



DERBY CITY COUNCIL

Families Information Service FIS Provider Portal Guide



**A Guide for Private, Voluntary, Independent
Providers and Maintained Schools**

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Introduction to the Training Guide

The FIS Portal is a self-service tool for childcare providers, schools, groups and services within Derby City to use to register and update their service details on the Families Information Service webpages. It is also for childcare providers and schools in Derby City to update their staff information, register onto courses and submit headcount/EYPP information.

The FIS Portal is monitored and maintained by Derby City Council Families Information Service (FIS). If you have any questions about using or accessing the FIS Portal, you have a problem with the FIS Portal webpage or you want to talk to us about your service being on the FIS webpages you can contact us on:

Families Information Service
1st Floor
Derby City Council
The Council House
Corporation Street
Derby
DE1 2FS
Telephone: 01332 640758
Email: fis@derby.gov.uk

All courses and staff information is managed by the Learning and Inclusion team who can be contacted by emailing earlyyearstraining@derby.gov.uk

This training guide is designed to help anyone who is using the FIS Portal to:

- Register their service with FIS
- Update the service information that FIS holds about them
- Update the staff information that FIS hold about all the staff at your childcare provision
- Book onto childcare courses available to registered childcare providers
- Submit headcount information for 2, 3 and 4 year old funding
- Submit EYPP information for 3 and 4 year olds
- Submit DAF claim

The guide has a section on each of the uses shown above, and it will guide you through how to use the Portal in each situation and try to answer any questions you have.

We hope that by using the FIS Portal you will easily be able to update the information about your service without having to wait until you can telephone or email us.

By keeping the information FIS has about services, groups and events up to date we hope that the FIS website will be an excellent source of free information for everyone living or visiting Derby City. Why not check that your information is showing and that people using the website are able to see all the most up to date and important information about your service?

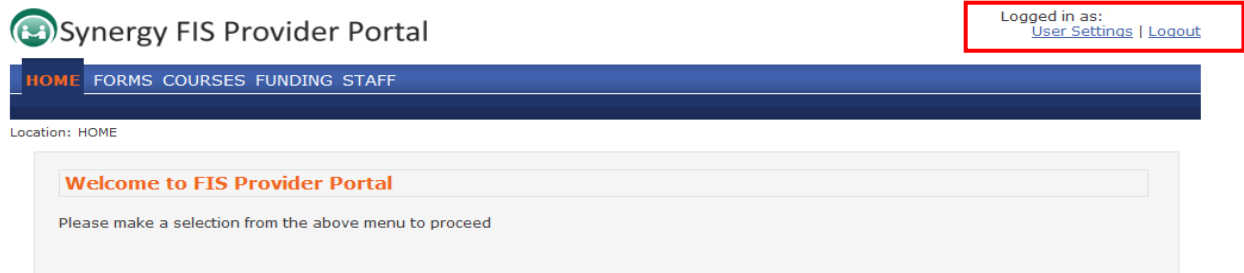
Logging in and changing your password

To access the FIS Portal visit the Childcare Provider's page on Derby City Council web site by following the link below:

<http://www.derby.gov.uk/community-and-living/childcare/childcare-providers/>

The Childcare Provider's web page has a lot of useful support information for childcare providers and we regularly update this page with key documents. Please take the time to look at the page, it may answer any queries you have on the funding and support you to successfully submit your updates and funding claims.

Once you click on the FIS portal link you will be taken to the FIS Portal login page. Enter the login details provided by FIS, the username is usually some or all of your provider name and the password is usually 'child' followed by two capital letters and two numbers i.e. childAV10. Once you have logged in the following home page screen should appear:

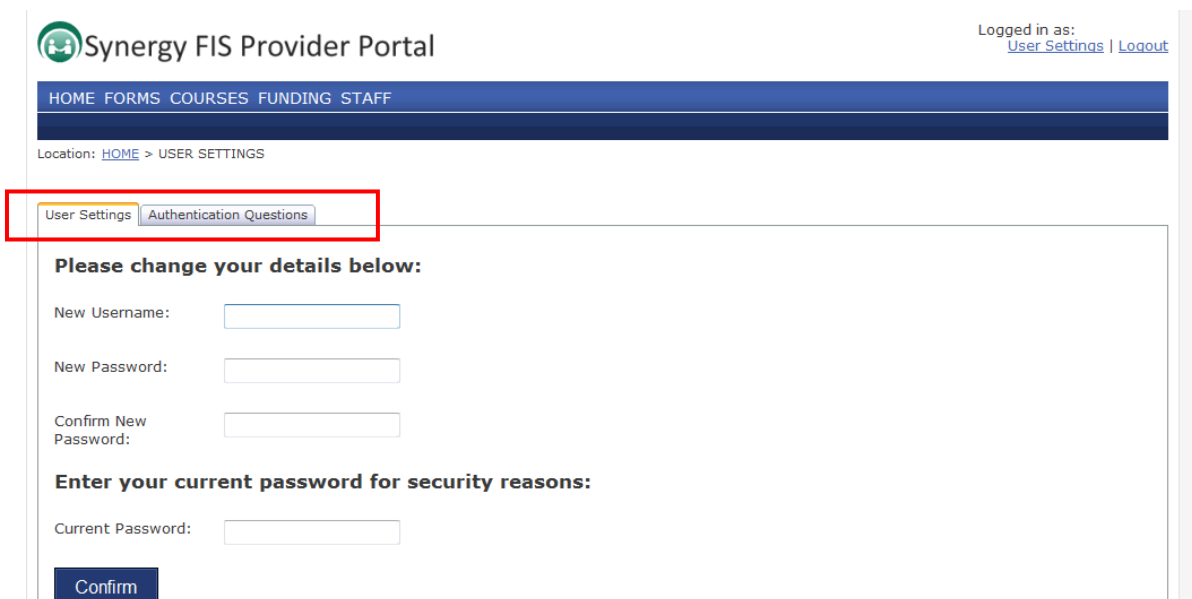


The screenshot shows the Synergy FIS Provider Portal home page. At the top left is the Synergy logo and the text 'Synergy FIS Provider Portal'. At the top right, a red box highlights the text 'Logged in as: User Settings | Logout'. Below this is a blue navigation bar with links: HOME, FORMS, COURSES, FUNDING, STAFF. Below the navigation bar, it says 'Location: HOME'. The main content area has a light grey background with a white box containing the text 'Welcome to FIS Provider Portal' and 'Please make a selection from the above menu to proceed'.

Changing your password – Go to 'User Settings' at the top right hand corner. If you do not know or have forgotten your password please contact FIS on 01332 640758 to reset your password. Once you have reset your password a green rectangular box will appear at the top of the screen to indicate new answer has successfully saved.

Please note passwords are case sensitive, however user names are not.

Password security standards – your password should be a minimum of 8 characters, made up of a combination of letters numbers, symbols, upper case and lower case, the more complex the better! Please remember this Portal contains personal data about children and your staff.



The screenshot shows the Synergy FIS Provider Portal User Settings page. At the top left is the Synergy logo and the text 'Synergy FIS Provider Portal'. At the top right, it says 'Logged in as: User Settings | Logout'. Below this is a blue navigation bar with links: HOME, FORMS, COURSES, FUNDING, STAFF. Below the navigation bar, it says 'Location: HOME > USER SETTINGS'. The main content area has a light grey background with a white box containing the text 'Please change your details below:'. Below this are three input fields: 'New Username:', 'New Password:', and 'Confirm New Password:'. Below these is another section titled 'Enter your current password for security reasons:' with a 'Current Password:' input field. At the bottom left of the white box is a blue 'Confirm' button. A red box highlights the 'User Settings' and 'Authentication Questions' tabs at the top of the main content area.

Once you have reset your initial login under '**User Settings**', you then need to reset your '**Authentication Questions**' however before you input any details on the right hand side of the page you firstly need to ensure '**Authentication answer**' is highlighted on the left hand side of the screen as shown below. The '**Old Answer**' is 'Fisofd'. Your new answer must start with a Capital letter, be 6 - 8 letters long and have no numbers in.

