



# **Early Years Synergy Portal User Guide**

**May 2023**

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## **1. General Information**

The Synergy FIS Provider Portal allows childcare providers to securely submit and access funding information through the internet.

The portal enables the effective collection and submission of Free Early Years Entitlement Funding claims data for 2, 3 and 4 year old children.

The portal:

- ✓ Provides a system that ensures Durham County Council Early Years Team needs and monitoring requirements are met.
- ✓ Provides a standardised method for data collection and maintains data integrity.
- ✓ Provides a standardised and efficient method for administering funding for all providers.

### **Durham County Council Early Years Team will:**

- Provide user training to all providers.
- Support all providers with the usage of the system.
- Provide user access to the system.
- Undertake ad hoc audits to ensure data quality and integrity.
- Provide relevant documentation that can be accessed by users.
- Notify providers of updates/changes to the system through nominated representatives/managers.

### **Childcare providers will:**

- Ensure accurate information about children attending the setting is submitted to the LA by the set date. Failure to do this will lead to delays in processing and therefore receipt of monies due.
- Ensure accurate data quality and integrity.
- Ensure access is granted to the right members of staff by the LA.
- Co-operate fully with the audits set out by Durham County Council.
- Ensure all staff comply with General Data Protection Regulations 2018.
- Inform all relevant staff about updates or changes to the system as notified by the LA.

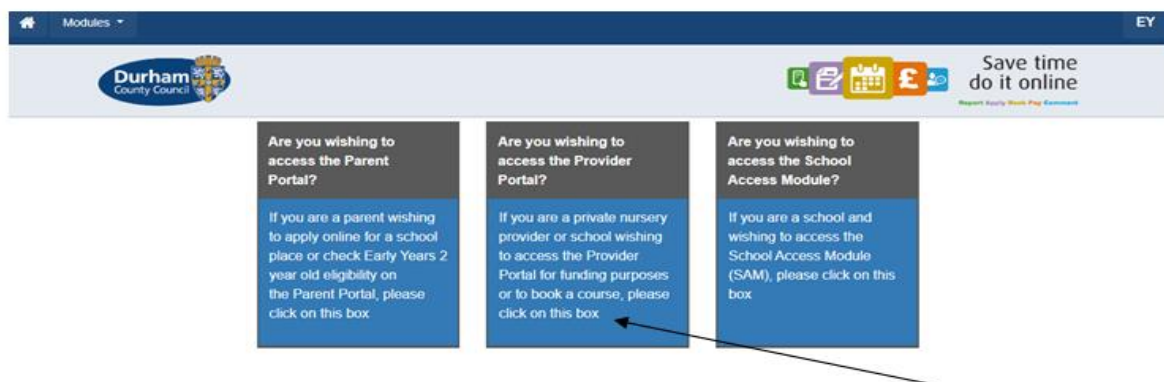
## 2. Accessing FIS Provider Portal

FIS Provider Portal can be accessed from the link below:

<https://education.durham.gov.uk/SynergyWeb/Login.aspx?ReturnUrl=%2fsynergyweb%2fproviders%2f>

**NB The login link is case sensitive and is best used via the Google Chrome Application, please copy and paste the link to the Google Chrome browser.**

You see the screen below when you open the Synergy page.



You can see from the description in each box what you can access. For Early Years Funding and course bookings we can see that it is the middle box which will take you to the Provider Portal sign-in page.

## Sign In

Sign in or create an account with us.

Enter your username (for parents this will be your e-mail address)

Next

Create Account (only applicable for Parents)

Enter your Username and click next button.

The screen below will appear to enter password then click Sign In. Note: The password is case sensitive.

# Sign in

Enter your password

[Change User](#)

[Forgot Password](#)

[Sign In](#)

If you have forgotten your password, simply click on Forgotten your password?

If you are locked out of the system or you have any other problems, please contact the Early Years Funding Team via email on [EYfunding@durham.gov.uk](mailto:EYfunding@durham.gov.uk) or telephone 03000 262789

## 2.1 Multiple Users

For those Provider Portal users who have access to more than one setting, then you will use your universal log in as normal, but then be met with a list of the multiple settings you have access to. The contents will appear in a drop-down list and simply select the setting you wish to access.

**Please select an Organisation below**

As you are linked to multiple Organisations you will need to select one in order to proceed.

Select Organisation:  [Proceed](#)

ES Provider Portal Home x +

https://education.durham.gov.uk/SynergyWeb/Providers/Registration.aspx

Childcare / Service Provider [Hello early years!](#) [Logout](#)

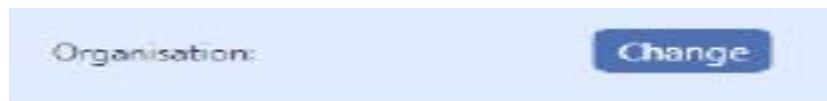
**Please select an Organisation below**

As you are linked to multiple Organisations you will need to select one in order to proceed.

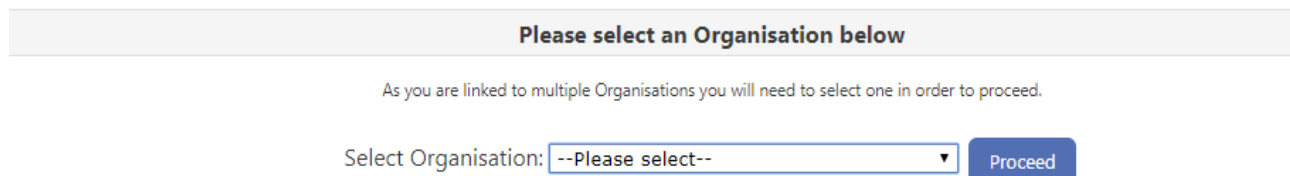
Select Organisation:  [Proceed](#)

--Please select--

If you wish to move between settings, please remember to save any inputs before you log out of one setting and into another. This can be done by clicking on the change icon at the top of each tab

