



Early Years Provider Portal

A guide for private, voluntary and independent providers

Version 170316

www.lancashire.gov.uk

Contents

Introduction	2
Logging in and changing your password	3
Authentication Questions	4
Maximum hours allowed per term	6
Completing your headcount information	7
Managing child records and headcount information	8
Deleting a child record that are no longer required	9
Adding actual attendance hours for existing child records	10
Stretching the entitlement	12
Early Years Pupil Premium (EYPP)	13
How to identify which children qualify for EYPP	15
Adding new child record and attendance hours	17
Date of birth not eligible within term	18
Submitting your headcount information	19
How to print a copy of your headcount information	20
Supplementary claim	20
Ethnicity & SEND codes	24
Payment information	26
Forms Library	28
Funding Agreement	28
Update your details	31
Staff information	34
Adding new staff records	35
Amending staff records	38
Deleting staff	39
Submitting changes	40
Logging out of the Provider Portal	42
System requirements	42

Introduction

The Early Years Provider Portal has been introduced to make the submission of information to Lancashire County Council more secure and convenient.

This document contains user guidance to help you access the Provider Portal, submit details of your childcare service to the Family Information Service and also submit Free Early Years Education Funding claims for 2, 3 & 4 Year Old Children if registered for this.

If you would like to register your childcare setting for Free Early Years Education please contact us at FEE234@lancashire.gov.uk

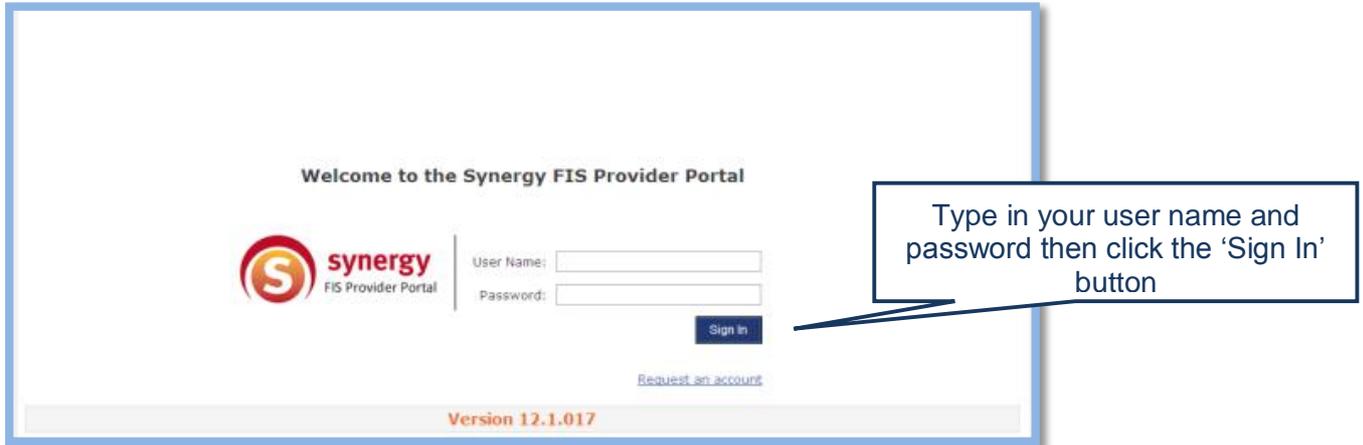
Please read this document before submitting any information, as this will help you understand the process of logging into the Provider Portal, updating your records and submitting your headcount and supplementary claims correctly.

If you have any issues accessing the Provider Portal please contact us by email on FEE234@lancashire.gov.uk for assistance.

Logging in and changing your password

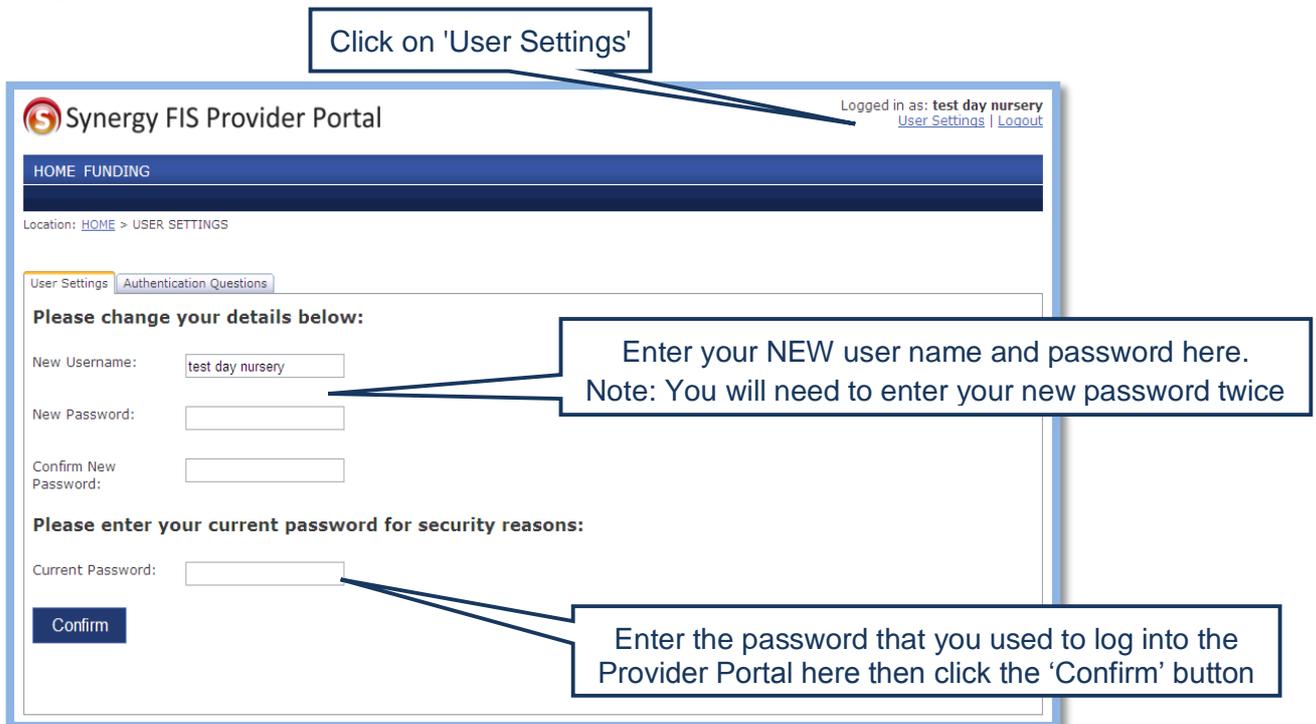
Lancashire County Council's Early Years Provider Portal can be found at the following web address:

<https://fisonline.lancashire.gov.uk/EarlyYears/DataCollection/login.aspx>



If you are a new childcare provider, you will have received an email or letter from the Family Information Service containing a Username and Password to enable you to log into the Provider Portal. If you are registered to provide Free Early Years Education you will have already been given a Username and Password by the Free Early Years Education Team.

If you have not received login information for the Provider Portal please contact us by email on FEE234@lancashire.gov.uk for assistance. If you wish to change your password then click on the **'User Settings'** link at the top right hand corner of the screen.



Please note, passwords are case sensitive, however, user names are not.

Passwords standards

Should be a minimum of 8 characters, use a combination of letters, numbers, symbols, upper case and lower case, the more complex the better. Please remember this portal contains sensitive personal data about children.

You will see a green confirmation box when your details have been successfully changed, and you can click the **'Home'** option on the main menu to return to the home page.

Authentication Questions

In order to further protect the information you enter on our Provider Portal, we have a feature called **'Authentication Questions'**. This is similar to many websites such as online banking whereby you create an answer to a question and you will then be asked for random letters from the answer each time you wish to access the funding section of the portal.

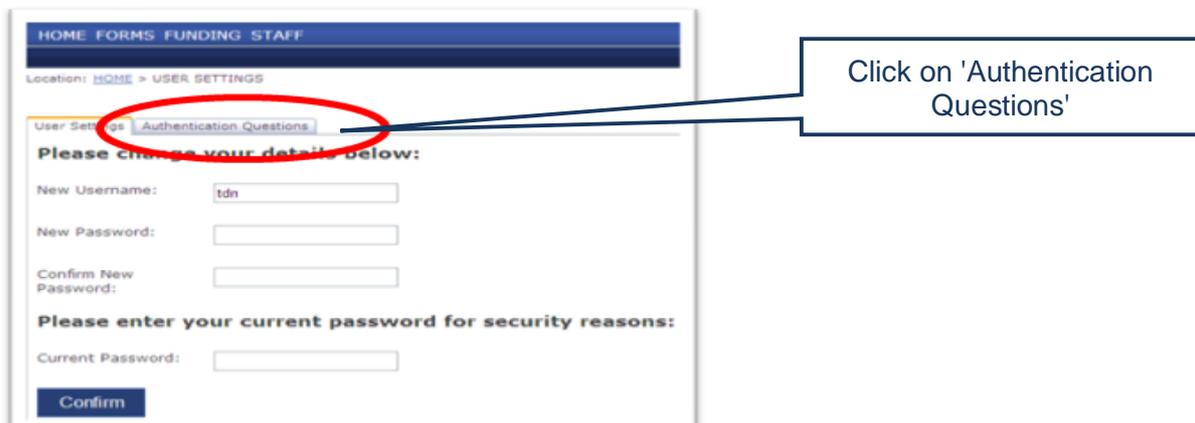
When you log into the portal and try to enter the funding section, you will be presented with the authentication screen. The first time you encounter this screen you will need to follow the instructions below. Every other time you see the screen you will need to enter the relevant letters of your answer.

How to create answers to the authentication questions

Once you are logged into the portal, at the top right hand side of the screen there is a link called **'User Settings'**:



Click this link and you will see the following screen, this is the screen where you can change your username and password if you wish, however, in order to create authentication question answers please click the **'Authentication Question'** tab:



You will then see the next screen:



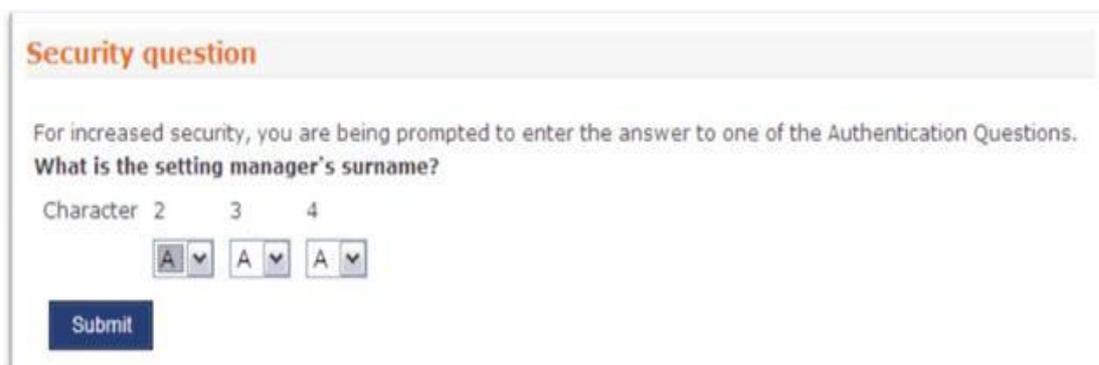
To create your answers, please click on the first question in the list which is **'What is the setting manager's surname?'** and then on the right hand side please enter your answer to the question in the **'New Answer and Confirm New Answer'** boxes.

