The Provider Portal for Free Early Education and Care Funding

A Guide for schools offering 3 and 4 year old Extended Entitlement (30 hours) and 2 year old funding

May 2019
Contents

Section
A. Logging in and changing your password
B. Warning message and reminders
C. Forms
D. Funding Headcount Navigation
E. Estimate claims (academies only)
F. Claiming for Extended Entitlement (30 hours)
G. Grace Periods (30 hours)
H. Submitting claims using 2 year old voucher codes
I. Termly Funding Confirmation process
J. Viewing Payment Summary and Adjustments
K. Sufficiency Data Collection

The information in this guide is relevant to schools with a designated nursery (i.e. children are pupils of the school and recorded on the School Census) offering the 3&4 year old Extended Entitlement (30 hours) and 2 year old funding.

Schools with a ‘Governor run nursery’ provision (i.e. children are not recorded as pupils of the school and are therefore recorded on the Early Years Census) should use the Provider Portal Guide for Private, Voluntary and Independent Providers.
A. Provider Portal - logging in and changing your password

The web address for the Portal is: https://educationandchildcare.kirklees.gov.uk/SynergyWebsite_Live/

Click on ‘Sign In’ at the top right hand corner of the screen.

The following screens will then display for you to enter your e-mail address or user name and then your password. Your school can have several different users set up to use the portal providing each user has their own individual e-mail address. Please contact the FEEC Team to set up new users.

Please note that if you have a Kirklees Parent Portal account and use your email address to sign in to the Parent Portal, then you will not be able to sign in to the Provider Portal with the same email address. You will need to sign in with your Provider Portal username instead.
Please note passwords are case sensitive; however user names are not.

Once logged in you will see the screen below; to access the ‘Provider Portal’ click on Modules in the top left hand corner and select Childcare/Service Provider from the drop down list.

The Home page will then be displayed:

Forgotten Passwords: Your password can be reset from the Password Sign In screen by clicking on ‘Forgot Password’. The following screen will display:
Enter your User Name and click ‘Request Token’. You will receive an email to your registered e-mail address with a token to reset your password.

Copy and paste the token into the ‘Token’ field, making sure that all characters are selected, before selecting ‘Reset Password’. Enter your new password in the ‘New Password’ and ‘Confirm Password’ fields and click ‘Change Password’.

**Password standards:** Passwords **must** be a minimum of 8 characters, use at least one alphabetic character, contain a number, contain an uppercase character, cannot be the same as your user name and cannot be a previously used password.
Locked Account: If you try to login with an incorrect password three or more times, your account will be locked; please contact the FEEC Team who will unlock your account. Then click on ‘Forgot Password’ to reset your password.

Changing your password: – Click on your provider initials at the top right hand corner of the screen; this would be the ‘SN’ in the example below and select ‘Account Management’ from the drop down list.

Select ‘Change Password’

Enter your current password and select ‘Next’. Enter your new password, confirm your new password and select ‘Change Password’.

Important: The Provider Portal contains personal data about children and their parents/guardians. Do not write down log in details and ensure you always log off when you have finished working. If a staff member who knows the log in details leaves your provider, you must change the password.
B. Warning messages and reminders

1. Important reminders and information will be displayed on the Portal Home screen.

2. You may see a message warning that ‘There are unsubmitted child funding records for provider’. This means you have added a new child or made an amendment to your claim but have not submitted it to the FEEC Team.

3. Warning message for current term: double click on message and Send Claim

4. Claims cannot be submitted if they relate to past paid terms. You can view the record by double clicking on the message; the child record which was not submitted will be depicted with .
C. Forms library

a) **Termly Funding Confirmation Forms** – used to confirm total termly hours and the number of children accessing the Extended Entitlement (30 hours). Schools with funded two year old’s also use the 2 year old version.

b) **Notification of Child Leaving a Funded Place** - submit when a child accessing Extended Entitlement (30 hours) or 2 year old funding leaves during the funded period (before the end of term).