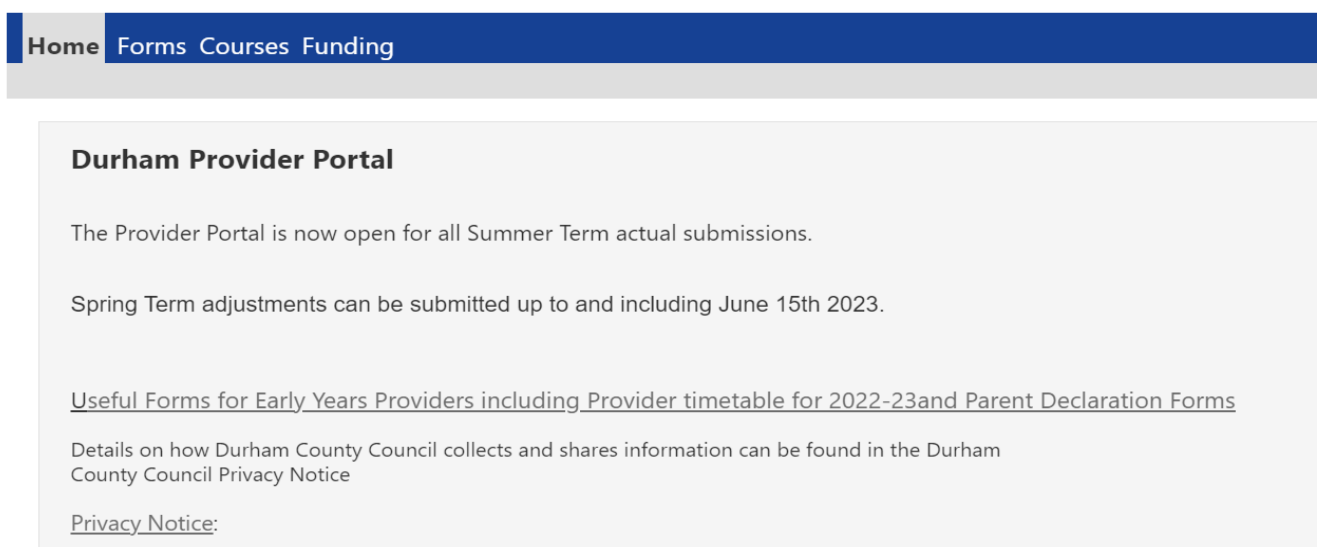
A screenshot of a settings interface. It features a light blue header bar with the text 'Organisation:' on the left and a blue button with the text 'Change' on the right.

This will then take you to the Contents Page of the setting you selected.

A screenshot of a selection screen. At the top, a grey bar contains the text 'Please select an Organisation below'. Below this, a smaller line of text reads 'As you are linked to multiple Organisations you will need to select one in order to proceed.' The main area contains the text 'Select Organisation:' followed by a dropdown menu showing '--Please select--' and a blue 'Proceed' button.

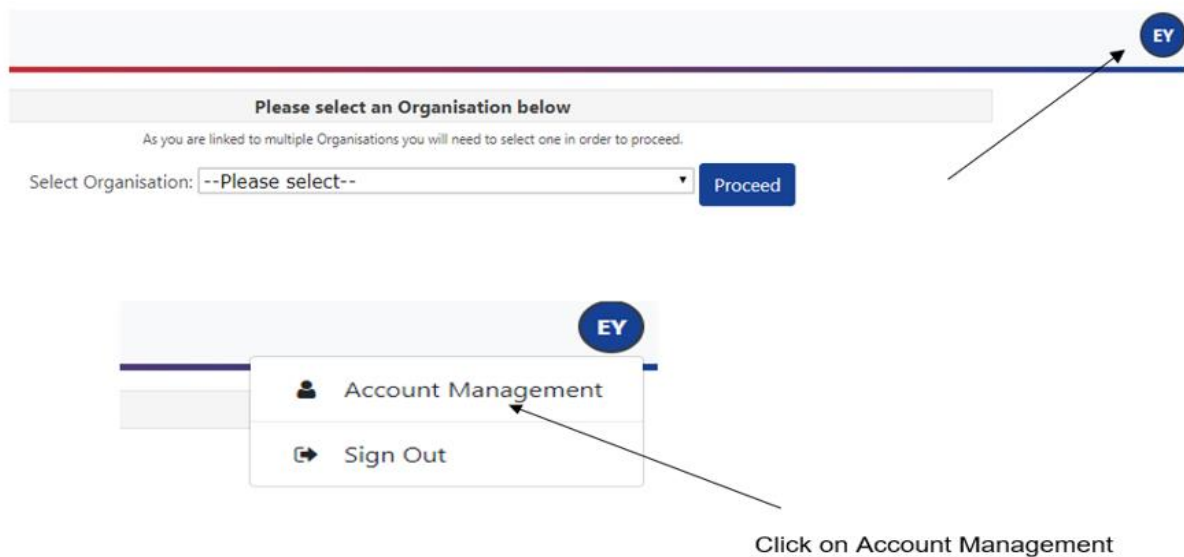
### 3 Home Page

Once you have logged in the following screen will be displayed. This is the Home Page and contains current important information regarding submissions plus links to our designated webpage.

A screenshot of the 'Durham Provider Portal' home page. It has a dark blue navigation bar with 'Home', 'Forms', 'Courses', and 'Funding' links. The main content area is light grey and contains the following text: 'Durham Provider Portal', 'The Provider Portal is now open for all Summer Term actual submissions.', 'Spring Term adjustments can be submitted up to and including June 15th 2023.', a link to 'Useful Forms for Early Years Providers including Provider timetable for 2022-23 and Parent Declaration Forms', and a link to 'Details on how Durham County Council collects and shares information can be found in the Durham County Council Privacy Notice'. At the bottom, there is a link for 'Privacy Notice:'.

#### 3.1 Changing your password

If you need change your password, click on the EY circle from the top right-hand corner of the screen, then select Account Management



You will then see a box saying 'Change Password' click on this box.

**Account Security**

Password Last Updated: 05/02/2020 [Change Password](#)

Type in your current password and press next.

**Change Password**

Enter your current password

[Back](#) [Next](#)

Type in your new password. The new password will need to follow the requirements shown below:

**Change Password**

New Password \*

Password fails requirements

Confirm Password \*

Please confirm your password

[Cancel](#) [Change Password](#)

Requirements:

- Alpha character ✓
- Uppercase character ✓
- Numeric character ✗
- Special character ✗
- 8 characters ✗
- Not username ✓

Type your new password once more in the confirm password box and click change password.

Once changed you will see the screen below, click finish.

Change Password

Your password has now been reset and you will be prompted for it when you next sign in

Finish



## 4 Funding

Click on the Funding tab from the homepage, from the Funding tab you can:

- Submit estimated hours and actual funding claims (headcount)
- View your termly summary (funding breakdown)
- Review adjustments paid or pending

### 4.1 Summary – view paid headcount

First of all, you need to select the term and age group you wish to view. These are shown within the collective financial year.

Home	Forms	Courses	<b>Funding</b>
Summary	Estimates	Actuals	Adjustments Eligibility Checker

Select Year and Term

EY 2023/2024

Summer Term

EY 2022/2023

Summer Term

Spring Term

Autumn Term

EY 2021/2022

Once you have selected your year & term combination, you will then be required to select the age-group detail you require.

Home	Forms	Courses	<b>Funding</b>
Summary	Estimates	Actuals	Adjustments Eligibility Checker

Summary Head Count Records for EY 2023/2024 - Summer Term

EY 2023/2024

Summer Term

EY 2022/2023

EY 2021/2022

Funding Type
2 Year Old
3/4 Year Old

This will take you directly to the summary tab for that term and age group.