Synergy FIS Provider Portal

Logged in as: [User Settings](#) | [Logout](#)

HOME FORMS COURSES FUNDING STAFF

Location: [HOME](#) > USER SETTINGS

User Settings Authentication Questions

Authentication answer

Old Answer

New Answer

Confirm New Answer

Save

If you want to access your '**FUNDING**' tab you will always be asked to give 3 characters from your authentication question answer as below:

Synergy FIS Provider Portal

Logged in as: [User Settings](#) | [Logout](#)

HOME FORMS COURSES FUNDING STAFF

Location: [HOME](#) > SECURITY QUESTION

Security question

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

Authentication answer

Character 2 3 4

A A A

Submit

Forms Tab

To access the forms - select '**FORMS**' tab, select a form by double clicking. Please ensure you fully complete the form; some forms have more than one page and you will need to click '**Next Page**'. Once the form is fully completed (some forms also require you to enter the date of completion) then you click on '**Submit Form**', you should see a green successful submission bar appear at the top of the screen to confirm you have successfully submitted the form.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there's a navigation bar with tabs: HOME, FORMS (highlighted), COURSES, FUNDING, and STAFF. Below the navigation bar, there's a message: "Please select a provider from the drop down below" with a close button. To the right, it says "Signed in as: playgroup" with links for "User Settings" and "Sign Out". Below this, there's a "Manage Providers:" section with a dropdown menu showing "Test Playgroup (Pre-School Playgroup)". The main content area is titled "Fill In Forms" and contains a list of forms to update details. The list is enclosed in a red box and includes: 2 year Old Checker, Adjustment form V 1, Childcare Providers Quick Update Form v17, Copy of FEEE - Notification of Leaver, EYPP - Conformation Of Adoption Form, FEEE - Authorised Signatories Form, FEEE - Census Return, FEEE - ESOL (Weighting), and New Provider Form (groups).

Please see below for the purpose of each form and when the form needs to be completed:

FEEE - 2 Year Old Checker Form

This form can be completed and submitted by the childcare provider to check a child's eligibility for the Flying Start for two year olds. Please always ensure you read the Data Protection Statement to the parent/carer before you take any details from the parent.

FEEE - Adjustment Form

This form should be completed when a child starts at the childcare setting after the headcount deadline, this form is for new starters only, it cannot be used for children who started prior to headcount week and were accidentally not included in headcount. Funding will only be allocated from the week after headcount week.

FIS - Childcare Providers Quick Update Form

This form needs to be a completed **termly** by all childcare and service providers so that FIS holds accurate and up to date information on your service. Please complete this form even if there have been no changes as this will confirm that your information has stayed the same. Changes often include information such as contact details, telephone/mobile numbers, e-mail address, vacancies, opening time, costs, FEEE stretched offer models, and much more. Please note any changes to an Ofsted registered provider's contact details will firstly need to be updated with Ofsted who will then provide details to match and update the FIS systems.

Although you may be one organisation/registration, you may run many services, groups or events which each have to be listed as separate services on the database. This is because running times, age groups, costs and days will be different. If the services are not listed separately parents searching the FIS website will not find the information that they need and you might miss out on valuable trade. For example if you are a day nursery that also offers a before school and after school club then you will have three quick update forms to complete and submit:

- Day nursery – for the 0 -5 childcare
- Before school club – for the school age childcare, please include the schools that you drop off at
- After school club – for the school age childcare, please include the schools that you collect from

To select which service you want to update, click on the drop down list which is on the top right hand side of the page, below you can see that we have selected Derby City Council – Families Information service.

The final page of the **Childcare Providers Quick Update Form** is where you give us your permission to advertise your service, all childcare providers who deliver funded childcare places for 2, 3 and 4 year old are expected to give their consent to make their service information available on-line. Providers who are not offering funded childcare can give consent to make their service information available on-line as this is useful free advertising however for non-funded providers this is optional. Please make sure that before you submit your form that you have added a new date in the date box highlighted below.

FEED - Notification of Child Leaver Form

This form only needs to be completed if a child leaves your provision after the headcount deadline and 10 days before the end of a term. Funding is not adjusted but this helps FIS with sign-posting parents to provisions that could offer funding if parents enquire after the headcount deadline and also forms part of the FEED Audit for Attendance Monitoring. Please note we will start adjusting funding paid to reflect children leaving commencing April 2018.

FEED - EYPP Confirmation of Adoption Form

If you think that a child who is receiving 3 and 4 year old funding at your setting has been adopted you must discuss this with the parents and explain to them that the child is eligible to receive EYPP due to the adoption. Explain that EYPP is paid directly to the setting and the additional funding is available to enhance the early educational experience for their child. If the family are happy for you to apply for EYPP then you will need to see the adoption order and record the order number on this form and submit to Derby City Council to support the claim.

FEED - Authorised Signatory Form

This form will need to be completed to inform FIS of who the principle signatory and secondary signatory is for your provision, this person will be held responsible for all data submitted through the FIS Families Information Service

Portal and be the main contact/s for any queries in relation to the funding. You only need to submit this form once, and then resubmit if there are any changes to either of the signatories.

FEEE – Census Return Form

This form will only need to be submitted annually in January as part of your Spring Term headcount, this data is sent to the Department of Education (DfE) and contributes to the calculation of the Council's annual budget for FEEE so is very important and must be completed and submitted by the Spring Term headcount deadline each year which is stipulated on the funding timetable.

FEEE – Child's First Language

This form needs to be completed when a funded 3 and 4 year child's first language is not English. It should only be completed for **new children at the start of each term** and be submitted by the headcount deadline stipulated on the funding timetable. This data is required to determine whether your provision is allocated any additional funding. If a child's first language is not English, your provision will be allocated an extra 0.20p per hour for each hour the child is funded.

FIS - New Provider Form (pvi) (childminder)

This form should only be completed by providers who have been newly registered by Ofsted it will provide FIS with the detailed information that we will use to advertise your service on our website and via the FIS helpline. Parents will see this information so please tell us all the wonderful things that you do, so that parents can make informed choices when deciding which childcare they want to use. This information is displayed on the Addition Information section where you can write freely about your service and how you meet children's individually care needs. Don't forget that FIS offer you a free marketing opportunity which is trusted by parents and professionals across the city.

FEEE – Confirmation of DAF Eligibility

This form needs to be submitted for any children included on 'Actual' Headcount as eligible to receive a DAF payment. The form should only be completed by the provider once they have seen a copy of the Disability Living Allowance (DLA) and taken note of the DLA's reference number.

View Forms submitted

You can view forms you have previously submitting and check their status by selecting the '**FORMS**' tab and then '**View Forms**' the forms will have a status at the end to say if they have been Authorised or Denied. Forms are usually Denied if they have been submitted more than once, a blank form has been submitted or the form has not been completed within the guidelines given in this guidance. If there are any problems that we can not sort out we will contact you directly to discuss.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with links: HOME, FORMS (highlighted), COURSES, FUNDING, and STAFF. Below this, there is a sub-navigation bar with links: Fill In Forms and View Forms (highlighted). A red box highlights the 'View Forms' link in the sub-navigation bar. To the right of the sub-navigation bar, there is a message: 'Please select a provider from the drop down below' with a close button. Below this, there is a dropdown menu labeled 'Manage Providers:'. The main content area is titled 'View Forms' and contains a section 'Select a form below to view:' with a list of form entries. Each entry includes a link to the form, the date and time of submission, and the status (Authorised or Denied).

