

GUIDANCE ON COMPLETING THE 9 MONTH TO 2-YEAR- OLD FUNDING HEADCOUNT TASK

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General Information

Funding for 9 months to 2-year olds can only be claimed if the child has a Working Parent Code.

How do we check they are valid?

Providers should run a check on the code on the Synergy Provider Portal, by selecting the 'Eligibility Checker'. Please note that even if the code is valid and pulls back dates, you must check that the code is valid for the period concerned. The code must have a start date that is before the period it is being used for. Also, a child cannot begin funding when their code is in its grace period. This is because the grace period is there for continuity of funding.

If you have completed a check on the "Eligibility Checker" tab and the child is eligible for funding in the period you are looking to complete your headcount for, you can continue to follow the below steps:

You only need to enter children who you are claiming FEEE funding for, please do not include non-funded children on this form.

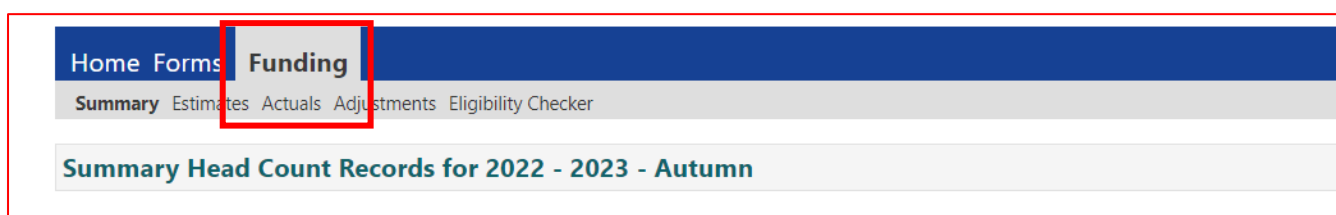
Please note you will claim for 2-year funded children and 3 and 4 year funded children on separate forms, please refer to our other guidance notes.

If a child changes their hours part way through the period or attends different hours each week you will need to make a calculation for inputting.

To do this, firstly add up the total number of hours you wish to claim for the child for the period. You will then need to divide this by the number of weeks the child will be attending. This will give you the average hours per week which needs to be entered into the 'expanded hours' box.

How to Complete the 9 Month to 2 Year Headcount Task

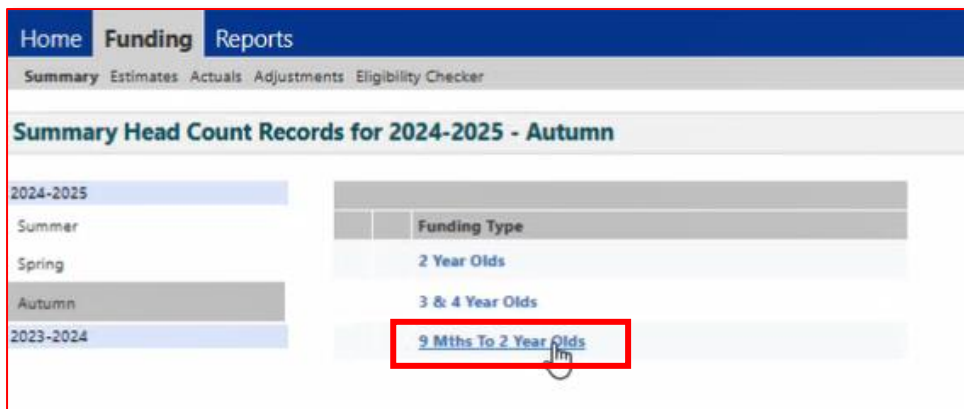
After logging in to the system, from the homepage select the Funding tab and select 'actuals'.



