

Learn more...

**Synergy Free Entitlement Data
Collection Training**

Hackney Education



 **Hackney**

Synergy Overview

Topics

A) Logging in to the portal

B) 02 Year Old Funding

- Submitting Estimates
- Actual 2 Year Old Headcount Submission
- Submitting Adjustments

B) 3 and 4 Year Old Funding

- Submitting Estimates
- Actual 3 and 4 Year Old Headcount Submission
- Submitting Adjustments
- Ad Hoc 30 Hours Eligibility Checks

C) Help and Advice

1. Logging into the Portal

Signing into the system

Getting Started with Synergy

- Click the link below to login to the Synergy Portal
<https://portal.hackney.gov.uk/synergy/providers/>
- From the Synergy Sign In screen in the Enter your username field type your username. From the next prompt enter your password

Your default password and memorable words will be sent to you separately. You will be prompted to change these after the initial login

make a note of your new details and keep secure

If you currently have a Hackney provider portal account, your username will remain the same. If you are new to using provider portals, please contact: freechildcare@hackneygov.uk and request a new account.

The screenshot shows a web browser window with the URL <https://testportal.learningtrust.co.uk/Train/S>. The page title is "Sign In - Synergy". The main content area has a "Sign In" heading and a sub-heading "Sign in or create an account with us.". Below this is a form with the label "Enter your username". The text "Hester" is entered in the username field. Below the field are two buttons: "Next" (blue) and "Create Account" (grey). A red speech bubble with a blue border points to the "Next" button, containing the text "Type your User name then click Next". The Hackney logo is visible at the bottom of the page.

Getting Started with Synergy

- You will be prompted to change your password to a new password. Follow the prompt to create a new password, then **Sign In**.

Sign in

Enter your password

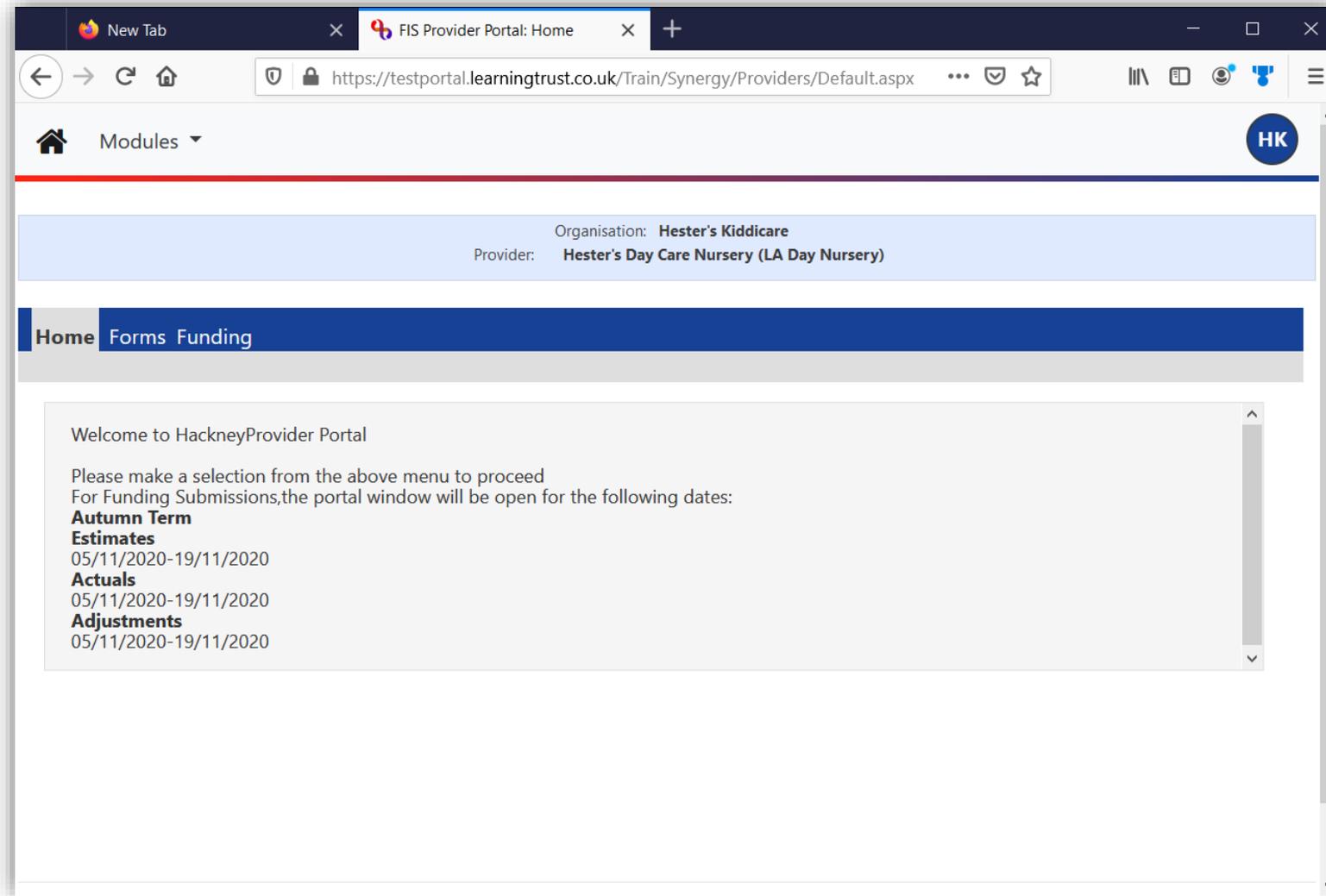
.....|

Change User Forgot Password Sign In

Enter your Password. You will be prompted to change to a new one

Getting started continued

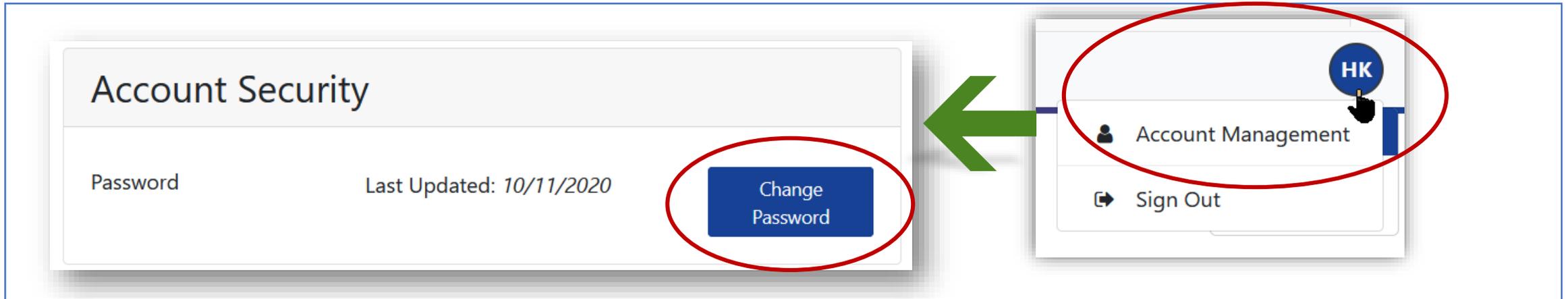
- The following splash screen appears:



Getting Started with Synergy

Change your memorable word by:

- Clicking on your account name (initials) at the top-right of the screen.
- Select **Account Management**
- Click on the **Authentication Questions** tab
- In the Old Answer field, enter your current memorable word as provided to you
- In the New Answer field, enter a new memorable word of your choosing. In the **Confirm New Answer** field, re-enter your new memorable word.