c) **Child Starting After Census** – use to claim funding for children starting after census date. This form is published after census day each term and is available until 10 working days before the end of term (the final date late claims/starters can be accepted).

d) **Child Increasing/Decreasing Hours Form** – use if a child accessing a funded place increases or decreases funded hours during the term.

e) **Application to Transfer FEEC Place** – when a Parent Agreement is in place, providers can claim 20 provider working days’ notice for leavers. If children meet ‘very exceptional circumstances’, the new provider can apply for funding during the notice period. Please phone the FEEC Team for advice before submitting this form.

f) **30 Hours** - gathers information about how schools offer the Extended Entitlement.

g) **New Bank Details Form** - to provide/change bank details for funding payments (relevant to academies only).

h) **The Kirklees Agreement - PVI and Academies** – relevant to Academies only. Submission of this form confirms acceptance of the terms and conditions required for inclusion in the Kirklees List of Approved Early Education and Care Providers.

Note: some forms are only available on the portal at certain times of the year or term to help prevent the wrong or unnecessary form being used.
How to access and submit Forms

1. Select ‘Forms’.
2. Click on the relevant form to open.

3. Please fully complete the form; some forms have multiple pages and you will need to click on Next Page. Some forms have mandatory fields that will not allow the form to be submitted unless these are filled.

4. Once the form is fully complete, click on Submit Form.

5. You should see a green submission successful message.
6. Submitted forms are checked regularly. We will contact schools with queries or a response/decision if applicable as soon as possible.

7. Once your form has been processed you will receive an e-mail. If you do not receive an e-mail within 5 working days please contact the FEEC Team to confirm we have received your form.

8. You can view previously submitted forms by selecting ‘View Forms’
D. Funding Headcount Navigation

1. Select ‘Funding’
2. Select ‘Summary’
3. **Select Year and Term**

   ![Select Year and Term](image)

4. Please select the relevant funding age group by clicking on 2 Year Olds or 3 & 4 Year Olds

   ![Summary Head Count Records for 2019/20 - Spring](image)


6. To change to a different term select **CHANGE**
E. Estimate claims [relevant to academies only]

Note: Estimates are optional and applies to academies only. Please refer to the ‘Calendar claims deadlines and payments’ document on our website https://www.kirklees.gov.uk/beta/working-with-children/free-early-education-funding-documents.aspx for deadline dates.

1. Select ‘Funding’
2. Select ‘Estimates’
3. Click on the relevant year and term.
4. You will see the ‘Submission Period’ dates, these are the dates during which you can submit or update your estimate for that term.

5. Click on the 🔄 icon to open the term.

6. If you see the following icon 🛑 the submission dates for that term are closed.

7. 2 year old and 3 & 4 year old estimates are submitted separately. Please select the relevant funding age group by clicking on 2 Year Olds or 3 & 4 Year Olds.

8. Input the number of weeks as 12 weeks in Spring and Summer and 14 weeks in Autumn term.

9. Input estimated weekly funded hours and click Calculate. The total number of hours for the term will be calculated for you.
10. Select **Send Claim** and you should see a ‘Submission Successful’ message.

![Submission Successful](image)

**Notes:**

- If your estimated hours change after your original submission, you can resubmit your estimate up until the estimate deadline date.
- The estimate payment made on the first day of term is 40%.
- The second estimate payment of 40% will be paid in week 5 or 6 (depending on the term). You do not need to submit another estimate unless your estimate figure has increased or decreased.
- If you are submitting an updated estimate **after** the first payment please submit the total new figure; for example if you submitted your original estimate as 150 weekly hours and have two new children claiming 15 hours each - submit your revised estimate as 180 weekly hours rather than just submitting the additional 30 hours.
- If you missed the first estimate deadline and did not receive a payment then providing you submit an estimate by the estimate update deadline 80% will be paid on the second payment.
1. Select ‘Funding’
2. Select ‘Actuals’
3. Click on the relevant year and term.
4. You will see the ‘Submission Period’ these are the dates during which you can submit your actual claim for that term.

