

LBHF Early Years Provider Portal

These user guides cover using the Early Year Provider Portal and includes extra information for providers offering extended 30 hours. If you wish to offer the extended hours, please contact your local Early Years Team.

The guides will show you how to log on and navigate, enter child data and submit headcount claims, perform eligibility checks, record sufficiency and view a breakdown of funding based on your claim.

Contents

Logging onto the system	2
Changes to the Provider Portal	3
Estimates.....	3
Entering Actuals	5
Adding children.....	6
Add Child	6
Parent/Carer Details	6
Funding Details	8
Adding a child with Extended 15 Hours to the headcount	9
Eligibility Checker	9
Add Child	10
Parent Carer Details	11
Funding Details	12
Voucher Code Information.....	13
Children Rolled Over from Previous Term.....	14
Icons and links.....	15
Submitting your Headcount	16

Logging onto the system

To access the Provider Portal please go to the following URL:

<https://tri-borough.cloud.servelec-synergy.com/LBHF/FIS/Synergy/Login.aspx>

This will take you to the login screen.

The Portal cannot be found via a web search, please only use the link provided.

The image shows a screenshot of a web login page titled "Synergy: Sign in". At the top, there is a dark blue header with the text "Synergy: Sign in" in white. Below the header, the text "Enter your username" is displayed above a white text input field with a blue border. At the bottom of the form, there are two buttons: a dark grey button on the left labeled "Create Account" and a blue button on the right labeled "Next".

Enter the username and password provided to you. Upon entry, you will be taken to the landing page for the portal.

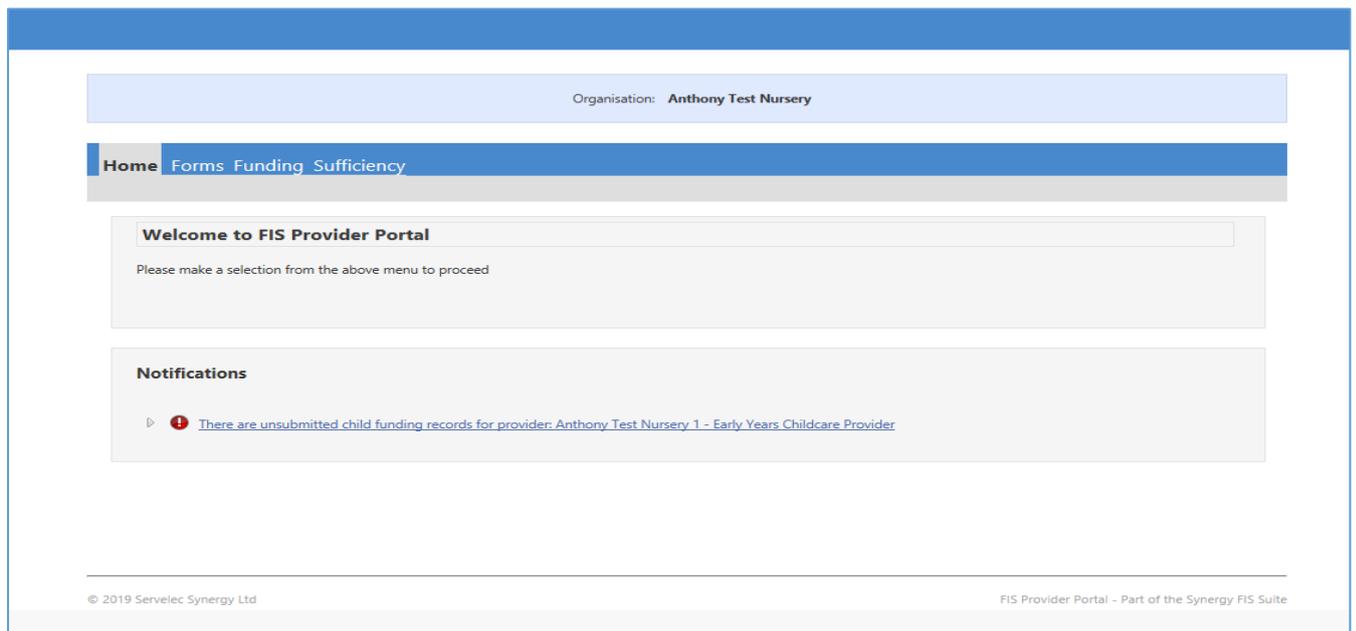
This is an updated version of the Provider Portal, your login details have not changed

If you have forgotten your password, click the "Forgotten Your Password" link. You will be asked for your login ID. Click "Request Token Via Email". A Token Code will be sent to the email address stored on the portal. Once received copy this in to the relevant box and input/confirm your new password then click "Change Password"

Please ensure that you inform Renee.Daley@lbhf.gov.uk of any changes of email addresses or to check we have the correct details.