Getting Started with Synergy

Forgotten your Password

- If you have forgotten your password, click on **Forgot Password** and you will be presented with the following screen
- Enter your username and click **Request Token** to reset your password. This will send you an email with instructions on how to reset your password.

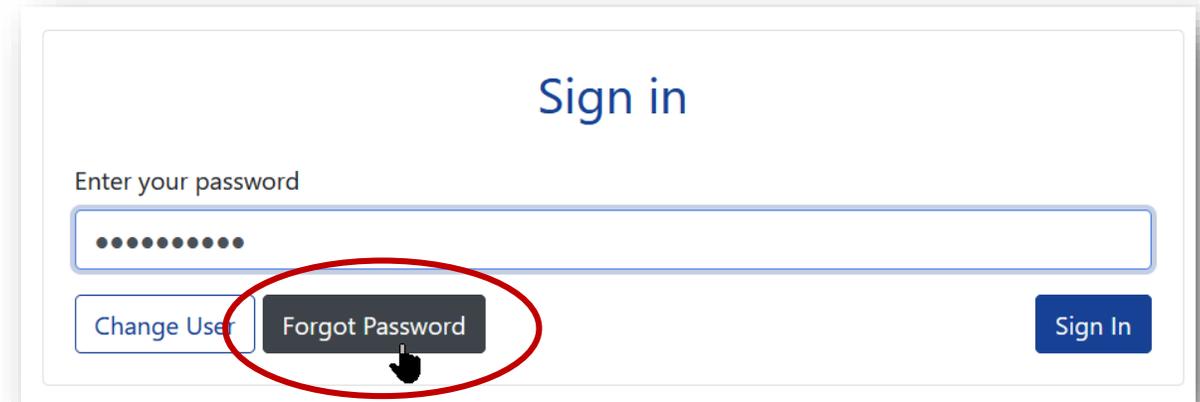
Using Help

To read more information about requesting a new password

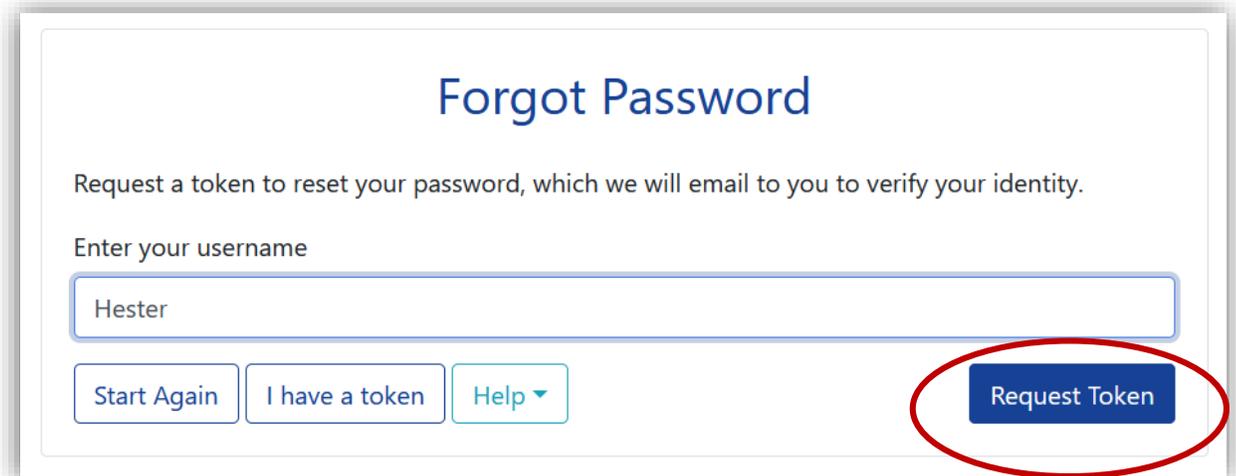
Or if you do not receive an email with instructions to reset your password.

- If you happen to subsequently remember or find your password, click **Start Again** to re-enter your username and password.

After logging in successfully, you'll be presented with the following Synergy Home screen.



The screenshot shows the 'Sign in' page. At the top, it says 'Sign in'. Below that is a text input field labeled 'Enter your password' containing several dots. At the bottom, there are three buttons: 'Change User', 'Forgot Password', and 'Sign In'. The 'Forgot Password' button is circled in red, and a mouse cursor is pointing at it.



The screenshot shows the 'Forgot Password' page. At the top, it says 'Forgot Password'. Below that is a text input field labeled 'Enter your username' containing the text 'Hester'. At the bottom, there are four buttons: 'Start Again', 'I have a token', 'Help', and 'Request Token'. The 'Request Token' button is circled in red.