The first time you use this screen, you need to enter the word **answer** in the **'Old Answer'** box as this is the default response. For all future times you use this screen you will need to enter your manager's surname in this box.

Once you have answered the first question, click save and then repeat for the second question which is **'What is your favourite colour?'** The default old answer for this question has also been set to **answer**. Please note that your new answer needs to be at least 4 letters or more, so you cannot use 'red' as your favourite colour.

Once you have completed the answer to the second question, click save.

You must then click the funding tab at the top of the page where you will be asked for random letters from one of the two questions:



Once you have chosen the correct letters and clicked submit, you will then be able to access all of the Provider Portal pages until you log out.

Maximum Hours Allowed per Term

Lancashire County Council manage the funding of 2, 3 & 4 year old Free Early Education across three terms of the year. The maximum number of hours each child can claim in one year is 570 hours. This is divided into three terms as detailed below:

Term Name	Date From	Date To	Maximum (standard) number of hours per child available in term	Maximum (standard) number of funded weeks available in term
Autumn	1 September	31 December	210	14
Spring	1 January	31 March	165	11
Summer	1 April	31 August	195	13
Total	1 September	31 August	570	38

Important note: If a child claims their full 15 hours per week you will not be able to claim funding for every week in the term, as there are more calendar weeks in a term than there are funded weeks. The number of weeks in the term is defaulted to zero, therefore, you **MUST** update the number of weeks to ensure you do not claim more hours than the termly maximum allowed.

For example in the Autumn term, there are 16 calendar weeks available from 01 September and 31 December, however, if a child is claiming 15 hours per week the maximum number of weeks that you can claim is 14, because you cannot claim more than 210 hours in the Autumn term (i.e. 15 hours per week multiplied by 14 weeks = 210 hours).

It is essential that you amend from zero the number of weeks being claimed for each child to ensure that the maximum number of hours for each child is not exceeded. Failure to do this will result in you claiming more hours than is allowed, and this will result in an administration charge.

Stretched Hours

It is possible to stretch the FEE funding over the academic year by claiming less than 15 hours per week. If this is the case, however, please note:

- If the total 'stretched' hours are still equal to the maximum number of funded hours allowed in the term, it is easier for you to enter this on your headcount claim as the standard number of weeks and hours for that term. This will avoid any rounding issues.
- If you allow parents/carers to bank hours from one term to the next you cannot claim more hours than the termly maximum as detailed above. You will need to make parents aware that any banked hours cannot be moved to another setting should the child move within the academic year
- You cannot claim more than 15 hours per week
- You cannot claim more than 10 hours per day

- You cannot claim less than 2.5 hours per day
- If a child starts or becomes eligible part way through the year you can only claim pro-rata for the remainder of the academic year
- Your attendance records and parental agreements must reflect the actual hours of attendance

Completing your Headcount Information

Please note the following sections are for registered eligible providers of Free Early Education ONLY

If you would like to become a registered eligible FEE provider please contact us at FEE234@lancashire.gov.uk advising that you wish to become a new provider, stating your name, setting name, Ofsted Registration Number. We will then forward you an application form for completion.

Please note that you cannot offer FEE until you have been accepted as a registered eligible FEE provider by the FEE Team. Further details are available on our webpage – copy the link below and insert in your browser bar

<http://www3.lancashire.gov.uk/corporate/web/?siteid=2979&pageid=45658&e=e>

You must ensure that you have a signed Parental Agreement in place for all children that you are making a claim for. If you do not have a signed Parental Agreement in place you do not have consent from the parent to make a claim. Also, you must keep on record proof of the child's date of birth i.e. copy birth certificate/passport.

Click on the '**Funding**' tab on the main menu to enter the funding section of the Provider Portal.

Click the 'Funding' item on the main menu

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with 'HOME' and 'FUNDING' tabs. Below the navigation bar, there is a sub-menu with 'Summary', 'Actuals', and 'Adjustments' options. A callout box points to the 'FUNDING' tab. The main content area displays 'Provider Headcount Records' with a table showing one record for the year 2011/12, term Summer, and funding type 3 & 4 Year Funding. The table has columns for 'Summary', 'Year', 'Term', and 'Funding Type'. A 'View' link is present next to the record. The page also shows pagination information: 'Previous | Page: 1 | Next | [1 Result]'.

When you select Funding a sub-menu will appear immediately below showing Summary, Actuals and Adjustments options. Click on the '**Actuals**' sub-menu item to open the **Provider Headcount Records** screen, which will display all of the funding terms for which you have submitted headcounts.

Click the **'Open'** option for the current term ensuring that you choose the term with a Funding Type of 3 & 4 Year Old Funding or 2 Year Old Funding (this is the 2 year old data collection) only.

Only choose the current term from the current year and the funding type 'FEE 3 & 4 Year Old Funding' or 'FEE 2 Year Old Funding' only. Other funding types may be displayed, these are used by LCC only.

Actuals	Year	Term	Funding Type
Open	2011/12	Summer	3 & 4 Year Funding
Open	2011/12	Spring	3 & 4 Year Funding
View	2011/12	Spring	2 Year Old Project
Open	2011/12	Spring	Flexibility Funding
Open	2011/12	Spring	Rurality

This summary page will show all relevant funding Years, Terms and Types for your provision
Click the 'Open' option for the current term

Managing Child Records and Headcount Information

Once you have selected the correct term from the Provider Headcount Records screen you will see the **'Submit Actuals'** screen for the term selected. It is from here that you will manage and submit your headcount details.

This screen will be pre-populated to display the details of all children who have been submitted on your previous headcount return and are still eligible for funding. From this screen you can:

- Remove child records that are no longer required i.e. child has left setting
- Add actual attendance hours for your existing child records
- Add new child records to your headcount submission
- Submit your headcount to LCC for processing

Each time you add, remove or change the details of a child record it will be saved in the Provider Portal, and you will be able to revisit and make further changes at any time **before the end of the current headcount submission period.**

Deleting child records that are no longer required

The Submit Actuals screen will initially show all of your eligible child records that have been carried forward from the previous term.

You must ensure that you delete all children that no longer attend your setting as failure will result in a £25 Administration fee if you leave them on your headcount with zero weeks/hours.

Records can easily be removed from the headcount by selecting the **'Request Delete'** option for the relevant child record. When you request the deletion of a child record this will be submitted to the Free Early Education Team, who will remove the child(ren) from your headcount when processing your claim.

Synergy FIS Provider Portal

Logged in as: test day nursery
User Settings | Logout

HOME FUNDING

Summary Actuals Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > ACTUALS

Manage Providers: Test Day Nursery (Day Nursery)

Submit Actual: 2011/12 Summer - 3 & 4 Year Funding

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Request Delete Edit	Unchanged	Builder, Bob	09-Apr-2008	42.00	0.00
Request Delete Edit	Unchanged	Fireman, Sam	03-Jun-2008	105.00	0.00
Request Delete Edit	Unchanged	Postman, Pat	02-Oct-2007	63.00	0.00

Add Child Send Claim

Click 'Request Delete' to remove child records that are no longer required

After clicking the **'Request Delete'** option you will be asked to confirm your action:

Synergy FIS Provider Portal

Logged in as: test day nursery
User Settings | Logout

HOME FUNDING

Summary Actuals Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > ACTUALS

Manage Providers: Test Day Nursery (Day Nursery)

Submit Actual: 2011/12 Summer - 3 & 4 Year Funding

	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Request Delete Edit	Unchanged	Builder, Bob	09-Apr-2008	42.00	0.00
Request Delete Edit					
Request Delete Edit					

Request Delete

Are you sure you want to request the deletion of child: Postman, Pat from this headcount record?
Delete requests are automatically submitted but can be cancelled.

Add Child Send Claim

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Click 'Yes'

The status for records for which a Request Delete has been confirmed will be changed to **'Delete Pending'** so you can easily identify which records will be removed.

Adding actual attendance hours for existing child records

*Please ensure that all mandatory fields which are marked by a * are completed before submission, as failure will result in a delay in the claim being processed and incur a £25 administration charge.*

Existing child records will be shown with the status **'Unchanged'**, you must still Edit all records where a status of **'Unchanged'** is showing in order to submit a headcount claim for these child records. To add actual attendance hours click the **'Edit'** option for each child record.

The screenshot shows the Synergy FIS Provider Portal interface. At the top, it says "Synergy FIS Provider Portal" and "Logged in as: test day nursery". Below this, there are navigation tabs for "HOME" and "FUNDING". A message says "Please select a provider from the drop down below". The location is "HOME > FUNDING > ACTUALS". There is a "Manage Providers" dropdown menu showing "Test Day Nursery (Day Nursery)". A section titled "Submit Actual: 2011/12 Summer - 3 & 4 Year Funding" contains a table of child records. The table has columns for "Request Delete", "Edit", "Status", "Child Name", "Date of Birth", "Funded Hours for Term", and "Non-Funded Hours for Term". Three records are shown, all with a status of "Unchanged". The "Edit" buttons for each record are highlighted with callout lines pointing to a text box below the screenshot.

Request Delete	Edit	Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Request Delete	Edit	Unchanged	Builder, Bob	09-Apr-2008	42.00	0.00
Request Delete	Edit	Unchanged	Fireman, Sam	03-Jun-2008	105.00	0.00
Request Delete	Edit	Unchanged	Postman, Pat	02-Oct-2007	63.00	0.00

Click the 'Edit' option for a child record to add actual attendance hours

This will open the **'Child Details'** screen. There are a number of required fields which will need to be completed for a child record before it can be re-saved and submitted.

As most of the information will be pre-populated it is likely that you will only have to update the Weeks Attended, Funded Hours (between 2.5 and 15 to nearest half hour) and Non-Funded hours information for existing child records.

The **'Weeks Attended'** field will be defaulted to zero. Please amend this from zero to reflect the weeks you are actually claiming the funding for.

Click on 'Child Details' tab first

Please ensure that you complete **all** relevant screens:- 'Child Details', 'Funding Details', 'Parent/Carer Details'

Please select a provider from the drop down below

Please enter Date of Birth in the format dd/mm/yyyy

Click on the 'Funding Details' tab

Tick this box for all children you are making a claim for

If your term dates match FEE then click here

Please input the number of weeks **AND** amend the number of funded hours to ensure that you do not exceed the termly maximum hours. You **must not** leave the number of funded hours or weeks as 0.00

Complete all required fields in the Funding Details, Parent/Carer Details, and Notes tabs and then click the 'Save' button to update the record.

Ensure that you tick the Present During Census for **all** children that you are making a claim for. You can claim for all children that are booked in or physically present during the headcount week.

Please ensure that you amend the number of weeks **AND** enter the number of funded hours to ensure that you do not exceed the termly maximum hours/weeks.