Home Forms Courses <b>Funding</b>	
Summary Estimates Actuals Adjustments Eligibility Checker	
Summary: EY 2023/2024 Summer Term - 3/4 Year Old CHANGE	
<div> <div>Estimates</div> <div> <p>Term Length (Weeks) 13.00</p> <p>► Provider Rate applied £4.48</p> <p><b>Estimate Funding</b></p> <p>Hours Per Week 460.00</p> <p>Term Funding Amount £26790.40</p> <p>Interim % 75.00%</p> <p>Interim Amount Payable £20092.80</p> <hr/> <p>Total Interim Amount Paid to Date (before Adj) £20092.80</p> <hr/> <p>Interim Amount Payable Balance £0.00</p> <hr/> <p>Processed Yes</p> <p>Processed Date 03-Apr-2023</p> </div> </div>	
<div> <div>Actuals</div> <div> <p>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.</p> <p>Term Length (Weeks) Term Time 13.00</p> <p>► Provider Rate applied to child funding £4.48</p> <p><b>Universal Funding</b></p> <p>Funded Hours for Term 3900.00</p> <p>Funding Amount @ Provider Rate £17472.00</p> <p>► Child Weightings Total £483.60</p> <hr/> <p>Universal Funding Amount £17955.60</p> <p><b>Extended Funding</b></p> <p>Funded Hours for Term 2340.00</p> <p>Funding Amount @ Provider Rate £10483.20</p> <p>► Child Weightings Total £0.00</p> <hr/> <p>Extended Funding Amount £10483.20</p> <p><b>Totals</b></p> <p>Funded Hours for Term 6240.00</p> <p>Funding Amount @ Provider Rate £27955.20</p> <p>Child Weightings £483.60</p> <hr/> <p>Term Funding Amount £28438.80</p> <p>Interim Amount Paid (before Adj) £20092.80</p> <hr/> <p>Term Funding Amount Balance £8346.00</p> <p>Adjustments Paid with Final Payment £0.00</p> <hr/> <p>Actual Amount Paid (Inc. Adj) £0.00</p> <hr/> <p>Processed No</p> <p>Processed Date</p> </div> </div>	

## 4.2 Estimates

You must submit estimates on a termly basis. This is used to calculate your advance payment for the beginning of that funding period. You have the choice of receiving a one-off termly interim or monthly interims. Please contact [eyfunding@durham.gov.uk](mailto:eyfunding@durham.gov.uk) for further details of this option.


Within the funding tab select Estimates and then select the relevant term. You will be able to see which term is currently open for submissions as it will have a green icon next to the term - it will also show the relevant submission dates for that term.

Home Forms Courses **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

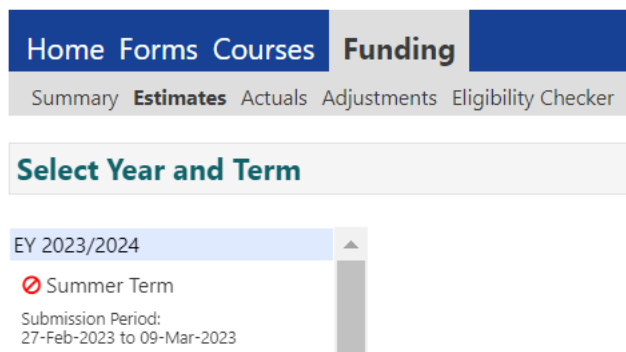
Select Year and Term

EY 2023/2024

 Summer Term

Submission Period:  
 27-Feb-2023 to 14-Apr-2023

If the submission date is not yet open, or has indeed closed, then the term will have a red icon next to it . Again it will show the relevant submission dates for that term.



Home Forms Courses **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

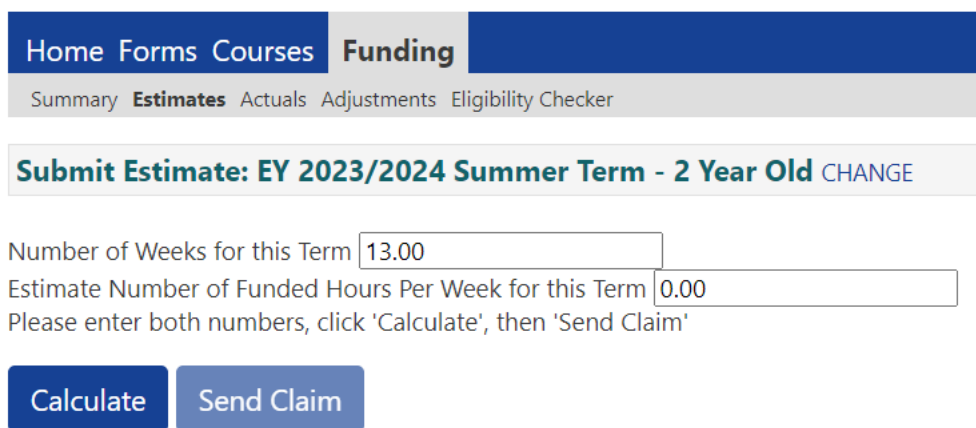
Select Year and Term

EY 2023/2024

⛔ Summer Term

Submission Period:  
27-Feb-2023 to 09-Mar-2023

Once you have selected your term you then need to select the age group required. This will take you to the following screen. Please remember not to amend the default number of weeks for the term.



Home Forms Courses **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

**Submit Estimate: EY 2023/2024 Summer Term - 2 Year Old** [CHANGE](#)

Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term

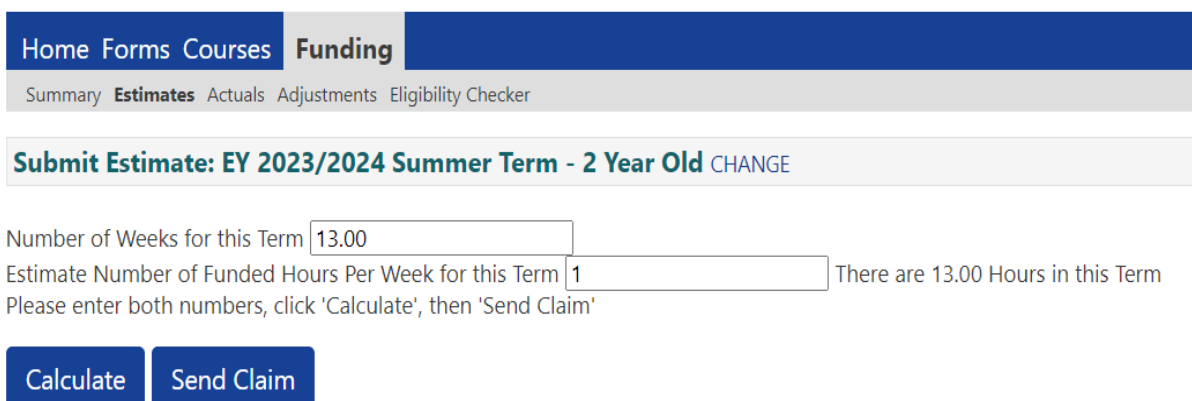
Please enter both numbers, click 'Calculate', then 'Send Claim'

**Calculate** Send Claim

You need to input the number of total estimated hours per week for all your children in the relevant age group.

Next, click on calculate. The portal will then multiply your estimated hours per week by the number of weeks in the term.

If you are happy with the total, then click the Send Claim button,



Home Forms Courses **Funding**

Summary **Estimates** Actuals Adjustments Eligibility Checker

**Submit Estimate: EY 2023/2024 Summer Term - 2 Year Old** [CHANGE](#)

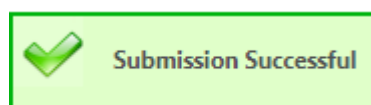
Number of Weeks for this Term

Estimate Number of Funded Hours Per Week for this Term  There are 13.00 Hours in this Term

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

**Calculate** Send Claim

You will see a message in a green box to verify that you have submitted your claim.