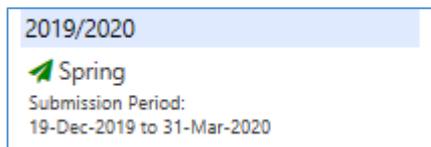
The Provider Portal is compatible with Microsoft Internet Explorer Versions 10 & 11, Microsoft Edge, Google Chrome & Apple Safari. We do not advise the use of any other browser software.

Changes to the Provider Portal



The latest version of the Provider Portal has some format changes.

- The Funding Tab – Current terms within the “Summary, Estimates and Actuals” are easier to find as they are marked with a Green Arrow

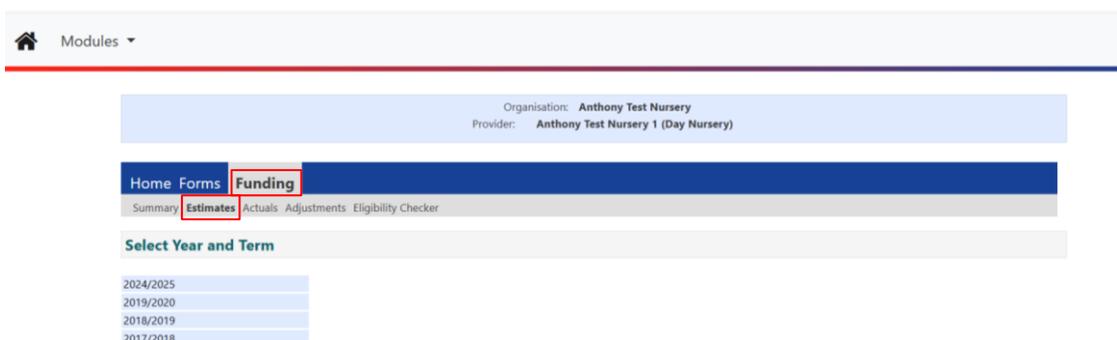


- Parent & Carer Details – consent check boxes to indicate consent for sharing data for 30 Hours or EYPP is given

Estimates

The estimate data is a request for child numbers/ hours for the upcoming term so an advanced payment can be made. It is not a request for child details.

Under the funding tab, select ‘Estimates’.



Select the Year and Term to be updated, live terms are shown with green indicators.
(Providers registered for under 2's, 2yr olds and 3&4 yr olds offers will have three terms to update).

2019/2020
 Spring
Submission Period: 19-Dec-2019 to 31-Mar-2020

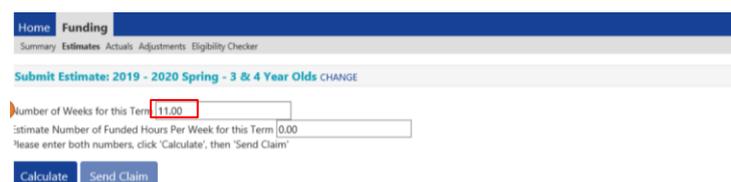
Select the Funding Type you would like to make a submission for.

		Office use only	
	Funding Type	Ready To Process	Processed
	2024/2025 H&F 2yr Old		
	2024/2025 H&F 3&4yr Old		
	2024/2025 H&F 9 Months - 2 Year Old		

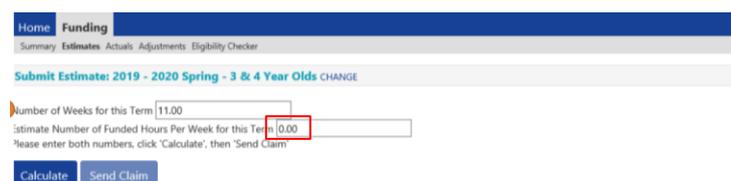
Check the 'Number of Weeks for this Term' field – this will be pre-populated to 12.6666 weeks.

(38 weeks per year / 3 terms = 12.6666 weeks per term).