5. Click on the icon to open the term.
6. If you see the following icon the submission dates for that term have closed.
7. 2 year old and 3 & 4 year old claims are submitted separately. Please select the relevant funding age group by clicking on 2 Year Olds or 3 & 4 Year Olds.

8. Children from the previous term will be carried forward to the new term unless they are now legal school age. If your school offers funded places for 2 year olds then these children are automatically transferred to the 3&4 year old claim.
Adding children to your claim

1. Select Add Child, the screen will open to ‘Child Details’ tab.

   Data quality is vital; you must take and use a copy of the birth certificate or passport to ensure the full legal name (including middle names) and date of birth is entered correctly.

2. Complete the Child Details section. All fields marked with * are mandatory. Enter child’s name exactly as shown on the birth certificate or passport and include all middle names.

3. DOB format is DD/MM/YYYY or DD-MM-YYYY or use the calendar. The record will fail if you enter as 30032016.

4. In address line 1 enter house number or house name & street name. Enter town in town line & postcode in postcode line, a space must be entered in the middle of the postcode (ignore Locality & County).

5. Select Ethnicity and ‘SEN COP Stage’; these are mandatory fields. SEN can be one of the following three options ‘No Special Education Need’, ‘SEN Support’ or ’EHC Plan’.

6. Go to ‘Parent/Carer Details’ and enter parent name and National Insurance number from the ’30 Hours Eligibility Consent Form’ available on the Provider Website Select ‘Tick to give consent to Eligibility Checking’ for 30H. Second parent (partner) data is optional. Note: parent date of birth is not required to check 30 hours eligibility but should be entered on Integris to apply for EYPP.
7. Select the 'Funding Details' tab

8. Term dates are automatically populated by clicking Default Term Dates.

   Note: change term dates for children starting after census day or for children leaving during the term. The FEEC Team will also amend term dates based on information submitted on 'Notification of Child Leaving a Funded Place' forms.

9. Enter number of 'Weeks Attended in Term'. This will be 12 weeks in Summer/Spring terms and 14 weeks in Autumn. If you are claiming part of a term for leavers or late starters then input the exact number of weeks (including the notice period for leavers).

10. 'Present during Census' box should not be ticked as school census information is obtained via Integris or SIMS.

11. 'Attends Two Days or More': it is not possible to claim more than 10 funded hours per day so if a child is accessing more than 10 hours (over two days or more) please tick this box. If you have not ticked 'Attends Two Days or More' the
`Maximum Values Allowed` table will display with the maximum hours based on a child attending one day i.e. a maximum of 10 hours per week.

12. For children in receipt of Disability Living Allowance parents can nominate a provider to receive a £615 annual payment. Schools do not currently apply for DAF using the Provider Portal therefore please select ‘No’ for `Nominated for DAF`. For further information about DAF eligibility and the school application process please see Provider Website.

13. Schools are not currently registered to offer stretched places so please do not tick the ‘Stretching Entitlement’ box. If your school would like to offer stretched (funded places in the school holidays) then please contact the FEEC Team.

14. ‘Universal Hours’ are funded via the school census; because a value has to be entered please enter 0 (zero) hours.

15. Enter the ‘30H Eligibility Code’ and click 30 Hours Free Childcare to perform the eligibility check (you must also add the parent/carer details before this check can be performed).

Eligible children:

Children not eligible for the current term:

Although child has an eligible code the Extended Entitlement cannot be claimed this term. This could be because the voucher was issued too late to claim for the term or the child is already in the Grace Period, a child must already be accessing the Extended Entitlement to qualify for the Grace Period.
Children who are not eligible:

If you enter an invalid code or the parent is not eligible for 30 hours you will see the message above on screen. Check the details entered are correct or try entering the second parent details if you have them. Data accuracy is vital therefore please double check details are correct with the parents before contacting the FEEC Team.

16. Enter ‘Extended Hours’ per week up to a maximum of 15 hours. **Important:** Include all hours on Integris or SIMS, both Universal and Extended.

17. Enter ‘Non-Funded’ hours per week (number of hours paid for by the parent if any). If no non-funded hours are taken, enter zero (0) as there must be a value in this field.