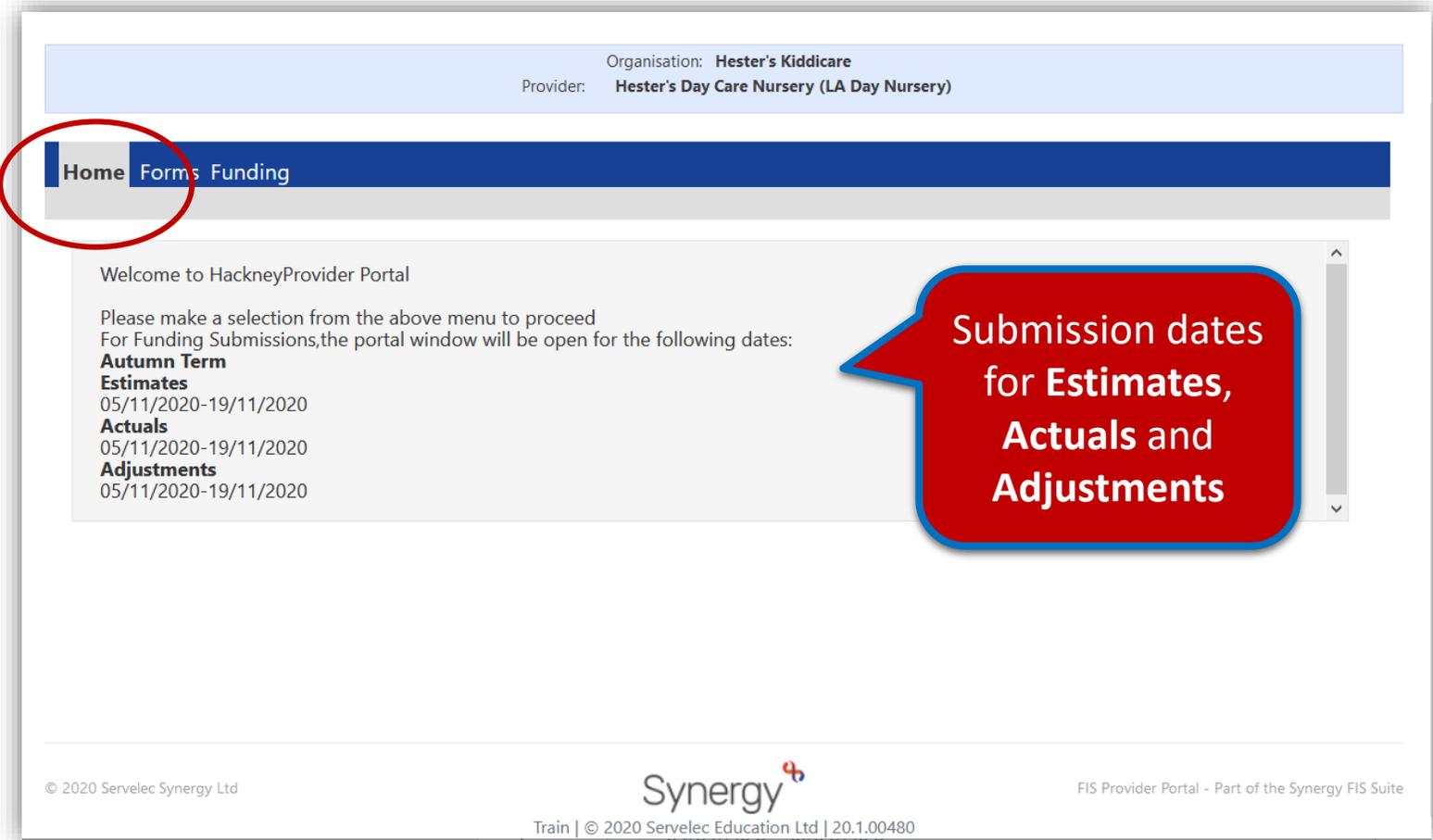
2. Getting Started with Submissions

Posting submissions

Getting Started with Synergy

2 Year Old Funding

After logging in to the portal, you will be presented with the **Home** tab. This will show you the dates within which you can submit your **Estimates, Actuals** and **Adjustments** for the relevant term:



Getting Started with Synergy

2 Year Old Funding

- Click on **Funding** and select the appropriate **term** i.e. Autumn Term, then click on **2 Year Old Funding**

The screenshot shows the Synergy Funding software interface. A red circle with the number '1' highlights the 'Funding' menu item in the top navigation bar. Below the navigation bar, the user's organization and provider information are displayed: Organisation: Hester's Kiddicare, Provider: Hester's Day Care Nursery (LA Day Nursery). The 'Funding' menu is expanded, showing options for '20/21', 'Spring Term', and 'Autumn Term'. A red circle with the number '2' highlights the 'Autumn Term' option. A red arrow points from the 'Autumn Term' option to a second screenshot of the software interface. This second screenshot shows the 'Summary Head Count Records for 20/21 - Autumn Term' page. A red circle highlights the 'Funding Type' column in the table, which contains the option '2 Year Old Funding'.

1

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Select Year and Term

20/21

Spring Term

Autumn Term

2

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary Head Count Records for 20/21 - Autumn Term

20/21

Spring Term

Autumn Term

Funding Type	
	2 Year Old Funding
	3 & 4 Year Old

Getting Started with Synergy

2 Year Old Funding continued

The **Summary** tab shows information on how payments are calculated.

- The left side of the screen focusses on **Estimates**, with the right side focussing on **Actuals**.

Initial payments/balances will be **zero**.

Instructions will be featured later on how to view changes/updates.

Home Forms Funding

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary: 20/21 Autumn Term - 2 Year Old Funding 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)	13.00	Term Length (Weeks) Term Time	13.00
▶ Provider Rate applied	£6.48	▶ Provider Rate applied to child funding	£6.48
Estimate Funding		Universal Funding	
Hours Per Week	0.00	Funded Hours for Term	0.00
Term Funding Amount	£0.00	Funding Amount @ Provider Rate	£0.00
Interim %	50.00%		
Interim Amount Payable	£0.00		
<hr/>		<hr/>	
Total Interim Amount Paid to Date (before Adj)	£0.00	Universal Funding Amount	£0.00
<hr/>		<hr/>	
Interim Amount Payable Balance	£0.00	Totals	
<hr/>		Funded Hours for Term	0.00
		Funding Amount @ Provider Rate	£0.00
		Child Weightings	£0.00
		<hr/>	
		Term Funding Amount	£0.00
		Interim Amount Paid (before Adj)	£0.00
		<hr/>	
Number of Payments Due	3 / 3	Term Funding Amount Balance	£0.00
Next Payment Amount Due (before Adj)	£0.00	Adjustments Paid with Final Payment	£0.00
<hr/>		<hr/>	
Fully Processed	No	Actual Amount Paid (Inc. Adj)	£0.00

Getting Started with Synergy

2 Year Old Funding continued

- Click on the **Estimates** tab
- From the field **Number of Weeks for this Term** enter a value i.e. **13.00**
- Enter the estimated **Number of Funded Hours** you are claiming for the term;
e.g. number of children x number of hours per week = total hours per week for the term
- When complete click the **Calculate** button.

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker Registered Interests

Select Year and Term

Example:

13 Children ~~X~~ 15 Hours each week = 195 Hours Per Week

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker Registered Interests

Submit Estimate: 20/21 Autumn Term - 2 Year Old Funding 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'

Calculate Send Claim

Getting Started with Synergy

2 Year Old Funding continued

- The screen updates with the calculated updated information, in this example there are 2,535.00 Hours in this term.

To change any figures simply retype in the relevant fields then click the **Calculate** button.

To submit the claim click the **Send Claim** button.

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker Registered Interests

Submit Estimate: 20/21 Autumn Term - 2 Year Old Funding CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term There are 2,535.00 Hours in this Term

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

Calculate **Send Claim**

Calculated hours displays once the Calculate button is clicked

If you need to edit your figures overtype the numbers then click **Calculate**. Otherwise click **Send Claim**.

Getting Started with Synergy

2 Year Old Funding continued

- Clicking the **Send Claim** button - will send the local authority your **Estimates** and provide you with a summary of how the payments will be calculated.

A *Submission Successful* message appears once successful.

The screenshot shows the Synergy Funding interface. At the top, it displays 'Organisation: Hester's Kiddicare' and 'Provider: Hester's Day Care Nursery (LA Day Nursery)'. Below this is a navigation bar with 'Home Forms Funding' and a sub-menu with 'Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests'. A green banner with a checkmark and the text 'Submission Successful' is highlighted with a red circle and a green arrow pointing to it. Below the banner is a section titled 'Submit Estimate: 20/21 Autumn Term - 2 Year Old Funding CHANGE'. It contains two input fields: 'Number of Weeks for this Term' with the value '13.00' and 'Estimate Number of Funded Hours Per Week for this Term' with the value '195'. To the right of the second field, it says 'There are 2,535.00 Hours in this Term'. Below the input fields are two buttons: 'Calculate' and 'Send Claim', both of which are circled in red. A red speech bubble with white text says 'The message Submission Successful appears'.

Note: Once the local authority imports your **Estimates**, the **Send Claim** button will be disabled.

Getting Started with Synergy

2 Year Old Funding continued

The Summary Tab

- Click the **Summary** tab – notice your submissions have now been changed based on your submission entered

Home Forms **Funding** Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary: 20/21 Autumn Term - 2 Year Old Funding 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)	13.00	Term Length (Weeks) Term Time	13.00
▶ Provider Rate applied	£6.48	▶ Provider Rate applied to child funding	£6.48
Estimate Funding		Universal Funding	
Hours Per Week	195.00	Funded Hours for Term	0.00
Term Funding Amount	£16426.80	Funding Amount @ Provider Rate	£0.00
Interim %	50.00%	Universal Funding Amount	£0.00
Interim Amount Payable	£8213.40	Funded Hours for Term	0.00
▶ Total Interim Amount Paid to Date (before Adj)		Funding Amount @ Provider Rate	£0.00
	£2737.80	Child Weightings	£0.00
Interim Amount Payable Balance	£5475.60	Term Funding Amount	£0.00
		Interim Amount Paid (before Adj)	£2737.80
Number of Payments Due	2 / 3	Term Funding Amount Balance	(£2737.80)
Next Payment Amount Due (before Adj)	£2737.80	Adjustments Paid with Final Payment	£0.00
Fully Processed	No	Actual Amount Paid (Inc. Adj)	£0.00
Processed	No	Processed Date	

Getting Started with Synergy

2 Year Old Funding continued

- The Summary Tab Estimates – Example of estimates based on your submission.