Logged in as: [User Settings](#) | [Logout](#)

HOME FORMS COURSES FUNDING STAFF

Fill In Forms View Forms

location: HOME > FORMS > VIEW FORMS

Manage Providers: [Dropdown]

View Forms

Select a form below to view:

- [FEEE - ESOL \(Weighting\) \(24/06/2015 19:53:11 - Authorised\)](#)
- [FEEE - ESOL \(Weighting\) \(24/06/2015 19:52:29 - Denied\)](#)
- [FEEE - Notification of Leaver \(24/06/2015 19:51:55 - Authorised\)](#)
- [FEEE - ESOL \(Weighting\) \(02/03/2015 16:53:02 - Authorised\)](#)
- [FEEE - Notification of Leaver \(12/01/2015 17:07:54 - Authorised\)](#)
- [FEEE - Notification of Leaver \(12/01/2015 17:06:28 - Authorised\)](#)
- [FEEE - Notification of Leaver \(12/01/2015 17:04:50 - Authorised\)](#)

FUNDING TAB

Please be aware the Council is considering implementing a charging policy for late returns. This is currently under review and further details will be communicated to you when a final decision has been made. Please note that neighbouring Local Authorities have already implemented a charging policy

Estimate Claims for 2, 3 and 4 Year Olds (Universal and Extended Hours)

Estimate claims must be submitted via the FIS Portal by the estimate submission dates supplied on the funding timetable for each term. To submit your estimates you will need to calculate the total weekly amount of funded hours inclusive of any extended entitlement. You will need to submit your 3/4 year olds and 2 year olds separately.

If you do not submit your estimates by the deadline stipulated on the funding timetable you will not be paid an estimated 60% amount and you will have to wait for your actual headcount payment to be made at 100%.

If you do not have any funded children for the term you do not have to submit an estimate amount.

Estimate claims need to be a true reflection of anticipated participation of funded hours for the following term. Providers must be aware that over-claiming estimate amounts will result in an overall minus payment at actual headcount and funding will be recouped. If a provider is identified as continually over-claiming, the estimate funding may be withdrawn and you will only be able to submit details at the 'Actual' headcount stage. You will need to refer to the number of funded weeks in each term on your timetable in order to calculate the estimated amount. (Autumn 14 weeks, Spring 12 weeks, Summer 12 weeks).

Example of calculating hours in a 14 funded week term for estimate submission:

Provider has 4 children 2 claiming 15 hours per week and 2 claiming 30 hours extended entitlement per week:

2 x 15 hours = 30 hours

2 x 30 hours = 60 hours

Provider enters 90 weekly hours onto the FIS Portal.

The FIS Portal multiplies weekly hours by 14 weeks which equals 1260 termly hours. This 1260 figure will be submitted to Derby City Council.

Stretched funding Estimate weekly hours need to be recorded on the FIS Portal as term time weekly hours.

Example 1 - if a child is taking a stretched model of 22 extended hours a week they will need to be included in your estimate as 30 hours.

Example 2 - if a child is taking a stretched model of 11 universal hours a week they will need to be included in your estimate as 15 hours

Example of calculating estimate in a 14 week term including stretched funding:

Provider has 4 children, 2 claiming 15 hours per week, 1 child taking stretch funding claiming 12 universal hours per week over 47.5 weeks of the year and 1 child taking stretch funding claiming 22 hours over 52 weeks of the year, you will calculate as follows:

2 x 15 hours = 30 hours

1 x 15 hours = 15 hours

1 x 30 hours = 30 hours

Provider enters 75 weekly hours onto the FIS Portal

FIS Portal multiplies weekly hours by 14 weeks which equals 1050 termly hours. This 1050 figure will be submitted to Derby City Council.

To Claim Estimate Funding:

1. Select '**FUNDING**' tab
2. Select '**Estimates**' option
3. Click on '**Select**' in the first column to open the relevant funding year/term to submit your estimates against. Please take care to choose the correct term and funding type.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there's a navigation bar with 'HOME', 'FORMS', 'COURSES', 'FUNDING' (highlighted), and 'STAFF'. Below this is a sub-navigation bar with 'Summary', 'Estimates' (highlighted), 'Actuals', 'Adjustments', and 'Eligibility Checker'. A message box says 'Please select a provider from the drop down below'. Below that, a dropdown menu shows 'Test Playgroup (Pre-School Playgroup)'. The main section is titled 'Provider Headcount Records'. It has a table with columns: 'Estimates', 'Year', 'Term', and 'Funding Type'. The table has three rows, each with a 'Select' button in the 'Estimates' column. The first row is for 'Academic Year 2017/18', 'Summer', and '3 & 4 Year Old Funding'. The second row is for 'Academic Year 2017/18', 'Spring', and '3 & 4 Year Old Funding'. The third row is for 'Academic Year 2017/18', 'Autumn', and '3 & 4 Year Old Funding'. There are 'Previous', 'Page: 1', 'Next', and '[3 Results]' links.

4. Once you open a term and funding type the screen will look as below, you need to input the number of weeks you would like to claim for the term, this is always stipulated on the second row of your funding timetable for each term titled '**Number of weeks funded by LA**'. If you will be providing less than 38 weeks a year you should input the exact number of funded weeks that you are going to be providing each term.
5. Input your total estimate number of funded hours per **week** for the term and select '**Calculate**', the total number of hours for the term will then calculate and appear at the side of the funded weekly hours you entered. The screen below gives an example estimate claim for four children; two children claiming 15 hours of funding a week and two children claiming for 30 hours per week.
6. Click on '**Send Claim**' and this will be sent to FIS.

The screenshot shows the 'Submit Estimate' form in the Synergy FIS Provider Portal. The form is titled 'Submit Estimate: Academic Year 2017/18 Autumn - 3 & 4 Year Old Funding' with a 'CHANGE' link. It has two input fields: 'Number of Weeks for this Term' with a value of '14.00' and 'Estimate Number of Funded Hours Per Week for this Term' with a value of '90'. Below these fields, it says 'There are 1,260.00 Hours in this Term' and 'Please enter both numbers, click 'Calculate', then 'Send Claim''. There are two buttons: 'Calculate' and 'Send Claim'.

7. A green box will appear at the top of the screen to confirm you have successfully submitted your claim to FIS. If you do not see this please contact FIS on 01332 640758 to check your claim has successfully sent.

Please Note: If your estimates change you can resend this data anytime up until the deadline date for estimate submissions. Please be aware if you over estimate your claim at this point funding will be reclaimed at Actual Headcount. Continual over claims will be investigated and Derby City Council reserves the right to withdraw estimate funding and only pay on Actuals.

Actual Headcount Claims Universal Hours

Claiming 2, 3 and 4 Year Old Universal Entitlement Only

Actual claim records must be submitted by the **headcount deadline stipulated on the FEEE Funding timetable** which can be found on the Provider Webpage. Once FIS has carried forward children from the previous term we will email out to all providers to let you know you can start submitting your claims for the current term. Please remember as soon as a term is opened on the FIS portal you can start to submit claims. You can do this in multiple visits as the system saves unsent information until it is submitted. If you send your claim and need to add something or correct it, you can add or alter the information and re-submit it up until the deadline date stipulated on the funding timetable. If you have the information available early please submit this to us as this helps us sort out any queries with data and double funding and process claims in time to make payments.

The funding details screen layout for standard universal hours has changed to allow for submission of extended hours.

To submit a claim for a child taking universal hours only:

1. Go to Funding > Actuals > select the relevant term and funding type.
2. To enter your claim details click on 'select' in the first column to open the correct funding year/term and type, taking care to select the correct term and age group.

The screenshot shows the Synergy FIS Provider Portal interface. The user is signed in as 'playgroup'. The navigation bar includes 'HOME', 'FORMS', 'COURSES', 'FUNDING' (highlighted), and 'STAFF'. Below the navigation bar, there are tabs for 'Summary', 'Estimates', 'Actuals' (highlighted), 'Adjustments', and 'Eligibility Checker'. A message box says 'Please select a provider from the drop down below'. The 'Manage Providers' dropdown shows 'Test Playgroup (Pre-School Playgroup)'. The main section is titled 'Provider Headcount Records'. It shows a table with columns: 'Actuals', 'Year', 'Term', and 'Funding Type'. The 'Actuals' column contains 'Select' links. The table lists records for 'Academic Year 2017/18' across 'Summer', 'Spring', and 'Autumn' terms, with funding types '2 Year Old Funding' and '3 & 4 Year Old Funding'.