18. Tick which days of the week child attends in ‘Attendance Days’

19. Click on **Save**

20. Status will change to ‘Add Pending’.
21. Repeat process for all new children.

22. Select **Send Claim**

23. Child status will change to `Add Pending Submitted`.

24. **Unsubmitted records**: If you see a red exclamation mark icon at the side of the child’s name and the Status is `Add Pending` this means you have not yet pressed **Send Claim** and is a warning that the record has not been submitted to the FEEC Team. Unsubmitted records can result in an incorrect payment.

25. When the FEEC Team have imported the records the child’s status will show as `Unchanged`.
Amending children

1. To amend a child’s record double click on the child’s name.

2. The screen will open the ‘Summary’ tab which provides details of the funding and payment details for that child.

3. Click on ‘Child Details’ to check child name and address are correct.

4. Select ‘Parent/Carer Details’ tab and enter the parent name[s] and National Insurance number[s] from the ’30 Hours Eligibility Check Consent Form’ available on the Provider Website. Select ‘Tick to give consent to Eligibility Checking’ for 30 hours. Second parent (partner) data is optional. Note: parent date of birth is not required to check 30 hours eligibility but should be entered on Integris if applying for EYPP.
5. Select ‘Funding Details’ tab to review and amend the child’s funding details.

6. Enter the voucher code in the ‘30H Eligibility Code’ box and click on 30 Hours Free Childcare to run the eligibility check (you need to add the parent/carer details before this check can be performed).

7. You will see a message on screen confirming whether or not the child is eligible to the Extended Entitlement.

8. Click on Save.

9. Child status will change to ‘Edit Pending’. You will see there is a red exclamation mark icon at the side of the child’s name - this means you have not yet pressed Send Claim and is a warning that the record has not been submitted to the FEEC Team. Unsubmitted records can result in an incorrect payment.
10. To cancel amendments at the pending stage click on the icon next to the child’s name and click 'Yes' to confirm you are ‘Sure you want to undo your pending changes’.

11. Click on Send Claim

12. After sending the claim the child status will change to ’Edit Pending, Submitted’. The Send Claim button will now be unavailable; if you make more amendments to your claim it will become available again.

13. When the FEEC Team have imported the record the child’s status will show as ‘Unchanged’.

14. You can continue to make amendments up until the termly deadline.
Deleting children from your claim

1. Click on the icon next to the child’s name to delete the child from your claim.

2. Select Yes to delete the child

3. Status will change to ‘Delete Pending, Submitted’.

4. If you have deleted a child in error this can be cancelled by clicking next to the child’s name and confirming you are sure you want to cancel the deletion.

5. When the FEEC Team have processed the delete, the child will no longer be visible. If you later realise you have deleted a child in error you will need to add back as a new child using the ‘Add Child’ button.
Adding Child Notes

1. You can enter notes when adding or editing a child record on your claim.
2. Click on the 'Notes' tab in the child record and type your notes into 'Add a new note' field.

Notes should be added in the following circumstances:

- Children starting after census date.
- If you have amended the child’s core details e.g. name or date of birth.
- If child has changed address.
- Children leaving the Extended Entitlement or 2 year old funded place during the term.
- Children whose funding is split with another provider and therefore your school is not claiming for the full term.
30 Hours Eligibility Checker

You can use the Eligibility Checker to check a child is eligible to 30 hours before offering a place, (please note: the validity end date of the code could be before the start of the next term, therefore parents will need to re-confirm their eligibility with HMRC). The Eligibility Checker does not save the data and you will need to re-enter the information on the 'actual' claim; therefore you may prefer to add the child directly to your claim if the term is available, and perform the eligibility check there.

1. To perform an eligibility check click on 30 Hours Free Childcare

2. Enter the parent/child data collected on the '30 Hours Eligibility Consent Form' available on the Provider Website. Second parent/partner data is optional.