Term Length (Weeks)

Hour Per Week

Interim Amount Payable balance

Estimates	
Term Length (Weeks)	13.00
▶ Provider Rate applied	£6.48
Estimate Funding	
Hours Per Week	195.00
Term Funding Amount	£16426.80
Interim %	50.00%
Interim Amount Payable	£8213.40
<hr/>	
▶ Total Interim Amount Paid to Date (before Adj)	£2737.80
<hr/>	
Interim Amount Payable Balance	£5475.60
<hr/>	
Number of Payments Due	2 / 3
Next Payment Amount Due (before Adj)	£2737.80

Example of figure entered from the Funding then Estimates tab. See page 13

Figures altered once submitted to the LA

Getting Started with Synergy

2 Year Old Funding continued

Parents/Carers will apply for 2 Year Old Funding themselves via the parent portal, then contact you with a voucher code confirming their eligibility.

. In this example the Autumn Term was selected.

Follow the steps below to add children to your headcount:

- From the **Funding** tab click on **Actual**
- Select the **Autumn Term**
If required, select the appropriate Term and Funding type (as seen on page 11)
- Click **2 Year Old Funding**

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Select Year and Term

20/21

- Spring Term
Submission Period: 07-Aug-2020 to 03-Feb-2021
- Autumn Term**
Submission Period: 16-Sep-2020 to 30-Nov-2020

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Actuals Head Count Records for 20/21 - Autumn Term

20/21

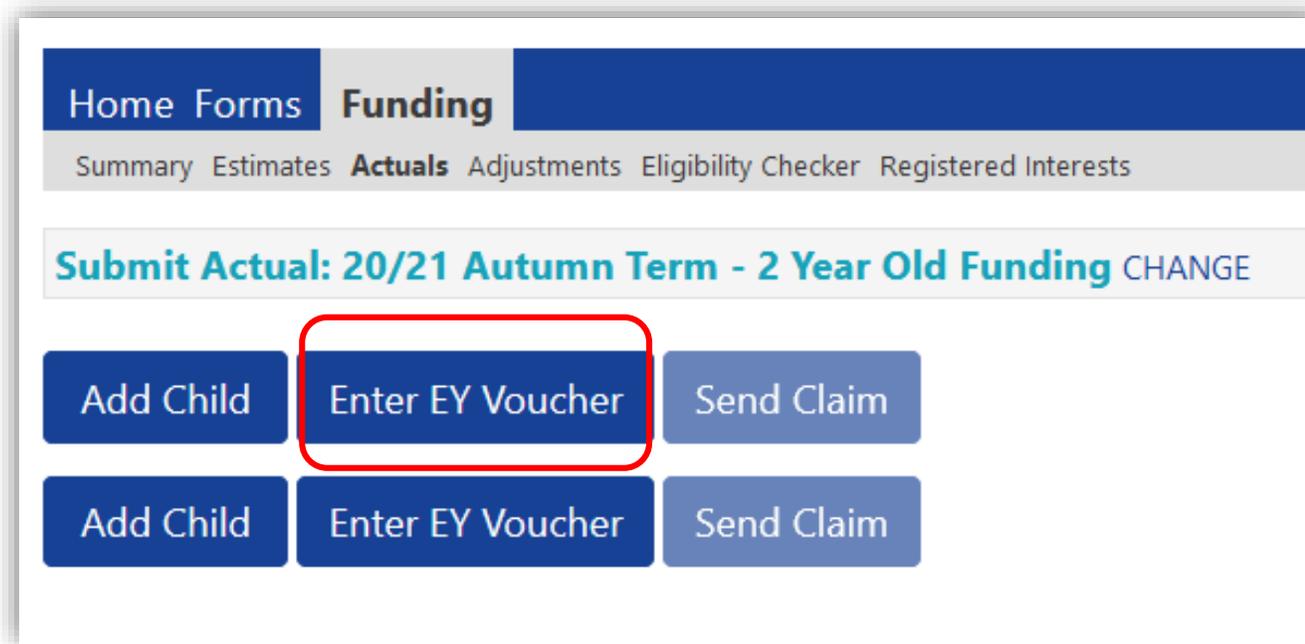
- Spring Term
Submission Period: 07-Aug-2020 to 03-Feb-2021
- Autumn Term**
Submission Period: 16-Sep-2020 to 30-Nov-2020

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

Getting Started with Synergy

2 Year Old Funding continued

- Click Enter EY Voucher button



The screenshot displays the Synergy Funding interface. At the top, there is a navigation bar with 'Home Forms' and 'Funding' tabs. Below this, a secondary navigation bar contains links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. The main content area features a header for 'Submit Actual: 20/21 Autumn Term - 2 Year Old Funding' with a 'CHANGE' link. Below the header, there are two rows of buttons. The first row contains 'Add Child', 'Enter EY Voucher', and 'Send Claim' buttons. The 'Enter EY Voucher' button in the first row is highlighted with a red circle. The second row also contains 'Add Child', 'Enter EY Voucher', and 'Send Claim' buttons.

Getting Started with Synergy

2 Year Old Funding continued

- Complete the **Synergy Voucher Code** (from the Synergy Parent Portal) information then click **Submit**.

NOTE: If you enter too many invalid claims number attempts the warning sign message appears.

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

Complete all fields

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Too many invalid EY Claim attempts. There will be a delay before being able to Enter EY Vouchers again.

Submit Actual: 20/21 Autumn Term - 2 Year Old Funding CHANGE

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Unsubmitted Claim	Elba, Edna (30-Aug-2018)	100.00	£648.00	

Getting Started with Synergy

2 Year Old Funding continued

From the Summary tab click the Child Details tab

The screenshot displays the Synergy Funding system interface. At the top, it shows the Organisation as 'Hester's Kiddicare' and the Provider as 'Hester's Day Care Nursery (LA Day Nursery)'. The main navigation bar includes 'Home', 'Forms', and 'Funding'. Below this, there are tabs for 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. The 'Child Details' tab is highlighted with a red circle. The child's name is 'Edna Elba' and the Date of Birth (DOB) is '30-Aug-2018'. The 'Summary' tab is also highlighted with a red circle. The main content area shows a table of funding details. On the left, there are fields for 'Term Start Date' (01-Sep-2020), 'Term End Date' (31-Dec-2020), 'No of weeks attended' (10.00), and 'Provider Total Rate' (£6.48). On the right, there is a summary table for 'Universal Funding' and 'Totals'. The 'Universal Funding' table shows 'Funded Hours Per Week' (10.00) and 'Funded Hours for Term' (100.00). The 'Totals' table shows 'Funded Hours Per Week' (10.00), 'Funded Hours for Term' (100.00), 'Total Funding (excl. Adj)' (£648.00), 'Total amount from Adjustments' (£0.00), and 'Total amount from Pending Adjustments' (£0.00). The 'Total Funding For Term (inc Adj)' is £648.00. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that an asterisk denotes mandatory fields.