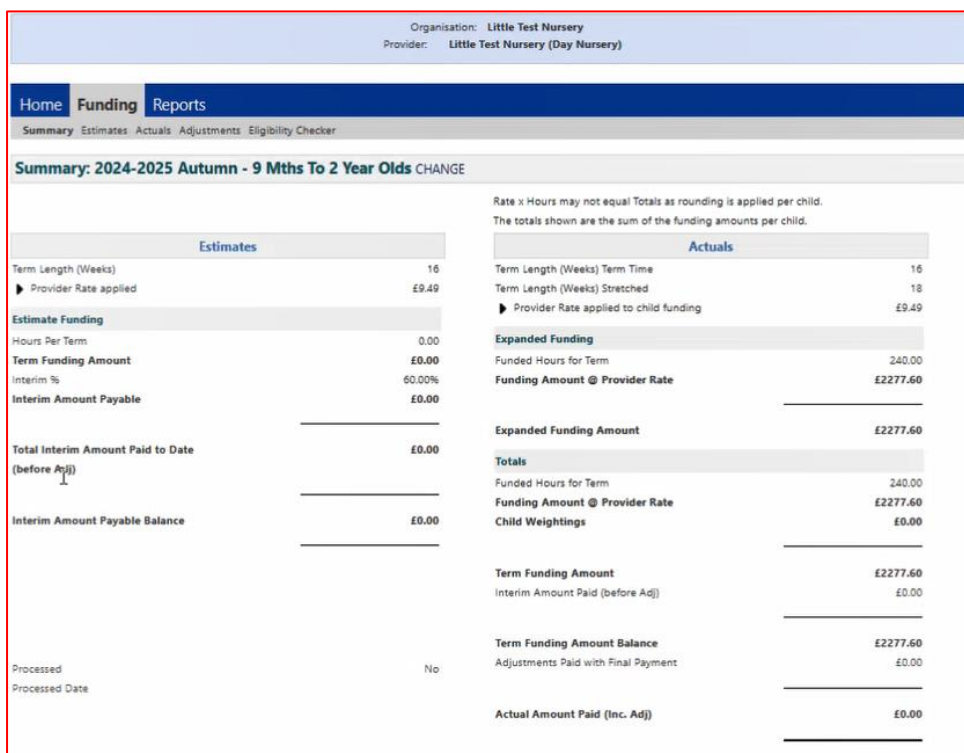
As time goes by, you will see multiple years and periods of previous and future headcounts to the left of the screen. When the current headcount is open, there will be a green paper aeroplane next to the period you need to complete. You can also refer to the FEEE calendar for the dates that the headcount task will be open.

[View the FEEE Calendar \(PDF\)](#).

To complete the 9 month to 2 year headcount task, you will need to select the academic year and current period, and select '9 Mths to 2 Year Olds' under Funding Type.



This will bring up the summary screen:

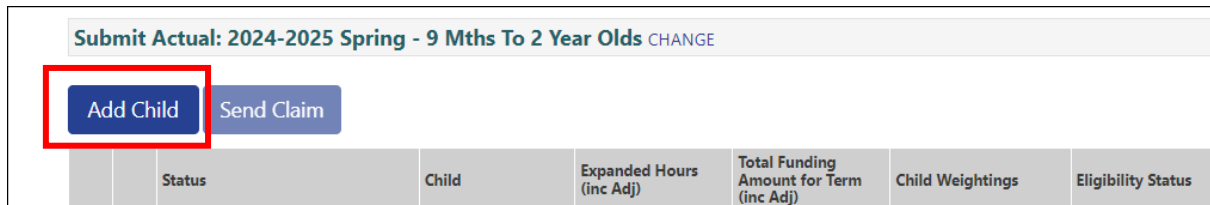


To Add a New Child

If the child is new and has a working parent eligibility code (which the parent received from the Childcare Choices website), you will need to add them.

Once added, the children should appear each time you go to complete your headcount, until the period after they turn 2 years of age. At that point you will need to remove them from this headcount and add them onto the 2-year old headcount.

To add a new child, select 'Actuals'.