Actuals	Year	Term	Funding Type
Select	Academic Year 2017/18	Summer	2 Year Old Funding
Select	Academic Year 2017/18	Summer	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Spring	2 Year Old Funding
Select	Academic Year 2017/18	Spring	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Autumn	2 Year Old Funding
Select	Academic Year 2017/18	Autumn	3 & 4 Year Old Funding

Eligible children from the previous term will show, as in the screen below, however if it is your first term claiming no child data will appear. All funded hours are put back to zero so you must go in and update hours for each child carried forward.

The screenshot shows the 'Submit Actual' screen for 'Academic Year 2017/18 Autumn - 3 & 4 Year Old Funding'. The user is signed in as 'playgroup'. The navigation bar is the same as the previous screenshot. The main section is titled 'Submit Actual: Academic Year 2017/18 Autumn - 3 & 4 Year Old Funding'. There are buttons for 'Add Child' and 'Send Claim'. Below these buttons is a table with columns: 'Status', 'Child Name', 'Funded Hours (inc Adj)', 'Total Funding Amount for Term (inc Adj)', and 'Child Weightings'. The table lists two children: 'Bob, Billy (01-Sep-2014)' and 'Chain, Daisy (30-Apr-2014)', both with 'Unchanged' status, '0.00' funded hours, and '£0.00' total funding.

Status	Child Name	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
Unchanged	Bob, Billy (01-Sep-2014)	0.00	£0.00	
Unchanged	Chain, Daisy (30-Apr-2014)	0.00	£0.00	

Existing Children

- It is important that you check that all the details of the children who have been carried forward are correct (i.e. full legal name of child is included and spelt correctly and the hours you are claiming are correct).
- When children are carried forward into the next term all funded hours are set back to zero you must update funded hours for all children or you will not receive any funding for them this includes EYPP and weighting funding.
- You must also make sure in autumn term all 4 year old children that have gone up to school are removed from your autumn term claim.

1. To amend an existing child's record select the child's name that is in orange, the screen will open up to the 'summary' tab as below. Once all details have been submitted and processed by Derby City Council you can check your child summary to see what payment you will receive for the child.

HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Name: Billy Bob DOB: 01-Sep-2014

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

Term Start Date	04-Sep-2017	Universal Funding	
Term End Date	31-Dec-2017	Funded Hours Per Week	0.00
No of weeks attended	14.00	Funded Hours for Term	0.00
Nominated for DAF	No		
Provider Total Rate	£4.05	Funding Amount @ Provider Rate	£0.00
		Child Weightings	£0.00
		Universal Funding Amount	£0.00
		Totals	
		Funded Hours Per Week	0.00
		Funded Hours for Term	0.00
		Total Funding (excl. Adj)	£0.00
		Total amount from Adjustments	£0.00
		Total Funding For Term (inc Adj)	£0.00

2. Select the 'child details' tab to check child core data as below:

HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Name: Billy Bob DOB: 01-Sep-2014

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

Child Details

Forename* Billy

Middle Name

Surname* Bob

DOB* 01-Sep-2014

Proof of DOB ☒

Gender* ☒ Male ☐ Female

Preferred Surname

Ethnicity* White British

SEN COP Stage <Unknown>

Address

Address Line 1* 84 Hawthorn Street

Address Line 2

Address Line 3

Locality

Town Derby

County

Postcode* DE24 8BB

Save

Cancel

*denotes mandatory fields

3. Select 'Funding Details' and ensure all boxes are completed, universal and non-funded hours will need to be updated as these are set back to zero when data is carried forward from the previous term, **failure to update funded hours will result in a nil claim and you will not receive any funding for the child.**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Name: Billy Bob DOB: 01-Sep-2014

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

Funding Details		Attendance Days	
Start Date*	04-Sep-2017	Attends Monday	<input checked="" type="radio"/> Yes <input type="radio"/> No
End Date*	31-Dec-2017	Attends Tuesday	<input checked="" type="radio"/> Yes <input type="radio"/> No
Default Term Dates		Attends Wednesday	<input checked="" type="radio"/> Yes <input type="radio"/> No
Weeks Attended in Term*	14.00	Attends Thursday	<input checked="" type="radio"/> Yes <input type="radio"/> No
Present during Census	<input checked="" type="checkbox"/>	Attends Friday	<input checked="" type="radio"/> Yes <input type="radio"/> No
Attends Two Days or More	<input checked="" type="checkbox"/>	Attends Saturday	<input type="radio"/> Yes <input checked="" type="radio"/> No
Nominated for DAF*	<input type="radio"/> Yes <input checked="" type="radio"/> No	Attends Sunday	<input type="radio"/> Yes <input checked="" type="radio"/> No
Universal Funded Hours per Week		Non-Funded Hours per Week	
Universal Hours*	15	Non-Funded Hours*	0.00 x

Save Cancel *denotes mandatory fields

Please note term start and end dates are automatically populated and are set much wider than the actual term dates this allows for children taking up the stretched offer. Please adjust the term start and end date if the child is only taking funding across term time, term dates can be found on the FEEE funding timetable.

4. If you think a child will meet the criteria to receive EYPP you will need to add parent/carer details, as shown in the screen below:

Synergy FIS Provider Portal

Signed in as: playgroup
User Settings | Sign Out

HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Name: Billy Bob DOB: 01-Sep-2014

Summary Child Details Funding Details **Parent / Carer 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	Becky	Forename	
Surname	Bob	Surname	
DOB	12/08/1974	DOB	
<input checked="" type="checkbox"/> NI or <input type="checkbox"/> NASS Number	PX745465C	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number	

Save Cancel *denotes mandatory fields

5. Click on 'Save' the status will change to 'Edit Pending' and there will be an exclamation mark to indicate the claim has not been submitted.

HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

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

Not submitted

Add Child Send Claim

		Status	Child Name	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Edit Pending	Bob, Billy (01-Sep-2014)	210.00	£0.00	
		Unchanged	Chain, Daisy (30-Apr-2014)	0.00	£0.00	

Add Child Send Claim

6. Click on '**Send Claim**' button at the the top or bottom of the page to submit your claim to FIS, once you have done this the status should change to '**Edit Pending**', '**Submitted**' as shown in the screen below.

HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Submission Successful

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

Add Child Send Claim

		Status	Child Name	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Edit Pending, Submitted	Bob, Billy (01-Sep-2014)	210.00	£0.00	
		Unchanged	Chain, Daisy (30-Apr-2014)	0.00	£0.00	

Add Child Send Claim

7. Once FIS have accepted and updated your amendment the status will revert back to '**Unchanged**' for the claim.

You can continue to make ammendments up until the headcount deadline for the term, which is stipulated on the FEEE Funding timetable; **please do not wait until headcount week to submit claims as this may affect how quickly any queries can be resolved.**

8. If you decide not to send your amendments straight away using the '**Send Claim**' button, the next time you log onto the FIS Portal you will see the message below on screen. This message is to remind you that you have made changes which have not been sent. If you see this message after the submission deadline please contact us on 01332 640758.


Welcome to FIS Provider Portal

Please make a selection from the above menu to proceed

Notifications

▶  [There are unsubmitted child funding records for provider: Test Playgroup - Pre-School Playgroup](#)

Deleting Children


1. Click on the  icon to '**Request Delete**' headcount record, the screen will show as below, select 'Yes' to remove the child from your headcount.

Synergy FIS Provider Portal

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

HOME FORMS COURSES **FUNDING** STAFF



Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below 

Manage Providers: Test Playgroup (Pre-School Playgroup) ▼

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

Add Child

		Total Funding amount for Term (inc Adj)	Child Weightings
	Request Delete Are you sure you want to request the deletion of child: Bob, Billy from this headcount record? Delete requests are automatically submitted but can be cancelled.	£850.50	
	<div>Yes No</div>	£0.00	

Add Child

2. The status will change to '**Delete Pending**', '**Submitted**'. Please note if '**Yes**' is selected by mistake this can be undone; status will change to '**Cancel Delete**'.
3. Please note requests to delete children are automatically submitted even if you do not click on the '**Send Claim**' button. It is still possible to cancel the delete at this stage providing we have not accepted the deletion. To cancel the delete select '**Cancel Delete**'.
4. Once we have accepted the deletion the child will disappear completely from the screen. If at this stage you realise you have deleted a child in error you will need to add the child back on as a new child.