If you are not open for 38 weeks per year, please update this field to the number of weeks you are claiming for this term.



Enter the 'Estimated Number of Funded Hours Per Week' as a total of the weekly funded hours for all children that you are expecting to attend your setting



For example, if you have 12 children accessing 15 funded hours each per week – 12 children x 15 hours = 180 hours

Click 'calculate'.

A message will appear advising of the total number of hours that are being claimed for all children for the term - check that this is correct.

Home Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Submit Estimate: 2019 - 2020 Spring - 3 & 4 Year Olds CHANGE

Number of Weeks for this Term

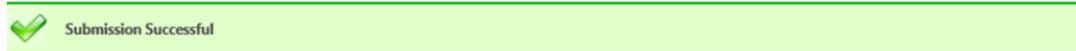
Estimate Number of Funded Hours Per Week for this Term There are 1,595.00 Hours in this Term

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

Calculate Send Claim

Click 'send claim'.

A green bar will appear at the top to confirm that the submission has been successful.



Note: You will need to make an individual submission for under 2's, 2yr olds and 3&4 yr olds.

Although estimate payments are made, without the actuals being entered at headcount to confirm the children, the assumption will be made that the child is not attending with you. This will result in the money being clawed back in the next payment. An email detailing portal open times for adding actuals is sent at the beginning of a new term.

Entering Actuals

Selecting 'Actuals' will take you to a screen that allows you to edit and enter new records for the term.

Select the Year and Term to be updated, live terms are shown with green indicators. (Providers registered for both the 2yr old and 3&4 yr. old offers will have two terms to update).

Organisation: Anthony Test Nursery
Provider: Anthony Test Nursery (Childcare On Domestic Premises)

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Actuals Head Count Records for 2019/2020 - Summer

2019/2020	Office use only		
	Funding Type	Ready To Process	Processed
Summer Submission Period: 01-Mar-2019 to 31-Mar-2019	<input type="checkbox"/> 3&4 Year Old Funding Wcc		
2018/2019			
2017/2018			

On selecting the "Funding Type"

- If you are a new provider, the only option will be "Add Child"

Organisation: **Anthony Test Nursery**
Provider: **Anthony Test Nursery 1 (Nursery School / Class)**

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2019/2020 Spring - 3&4 Year Old Funding Wcc [CHANGE](#)

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

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

- Existing providers with children rolled over from the previous term will have a list of children automatically copied from the previous term. Here you can add and amend children's attendance for the current term.

Adding children

Add Child

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Name: Jones Stacey DOB: 09-Sep-2015

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

Child Details		Address	
Forename*	Jones	Address Line 1*	40A Linden Avenue
Middle Name		Address Line 2	
Surname*	Stacey	Address Line 3	
DOB*	09-Sep-2015	Locality	
Proof of DOB	<input checked="" type="checkbox"/>	Town	London
Gender*	<input type="checkbox"/> Male <input checked="" type="checkbox"/> Female	County	
Preferred Surname		Postcode*	NW10 5QT
Ethnicity*	Black North American		
SEN COP Stage*	No special provision		

[Save](#) [Cancel](#) *denotes mandatory fields

Complete all mandatory child details fields marked with a *; ensure that the address details are correct. If in doubt, please check the address with the parent

Parent/Carer Details

If the child is not eligible for EYPP funding or your setting does not provide the additional hours, please leave this tab blank,

Name: Test Stern DOB: 17-May-2017

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

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

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

Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.

Parent / Carer Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Partner Details

Forename

Surname

DOB

NI or NASS Number

Tick to give consent to Eligibility Checking for EYPP 30H

Save

Cancel

*denotes mandatory fields

Consent for Eligibility Checking for either EYPP or 30 Hours funding must be ticked if this is being claimed

Funding Details

Organisation: **Anthony Test Nursery**
 Provider: **Anthony Test Nursery (Childcare On Domestic Premises)**

Home
Forms
Funding
Sufficiency

Summary
Estimates
Actuals
Adjustments
Eligibility Checker

Name: Jones Stacey DOB: 09-Sep-2015

Summary
Child Details
Parent / Carer Details
Funding 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*

Extended Funded Hours per Week

Extended Hours*

30H Eligibility Code

30 Hours Free Childcare

Eligible for 30H

Total Funded Hours per Week

Total Funded:

