Early Education Funding
Provider Portal Guide

www.milton-keynes.gov.uk/childcare

Issued June 2014
Version 1.0
Introduction

Welcome to the Milton Keynes Council Provider Portal Guide. The Provider Portal has been introduced to make the submission of information to Milton Keynes Council secure and convenient.

This guide sets out to help you access the Provider Portal and details how to submit Free Early Years Entitlement Funding claims for two, three and four year olds. Please use this document to assist in submitting this information.

If you have any issues accessing the Provider Portal please contact us by email on nursery.education@milton-keynes.gov.uk or call 01908 254522.

Statement of Data Protection

The Data Protection Act 1998 regulates the processing of information relating to a living individual. This includes obtaining, holding, using or disclosing such information. It covers manual filing systems and records as well as computerised ones, card indexes and microfiche.

Data protection principles

1. Personal data shall be processed fairly and lawfully.
2. Personal data shall be obtained only for lawful purposes.
3. Personal data shall be adequate, relevant and not excessive.
4. Personal data shall be accurate and kept up to date.
5. Personal data shall not be kept for longer than is necessary.
6. Personal data shall be processed in accordance with the data subjects rights.
7. Personal data shall be kept secure.
8. Personal data shall not be transferred outside the EC unless adequate protection is available in that country in relation to personal data.
Logging in and changing your password

The portal can be found at the following web address:


If you are registered to provide Free Early Years Entitlement a username and password will have been provided.

The first time you log in you must change your password.
Click on the 'User Settings' link in the top right hand corner of the screen.
Passwords

- are case sensitive
- should be a minimum of 8 characters, use a combination of letters, numbers, symbols, upper case and lower case

When details have been successfully changed you will be presented with a green confirmation box: Click the Home option on the main menu to return to the home page.

Authentication Questions

In order to further protect the information entered on our Provider Portal, it is necessary to use ‘Authentication Questions’.

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 the authentication 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.

Enter your NEW username and password here. Note: You will need to enter your new password twice

Enter the password that you used to log into the Provider Portal here then click the ‘Confirm’ button
How to create answers to the authentication questions

Once logged into the portal, in the top right hand side of the screen click 'User Settings':

To create an authentication answer click the 'Authentication Question' tab:

To create your answer, highlight the question in the list and then on the right hand side enter your answer to the question in the New Answer and Confirm New Answer boxes.

The first time you use this, submit answer in the ‘Old Answer’ box and click save.
Click the funding tab at the top of the page where you will be asked for random letters from your answer to the authentication question:

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

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

When you select Funding a sub-menu will appear immediately below showing the following options:

- Summary
- Termly Funding Dates
- Estimate
- Actuals
- Adjustments
Estimate (Projections)

Click on the Estimates sub-menu item to open Provider Headcount Records. This will display all of the funding terms for which headcounts have been submitted.

Click the Open option for the current term ensuring that you choose the term with a Funding Type of 3 & 4 Year Olds or 2 Year Old Funding.

<table>
<thead>
<tr>
<th>Estimates</th>
<th>Year</th>
<th>Term</th>
<th>Funding Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014/15</td>
<td>Block 1</td>
<td>3 &amp; 4 Year Olds</td>
<td></td>
</tr>
<tr>
<td>2014/15</td>
<td>Block 1</td>
<td>2 Year Old Funding</td>
<td></td>
</tr>
</tbody>
</table>

Type in the number of weeks for the term being claimed for and the estimated number of funded hours per week for this term (eg. 10 children attending 15 hours per week = 150).

Submit Estimate: 2014/15 Block 1 - 3 & 4 Year Olds

Number of Weeks for this Term: 13.00
Estimate Number of Funded Hours Per Week for this Term: 0.00

Click on calculate to be presented with the total hours being claimed for (eg. 150 hours x 13 weeks = 1,950 hours). Click Send Claim to submit.
Actuals

Adding new child records and attendance hours

Click on the Actuals sub-menu to open Provider Headcount Records and click Open for the current term, with the relevant Funding Type of 3 & 4 Year Olds or 2 Year Old Funding.

