid with Final Payment	£0.00							Actual Amount Paid (Inc. Adj)	£0.00
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### 3.3 Actuals tab – Headcount claim

#### 1. How to enter the termly Headcount:

The Headcount represents the actual children in attendance and the hours they attend the setting during the Headcount week. The Headcount week dates are shown in the Termly Information letter. A Parental Declaration Form (PDF) **must** be fully completed for all children entered in the Headcount claim.

- Select Funding > Actuals tab.
- Changes can only be made to the details if a term is available, it will show a green arrow as below:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Select Year and Term

2023/2024

Summer Term  
Submission Period: 20-Feb-2024 to 24-May-2024

- If the term is 'closed', the user will only have access to view their funding details and will not be able to make changes to the funding record. A closed term will have a no entry sign shown as below:

Home **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Actuals Head Count Records for 2023/2024 - Autumn Term

2023/2024

Autumn Term  
Submission Period: 10 Aug 2023 to 16 Oct 2023

2023/2023

Summer Term  
Submission Period: 20 Mar 2023 to 29 May 2023

Spring Term  
Submission Period: 12 Dec 2022 to 02 Feb 2023

Autumn Term  
Submission Period: 15 Aug 2022 to 17 Oct 2022

2021/2022

2020/2021

		Office use only	
Funding Type		Ready To Process	Processed
2 Year Olds			
3 & 4 Year Olds 3			

- Select the correct term and funding type:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Actuals Head Count Records for 2023/2024 - Summer Term

2023/2024

Summer Term  
Submission Period: 20-Feb-2024 to 24-May-2024

		Office use only	
Funding Type		Ready To Process	Processed
2 Year Olds			
3 & 4 Year Olds 3			

- If it is the first time of entering a claim or children have not been carried forward from the previous term, the page will appear as below:

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Or for 2 year olds:

Submit Actual: 2023/2024 Summer Term - 2 Year Olds CHANGE

- If the children have been carried forward from the previous term, a list of eligible children will be displayed with the funded hours that were claimed in the previous term:

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

In 30H grace period

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X		209.44	209.44	£2098.58		11-Nov-2022 - 21-Aug-2023 Grace Period: 31-Dec-2023
X		208.88	209.58	£2096.49		06-Dec-2022 - 11-Sep-2023 Grace Period: 31-Dec-2023
X		209.44	209.44	£2098.58		20-Aug-2022 - 16-Jun-2023 Grace Period: 31-Dec-2023
X		209.44	209.44	£2098.58		19-Oct-2022 - 12-Aug-2023 Grace Period: 31-Dec-2023
X		210.00	0.00	£1320.90	DFEYPP	
X		209.44	209.44	£2098.58		14-Mar-2023 - 20-Jun-2023 Grace Period: 31-Dec-2023
X		209.44	209.44	£2358.28	DF	18-Aug-2022 - 14-Sep-2023 Grace Period: 31-Dec-2023
X		208.88	210.00	£2098.59		27-Aug-2022 - 14-Sep-2023 Grace Period: 31-Dec-2023

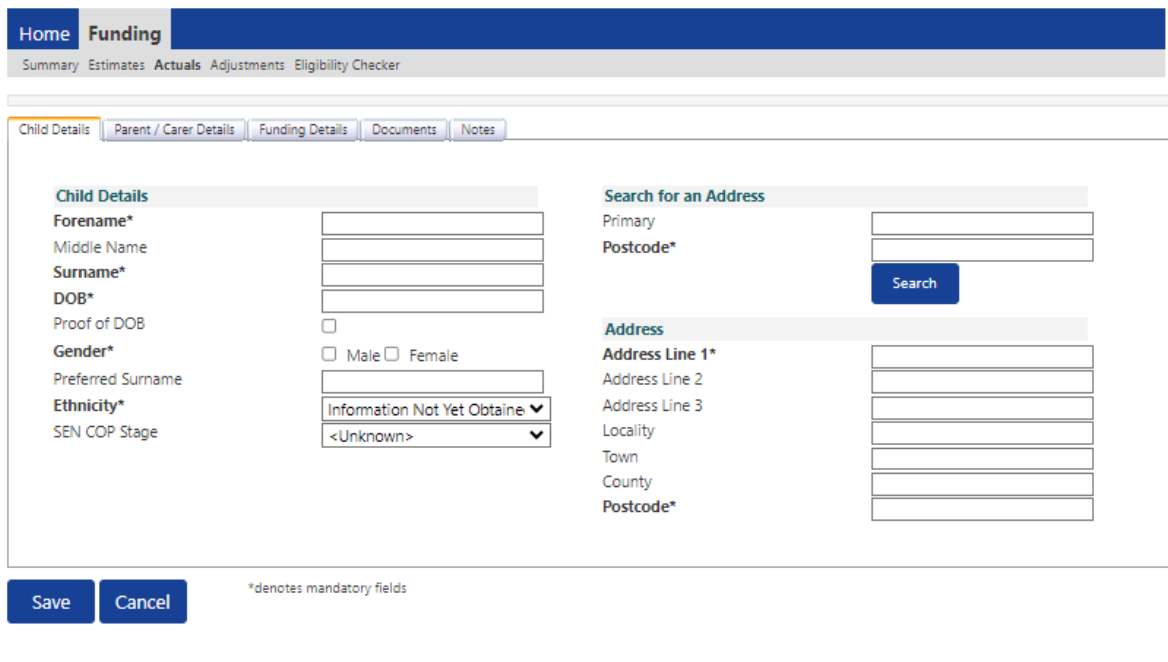
### 3.4 How to Add a New Child for 3 & 4 year old funding entitlements

**Note: Do not click on Save until every tab has been completed as required**

- Select:



The following page will appear. There are 5 tabs, complete each tab in turn, do not select Save until all tabs have been completed, where necessary:



The screenshot shows the 'Funding' page in the FIS Provider Portal. The page has a blue header with 'Home' and 'Funding' tabs. Below the header is a navigation bar with 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main content area has five tabs: 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Documents', and 'Notes'. The 'Child Details' tab is active and contains two main sections: 'Child Details' and 'Search for an Address'. The 'Child Details' section has fields for Forename\*, Middle Name, Surname\*, DOB\*, Proof of DOB (checkbox), Gender\* (radio buttons for Male and Female), Preferred Surname, Ethnicity\* (dropdown menu with 'Information Not Yet Obtained' selected), and SEN COP Stage (dropdown menu with '<Unknown>' selected). The 'Search for an Address' section has fields for Primary, Postcode\*, and a 'Search' button. Below these sections are 'Address' fields: Address Line 1\*, Address Line 2, Address Line 3, Locality, Town, County, and Postcode\*. At the bottom of the form are 'Save' and 'Cancel' buttons, and a note: '\*denotes mandatory fields'.

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FIS Provider Portal - Part of the Synergy FIS Suite

#### 1. Child Details tab

- Complete all mandatory fields marked with \*, using the information from the Parental Declaration Form (PDF).
- The child's name MUST be accurate and their **legal** name entered as shown on their Birth Certificate. We are required to hold up to date and accurate information for children as we also share the database with other Local Authority services.
- Select the child's ethnicity from the drop down box. **DO NOT** leave as Information Not Yet Obtained

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

**Child Details**

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

**Search for an Address**

Primary  
Postcode\*  
Search

**Address**

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

Save Cancel

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- Select the correct SEN COP Stage by clicking on the drop down box, see below:

SEN options to select from are:

- No special Educational need
- Education Health and Care Plan
- SEN Support

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

**Child Details**

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

**Search for an Address**

Primary  
Postcode\*  
Search

**Address**

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

Save Cancel

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## 2. Parent/Carer details tab:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

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

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for 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.

**Parent / Carer Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

**Partner Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

Save Cancel \*denotes mandatory fields

- This will need completing when you are adding an Eligibility code for Working Family Eligibility or claiming EYPP.
- A signed consent on the Parental Declaration Form (PDF) from the parent/carer MUST be obtained before entering details here, as their details will be checked against the Government's Eligibility Checking Service (ECS) for eligibility for these entitlements.
- **Claim for the working parent entitlement for 3 & 4 year olds (30 hours) – (Extended Funding)**

If a parent is claiming for the working parent entitlement for 3 & 4 year olds (30 hours) funding, the information in Section 2 of the PDF showing the **working parent extended 15 hours entitlement** will need to be add into the Parent/Carer Details tab see below:

<input type="checkbox"/>	<b>Working Parent Expanded 15 hours entitlement for 2 year olds*</b>
<input type="checkbox"/>	<b>Universal 15 hours entitlement for 3 &amp; 4 year olds</b>
<input type="checkbox"/>	<b>Working Parent Extended 15 hours entitlement for 3 &amp; 4 year olds*</b>
*For the <b>Working Parent entitlements</b> from the term following the child's 2nd birthday, with a valid <b>eligibility code issued by HMRC</b> , the <u>term before</u> they are due to access a funded place. The eligibility code is to be reconfirmed every 3 months. If you do not have a valid code for the term, you will be liable to pay for any additional hours accessed where the provider is unable to claim funding using the eligibility code. <b>Please complete the information below:</b>	
*Parent / Carer Forename and Surname:	*Parent / Carer National Insurance Number:
<input type="text"/>	<input type="text"/>
*Eligibility Code (11 digit number starting with 50)	
<input type="text"/>	

The **Working Family Eligibility** box must be ticked:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for 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.

**Parent / Carer Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

**Partner Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

Save Cancel \*denotes mandatory fields

- **Claims for EYPP - Early Years Pupil Premium:**

EYPP will be added to a child's claim if the parent meets the eligibility criteria, shown in the EYPP section of the Parental Declaration Form (PDF). This will be checked using the Government's ECS check after the Headcount has been sent to the Early Years Funding Team.

**Early Years Pupil Premium (EYPP)**

The Early Years Pupil Premium (EYPP) gives providers additional funding to support some pupils. Children with EYPP will have a higher priority when applying for a school place where a school is oversubscribed.

For more details visit: [www.warwickshire.gov.uk/childcarecosts](http://www.warwickshire.gov.uk/childcarecosts)

**Q1: Family Income and Benefits**

Is your gross household income below £16,190 and you are in receipt of benefits (not Working Tax credit) or Is your Net income below £7,400 and you receive Universal Credits?

YES  NO

A claim for EYPP will not affect your claim for benefit or credits

If you have ticked YES, please complete the following section:

*Parent / Carer Surname:	*Parent / Carer Forename:	*Parent / Carer Date of Birth:	*Parent / Carer National Insurance No or NASS Reg No:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Tick the **EYPP** eligibility check consent box .



Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for 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.

Parent / Carer Details		Partner Details	
Forename	<input type="text"/>	Forename	<input type="text"/>
Surname	<input type="text"/>	Surname	<input type="text"/>
DOB	<input type="text"/>	DOB	<input type="text"/>
Email	<input type="text"/>	Email	<input type="text"/>
Contact Number	<input type="text"/>	Contact Number	<input type="text"/>
<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>
Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility	Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility

\*denotes mandatory fields

### Checks made for EYPP - Eligibility Checking Service (ECS)

- When the Headcount claim is submitted, the parent/carer details are processed through the Government's Eligibility Checking Service (ECS) to establish if they meet the criteria. If the parent is eligible, the EYPP weighting will be added to the child's record and show in the Weightings column.
- For those children where EYPP has not been allocated, it will mean that eligibility using the ECS was 'Not Found' or 'No Trace-Not Found-Check Data'.
- If you were expecting EYPP to be added and it is not showing in the **Weightings** column, check with the parent that the details you have been given are correct. If the parent believes that they meet the eligibility criteria, additional supporting information to confirm this will need to be sent to the Early Years Funding Team. **See EYPP eligibility criteria on the Parental Declaration Form (PDF)**. The additional information should be sent using the **Documents** facility on the provider portal (see page 29).

### EYPP for Adopted children and Special Guardianship/ Child Arrangement Orders

- For children who have been Adopted, left care through Special Guardianship or Child Arrangement Orders, their eligibility will not be recognised by the ECS check.
- The Early Years Funding Team will need to see evidence of their Adoption Birth Certificate, Special Guardianship or Child Arrangement Orders. This should be sent to us, during the Headcount period, using the **Documents** tab see page 28.
- When the Early Years Funding Team is satisfied with this supporting information, they will add the child's EYPP eligibility to their record.

- EYPP will automatically be added for Warwickshire’s Looked After Children (LAC). For LAC from other authorities, please send supporting information using the Documents tab.