You should select 'Add Child' this will open the following screen where you will need to select the 'Child Details' tab and input the following information:

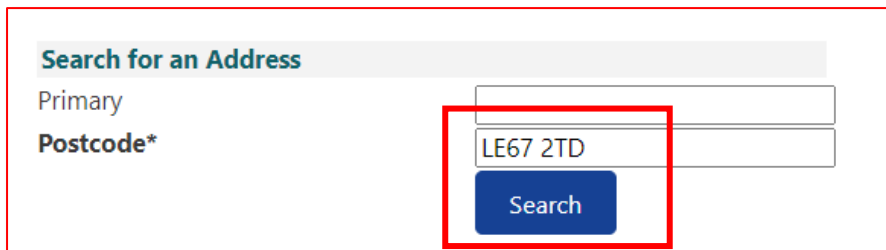
A screenshot of the 'Child Details' form. The form is divided into two main sections: 'Child Details' on the left and 'Search for an Address' on the right. The 'Child Details' section includes fields for 'Forename*' (filled with 'Jill'), 'Middle Name', 'Surname*' (filled with 'Jones'), 'DOB*', 'Proof of DOB' (checkbox), 'Gender*' (radio buttons for 'Male' and 'Female', with 'Female' selected), 'Preferred Surname', 'Ethnicity*' (dropdown menu with 'White - English' selected), and 'SEN COP Stage' (dropdown menu with 'No Special Educational Need' selected). The 'Search for an Address' section includes a 'Primary' field, a 'Postcode*' field (filled with 'LE67 2TD'), a 'Search' button, a dropdown menu showing the selected address 'Cattows Farm, Normanton Lane, Heather, Coalville, LE67 2TD', and an 'Address' section with fields for 'Address Line 1*' (filled with 'Cattows Farm'), 'Address Line 2' (filled with 'Normanton Lane'), 'Address Line 3', 'Locality', 'Town' (filled with 'Heather, Coalville'), 'County', and 'Postcode*' (filled with 'LE67 2TD'). There are 'Cancel', 'Enter Manually', and 'Confirm' buttons at the bottom of the address section. At the bottom of the form, there are 'Save' and 'Cancel' buttons and a note: '*denotes mandatory fields'.

Please ensure that all mandatory fields, which are marked by an asterisk, are completed before submission, as failure to do so will result in you not being able to submit your funding claim.

Mandatory fields which must be completed:

- **Forename** – Input child's legal name (as per their birth certificate, Passport, medical card or Adoption Certificate).
- **Surname** - Input child's legal name (as per above)
- **Date of Birth** - Input child's date of birth using the calendar that will pop up when you click on the date of birth field.

- **Gender** - Select Male or Female.
- **Ethnicity** - Please select child's ethnicity from the drop-down selection.
- **Address** - In the search for an address box, you should input the house number/name in the Primary box and input postcode in the Postcode box, and then select Search.



Search for an Address

Primary

Postcode*

LE67 2TD

Search

The address should automatically populate in the full address section below. Select 'Confirm' if it is correct.

Please note that if you do not include a house number/name, the system should give you a choice of addresses to select from, but if there are lots of houses on that road, it may not give you any options. If the address cannot be found, please enter the address manually and select 'Confirm'.

You cannot Save the record at this point. You must wait until all required fields on the other tabs have been completed.

Optional Fields

- **Proof of DOB** - We encourage providers to tick the box to confirm you have a copy of the birth certificate (or relevant documentation) and you have inputted the correct legal name as stated on the official documentation. Please retain a copy of the document as per FEEE policy.
- **Middle Name** – We encourage providers to input middle name(s)
- **Preferred Surname** - Please input if the child has another name they use.

Fields not to be changed

- **SEN COP Stage** – Please do not edit this section.

Parent/Carer Details Tab

You will need to complete this tab in order for the 'working parent code' to work. This information will also be needed if the parents give consent to have an EYPP check done.