You then need to repeat the process for the other age group if applicable.

Providers can submit up to and including the final deadline day which will be communicated to you. The EY Funding Team will process your final submitted hours. Therefore you should always submit the overall total number of hours you require rather than the difference between the hours on your previous submission and current submission.

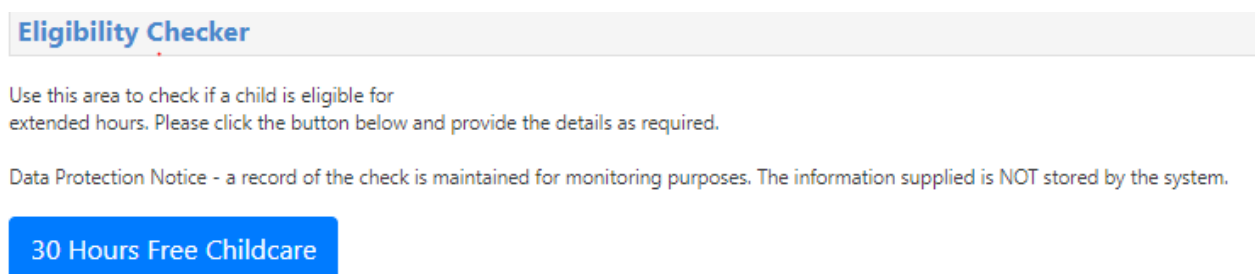
### 4.3 Validate eligibility codes for 30 Hours (“Extended entitlement”)

Before offering places for the extended entitlement, you should validate the 11-digit code that is provided by the parent/carer prior to the new funding period beginning. Providers should be aware that the parents of prospective funded 30-hour children need to apply for the eligibility code up to the end date of the previous funding period to be eligible in the new funding period. For further details please contact [EYFunding@durham.gov.uk](mailto:EYFunding@durham.gov.uk).

To do this, select ‘Eligibility Checker’ from the Funding screen.



Select the “30 hours free Childcare” button



The following screen will appear:-

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 style="width: 80%;" type="text"/>
Child Date of Birth*	<input style="width: 80%;" type="text"/>
Parent/Carer Forename	<input style="width: 80%;" type="text"/>
Parent/Carer Surname	<input style="width: 80%;" type="text"/>
Parent/Carer NI Number*	<input style="width: 80%;" type="text"/>
Consent must be given for this	<input type="checkbox"/> Eligibility Check
Partner Forename	<input style="width: 80%;" type="text"/>
Partner Surname	<input style="width: 80%;" type="text"/>
Partner NI Number	<input style="width: 80%;" type="text"/>

\*denotes mandatory fields

Submit
Cancel

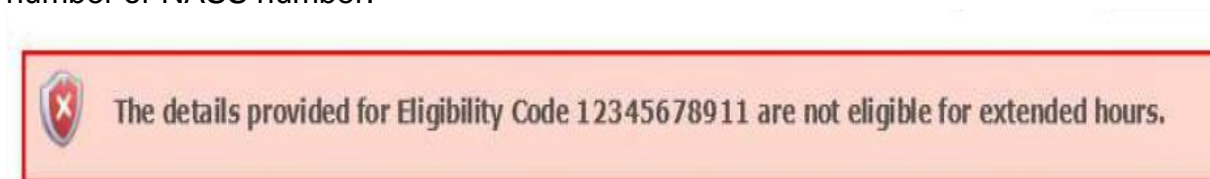
Complete the fields shown using the information the parent has provided (those fields marked \* are mandatory). Please ensure that you also tick the “Eligibility Check box” as this gives consent for an eligibility check to be completed. Then choose the “Submit” button.

If the code is valid, you will see the following message:



In keeping with Data Protection, the eligibility check details are not stored in the system. The information will need to be added to the child’s record in the Actuals tab.


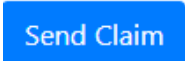
If the code is not valid you will see the following message and you will need to ask the parent/care to check the details, they have provided. The code will only be valid if the 11-digit code is matched against the child’s date of birth, and the parent/carer national insurance number or NASS number.



## 4.4 Actuals

The actuals tab will list funding headcount forms where you can submit information about the children attending your setting. This is listed on a term-by-term basis within a financial year. A green icon next to the term name will indicate that this term is open for submissions. A red icon will indicate that the deadline has passed for actual submissions, or that the term has not yet opened for submissions.

- As with the Estimates, if you have already been paid for the term, you will only have access to view the details.

- You can add child details at any point after the interim payment, once the portal has been opened, up to and including the agreed final submission date. You can access the submission dates on the Home Page of the Provider Portal.
- If you have no changes to the funded children (and their funded hours), then you do not need to send in a claim as you will be paid based on your existing funded children and the hours that they were funded per week in the previous term based on the number of weeks in the current term. The icon  will remain a light blue colour if there are no changes, indicating that you do not save any new detail for this age group for this current term. If you had made changes that need to be submitted the icon would change to a dark blue colour  (see page 23 for details).

[Home](#)
[Forms](#)
[Courses](#)
[Funding](#)

### Durham Provider Portal

The Provider Portal is now open for all Summer Term actual submissions.

Spring Term adjustments can be submitted up to and including June 15th 2023.

[Useful Forms for Early Years Providers including Provider timetable for 2022-23 and Parent Declaration Forms](#)

Details on how Durham County Council collects and shares information can be found in the Durham County Council Privacy Notice

[Privacy Notice:](#)

Simply click on the link available and this will take you to the relevant detail for the current timetable – see below:

## Key Dates 2023-2024

The table below outlines the key dates for this financial year.