### 3. Funding Details tab:

- Complete all mandatory fields marked with \*
- Click on Default Term Dates, the term dates will automatically pre-populate:

- Add the number of Weeks attended. These are the standard funded weeks, regardless of how many weeks there are in the ‘school term’. The standard term dates should only be changed for providers who are open for less than 38 weeks, e.g. Independent schools. The standard number of weeks in each term are:
  - Autumn term - 14 weeks
  - Spring term – 11 weeks

- Summer term – 13 weeks

**Funding Details**

Start Date\*

End Date\*

**Default Term Dates**

Weeks Attended in Term\*

- The number of weeks for the term are also shown in the red box as below:

Maximum Values Allowed:	
Number of Weeks:	13.00
Funded Weekly Hours:	15.00
Funded Termly Hours:	195.00
Funded Yearly Hours:	570.00
Extended Weekly Hours:	15.00
Extended Termly Hours:	195.00
Extended Yearly Hours:	570.00

- The **Present during Census** box will automatically be ticked for new children added but **MUST** be ticked for all children attending during Headcount week in the **Spring term** for Census purposes.

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

**Funding Details**

Start Date\* 08-Apr-2024

End Date\* 19-Jul-2024

**Default Term Dates**

Weeks Attended in Term\*

Present during Census

Attends Two Days or More

Nominated for DAF\*  Yes  No

#### 4. Disability Access Fund

- **Nominated for DAF** (Disability Access Fund) option. Only select the DAF button if the parent has completed the DAF (Disability Access Fund) section of the PDF and can give a copy of the **DLA** (Disability Living Allowance) award letter to the setting.

Additional Entitlements:	
<b>Disability Access Fund (DAF)</b>	
For children in receipt of child Disability Living Allowance (DLA) and receiving the funded Early Education entitlement. DAF is paid to the child's nursery as a fixed annual rate, as notified by the Local Authority, each calendar year.	
Please tick if your child is receiving DLA    YES <input type="checkbox"/> NO <input type="checkbox"/>	
<b>If you have ticked Yes, you must provide a copy of the DLA Award letter to your early years provider.</b>	
If your child is splitting their funded Early Education entitlement across two or more providers, please nominate the setting where the local authority should pay DAF	
*Name of Provider	

- This letter will need to be sent to us using the **Documents** tab see page 28. The payment will not be confirmed unless this letter is seen by the Early Years Funding Team.

The screenshot shows the 'Funding Details' tab with the following fields:

- Start Date\*: 08-Apr-2024
- End Date\*: 19-Jul-2024
- Default Term Dates (button)
- Weeks Attended in Term\*: 13
- Present during Census:
- Attends Two Days or More:
- Nominated for DAF\***:  Yes  No

### **DAF (Disability Access Fund):**


A child can receive DAF if they are in receipt of Disability Living Allowance (DLA) and wish to take up an early education place.

The parent/carer will need to complete the **Disability Access Fund (DAF)** section of the Parental Declaration Form (PDF) by ticking the **Yes** box and nominate the childcare provider who is to receive the one-off yearly payment if they attend more than one setting.

Children do not have to take up the full 570 hours of early education to receive full DAF payment.

- **Enter Funded and Non Funded hours**

Taking the details from **Part 3** of the Parental Declaration Form (PDF), enter the number of hours your setting is claiming. A number **MUST** be entered even if it is a zero 0 value.

<p><b>Funded Hours per Week</b></p> <p>Hours* <input type="text"/></p> <p><b>Extended Funded Hours per Week</b></p> <p>Extended Hours* <input type="text"/></p> <p>Eligibility Code <input type="text"/></p> <p><input type="checkbox"/> Eligible for Extended Hours</p> <p><b>Total Funded Hours per Week</b></p> <p>Total Funded: <input type="text"/></p>	<p><b>Non-Funded Hours per Week</b></p> <p>Non-Funded Hours* <input type="text"/></p> <p> 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</p> <div style="border: 1px solid red; padding: 5px; background-color: #ffe6e6;"> <p><b>Maximum Values Allowed:</b></p> <p>Number of Weeks: <b>13.00</b></p> <p>Funded Weekly Hours: <b>15.00</b></p> <p>Funded Termly Hours: <b>195.00</b></p> <p>Funded Yearly Hours: <b>570.00</b></p> <p>Extended Weekly Hours: <b>15.00</b></p> <p>Extended Termly Hours: <b>195.00</b></p> <p>Extended Yearly Hours: <b>570.00</b></p> </div>
--	---

- **Split Funding (the child is attending more than one setting) - claiming the correct hours for Universal and Extended hours**

If a child's funding is to be split between more than one setting, the parent must nominate how the funded hours are to be split. The split of hours must be entered on the Parental Declaration Form (PDF) stating which provider is to claim the Universal hours and which provider is to claim the Extended 30 hours, or a mix of both.

Settings cannot claim more than the maximum entitlement limit for each funding entitlement option (Universal or Extended). If this happens a duplicate claim will be highlighted at the funding office, the claim will not be accepted until it has been agreed between all settings on how the funding is to be split.

- **Stretch:**

If the *Stretch* model is being offered, the number of hours per week must be entered on the portal **as the equivalent of 38 weeks**.

e.g. if the offer is 10 funded hours over 51 weeks the calculation would be:

10 hours x 51 weeks = 510 hours per year, divide by 38 weeks = 13.42 hours - the equivalent of 38 weeks. (See the calculation in the Funding section, in **Part 2**, of the Parental Declaration Form (PDF)).

**Please refer to the Stretch Guidance for further details, a copy can be found in the Guidance of Early Education Funding Entitlements 2024 page 38.**

- **Eligibility Check for Working Parent Entitlement for 3 & 4 year olds (30 hours):**

The Eligibility code details should have been checked using the Eligibility Checker tab to establish its eligibility for funding (see section 3.1 page 10) **before** the 30 hour funded place is offered. **The Funding Details tab is not linked to the Eligibility Checker tab**, another check must be made.

If Extended hours have been added, the Eligibility code number will need to be entered

as shown below and then click on the  button below the code number.

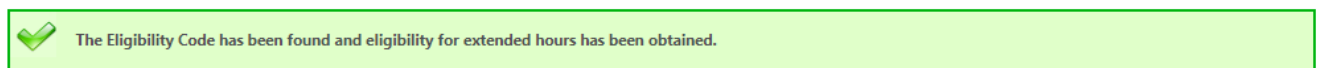
This will perform an eligibility check on the 30 hour code within the Funding Details tab:

The screenshot shows the 'Funding Details' tab with several input fields and a 'Check Eligibility Code' button. The 'Eligibility Code' field contains '50112345689' and is circled in red. Below it is a 'Check Eligibility Code' button, also circled in red. To the right, a red box displays 'Maximum Values Allowed' with the following data:

Maximum Values Allowed:	
Number of Weeks:	13.00
Funded Weekly Hours:	15.00
Funded Termly Hours:	195.00
Funded Yearly Hours:	570.00
Extended Weekly Hours:	15.00
Extended Termly Hours:	195.00
Extended Yearly Hours:	570.00

Other fields include 'Funded Hours per Week', 'Non-Funded Hours per Week', 'Extended Hours\*', 'Eligibility Code', 'Eligible for Extended Hours', and 'Total Funded:'. A 'Save' and 'Cancel' button are at the bottom left. A note '\*denotes mandatory fields' is at the bottom center.

If the code is eligible for funding for the term, the following will be displayed:



If the code is not eligible for funding because it has not got the correct validity dates for the term or the details entered for the code do not match with HMRC's, the following will be displayed:



If this appears, check the code in the separate Eligibility Checker to check the **validity dates** of the code. Also check that the details entered for the child in the Child Details tab and Parent/Carer Details tab are correct, it is often the child's date of birth that is wrong.

## 5. Documents tab

The screenshot shows the 'Documents' tab selected in a navigation bar. The main area is titled 'Supporting Documents' and contains instructions: '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.' Below this is a table with columns 'Description\*' and 'File Name', and an 'Upload a file' button. The table currently shows 'No Documents Uploaded'. At the bottom, there are 'Save' and 'Cancel' buttons and a note '\*denotes mandatory fields'.

- Use the Documents tab facility when you need to provide supporting information for:

- **DAF** - when the 'Yes' for DAF has been ticked, the supporting Disability Living Allowance (DLA) award letter will need to be sent using the 'Documents' tab
  - **EYPP** is being claimed for an Adopted child or a child with Special Guardianship SGO or Child Arrangement CAO. Copies of the Adoption Birth Certificate or relevant Court Orders will need to be sent to support the application using the 'Documents' tab.
  - **2 Year olds** eligibility confirmation for funding, issued by an outside LA
- The facility is only available during the Headcount and the Adjustment period when the portal is **open** for submissions.
  - The document will need to be added into a secure file on the setting's device to attach the file into Documents.

**Note:** Any other documents or information must **not** be attached unless specifically requested. Only send the stated documents as supporting information for the purpose of verifying the child's funding claim for DAF, EYPP or 2 Year funding.

- **Click on Upload a file** and select the correct document from the setting's files.

Home Forms Funding Sufficiency Staff

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

**Supporting Documents**  
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.  
Allowed file types are: All file types permitted  
Files may not be larger than 999 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel \*denotes mandatory fields

- Type a description of the document attached:

Child Details Parent / Carer Details Funding Details Documents Notes

**Supporting Documents**  
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.  
Allowed file types are: All file types permitted  
Files may not be larger than 999 MB.

Description*	File Name	Upload a file
DLA award letter	Copy of tmp16C6.xlsx	Delete

Save Cancel \*denotes mandatory fields

- Click on **'Save'**
- If a document is to be deleted, click on **Delete** and it will be removed.
- Add a note to the **Notes tab** to highlight that a document has been added.

## 6. Notes tab

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

Add a new note

Notes History

Save Cancel \*denotes mandatory fields

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FIS Provider Portal - Part of the Synergy FIS Suite

- **Only** use the **Notes** tab to advise us if a document has been sent to support DAF, EYPP or 2 year funding using the Documents tab or to notify us of any children who should be attending the setting for funded hours; but are not attending due to **unauthorised absence or left unexpectedly**.

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

Add a new note

Notes History

DLA award letter added added to Documents  
EYPP Supporting Information added to Documents  
Child left setting without notice

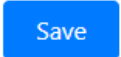
Save Cancel \*denotes mandatory fields

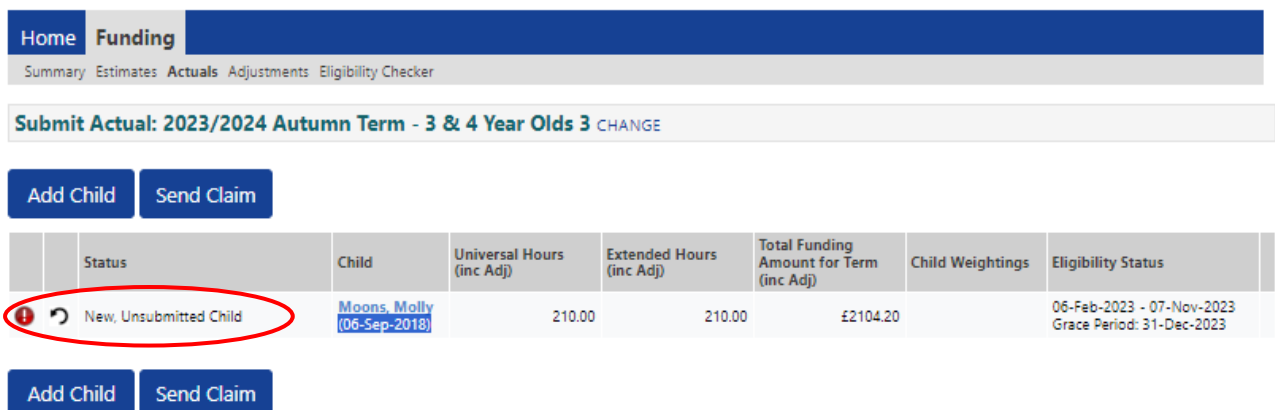
**IMPORTANT NOTE:** The Notes tab should not be used for any information other than stated above. Other information regarding your headcount claim must be sent by email to [eyfunding@warwickshire.gov.uk](mailto:eyfunding@warwickshire.gov.uk) .



- We do not read the messages sent using the Notes tab until after the Headcount submission deadline date. We will not pick up messages relating to your headcount claim during the submission period.