The screenshot shows the 'Parent/Carer Details' form within the Synergy Case Management system. The form is titled 'Parent / Carer Details' and is part of the 'Funding' section. It includes fields for 'Parent / Carer Details' and 'Partner Details'. The 'Parent / Carer Details' section includes fields for Forename (Clare), Surname (Test), DOB (21-Jan-2000), Email, Contact Number, and a selection for NI or NASS Number (NI is selected). There are also checkboxes for 'Tick to give consent to Eligibility Checking for' with 'EYPP' and 'Working Family Eligibility' selected. The 'Partner Details' section includes fields for Forename, Surname, DOB, Email, Contact Number, and a selection for NI or NASS Number (none is selected). There are also checkboxes for 'Tick to give consent to Eligibility Checking for' with 'EYPP' and 'Working Family Eligibility' unselected. The form has 'Save' and 'Cancel' buttons at the bottom left. A red box highlights the 'Parent / Carer Details' tab in the navigation menu.

Organisation: Little Test Nursery
Provider: Little Test Nursery (Day Nursery)

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Child Details Parent / Carer Details Funding Details Documents Notes

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

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

Parent / Carer Details

Forename: Clare
Surname: Test
DOB: 21-Jan-2000
Email:
Contact Number:
 NI or NASS Number: JK528475A

Tick to give consent to Eligibility Checking for: EYPP Working Family Eligibility

Partner Details

Forename:
Surname:
DOB:
Email:
Contact Number:
 NI or NASS Number:

Tick to give consent to Eligibility Checking for: EYPP Working Family Eligibility

Save Cancel *denotes mandatory fields

- Complete the fields for the Forename, Surname and Date of Birth of parent/carers. You can also submit partner details if you wish.
- Select NI (National Insurance) or NASS (National Asylum Support Service) Number as appropriate and enter the information.
- Please note – the parent/carers details should be those of the parent/carers whom the working parent code application was completed on.
- For Working Parent codes the Working Family Eligibility box **MUST** be ticked.
- If the parents' consent to an EYPP check then the EYPP box should be ticked.

Funding Details Tab (Please complete to claim funded hours)

Organisation: Little Test Nursery
Provider: Little Test Nursery (Day Nursery)

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

Child Details Parent / Carer Details **Funding Details** Documents Notes

Funding Details

Start Date* 01-Sep-2024
End Date* 31-Dec-2024
Default Term Dates

Weeks Attended in Term* 16

Present during Census
Attends Two Days or More
Nominated for DAF* Yes No
Stretching Entitlement

Expanded Funded Hours per Week

Expanded Hours* 15
Eligibility Code 70031129011
Check Eligibility Code

Eligible for Expanded Hours

Attendance Days

Attends Monday Yes No
Attends Tuesday Yes No
Attends Wednesday Yes No
Attends Thursday Yes No
Attends Friday Yes No
Attends Saturday Yes No
Attends Sunday Yes No

Non-Funded Hours per Week
Non-Funded Hours*

Maximum Values Allowed:
Number of Weeks: 16
Expanded Weekly Hours: 15.00
Expanded Termly Hours: 240.00
Expanded Yearly Hours: 570.00

Save Cancel *denotes mandatory fields

This is where you need to input the hours and weeks that you wish to claim for in line with the signed PSOU (Parental Statement of Undertaking).

- **Start and End Date** boxes will be populated if you select the Default Term Dates box – this is if you are claiming for the full period. If the child starts later or finishes earlier in the period, you will need to amend the dates manually using the calendar that appears when you select the box.
- **Weeks attended in Term** - Input the number of weeks attended in the period. This should be the amount of weeks you want to claim for in the current period. Please refer to the FEEE calendar for the number of term time or stretched weeks. [View FEEE Calendar \(PDF\)](#)
- **Present during Census** - This will automatically be populated as you are requesting a claim for the child. **Please do not remove this tick.**
- **Attends two days or more** - If the child attends 2 days or more at your setting, you should tick the box. If the box is not ticked, you will not be able to claim more than 10 hours a week for that child. Please note that as per the national guidance, no more than 10 hours can be claimed in one day. By not ticking the box the system will assume that the child is attending for 1 day and no more than 10 hours per week.