### Free Entitlement – 2, 3 & 4-year-old provider payment timetable 2023-24

Period 2023-24	Estimates	Estimate payments (75%)		Headcount / Balance	Adjustment Requests	Balance payments (25%)
	Dates for input of <a href="#">2,3 &amp; 4-year olds</a> by providers	Deadline for payments to be made to Providers		Dates for input of actual data by providers	Dates for Adjustment requests by providers	Deadline for payments to be made to Providers
<b>Summer Funding Period</b> 13 weeks 195 hours (universal) or 390 hours (extended) Between 1 April to 31 August	<b>Monday 27<sup>th</sup> February to Thursday 9<sup>th</sup> March 2023</b>	Date for Termly paid <b>Thurs 6<sup>th</sup> April 2023</b>	Date for Monthly paid <b>Thurs 6<sup>th</sup> April 2023 Friday 5<sup>th</sup> May 2023 Friday 2nd June 2023</b>	<b>Monday 3rd April 2023 to Thursday 15<sup>th</sup> June 2023</b>	<b>Monday 26th June 2023 to Thursday 9<sup>th</sup> November 2023</b>	<b>Friday 7<sup>th</sup> July 2023</b>
<b>Summer qualifying date of birth:</b> <a href="#">2 year olds</a> 01/04/20 to 31/03/21      3&4 year olds 01/04/18 to 31/03/20						
<b>Autumn Funding Period</b> 14 weeks 210 hours (universal) or 420 hours (extended) Between 1 September to 31 December	<b>Monday 3<sup>rd</sup> July to Thursday 10<sup>th</sup> August 2023</b>	Date for Termly paid <b>Friday 1<sup>st</sup> September 2023</b>	Date for Monthly paid <b>Friday 1<sup>st</sup> September 2023 Monday 2nd October 2023 Thursday 2nd November 2023</b>	<b>Friday 1<sup>st</sup> September to Thursday 9<sup>th</sup> November 2023</b>	<b>Monday 20th November to Thursday 18<sup>th</sup> January 2024</b>	<b>Thursday 7<sup>th</sup> December 2023</b>
<b>Autumn qualifying date of birth:</b> <a href="#">2 year olds</a> 01/09/20 to 31/08/21      3&4 year olds 01/09/18 to 31/08/20						
<b>Spring Funding Period</b> 11 weeks 165 hours (universal) or 330 hours (extended) Between 1 January to 31 March	<b>Monday 13<sup>th</sup> November to Thursday 23rd November 2023</b>	Date for Termly paid <b>Friday 15<sup>th</sup> December 2023</b>	Date for Monthly paid <b>Friday 15<sup>th</sup> December 2023 Friday 12<sup>th</sup> January 2024</b>	<b>Thursday 7<sup>th</sup> December to Thursday 18<sup>th</sup> January 2024</b>	<b>Monday 5<sup>th</sup> February to Thursday 13<sup>th</sup> June 2024 (TBC)</b>	<b>Friday 23rd February 2024</b>
<b>Spring qualifying date of birth:</b> <a href="#">2 year olds</a> 01/01/21 to 31/12/21      3&4 year olds 01/01/19 to 31/12/20						

#### 4.4.1 Adding children via “Add Child Button” (incl. EYPP details for 3 & 4 year old funded children)

Click Actuals and select the Term you would like to add children and submit a claim for.

Home Forms Courses **Funding**


Summary Estimates **Actuals** Adjustments Eligibility Checker


Select Year and Term


EY 2023/2024

 Summer Term  
Submission Period:  
03-Apr-2023 to 15-Jun-2023

EY 2022/2023

 Summer Term  
Submission Period:  
01-Apr-2022 to 16-Jun-2022

 Spring Term  
Submission Period:  
08-Dec-2022 to 19-Jan-2023

 Autumn Term  
Submission Period:  
01-Sep-2022 to 10-Nov-2022

EY 2021/2022


Next, select the age group required

Home Forms Courses **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker



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

EY 2023/2024

 Summer Term  
Submission Period:  
03-Apr-2023 to 15-Jun-2023

EY 2022/2023

EY 2021/2022

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

To add a new child select the  button:

Firstly, complete the Child's details tab



Home Forms Courses **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Notes

**Child Details**
Forename\*
Middle Name
Surname\*
DOB\*
Proof of DOB
Gender\*
Preferred Surname
Ethnicity
SEN COP Stage

☐
☐ Male ☐ Female
<Information Not Yet Obtained>
<Unknown>

**Search for an Address**
Primary
Postcode\*
Search

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

Save Cancel

\*denotes mandatory fields

Complete the child details in full, all fields marked with \* must be completed. For the Child's date of birth field, please use the Calendar to select the date of birth to ensure this is in the correct format when your submit your details to us.

- Proof of DOB – this box should be checked to confirm you have seen proof of the child's date of birth.
- To search for the address you need, enter the Postcode in the box and click search, a box will then appear for you to select the address from the drop down list, select your address.

**Search for an Address**
Primary
Postcode\*
Search

Please select an item from the list ...

**Address**
Address Line 1\*
Address Line 2
Address Line 3
Locality
Town
County
Postcode\*
Cancel Enter Manually

Choose the address you need from the drop down list.

**Search for an Address**

Primary

Postcode\*

DH1 5TT

Search

Police Headquarters, Aykley Heads Road, Aykley Heads, Durham, DH1 5T ▼

**Address**

Address Line 1\*

Police Headquarters

Address Line 2

Aykley Heads Road

Address Line 3

Locality

Town

Aykley Heads, Durham

County

Postcode\*

DH1 5TT

Cancel

Enter Manually

Confirm

- If the address you need to enter is not listed on the drop down list, you can then choose to enter the address Manually, select the Enter Manually button.

**Search for an Address**

Primary

Postcode\*

DH1 5TT

Search

Please select an item from the list ... ▼

**Address**

Address Line 1\*

Address Line 2

Address Line 3

Locality

Town

County

Postcode\*

Cancel

Enter Manually

Enter the address details, fields marked with \* are required.

Then select the Confirm Button.

**Search for an Address**

Primary

Postcode\*

DH1 5TT

Search

Police Headquarters, Aykley Heads Road, Aykley Heads, Durham, DH1 5T ▼

**Address**

Address Line 1\*

Address Line 2

Address Line 3

Locality

Town

County

Postcode\*

Police Headquarters

Aykley Heads Road

Aykley Heads, Durham

DH1 5TT

Cancel

Enter Manually

Confirm

This will then populate the Child details tab with the address.

Home Forms Courses Funding

Summary Estimates Actuals Adjustments Eligibility Checker

Child Details Parent / Carer Details Funding Details Notes

**Child Details**

Forename\*

Middle Name

Surname\*

DOB\*

Proof of DOB

Gender\*

Preferred Surname

Ethnicity

SEN COP Stage

☐

☐ Male ☐ Female

<Information Not Yet Obtained>

<Unknown>

Update Address

**Address**

Address Line 1\*

Address Line 2

Address Line 3

Locality

Town

County

Postcode\*

Police Headquarters

Aykley Heads Road

Aykley Heads, Durham

DH1 5TT

Save

Cancel

\*denotes mandatory fields

- Ethnicity – this information needs to be given to the setting by parents or carers of a funded child and then added by the setting. Details of the codes to be used can be found below (they are also available in the appendices of the Parent/Carer Declaration Form). We would encourage all settings to use our Parent/Carer Declaration Form or amend their own registration document to include this detail.

#### Child Ethnicity codes:

<b>Ethnicity Category</b>	<b>Code</b>	<b>Ethnicity Category</b>	<b>Code</b>
White - British	<b>WBRI</b>	Asian or Asian British - Pakistani	<b>APKN</b>
White - Irish	<b>WIRI</b>	Asian or Asian British - Bangladeshi	<b>ABAN</b>
Traveller of Irish Heritage	<b>WIRT</b>	Asian or Asian British - Any other Asian Background	<b>AOTH</b>
Gypsy / Roma	<b>WROM</b>	Black or Black British - Caribbean	<b>BCRB</b>
White - Any Other White Background	<b>WOTH</b>	Black or Black British - African	<b>BAFR</b>
Mixed - White and Black Caribbean	<b>MWBC</b>	Black or Black British - Any Other Black background	<b>BOTH</b>
Mixed - White and Black African	<b>MWBA</b>	Chinese	<b>CHNE</b>
Mixed - White and Asian	<b>MWAS</b>	Any Other Ethnic Group	<b>OOTH</b>
Mixed - Any Other Mixed background	<b>MOTH</b>	Refused	<b>REFU</b>
Asian or Asian British - Indian	<b>AIND</b>	Information Not Yet Obtained	<b>NOBT</b>

- SEN COP:-

#### Maintained and Academy Primary School Nurseries & Maintained Nursery Schools

Please do not update this section, as the information is already gathered through the school census.