## 7. Select Save

- When all of the required tabs have been completed, click on . The status of the child entered will show on the 'Actuals' list as 'New, Unsubmitted Child':

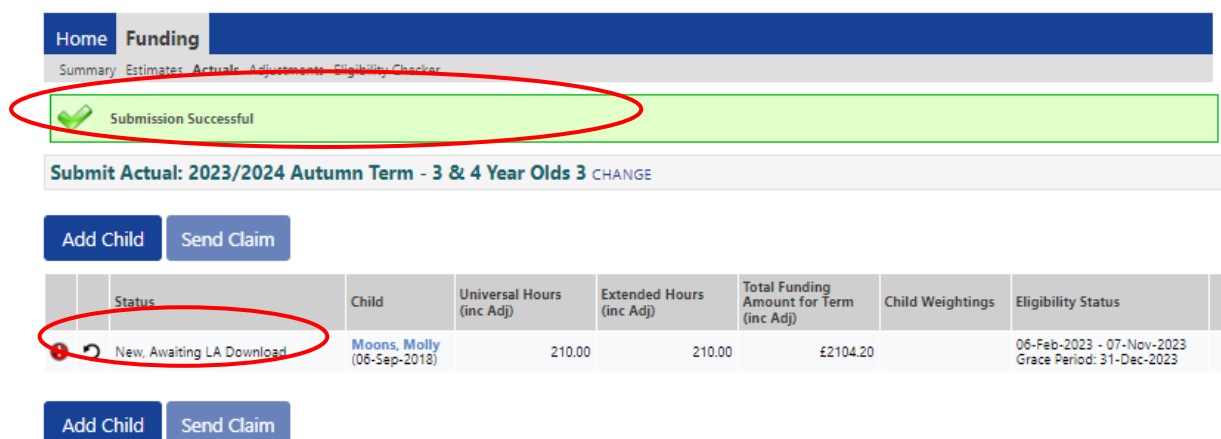


The screenshot shows the 'Actuals' tab selected in the 'Funding' section. A table lists child entries. The first entry is highlighted with a red circle:

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Unsubmitted Child	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Continue adding new children as required.

- Select Send Claim**
  - When all children have been added click on **Send Claim** the green tick line will appear.



The screenshot shows the 'Actuals' tab with a green success message highlighted by a red circle:

Submission Successful

Below the message, the table shows the child's status updated:

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Awaiting LA Download	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

- The children's status is then displayed as 'New, Awaiting LA Download'
- When the LA have accepted the claim, the listed children will show with a cross next to their name:

Home **Funding**


Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- Changes can still be made or new children added after the initial submission up until the notified submission deadline date. If any changes are made, **ALWAYS** remember to click on **'Send Claim'**.
- If the claim is not submitted it will not be received by the LA and funding will not be paid. A red exclamation mark will be displayed on the first page and next to the child's name in the Actuals list.  to show that the child's claim has not been submitted.

  3 & 4 Year Olds 3

- Refer to 3.8 page 38 - Unsubmitted Claims

### 3.5 How to Update and Edit the Actuals list

#### 1. Select Actuals

- If the eligible funded children from the previous term have been carried forward to the current term, a list of these children will appear in the 'Actuals' list.
- Children's details are carried forward from the previous term for the Spring and Summer term Headcounts and for some settings, from Summer to Autumn term (except for Childminders).
- Always** check the list of children to make sure that they are all included and that their hours are correct, particular attention should be made to:
  - Extended (30 hours), these hours are not brought forward if the code is in a grace period which expired at the end of the previous term.
  - Hours added as an Adjustment in the previous term.
- If there are children carried forward, they will be listed when the Actuals tab is selected for the term:

Home **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- There will be a cross next to the child's name, this is how the list will appear before any changes are made and after changes have been accepted i.e. the 'status quo'.
  - The 'Child Details' tab **MUST** be checked to make sure that child's details are correct and up to date. We are required to hold up to date and accurate information for children as we share the database with other Local Authority services. Any changes for example, change of address or incorrect spelling of a child's name, must be updated as part of the Headcount process or notified to us by email as soon as possible.
- Double click on the child's name:



- The details carried forward from the previous term will be shown starting with the Summary tab:

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Name: Molly Moons DOB: 06-Sep-2018

Summary Child Details Parent / Carer Details Funding Details Documents Notes

Term Start Date	04-Sep-2023	<b>Universal Funding</b>	
Term End Date	22-Dec-2023	Funded Hours Per Week	15.00
No of weeks attended	14.00	Funded Hours for Term	210.00
Nominated for DAF	No		
30H Eligibility Start Date	06-Feb-2023	<b>Funding Amount @ Provider Rate</b>	<b>£1052.10</b>
30H Eligibility End Date	07-Nov-2023	<b>Child Weightings</b>	<b>£0.00</b>
30H Grace Period End Date	31-Dec-2023		
30H Eligibility last checked	10-Aug-2023 17:00:21	<b>Universal Funding Amount</b>	<b>£1052.10</b>
▶ Provider Total Rate	£5.01	<b>Extended Funding</b>	
		Funded Hours Per Week	15.00
		Funded Hours for Term	210.00
		<b>Funding Amount @ Provider Rate</b>	<b>£1052.10</b>
		<b>Child Weightings</b>	<b>£0.00</b>
		<b>Extended Funding Amount</b>	<b>£1052.10</b>
		<b>Totals</b>	
		Funded Hours Per Week	30.00
		Funded Hours for Term	420.00
		<b>Total Funding (excl. Adj)</b>	<b>£2104.20</b>
		Total amount from Adjustments	£0.00
		Total amount from Pending Adjustments	£0.00
		<b>Total Funding For Term (inc Adj)</b>	<b>£2104.20</b>

Save Cancel \*denotes mandatory fields

- Check the details on each tab in turn:
  - Child Details
  - Parent/Carer Detail
  - Funding Details
  - Documents
  - Notes
- Make changes as required.
- Once all tabs have been checked and the edits made,
- Select **Save**.
- Continue by checking all children's details.

### 3.6 How to Delete a Child

- Select 'Actuals', the list of children currently funded at the setting will appear. If a child is to be deleted, click on the cross next to the child's name as shown below:

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- The following will be displayed:

Organisation: Stacey Lambert  
Provider: Lambert, Stacey (Childminder)

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

**Request Delete**

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

FIS Provider Portal - Part of the Synergy FIS Suite

- To continue with deleting the child, click on 'Yes' as above.
- The list of children will then appear, 'Awaiting LA Deletion' will appear next to the child.:

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
Awaiting LA Deletion	Moons, Molly (06-Sep-2018)	0.00	0.00	£0.00		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- 'When the Early Years Funding Team has accepted the request, the child will disappear from the list of children:

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Add Child Send Claim

### 3.7 Send Claim:

**It is very important that this is not forgotten!**

- When your Headcount has been completed with the required changes made to the existing children and any new children have been added, click on '**Send Claim**'.

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Unsubmitted Child	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- When the claim is successfully sent, the green tick line will be shown.
- The status will change to New, Awaiting LA Download if new children have been added:

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submission Successful

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

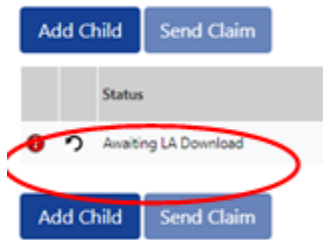
Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
New, Awaiting LA Download	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

Or

- 'Awaiting LA Download' if the details of an existing child have been edited:



**Note:** If a child has not been added or the Headcount edited, the **Send Claim** button will not be live. To make it live, click on a child's name to **Edit** and **Save**.

Home **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

### 3.8 Unsubmitted Claims

- If the **Send Claim box** is **not** clicked before the submission deadline date, the claim will **not** be imported to the LA database and processed by the Early Years Funding Team.
- A warning will be displayed to notify of an outstanding unsubmitted claim:

Home **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker

Summary Head Count Records for 2023/2024 - Autumn Term

Year	Funding Type
2023/2024	
Autumn Term	
2022/2023	2 Year Olds
2021/2022	3 & 4 Year Olds 3
2020/2021	
2019/2020	
2018/2019	
2017/2018	


- This is also shown on the first page when 'Actuals' is selected:

Home **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim


Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
 New, Unsubmitted Child	<a href="#">Plant, Rose</a> (05-Oct-2019)	210.00	0.00	£1052.10		


Add Child Send Claim

- They will also show in **Notifications** on the **HOME** page

**Notifications**

These records have been edited but not yet claimed.

 There are unsubmitted child funding records for Provider

 2023/2024 Autumn Term - 3 & 4 Year Olds 3 (1 unsubmitted, 0 rejected)

- When the **Adjustment tab** opens later in the term, the child will need to be deleted from the Actual list and added as a new entry to the Adjustment tab using **Add Child**

### 3.9 Check Claim

**NOTE: It is very important that any changes are highlighted to the Early Years Funding Team in the current term as we will not be able to make an Adjustment once the term has ended.**

- Check the **Actuals** list to make sure that all the children being claimed funding for appear on the list, the additions and changes to the children's details have been recorded correctly and the hours that the setting are expecting to be paid for are correct.
- Login to the Provider Portal
- Select **Funding** Tab
- Select **Actuals**
- Select the required term
- If the term is '**open**' for submissions it will show as:



Select Year and Term

2023/2024  
 Autumn Term  
 Submission Period:  
 10 Aug 2023 to 16 Oct 2023

2022/2023

- Changes can still be made, making sure that the **Send Claim** is 'clicked' once any changes have been made.
- If the term is '**closed**' for submissions it will show as:

2022/2023  
 Summer Term  
 Submission Period:  
 20 Mar 2023 to 29 May 2023

Spring Term  
 Submission Period:  
 12 Dec 2022 to 02 Feb 2023

Autumn Term  
 Submission Period:  
 15 Aug 2022 to 17 Oct 2022

- If the term is closed, changes cannot be made on the Actual tab. All details for that term will be 'frozen'.
- If the Headcount submission deadline date has passed, changes can be made when the **Adjustment tab** is open, usually 3 weeks after the Headcount submission deadline date refer to **Section 6 page 57**.
- Check the list of funded children to make sure that it is complete and the hours that are being claimed for are correct.

Submit Actual: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE

Add Child Send Claim

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
X	Moons, Molly (06-Sep-2018)	210.00	210.00	£2104.20		06-Feb-2023 - 07-Nov-2023 Grace Period: 31-Dec-2023

Add Child Send Claim

- Check the **Child Weightings** column to see if any weightings have been applied:

Status	Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status

Child Weightings

DF,EYPP

- If the setting applied for EYPP (Early Years Pupil Premium) this should show in the **Child Weightings** column as **EYPP**. If EYPP has not been added as expected, please contact the Early Years Funding Team on [eyfunding@warwickshire.gov.uk](mailto:eyfunding@warwickshire.gov.uk)

Child Weightings

EYPP

- If a **DF (Deprivation Factor)** weighting has been added, this means that the child's postcode falls within the 30% most deprived areas as identified by the IDACI scale.

Child Weightings

DF

### 3.10 Summary Tab - child details

From the list of children, double click on an individual child's name, their Summary tab will appear.