Adding Children

1. Select 'Add Child' to input new children, the screen will open to 'child details tab' as shown on the screen below

Synergy FIS Provider Portal Signed in as: **playgroup**
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HOME FORMS COURSES FUNDING STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Child Details Funding Details Parent / Carer Details

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

2. Complete the **Child Details**, this section asks for all details that are on the **Parental Contract**, as a minimum you must ensure you fill out all fields marked with * as mandatory.
Tick in the box to state you have seen child's Proof of DOB, **and it is very important that you do not put anything in the 'SEN COP stage' box**

3. Click on 'Funding Details' tab.

HOME FORMS COURSES FUNDING STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below

Manage Providers: Test Playgroup (Pre-School Playgroup)

Child Details **Funding Details** Parent / Carer Details

Funding Details

Start Date*

End Date*

Default Term Dates

Weeks Attended in Term*

Present during Census ☐

Attends Two Days or More ☐

Nominated for DAF* ☐ Yes ☐ No

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*

4. **Term start date and end dates** will automatically be populated and will not reflect the actual term time dates as this section is also used for validating the stretched offer so the three terms have to consistently run across a 52 week year. Please adjust this to reflect what dates the child is actually attending.
5. The '**present during census**' box should be ticked for all children on your 'Actuals' headcount that have registered by headcount date.

6. **Nominated for DAF** – Please select 'yes' or 'no' to state if a child is in receipt of Disability Living Allowance. If 'yes' is selected you will need to submit evidence of DLA using the FEEE - DAF form which can be found in the FORMS tab of the FIS Portal.
7. **Attends Two Days or More** box - should be ticked for all children claiming 15 hours; it is not possible to claim more than 10 hours in one day and 15 hours must be taken over a minimum of 2 days. If you do not tick the 'Attends Two Days or More' box and the claim is over 10 hours the system will give an error message.
8. **Attendance Days** – state the days the child is signed up per the 'Parental Contract' up to receive funded hours
9. **Universal Hours** - enter a maximum of 15 hour a week, this can be taken across no more than two sites in any one day. Schools claiming EYPP need to put in the number of weekly hours claimed on the school census; 15 hours equates to a full-time child.
10. **'Non-funded hours'** per week – enter the number of hours paid for by the parent.


Early Years Pupil Premium (EYPP)

1. **Parent / Carer Details** - if a parent has completed a 'Parental Contract' giving written consent to check eligibility for Early Years Pupil Premium (EYPP) then please click on the '**Parent/Carer Details**' tab. **Please Note EYPP can only be claimed by the provider who the parent has nominated on the 'Parental Contract' as the main provider who is delivering the FEEE Universal funded hours.**
2. You will then need to enter the parents's forename, surname, date of birth, National Insurance Number (2 letters, 6 numbers 1 letter) or National Asylum Support Service (NASS) Number (9 digits).
3. FIS will undertake termly EYPP batch checks after the headcount deadline, once all data is in and processed. Each term the child's claims will carry forward into a new term, we will only check new children you add into the new term. Each autumn term (September) we will re-check all children on the system who have parent/carer details completed for EYPP.
4. EYPP checks will be updated and shown under the **Actuals tab** against the child data. If a child has been found eligible for EYPP '**EYPP E**' will be shown in the column titled '**Child Weightings**' and the system will put a date in the '**last ECS Date**' column to evidence when the child has been checked. If there is nothing in the '**Child Weighting**' column but a date has been produced in the '**last ECS Date**' column next to a child this means the child has not been found eligible.

 Synergy FIS Provider Portal Signed in as: **playgroup**
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HOME FORMS COURSES **FUNDING** STAFF

Summary Estimates **Actuals** Adjustments Eligibility Checker

Please select a provider from the drop down below 

Manage Providers: **Test Playgroup (Pre-School Playgroup)** ▼

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

You will need to repeat this process for all new children. Don't forget to Select '**Send Claim**' to submit your claim for processing.

Extended Entitlement

Extended Entitlement, branded by the government as the 30 hour offer, enables parents of qualifying children to claim up to an additional 15 hours of funding on top of their universal 15 hours per week which equates to 1140 hours per year that can be taken over a minimum of 38 weeks a year. The 1140 hours per year can also be taken more flexibly by stretching funding over a maximum of 52 weeks and taking less funded hours per week.

Parents must apply to confirm eligibility for the Extended Entitlement by making an online application through the HMRC website at <https://www.childcarechoices.gov.uk/> or by ringing 0300 123 4097.

Parents that qualify will be issued with an 11 digit code. In order to take up a funded place for Extended Entitlement parents will have to present this code to you, the childcare provider, who in turn must verify that the code is a valid code by using the eligibility checker functionality under the '**FUNDING**' tab on the FIS portal, as detailed below:

Extended Entitlement Code Validation

1. Go to FUNDING > Eligibility Checker and click on the 30 Hours Free Childcare box shown on the above screen and enter the 11 digit voucher code, child's date of birth and parents national insurance/NASS number to do the check.

Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers: Test Childminder (Childminder)

Eligibility Checker

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

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

30 Hours Free Childcare

2. Once the check is complete a green box will appear at the top of the screen to state the details have been found and the code is eligible. This code has now been successfully validated and the child can be added onto your termly headcount.

Synergy FIS Provider Portal

Signed in as: **childminder**
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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers: Test Childminder (Childminder)

✓ The details provided have been found:

Eligibility Code: 23043000000
Code Start Date: 06-Aug-2017
Code End Date: 18-Oct-2017
Grace Period End Date: 18-Oct-2017

Eligibility Checker

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

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

30 Hours Free Childcare

3. If the code is not eligible or details are have been incorrectly entered a red box will appear at the top of the screen with an error message, please check with the parent / carer that all details are correct, if they are and you still get the error message then the parent/carer will need to contact 30 hour gateway helpline on 0300 1234 097 to obtain proof of eligibility so the claim can go onto the portal.

Important points to consider:

- Codes are only valid from the start of the term after the one in which they are issued. For example; a parent issued with a code in September cannot take up their Extended Entitlement until January. They can access their universal entitlement based on date of birth as normal.
- Codes are only valid for 3 months. Parents must reconfirm their details with HMRC with the last month of their validity period. HMRC will remind parents by email and / or text message.
- Parents that do not reconfirm their details in time or whose details have changed enough to put them out of the eligibility range will become ineligible and will fall into the Grace Period. Funding will continue until the end of this period. The Grace Periods are set out in the table below.
- The local Authority will carry out Audit checks on codes at 6 points throughout the year as per the audit timetable below:

LA Audit	LA Audit date:	Validity end dates:	Grace Period End date:
Spring: Mid-term	11 February	1 Jan – 10 Feb	31 March
Summer: Start of term	1 April	11 Feb – 31 March	31 August
Summer: Mid-term	27 May	1 April – 26 May	31 August
Autumn: Start of term	1 September	27 May – 31 August	31 December
Autumn: Mid-term	22 October	1 September – 21 October	31 December
Spring: Start of term	1 January	22 October – 31 December	31 March

- Parents that have fallen into the Grace Period because they have forgotten to reconfirm their details can reapply through HMRC.
- As long as the same parent re-confirms or reapplies the code will remain the same but the end date will change.

In order to claim correctly providers will need to understand how the parent wishes to take up their funding. This is particularly important where a child is claiming across multiple providers. Providers will need to know which hours are Universal and which hours are Extended. Parents should confirm this information by completing the 'Parental Contract' and the provider's 'Actual' headcount claim should reflect this by separating out the hours on the FIS Portal.

Claiming the Extended Entitlement

To claim for a child who is accessing the Extended Entitlement go to 'Actuals' tab then select the required term.