Attendance Days

Attends Monday Yes No

Attends Tuesday Yes No

Attends Wednesday Yes No

Attends Thursday Yes No

Attends Friday Yes No

Attends Saturday Yes No

Attends Sunday Yes No

Non-Funded Hours per Week

Non-Funded Hours*

ⓘ if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer

Maximum Values Allowed:
 Number of Weeks: **12.6666**

 Universal Weekly Hours: **15**
 Universal Termly Hours: **570**
 Universal Yearly Hours: **570**

 Extended Weekly Hours: **15**
 Extended Termly Hours: **570**
 Extended Yearly Hours: **570**

Save
Cancel

*denotes mandatory fields

If child attends for the full term please use the default dates, if child starts/leaves on different dates please use them instead. These dates are not used by the system to calculate any funding. Instead you should change the figure in 'Weeks attended in Term' accordingly.

The standard number of weeks for a full term of funding for most providers is 12.6666 However, some providers open for less weeks. Please ensure you enter the correct number of weeks for your setting and in relation to the child's attendance that term.

'Nominated for DAF'. Only select 'Yes' if child claims Disability Living Allowance. Proof will need to be sent to the Funding officer, to arrange a one-off payment of £615 for the year.

'Universal Hours' is a maximum of 15, 'Extended Hours' should be '0' unless claiming additional hours (maximum of 15) through a code. Enter any 'Non-Funded Hours', if none enter '0'. Please ignore "Attendance Days", the red maximum values box is for office use only.

Click 'Save'.

Adding a child with Extended 15 Hours to the headcount

Eligibility Checker

All parents wishing to claim 30 hours funding should have the eligibility code checked before the beginning of term. Start & End dates must fall between dates specified by local authority.

Organisation: **Anthony Test Nursery**
Provider: **Anthony Test Nursery 1 (Nursery School / Class)**

HomeForms**Funding**Sufficiency

SummaryEstimatesActualsAdjustments**Eligibility Checker**

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

Select "30 Hours Free Childcare"

Enter the Eligibility Code, Child's DOB & Parent's National Insurance Number. Tick Consent Box and submit.

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*	<input type="text" value="71001207000"/>
Child Date of Birth*	<input type="text" value="15/05/2017"/>
Parent/Carer Forename	<input type="text"/>
Parent/Carer Surname	<input type="text"/>
Parent/Carer NI Number*	<input type="text" value="NX345678A"/>
Consent must be given for this	<input checked="" type="checkbox"/> Eligibility Check
Partner Forename	<input type="text"/>
Partner Surname	<input type="text"/>
Partner NI Number	<input type="text"/>

*denotes mandatory fields

Submit

Cancel

Organisation: **Anthony Test Nursery**
 Provider: **Anthony Test Nursery 1 (Nursery School / Class)**

Home Forms **Funding** Sufficiency

Summary Estimates Actuals Adjustments **Eligibility Checker**

 The details provided have been found:

Eligibility Code: 71001207000
 Code Start Date: 10-Jan-2020
 Code End Date: 20-Mar-2020
 Grace Period End Date: 20-Mar-2020

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](#)

This shows a successful search, if the box is red please check the details again. The start date must be no later than the 14th of the first month in the new term to be valid.

Add Child

Organisation: **Anthony Test Nursery**
 Provider: **Anthony Test Nursery (Childcare On Domestic Premises)**

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Name: Samuel Test DOB: 27-May-2015

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

Child Details		Address	
Forename*	<input type="text" value="Samuel"/>	Address Line 1*	<input type="text" value="41"/>
Middle Name	<input type="text"/>	Address Line 2	<input type="text" value="Short Road"/>
Surname*	<input type="text" value="Test"/>	Address Line 3	<input type="text"/>
DOB*	<input type="text" value="27-May-2015"/>	Locality	<input type="text"/>
Proof of DOB	<input checked="" type="checkbox"/>	Town	<input type="text"/>
Gender*	<input checked="" type="checkbox"/> Male <input type="checkbox"/> Female	County	<input type="text" value="London"/>
Preferred Surname	<input type="text"/>	Postcode*	<input type="text" value="E14 0BA"/>
Ethnicity*	<input type="text" value="Mixed - White + Black Caribb"/>		
SEN COP Stage*	<input type="text" value="Statement"/>		

*denotes mandatory fields

Complete all the mandatory fields on the 'Child Details' tab, please ensure the address details are correct otherwise the record cannot be validated. If in doubt please ask parent for proof of address.