This shows a breakdown of the hours and funding the setting will receive for that child:

Summary		Child Details	Parent / Carer Details	Funding Details	Documents	Notes
<b>Term Start Date</b>	03-May-2021					
<b>Term End Date</b>	21-Jul-2021					
<b>No of weeks attended</b>	11.00					
<b>Nominated for DAF</b>	No					
<b>30H Eligibility Start Date</b>	26-Jan-2021					
<b>30H Eligibility End Date</b>	22-May-2021					
<b>30H Grace Period End Date</b>	31-Aug-2021					
<b>30H Eligibility last checked</b>	01-Apr-2021 12:22:29					
<b>▶ Provider Total Rate</b>	£4.15					
		<b>Universal Funding</b>				
		Funded Hours Per Week				15.00
		Funded Hours for Term				165.00
		<b>Funding Amount @ Provider Rate</b>				<b>£684.75</b>
		<b>▶ Child Weightings</b>				<b>£174.90</b>
		<b>Universal Funding Amount</b>				<b>£859.65</b>
		<b>Totals</b>				
		Funded Hours Per Week				15.00
		Funded Hours for Term				165.00
		<b>Total Funding (excl. Adj)</b>				<b>£859.65</b>
		Total amount from Adjustments				£0.00
		Total amount from Pending Adjustments				£0.00
		<b>Total Funding For Term (inc Adj)</b>				<b>£859.65</b>

Close \*denotes mandatory fields

- **Child Weightings:** If a child is eligible for EYPP and/or DF funding the details will show as below:

Summary		Child Details	Parent / Carer Details	Funding Details	Documents	Notes
<b>Term Start Date</b>	03-May-2021					
<b>Term End Date</b>	21-Jul-2021					
<b>No of weeks attended</b>	11.00					
<b>Nominated for DAF</b>	No					
<b>30H Eligibility Start Date</b>	26-Jan-2021					
<b>30H Eligibility End Date</b>	22-May-2021					
<b>30H Grace Period End Date</b>	31-Aug-2021					
<b>30H Eligibility last checked</b>	01-Apr-2021 12:22:29					
<b>▶ Provider Total Rate</b>	£4.15					
		<b>Universal Funding</b>				
		Funded Hours Per Week				15.00
		Funded Hours for Term				165.00
		<b>Funding Amount @ Provider Rate</b>				<b>£684.75</b>
		<b>▶ Child Weightings</b>				<b>£174.90</b>
		<b>Universal Funding Amount</b>				<b>£859.65</b>
		<b>Totals</b>				
		Funded Hours Per Week				15.00
		Funded Hours for Term				165.00
		<b>Total Funding (excl. Adj)</b>				<b>£859.65</b>
		Total amount from Adjustments				£0.00
		Total amount from Pending Adjustments				£0.00
		<b>Total Funding For Term (inc Adj)</b>				<b>£859.65</b>


Close \*denotes mandatory fields

- If there is a claim for the **Disability Access Fund (DAF)** for a child, the DAF premium will show as an Adjustment:

Summary		Child Details	Parent / Carer Details	Funding Details	Documents	Notes
Term Start Date	17-Apr-2023					
Term End Date	25-Jul-2023					
No of weeks attended	13.00					
Nominated for DAF	Yes					
▶ Provider Total Rate	£4.54					
		<b>Universal Funding</b>				
		Funded Hours Per Week 15.00				
		Funded Hours for Term 195.00				
		<hr/>				
		Funding Amount @ Provider Rate £885.30				
		Child Weightings £0.00				
		<hr/>				
		Universal Funding Amount £885.30				
		<b>Totals</b>				
		Funded Hours Per Week 15.00				
		Funded Hours for Term 195.00				
		<b>Total Funding (excl. Adj) £885.30</b>				
		Total amount from Adjustments £828.00				
		Total amount from Pending Adjustments £0.00				
		<hr/>				
		<b>Total Funding For Term (inc Adj) £1713.30</b>				
		<hr/>				

Close

\*denotes mandatory fields

- The amount will show in **Pending Adjustments** if we have not seen the required DLA award letter via **Documents** and have not accepted the adjustment.
- The paperclip symbol will show in the child's line to indicate that the document was attached 


### 3.11 Eligibility Codes in their Grace period:

- If the Eligibility code entered for a child has not been re-confirmed by its validity end date, the following warning will be displayed when the **Actuals** Tab is selected:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2023/2024 Summer Term - 3 & 4 Year Olds 3 [CHANGE](#)

 In grace period


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

- A warning triangle will also be displayed next to the Child's name



- Double click on the child's name and the Summary page will show the details of the code:

Summary Child Details Parent / Carer Details Funding Details Documents Notes

 Child is in grace period

<b>Term Start Date</b>	08-Apr-2024
<b>Term End Date</b>	19-Jul-2024
<b>No of weeks attended</b>	13.00
<b>Nominated for DAF</b>	No
<b>Eligibility Start Date</b>	15-Apr-2023
<b>Eligibility End Date</b>	12-Feb-2024
<b>Grace Period End Date</b>	31-Aug-2024
<b>Eligibility last checked</b>	02-Nov-2023 15:15:07
<b>► Provider Total Rate</b>	£5.25

- The warning triangle is to alert the setting to codes with expired validity end dates and show when the grace period is due to end.
- This should be used as a prompt to remind the parent to re-confirm their Eligibility code to ensure that it remains valid and will be eligible for funding at the start of the following term.

**Note:**The funding office audit Eligibility hour codes 3 times each term, in the first week, around half term and towards the end. The codes that have been re-confirmed will update in your records if the Provider Portal is open i.e during the Headcount and Adjustment periods. At other times the information is 'frozen' and checks will need to be made on the Eligibility Checker tab.

#### 4. 2 YEAR FUNDING CLAIMS:

- Following the changes in the 2 year old entitlements from April 2024 there are now 2 funding entitlement types for 2 year Olds in the Access Synergy FIS Provider Portal, **Disadvantaged Funding** and **Working Parent Funding**:

##### 2 year old Disadvantaged Funding entitlement, 2Help:

Families who are on certain benefits and credits as detailed in page 2 of the website: [www.warwickshire.gov.uk/childcarecosts](http://www.warwickshire.gov.uk/childcarecosts). This website is where parents need to apply for 2Help funding via the Parent Portal.

If the application is successful, the parent/carer will be sent (usually by email) a Confirmation of Eligibility letter to confirm that their child is eligible for 2Help funding.

The setting **must** see a copy of this letter before offering a place, the letter has details of the **EY Voucher code** and the date that funding can start from.

The parent must complete the **2Help entitlement** boxes in section 2 of the Parental Declaration Form before a funding claim is made see below:

Part 2 – Accessing the Entitlements – please tick the relevant box		
<input type="checkbox"/> <b>2Help entitlement</b>		
For parents who meet the criteria for the 2Help entitlement funding who have confirmed eligibility via the Warwickshire County Council website and provided a funding confirmation letter with the <b>EY Voucher Code</b> issued. If you do not have evidence that your child is eligible, you will be liable to pay for any additional hours accessed where the provider is unable to claim funding for your child. <b>Please complete the information below:</b>		
*EY Voucher Code:	*Start Date:	*For provider Copy of confirmation letter/email taken
		Yes <input type="checkbox"/> No <input type="checkbox"/>

If the confirmation letter/email is from a Local Authority outside of Warwickshire, the setting will need to follow the process for **Out of County Children** in Section 4.2 on page 53. As the code from their local authority will not be compatible in our system.

### Working Parent Funding - 2 year old Entitlement for Working Parents:

A family will need to meet certain eligibility criteria as detailed in page 3 of the website: [www.warwickshire.gov.uk/childcarecosts](http://www.warwickshire.gov.uk/childcarecosts) and have been issued an 11 digit Eligibility code starting with 50, or 11 for temporary codes, by HMRC.

**Follow section 3.1 from page 11 for the process on how to check the Eligibility code.**

The code must be checked to confirm that it is eligible for funding for the term, from the information provided in the Termly Information Letter, before a place is offered and the parent must complete the **Working Parent Expanded 15 hours entitlement for 2 year olds** in section in part 2 of the Parental Declaration Form see below:

<input type="checkbox"/> <b>Working Parent Expanded 15 hours entitlement for 2 year olds*</b>		
<input type="checkbox"/> Universal 15 hours entitlement for 3 & 4 year olds		
<input type="checkbox"/> Working Parent Extended 15 hours entitlement for 3 & 4 year olds*		
*For the <b>Working Parent entitlements</b> from the term following the child's 2nd birthday, with a valid <b>eligibility code issued by HMRC</b> , the <u>term before</u> they are due to access a funded place. The eligibility code is to be reconfirmed every 3 months. If you do not have a valid code for the term, you will be liable to pay for any additional hours accessed where the provider is unable to claim funding using the eligibility code. <b>Please complete the information below:</b>		
*Parent / Carer Forename and Surname:	*Parent / Carer National Insurance Number:	*Eligibility Code (11 digit number starting with 50)

- Claims for both of these entitlements are made using the **2 Year olds Funding Type** and by selecting the correct entitlement in the child's **Funding Detail tab** as detailed in sections 4.1 and 4.3 below.

### 4.1 How to Enter a 2Help Funding Claim

- As for the 3 & 4 year process, select Funding>Select the correct Year, Term and funding type:

- Select the Actuals tab, the following page will appear:

There are 2 options - **Add Child** OR **Enter EY Voucher** – **DO NOT ADD A CLAIM TO BOTH.**

- If you are claiming **2 Help** funding for a child with confirmation from Warwickshire, select the **EY Voucher** box enter the **EY Voucher code** shown on the letter or added to the 'EY Voucher Code' box in part 2 of the Parental Declaration Form (PDF) see below.

**NOTE:** If the confirmation is from another local authority, you will not be able to enter a EY Voucher code. Select **Add Child**, you will then need to follow the process for adding an out of county child, refer to **Section 4.2 page 53**.

- Complete all the mandatory fields marked with \* and **Submit**.

- If the details match with our records, the child's record will automatically open at the summary tab:

**Name: James Beach DOB: 21-Apr-2021**

Summary Child Details Parent / Carer Details Funding Details Documents Notes

<b>Term Start Date</b>	04-Sep-2023	<b>Universal Funding</b>	
<b>Term End Date</b>	22-Dec-2023	Funded Hours Per Week	0.00
<b>No of weeks attended</b>	0.00	Funded Hours for Term	0.00
<b>Provider Total Rate</b>	£7.81		
		<b>Funding Amount @ Provider Rate</b>	<b>£0.00</b>
		<b>Child Weightings</b>	<b>£0.00</b>
		<b>Universal Funding Amount</b>	<b>£0.00</b>
		<b>Totals</b>	
		Funded Hours Per Week	0.00
		Funded Hours for Term	0.00
		<b>Total Funding (excl. Adj)</b>	<b>£0.00</b>
		Total amount from Adjustments	£0.00
		Total amount from Pending Adjustments	£0.00
		<b>Total Funding For Term (inc Adj)</b>	<b>£0.00</b>

Save Cancel \*denotes mandatory fields

- Select the Child Details Tab – the child’s details will already be pre-populated:

Summary Child Details Parent / Carer Details Funding Details Documents Notes

**Child Details**

Forename\* James  
 Middle Name  
 Surname\* Beach  
 DOB\* 21-Apr-2021  
 Proof of DOB   
 Gender\*  Male  Female  
 Preferred Surname  
 Ethnicity\* Information Not Yet Obtained  
 SEN COP Stage <Unknown>

Update Address

**Address**

Address Line 1\* Unit 1  
 Address Line 2 Saltisford Office Park  
 Address Line 3 Ansell Way  
 Locality  
 Town  
 County  
 Postcode\* CV34 4UL

Save Cancel \*denotes mandatory fields

- Check that the details are correct and match with the details completed on the Parental Declaration Form
- Update the Ethnicity and SEN COP Stage boxes to show the correct information:

Summary Child Details Parent / Carer Details Funding Details Documents Notes

**Child Details**

Forename\* James  
 Middle Name  
 Surname\* Beach  
 DOB\* 21-Apr-2021  
 Proof of DOB   
 Gender\*  Male  Female  
 Preferred Surname  
 Ethnicity\* White - British  
 SEN COP Stage No Special Educational need

Update Address

**Address**

Address Line 1\* Unit 1  
 Address Line 2 Saltisford Office Park  
 Address Line 3 Ansell Way  
 Locality  
 Town  
 County  
 Postcode\* CV34 4UL

Save Cancel \*denotes mandatory fields



- The Parent Carer tab will need completing if the parent has added their details for EYPP on the Parental Declaration Form:

**Early Years Pupil Premium (EYPP)**

The Early Years Pupil Premium (EYPP) gives providers additional funding to support some pupils. Children with EYPP will have a higher priority when applying for a school place where a school is oversubscribed.  
 For more details visit: [www.warwickshire.gov.uk/childcarecosts](http://www.warwickshire.gov.uk/childcarecosts)

**Q1: Family Income and Benefits**  
 Is your gross household income below £16,190 and you are in receipt of benefits (not Working Tax credit) or Is your Net income below £7,400 and you receive Universal Credits?  
 YES  NO

A claim for EYPP will not affect your claim for benefit or credits  
**If you have ticked YES, please complete the following section:**

*Parent / Carer Surname:	*Parent / Carer Forename:	*Parent / Carer Date of Birth:	*Parent / Carer National Insurance No or NASS Reg No:

- Complete the Parent/Carer Details and tick the EYPP box:

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

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for expanded hours.  
 Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.