Where the child has been claimed for in a previous term, those hours will already be pre-populated in the current term, therefore, please ensure that you amend the number of funded hours that the child is attending in the current term. Likewise, you must not leave the number of funded weeks as 0.00 as we will action as a deleted child.

You need to input the 'Term Start and Term End' dates as these are mandatory fields.

If you have standard terms dates that match the FEE term dates then click on the 'Default Term Dates' tab which will then populate the current term dates into these fields.

Once you have entered the relevant information in the 'Child Details', 'Funding Details', and 'Notes' tabs, click on **'Save'** it will take you back to the **'Submit Actuals'** screen, which will now show the status of the child record as **'Edit Pending'**. Repeat this process for every child you wish to claim funding for who are present/planned present in the headcount week.

For all eligible 2 year old children you must quote the LCC eligibility reference number from the LCC letter to the parent in the 'Notes' section.

EYPP information can **ONLY** be submitted for 3&4 year old children. The EYPP details should be entered on the Parent/Carer Tab, for more details information about this please refer to page 14.

The screenshot shows the 'Notes' tab in the provider portal. At the top, there is a navigation bar with 'HOME', 'FORMS', 'COURSES', 'FUNDING', and 'STAFF OFSTED'. Below this, there are tabs for 'Summary', 'Actuals', and 'Adjustments'. The current page is titled 'Child Details' and shows the child's name 'Johnny Vagas' and DOB '02-Feb-2011'. There are four tabs: 'Child Details', 'Funding Details', 'Parent / Carer Details', and 'Notes'. The 'Notes' tab is active. A callout box points to the 'Notes' tab with the text 'Click on the 'Notes' tab'. Another callout box points to a dropdown menu for 'Manage Providers' with the text 'Please select a provider from the drop down below'. A third callout box points to a text area for adding a new note with the text 'Type any notes in here that are relevant to the claim'. A fourth callout box points to the 'Save' button with the text 'Complete all required fields then click the 'Save' button to update the record.' The text area contains the following text: 'Add a new note: Add any claim relevant details For children subject to an Adoption order or Special Guardianship Order please provide details of the Order number and date'. The 'Notes History' section shows 'No Historical Notes'. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that '*denotes mandatory fields'.

Stretching the entitlement over the whole of the term

This is where the child attends less than 15 hours a week for more than 38 weeks per year, **but still** claims their full entitlement of 570 hours in the academic year (e.g. a child may be attending for 49 weeks of the year, which averages out at 11.632353 hours per week). Because the Provider Portal will only accept 2 decimal places, do

not round up or down the decimal places as this will either result in your hours being over the maximum, or you being paid less than the full entitlement.

When inputting the child's attendance for these children you need to 'standardise' the hours and weeks for that term as follows:-

FEE Term	Termly max. hours	Termly max. weeks	Termly max. hours
Autumn	210	14	15
Spring	165	11	15
Summer	195	13	15

Also you **must** keep evidence of the child's actual attendance for Audit purposes.

A child that attends only 1 day a week may only claim a maximum of 10 hours a week and may not exceed the academic yearly allowance of 520 hours, providing that the setting is a full year setting i.e. 52 weeks a year.

Early Years Pupil Premium (EYPP) for 3 and 4 year old children

EYPP information can ONLY be submitted for 3 & 4 year old children. The EYPP details should be entered on the Parent/Carer Tab.

Eligibility is for three and four year old children accessing Free Early Education based on the following criteria:

- **Children from low income families (as defined by the criteria for free school meals).**
- **Child has been looked after for 1 day or more**
- **Child has been adopted from care in England or Wales**
- **Child has left care under a special guardianship order or child arrangement order in England or Wales**

The child will only become eligible for EYPP the term after their third birthday.

Early years providers are responsible for identifying children from low income families who may be eligible and **must** gain the consent of parents/carers to share their information in order for the local authority to undertake an eligibility check.

Details of the benefit claimant **must** to be added on the '**Parent/Carer Details**' tab. These details will then be used to check the parent/carers eligibility. Please ensure that you have received the parent/carers consent for these details to be retained and used.

The screenshot shows the 'Parent / Carer Details' section of the portal. At the top, there are navigation tabs: HOME, FORMS, COURSES, FUNDING (selected), and STAFF OFSTED. Below these are sub-tabs: Summary, Actuals, and Adjustments. A message box says 'Please select a provider from the drop down below'. The location is 'HOME > FUNDING > CHILD DETAILS' and the provider is 'Test Day Nursery (Test Provider Type)'. The child's name is 'Johnny Vagas' and DOB is '02-Feb-2011'. The 'Parent / Carer Details' section has a note: 'Details are optional but if entered then all fields must be filled in.' There are input fields for Forename, Surname, and DOB. Below these are checkboxes for 'NI or' and 'NASS Number'. A callout box points to these checkboxes with the text: 'The NI and NASS number is validated – input in the format noted below'. At the bottom left are 'Save' and 'Cancel' buttons. A callout box points to the 'Save' button with the text: 'Complete all required fields then click the ‘Save’ button to update the record.' A small asterisk next to the 'Save' button indicates that fields marked with an asterisk are mandatory.

NI means National Insurance Number in the format of: 2 letters, 6 numbers, 1 letter
 NASS Number means National Asylum Seeker Service Number in the format of: 9 numbers

Once you click '**Save**' it will take you back to the '**Submit Actuals**' screen, which will now show the status of the child record as '**Edit Pending**'.

There is a '**Notes**' screen where you can document any claim relevant notes.

Important Note: You will not be paid EYPP if you fail to include the required information as part of your headcount claim, as the information is automatically calculated with the headcount amount due each term. We cannot process this manually at a later date.

EYPP for 3&4 year old Child Looked After (CLA) within Lancashire Authority

We will check our records for any CLA children within Lancashire and note them as such. However, after headcount payment you have not been funded for a child you believe to be a CLA within Lancashire, please send a secure email to FEE234@lancashire.gov.uk advising of the child's name, address, date of birth along with the Social Workers name and contact detail in order for us to validate the claim.

EYPP for 3&4 year old Child Looked After (CLA) from outside of Lancashire Authority

Any CLA that you are including on your headcount submission, that are not under the jurisdiction of Lancashire County Council, will require written confirmation from the owning Authority that the child is a CLA within their Authority before the headcount closure date.

The owning Authority is to email confirmation to fee234@lancashire.gov.uk before headcount closure date.

If we have not received written confirmation from the owning authority before headcount closure date, you will not receive EYPP payment for the child.

EYPP for 3&4 year old Adoption and Special Guardianship

For Adoption or Special Guardianship children you **must** provide the Court Order number in the Notes Tab. Failure to do so will cause delay in your payment being processed as we will be unable to validate your claim.

Once you click on **'Save'** it will take you back to the **'Submit Actuals'** screen, which will now show the status of the child record as **'Edit Pending'**.

Synergy FIS Provider Portal

Logged in as: test day nursery
[User Settings](#) | [Logout](#)

HOME **FUNDING**

Summary **Actuals** Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > ACTUALS

Manage Providers: Test Day Nursery (Day Nursery)

Submit Actual: 2011/12 Summer - 3 & 4 Year Funding

		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Delete	Edit	Edit Pending	Builder, Bob	09-Apr-2008	42.00	0.00
Request Delete	Edit	Unchanged	Postman, Sam	03-Jun-2008	105.00	0.00
Request Delete	Edit	Unchanged	Postman, Pat	03-Oct-2007	63.00	0.00

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

Once updated the status of the record will show as 'Edit Pending'

Click the **'Edit'** option on another child record, and repeat this process until all records are updated.

How do I know which children qualify for EYPP

On the **'Summary'** tab you will be able to view the amount of EYPP that has been paid and to how many children this relates to.

Lancashire County Council Early Years Provider Portal

Logged in as: User Settings | Log

HOME FORMS COURSES **FUNDING** STAFF OFSTED

Summary **Actuals** Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > SUMMARY

Manage Providers: Test Day Nursery (Test Provider Type)

Provider Headcount Records

Previous | Page: 1 2 | Next [10 Results]

	Summary	Year	Term	Funding Type
View		2014/15	Summer	Fee 3 & 4 Year Old Funding
View		2014/15	Summer	Fee 2 Year Old Funding
View		2014/15	Spring	Fee 3 & 4 Year Old Funding
View		2014/15	Spring	Fee 2 Year Old Funding

Click on 'View'

Open the term that the EYPP has been claimed in.

Then click on the grey arrow against the title of **'Child Weightings Total'** which will advise of how many children and how many hours have been paid EYPP.

Click on the arrow to view how many children the EYPP funding relates to

Actuals	
Term Length (Weeks)	12.0
Funded Hrs (Term)	1809.00
▶ Total Rate Per Hour	£4.0
<hr/>	
Sub Total (Hrs x Total Rate)	£7236.00
▼ Child Weightings Total	£2061.30
1446.00 hrs on 14 children	£1156.80
Area 1 Supplement (£0.8)	
1809.00 hrs on 17 children	£904.50
EYPP (£0.5)	
<hr/>	
Term Funding Amount	£9297.30
Interim Amount Paid (before Adj)	£0.00
<hr/>	
Term Funding Amount Balance	£9297.30
Adjustments Paid	£0.00
<hr/>	
Actual Amount Paid (Inc Adj)	£0.00

To find out which of the children claimed on your head count qualify for EYPP you need to view this via the headcount form.

Click on **'Funding'** then **'Actuals'** which will show you the list of children that you claimed on your headcount.

Look under the column titled **'Child Weightings'** and where EYP is showing, this means that the child meets the EYPP eligibility.

Lancashire County Council Early Years Provider Portal Logged in [User Settings](#)

HOME FORMS COURSES **FUNDING** STAFF OFSTED

Summary **Actuals** Adjustments

Location: HOME > FUNDING > ACTUALS Manage Providers: Test Day Nursery (Test Provider)

View Actuals: 2014/15 Summer - Fee 3 & 4 Year Old Funding

	Status	Child Name	Date of Birth	Funded Hours for Term	Child Weightings	Last ECS D
View	Unchanged	Hoskins, Bob	10-Jan-2011	195.00	EYP	

Click 'Actuals'

Click 'Funding'

EYP showing here means that the child qualifies for the EYPP element

There are different combinations of information shown here which will advise you of the status of the EYPP element for the specific child you are searching on. Full details are as follows:-

Child Weightings tab	Last ECS Date tab	Means
Blank	Blank	Child has not been checked
EYPP	Not Blank	Child has been checked and found eligible
Blank	Not Blank	Child has been checked and found not eligible
EYPP	Blank	Child has not been checked, but is eligible under CLA or other discretionary criteria

Adding new child records and attendance hours

You can add the details of new children, which is a very similar process to updating existing child records. Start by clicking the **'Add Child'** button highlighted below; this will open up a blank child record screen as before.

Click the 'Add Child' button to add a new child record.

Complete all required fields and tabs (same as **'Edit'** child) then click the **'Save'** button to update the child record and return to the **Submit Actuals** screen:

The fields for **Ethnicity** and **SEND** Stage will default to unknown, please complete these fields for each child.