Universal Funding	
Funded Hours Per Week	10.00
Funded Hours for Term	100.00
<hr/>	
Funding Amount @ Provider Rate	£648.00
Child Weightings	£0.00
<hr/>	
Universal Funding Amount	£648.00
Totals	
Funded Hours Per Week	10.00
Funded Hours for Term	100.00
Total Funding (excl. Adj)	£648.00
Total amount from Adjustments	£0.00
Total amount from Pending Adjustments	£0.00
<hr/>	
Total Funding For Term (inc Adj)	£648.00

Getting Started with Synergy

2 Year Old Funding continued

The CHILDS DETAILS tab

The fields shown below must be completed:

Home Forms Funding

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Name: Edna Elba DOB: 30-Aug-2018

Summary Child Details Parent / Carer Details Funding Details Notes

Child Details

Forename*	Edna	Address Line 1*	1 Priestley Close
Middle Name		Address Line 2	
Surname*	Elba	Address Line 3	Hackney
DOB*	30-Aug-2018	Locality	London
Proof of DOB	<input checked="" type="checkbox"/>	Town	
Gender*	<input type="checkbox"/> Male <input checked="" type="checkbox"/> Female	County	
Preferred Surname		Postcode*	N16 6SJ
Ethnicity*	Egyptian		
SEN COP Stage*	Education, Health and Care Pl		

Save Cancel *denotes mandatory fields

Although not mandatory the Proof of DOB must be seen and ticked

Key Note: Adding parent/carer details in the Parent/Carer tab is not mandatory for 2 Year Old Funding if using the Synergy EY Voucher Code.

If you are NOT using the Synergy EY Voucher Code **you must** complete the Forename, Surname and NI (*National Insurance*) number in the Parent/Carer details tab.

Getting Started with Synergy

2 Year Old Funding continued

The FUNDING details tab

- Click on the **Funding** Details tab
- Optional: amend the **Start Date** and **End Date** fields or click **Default Term Dates**
- Enter the **Weeks Attended in Term** i.e. 10
- Tick **Present during Census**
- Tick if the child **Attends Two Days or More**

NOTE: You must tick the above if you wish to claim more than 10 hours per week

- Enter the **Universal Hours** i.e. 10

Note: Currently It is not mandatory to complete the Attendance Days options

- In the **Non-Funded Hours*** field you may need to populate with a zero – it cannot be left blank
- Click **Save** to validate the data entered
- Review the **Maximum Values Allowed** box located in the lower right hand corner of your screen.

The screenshot shows the 'Funding' tab for a child named Edna Elba (DOB: 30-Aug-2018). The 'Funding Details' section includes:

- Start Date***: 01-Sep-2020
- End Date***: 31-Dec-2020
- Default Term Dates** button
- Weeks Attended in Term***: 10.00
- Present during Census**:
- Attends Two Days or More**:
- Universal Funded Hours per Week**: 10.00
- Non-Funded Hours per Week**: 0.00

The **Attendance Days** section has radio buttons for each day of the week, all currently set to 'No'.

A red callout box points to the date fields and the 'Default Term Dates' button, labeled 'Complete relevant fields'. A green arrow points to the 'Default Term Dates' button. Another green arrow points to the 'Save' button at the bottom. A red box highlights the 'Non-Funded Hours*' field. A yellow warning icon is present next to a note about entering hours for other settings.

Maximum Values Allowed:

- Number of Weeks: 13.00
- Universal Weekly Hours: 15
- Universal Termly Hours: 195
- Universal Yearly Hours: 570

*denotes mandatory fields

Getting Started with Synergy

2 Year Old Funding continued

Key Note: If there are any errors or omission, a system alert will appear at the top of the screen outlining the errors.

- Once successfully saved, you will be returned to the headcount submissions screen.



Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Save Record Failed Due To The Errors Listed Below

Name: Edna Elba DOB: 03-Nov-2018

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

Child Details		Address	
Forename*	<input type="text" value="Edna"/>	Address Line 1*	
Middle Name	<input type="text"/>	Address Line 2	
Surname*	<input type="text" value="Elba"/>	Address Line 3	
DOB*	<input type="text" value="03-Nov-2018"/> *	Locality	
Proof of DOB	<input checked="" type="checkbox"/>	Town	
Gender*	<input type="checkbox"/> Male <input checked="" type="checkbox"/> Female	County	
Preferred Surname	<input type="text"/>	Postcode*	
Ethnicity*	<input type="text" value="Black / Chinese"/>		
SEN COP Stage*	<input type="text" value="Education, Health and Care Pl"/>		

The following errors need to be fixed before the record can be saved:
DOB entered is outside the range eligible to receive funding (Child Details Tab)

*denotes mandatory fields

Save Cancel

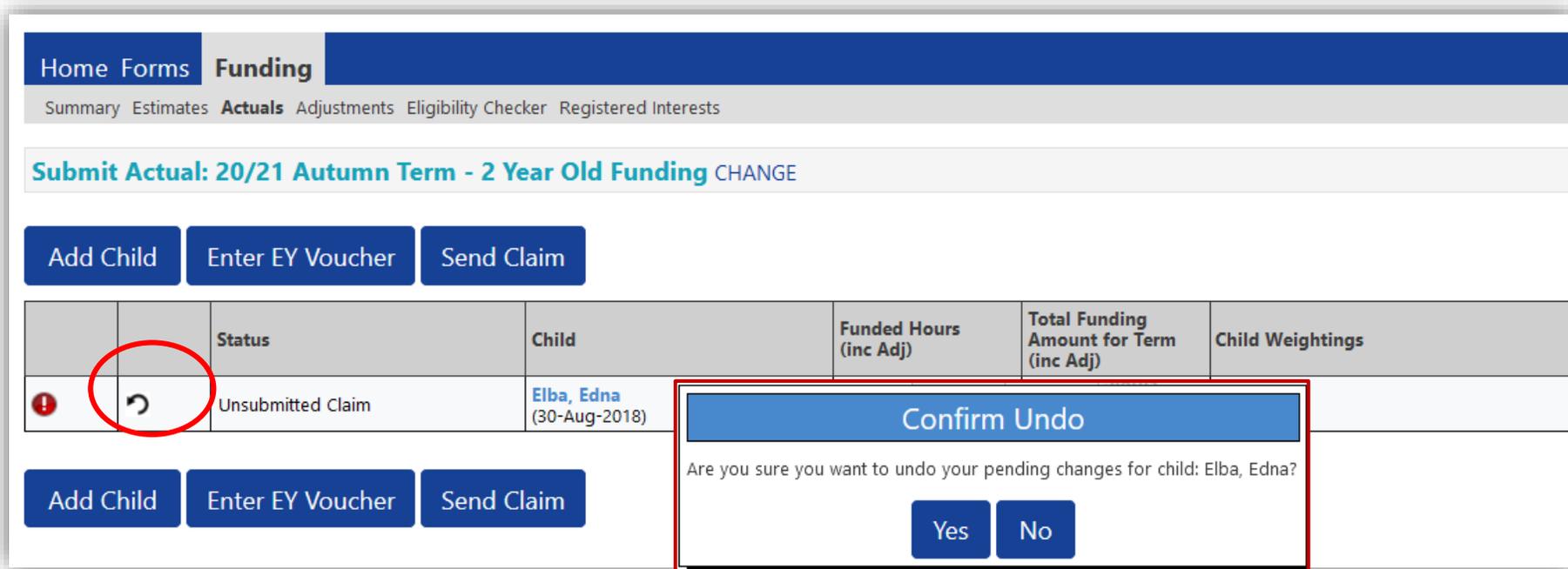
Getting Started with Synergy

2 Year Old Funding continued

IMPORTANT – Editing Child Details

If you need to remove a child from the headcount for editing purposes, you must do so before you click the **Send Claim** button.

- You can view any claims which are yet to be submitted, below is an example, click the **Edit**  button.
- At the Confirm Undo window click **Yes**. The child is now removed from the headcount.