Parent / Carer Details	Partner Details
Forename <input type="text"/>	Forename <input type="text"/>
Surname <input type="text"/>	Surname <input type="text"/>
DOB <input type="text"/>	DOB <input type="text"/>
Email <input type="text"/>	Email <input type="text"/>
Contact Number <input type="text"/>	Contact Number <input type="text"/>
<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number
Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility	Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input type="checkbox"/> Working Family Eligibility

**Save** **Cancel** \*denotes mandatory fields

- Select the Funding Details Tab:

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

Funding Details	Attendance Days
Start Date* <input type="text"/>	Attends Monday <input type="radio"/> Yes <input type="radio"/> No
End Date* <input type="text"/>	Attends Tuesday <input type="radio"/> Yes <input type="radio"/> No
<b>Default Term Dates</b>	Attends Wednesday <input type="radio"/> Yes <input type="radio"/> No
Weeks Attended in Term* <input type="text"/>	Attends Thursday <input type="radio"/> Yes <input type="radio"/> No
Present during Census <input checked="" type="checkbox"/>	Attends Friday <input type="radio"/> Yes <input type="radio"/> No
Attends Two Days or More <input type="checkbox"/>	Attends Saturday <input type="radio"/> Yes <input type="radio"/> No
Nominated for DAF* <input type="radio"/> Yes <input type="radio"/> No	Attends Sunday <input type="radio"/> Yes <input type="radio"/> No
Funding Type* <input type="radio"/> Disadvantaged Funding <input type="radio"/> Working Family Funding	Non-Funded Hours per Week Non-Funded Hours* <input type="text"/>

**Save** **Cancel** \*denotes mandatory fields

Children can only be funded for one funding type, please select which funding type you wish to enter before proceeding.

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: 13.00

- Select 'Default Term Dates', this will pre-populate the term dates.

- Enter the number of weeks for the term in 'Weeks Attended in Term' this is found in the Termly Information Letter, the red box in the bottom right hand corner will show the standard number of weeks in the term

**Maximum Values Allowed:**

Number of Weeks: **13.00**

Funded Weekly Hours: **15.00**

Funded Termly Hours: **195.00**

Funded Yearly Hours: **570.00**

- Tick the 'Present during Census' box.
- If the parent has completed the **DAF section** on the Parental Declaration Form and provided a copy of the DLA award letter, select the 'Yes' button.

**Additional Entitlements:**

**Disability Access Fund (DAF)**

For children in receipt of child Disability Living Allowance (DLA) and receiving the funded Early Education entitlement. DAF is paid to the child's nursery as a fixed annual rate, as notified by the Local Authority, each calendar year.

Please tick if your child is receiving DLA    YES     NO

**If you have ticked Yes, you must provide a copy of the DLA Award letter to your early years provider.**

If your child is splitting their funded Early Education entitlement across two or more providers, please nominate the setting where the local authority should pay DAF

\*Name of Provider

- Refer to pages 26/27 for further details of entering a claim for DAF.

- Select the Disadvantaged Funding button

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

**Funding Details**

Start Date\* 08-Apr-2024  
End Date\* 19-Jul-2024  
Default Term Dates

Weeks Attended in Term\* 13

Present during Census   
Attends Two Days or More

Nominated for DAF\*  Yes  No

Funding Type\*  Disadvantaged Funding  Working Family Funding

- Enter the hours to be claimed under **Funded Hours per Week**, as completed in the Parental Declaration Form:

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

**Funding Details**

Start Date\* 08-Apr-2024  
End Date\* 19-Jul-2024  
Default Term Dates

Weeks Attended in Term\* 13

Present during Census   
Attends Two Days or More

Nominated for DAF\*  Yes  No

Funding Type\*  Disadvantaged Funding  Working Family Funding

**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

**Funded Hours per Week**  
Hours\* 15

**Non-Funded Hours per Week**  
Non-Funded Hours\* 0

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/carers

**Maximum Values Allowed:**  
Number of Weeks: 13.00  
Funded Weekly Hours: 15.00  
Funded Termly Hours: 195.00  
Funded Yearly Hours: 570.00

Save Cancel \*denotes mandatory fields

- If you have selected the 'Yes' for DAF button, select the **Documents Tab** and add a copy of the DLA Award letter, see details of how to do this in Section 3.4.5 page 30

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

**Supporting Documents**  
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.  
Allowed file types are: All file types permitted  
Files may not be larger than 999 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel \*denotes mandatory fields

- Save

- The child will appear on the list of funded children as **'Unsubmitted Claim'**:

The screenshot shows the 'Funding' page with a navigation bar at the top containing 'Home' and 'Funding'. Below the navigation bar are tabs for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A main heading reads 'Submit Actual: 2023/2024 Autumn Term - 2 Year Olds' with a 'CHANGE' link. Below this are three buttons: 'Add Child', 'Enter EY Voucher', and 'Send Claim'. A table displays the following data:

	Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
	Unsubmitted Claim	Beach, James (21-Apr-2021)	210.00	£1640.10	

Below the table are three buttons: 'Add Child', 'Enter EY Voucher', and 'Send Claim'. Red circles highlight the 'Unsubmitted Claim' status in the table and the 'Send Claim' button below it.

- When all children have been entered click on **Send Claim**.
- Confirmation of the submission will appear in the green tick box, children will show as **'New, Awaiting LA Download'**:

The screenshot shows the 'Funding' page with a green banner at the top that says 'Submission Successful' with a green checkmark icon. Below the banner are the same navigation tabs and heading as in the previous screenshot. The table now shows:

	Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
	Awaiting LA Download	Beach, James (21-Apr-2021)	210.00	£1640.10	

Below the table are three buttons: 'Add Child', 'Enter EY Voucher', and 'Send Claim'. A red circle highlights the 'Awaiting LA Download' status in the table.

- When the claim has been checked and accepted by the LA, a **cross** will show :

The screenshot shows the 'Funding' page with a table displaying the following data:

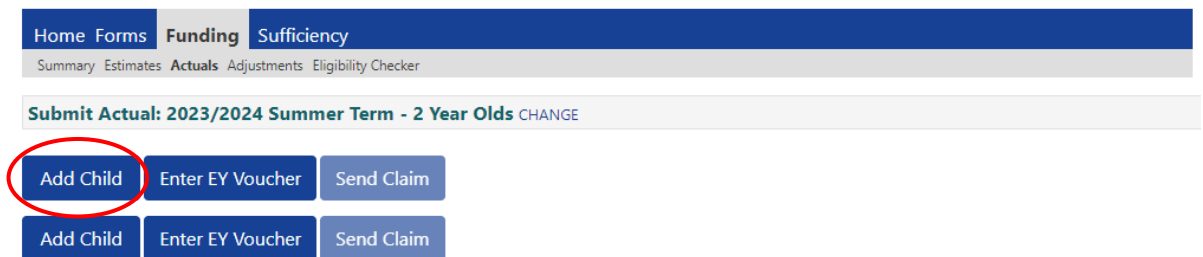
	Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Beach, James (21-Apr-2021)	210.00	£1640.10	

Below the table are three buttons: 'Add Child', 'Enter EY Voucher', and 'Send Claim'. A red circle highlights a cross icon in the first column of the table row.

## 4.2 How to enter a claim for an Out of County Child for 2 Year Funding for the Disadvantaged Entitlement ( 2Help):

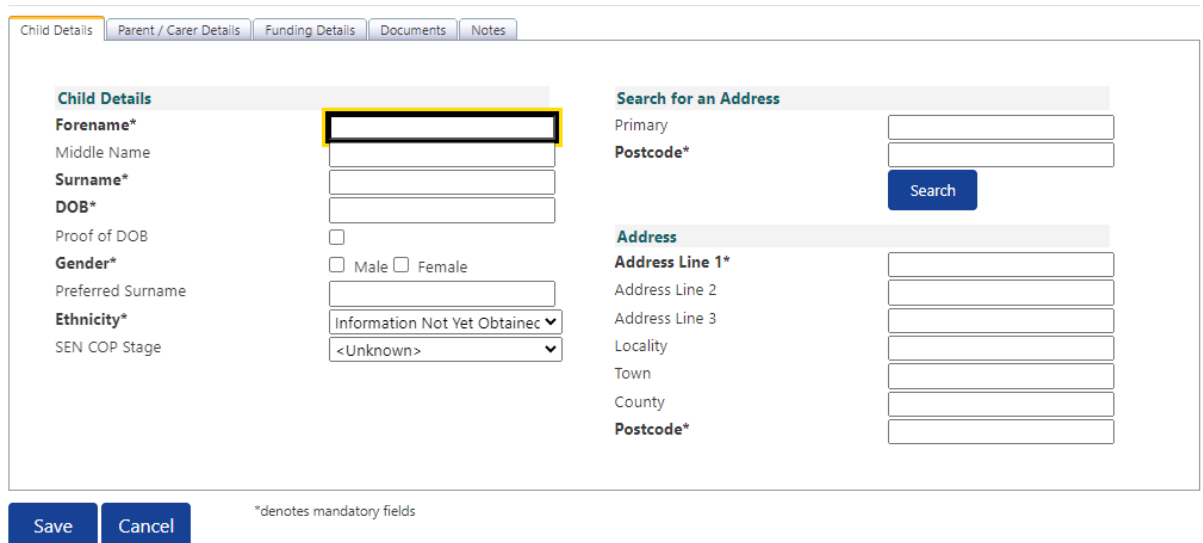
If a child has applied for 2 year funding from a local authority outside of Warwickshire; because they live out of county or they have just moved house, the confirmation of proof of eligibility issued by their own or previous local authority can be accepted, however, **you will not be able to add a EY voucher code issued by another local authority.**

- Select the **Add Child** box.



The screenshot shows a navigation bar with tabs for 'Home', 'Forms', 'Funding', and 'Sufficiency'. Below the tabs are links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. A sub-header reads 'Submit Actual: 2023/2024 Summer Term - 2 Year Olds' with a 'CHANGE' link. Below this, there are two rows of buttons: 'Add Child', 'Enter EY Voucher', and 'Send Claim'. The 'Add Child' button in the top row is circled in red.

- The child's details will not be pre-populated, the details are will need to be entered manually in the Child Details tab:



The screenshot shows the 'Child Details' form with several tabs: 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Documents', and 'Notes'. The 'Child Details' tab is active. The form contains the following fields:

- Child Details**
  - Forename\* (highlighted with a yellow box)
  - Middle Name
  - Surname\*
  - DOB\*
  - Proof of DOB
  - Gender\*  Male  Female
  - Preferred Surname
  - Ethnicity\* (Information Not Yet Obtainec)
  - SEN COP Stage (<Unknown>)
- Search for an Address**
  - Primary
  - Postcode\* (with a Search button)
- Address**
  - Address Line 1\*
  - Address Line 2
  - Address Line 3
  - Locality
  - Town
  - County
  - Postcode\*

At the bottom, there are 'Save' and 'Cancel' buttons, and a note: '\*denotes mandatory fields'.

- The process will then continue in the same way for a child with an EY Voucher code above
- A copy of the confirmation letter from the originating authority **MUST** also be sent to the Early Years Funding Team using the **Documents** tab:
- Select **Documents** tab – attach the eligibility confirmation letter from the issuing local authority, **see page 30** on how to upload a file to the Documents tab.

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

**Supporting Documents**

Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.  
 Allowed file types are: All file types permitted  
 Files may not be larger than 999 MB.

Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel \*denotes mandatory fields

### 4.3 How to enter a claim for 2 Year Funding for the Working Parent Entitlement

- 2 year olds eligible for the working parent entitlement will have been issued with an Eligibility code by HMRC.
- The parents will need to add the code details in Part 2 of the Parental Declaration Form:
- The Eligibility code must be checked using the Eligibility Checker to check that the dates are eligible for funding for the term.
- Follow the process in section 3.1 from page 10.
- Enter the child on your Headcount by selecting the correct term and funding type

Home Forms | **Funding** | Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

**Actuals Head Count Records for 2023/2024 - Summer Term**

2023/2024	Funding Type	Office use only	
Summer Term		Ready To Process	Processed
Submission Period: 20-Feb-2024 to 24-May-2024	2 Year Olds		
	3 & 4 Year Olds 3		

- Select the Add Child option:

Home Forms | **Funding** | Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

**Submit Actual: 2023/2024 Summer Term - 2 Year Olds** CHANGE

Add Child Enter EY Voucher Send Claim

Add Child Enter EY Voucher Send Claim

- Complete the Child details tab in the same way as for 3 & 4 year funding
- Select Parent/ Carer Details tab
- Complete the parent carer details from the Parental Declaration Form
- Tick the Working Family Eligibility box
- Tick the EYPP box if the parent has completed the EYPP section of the Parental Declaration Form

Entering Parent/Carer details enables us to check whether the child is eligible for Early Years Pupil Premium (EYPP) funding, and whether the child is eligible for expanded hours.

Please ensure you input details for all records that have given their permission to do so, as this ensures you receive the additional funding. Please also ensure that the correct consent boxes are selected as per the usage of the details.