#### PVI Settings, Governor Ran Provision & Childminders

This section should only be updated if the child has a SEN Support Plan. If a child has an Education, Health and Care Plan (EHCP) this will be populated by the SEND Placement Team so should not be updated here.

Then select the Parent Carer Details Tab

Home Forms Courses **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

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.

<p><b>Parent / Carer Details</b></p> <p>Forename <input type="text"/></p> <p>Surname <input type="text"/></p> <p>DOB <input type="text"/></p> <p><input type="checkbox"/> NI or <input type="checkbox"/> NASS Number <input type="text"/></p> <p>Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input type="checkbox"/> 30H</p>	<p><b>Partner Details</b></p> <p>Forename <input type="text"/></p> <p>Surname <input type="text"/></p> <p>DOB <input type="text"/></p> <p><input type="checkbox"/> NI or <input type="checkbox"/> NASS Number <input type="text"/></p> <p>Tick to give consent to Eligibility Checking for <input type="checkbox"/> EYPP <input type="checkbox"/> 30H</p>
--	---

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

## Parent/Carer Details Tab

Complete these sections highlighted above in full if you want to check whether a child is eligible for the Early Years Pupil Premium, (3&4 year olds only). The detail required is the Parent/Carer First name and surname, Date of Birth and either a National Insurance Number or a National Asylum Support Service Number. Please ensure you complete all of the necessary detail if you require an eligibility check to be done for EYPP. You also need to indicate parental consent for a check to be completed (see page 20).

Tick to give consent to Eligibility Checking for ☒ EYPP ☐ 30H

### Consent for EYPP:

The NI or NASS Number and DOB will also be required for this data to be used for an Eligibility Check.

When you tick the consent for EYPP as shown above the red box above will be shown if the required information has not been completed and provided on the record.

Without all of these details we will not be able to do the necessary check for EYPP and the resulting search will come back as “not found” and you may not qualify for funding that you are entitled to.

From the detail supplied in this section, a batch check will be completed by DCC and confirmation of EYPP will be verified at this stage both for your new starters for this term, and also those children still attending who were eligible from the last term. Qualifying EYPP children are also entitled to receive a Household Support Grant so it is vitally important that you collect as much detail for the Parent/Carer as possible and also consent for DCC to do the EYPP check.

The Parent/Carer Details Tab should also be completed in respect of those 3 & 4 year old children in receipt of an 11-digit code, and are therefore eligible for a funded 30 hour place ("The Extended Entitlement").

Please ensure that if you have completed the Parent/Carer detail, that consent is given to do eligibility checks for EYPP and the 30 hour Extended Entitlement by ticking the boxes below:-

For EYPP

Tick to give consent to Eligibility Checking for ☒ EYPP ☐ 30H

For 30 hours Extended Entitlement

Tick to give consent to Eligibility Checking for ☐ EYPP ☒ 30H

Notes Tab

The screenshot shows the 'Funding' tab selected in the top navigation bar. Below it, the 'Actuals' sub-tab is active. In the main content area, the 'Notes' sub-tab is selected, showing a large text input field with the placeholder 'Add a new note'. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that '\*denotes mandatory fields'.

A notes tab is available for your use and anything typed in here can be seen by the Early Years Funding Team. We ask that you ONLY use the Notes tab in the following instances:

- For two year old children where the parent/carers has presented a Golden Ticket please enter the Golden Ticket number in the notes tab.
- For two year old children where the parent/carers has presented an EY Voucher number, this can be entered on the EY claim section in the 2 year olds Actuals when adding your child. An EY voucher code, the Child's date of birth and Child's surname are to be entered in the relevant fields.

- Where a child is split funded, please enter the details of the other provider that the child also attends.
- Where a child joins after the first day of term and/or leaves before headcount day, please enter the start or leaving date in the notes tab.
- You can request an eligibility check to be completed for Early Years Pupil Premium (EYPP). This can be done as long as you have completed the Parent/Carer tab with a National Insurance or National Asylum Support Service number and the Parent's date of birth.
- Where a child is eligible for EYPP for a non-economic reason in respect of Looked After Children/ Adopted Children:
  - They are looked after by a Local Authority in England or Wales or
  - They have left care in England or Wales through:-
    - An Adoption order
    - A Special guardianship order
    - A Child Arrangements order

(PLEASE RETAIN ALL DOCUMENTATION FOR THESE CATEGORIES FOR AUDIT PURPOSES).

Next, select the **Funding Details** tab

The screenshot shows a web-based form for entering funding details. The top navigation bar includes 'Home', 'Forms', 'Courses', and 'Funding' (which is highlighted). Below this is a sub-navigation bar with 'Summary', 'Estimates', 'Actuals' (highlighted), 'Adjustments', and 'Eligibility Checker'. The main form has tabs for 'Child Details', 'Parent / Carer Details', 'Funding Details' (highlighted), and 'Notes'. The 'Funding Details' section contains fields for 'Start Date\*', 'End Date\*', and 'Weeks Attended in Term\*', along with a 'Default Term Dates' button. There are also checkboxes for 'Present during Census', 'Attends Two Days or More', and 'Nominated for DAF\*'. The 'Attendance Days' section lists days of the week with 'Yes'/'No' radio buttons. The 'Universal Funded Hours per Week' section has a 'Universal Hours\*' field. The 'Extended Funded Hours per Week' section has an 'Extended Hours\*' field and a '30H Eligibility Code' field, with a '30 Hours Free Childcare' button. The 'Total Funded Hours per Week' section has a 'Total Funded:' field. The 'Non-Funded Hours per Week' section has a 'Non-Funded Hours\*' field and a note about other settings. A red box highlights the 'Maximum Values Allowed' section, which lists limits for weeks, hours, and terms. At the bottom are 'Save' and 'Cancel' buttons and a note that asterisks denote mandatory fields.

**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

**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

**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:

**Non-Funded Hours per Week**

Non-Funded Hours\*

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

**Maximum Values Allowed:**

Number of Weeks: **13.00**

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

- Click the Default Term Dates button to automatically populate the start and end dates. These dates should not be amended if your child attends all term. If the child starts later or finishes earlier in the term please enter the Start Date and End Date.
- Where the child is present during the January term (Spring) and January is within the current term, tick the "Present during Census" box



- Tick the attends two days or more box if the child attends for more than 10 hours per week (maximum hours allowed in one day is 10).