Please enter postcodes correctly, including a space between the two halves of the postcode.

The new child record will now be shown on the headcount screen with a status of **'Add Pending'**.

HOME FORMS COURSES **FUNDING** STAFF OFSTED

Summary Actuals Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > CHILD DETAILS

Name: Pippa The Pig DOB: 01-Jan-2011

Child Details Funding Details Parent / Carer Details Notes

Child Details

Forename* Pippa
 Middle Name
 Surname* The Pig
 DOB* 01-Jan-2011
 Proof of DOB
 Gender* Male Female
 Preferred Surname The Pig
 Ethnicity* WBRI White - British
 SEN COP Stage* N No Special Educational Needs

Address Line 1* 7 Fairfield Road
 Address Line 2
 Address Line 3
 Locality Fulwood
 Town Preston
 County Lancashire
 Postcode* PR2 8EL

Save Cancel *denotes mandatory fields

Complete all relevant screens along the top tabs as previously described

Please enter Date of Birth in the format dd/mm/yyyy

Click the 'Save' button to update the record and return to the headcount screen

NOTE: For all eligible 2 year old children you must quote the LCC eligibility reference number from the LCC letter to the parent in the 'Notes' section.

Dates of Birth not eligible within term

In this screen you can add details into the '**Add a new note**' section as to why the child's date of birth is not eligible for this term.

Please **ONLY** use the wording as follows:-

- Child held back from school by parents – **Child held back**
- For children under appeal for school placement – **Pending School Place Appeal**

In the '**Notes History**' you will then be able to view the notes for the child that you have submitted on the Provider Portal. The FEE Team will then receipt approval of your notes which are listed in chronicle order as the example below.

HOME FORMS COURSES **FUNDING** STAFF OFSTED

Summary Actuals Adjustments

Please select a provider from the drop down below

Location: HOME > FUNDING > CHILD DETAILS

Manage Providers:

Child Details Notes

Add a new note:

Notes History

Approved for payment	13/11/2012, 3:54 PM
Pending School Place Appeal	13/11/2012, 3:48 PM

Save Cancel *denotes mandatory fields

Submitting your headcount return

You are ready to submit your headcount return once you have:

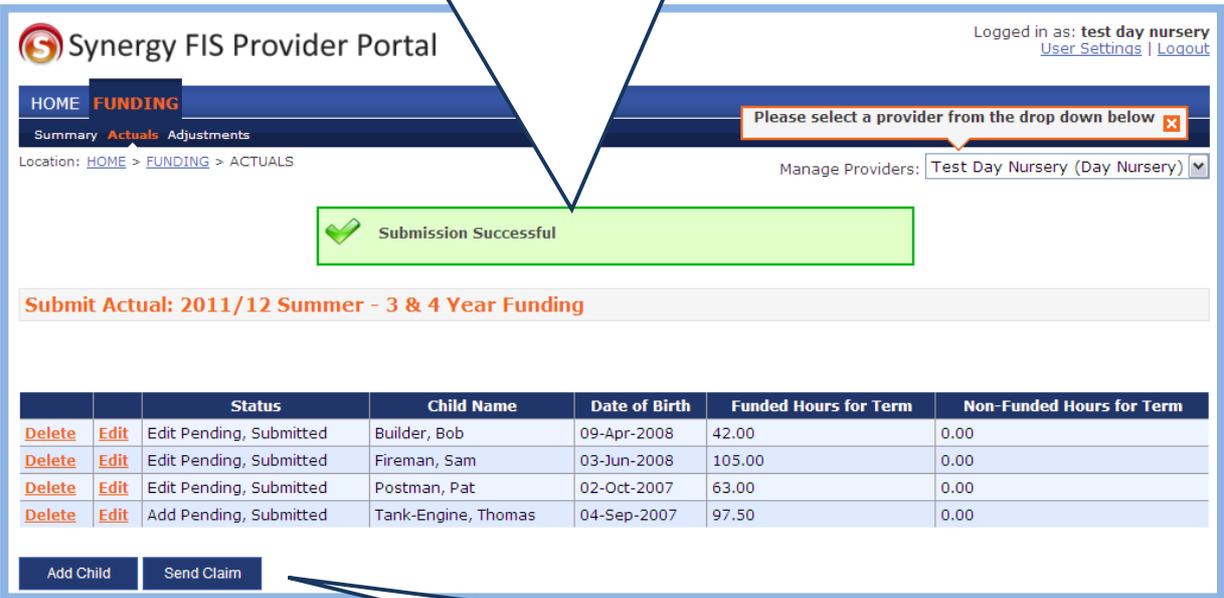
- Requested the removal of any child records which are not required
- Reviewed existing attendance hours/weeks for all existing child records where appropriate
- Added new child records and attendance hours/weeks

To submit your headcount return, simply click the **'Send Claim'** button on the Submit Actuals page.

If you fail to include any children who were present during headcount week, you will not be able to submit another headcount.

Errors or omissions in your headcount claim will result in a £25 Administration charge being deducted from your payment (as outlined in clause 10.15 of the Funding Agreement).

You will see a green **'Submission Successful'** message and the status of your records will be updated to **'Submitted'**.



The screenshot shows the Synergy FIS Provider Portal interface. At the top, it says "Synergy FIS Provider Portal" and "Logged in as: test day nursery" with links for "User Settings" and "Logout". The navigation menu includes "HOME" and "FUNDING". Under "FUNDING", there are tabs for "Summary", "Actuals", and "Adjustments". The current page is "Actuals". A message box says "Please select a provider from the drop down below". Below that, it says "Manage Providers: Test Day Nursery (Day Nursery)". A green box with a checkmark and the text "Submission Successful" is displayed. Below this, there is a section titled "Submit Actual: 2011/12 Summer - 3 & 4 Year Funding". A table shows the following data:

		Status	Child Name	Date of Birth	Funded Hours for Term	Non-Funded Hours for Term
Delete	Edit	Edit Pending, Submitted	Builder, Bob	09-Apr-2008	42.00	0.00
Delete	Edit	Edit Pending, Submitted	Fireman, Sam	03-Jun-2008	105.00	0.00
Delete	Edit	Edit Pending, Submitted	Postman, Pat	02-Oct-2007	63.00	0.00
Delete	Edit	Add Pending, Submitted	Tank-Engine, Thomas	04-Sep-2007	97.50	0.00

At the bottom of the table, there are two buttons: "Add Child" and "Send Claim".

Only click 'Send Claim' once you are confident the claim is fully completed and accurate.

Please note: **'Submission Successful'** will only show at the top of the screen, therefore, if your list of children is long you may not be able to see this.

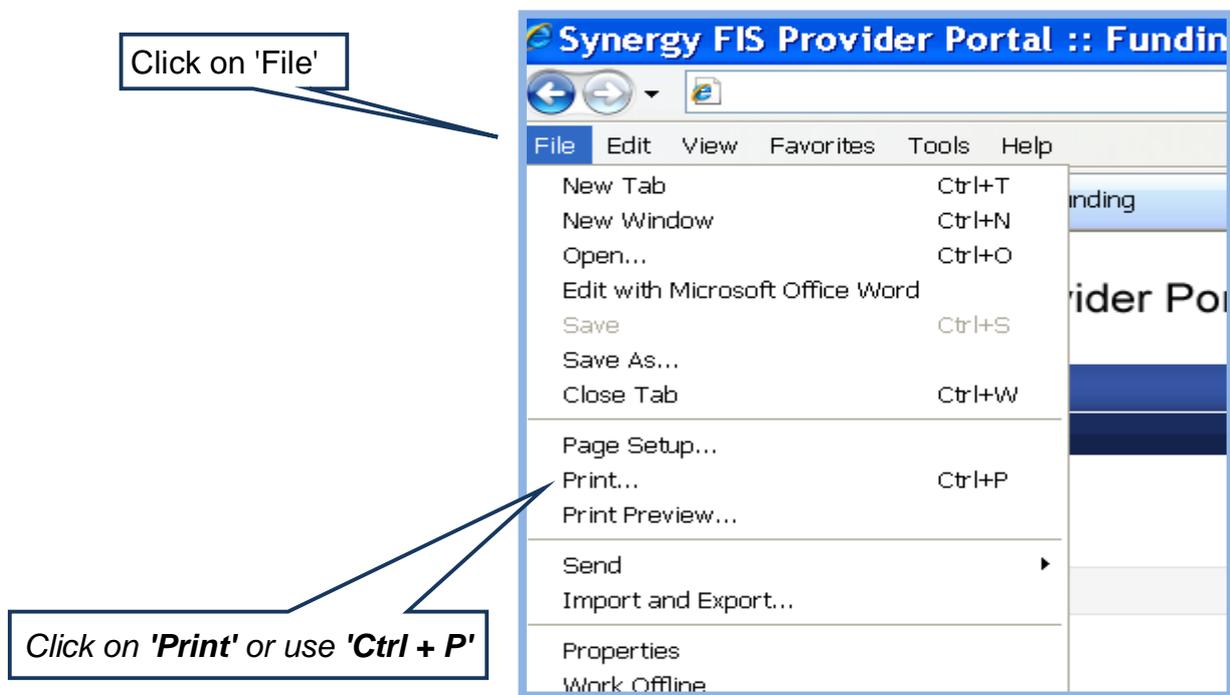
NOTE: You can submit your headcount record at any point during the headcount submission period. If you realise that you have made a mistake on a child's hours, or if circumstances change you can simply re-edit the relevant

child records as many times as necessary and click the 'Send Claim' button and before the end of the headcount submission period.

The online submission of headcount will not be possible after the closure of the headcount submission period. If you fail to submit your headcount claim within the specified period you will be charged a late penalty fee as outlined in clause 10.15 of the Funding Agreement.

How to print a copy of your submitted headcount

If you would like to take a copy of the submitted headcount form you will need to click on the 'File' icon on the top tool bar from the relevant page (the page with the children's summary data displayed) then click on 'Print' or use 'Ctrl + P'.



Supplementary Headcount Claims

You must ensure that you have a signed Parental Agreement in place for all children that you are making a claim for. If you do not have a signed Parental Agreement in place you do not have consent from the parent to make a claim. Also, you must keep on record proof of the child's date of birth i.e. copy birth certificate/passport.

Please Note: You must complete one email for each child you wish to make a supplementary headcount claim for.