Choose the current term from the current year and the funding type.

This summary page will show all relevant funding Years, Terms and Types for your provision.

Click the ‘Open’ option for the current term.

Now add the details of new children and submit your headcount details. Do this by clicking the Add Child button; this will open up a blank child record screen.

Click the ‘Add Child’ button to add a new child record.
Complete all required fields and **Save** to update the child record and return to the Submit Actuals screen.

**Remember to:**
- Ensure postcodes are entered correctly, including space between two halves.
- Complete ‘Weeks Attended’ field correctly, especially if open for fewer weeks or child started part way through block.
- Select Ethnicity, based on the Parental Contract and SEN Stage code (field will default to unknown) – see Annex A.

Please enter Date of Birth in the format **dd/mm/yyyy**
If claiming stretched entitlement:

- do not complete the weeks attended in term or funded hours per week fields;
- tick the stretched entitlement box on the right hand side;
- type stretched hours in any of the Monday to Friday boxes; (maximum 10 hours and minimum 2.5 hours per day, but break down not important).

Complete all required fields then click the ‘Save’ button to update the record and return to the Submit Actuals screen.

If stretched, leave weeks attended in term and funded hours per week blank.

Tick stretched offer and type in hours.

Complete all required fields then click the ‘Save’ button to update the record and return to the Submit Actuals screen.
Managing child records and headcount information

Select the term from Provider Headcount Records and click **Submit Actuals**. This screen will be pre-populated to display the details of all children who have been submitted on the previous headcount return and are still eligible for funding (from Block 3 onwards). From this screen you can:

- remove child records that are no longer required;
- add actual attendance hours for your existing child records;
- add new child records to your headcount submission; and
- submit your headcount to MKC for processing.

Each time you add, remove or change the details of a child record it will be saved in the Provider Portal. 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. Records can easily be removed from the headcount by selecting the **Request Delete** option for the relevant child record. When requesting the deletion of a child record this will be submitted to the database administrator, who will remove the children from the headcount when processing your return.

### Synergy FIS Provider Portal

<table>
<thead>
<tr>
<th>Status</th>
<th>Child Name</th>
<th>Date of Birth</th>
<th>Funded Hours Term</th>
<th>Non-Funded Hours Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Pending</td>
<td>Builder, Bob</td>
<td>09-Apr-2010</td>
<td>195.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Add Pending</td>
<td>Finerman, Sam</td>
<td>07-Feb-2010</td>
<td>195.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Add Pending</td>
<td>Postman, Pat</td>
<td>03-Mar-2010</td>
<td>70.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Click ‘Request Delete’ to remove child records that are no longer required.
After clicking the Request Delete option you will be asked to confirm the action:

The status for records for which a Request Delete has been confirmed will be changed to **Delete Pending**, to easily identify which records will be removed.
Adding actual attendance hours for existing child records

Existing child records will be shown with the status **Unchanged** on the headcount submission screen. To add actual attendance hours click the **Edit** option for each child record:

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.
If stretched entitlement, the funding details screen will look like this:

Most information pre-populated, so only need to update Weeks Attended, Funded and Non-Funded hours

Weeks attended pre-populated with maximum possible for this term – amend this field if open fewer weeks or child starts part way through.

Complete all required fields then click the ‘Save’ button to update the record and return to the Submit Actuals screen

If stretched, leave weeks attended in term and funded hours per week blank

Tick stretched offer and type in hours.
You will be returned to the **Submit Actuals** screen, which will now show the status of the child record as ‘Edit Pending’.

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.
Dates of birth not eligible within term

The note tab is only to be used for information regarding a child who's admittance to school is deferred until later in the year or until the term in which the child reaches compulsory school age or for a child who is starting school in September, was attending the same setting in the previous term and is claiming up to four weeks transition funding.