3. Click on Submit - the Portal will check the eligibility of the voucher code and display a response with the 'Validity Start date', 'End date' and 'Grace Period end date'. Please see section on adding new children for example messages.
G. Grace Periods (30 Hours)

All Eligibility codes for 30 Hours are issued with a Grace Period End Date. The Grace Period enables parents to retain funding up to the end of the Grace Period should they become ineligible for 30 hours.

1. All children currently eligible to 30 hours will have a Grace Period End Date displayed. 30 hours funding will cease if the parent has not reconfirmed their eligibility with HMRC or if parent circumstances have changed and they are no longer eligible to 30 hours.

2. The council will perform at least six eligibility rechecks each year. Once the recheck has taken place we will notify providers by e-mail and ask you to log onto the Portal to see which children are in the Grace Period and what date their Grace Period (Extended hours funding) ends.

3. Children who are in the Grace Period will be identified by the warning icon next to their name. In the example below ‘Stacey Starfish’ is in the Grace Period as the validity end date (displayed in the ‘Eligibility Status’ column) has passed - the first date displayed is the validity start date; the second date is the validity end date.

   ![Image of a warning icon next to a name]

**Note:** If the parent has reconfirmed their eligibility with HMRC the validity date will update when either the provider or the FEEC Team performs an eligibility check. To view when the last check was performed, click on the child’s name, on the summary tab the ‘30H Eligibility last checked’ date will be shown.

![Image of a warning icon next to a name]
4. If a child has the Grace Period warning icon then providers should contact parents and remind them to reconfirm their eligibility with HMRC or they will not be able to access the Extended Entitlement after the Grace Period has expired. If the parents are no longer eligible they will not be able to claim extended hours after the Grace Period.

5. Grace period end dates are always one of the following dates: 31 March, 31 August or 31 December.

6. For term time only children Grace Period funding will cease at the end of the school term. This could be before or after the Grace Period end date.

### Recheck Dates

<table>
<thead>
<tr>
<th>Eligibility recheck</th>
<th>Local Authority eligibility recheck date suggested by DFE</th>
<th>Validity End Dates</th>
<th>Grace Period End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring: Mid-term</td>
<td>11 - 18 February</td>
<td>1 Jan - 10 February</td>
<td>31 March</td>
</tr>
<tr>
<td>Summer: Start of term</td>
<td>24 March - 1 April</td>
<td>11 February - March</td>
<td>31 August</td>
</tr>
<tr>
<td>Summer: Mid-term</td>
<td>27 May - 2 June</td>
<td>1 April - 26 May</td>
<td>31 August</td>
</tr>
<tr>
<td>Autumn: Start of term</td>
<td>24 August - 1 September</td>
<td>27 May - 31 August</td>
<td>31 December</td>
</tr>
<tr>
<td>Autumn: Mid-term</td>
<td>22 October - 29 October</td>
<td>1 September - October</td>
<td>21             31 December</td>
</tr>
<tr>
<td>Spring: Start of term</td>
<td>24 December - January</td>
<td>22 October - December</td>
<td>31 March</td>
</tr>
</tbody>
</table>

**Important Note:** Children whose Grace Period End Date has already passed are not eligible for extended hours in the following term so will **not** have a ‘Grace Period’ warning icon because their eligibility to 30 hours has already ended. The extended hours will be recorded as 0 [zero].
H. Submitting claims using 2 year old voucher codes

*Important note: Your school must be registered to offer funding for 2 year olds.*

1. Eligible 2 year olds are issued with a unique EY voucher code. For children resident in another local authority area parents/carers must apply to Kirklees Council; please do not accept a voucher or letter from another local authority. **Do not add children without a valid EY code as they may not be eligible for funding.**

2. Select ‘Funding’ then select ‘Actuals’ and select the relevant 2 year old term.

3. Select *Enter EY Voucher*, enter the voucher code, child’s date of birth and surname. Note: enter date of birth in format DD/MM/YYYY or DD-MM-YYYY.

4. The code is unique and will only work if the child’s surname and date of birth entered on the Portal match the application the parent submitted to Kirklees. If incorrect details are added three times, the portal will lock for a short period of time. If the code does not work please contact the FEEC Team.