Supplementary Headcount Claims will only be accepted for claims made after the termly headcount date for:-

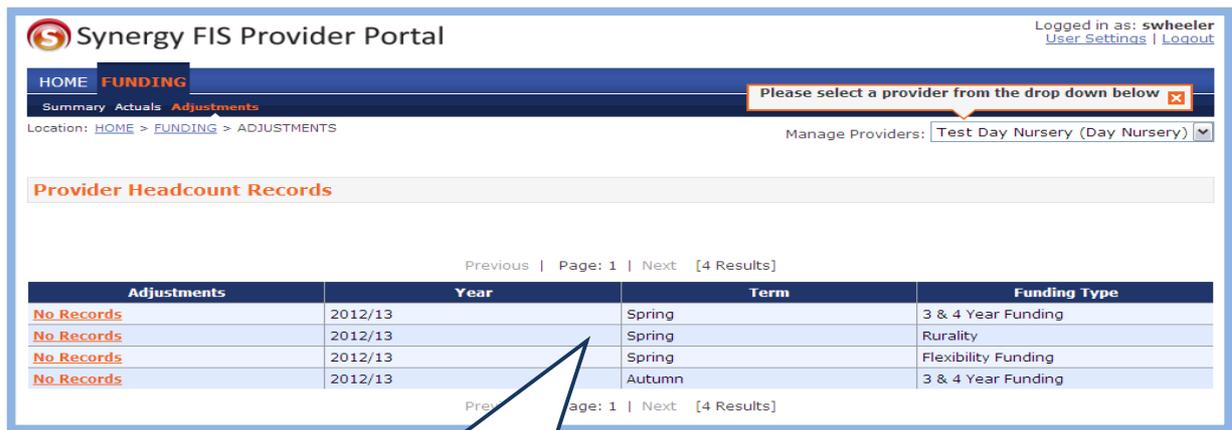
- new children attending after the headcount period;
- children increasing their hours within the termly maximum;
- transferring from other settings with remaining hours within the termly maximum.

You cannot submit a supplementary claim until the child's FEE placement date has passed i.e. we will not accept post-dated claims.

From the **'Funding'** tab, click the **'Adjustments'** link in the dark blue bar at the top of the screen:



This will take you to the following screen:



Select the term and year you are to make a claim in

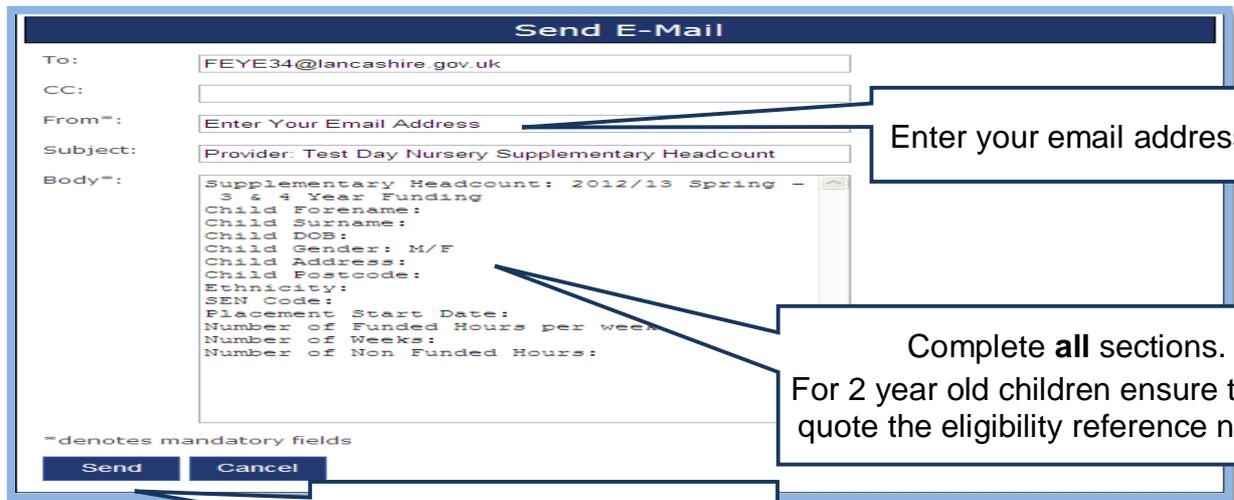
Select the term and year relating to the correct funding type you are making a supplementary claim for, i.e. 'FEE 3 & 4 Year Old Funding' for 3 & 4 year olds and 'FEE 2 Year Old Funding' for 2 year olds. To move to the next screen, select the link in the first column. If no adjustments (including supplementary claims) have been made so far, this will be displayed as **'No Records'**, if adjustments have been made,

this will display 'View x Record(s)' where x equals the number of adjustments made already.

After clicking the link, you will see the adjustments screen which allows you to view any adjustments that have been made to your funding and the detail behind this.



In order to complete a supplementary claim simply click the 'Send E-Mail' button and a new screen will appear.



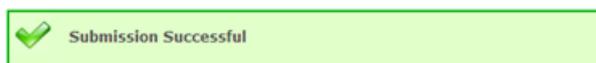
Enter your email address here

Complete all sections. For 2 year old children ensure that you quote the eligibility reference number.

Click Send only once fully completed

Please ensure that you enter your email address in the 'From' area then simply complete the body of the email fully with the details of the child you are claiming for.

NOTE: For all eligible 2 year old children you must quote the LCC eligibility reference number from the LCC letter to the parent in the 'Notes' section.



Once fully completed and you have clicked on Send, you will see a green Submission Successful message as above.

The email system in use within the Provider Portal is fully secure and capable of sending child details without risk of interception.

Please ensure that you complete **all** lines of the claim form, as failure to do so will result in a delay of payment of the claim and will incur a £25 administration charge.

You can **only** make a supplementary claim for the following:

- ✓ **Children who have started with you after the headcount week.**
- ✓ **Children who have increased their hours of attendance since the headcount date. In these cases you can only claim the additional hours from the date the hours of attendance increased.**

- **Ofsted Reference number – DO NOT LEAVE THIS BLANK**

This is the unique number Ofsted number.

- **Child Forename – DO NOT LEAVE THIS BLANK**

Please record the full, not shortened or familiar versions.

- **Child Surname – DO NOT LEAVE THIS BLANK**

Please record child's legal surname as per the birth certificate.

- **Date of Birth (DOB) – DO NOT LEAVE THIS BLANK**

Please enter the child's date of birth.

- **Gender - DO NOT LEAVE THIS BLANK**

Please **only** record the child's gender as follows:

M	Male
F	Female

- **Child Address – DO NOT LEAVE THIS BLANK**

Please enter both the house number/name and the name of the road.

- **Child Postcode – DO NOT LEAVE THIS BLANK**

Please enter the postcode

- **Ethnicity – DO NOT LEAVE THIS BLANK**

Only use ethnicity from the list below of recognised ethnic descriptions and codes. Please select a code according to how the parents/carers describe the child's ethnic origins and not as you perceive the child.

WBRI	White, British
WIRI	White, Irish
WIRT	Traveller of Irish Heritage
WROM	Gypsy / Roma
WOTH	White, any other White Background
MWBC	Mixed, White and Black Caribbean
MWBA	Mixed, White and Black African
MWAS	Mixed White and Asian
MOTH	Mixed, any other mixed background
AIND	Asian or Asian British, Indian
APKN	Asian or Asian British, Pakistani
ABAN	Asian or Asian British, Bangladeshi
AOTH	Asian or Asian British, Any other Asian Background
BCRB	Black or Black British, Caribbean
BAFR	Black or Black British, African
BOTH	Black or Black British, Any other Black background
CHNE	Chinese
OOOTH	Any other ethnic background
REFU	Did not wish to be recorded
NOBT	Not Obtained

- **SEND Code – DO NOT LEAVE THIS BLANK**

Please record the applicable SEN code from the list below.

N	No Special Educational Need
S	Statement of SEN
E	Education, health and care plan
K	SEN support

- **FEE Funding Start Date (First day of FEE funding for this term) – DO NOT LEAVE THIS BLANK**

This is the date you wish to claim FEE funding from. This must be after headcount week and **after** the date of the Parental Agreement was signed by the parent giving consent for the claim to be made. If a child is increasing their hours this will be the date they are increasing their hours from. For a 2 year old child that has been referred part way through the term this will be the date of the LCC eligibility letter and **after** the date of the Parental Agreement was signed by the parent giving consent for the claim to be made that is issued to the parent. Do not submit a post-dated supplementary claim i.e. submit before the child's actual start date as this will be returned unprocessed.

- **Number of Funded Hours per week – DO NOT LEAVE THIS BOX BLANK**

Please enter the number of hours you wish to claim per week. If a child is increasing their claim please enter the number of additional hours they wish to claim.

- **Number of Weeks – DO NOT LEAVE THIS BOX BLANK**

Please enter the number of weeks you wish to claim the funding over, if a child is increasing their claim only enter the number of weeks they are claiming the additional hours.

Please refer to our termly maximums to ensure you do not exceed the weekly/termly maximum.

Autumn:

- Term dates: 1st September to 31st December
- Termly maximum 210 hours
- Weekly maximum
 - Child attending 2 or more days per week - 15 hours per week
 - Child attending 1 day a week - 10 hours per week

Spring:

- Term dates: 1st January to 31st March
- Termly maximum 165 hours
- Weekly maximum
 - Child attending 2 or more days per week - 15 hours per week
 - Child attending 1 day a week - 10 hours per week

Summer:

- Term dates: 1st April to 31st August
- Termly maximum 195 hours
- Weekly maximum
 - Child attending 2 or more days per week - 15 hours per week
 - Child attending 1 day a week - 10 hours per week

- **Number of Non Funded Hours per week – DO NOT LEAVE THIS BOX BLANK**

These are the number of hours per week that the parent/carer is paying you for.

- **Attends 2 or more days – DO NOT LEAVE THIS BOX BLANK**

The Statutory Code of Practice states a maximum of 10 hours can be taken in one day. If more than 10 hours are being claimed please select 'Yes' to confirm their hours are being taken over two days or more. This information is requested to ensure that the provision is being delivered in-line with the Code of Practice.

- **2 Year old Eligibility Reference Number – DO NOT LEAVE THIS BOX BLANK FOR A 2 YEAR OLD CLAIM**

Input the eligibility reference number from the parent's eligibility letter here. Failure to provide this number may result in a delay in payment.

- **EYPP for a 3&4 year old child – DO NOT LEAVE ANY OF THESE SECTIONS BLANK THAT YOU WISH TO CLAIM EYPP FOR**

Failure to complete any of these sections will result in no EYPP eligibility check undertaken and therefore no payment will be made.

You can only claim EYPP for a child that you are making a supplementary claim for i.e. you cannot complete for EYPP for a child you claimed for on your headcount.

- Parents Forename
- Parents Surname
- Parents Date of Birth
- Parents National Insurance Number (NI)
- Parents NASS Number (if applicable)

Payment Information

Within the Provider Portal there is a handy screen which allows you to see information relating to payments made by Lancashire County Council to you for each term and for each funding type (FEE 2 year old funding or FEE 3 & 4 year old funding).

This screen can be accessed by clicking on the **'Summary'** link at the top of the page:

Click on **'Summary'**

Click on **'View'**

Summary	Year	Term	Funding Type
View	2012/13	Summer	FEYE 3 & 4 Year Old Funding
View	2012/13	Spring	FEYE 3 & 4 Year Old Funding
View	2012/13	Spring	Rurality
View	2012/13	Spring	Flexibility Funding
View	2012/13	Autumn	FEYE 3 & 4 Year Old Funding

From this page, you will need to select the term, year and funding type that you wish to view, this can be completed by clicking the **'View'** link on the line you require.