To add a note input the child's details in the Child Details tab. Enter details as to why the child's date of birth is not eligible for this term by entering one of the following. Please **ONLY** use the wording as follows:

- Child held back
- Pending School Place Appeal
- Transition Funding

Click 'Save', the database administrator will receipt approval of the notes.
Submitting headcount returns

The headcount return is ready to submit when you have:
- requested the removal of any child records which are not required;
- amended existing attendance hours to existing child records where appropriate; and
- added new child records and attendance hours.

To submit click **Send Claim** on the Submit Actuals page.

You will be presented with the following screen:

![Synergy FIS Provider Portal](image)

**Submit Actual: 2014/15 Block 1 - 3 & 4 Year Olds**

<table>
<thead>
<tr>
<th>Status</th>
<th>Child Name</th>
<th>Date of Birth</th>
<th>Funded Hours for Term</th>
<th>Non-Funded Hours for Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Add Pending, Submitted</td>
<td>09-Mar-2010</td>
<td>195.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Delete</td>
<td>Add Pending, Submitted</td>
<td>09-Jul-2010</td>
<td>195.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Delete</td>
<td>Add Pending, Submitted</td>
<td>17-Mar-2010</td>
<td>242.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Delete</td>
<td>Add Pending, Submitted</td>
<td>03-Mar-2010</td>
<td>70.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Please note:**
- The headcount record can be submitted at any point during the headcount submission period, however only one submission should be made during this period.
- Changes can be made to your entries up to the point of clicking the 'Send Claim' button.
- **The online submission of headcount will not be possible after the closure of the headcount submission period.**
Printing Submissions

If you would like a copy of the submitted headcount form click on the File icon on the top tool bar from the relevant page (the page with the children's summary data displayed) and click print.
**Post Headcount Claims**

Post Headcount Claims will only be accepted for claims made after the termly headcount date for new children or those children transferring from other settings in accordance with the Parental Agreement.

Claims will only be accepted by completion and submission of the Post Headcount Claim form.

Click on **Forms** on the main menu and complete the post headcount form:

![Early Education Provider Portal](image)
Click on post headcount to open the form:

![Post Headcount funding application form]

Fill out child’s details (maximum of two children per form) for any child who has started/left after headcount submission and click on submit form.

Submitted post headcount forms can be viewed by clicking on View Forms:

Will state when it was authorised by the database administrator and can view form by selecting from list.
Payment Information

To check the status of payments made for each term and for each funding type, click the 'Summary' link at the top of the page:

Select the term, year and funding type that you wish to view.

This will open the following screen:
• Payment shown is the total of all the projection payments you will receive this block and not the monthly payment.
• Interim % - this refers to the interim payments as a % of the total payment due for the block.
• Block 1 consists of 5 monthly payments (4 interim payments based on projections (80%) and 1 balancing payment based on headcount (20%)).
• Block 2 consists of 4 monthly payments (3 interim payments (75%) and 1 balancing payment (25%)).
• Block 3 consists of 3 monthly payments (2 interim payments (67%) and 1 balancing payment (33%)).
• Interim Amount Due - this is the total of all the interim payments due for the block. To calculate your monthly payment you will need to divide this amount by the total number of interim payments due in the block (see above).
Logging out of the Provider Portal

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.

Troubleshooting

If using Internet Explorer 10 you may find nothing happens when 'Edit' is clicked on a child's record.

To resolve this put Internet Explorer 10 into 'Compatibility Mode' by clicking the button at the top of Internet Explorer:

Once you have clicked this button, the website will allow you to enter all details. Alternatively use a different browser such as Firefox, Google Chrome or Safari.
### Annex A: Ethnicity and SEN codes

#### Ethnicity code

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

#### SEN code

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>No Special Educational Need</td>
</tr>
<tr>
<td>A</td>
<td>School Action or Early Years Action</td>
</tr>
<tr>
<td>P</td>
<td>School Action Plus or Early Years Action Plus</td>
</tr>
<tr>
<td>S</td>
<td>Statement of SEN</td>
</tr>
</tbody>
</table>
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