Parent Carer Details

Organisation: Anthony Test Nursery	
Provider: Anthony Test Nursery (Childcare On Domestic Premises)	
Home Forms Funding Sufficiency	
Summary Estimates Actuals Adjustments Eligibility Checker	
Name: Samuel Test DOB: 27-May-2015	
Summary Child Details Parent / Carer Details Funding Details	
<p>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.</p> <p>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.</p> <p>Details are optional but if entered then at least Forename, Surname and NI or NASS Number must be filled in.</p>	
Parent / Carer Details	Partner Details
Forename <input type="text" value="Stan"/>	Forename <input type="text"/>
Surname <input type="text" value="Test"/>	Surname <input type="text"/>
DOB <input type="text" value="16-Apr-1985"/>	DOB <input type="text"/>
<input checked="" type="checkbox"/> NI or <input type="checkbox"/> NASS Number <input type="text" value="NA456798A"/>	<input type="checkbox"/> NI or <input type="checkbox"/> NASS Number <input type="text"/>
Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input checked="" type="checkbox"/> 30H	Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input type="checkbox"/> 30H
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	*denotes mandatory fields

Add the parent's details as above, remember to tick EYPP or 30 Hours consent boxes if claiming.

Funding Details

Organisation: **Anthony Test Nursery**
 Provider: **Anthony Test Nursery (Childcare On Domestic Premises)**

Home Forms
Funding
Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Name: Samuel Test DOB: 27-May-2015

Summary Child Details Parent / Carer Details **Funding 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*

Extended Funded Hours per Week

Extended Hours*

30H Eligibility Code

30 Hours Free Childcare

Eligible for 30H

Total Funded Hours per Week

Total Funded:

Attendance Days

Attends Monday Yes No

Attends Tuesday Yes No

Attends Wednesday Yes No

Attends Thursday Yes No

Attends Friday Yes No

Attends Saturday Yes No

Attends Sunday Yes No

Non-Funded Hours per Week

Non-Funded Hours*

⚠️ if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carers

Maximum Values Allowed:
 Number of Weeks: **12.6666**

 Universal Weekly Hours: **15**
 Universal Termly Hours: **570**
 Universal Yearly Hours: **570**

 Extended Weekly Hours: **15**
 Extended Termly Hours: **570**
 Extended Yearly Hours: **570**

Save
Cancel

*denotes mandatory fields

Complete all required fields: Universal Hours maximum value is '15', 'Extended Hours' can be up to 15

'Present during Census' should only be ticked in the Spring Term, 'Nominated for DAF' should be 'No' unless parents have nominated your setting to receive this payment, (this should only be selected once per year).

'Attendance Days' should be left blank; 'Non-Funded Hours per Week' should be set to '0' unless the child attends over 30 hours per week.

Enter the 11-digit Voucher code. Then click "30 Hours Free Childcare"

The voucher code and parent details will then be checked via the online ECS system. If successful, you will see the message below.

Voucher Code Information

Voucher Codes should be checked at the beginning or if possible before the end of previous term to ensure continuity of funding. Codes that have not been renewed by parents before end of a term may not be eligible for further funding.

The initial validation check includes the “Grace Period”. A code within its grace period is not acceptable at the start of term...

An example an eligibility check made for Spring Term 2020

- Start date 02/01/2020
- End date 25/03/2020
- Grace Period up to 20/04/2020

A renewed code must end after the 1st day of the new term to be eligible. E.G. (02/01/2020). If you check a code and its end date is before the 1st day of the new term it is not eligible.

New codes must start on or before the 14th day of the first month of term. If the code is not recognised providers should contact parents and ask them to speak to HMRC as a matter of urgency.

Cut off dates for applications for new codes or renewal:

31/03 for Summer Term
31/08 for Autumn Term
31/12 for Spring Term

If parent has not applied for ...or renewed the validation code before DFE cut-off dates below, the Authority is under no obligation to fund additional hours.