This will open the summary screen for that term and funding type:

Summary: 2012/13 Spring - FEYE 3 & 4 Year Old Funding	
Actuals	
Term Length (Weeks)	13.00000
Funded Hrs (Term)	123.00
▶ Total Rate Per Hour	£3.57
Sub Total (Hrs x Total Rate)	£439.11
Term Funding Amount	£439.11
Interim Amount Paid (before Adj)	£0.00
Term Funding Amount Balance	£439.11
Adjustments Paid	£0.00
Actual Amount Paid (Inc. Adj)	£0.00
Total Weekly Non-Funded Hours	13.50
Paid	No
Paid Date	

The information displayed is as follows:

- Term Length (Weeks)**
 This refers to the actual length of the term, **not** the number of funded weeks, for example in the Summer term this will display 21 weeks, however, at 15 hours per week the maximum number of weeks that can be funded is 13.
- Funded Hours (Term)**
 This is the total number of hours claimed for all children within the term.
- Total Rate Per Hour**
 This is the rate at which each funded hour will be paid, included in the base rate is 0.06p for SEND.
 The detail of the rate can be viewed by clicking the arrow next to the rate title:

▼ Total Rate Per Hour	£4.15
Base Rate	£4.15

- Sub Total (Hours x Total Rate)**
 This is the multiplication of the total number of hours claimed for by the total hourly rate as explained above.
- Term Funding Amount**
 This is the amount due to you based on the number of hours claimed for times by the total rate per hour but without taking into account any adjustments, i.e. the maximum funding that you are entitled to.
- Term Funding Balance**
 This is the total amount you have claimed for within the term.

- **Adjustments Paid**

This is the total of any adjustments that we have paid you during the term. Adjustments are paid for various reasons but mainly for any supplementary claims which are children starting after the headcount date. The details of any adjustments paid can be viewed under the '**Adjustments**' page which is accessed via the link at the top of the page. This is the screen that you will see by following this link:

▼ Adjustments - Total: £50.16, Paid Date: 18-Nov-2014								
Type	Date Added	Child Name	Date of Birth	Number of Hours	Weightings per Hour	Rate per Hour	Amount	Reason
Child	18-Nov-2014	Hoskins Bob	10-Jan-2011	12.00	£0.00	£4.18	£50.16	Autumn Supp

Please email the Authority to request changes to the adjustments.

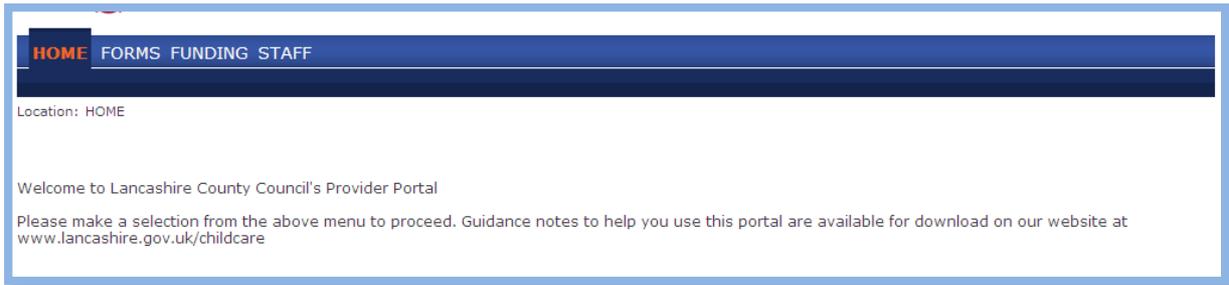
[Send E-Mail](#)

Please note that the hours for this adjustment will not be displayed on the Actuals screen for the child as the hours for a supplementary are counted as an adjustment and are displayed in the adjustments section as outlined above.

- **Actual Amount Paid (Including Adjustments)**
This is the final balance of how much you have been funded for including all adjustments that we have made on your record, this will include the headcount claim and any adjustments made including supplementary claims.
- **Total Weekly Non-Funded Hours**
This is the total of all the children's non-funded hours for the term.
- **Paid**
This is a Yes/No display that tells you if we have processed your main headcount payment.
- **Paid Date**
This is the date that we sent your payment via our payment system. This **is not** the date that the payment has entered your bank, this will be 5-7 working days **after the date** displayed here.

Forms Library

The following forms are available for completion by accessing the '**Forms**' tab at the top of the page within the portal:



Forms available are:-

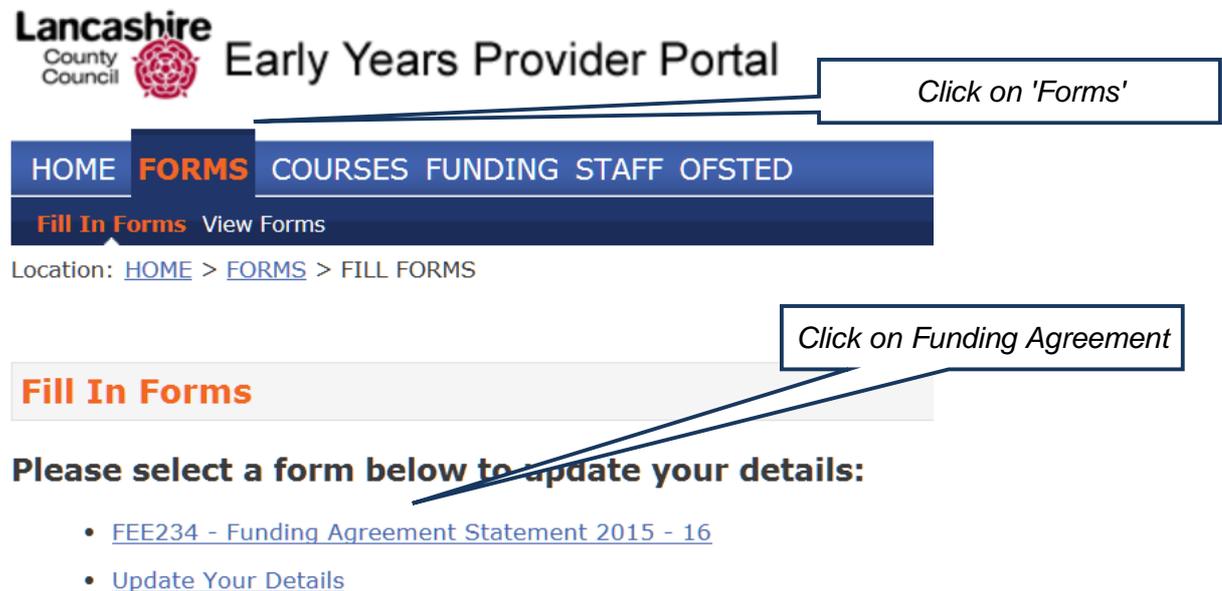
- **'Funding Agreement' Form**

The Funding Agreement for the Provision of Free Early Education (FEE) for 2,3 and 4 year old children is an agreement that is renewed annually every September.

All Service Providers are required to accept the terms and conditions of the Funding Agreement if they wish to offer FEE for 2,3 and 4 year olds.

This form allows you to confirm your acceptance to the Funding Agreement between LCC and your setting.

The process to accept the terms of the Funding Agreement are as follows:-
Click on 'Forms' on the top tool bar



Once you have clicked on the Funding Agreement a table is then viewed which you are required to fully complete. Use the scroll bar at the side to move through the table.

Ensure that you complete all the statements.

Synergy FIS Provider Portal :: Forms : Info Path Form - Windows Internet Explorer

Services Providers Statement to the Funding Agreement For the Provision of Early Education for Two, Three and Four Year Old Children: 2015-16

Next Page Select page: D8 Funding Agreement Statement 21

Childcare Provider Name:

OFSTED Reference:

[Click here to view the Funding Agreement for the Provision of Early Education for Two, Three and Four year old children: 2015-16](#)

An Authorised Signatory means such a person with the appropriate authority or permission from the Service Provider to bind the Service Provider to the terms of this Agreement. The Council reserves the right to request evidence of this permission from time to time, and the Service Provider must provide this immediately upon request.

As an authorised signatory of the above Childcare Provider I confirm that:

I agree to all the terms of the above agreement Yes No

Authorised person means any person with the appropriate authority or permission from the Service Provider to bind the Service Provider to the terms of the Funding Agreement.

I agree to all the terms of the above agreement Yes No

By ticking this box, I confirm that I will provide Free Early Education for 3 & 4 year old children.

By ticking this box, I confirm that I will provide Free Early Education for 2 year old children.

Full name of authorised person completing this form:

Please enter today's date:

Do not click the SUBMIT FORM button until you have read and accept all the terms of the above agreement and wish to become or remain a provider of Free Early Education. By clicking the SUBMIT FORM button you are confirming your acceptance of the terms and your authority on behalf of the Childcare Provider to do so and upon receipt of an email from the Council confirming the agreement you will be legally bound as the Service Provider under the agreement.

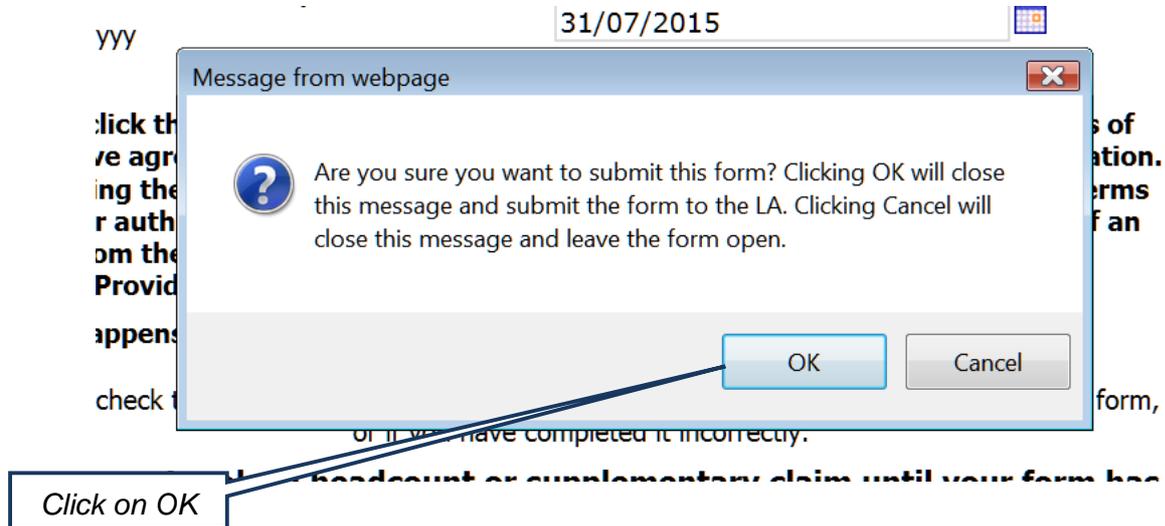
What Happens Next?

We will check the details you have entered and email you to let you know if we accept your form, or if you have completed it incorrectly.

You cannot make a headcount or supplementary claim until your form has been accepted as being correctly completed.

Submit Form

A check box will then appear, if you are happy with the details you have completed then click on **'OK'**. If you think you have made a mistake then click on **'Cancel'** and you can then review the information that you have completed in the table. If you do this, please ensure that you follow the process above again in order to submit the form.