- **Nominated for DAF** – mandatory so select ‘yes’ or ‘no’. If you are wanting to apply for DAF funding in the current period, you should select ‘Yes’. Please ensure that you upload a copy of the child’s PSOU form and DLA letter to the next tab called ‘Documents’ before submitting the headcount. (Please refer to the documents tab)
- **Stretching Entitlement** – tick this box if the parent is stretching their entitlement.
- **Expanded Hours** – enter the hours attending.
- **Eligibility Code** – enter the eligibility code provided by the parent. You should then select the blue box that appears below this and the system will run a check on the working parent code to inform you whether it can be used in the period.
- **Attendance Days** - This is not mandatory; however, we recommend providers to complete this section, especially in cases where a child is attending more than one setting.
- **Non-Funded Hours per Week** – this is for any additional hours that the child is attending and not claiming funding for. If the child does not attend any additional hours, as this is a mandatory box, you will need to input 0.

The red box at the bottom of the tab will show you the maximum hours that a child can claim in that period and over the year, however this is dependent on what has been claimed in previous periods.

Documents Tab (this is used to upload documents)

We advise you to upload a copy of the child's PSOU form especially if the child is attending more than one provider.

Select the ‘Upload a file’ button in the Documents tab.

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Child Details Parent/ Carer Details Funding Details **Documents** Notes

Supporting Documents
Please upload any documents which support this term.

Please enter a Description to clarify what the file contains.
Allowed file types are: All file types permitted
Files may not be larger than 100 MB.

Description*	File Name
PSOU	PSOU.docx

Upload a file

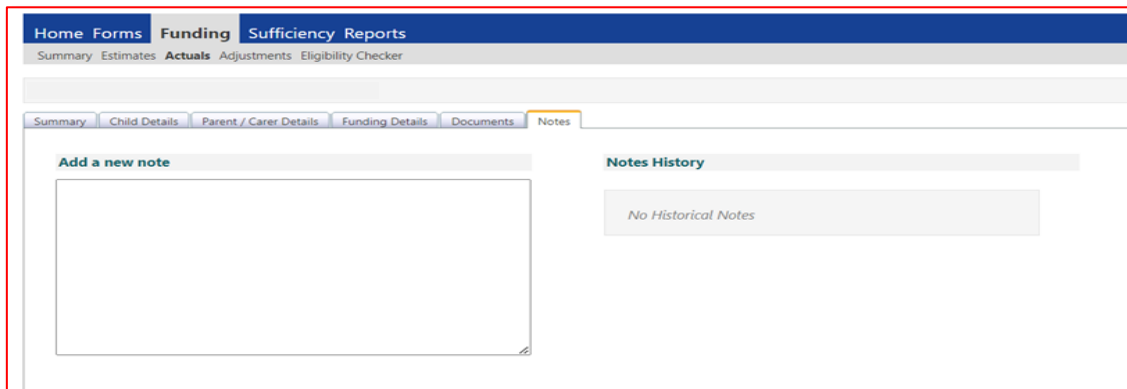
Delete

Please select relevant file and enter a description to clarify what the file contains. For example: -

- Copy of PSOU

Notes Tab (to add any additional information to support your claim)

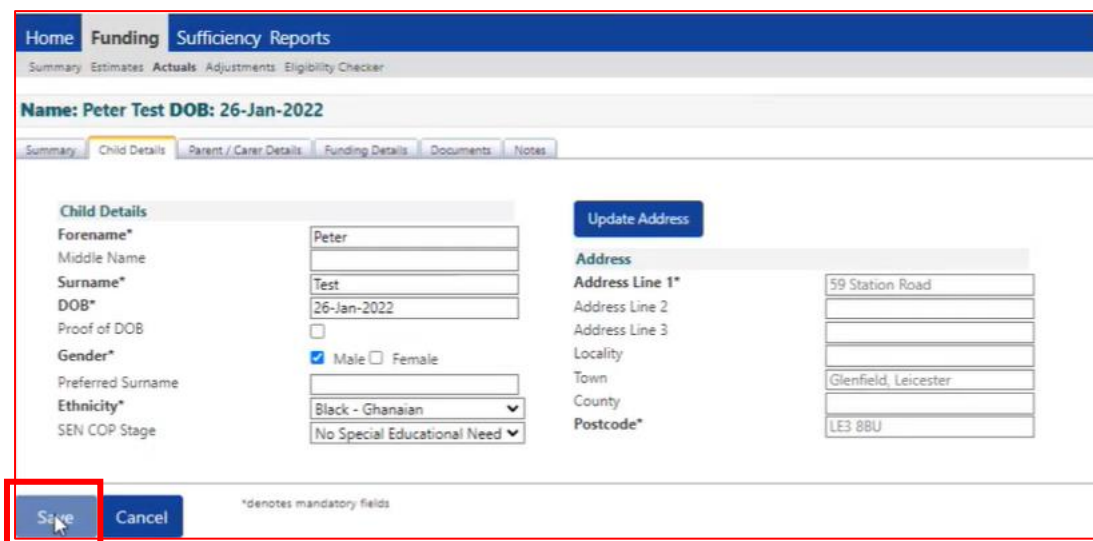
You can use this tab to add any additional information relating to the child's claim in add a new note, for example - child previously attended another provider for the first 4 weeks of the period. Any historical notes will be shown on the right-hand side.