To assist you with this, you will see a red box which displays the maximum hours per week you can claim for if this box is ticked or unticked as per the examples below:-

Attends Two Days or More



Maximum Values Allowed:	
Number of Weeks:	13.00
Universal Weekly Hours:	15
Universal Termly Hours:	195
Universal Yearly Hours:	570
Extended Weekly Hours:	15
Extended Termly Hours:	390
Extended Yearly Hours:	570

Attends Two Days or More



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

If the child is eligible for Disability Access Funding (DAF). eg receives Disability Living Allowance and the parent/carer has nominated your setting to receive the funding select 'yes', otherwise select 'no'. You should have witnessed any evidence for any claims for DAF and a copy of this should be forwarded to: EYFunding@durham.gov.uk

- Enter the number of Universal funded hours the child is attending at your setting.
- Enter the number of Non-Funded hours the child is attending at your setting (these are additional hours purchased by the Parent/Carer).
- Enter the number of Extended funded hours the child is attending at your setting **and** the associated 30 Hours 11 digit eligibility code (use the Eligibility Checker on the Funding tab to validate the code before entering child details)
- Then click on the 30 Hours Blue Free Childcare Box and this will process the eligibility confirmation at the top of the screen (green box). Please be aware that this detail is now recorded against the child's record at this point. When the eligibility is confirmed the little box Eligible for 30H will show a tick as below.

Eligible for 30H



- Save the details. This will take you back to the page with a list of all the funded children for that particular age group and term

Home Forms Courses **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker

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

Not submitted In 30H grace period

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		195.00	0.00	£883.35	EYPP	
✖	Unchanged		195.00	0.00	£780.00		
⚠	↻ Edit Pending		195.00	195.00	£1560.00		25-Mar-2019 - 14-Jul-2019 Grace Period: 31-Dec-2019
✖	Unchanged		195.00	0.00	£780.00		
✖	Unchanged		195.00	0.00	£883.35	EYPP	
✖	Unchanged		195.00	0.00	£883.35	EYPP	
⚠	↻ Edit Pending		195.00	195.00	£1560.00		08-Nov-2017 - 07-May-2019 Grace Period: 31-Aug-2019

- Once you have completed this for all your children select

Send Claim

 Submission Successful

You will then get the following message and the status of any amended or new children's records will change to

↻ Add Pending, Submitted

This status will change when the EY Funding Team have imported and processed the child's record.

For anything not listed above please send an email to [EYFunding@durham.gov.uk](mailto:EYFunding@durham.gov.uk)

#### 4.4.2 Adding children via “Enter EY Voucher” Button (2 year olds only)



Where a voucher code is available (6-digit code), click the Enter EY Voucher button and the screen below will be displayed.


A screenshot of a web form titled 'EY Claim' in a blue header bar. Below the header, the text 'Please enter a valid Voucher Code, together with the Child's Date of Birth and Surname.' is displayed. There are three input fields: 'Voucher Code\*' (a single-line text box), 'Child Date of Birth\*' (a date picker), and 'Child Surname\*' (a single-line text box). Below these fields is a note '\*denotes mandatory fields'. At the bottom of the form are two blue buttons: 'Submit' and 'Cancel'.

- Type in the voucher code, child's date of birth and surname
- Click Submit

Once this has been submitted, the Child Details screen will be displayed, the same as when you are adding a child, with any known information automatically completed as this was saved when the parent/carers made their initial application on the DCC Parent Portal. You can then complete any further information that you have along with the funding detail, add the EY voucher code in the Notes tab too and then click Save.

#### 4.4.3 Editing/deleting children from a claim

You can change any child details before the final headcount submission date, this includes addresses and attendance dates/hours. Please remember to submit your claim again if any changes have been made.

- From the Funding Tab, select Actuals - the children will be displayed as before.
- Select the child you wish to edit the detail for
- Select Edit
- Make the relevant changes/updates and click Save.
- To delete a child from the headcount, go to the  icon on the left of the child's name on the summary list. A Request Delete message should show. Next, click Delete, (a warning message will be displayed to ensure you have not clicked this in error). Finally, click Yes.

- Please note: if you delete a child, it will only be deleted from the current term only, but their details will remain in previous terms.

#### 4.4.4 Starters and Leavers Prior to Headcount Date

Where a child starts or leaves prior to the headcount date, the child's details must also be added to the system with the number of weeks attended adjusted accordingly.

A note must be added to the 'Notes' tab showing the relevant start or end date of the child so the number of weeks can be checked by the Early Years Funding team.

Where pupils start or leave after the headcount date, a Pupil Adjustment would need to be completed and submitted via the portal. When a pupil leaves after the headcount date, and an adjustment has been submitted, this child will also need to be deleted from the following terms Headcount when the Actuals open. The same would be required if a new starter is funded via an adjustment, as they would need adding to the following terms Headcount when the Actuals open. For details on how to submit adjustments please refer to section 4.6 below.

#### 4.4.5 Submitting a claim

Once all children have been entered, they will be listed for term in the actuals tab. The child status will be listed as Add Pending prior to the claim being submitted.

To submit the claim, click the  button. This can be done as many times as necessary up until the final deadline date.

Once the claim has been submitted the child status will change to Add Pending Submitted and there will be a message indicating that your submission was successful.

#### 4.5 Early Years Pupil Premium (EYPP) checking

Once you have submitted your 3 & 4 year old headcount and the funding has been processed, you will be able to see which children are eligible for EYPP funding.

- Go back to your list of children by clicking on Funding and Actuals.
- In the Child Weightings column EYPP will be listed for eligible children.

Child Weightings Tab	Last ECS tab	Meaning
Blank	Blank	Child has not been checked
EYPP	Not Blank	Child has been checked and is eligible
Blank	Not Blank	Child has been checked and is not eligible
EYPP	Blank	Child has not been checked but is eligible under discretionary criteria

## 4.6 Adjustments

Funding adjustments should only be submitted after the headcount period is closed. Please refer to the Early Years Funding Timetable which can be accessed on the Provider Portal Home Page. Payment adjustments or funding deductions will be made against the next payment(s) due to providers. Adjustments are now completed in a similar process in which you would have submitted your actual claims (as described above in section 4.4).

### 4.6.1 Submitting adjustments

- Details of any late starters after you have submitted your actual headcount claim are submitted using the Pupil Adjustment tab.
- Details of any leavers after you have submitted your actual headcount are submitted using the Pupil Adjustment tab.
- Details of children changing their funded hours (both Universal hours and Extended Entitlement) after you have submitted your actual headcount claim are submitted using the Pupil Adjustment tab.

The Adjustment tab can be accessed by selecting FUNDING, then ADJUSTMENTS





Next, select the age group for the term for which you wish to make an adjustment for.

You will see a list of your existing funded children in that age group and term for whom you submitted an actual claim as below:-

[Home](#) [Forms](#) [Courses](#) **Funding**

[Summary](#) [Estimates](#) [Actuals](#) **Adjustments** [Eligibility Checker](#)

 Parent/Carer details must be completed and the Eligibility code added in the Notes tab.

**Submit Adjustments: EY 2022/2023 Spring Term - 3/4 Year Old** [CHANGE](#) 

**► Paid as Adjustments** - Total: £4962.64, Paid Date: 20-Feb-2023

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

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

## NEW STARTERS

If you are processing a new starter then click on the Add Child button and complete the tabs as described in adding Actual children in section 4.4.1

You need to inform the EY Funding team of the number of overall funded hours that you wish to claim for in respect of this child for the remainder of the term and NOT funded hours per week.