1. Complete the '**Child Details**' tab as described in previous guidance then go to the '**Funding Details**' tab
2. Enter the '**Term start/end date**'
3. Enter '**Weeks Attended in the Term**'

3a. **For term time only** children the 'Weeks Attended in the Term' should be the number of weeks you are claiming for that child up to the maximum term time funded weeks available as stipulated on the term time funding time table (for example 14 weeks for autumn term). If the child is with you for less than 14 weeks you should only be claiming the actual number of weeks the child is with you for.

3b. **For stretched funding** children the 'Weeks Attended in the Term' box should be populated with the number of weeks that the child is accessing funding for in that term using the maximums stipulated on the stretched attendance dates.

4. Complete the following boxes:
 - Present during census (if applicable)
 - Attends Two days or More (if applicable)
 - Nominated for DAF (if applicable)
 - Stretched Entitlement (if applicable)
 - Attendance Days
5. Enter the number of **'Universal Hours'** in the box. If a child is claiming Extended Entitlement only enter 0 in this box.
6. Extended hours – enter the number of extended hours above the 15 Universal hours in this box.
7. Enter the **Eligibility Code**
8. Go to the **Parent/Carer Details** tab and enter the parent / carer details
9. Go back to the Funding Details tab and click the 30 Hour Free Childcare button.
10. The results of the check will be displayed.
11. If the code could be found and it is still a valid code then the portal will let you submit hours for extended hours.
12. If the eligibility code cannot be found, an error message will be displayed at the top of the screen informing you of the reason for the error and you will only be able to submit 'universal hours'. If you get an error message check the information has been input correctly. If the parent confirms all details are correct, the parent will need to contact the 30 hour Gateway helpline on 0300 124 097 to obtain confirmation to evidence the code is valid.

Please note: The Council has no jurisdiction over a child's eligibility for Extended Entitlement. If a parent wishes to challenge the eligibility result they will have to contract HMRC directly.

13. Enter the **'Non Funded Hours per week'**
14. Click **'Save'**

Disability Access Funding

3 and 4 year old children who are in receipt of Disability Living Allowance (DLA) and who are claiming the universal FEEE funding can receive an extra £615 per year. This is a one off payment, paid to the provider who the parent nominates as the main provider, it can only be paid once during the financial year. This funding does not move with the child. The parent must indicate on their 'Parental Contract' which provider they wish the funding to go, this is particularly important if they are claiming funding across multiple providers.

Providers must see and retain evidence that the child is in receipt of DLA.

Claiming Disability Access Funding

1. You must select either 'Yes' or 'No' option for all children. You must only select the 'Yes' option if you have seen and retained evidence that the child is in receipt of DLA and the parent has nominated you to receive the DAF on the 'Parental Contract'. You must submit a FEEE - DAF form which can be found under the FORMS tab of the FIS Portal to evidence your claim.
2. If you have selected 'Yes' in a previous term for a specific child you must continue to select 'Yes' every term until the end of the academic year. If you select 'No' on a child that was previously marked as 'Yes' your funding may be recouped.

Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers: **Test Childminder (Childminder)**

Child Details **Funding Details** Parent / Carer Details

Funding Details

Start Date*
End Date*
Default Term Dates
Weeks Attended in Term*
Present during Census
Attends Two Days or More
Nominated for DAF* ☒ Yes ☐ No
Stretching Entitlement

Attendance Days

Attends Monday
Attends Tuesday
Attends Wednesday
Attends Thursday
Attends Friday
Attends Saturday
Attends Sunday

Universal Funded Hours per Week

Universal Hours*

Extended Funded Hours per Week

Extended Hours*
30H Eligibility Code
30 Hours Free Childcare
Eligible for 30H

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

Submitting Stretched Funding Claims

Providers are not automatically set up to deliver the stretch funding on the FIS Portal, if you would like to deliver this please contact FIS on 01332 640758 to inform us and we can then set you up on the FIS Portal and discuss the possible stretched models with you.

Stretched Funding Attendance Dates can be found within the downloads section of the childcare provider funding page website, this will show you the maximum number of weeks you can stretch funding each term throughout the academic year. If you are delivering a stretched offer you will need to refer to the stretched offer attendance dates on the funding timetable.

Please Note: Stretched funding refers to the practice of a child attending more than 38 weeks per year and claiming for a reduced number of funded hours per week. For the universal offer this will reduce the funded hours to less than 15 hours a week or for the extended entitlement offer this will reduce the funded hours to less than 30 hours per week. Any arrangements you have with parents/carers regarding spreading the cost of invoicing evenly over the year is not always stretched funding. If a child is attending and claiming for 15 universal hours or 30 extended hours they can only be classed as a term time child regardless of your invoicing procedures.

Setting up

Providers will need to email FIS@derby.gov.uk with their closure dates for each academic year before starting to use the system to submit child details for stretched funding. This must be done accurately otherwise the system will not calculate the child's hours of attendance correctly and your funding will be inaccurate. The funded period is set on an academic year basis, so available hours are allocated pro-rata from September to the following August (autumn, spring, summer)

Please see the stretched payment models the Council offers:

- 47.5 weeks 12 universal hours 24 extended hours
- 51 weeks 11.18 universal hours 22.35 extended hours
- 52 weeks 11 universal hours 11 extended hours

Once FIS has set your closure dates for the academic year this will then set the maximum weekly hours you can claim each week for any child taking up the stretched funding, please see stretched validation below which reflects a provider who will be offering a stretched model of 47.5 weeks for the academic year:

Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers:

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

▼ Show Stretched Offer Validation Calculation

	Universal	Universal Two Days or More	Extended	Extended Two Days or More
Maximum Yearly Hours	380.00	570.00	760.00	1140.00
Days In Year (per term dates)	364			
Closure Days In Year	128			
Operational Days Per Week	5			
	=	47.20		
Maximum Weekly Hours	8.00	12.00	16.00	24.00

- **Days in Year** – is the sum of the number of days in each of the three terms within the academic year (this can be greater or less than 365)
- **Closure days** – this is the total number of closure days (days you will not be offering the stretch funding) including weekends in the three terms within the academic year
- **Operational days per week** – this would be five days if providers are open Monday to Friday inclusive

Please Note: if you are offering the 51 week stretch model 'weeks open in year' in the stretched offer validation calculation will show as 49 weeks to allow the maximum weekly hours to calculate correctly, however you will still be able to submit and receive funding for 51 weeks across the academic year.

To claim for a child with stretched funding

The way the system calculates stretched funding has changed. Once FIS has set up your closure dates in the 'Termly Funding Dates' section of the FIS portal you will then know what funding you can allocate to a child on a weekly basis.

The screen below shows an example of a child attending 5 days per week in Autumn term from the 4 September to the 29 December (including October half term but excluding Christmas bank holidays) – claim is for 16.6 weeks (16 full weeks plus 27, 28, 29 December). Please see decimal chart on page 23 to assist in calculating any part week claims for stretched funding.

Manage Providers: [Test Childminder \(Childminder\)](#)

Child Details	Funding Details	Parent / Carer Details
Funding Details		
Start Date*	04-Sep-2017	
End Date*	31-Dec-2017	
	Default Term Dates	
Weeks Attended in Term*	16.6	
Present during Census	<input checked="" type="checkbox"/>	
Attends Two Days or More	<input checked="" type="checkbox"/>	
Nominated for DAF*	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Stretching Entitlement	<input checked="" type="checkbox"/>	
Universal Funded Hours per Week		
Universal Hours*	12	
Extended Funded Hours per Week		
Extended Hours*		
30H Eligibility Code	30 Hours Free Childcare	
Eligible for 30H	<input type="checkbox"/>	
Total Funded Hours per Week		
Total Funded:	12.00	
Attendance Days		
Attends Monday	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Attends Tuesday	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Attends Wednesday	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Attends Thursday	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Attends Friday	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Attends Saturday	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Attends Sunday	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Non-Funded Hours per Week		
Non-Funded Hours*		
<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/carers</p>		

Weeks Attended in Term

If you are offering a stretched offer your funded weeks for stretch and term time children will be pre-set by FIS to reflect the stretched model you have requested, so for any term time only children you will have to adjust the 'Weeks Attended in Term' to the number of funded weeks stipulated on the term time funding timetable or adjust to reflect the actual number of weeks that will be delivered child's actual.