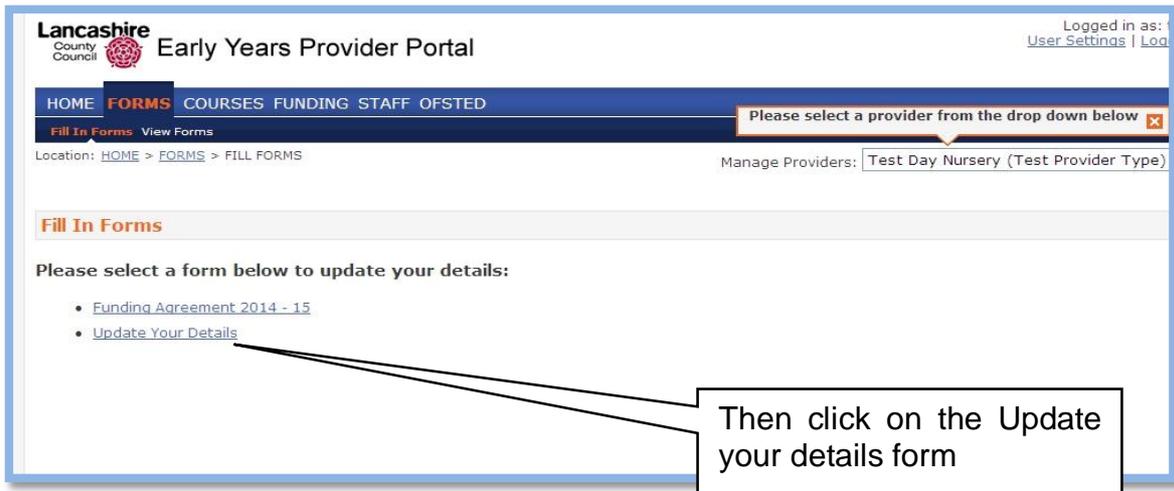
The Funding Agreement Form will then be received and reviewed by the FEE Team.

• 'Update Your Details' Form

We publicise your setting via the Family Information Service and in order to ensure that we have the most up to date information about your setting, this form is available for you to view what our database contains about your setting and also to request amendments. Your information is available to the public via telephone, face to face and the internet if you give appropriate consent by using this form. This form contains three pages.

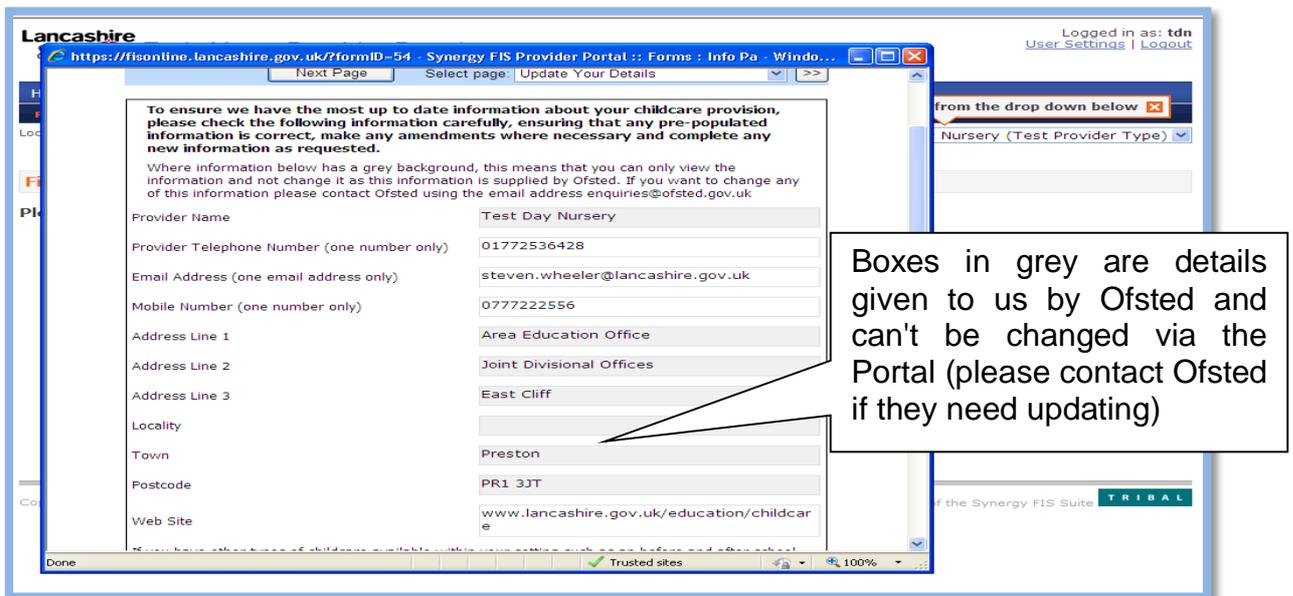
To advertise your details online, over the telephone and in writing for free, with the Family Information Service, you need to complete the **'Update Your Details Form'** on the provider portal.



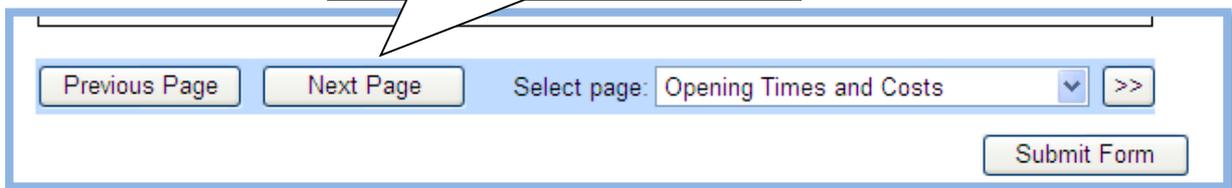


This will then open a separate window where you can add or edit the details of your setting.

The first page shows your settings address and contact details.



Click 'next page' to continue filling in your details



Consultation and regular feedback from parents suggests they would like you to display as much information on your setting as possible to ensure they get a full picture of the service you offer to enable them to make an informed choice about their available childcare options.

Displaying your opening times will help parents to see at first glance if you offer childcare to fit with the times they require

Opening Times and Costs

Please amend or add your opening times below:

Daily Opening Times, please use 24 hour clock format for your opening (e.g. 07:30) and closing times (e.g. 18:00)

Day	Start Time	End Time
1	6:00	14:00
2	7:00	17:00

Lancashire Family information Service understands that costs may vary for a variety of reasons for example by age, however parents and carers do like a guideline price to help them make an informed decision about the cost they might expect to pay when selecting the right childcare for their family. We strongly advise parents and carers to discuss and agree individual requirements and costs with each childcare provider before entering into a childcare agreement.

Please state an average price for the most appropriate cost options listed below:

Cost per Hour £

Cost per Session £

Cost per Day £

Cost per Week £

Parents have informed us that they are more likely to contact providers that have included guideline costs

The service description is the part with which you can sell the unique aspects of your settings, don't be shy!

Tell us how good your service is. This information is essential for parents. It can help make the difference between parents choosing your quality childcare setting as opposed to another quality Lancashire childcare setting.

Please include as many unique selling points that you offer within your service as you can. don't be shy, this is your chance to sell your childcare provision!!!

Schools Collection and Drop Off

If you offer a drop off or collection service to local schools in your area please list below the schools to which you would be willing to travel to:

School
215
242

Click 'next page' to continue filling in your details

Families with school aged children can really benefit from knowing which schools you pick up or drop off from

Update Your Details

Previous Page Select page: Opening Times and Costs

Do you cater for over 8s

What is the lowest age in months you will provide care for?

What is the highest age in months you will provide care for?

Vacancy Information

Lancashire Family information Service understands that your childcare vacancies will vary on a daily basis and that your Ofsted registration offers flexibility regarding child places in order to meet parental demand and operate with minimum staffing costs.

How many vacancies do you have currently (please use numbers only, no words):

Further information about vacancies, for example your vacancy may only be available in the afternoons or apply to specific age ranges such as 0 - 2 years etc.

Facilities Offered

Please list the appropriate facilities that you offer as part of your service below:

Facilities Available

Facility
1160
1206
1208

Insert item

Callouts:

- We understand vacancies change all the time but having information here can be the difference between parents ringing you or not
- Facilities can paint a really good picture of what you have to offer as a childcare provider

Consent to Publish Information to Parents in Lancashire

By checking the boxes below you consent that we will use your details to promote your service via:

Face to face or over the telephone On www.lancashire.gov.uk/childcare

In writing

For childminders only

Use full address details Use limited address details

Previous Page Select page: Update Your Details Submit Form

Callouts:

- To enable your details to be advertised as widely as possible to parents looking for childcare please select all of these options
- Childminders can select to use a limited address (this will display only town and postcode as your address) some Childminders prefer to select this as a safeguarding measure
- Click 'previous page' to review any details
- To upload your details click 'Submit Form'

After you have submitted the completed form a member of FIS will look over your form and either approve it or give you a call if there is a problem.

You can view the status of any submitted forms via the Provider Portal by clicking on View Forms under the Forms tab.



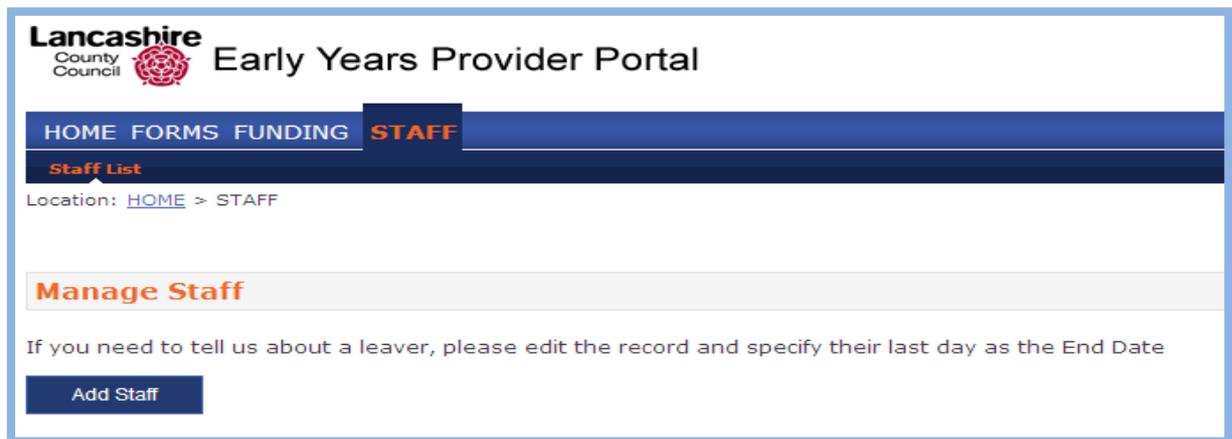
Staff Information

In future releases of the Provider Portal we will be introducing the ability to apply for training courses online. In order for this module to work effectively, we need to know which staff you have working at your setting. The staff information will also help us to target our future training offer to match the qualifications of all staff.

It is a requirement of all new Free Early Education funding providers that they complete the staff details on the portal. We would request that this information is kept up to date as often as possible.