**Parent / Carer Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

**Partner Details**

Forename

Surname

DOB

Email

Contact Number

NI or  NASS Number

Tick to give consent to Eligibility Checking for  EYPP  Working Family Eligibility

Save Cancel \*denotes mandatory fields

- Select the Funding Details tab.
- Select the Default term dates to prepopulate the funding term dates.
- Add the correct number of weeks for the term.
- Select the correct **Nominated for DAF** option.
- If Yes follow the process from page 26/27.
- Click on the Working Family Funding button

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Documents Notes

**Funding Details**

Start Date\* 08-Apr-2024

End Date\* 19-Jul-2024

Default Term Dates

Weeks Attended in Term\* 13

Present during Census

Attends Two Days or More

Nominated for DAF\*  Yes  No

Funding Type\*  Disadvantaged Funding  Working Family Funding

Expanded Funded Hours per Week

Expanded Hours\*

Eligibility Code

Check Eligibility Code

Eligible for Expanded 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: 13.00

Expanded Weekly Hours: 15.00

Expanded Termly Hours: 195.00

Expanded Yearly Hours: 570.00

Save Cancel \*denotes mandatory fields

- Enter the funded hours in the **Expanded Hours** box under the **Expanded Funded Hours per Week** section and complete the **Non Funded Hours** box (0 hours must be entered) if required.
- Add the Eligibility Code in the **Eligibility Code** box and click the **Check Eligibility Code** blue box:

Home Forms Funding Sufficiency

Summary Estimates Actuals Adjustments Eligibility Checker

The Eligibility Code has been found and eligibility for working family hours has been obtained.

Child Details Parent / Carer Details Funding Details Documents Notes

**Funding Details**

Start Date\* 08-Apr-2024

End Date\* 19-Jul-2024

Default Term Dates

Weeks Attended in Term\* 13

Present during Census

Attends Two Days or More

Nominated for DAF\*  Yes  No

Funding Type\*  Disadvantaged Funding  Working Family Funding

Expanded Funded Hours per Week

Expanded Hours\* 15

Eligibility Code 50104395168

Check Eligibility Code

Eligible for Expanded 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\* 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: 13.00

Expanded Weekly Hours: 15.00

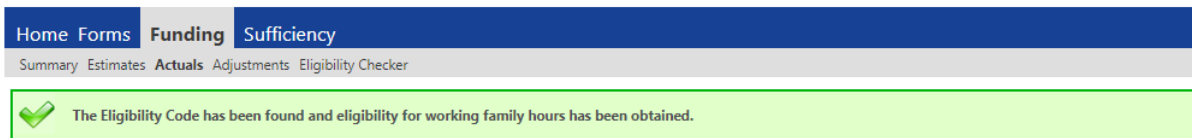
Expanded Termly Hours: 195.00

Expanded Yearly Hours: 570.00

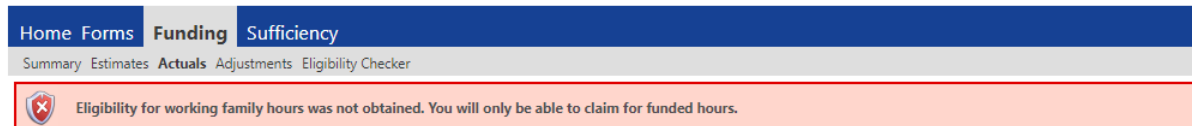
Save Cancel \*denotes mandatory fields



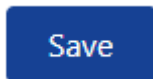
- If the code is eligible for funding for the term the green bar will be displayed:



- If the details have been added incorrectly or the code is not eligible for the term, the red bar will be displayed with a reason why the code has not been found:



- When all tabs have been completed, click **Save**



#### 4.4 Edit and Deleting

Follow the same process for 3 & 4 year funding section 3.3.2 and 3.3.3

### 5. SUMMARY TAB:

The Summary tab shows the Provider's financial information about the funding they have received for the early year's entitlements split into Estimate and Actuals.

#### Indicative Funding Information

The previous year's funding taken from the Summary tab for each term should be used as the setting's **Indicative Funding Information** for the forthcoming year. It is therefore important that the setting is aware of these figures to help forecast their funding.

**Make a diary note to view the Summary tab on a termly basis ( preferably 2 weeks after the Headcount deadline date) to check the funding due to be paid to the setting and how it is broken down.**

To view the **SUMMARY**:

- Login to the Provider Portal
- Select **Funding** Tab
- Select the required term
- Select the correct funding type

- The Summary Information will automatically be displayed:

Home Funding	
Summary Estimates Actuals Adjustments Eligibility Checker	
Summary: 2023/2024 Autumn Term - 3 & 4 Year Olds 3 CHANGE	
Rate x Hours may not equal Totals as rounding is applied per child. The totals shown are the sum of the funding amounts per child.	
Estimates	Actuals
Term Length (Weeks) 14.00	Term Length (Weeks) Term Time 14.00
Provider Rate applied £5.01	Provider Rate applied to child funding £5.01
Estimate Funding	Universal Funding
Hours Per Week 292.00	Funded Hours for Term 4375.00
Term Funding Amount £20480.88	Funding Amount @ Provider Rate £21918.75
Interim % 70.00%	Child Weightings Total £1322.38
Interim Amount Payable £14336.62	Universal Funding Amount £23241.05
Total Interim Amount Paid to Date (before Adj) £14336.62	Extended Funding
Interim Amount Payable Balance £0.00	Funded Hours for Term 840.00
	Funding Amount @ Provider Rate £4208.40
	Child Weightings Total £130.20
	Extended Funding Amount £4338.60
	Totals
	Funded Hours for Term 5215.00
	Funding Amount @ Provider Rate £26127.15
	Child Weightings £1452.50
Processed Yes	Term Funding Amount £27579.65
Processed Date 15-Aug-2023	Interim Amount Paid (before Adj) £14336.62
	Term Funding Amount Balance £13243.03
	Adjustments Paid with Final Payment £0.00
	Actual Amount Paid (Inc. Adj) £13243.03

The **Summary tab** shows:

- Estimates - the breakdown of how the Estimate payment was made, based on 70% of the funding value for the hours submitted to us at the start of the term.
- Actuals - the breakdown of the hours claimed at the Headcount split into Universal Hours and Extended Hours and their funding value.
- Weightings paid.
- Adjustments paid.

## 6. ADJUSTMENTS TAB:

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, of the Requirements of Early Education Funding 2024 for details of the adjustment criteria available on the website:

<https://schools.warwickshire.gov.uk/early-years-childcare-providers>

### 6.1 Online Adjustments tab details:

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 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 open 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 Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021	Actuals (Office use only)			
	Funding Type	Ready To Process	Processed	Editable
	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 in the **Ready to Process** column, 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 Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021 2020/2021 2019/2020 2018/2019 2017/2018	<table border="1"> <thead> <tr> <th>Funding Type</th> <th>Ready To Process</th> <th>Processed</th> <th>Editable</th> </tr> </thead> <tbody> <tr> <td># 2 Year Olds</td> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> </tr> <tr> <td>3 &amp; 4 Year Olds 3</td> <td><input checked="" type="checkbox"/></td> <td></td> <td></td> </tr> </tbody> </table>	Funding Type	Ready To Process	Processed	Editable	# 2 Year Olds	<input checked="" type="checkbox"/>			3 & 4 Year Olds 3	<input checked="" type="checkbox"/>		
Funding Type	Ready To Process	Processed	Editable										
# 2 Year Olds	<input checked="" type="checkbox"/>												
3 & 4 Year Olds 3	<input checked="" type="checkbox"/>												

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

Home Funding	
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. 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.</p>	
View Adjustments: 2023/2024 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 Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021	<table border="1"> <thead> <tr> <th>Funding Type</th> <th>Ready To Process</th> <th>Processed</th> <th>Editable</th> </tr> </thead> <tbody> <tr> <td>pen 2 Year Olds</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>3 &amp; 4 Year Olds 3</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> </tbody> </table>	Funding Type	Ready To Process	Processed	Editable	pen 2 Year Olds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		3 & 4 Year Olds 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Funding Type	Ready To Process	Processed	Editable										
pen 2 Year Olds	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>											
3 & 4 Year Olds 3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>											

**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.

## 6.2 How to add 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  
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	✓	✓	

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-2010)	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

### Adding a NEW child to Adjustments:

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, but 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 a new child in Actuals
- 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

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FIS Provider Portal - Part of the Sunerov FIS Suite

## Funding Details tab:

As the Headcount submission date has passed not all boxes will be available, some boxes will be 'greyed out' 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

**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

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/carers

**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**

\*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	<input type="button" value="Upload a file"/>
No Documents Uploaded		

\*denotes mandatory fields



## Pending Adjustment tab:

Following the instructions in the Blue box:

- 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:

## 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)

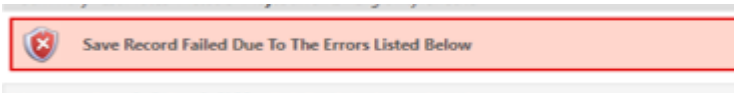
Maximum Values Allowed:  
Universal Termly Hours: 210.00  
Universal Yearly Hours: 570.00

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 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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## 6.3 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-Mar-2016)						
<b>Wicks, Joe</b> (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':

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:   
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**

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)

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: £1747.95

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



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
	<a href="#">George, Michael</a> (25-Dec-2017)	0.00	0.00	105.00	0.00	£435.75	
	<a href="#">Hope, Holly</a> (02-Feb-2018)	0.00	0.00	168.00	0.00	£1312.20	
	<a href="#">Star, Sally</a> (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	<a href="#">Swift, Taylor</a> (05-Aug-2018)	0.00	0.00	210.00	0.00	£871.50	
ⓘ ⌛ Awaiting LA Download	<a href="#">Wicks, Joe</a> (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
	<a href="#">George, Michael</a> (25-Dec-2017)	0.00	0.00	105.00	0.00	£435.75	
	<a href="#">Hope, Holly</a> (02-Feb-2018)	0.00	0.00	168.00	0.00	£1312.20	
	<a href="#">Star, Sally</a> (03-Mar-2018)	0.00	0.00	210.00	42.00	£1045.80	
	<a href="#">Swift, Taylor</a> (05-Aug-2018)	0.00	0.00	210.00	0.00	£871.50	
	<a href="#">Wicks, Joe</a> (05-Nov-2017)	0.00	0.00	189.00	0.00	£784.35	

Add Child Send Claim

## 6.4 Rejected Claims

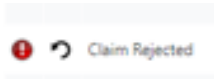
If an adjustment claim cannot be accepted by the funding office because:

- 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

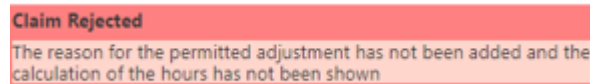
The adjustment claim will be **rejected**.

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

The screenshot shows a web form with several tabs: Summary, Child Details, Parent / Carer Details, Funding Details, Documents, Pending Adjustment (selected), and Notes. A light blue instruction box at the top reads: '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'. Below this are two columns: 'Universal Pending Adjustment' and 'Extended Pending Adjustment'. Each column has a 'Number of Hours' field with a dropdown menu (set to 'More Hours') and a text input field (containing '10.00'). Below each is a 'Reason (500 characters)' text area. At the bottom of each column is a red-bordered box with 'Maximum Values Allowed:' and 'Universal/Extended Termly Hours: 165.00' and 'Universal/Extended Yearly Hours: 570.00'. At the bottom left are 'Save' and 'Cancel' buttons. A note '\*denotes mandatory fields' is at the bottom center.

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
	<a href="#">Bank, Mark</a> (22-Mar-2018)	0.00	0.00	165.00	0.00	£1387.20	
Claim Rejected	<a href="#">John, Smythe</a> (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

<b>Term Start Date</b>	04-Jan-2022	<b>Universal Funding</b>
<b>Term End Date</b>	08-Apr-2022	Funded Hours Per Week
<b>No of weeks attended</b>	11.00	Funded Hours for Term
<b>Nominated for DAF</b>	No	
<b>Provider Total Rate</b>	£4.15	<b>Funding Amount @ Provider Rate</b>
		<b>Child Weightings</b>
		<b>Universal Funding Amount</b>
		<b>Totals</b>
		Funded Hours Per Week
		Funded Hours for Term
		<b>Total Funding (excl. Adj)</b>
		Total amount from Adjustments
		Total amount from Pending Adjustments
		<b>Total Funding For Term (inc Adj)</b>

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

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

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
<b>!</b>	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**:

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

Examples:

▼ Paid as Adjustments - Total: £1747.05, 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

## 6.5 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**

**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  
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: 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

**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
<input type="text" value="DLA Award letter"/>	DAF.docx	<input type="button" value="Delete"/>

\*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 **Notes** Pending Adjustment

**Add a new note**

**Notes History**

No Historical Notes

\*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	
		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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## 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		Partner Details	
Forename	<input type="text" value="Martha"/>	Forename	<input type="text"/>
Surname	<input type="text" value="Ball"/>	Surname	<input type="text"/>
DOB	<input type="text" value="14-Dec-2001"/>	DOB	<input type="text"/>
<input checked="" type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text" value="AB123456C"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	<input type="text"/>
Tick to give consent to Eligibility Checking for	<input checked="" type="checkbox"/> EYPP <input type="checkbox"/> 30H	Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP <input type="checkbox"/> 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:

The screenshot shows a web interface with a navigation bar at the top containing 'Home', 'Forms', 'Funding', and 'Sufficiency'. Below this is a sub-navigation bar with 'Summary', 'Estimates', 'Actuals', 'Adjustments', and 'Eligibility Checker'. The main content area is titled 'Name: Holly Hope DOB: 02-Feb-2018' and has tabs for 'Summary', 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Documents', 'Pending Adjustment', and 'Notes'. The 'Summary' tab is selected, showing a table of funding information. At the bottom of the page are 'Save' and 'Cancel' buttons, and a note that an asterisk denotes mandatory fields.