5. After submitting the voucher details, the screen defaults to the *Summary* screen.

6. Select the *Child Details* tab to check child name matches the birth certificate and that the address is correct. Ethnicity and SEN COP must be completed.
7. Select the **Funding Details** tab; please complete funding details.
8. When you have completed all the details click **Save**.
9. Press **Send Claim**.

### I. Termly Funding Confirmation Process

When you have submitted your online claim it is a requirement to separately confirm your funding figures using the **Termly Funding Confirmation** forms. If there is a variance between the number of hours and children submitted on the claim and the number of hours and children quoted on the confirmation form, the FEEC Team will contact you to establish why and determine whether there has been an omission from the claim.

Please use your Registers and Parent Agreements to complete your confirmation to ensure you have not missed a child from your claim on the Provider Portal and also check you have no unsubmitted records before the termly claim deadline.

1. Select **Forms**.

2. Select the relevant **Termly Funding Confirmation** form.

   **Please select a form below to update your details:**
   - 30 Hours
   - Child Increasing or Decreasing Hrs After Headcount
   - Notification of Child Leaving a Funded Place SUM17
   - Revised Kidtines Agreement 2017-18 PV1 & Academies
   - Termly Funding Confirmation for 2 Yr Olds x2
   - Termly Funding Confirmation for 3&4 Yr Olds

3. Enter the following details on the Termly Funding Confirmation Form:
   - Total number of funded children: For 3&4 year olds count only those children who are accessing **Extended Entitlement** hours; do not include 3&4 year old children who are claiming only the Universal Entitlement.
   - Total number of funded termly hours (total weekly hours x number of weeks in term). For 3&4 year olds count only Extended Entitlement hours; do not include Universal entitlement hours.
Example: 10 children accessing 15 Extended Entitlement hours in the autumn term would be calculated as follows:

10 children x 15 hours x 14 weeks = 2100 funded hours.

J. Viewing Payment Summary and Adjustments

*Important note: Funding amounts are not updated until the FEED Team have imported your claim.*

1. Select **Funding**
2. Select **Summary**
3. **Select Year and Term**

   ![Select Year and Term]

4. Select Funding Type **2 Year Olds** or **3&4 Year Olds**.

   ![Summary: 2019/20 Summer - 3 & 4 Yr Old (example)]

*Important notes:*
• Funding adjustments can be positive or negative (negative are denoted in brackets).
• The payment date shown is the date the FEEC Team processed the payment, not the date the payment is received by the school.
• Early Years Pupil Premium (EYPP) is not paid on Extended Entitlement hours.
• IDACI deprivation funding is paid on both Universal and Extended hours.

5. Click on the icon next to Child Weightings Total for further information (IDACI & EYPP).

6. To view the funding summary for individual children select the ‘Actuals’ tab.

7. Double clicking on a child’s name will provide full details of payment relating to that specific child. To view funding weightings for that child click on the icon next to Child Weightings Total for further information (IDACI).

8. Claims must be imported by the FEEC Team for payment information to be up to date, if the child’s status shows as ‘Unchanged’ then the record has been imported and the information should be accurate. If status is ‘Edit pending/submitted’ or ‘Add pending/submitted’ then please wait until the record status is ‘Unchanged’.

32
Viewing adjustments

1. Select ‘Funding’

2. Select ‘Adjustments’

3. Select Year and Term - click on the ▶ icon to open the term.

4. Select Funding Type 2 Year Olds or 3&4 Year Olds.

5. Click on the ▶ icon to view full details of the adjustment. Note adjustments can show as paid or unpaid.

6. You will then see full details of the adjustment including amount and reason.
7. If you require further information about the adjustment please contact the FEEC Team.

Free Early Education and Care Team Contact details:
Telephone: 01484 225752
E-mail: feecteam@kirklees.gov.uk

K. Sufficiency Data Collection

You will be contacted by the Childcare Sufficiency team when this information requires completing and guidance will be provided.