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

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

Name: Samuel Test DOB: 27-May-2015

Summary Child Details Parent / Carer Details **Funding 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*

Extended Funded Hours per Week

Extended Hours*

30H Eligibility Code

30 Hours Free Childcare

Eligible for 30H

Total Funded Hours per Week

Total Funded:

Attendance Days

Attends Monday Yes No

Attends Tuesday Yes No

Attends Wednesday Yes No

Attends Thursday Yes No

Attends Friday Yes No

Attends Saturday Yes No

Attends Sunday Yes No

Non-Funded Hours per Week

Non-Funded Hours*

 if this child attends another setting as well as yours, be sure to enter the hours as per what has been agreed with the child's parent/carer

Maximum Values Allowed:

Number of Weeks: **12.6666**

Universal Weekly Hours: **15**

Universal Termly Hours: **570**

Universal Yearly Hours: **570**

Extended Weekly Hours: **15**

Extended Termly Hours: **570**

Extended Yearly Hours: **570**

Click 'Save'

Children Rolled Over from Previous Term

If you have children rolled from previous terms, various options are available:

- Edit Child
 - Child & Parent information can be amended before headcount submission only. Any field in the record can be amended.
- Add Child
 - New children can be added to the headcount before submission.
- Delete Child
 - Children can be deleted from the headcount before submission.

Organisation: **Anthony Test Nursery**
 Provider: **Anthony Test Nursery (Childcare On Domestic Premises)**

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submit Actual: 2018/2019 Spring - 3&4 Year Old Funding Wcc [CHANGE](#)

 Not submitted

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

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	Unchanged	Stacey Jones (09-Sep-2015)	180.00	0.00	£1152.00		
	 Add Pending	Test, Anthony (06-Jun-2015)	135.00	135.00	£1728.00		10-Jan-2019 - 09-Feb-2019 Grace Period: 09-Feb-2019
	 Add Pending, Submitted	Test, Samuel (27-May-2015)	180.00	180.00	£2304.00		10-Jan-2019 - 09-Feb-2019 Grace Period: 09-Feb-2019
	Unchanged	Test, Tricia (01-Jun-2015)	150.00	0.00	£1575.00		

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

© 2019 Servelec Synergy Ltd FIS Provider Portal - Part of the Synergy FIS Suite

Icons and links

-  Request Delete, same as link on previous versions request deletion of child from current headcount.
- Status** Child record will be marked as unchanged, delete pending, edit pending, submitted pending or submitted.
- Child Name** Link to child record, also shows DOB.
- Universal Hours (inc Adj)** All children receive up to 15 universal hours
- Extended Hours (inc Adj)** Extended hours only apply to children in receipt of the additional 15 hours funding
- Total Funding Amount for Term (inc Adj)** Funding per child including standard rate, and any weighted funding (deprivation and/or EYPP)
- Child Weightings** Shows if child is receiving deprivation and/or EYPP.
- Eligibility Status** Applies only to children accessing extended hours. Shows voucher start & end dates and grace period.
-  Child is now within grace period of the voucher. Eligibility for extended funding ends at the end of this period unless code is reconfirmed by parent/carer via the HMRC website.

Note that children marked with a record of unchanged will require amendment to allow Portal to recognise that new weightings or updated 30 hours codes that may need to be applied.

Click on the child record, and then select save ...this will insure that the record is updated if no weightings were applied for the previous term.

All Providers should check their headcount to ensure no children that have left in the previous term are still shown.

Submitting your Headcount

When you have made all your changes, click 'Send Claim'.

On pressing 'Send Claim' you will be informed that the submission has been successful, and the following message will be displayed on the screen:

Home Forms **Funding** Sufficiency

Summary Estimates **Actuals** Adjustments Eligibility Checker

Submission Successful

Submit Actual: 2018/2019 Spring - 3&4 Year Old Funding Wcc [CHANGE](#)

Add Child
Send Claim

	Status	Child Name	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
↻	Edit Pending, Submitted	Stacey, Jones <small>(09-Sep-2015)</small>	180.00	0.00	£1152.00		
↻	Add Pending, Submitted	Test, Anthony <small>(06-Jun-2015)</small>	135.00	135.00	£1728.00		10-Jan-2019 - 09-Feb-2019 Grace Period: 09-Feb-2019
↻	Add Pending, Submitted	Test, Samuel <small>(27-May-2015)</small>	180.00	180.00	£2304.00		10-Jan-2019 - 09-Feb-2019 Grace Period: 09-Feb-2019
↻	Edit Pending, Submitted	Test, Tricia <small>(02-Jun-2015)</small>	150.00	0.00	£1575.00		

Add Child
Send Claim

If your submission has not been successful, please check your records and resubmit. If you continue to have issues with submission, please contact Renee.Daley@lbhf.gov.uk