Term Start Date	02-Sep-2021	<b>Universal Funding</b>	
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	<b>Funding Amount @ Provider Rate</b>	<b>£871.50</b>
		<b>Child Weightings</b>	<b>£0.00</b>
		<b>Universal Funding Amount</b>	<b>£871.50</b>
		<b>Totals</b>	
		Funded Hours Per Week	15.00
		Funded Hours for Term	210.00
		<b>Total Funding (excl. Adj)</b>	<b>£871.50</b>
		Total amount from Adjustments	£615.00
		Total amount from Pending Adjustments	£0.00
		<b>Total Funding For Term (inc Adj)</b>	<b>£1486.50</b>

## 6.5 2 Year Funding Adjustments

### To enter an Adjustment for 2 year funding:

- Follow the basic process as for 2 year funding in section 4.1 and 4.3
- 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		Actuals (Office use only)		
Autumn Term Submission Period: 01-Nov-2021 to 03-Dec-2021	Funding Type	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				
<input type="button" value="Add Child"/> <input type="button" value="Enter EY Voucher"/> <input type="button" value="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
<input type="button" value="Add Child"/> <input type="button" value="Enter EY Voucher"/> <input type="button" value="Send Claim"/>				

### 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

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\***

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\***

\*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\*

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

- 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		

**Save** **Cancel** \*denotes mandatory fields

- 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**:

**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 ▾

	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

### 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**

\*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 ↕

		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

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

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 - 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

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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 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

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## 6.6 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
---	------------------------	----------------------------------	--------	------	--------	------	---------

- The **Confirm Delete** box will appear and select **Yes**

**Confirm Delete**

Are you sure you want to delete child: Morris, William from this headcount record?

## 7. FORMS TAB:

The Forms tab is used to complete the Early Years Census Form for Childminders, PVI Providers, SFGR settings for children not included in the School Census in the Spring term.

It is also used to complete the FIS forms PVI and M Provider Update Form and the Childminder Update Form.

### 7.1 How to enter the Early Years CENSUS using the Forms tab


The **Early Years Census** is completed on an annual basis in the **Spring term**. The relevant Early Years Census form will be available on the **Forms** tab from the beginning of January.

The Census is a statutory requirement for the Local Authority and it must be returned to the DfE by the deadline they set. Refer to the **Guidance and Requirements of Funding 2022 updated July 2023** on page 2 of the website: <https://schools.warwickshire.gov.uk/early-years-childcare-providers>

It is a requirement for funding for early years providers to complete the Census Form by the deadline as advised to them in the Spring term Termly Information Letter. **If providers do not return a Census Form when requested, they will not receive future funding payments.**

To access the **Early Years Census form**:

- Log in as previously instructed.
- Select **Forms**
- A list of forms available will be shown:



The screenshot shows a navigation bar with 'Home', 'Forms', and 'Funding Sufficiency'. The 'Forms' tab is highlighted and circled in red. Below the navigation bar, there are links for 'Fill In Forms' and 'View Forms'. A section titled 'Fill In Forms' contains the instruction 'Please select a form below to update your details:'. Below this instruction, there is a list of forms: 'Early Years Census Form 2023' (circled in red) and 'PVI & M Provider Update Form'.

- Select the **Early Years Census Form** for the current year.

**Please note:** The form shown below is an example and may be different from the actual form shown on the portal in the Spring term 2024.

### Section 1 – Provider Details

The Provider Details page is mainly pre-populated with the details held for the setting by Ofsted. If any of these details are incorrect or out of date, the setting must contact Ofsted directly as the local authority is unable to change them.

- Complete the 'blank' boxes where applicable.

2, 3 & 4 Year Olds Early Years Census 2023	
<p>Next Page Select Page: <input type="text"/> &gt;&gt;</p>	
<p><b>Contacts to use to support the completion of this form:</b>            Please read the Guide on Page 3 before completing this form.            The 2, 3 &amp; 4 year Nursery Funding Officers can be contacted on: 01926 742238            and for Childminders on: 01926 742218</p>	
<p>Contact email addresses: <a href="mailto:eyfunding@warwickshire.gov.uk">eyfunding@warwickshire.gov.uk</a>,  <a href="mailto:childminderfunding@warwickshire.gov.uk">childminderfunding@warwickshire.gov.uk</a>            To contact the Ofsted Help team, tel: 0300 123 1231 or email:  <a href="mailto:enquiries@Ofsted.gov.uk">enquiries@Ofsted.gov.uk</a>            For Family Information Service (FIS) tel:01926 742274 or            email: <a href="mailto:FIS@warwickshire.gov.uk">FIS@warwickshire.gov.uk</a></p>	
<p>Local Authority Name : Warwickshire            Local Authority Number: 937</p>	
<p><b>Census collection date: 19/01/2023</b>  <b>Complete and submit by 27/01/2023</b></p>	
<p><b>Section 1 - Provider Details</b></p>	
LA Establishment URN: (issued to Provider)	DCSF URN <input type="text"/>
OFSTED URN (if applicable):	OFSTED Reference <input type="text"/>
Provider Name:	Provider Name <input type="text"/>
Postcode:	Postal Code <input type="text"/>
Contact numbers provided by Ofsted:	Mobile <input type="text"/>
	Telephone <input type="text"/>
Email addresses provided by Ofsted:	Email <input type="text"/>
	E-Mail <input type="text"/>
<p>If the above details are incorrect we advise you to contact the Ofsted Extranet team (see contacts above) to update these details.</p>	
Main Contact Number(if different from above):	<input type="text"/>
Main Contact Name:	<input type="text"/>
<p>Next Page Select Page: <input type="text"/> &gt;&gt;</p>	

## Section 2 – About the Provision

- Complete the details as requested using options from the drop down boxes. Refer to the **Guide for data collection** on page 3 before starting to enter the details.

**Early Years Census 2023 continued...**

Previous Page   Next Page   Select Page:

---

**Section 2 - General details of provision**  
 Note: This relates to ALL children in your care

**Section 2A: Category of Provider**  
 Select an option from the drop down box to be updated by the DfE:  
 (please do not select the invalid 22r options)

Sector

**Section 2B: Type of Care**  
 To be completed by private or voluntary providers only. Type of care (as specified in your Ofsted registration document)

Select from the drop down box your MAGN provision to be updated by DfE e.g. Day Nursery  
 (please do not select the invalid 22r options)

Provider Type

Please select the care type e.g. Full Day Care  
 (please do not select the invalid 22r options)

Day Care Type

**Section 2C: premises and opening times (all providers)**  
 If you are not open on the census date please record your hours during a normal week.

Open 24/7 Indicator  
 (Are you open 24 hours a day and 7 days a week?)  Yes  No

**Opening and closing times:**

Daily Opening Times

Day	Start Time	End Time	Funded Places
			<input type="checkbox"/>

Do you operate on the premises of a maintained school or have a contract or partnership agreement with a maintained school?  Yes  No

Do you work in partnership with another PVI establishment to provide funded early education?  Yes  No

How many weeks are you open each year?  Number Of Weeks

How many weeks in the current calendar year is the provider open and funded by the local authority?  
 Note: The provider is funded by the local authority for a maximum of 36 weeks within the full calendar year

Number Of Weeks

**Staff**  
 (Only count the staff number once and for their highest qualification only)

Total number by headcount of staff at provider who work with children aged under 5?  
 (This total should be the sum of the following 6 sections)

Total Staff At Provider

Total number, by headcount, of staff that have a full and relevant early years level 2 qualification who work with children aged under 5?

Number Of Staff With Level 2

Total number, by headcount, of staff with a full and relevant early years level 3 qualification and not in a managerial role who work with children

Number Of Staff With Level 3

Total number, by headcount, of staff with a full and relevant early years level 3 qualification and in a managerial role who work with children aged under 5?

Number Of Staff With Level 3 Managerial

Total number, by headcount, of staff with qualified teacher status who work with children aged under 5?

Number Of Staff With Qualified Teacher Status

Total number, by headcount, of staff with early years professional status who work with children aged under 5?

Number Of Staff With Early Years Professional Status

Total number, by headcount, of staff with early years teacher status who work with children aged under 5?

Number Of Staff With Early Years Teacher Status

**Number of children by age**

Number of 2 year olds? (Funded and non-funded) (age as at 31.12.2022)  
 (All 2 year olds at your setting)

Number Of Two Year Olds

Number of 3 year olds? (Funded and non-funded) (age as at 31.12.2022)  
 (All 3 year olds at your setting)

Number Of Three Year Olds

**Opening and Closing Times:**

When entering the start and end time, use a colon:

Example:

Start time 8am - enter as 8:00

Finish time 6pm – enter as 18:00

### Opening and closing times:

#### Daily Opening Times

Day	Start Time	End Time	Funded Places
Monday	8:00	18:00	<input checked="" type="checkbox"/>
Tuesday	8:00	18:00	<input checked="" type="checkbox"/>
Wednesday	8:00	18:00	<input checked="" type="checkbox"/>
Thursday	8:00	18:00	<input checked="" type="checkbox"/>
Friday	8:00	18:00	<input checked="" type="checkbox"/>

Insert item

### Staff

The Total number of staff cannot be more or less than all the boxes below it added together. Do not count a staff member more than once i.e, if a member of staff has more than one qualification, count them under their highest qualification.

E.g. Total staff = 10 made up of (2+4+2+0+1+1 =10):

Staff	
<i>(Only count the staff member once and for their highest qualification only)</i>	
Total number by headcount of staff at provider who work with children aged under 5? <i>(This total should be the sum of the following 6 sections)</i>	Total Staff At Provider
Total number, by headcount, of staff that have a full and relevant early years level 2 qualification who work with children aged under 5?	Number Of Staff With
Total number, by headcount, of staff with a full and relevant early years level 3 qualification and not in a managerial role who work with children	Number Of Staff With
Total number, by headcount, of staff with a full and relevant early years level 3 qualification and in a managerial role who work with children aged	Number Of Staff With
Total number, by headcount, of staff with qualified teacher status who work with children aged under 5?	Number Of Staff With
Total number, by headcount, of staff with early years professional status who work with children aged under 5?	Number Of Staff With
Total number, by headcount, of staff with early years teacher status who work with children aged under 5?	Number Of Staff With

### Guide:

- Refer to the **Guide for data collection** before completing the form

**Early Years Census 2023 - Guide for data collection**

Previous Page      Select Page:      >>>

**Information about children**  
Please record the normal situation during the week beginning 16th January 2023. If children are temporarily absent, for example, sick, on holiday please include them. If the provider was temporarily closed for any reason, record the situation which would normally have applied during that week.

**Section 2: General details of provision**  
Note: This relates to ALL children in your care.

**Section 2A - All types of provider must complete this section**  
Please tick the appropriate box to indicate the type of facility that you provide having read the guidance below:

If you are a private or voluntary provider, please enter a tick in either section 2A and then complete section 2B.

A childminder may be either independently registered with Ofsted or registered with a childminder agency which is registered with Ofsted.

**Section 2B - Private or voluntary providers only**  
You must complete this section if you have ticked either boxes in 2A

Provision for free early education is categorised / classified as full day care and seasonal day care. These are defined as:

**Full day care:**  
Facilities that provide day care for children under five for a continuous period of 6 hours or more in any day in premises which are not domestic premises. Times should be added as e.g eight am 8:00 six pm 18:00

**Seasonal day care:**  
Facilities where children under five attend day care each session being less than a continuous period of 6 hours in any day. Times should be added as e.g eight am 8:00 six pm 18:00

If you are a private or voluntary provider, you should have already ticked either option in 2A. Now tick 2B.