The staff module of the provider portal can collect a large amount of detail about each staff member, however, by using these guidance notes you will be able to enter the minimum required for each staff member.

To access the Staff section, click on the **'Staff'** tab at the top of the portal:



You will then be presented with this screen. If you have staff records recorded on our system already, this screen will display a table showing this. Please see below for how to amend current staff records.

Adding new staff records

To add a new record, click on the 'Add Staff' button: this will then display the following screen:

HOME FORMS FUNDING STAFF

Staff List

Location: HOME > STAFF > STAFF DETAILS

Staff Main Details | Address/Other Details | Qualifications | Questions

Staff Details

Staff Type*

Title*

Forename*

Initials*

Surname*

DOB

Gender* Male Female

Main Registration Contact

Start Date*

End Date

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved With Provider	Main Contact	Census Contact
Test Day Nursery - Test Provider Type	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel *denotes mandatory fields

Any field marked with a * is mandatory and **must** be completed.

The screen is divided up into four tabs; '**Staff Main Details**', '**Address/Other Details**', '**Qualifications**' and '**Questions**'. The information you need to complete is as follows:

Staff Main Details

- **Staff Type**
Please choose from the list presented, we need you to identify one person as the main contact for your setting, this person must be given a staff type of 'NEG Contact', this is the main person we would deal with for Free Early Education enquiries. This person must also be identified as the main contact, and census contact in the blue table on the right of the page.
- **Title**
Please choose a title for the staff member.
- **Forename, Initials and Surname**
Please enter the initials of the person in the relevant box, this is the first letter of the forename and the first letter of the surname, e.g. Joe Bloggs would be JB.
- **DOB**
Date of Birth
- **Gender**
Please choose
- **Main Registration Contact**
Only one person per setting can be the main contact, please ensure that this is the same person as the main contact and the census contact as selected in the blue box on the right hand side of the screen.

- **Start Date**
This is the date that they started work with you.
- **End Date**
This is to be used when the person leaves your employment.
- **Registration Provider**
This is the blue box on the right hand side of the screen as mentioned above. If your registration is made up of different types of providers, e.g. day nursery, holiday scheme, out of school club then you can allocate the staff member to the provision that they are associated with. For example Joe Bloggs might work in the nursery but not in the out of school club, therefore, only tick the 'Involved with Provider' column for the nursery.

Address / Other Details

The screenshot shows a web form for staff details. At the top, there are navigation tabs: HOME, FORMS, FUNDING, and STAFF. Below this is a 'Staff List' link and a breadcrumb trail: Location: HOME > STAFF > STAFF DETAILS. The main form area has four tabs: Staff Main Details, Address/Other Details, Qualifications, and Questions. The 'Address/Other Details' tab is selected. The form is divided into two columns. The left column is titled 'Address' and contains input fields for Address Line 1, Address Line 2, Address Line 3, Locality, Town, County, Postcode, Telephone (Home), Telephone (Work), and Telephone (Mobile). The right column contains 'Ethnicity' (a dropdown menu), 'NI Number' (an input field), 'Post' (an input field), and 'Contact Preferences' which includes 'E-Mail Address' (input field), 'Include in Letters' (checkbox), 'Print Letters' (checkbox), 'E-Mail Letters' (checkbox), and 'Use Work Address' (checkbox). At the bottom left, there are 'Save' and 'Cancel' buttons. A note at the bottom center states '*denotes mandatory fields'.

- **Address Details**
The provider portal does allow staff personal details to be stored which would allow us to communicate with staff directly rather than sending correspondence to the setting. This may be useful for the online training course booking. We would not send any other correspondence directly to staff. Therefore, it is recommended that currently, the address details are left blank and the '**Use Work Address**' option is checked.
- **Ethnicity**
Not required to be completed.
- **NI Number**
Not required to be completed.
- **Contact Preferences**
This is the same as the address details in that for online course bookings it is possible to contact staff directly, therefore, currently it is recommended that these options are left blank.

Qualifications

The provider portal does allow qualifications of staff to be recorded. Currently, we do not require this information and therefore, are not suggesting the completion of this section, however, if you would like to keep a record of your staff qualifications, this can be carried out by clicking the '**Add Qualification**' button:

- **Qualification**
Select a qualification from the list displayed in the drop down. If the qualification you require is not in this list then please contact the FEE team via email at fee234@lancashire.gov.uk and we will add your request to the drop down list.
- **Start Date**
The date the qualification was commenced.
- **Date Achieved**
The date the qualification was achieved.
- **In Progress**
This should be checked if the qualification has not yet been achieved.
- **Completion Due Date**
If this is known it can be recorded here.
- **Date Seen**
This would be used to record the date you have seen the certificate.
- **Drop Out Reason**
This is not required.
- **Date Dropped Out**
This is not required.

- **Notes** For your use only.

Once you have completed this screen, click **'Save'** and this will take you back to the main screen where you can see the qualification listed. You can add further qualifications by clicking the **'Add Qualification'** button and repeating the process.

Questions

The provider portal allows questions to be created by the FEE Team, if any are created; they will be displayed on this screen. Currently there are no questions that relate to staff.

Once you are happy you have completed all of the information required, click the **'Save'** button. This will return you to the main screen where you will see all of the staff entered listed in a table.

Amending Staff Records

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > STAFF

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

	Status	Staff Name	Staff Type	Post	Start Date	Main Reg Contact
Delete Edit	And Pending	Flowerpot, Fifi	Childcare Worker		11-Jun-2012	<input checked="" type="checkbox"/>

[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

[Add Staff](#) [Submit](#)

To change any of the details of staff listed on the main screen, click the **'Edit'** button in the second column of the table. This will take you to the staff record screen:

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > [STAFF](#) > STAFF DETAILS

Staff Main Details | [Address/Other Details](#) | [Qualifications](#) | [Questions](#)

Staff Details

Staff Type*

Title*

Forename*

Initials*

Surname*

DOB

Gender* Male Female

Main Registration Contact

Start Date*

End Date

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved With Provider	Main Contact	Census Contact
Test Day Nursery - Test Provider Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

The use of this screen is the same for adding a staff member, please see above for details of how to use this screen.

Deleting Staff Members

Staff can be deleted once added if you have not submitted your changes to us. In the example below, this staff member has been added and not yet submitted, therefore, there is a **'Delete'** button in the first column of the table:

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > STAFF

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

		Status	Staff Name	Staff Type	Post	Start Date	Main Reg Contact
Delete	Edit	Add Pending	Flowerpot, Fifi	Childcare Worker		11-Jun-2012	<input checked="" type="checkbox"/>

[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

[Add Staff](#) [Submit](#)

If you click the **'Delete'** button, you will be presented with this confirmation message:

Delete

Are you sure you want to delete the newly added staff record for: Flowerpot, Fifi?

[Yes](#) [No](#)

Click **'Yes'** to delete or **'No'** to cancel.

Staff Leaving Employment

If staff have left your employment, you do not have ability to delete them from your setting. In order to remove them from your staff list, you should click the **'Edit'** button from the main screen and enter an **'End Date'** in the Main Details tab:

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > [STAFF](#) > STAFF DETAILS

Staff Main Details | Address/Other Details | Qualifications | Questions

Staff Details

Staff Type*

Title*

Forename*

Initials*

Surname*

DOB

Gender* Male Female

Main Registration Contact

Start Date*

End Date

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved With Provider	Main Contact	Census Contact
Test Day Nursery - Test Provider Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel *denotes mandatory fields

Submit Changes

Once any additions or changes to staff details have been completed, a submission is required to allow the FEE Team to see the changes you have made. This is carried out by clicking the **'Submit'** button on the main Staff page:

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > STAFF

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date

Previous | Page: 1 | Next [1 Result]

		Status	Staff Name	Staff Type	Post	Start Date	Main Reg Contact
Delete	Edit	Add Pending	Flowerpot, Fifi	Childcare Worker		11-Jun-2012	<input checked="" type="checkbox"/>

Previous | Page: 1 | Next [1 Result]

Add Staff **Submit**

Once this button has been clicked, you will see a green success message at the top of the screen that lets you know we have received your changes:

 **Submission Successful**

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

	Status	Staff Name	Staff Type	Post	Start Date	Main Reg Contact
Delete	Edit Add Pending, Submitted	Flowerpot, Fifi	Childcare Worker		11-Jun-2012	<input checked="" type="checkbox"/>

[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

[Add Staff](#)
[Submit](#)

You can monitor the progress of your submission by checking the text in the **'Status'** column on the staff main page. In this example, the staff changes have been submitted to the FEE Team but not yet processed by the Team. Once this has happened, you will see the message **'Unchanged'** displayed:

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

	Status	Staff Name	Staff Type	Post	Start Date	Main Reg Contact
Edit	Unchanged	Flowerpot, Fifi	Childcare Worker		11-Jun-2012	<input checked="" type="checkbox"/>

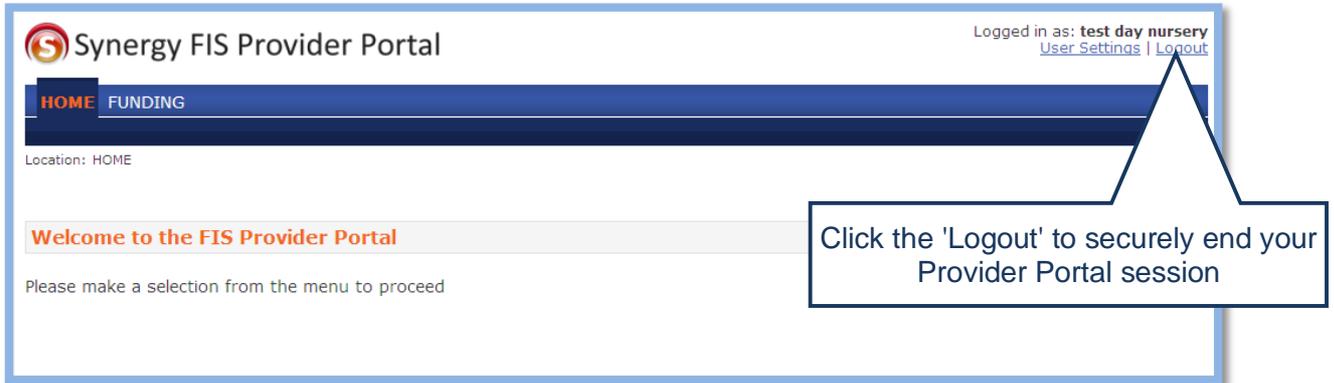
[Previous](#) | [Page: 1](#) | [Next](#) [1 Result]

[Add Staff](#)
[Submit](#)

You are free to make changes at all times; you do not need to wait until one set of changes has been processed before making further changes.

Logging out of the Provider Portal

You can click the '**Logout**' option at any time to securely end your Provider Portal session; any changed or added child records will be saved regardless of whether they have been submitted.



System Requirements

In order to use the Provider Portal you need to be in Internet Explorer 8 or above as you may find that when you click the '**Edit**' link on a child's record that nothing happens and you cannot enter the details of each child.

The solution to this is to download Internet Explorer 8 onto your computer or use a different browser such as Mozilla Firefox, Google Chrome or Apple Safari.