The screenshot shows the Synergy Funding interface. At the top, there are navigation tabs: Home, Forms, and Funding (selected). Below the tabs are links for Summary, Estimates, Actuals (selected), Adjustments, Eligibility Checker, and Registered Interests. The main heading is "Submit Actual: 20/21 Autumn Term - 2 Year Old Funding" with a "CHANGE" link. Below this are three buttons: "Add Child", "Enter EY Voucher", and "Send Claim".

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Unsubmitted Claim	Elba, Edna (30-Aug-2018)			

Below the table are three buttons: "Add Child", "Enter EY Voucher", and "Send Claim". A "Confirm Undo" dialog box is overlaid on the table, asking "Are you sure you want to undo your pending changes for child: Elba, Edna?" with "Yes" and "No" buttons.

Getting Started with Synergy

2 Year Old Funding continued

- Once you have added and checked all the required children in your headcount, click the **Send Claim** button.

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Submit Actual: 20/21 Autumn Term - 2 Year Old Funding [CHANGE](#)

Add Child Enter EY Voucher **Send Claim**

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
!	↺	Unsubmitted Claim	Elba, Edna (30-Aug-2018)	100.00	£648.00	
!	↺	Unsubmitted Claim	Elba, Jason (06-Jun-2018)	100.00	£648.00	

Add Child Enter EY Voucher **Send Claim**

Getting Started with Synergy

2 Year Old Funding continued

The 'Submission Successful' banner appears

- As with your Estimates, your Actuals will need to be imported and processed by the local authority in order for you to receive payment

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding** Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

 **Submission Successful**

Submit Actual: 20/21 Autumn Term - 2 Year Old Funding CHANGE

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

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings
		Awaiting LA Download	Elba, Edna (30-Aug-2018)	100.00	£648.00	
		Awaiting LA Download	Elba, Jason (06-Jun-2018)			

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

Added submission

3. Submitting Adjustments



Amendments and children who have started after the cut off date

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments

To add children who have started after the submission cut-off date, or to make other amendments, an **Adjustment** will need to be made.

- Click the **Funding** tab
- Click the **Adjustments** tab
- Select the appropriate **Term** and **Funding Type** (if not already selected)

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Select Year and Term

20/21

Spring Term
Submission Period:
01-Jan-2021 to 03-Feb-2021

Autumn Term
Submission Period:
16-Oct-2020 to 31-Dec-2020

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Adjustments Head Count Records for 20/21 - Autumn Term

20/21

Spring Term
Submission Period:
01-Jan-2021 to 03-Feb-2021

Autumn Term
Submission Period:
16-Oct-2020 to 31-Dec-2020

	Funding Type	Ready to Process	Processed	Editable
	<input checked="" type="checkbox"/> 2 Year Old Funding	✓	✓	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 3 & 4 Year Old	✓	✓	

In this example 2 Year Old Funding has been selected

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments continued

- You have 3 options for making adjustments:
 - Click on **Enter EY Voucher** and follow the process described previously (page 19) to retrieve the child's details.
 - Or click on the name of an existing child and adjust the details accordingly
 - Or click the **Add Child** button to begin adding all of the child's details.

This is a Test Header for Adjustments

Submit Adjustments: 20/21 Autumn Term - 2 Year Old Funding

Not Paid - Total: (£6285.60)

Add Child Enter EY Voucher Send Claim

Status	Child	Total Funding Amount for Term (inc Adj)
	Martin, Dean (11-Aug-2018)	£64.80
	Watson, Mary (19-Aug-2018)	£648.00

Add Child Enter EY Voucher Send Claim

You have 3 options available. In this example click on the name of an existing child is being used

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments continued

- After selecting your required option and either adding or amending the details, click the **Pending Adjustment** tab
- From the **Number of Hours** drop-down list, select **More Hours** to add a positive adjustment or **Less Hours** to add a negative adjustment to the **Universal Hours**
- Enter the Number of Hours. Note: enter whole numbers only, you are not required to use – or +
- Provide a relevant succinct **Reason** into the free text field to support the adjustment
- When ready click the **Save** button at the bottom of the screen

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Name: Dean Martin DOB: 11-Aug-2018

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

? Please ensure, if adding hours that you submit the total number of hours you are overclaimed, ensure you reduce the claim by the total hours you are reducing

Universal Pending Adjustment

Number of Hours More Hours 7

Reason (500 characters)

Correct hours submitted from initial submission

Maximum Values Allowed:

Universal Termly Hours: 130
Universal Yearly Hours: 380

Save Cancel *denotes mandatory fields

Click the drop down field and enter the Number of Hours i.e. 7

Type a reason

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments continued

The system will validate your entries and pending any errors, return you to the main Adjustment page, where you can view your amendment

- Once all adjustments have been added, click **Send Claim**

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

This is a Test Header for Adjustments

Submit Adjustments: 20/21 Autumn Term - 2 Year Old Funding CHANGE ⓘ

▶ **Not Paid** - Total: (£6285.60)

Add Child Enter EY Voucher Send Claim

		Status	Child	Pending Universal Adj Hours	Funding Hours (inc Adj)	Amount for term (inc Adj)
ⓘ	↺	Unsubmitted Claim	Martin, Dean (11-Aug-2018)	7.00	17.00	£110.16
			Watson, Mary (19-Aug-2018)	0.00	100.00	£648.00

Add Child Enter EY Voucher **Send Claim**

Notice the adjustment update

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments continued

The Submission Successful banner appears:

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker Registered Interests

Submission Successful

This is a Test Header for Adjustments

Submit Adjustments: 20/21 Autumn Term - 2 Year Old Funding CHANGE

▶ **Not Paid** - Total: (£6285.60)

Add Child Enter EY Voucher Send Claim

		Status	Child	Pending Universal Adj Hours	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)
!	↺	Awaiting LA Download	Martin, Dean (11-Aug-2018)	7.00	17.00	£110.16
			Watson, Mary (19-Aug-2018)	0.00	100.00	£648.00

Add Child Enter EY Voucher Send Claim

Getting Started with Synergy

2 Year Old Funding – Submitting Adjustments continued

As with the submission of your **Estimates** and **Actual** Headcounts, once the LA has imported your Adjustments, you can view the change by:

- Clicking the **Summary** and select the required **Term** and **Funding Type**. The Adjustments are now visible:

The Summary tab displays adjustments from the LA

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary: 20/21 Autumn Term - 2 Year Old Funding 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)	12.00	Term Length (Weeks) Term Time	12.00
Provider Rate applied	£6.48	Provider Rate applied to child funding	£6.48
Estimate Funding		Universal Funding	
Hours Per Week	180.00	Funded Hours for Term	100.00
Term Funding Amount	£13996.80	Funding Amount @ Provider Rate	£648.00
Interim %	50.00%		
Interim Amount Payable	£6998.40		
<hr/>		Universal Funding Amount	£648.00
Total Interim Amount Paid to Date (before Adj)	£6998.40	Totals	
		Funded Hours for Term	100.00
		Funding Amount @ Provider Rate	£648.00
		Child Weightings	£0.00
Interim Amount Payable Balance	£0.00	Term Funding Amount	£648.00
		Interim Amount Paid (before Adj)	£6998.40
		Term Funding Amount Balance	(£6350.40)
		Adjustments Paid with Final Payment	£0.00
Processed	Yes	Actual Amount Paid (Inc. Adj)	(£6350.40)
Processed Date	27-Nov-2020		