Other type: this category should only be used when a provider definitely does not fit into either of the categories in section 2B.

Other day care: this category should only be used when a provider definitely does not fit into full day care and seasonal day care e.g. after school clubs.

**Section 2C**  
Information about staff in this survey should relate to those who have been present in the week beginning 16th January 2023. If unusual circumstances occur that week (i.e. if premises are unavailable), please record usual staffing levels.

**Information is collected on staff qualifications:**

- Total number, by headcount, of staff who work with children aged under 5. This total should be equal to the sum of the following 6 sections.
- Number, by headcount, of staff with a full and relevant level 3 qualification who work with children aged under 5
- Number, by headcount, of staff with a full and relevant level 3 qualification\*\* and not in a managerial role who work with children aged under 5
- Number, by headcount, of staff with a full and relevant level 3 qualification who are in a managerial role who work with children aged under 5
- Number, by headcount, of staff with qualified teacher status who work with children aged under 5
- Number, by headcount, of staff with early years professional status who work with children aged under 5
- Number, by headcount, of staff with early years teacher status who work with children aged under 5

\*\*Staff with graduate level qualifications excluding EYRS, EYTS and QTS (for example BA Early Childhood Studies, Foundation Degree) should be recorded as Level 3 as their qualifications allow them to practice at Level 3 staffing ratios.

**Section 3: Child level data items**  
Child level data is required from any setting where one or more of their children (aged 2, 3 and 4 years as at 31st December 2022) are receiving early years education that is funded by the department via the local authority. The child details are taken from the Headcount return.

- When all details have been entered and checked, select **Submit**.

- The green tick line will appear

The screenshot shows a navigation bar with 'Home', 'Forms', 'Funding', and 'Sufficiency' tabs. Below the navigation bar, there is a green banner with a checkmark icon and the text 'You have successfully submitted the form.' Below this banner, there is a section titled 'Fill In Forms' with the instruction 'Please select a form below to update your details:'. Underneath, there are two bullet points: 'Early Years Census Form 2023' (which is highlighted with a yellow box) and 'PVI & M Provider Update Form'.

- The details are received by the Early Years Funding Team to **Accept**. If there is incompatible information on the form, the form will be **Denied**. An automatically generated email will be sent to notify if the the form is 'Denied'. This will mean that the form must be completed again in the correct format and re-submit. Please refer to the Guide for further Information.

## 8. SUFFICIENCY TAB: (not available to Childminders)

### Sufficiency Information Requirement (except for Childminders)

The Local Authority is collecting place and vacancy information each **Summer Term** for all 2, 3 & 4 year old places available via the Synergy Online Portal **Sufficiency** tab.

By completing this information, the setting is giving us a good insight into sufficiency in its local area. Being able to follow the trends in sufficiency helps us to locate areas of high demand and investigate the need to create more early years places to ensure parents can access their funding entitlement.

**Please note - this information must be completed each Summer Term during the Headcount period. The setting's final payment may be delayed if we have not received the sufficiency information.**

Figures should be based on the Headcount week's numbers in the Summer Term as advised in the Termly Information Letter.

The Sufficiency tab will be open and available for updating on the Provider Portal during the same submission period as for the Headcount claim.

## 8.1 How to enter Sufficiency Information (except for Childminders)

### 1) How to Calculate the number of Places:

Please use this guide to help with completing the Sufficiency information. **We recommend that the vacancy figures are prepared in advance, as the system will time out after 20 minutes of inactivity.**

#### Places Offered

These are the maximum number of places a setting is able to offer to parents, per age range on each day of the week, morning and afternoon (funded and paid for). For further support regarding the places the setting offers please contact your Business Support Officer:

[earlyyears@warwickshire.gov.uk](mailto:earlyyears@warwickshire.gov.uk)

#### Example:

If there is one room for all age ranges, places **MUST be** allocated separately to each of the particular age ranges, to ensure places are not double counted.

For Example: if a setting caters for 40 children (2-5yrs), for sufficiency purposes it must identify how many children it would offer places to per age range. Do **NOT** put 40 in each age range as this will distort the actual number of places on offer.

#### Example – 40

Age	Places	Places	places
2 to 3	15	40	
3 to 4	25	40	
<b>TOTAL</b>	<b>40 ✓</b>	<b>80 X</b>	

If the setting is closed or do not offer places on a particular day or time of day, a **zero** should be inserted in the relevant box. If the offered places change each day depending on the age ranges the setting has, the changes must be shown for each day.

#### Vacancies

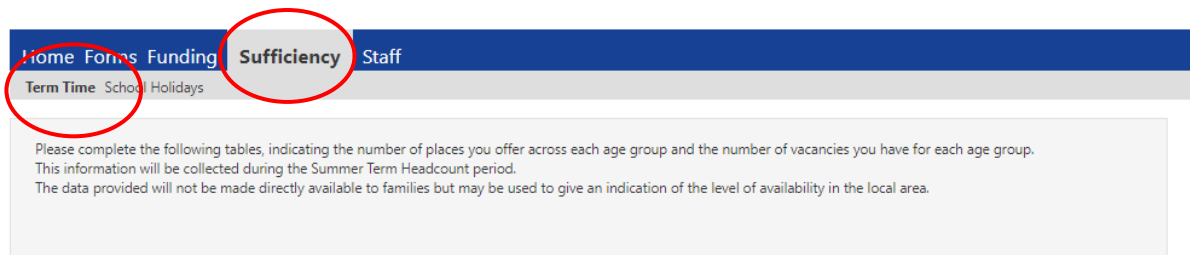
The number of vacancies for each age range must be completed for each day of the week and time (morning or afternoon).

**Example:** The setting offers **20** places and the actual occupancy is **15** children. The vacancy number to enter is  $20 - 15 = 5$ .

### 2) Inputting Data – Term Time

Log on to the Online Portal in the usual way.

The Sufficiency tab is at the top of the page



The screenshot shows a navigation bar with tabs: Home, Forms, Funding, Sufficiency, and Staff. The 'Sufficiency' tab is circled in red. Below the navigation bar, there are sub-tabs: Term Time, School, and Holidays. The 'Term Time' sub-tab is also circled in red. Below the sub-tabs, there is a text box with the following content:

Please complete the following tables, indicating the number of places you offer across each age group and the number of vacancies you have for each age group. This information will be collected during the Summer Term Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

#### Select Term Time



Select the Term and Year that is to be completed.

The following screen will be displayed:

Home Forms Funding Sufficiency

Term Time School Holidays

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

**School Holidays Sufficiency for 2022/2023 - Summer Term**

Save Cancel

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	0	0	0	0	0	0	0	0	0	20	0	0	0	0	0	▼	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	0	0	0	0	0	0	0	0	0	0	0	0	0	0	▼		
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0				

Save Cancel

**CHECK the Age Group List** – if the list does not show the correct age ranges that the setting offers (for example it only takes 3 & 4 year olds and there is a row for 2 year olds) please email [eyfunding@warwickshire.gov.uk](mailto:eyfunding@warwickshire.gov.uk), and ask for this to be amended.

*Making these changes before the start of the process a this will save time now and in future terms.*

Click Edit:

Home Forms Funding Sufficiency

Term Time School Holidays

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

**Term Time Sufficiency for 2022/2023 - Summer Term**

Edit Copy

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM					
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	2	▼	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0	▼	
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0			

Edit Copy

Home Forms Funding **Sufficiency**

Term Time School Holidays

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

**Term Time Sufficiency for 2022/2023 - Summer Term**

Save Cancel

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	0	▼	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0	▼	
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0	0		

Save Cancel

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The **Wait List** box allows a setting to insert the number of children on their waiting list by age for the term of input. Put 0 where there is not a waiting list


Insert the places offered in the **OFFERED** box across each day and time. Press the **TAB** button to move across the page. Put a zero where the setting does not offer the places.  
**CARE: Only enter 0 for Saturday and Sunday unless you are open**

Insert the **Vacancies** per age, per day per time. Press the **TAB** button to move across the page. Put a zero where the setting does not offer the places or where there are no vacancies.

**CLICK SAVE** – The green tick bar will confirm that the details have been submitted as below:

Home Forms Funding **Sufficiency**

Term Time School Holidays

 Saved Term Time 2022/2023 - Summer Term

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

**Term Time Sufficiency for 2022/2023 - Summer Term**

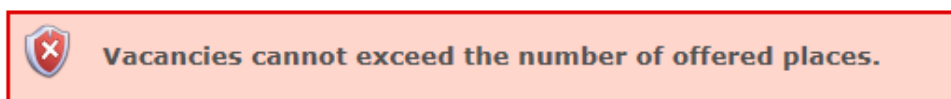
Edit Copy

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	2	▼	
	Vacancies	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0	▼	
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0	0		

Edit Copy

**NOTE:**

- A value **MUST** be insert against each item, even if it is zero.
- If more vacancies than places offered is entered, the setting will not be able to **SUBMIT** the information and the following error message will be shown.



Once saved the information input will immediately show in the LA's database.

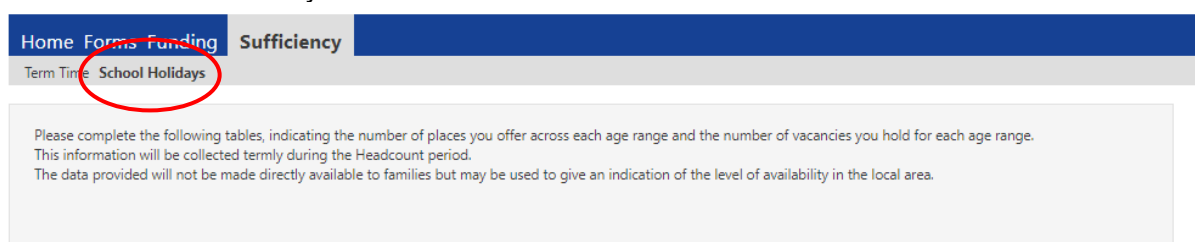
### 3) Inputting School Holidays:

Before completing this, please see Section 4 page 6 below on **Copying Information from Term to Term**.

**Select Sufficiency > Term Time and School Holidays**

**Select the correct Year and Term**

**Select – School Holidays**



Input the place details in the same way as shown for **Term Time**.

If details have been copied from Term to School Holidays, the details will be pre-populated.

**Select Edit** if the place numbers need to be changed.

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

School Holidays Sufficiency for 2022/2023 - Summer Term

Edit Copy

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	2		
	Vacancies	2	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0		
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0			

Edit Copy

Click Save when the details have been updated:

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

School Holidays Sufficiency for 2022/2023 - Summer Term

Save Cancel

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	2		
	Vacancies	2	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0		
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0			

Save Cancel

The green tick bar will confirm that the details have been submitted

✔ Saved School Holidays 2022/2023 - Summer Term

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

School Holidays Sufficiency for 2022/2023 - Summer Term

## 4) Copying Information from Term to Term:

The information can be copied to another term or to the School Holidays option. Therefore, if the setting's place numbers remain the same, only the vacancies will need to be updated.

The place numbers can also be amended if these have changed.

### Click – Copy

Home Forms Funding Sufficiency

Term Time School Holidays

Please complete the following tables, indicating the number of places you offer across each age range and the number of vacancies you hold for each age range. This information will be collected termly during the Headcount period. The data provided will not be made directly available to families but may be used to give an indication of the level of availability in the local area.

#### School Holidays Sufficiency for 2022/2023 - Summer Term

Age Group	Places	Mon		Tue		Wed		Thu		Fri		Sat		Sun		Wait List	Type	Cost Value
		AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM	AM	PM			
2 Year Old Places	Offered	20	20	20	20	20	20	20	20	20	20	0	0	0	0	2		
	Vacancies	2	0	0	0	0	0	0	0	0	0	0	0	0	0			
3 & 4 Year Old Places	Offered	32	32	32	32	32	32	32	32	32	32	0	0	0	0	0		
	Vacancies	12	12	6	7	7	9	9	8	9	9	0	0	0	0			

A box opens which gives the option to select the term the details are to be copied to from the dropdown box or to change the **Availability** to **School Holidays**:

Copy all the Sufficiency entries from Term Time 2022/2023 - Summer Term to:

Note: for the selected Availability and Year/Term, this will overwrite entries for existing Age Groups and insert entries for missing Age Groups.

Availability \*  Term Time  School Holidays

Year/Term \* 2022/2023 - Summer Term

Submit Cancel

Select the option you need, **Term Time**, **School Holidays** or **Year and Term**,

Click **Submit** – the information will then be copied to Term Time/School Holidays or the term selected, continue with the process above for Inputting data.