Universal Hours

You will enter the number of universal weekly hours for the stretch model you are delivering as stated on the stretch attendance dates table.

Extended hours

You will enter the number of extended weekly hours additional to the universal hours you have already entered which make the weekly stretched hours you are claiming for as stated on the stretch attendance dates table.

For example:

If a child is taking 1140 extended hours over 51 weeks you would enter 11.18 universal hours and 11.18 extended hours

If a child is taking 1140 universal hours over 47.5 weeks you would enter 12 universal hours and 12 extended hours

Week Decimal Converter

As the guidance states you will be required to submit your actual '**Weeks Attended in the Term**' for stretched funding children based on what they are actually attending each term. Therefore some weeks might not be full claimed weeks, for example Christmas Days / Boxing Day or other closure days. Below is a table to help you identify the decimal to claim in these circumstances.

Funded days attended in a part week / days child normally claims in a week	Decimal to claim
6/7	.85
5/7	.71
4/7	.57
3/7	.42
2/7	.28
1/7	.14
5/6	.83
4/6	.66
3/6	.5
2/6	.33
1/6	.16
4/5	.8
3/5	.6
2/5	.4
1/5	.2
3/4	.75
2/4	.50
1/4	.25
2/3	.66
1/3	.33
1/2	.5

Example 1: Child normally attends 5 days per week but provider closes for two days on last week of holidays in a 17 week period. Claim to submit would be 16.6 (3/5)

Example 2: Child normally attends 3 days per week but provider closes on last day of holidays in a 14 week period. If that was normally a funded attendance day for the child the claim would be 13.66 (2/3)

Adjustment Claims

Adjustments can only be completed for any new child that starts at your provision after headcount week. You must complete and submit the adjustment form which can be found in the 'FORMS' tab of the FIS Portal, all adjustment form must be submitted by the adjustment deadline for the term as stipulated on the FEEE funding timetable.

1. To view your adjustments go to FUNDING > Adjustments > Select funding year/term

Synergy FIS Provider Portal

Signed in as: **childminder**
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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers: Test Childminder (Childminder)

Provider Headcount Records

Previous | Page: 1 | Next [6 Results]

Adjustments	Year	Term	Funding Type
Select	Academic Year 2017/18	Summer	2 Year Old Funding
Select	Academic Year 2017/18	Summer	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Spring	2 Year Old Funding
Select	Academic Year 2017/18	Spring	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Autumn	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Autumn	2 Year Old Funding

Previous | Page: 1 | Next [6 Results]

2. The details of the adjustment will be displayed with a reason.

Synergy FIS Provider Portal

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HOME FORMS COURSES **FUNDING** STAFF

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

Please select a provider from the drop down below

Manage Providers: Test Childminder (Childminder)

View Adjustments: Academic Year 2017/18 Autumn - 3 & 4 Year Old Funding [CHANGE](#)

Not Paid - Total: £425.25

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	07-Sep-2017	Piper Peter	20-Apr-2013	105.00		£0.00	£425.25	£425.25	child started after headcount 7 weeks x 15 hours

Please Note: New children starting after headcount will be added into your 'Actuals' with zero against them so the child's details will be carried forward into the next term. The system will show the adjustments as 'Not Paid' even when it has been paid! This is because we do not currently use the system to make payments so please ignore this.

2 Year Old Voucher Codes

Please remember that you have a separate Headcount submission for 2 year olds funding. An eligibility letter must be seen and retained by the provider before entering a 2 year old child onto the FIS portal.

The Council is implementing a new system for parents to check eligibility codes of children online. This new facility reduces data entry and fraud. In future, all eligible 2 year olds will be issued with a unique EY voucher code when eligibility has been determined by the Council.

Eligibility Letters without a Voucher Code

Some parents/carers will have received an eligibility letter for their child with no 2yr old voucher code on. Letters without a code can be entered as usual outlined in the guidance using the 'Add Child'. Please make sure you have checked the letter of eligibility and are submitting children under the correct 2 year old funding headcount options within the FIS portal.

Eligibility Letters with a Voucher Code

Some parents may have received an eligibility letter with a voucher code on. When submitting claims for children whose parents have been given a 2 year old eligibility code, please follow the process outline below:

1. Go to '**Funding**' > **Actuals** > Select the 2 year old headcount term you require
2. Select '**Enter EY Voucher Code**'
3. Enter the 2yr voucher code, child's date of birth, and surname and click submit

The screenshot displays the 'Synergy FIS Provider Portal' interface. A modal window titled 'EY Claim' is open, prompting the user to 'Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.' The form contains three input fields: 'Voucher Code*', 'Child Date of Birth*', and 'Child Surname*'. A note below the fields states '*denotes mandatory fields'. At the bottom of the modal are 'Submit' and 'Cancel' buttons. In the background, the portal's navigation menu includes 'HOME', 'FORMS', 'Summary', and 'Termly F'. A dropdown menu for 'Providers' is visible, showing 'Test Childminder (Childminder)' as the selected option. The top right corner indicates the user is signed in as 'childminder' with links for 'User Settings' and 'Sign Out'.

The code is unique and will only work with the child's surname and date of birth. Take care to enter the correct details. If the wrong details are added twice, or more, the system will lock this facility for a short period of time.

After submitting the details, the system defaults to the second tab and the term dates are already shown. Providers must go to the first tab to check the names match the Birth Certificate (or other official documentation) and that the address matches the 'Parental Contract'. The Ethnicity will also need completing.

Go back to the Funding Details tab and complete as normal, please note the term dates may need amending.

When you have completed all the details select Save. Please note the status of the child will show as **Edit Pending** not **Add Pending** as you would usually expect with a new child.

2yr Old Children Given Eligibility by another Local Authority

Some providers may have 2 year old children that are given eligibility by another Local Authority. These children will not be on Derby's FIS system as their eligibility has been checked elsewhere therefore they will appear to FIS as ineligible for funding. When submitting a claim for a 2 year old given eligibility by another Local Authority you **must** make sure all information matches the eligibility letter, as FIS will initially make contact with the Local Authority to confirm the child's eligibility. If the Local Authority Families Information Service

confirms they have not sent an eligibility letter we will contact you so you can liaise with the other Local Authority to obtain a letter.

Please be note that if an eligibility letter has not been obtained prior to the headcount deadline we will not process the claim on the headcount, it will need to be added as an adjustment and will only be funded from the number of available weeks after headcount.

Viewing Payments and Previous Claims


1. Select 'FUNDING' tab, then 'SUMMARY'
2. Select the year, term and funding type you wish to view

Synergy FIS Provider Portal

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

[HOME](#) [FORMS](#) [COURSES](#) **FUNDING** [STAFF](#)

[Summary](#) [Termly Funding Dates](#) [Estimates](#) [Actuals](#) [Adjustments](#) [Eligibility Checker](#)

Please select a provider from the drop down below 

Manage Providers:

Provider Headcount Records

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Summary	Year	Term	Funding Type
Select	Academic Year 2017/18	Summer	2 Year Old Funding
Select	Academic Year 2017/18	Summer	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Spring	2 Year Old Funding
Select	Academic Year 2017/18	Spring	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Autumn	3 & 4 Year Old Funding
Select	Academic Year 2017/18	Autumn	2 Year Old Funding

Previous | Page: 1 | Next [6 Results]

3. The page below will give a breakdown of the funding you have been for the term.

Synergy FIS Provider Portal

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

[HOME](#) [FORMS](#) [COURSES](#) **FUNDING** [STAFF](#)

[Summary](#) [Termly Funding Dates](#) [Estimates](#) [Actuals](#) [Adjustments](#) [Eligibility Checker](#)

Please select a provider from the drop down below 

Manage Providers:

Summary: Academic Year 2017/18 Autumn - 3 & 4 Year Old Funding [CHANGE](#)