3 and 4 Year Old Funding

Posting submissions

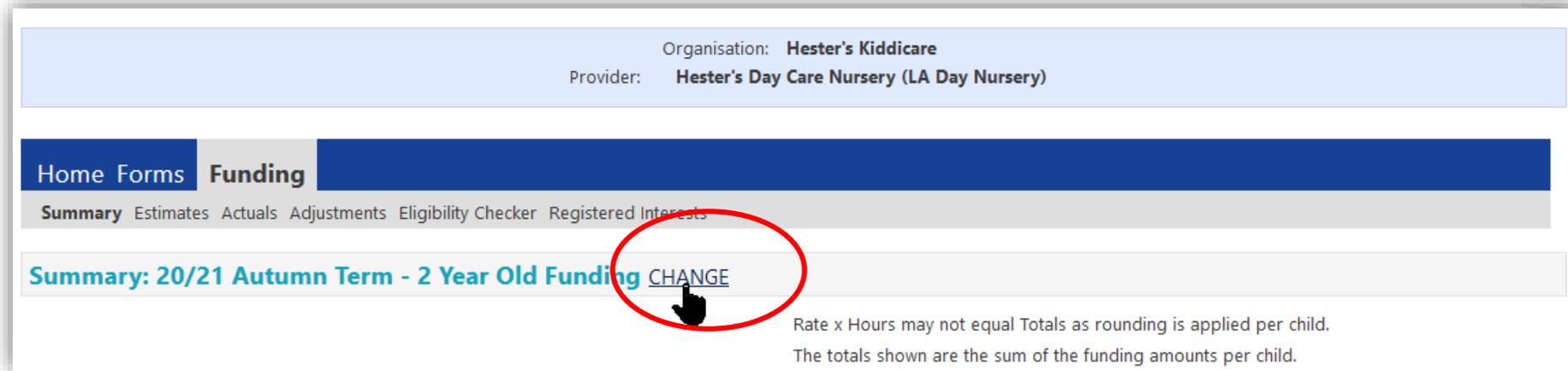
Getting Started with Synergy

3 and 4 Year Old Funding Procedure

Key Note: THE PROCESSES OVERVIEWED IN THIS SECTION ARE MORE OR LESS **IDENTICAL** TO THE 2 YEAR OLD SUBMISSION PAGES

If you are still in the 2 Year Old Funding screen you need to change to the 3 & 4 Year Old Funding area

- Click the **Change** option



Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary: 20/21 Autumn Term - 2 Year Old Funding **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.

- Select the appropriate term then choose Select **3 & 4 Year Old**
- Click on the **Estimates** tab.

Getting Started with Synergy

3 and 4 Year Old Funding - Selecting

- Or you can click the **Funding** tab and choose **Summary**→**Autumn Term**→**3 and 4 Year Old**.

NOTE: You will be able to see the screen below from click on the Summary, Estimates, Actual tab when doing a switch from 2 Year Old to 3 and 4 Year old and vice versa.

The screenshot displays the Synergy Funding interface for Hester's Kiddicare. The top header shows the Organisation as 'Hester's Kiddicare' and the Provider as 'Hester's Day Care Nursery (LA Day Nursery)'. Below this is a navigation bar with 'Home Forms' and 'Funding' tabs. The 'Funding' tab is selected and contains sub-tabs: 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. The 'Summary' sub-tab is selected. Below the navigation bar is a section titled 'Summary Head Count Records for 20/21 - Autumn Term'. On the left, there is a list of terms: '20/21', 'Spring Term', and 'Autumn Term'. The 'Autumn Term' is selected. On the right, there is a table with the following structure:

Funding Type	
	2 Year Old Funding
	3 & 4 Year Old

Red circles and arrows indicate the following steps:

1. Click on the 'Funding' tab.
2. Click on the 'Summary' sub-tab.
3. Click on the 'Autumn Term' in the term selection list.
4. Click on the '3 & 4 Year Old' link in the Funding Type table.

Getting Started with Synergy

3 and 4 Year Old Funding – Submitting the Estimates

- From the Estimates tab complete the field:
 - **Number of Weeks for this Term** i.e. 13.00
 - **Estimate Number of Funded Hours Per Week for this Term** i.e. *number of children x number of hours per week = total hours per week for the term*
- Click the **Calculate** button. It is important to change any entry before you click the Send Claim button
- Click the **Send Claim** button only when you are ready to submit. Once the local authority imports your Estimates, the Send Claim button will be disabled

Organisation: **Hester's Kiddicare**
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker Registered Interests

Submit Estimate: 20/21 Autumn Term - 3 & 4 Year Old CHANGE

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

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

Calculate **Send Claim**

Enter the Number of Weeks and the Number of Funded Hours

Getting Started with Synergy

3 and 4 Year Old Funding – The Summary Tab

- Click the **Summary** tab, notice your Estimates have now been updated based on your submission
- This tab shows information on how payments are calculated with Estimates and Actuals. Initial payments balances will be zero

Notice the Estimate figures on the left and the Actuals on the right

Organisation: Hester's Kiddicare
Provider: Hester's Day Care Nursery (LA Day Nursery)

Home Forms **Funding**

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

Summary: 20/21 Autumn Term - 3 & 4 Year Old CHANGE

Rate x Hours may not equal Totals as rounding is applied per child.
The totals shown are the sum of the funding amounts per child.

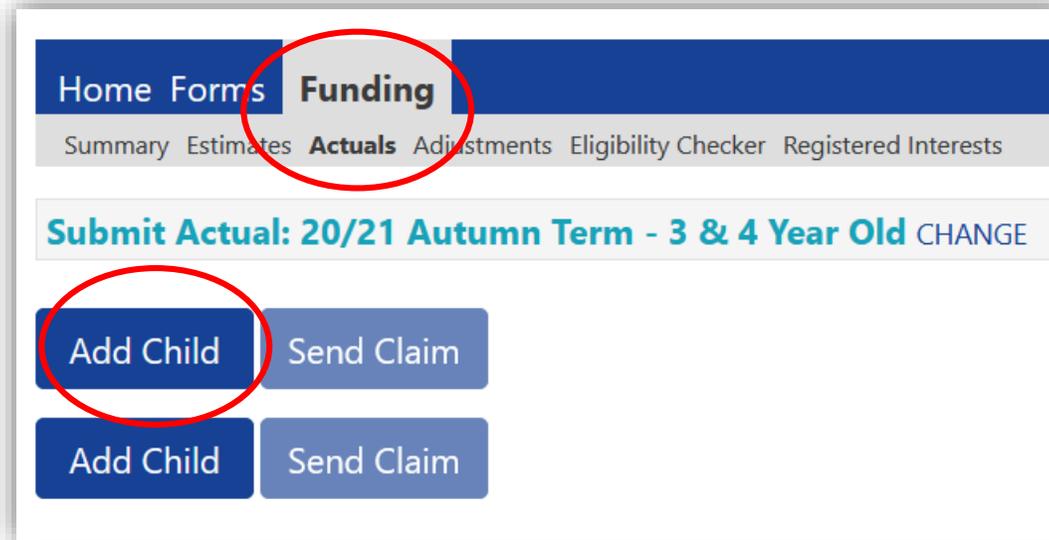
Estimates		Actuals	
Term Length (weeks)	13.00	Term Length (Weeks) Term Time	13.00
Provider Rate applied	£4.80	Provider Rate applied to child funding	£4.80
Estimate Funding		Universal Funding	
Hours Per Week	195.00	Funded Hours for Term	80.00
Term Funding Amount	£12168.00	Funding Amount @ Provider Rate	£384.00
Interim %	50.00%		
Interim Amount Payable	£6084.00	Universal Funding Amount	£384.00
		Extended Funding	
Total Interim Amount Paid to Date (before Adj)	£0.00	Funded Hours for Term	72.00
		Funding Amount @ Provider Rate	£345.60
Interim Amount Payable Balance	£6084.00	Extended Funding Amount	£345.60
		Totals	
Processed	Yes	Funded Hours for Term	152.00
Processed Date	27-Nov-2020	Funding Amount @ Provider Rate	£729.60
		Child Weightings	£0.00
		Term Funding Amount	£729.60
		Interim Amount Paid (before Adj)	£0.00
		Term Funding Amount Balance	£729.60
		Adjustments Paid with Final Payment	£0.00
		Actual Amount Paid (Inc. Adj)	£729.60

