*Synergy education management system*
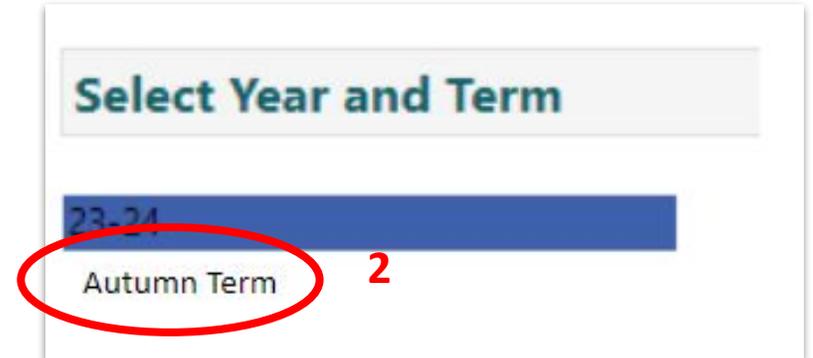
# Synergy

## Running the 30 Hours Eligibility Audit Report

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# Running the 30 Hours Eligibility Audit Report

**1**



- Login into the Synergy Portal as usual.

- If prompted, enter your **Memorable Word** and click **Submit.**



- Select the appropriate **Term.**

- Select the appropriate **Funding type.**



- Click on **Run Reports** at the top-right of the menu bar.

# Running the 30 Hours Eligibility Audit Report

- When the Run Report window pops up, ignore the first (Report) drop-down list.
- Select **Microsoft Excel Spreadsheet (Excel)** from the second (Format) drop-down list.
- Check the box that reads **Open Report after creation**
- Finally, click the **run report** button

    The report will appear at the bottom-left of your web browser window and in most cases will appear in your default Downloads folder.

- To see any historical reports, click on the Reports tab.
- Click the **Download** button to re-download the report.

# The 30H report and the actions you need to take



Extended Hours Report: Produced on 09/08/2023 using the Summer Term data, commencing 01/04/2023.
**This report is based on children added to a headcount via the Synergy Portal.**

| Forename | Surname | DOB | POSTCODE | DERN | Eligibility Start | Eligibility End | Grace Period End | Eligibility Status | Exception |
|---|---|---|---|---|---|---|---|---|---|
| Aaron | A | 27/06/2019 | E8 1GQ | 500000001 | 01/06/2022 | 31/01/2024 | 31/04/2024 | Eligible | Scenario A: No Action |
| Billy | B | 04/12/2018 | E2 3AF | 500000002 | 01/03/2023 | **31/08/2023** | 31/12/2023 | Eligible | Scenario B: "The End Date is due to expire. The parent/carer should re-confirm eligibility with HMRC immediately and must re-confirm eligibility before the end of this term." |
| Chrissy | C | 05/12/2018 | E1 5PG | 500000003 | 15/03/2022 | 08/06/2023 | **31/08/2023** | Eligible | Scenario C: "The Grace Period is due to expire. The child will not be eligible in the next term unless eligibility is reconfirmed before the end of this term." |
| Dana | D | 13/11/2018 | E9 7GH | 500000004 | 20/01/2022 | **07/03/2023** | **31/05/2023** | Eligible | Scenario D: "The setting will no longer be able to claim extended hours for this child unless the parent re-confirms eligibility immediately." |

Action 1

Action 2

Action 3

Action 4

# Guidance as to how to interpret the report

| Exception Message on the report | Action ref | Action to follow |
|---|---|---|
| *No Action* | **1** | No action at this stage. Monitor the code end date to ensure that it is not expiring within the term. |
| *The End Date is due to expire. The parent/carer should re-confirm eligibility with HMRC immediately and must re-confirm eligibility before the end of this term.* | **2** | You need to ask the parents to renew before the end date otherwise there might be a break on the child's eligibility and there is a risk of losing funding |
| *The Grace Period is due to expire. The child will not be eligible in the next term unless eligibility is reconfirmed before the end of this term* | **3** | The parents must renew as soon as possible. Please encourage the parent to act promptly. There is a risk that the code might not be valid for the next term. The code will still be valid for the current academic term. N.B. the code is not valid if the child is starting at your setting during the Grace period (term) |
| *The setting will no longer be able to claim extended hours for this child unless the parent re-confirms eligibility immediately.* | **4** | You need to inform the parents that they must re-apply. The code won't be valid to use within the current term. |

For general help, training, assistance and enquiries please email
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