Please complete the child details tab and parent/carer details tab as per the detail in section 4.4.1 above.

When you have to add details on the FUNDING DETAILS tab you will only be able to enter the term dates by clicking on the Default Term Dates tab and manually amend the start date and/or end date to suit your requirements. You will not be able to add any funding information as this should be included in the Pending adjustment tab. However, you will still be required to indicate any DAF qualification, indicate whether the child attends two days or more and input the 11 digit code for Extended Entitlement hours eligibility and complete an eligibility check by clicking the 30 Free Hours Childcare blue box.

Next, choose the Pending Adjustment tab. For any new starters please enter the hours you wish to claim for the remainder of the term as per the screen below. You should differentiate between Universal hours and Extended Entitlement hours in the claim and put in a brief description to validate your adjustment request.

Home Forms Courses **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name:

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

**Universal Pending Adjustment**

Number of Hours 

More Hours ▼

105

Reason (500 characters)

Maximum Values Allowed:

Universal Termly Hours: **165**

Universal Yearly Hours: **570**

**Extended Pending Adjustment**

Number of Hours 

More Hours ▼

105

Reason (500 characters)

Maximum Values Allowed:

Extended Termly Hours: **330**


Extended Yearly Hours: **570**


Save Cancel

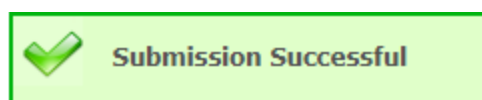
\*denotes mandatory fields

There is also a NOTES tab available to include any additional information (such as a request to complete a check for EYPP providing you have submitted all of the necessary detail in order for an eligibility check to be completed) in regards to your funding adjustment.

To complete the process for this child, click on the blue Save button. This will take you back to the list of children for the term and age group and you will see the child you have added

with a  icon. Complete the process above for any other new starters you wish to claim for.

Once you have completed all of your adjustments click on the  button and you will get the following message to confirm your claim.



Please be aware that for any new starters that you add as an adjustment, they will need to be added as an ACTUAL too on the next term's headcount process.

## LEAVERS


For any existing funded children who have left (and for whom you have received funding as part of your actual headcount claim), you should follow the same process by searching for them in the adjustment tab for the term and age group combination required. As they are an existing funded child in this term, then they will be present in the list of funded children (below).


You need to inform the EY Funding team of the number of funded hours that have been overfunded in respect of this child for the remainder of the term and NOT funded hours per week.



	Status	Child Name	Pending Universal Adj Hours	Pending Extended Adj Hours	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Eligibility Status
	Unchanged		0.00	0.00	165.00	0.00	£747.45	
	Unchanged		0.00	0.00	165.00	0.00	£660.00	
	Unchanged		0.00	0.00	165.00	0.00	£660.00	
	Unchanged		0.00	0.00	165.00	0.00	£747.45	



Please **DO NOT** click on the  next to the child's name as this will remove that child from this adjustment headcount which you are processing.

Please be aware of the message from that appears when you click on the  icon at the top of the page before processing any leavers.

Please do not delete any records from this adjustment headcount detail. You should add any additional hours or reduce any funded hours by using the Pending Adjustments tab within the child's record you are updating. Please contact [EYFunding@durham.gov.uk](mailto:EYFunding@durham.gov.uk) for any additional information

Next, click on the child that has left your setting. You will be directed straight to the Pending Adjustment tab.

For any leavers please enter the hours you wish to return for the remainder of the term as per the screen below.

You should differentiate between Universal hours and Extended Entitlement hours in the claim and put in a brief description to validate your adjustment request.

Home Forms Courses **Funding**

Summary Estimates Actuals **Adjustments** Eligibility Checker

Name:

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

**Universal Pending Adjustment**  
Number of Hours 

Less Hours ▾

105

  
Reason (500 characters)  
Child left on October 21st 7 weeks to return \* 15 hours per week  
  
**Maximum Values Allowed:**  
Universal Termly Hours: **165**  
Universal Yearly Hours: **570**

**Extended Pending Adjustment**  
Number of Hours 

Less Hours ▾



105

  
Reason (500 characters)  
Child left on October 21st 7 weeks to return \* 15 hours per week  
  
**Maximum Values Allowed:**  
Extended Termly Hours: **330**  
Extended Yearly Hours: **570**

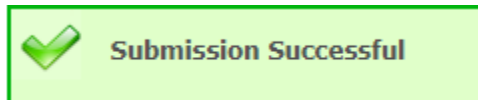
Save Cancel

\*denotes mandatory fields



To complete the process for this child, click on the **Save** button. This will take you back to the list of children for the term and age group and you will see the child you have added the adjustment for with a   **Add Pending** icon. Complete the process above for any other leavers you wish to amend the hours claimed for.

Once you have completed all of your adjustments click on the **Send Claim** button and you will get the following message to confirm your claim.

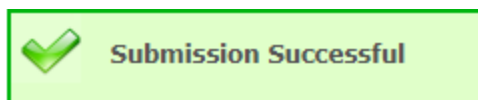


#### CHANGE OF HOURS ATTENDED

The funded hours of a qualifying child can also be amended by submitting an adjustment.

Follow the procedure above to select the child. You will be directed straight to the Pending Adjustment tab. You then select More Hours or Less Hours and input the number of hours you wish to claim or refund along with a description to enhance your submission.

Once you have completed all of your adjustments click on the blue Send Claim button and you will get the following message to confirm your claim.



These adjustments will then be processed and either an adjustment payment will be made to you or a recovery from your next payment(s) will be made.

## 4.6.2 Viewing your submitted adjustments

You are able to view a summary of your submitted adjustments for each term and age group. This summary is divided into sections, with those adjustments still waiting to be processed and paid, and those that have been processed and paid as per the screen below:-

[Home](#) [Forms](#) [Courses](#) **Funding**

[Summary](#) [Estimates](#) [Actuals](#) **Adjustments** [Eligibility Checker](#)

 Parent/Carer details must be completed and the Eligibility code added in the Notes tab.

**Submit Adjustments: EY 2022/2023 Spring Term - 3/4 Year Old** [CHANGE](#) 

 **Not Paid** - Total: £2745.60

 **Paid with Actuals** - Total: £800.00, Paid Date: 16-Feb-2023

 **Paid as Adjustments** - Total: £499.20, Paid Date: 10-Mar-2023

You can click on the arrow next to each status to expand the detail, this will show which child the adjustment is for and the amount.

**Early Years Funding Team  
Durham County Council  
County Hall  
Durham  
DH1 5UE**

Email: [EYfunding@durham.gov.uk](mailto:EYfunding@durham.gov.uk)  
Tel: 03000 262 789

Please ask us if you would like this document summarised in another language or format.



Braille



Audio



Large print

**[EYfunding@durham.gov.uk](mailto:EYfunding@durham.gov.uk)  
03000 262 789**

47538 RFS