Getting Started with Synergy

3 and 4 Year Old Funding – Submitting Actuals

- From the **Funding** tab select **Actuals** tab
- Click the **Add Child** button
- Complete the following tabs:
 - **Child Details**
 - **Parent/Carer**
 - **Funding Details**

These tabs are covered in the following pages



Getting Started with Synergy

3 and 4 Year Old Funding – Headcount Submission

Remember the process follows the same 3 stages
A) Estimate
B) Actuals
C) Adjustments

The CHILD DETAILS tab

- Click the **Actuals** tab and click **Add Child**

Complete the Child Details tab

- When completing the **Address** only the first line of the address (*Address Line1*) and **Postcode** are mandatory
- Check the **Proof of DOB** tick box to verify that you have seen proof of the child's date of birth

The screenshot shows the 'Child Details' form in the Synergy Funding system. The 'Actuals' tab is selected in the top navigation bar. The 'Child Details' sub-tab is also selected and circled in red. The form contains two main sections: 'Child Details' and 'Address'. The 'Child Details' section includes fields for Forename* (Jimmy), Middle Name, Surname* (James), DOB* (13-Sep-2018), Proof of DOB (checked), Gender* (Male checked, Female unchecked), Preferred Surname, Ethnicity* (Other Black), and SEN COP Stage* (Education, Health and Care Pl...). The 'Address' section includes Address Line 1* (1), Address Line 2, Address Line 3, Locality, Town, County, and Postcode* (E2 8BS). A red speech bubble points to the asterisks on the 'Forename*', 'Surname*', 'Address Line 1*', and 'Postcode*' fields, stating 'Complete fields with an *(asterisk) as these are mandatory'. A red box highlights the 'Child Details' and 'Address' sections. At the bottom, there are 'Save' and 'Cancel' buttons and a note: '*denotes mandatory fields'.

Getting Started with Synergy

3 and 4 Year Old Funding – Submitting Adjustments

Key Note: If claiming only the Universal 15 hours you do not need to complete the Parent/Carer details unless claiming EYPP

The 'PARENT/CARER DETAILS' tab

- Complete the fields;
 - Forename**
 - Surname**
 - DOB**
 - NI or NASS**
- **Tick to give consent for Eligibility Checking for EYPP or 30 Hours**
- Click **Save**

NOTE: Ensure you have ticked all relevant consent boxes where Parent/Carers have given permission

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Child Details **Parent / Carer Details** Funding Details 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="Bob"/>	Forename	<input type="text"/>	
Surname	<input type="text" value="James"/>	Surname	<input type="text"/>	
DOB	<input type="text" value="20-Aug-1989"/>	DOB	<input type="text"/>	
<input checked="" type="checkbox"/> NI or	<input type="checkbox"/> NASS Number	<input type="checkbox"/> NI or	<input type="checkbox"/> NASS Number	
<input type="text" value="NN112220A"/>		<input type="text"/>		
Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP	<input checked="" type="checkbox"/> 30H		
		Tick to give consent to Eligibility Checking for	<input type="checkbox"/> EYPP	<input type="checkbox"/> 30H

Save Cancel *denotes mandatory fields

Getting Started with Synergy

3 and 4 Year Old Funding – Submitting Adjustments

The FUNDING DETAILS tab

Click the **Funding Details** tab:

- Enter the **Start Date** and **End Date**, or click the **Default Term Dates**
- Enter the number of **Weeks Attended in Term** (number of weeks being claimed)
- Select if the child will be **Present during Census**
- Select if the child **Attends Two Days or More**

NOTE: You must tick the above if you wish to claim more than 10 hours per week

- Select whether or not the parent has nominated you to receive **DAF (Disability Access Funding)**
- Optional: Attendance Days
- Ensure the **Universal Hours**
- Enter the **Extended Hours**
- Enter the **30H Eligibility Code**

Continue on the following page

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

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

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

Funding Details

Start Date* 01-Sep-2020

End Date* 31-Dec-2020

Default Term Dates

Weeks Attended in Term* 10.00

Present during Census

Attends Two Days or More

Nominated for DAF* Yes No

Universal Funded Hours per Week

Universal Hours* 12

Extended Funded Hours per Week

Extended Hours* 11

30H Eligibility Code 73108208002

30 Hours Free Childcare

Eligible for 30H

Total Funded Hours per Week

Total Funded: 23.00

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

Maximum Values Allowed:

Number of Weeks: 13.00

Universal Weekly Hours: 10

Universal Termly Hours: 130

Universal Yearly Hours: 380

Extended Weekly Hours: 10

Extended Termly Hours: 130

Extended Yearly Hours: 380

Save Cancel *denotes mandatory fields

Getting Started with Synergy

3 and 4 Year Old Funding – Submitting Adjustments

The FUNDING DETAILS tab continued

- Click the **30 Hours Free Childcare** button
A message confirming eligibility will appear near the top of the screen
- Click **Save** to return to the Actuals screen
You can now view the eligibility dates and grace periods in the Eligibility Status highlighted in the screen
- To edit any details, click on the Child name and amend the details as required
NOTE: If you need to remove a child from the headcount, you must do so *before* you click the **Send Claim** button
- Once all children are added, click the **Send Claim** button to submit your headcount after doing so, the Status of the claim will change

3 & 4 Year Old Adjustments

To submit 3 and 4 year Old Adjustments refer to page 29 as this process is identical to the 2 year old Adjustments process. The only difference is you do not have the option to apply for an EY Voucher Code.

Important Note: Ensure that children are within the **eligibility dates** for the term or the additional hours will **NOT BE PAID!**

Getting Started with Synergy

3 and 4 Year Old Funding – Ad Hoc Eligibility Code Checks

Note: This must be done before the offer of the extended hours places and the inclusion of the extended hours claimed in the headcount

- Click the **Funding, Eligibility Checker** then the **30 Hours Free Childcare** button
- Click the **30 Hours Free Childcare** button
- Complete the next screen including all mandatory fields denoted with an asterisk (*). Enter the
 - **DERN/Eligibility Code**
 - **Parent/Carer NI Number**
 - **Eligibility Check box**
- Click **Submit**

The next screen gives you the result of the eligibility check as highlighted in the bar shown:

- Click on the **30 Hours Free Childcare** button to perform another eligibility check

Note: This is an ad-hoc check and does not get stored or added to your headcount

Organisation: Hester's Kiddicare
Provider: Hester's Day Care Nursery (LA Day Nursery)

Home Forms Funding
Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

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

30 Hours Free Childcare

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.

Eligibility Code* 73108208010
Child Date of Birth* 9-2-2017
Parent/Carer Forename
Parent/Carer Surname
Parent/Carer NI Number* NN112228A
Consent must be given for this Eligibility Check
Partner Forename
Partner Surname
Partner NI Number

*denotes mandatory fields

Submit Cancel



Contact: For general help, assistance and enquiries please email freechildcare@hackney.gov.uk