Estimates		Actuals	
Term Length (Weeks)	14.00	Term Length (Weeks)	17.00
Provider Rate applied	£4.05	Provider Rate applied to child funding	£4.05
Base Rate	£4.05	Base Rate	£4.05
Estimate Funding		Universal Funding	
Hours Per Week	0.00	Funded Hours for Term	414.00
Term Funding Amount	£0.00	Funding Amount @ Provider Rate	£1676.70
Interim %	60.00%	Universal Funding Amount	£0
Interim Amount Payable	£0.00	Extended Funding	
Total Interim Amount Paid to Date (before Adj)	£0.00	Funded Hours for Term	0.00
Interim Amount Payable Balance	£0.00	Funding Amount @ Provider Rate	£0.00
Extended Funding Amount		£0	
Processed		Totals	
Processed Date		Funded Hours for Term	414.00
		Funding Amount @ Provider Rate	£1676.70
		Child Weightings	£0
		Term Funding Amount	£0.00
		Interim Amount Paid (before Adj)	£0.00
		Term Funding Amount Balance	£1676.70
		Adjustments Paid with Final Payment	£0.00
		Actual Amount Paid (Inc. Adj)	£0.00

Please Note: Always check your 'SUMMARY' page for each age group a few weeks after the headcount deadline to ensure the figures are correct and balance back to what you have entered for the term.

Staff details

Childcare providers are able and responsible for adding and updating their own staff details on the FIS Portal. Staff that are not listed against your setting will not be able to book onto training courses via the FIS Portal so please check and update your staff list regularly. All staff information is managed by the Learning and Inclusion team who can be contacted by emailing earlyyearstraining@derby.gov.uk. Click on the **'STAFF'** tab to see all the current staff that you have listed against your setting (in the example we have removed staff names for confidentiality).

Synergy FIS Provider Portal

Logged in as: [Redacted] [User Settings](#) | [Logout](#)

HOME FORMS COURSES FUNDING **STAFF**

Staff List

Location: [HOME](#) > STAFF

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date

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

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>
Edit	Unchanged	[Redacted]	Main Contact	[Redacted]	<input checked="" type="checkbox"/>
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>
Edit	Unchanged	[Redacted]	Staff	[Redacted]	<input type="checkbox"/>

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

[Add Staff](#) [Submit](#)

© 2015 Tribal Education Ltd Synergy FIS Provider Portal - Part of the Synergy FIS Suite **TRIBAL**

From this opening screen you can edit the details of your current staff or you can add new staff.

Adding new staff - If you need to add a new member of staff click on the **'Add Staff'** box at the bottom left of the page the screen below will then appear. You must tick the involved with provider box unless you are adding the main contact (leader or manager) of the setting then you should tick the main contact box.

Once you have filled out all the fields and ticked the appropriate box please complete the other tabs - **'Address/Other Details'** and **'Qualifications'**.

'Address/Other Details' tab - Please use the staff member's **home** address and either their home or workplace email address, we **must** have at least **two** different phone numbers for each member of staff one of which can be the workplace number. Please ignore the 'NI Number' as FIS do not need this information. Please tick the Contact Preferences.

'Qualification' tab - When you click on the qualification field a drop down box will appear, please select from the list which childcare qualification the staff member has. Once you have selected the qualification please add the start date and the end date when the qualification was achieved. If the member of staff is still completing the qualification tick the in progress box.

Once you have completed all the information click **'Save'**. Please repeat this process for all new staff at your setting. Please note your staff records will **not** be accepted if all appropriate fields have not been filled in.

Staff Main Details
Address/Other Details
Qualifications
Questions

Staff Details

Staff Type*

Title*

Forename*

Initials*

Surname*

DOB

Gender* ☐ Male ☐ Female

Main Registration Contact ☐

Start Date*

End Date

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved with Provider	Main Contact	Census Contact	Posts
<div style="border: 2px solid black; width: 100%; height: 100%;"></div>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

[Save](#)
[Cancel](#)

*denotes mandatory fields

Editing listed staff - If you need to edit a current member of staff click on the '**Edit**' link next to the person's name in the list. When you edit a staff member's details, the fields will be the same as when you add a new member of staff, please check to make sure that there have been no changes and then click '**Save**'.

Removing listed staff - Click on '**Edit**' from your staff list and enter the date which they left your setting in the '**End Date**' field. Once you have done this click on '**Save**' at the bottom of the page, now you have requested this practitioner to be removed from your setting on the FIS portal.

Training courses

Childcare providers can book staff that are listed on their '**STAFF**' tab onto training courses. Select the '**COURSES**' tab. All courses are organised and managed by the Learning and Inclusion team who can be contacted by emailing earlyyearstraining@derby.gov.uk

Booking staff/yourself onto a course - Once on the '**COURSES**' screen click on 'Find a course', .



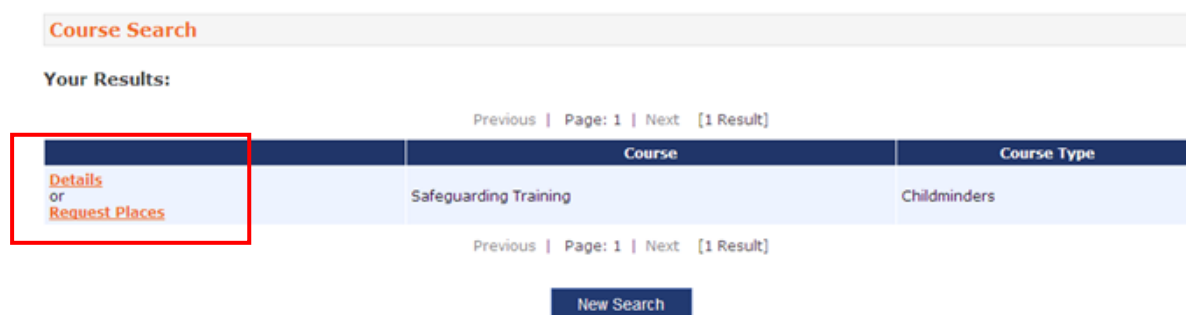
Course Search

Please select a search route:

Searching is made easier by selecting a particular criteria.

- [Find a course](#)

You will now see a screen which prompts you to enter the search terms. Once you have filled out the necessary fields and clicked on '**Finish**' you will be taken to a screen of results.



Looked in '**Course Details**' and checked through the list to make sure you are booking onto the correct course and then select '**Request Places**'.

You will now see the list of staff members currently at your setting, clicking on the box next to '**Request Booking**' for the staff member(s) you want to attend a course, then clicking '**Submit**'.

Submitting a request does not mean you have a place, requested places will be checked by the Learning and Inclusion Team and approved, you will then receive an email telling you if you have a place or not.

Reviewing places already booked on courses - When you select the '**COURSES**' tab you are able to click onto the '**View Bookings**' area. On this screen you will be able to filter courses by date and check who is booked onto courses between the dates selected. You will also be able to cancel bookings.

Frequently Asked Questions

Q. How are places allocated?

A. On a first come first served basis, based on a reasonable number of places being requested per setting. However the Council reserves the right to prioritise places on courses.

Q. How can I request a place if a member of staff is not on the staff list?

A. You cannot request a place for a member of staff if they are not on the list. You need add them in '**STAFF**' before you can book any training for them.

Q. Can I cancel places online?

A. Yes, if you read through how to review bookings in this guide you will find out how to cancel a place.

Q. Can I cancel a place at any time?

A. Yes, however if you cancel a place within 1 week you may be charged for the place.

To ensure you get the places you want on courses we recommend that you regularly check your staff list online and update it promptly as staff change.

Thank you for taking the time to find out more about the FIS Portal, we hope that this guide will support you as you submit your information.

If you have any problems please contact:

Families Information Service

2nd Floor

Derby City Council

The Council House

Corporation Street

Derby

DE1 2FS

Telephone: 01332 640758

Email: fis@derby.gov.uk

All courses and staff information is managed by the Learning and Inclusion team who can be contacted by emailing earlyyearstraining@derby.gov.uk