The screenshot shows the 'Notes' tab selected in the 'Funding' section. The interface includes a navigation bar with 'Home', 'Forms', 'Funding', and 'Sufficiency Reports'. Below this, there are sub-tabs for 'Summary', 'Child Details', 'Parent / Carer Details', 'Funding Details', 'Documents', and 'Notes'. The 'Notes' tab is active, displaying an 'Add a new note' section with a large text input area and a 'Notes History' section showing 'No Historical Notes'.

Saving the Claim

Once you are happy with your claim, select the child's detail tab and select 'Save'.



The screenshot shows the 'Child Details' form for a child named Peter Test, born on 26-Jan-2022. The form includes fields for Forename, Middle Name, Surname, DOB, Proof of DOB, Gender, Preferred Surname, Ethnicity, and SEN COP Stage. There is also an 'Address' section with fields for Address Line 1, Address Line 2, Address Line 3, Locality, Town, County, and Postcode. A 'Save' button is highlighted with a red box, and a 'Cancel' button is also visible. A note at the bottom indicates '*denotes mandatory fields'.

If the claim does not save, a red banner will appear at the top of the page and a message will be shown in red near the save button, giving you reasons why it has failed – see the screenshot below. Please rectify the issues and select save again.

Save Record Failed Due To The Errors Listed Below

Child Details | Parent / Carer Details | Funding Details | Documents | Pending Adjustment | Notes

Child Details

Forename* *
 Middle Name
 Surname* *
 DOB* *
 Proof of DOB
 Gender* Male Female *
 Preferred Surname
 Ethnicity* *
 SEN COP Stage

Search for an Address

Primary
 Postcode*

Address

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

The following errors need to be fixed before the record can be saved:
 Forename must be entered (Child Details Tab)
 Surname must be entered (Child Details Tab)
 DOB must be entered (Child Details Tab)
 Gender must be entered (Child Details Tab)
 Ethnicity: Value cannot be '<unknown>' (Child Details Tab)
 Address Line 1 must be entered (Child Details Tab)
 Postcode must be entered (Child Details Tab)
 Term Start Date must be entered (Funding Details Tab)
 Term End Date must be entered (Funding Details Tab)
 Nominated for DAF must be entered (Funding Details Tab)

*denotes mandatory fields

You will need to repeat the above process for every child you wish to claim funding for.

Please note that if you navigate away from the page before saving, any changes will be lost.

Submitting Claim

Once all children have been added, you can submit your claim by selecting 'Send Claim'.

Organisation: Little Test Nursery
 Provider: Little Test Nursery (Day Nursery)

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Submit Actual: 2024-2025 Autumn - 9 Mths To 2 Year Olds CHANGE

Status	Child	Expanded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
	Test, Edward (12-May-2023)	240.00	£2277.60		29-Jul-2024 - 27-Oct-2024 Grace Period: 07-Nov-2024
	Test, Elliot (02-Dec-2022)	240.00	£2277.60		24-Jul-2024 - 22-Oct-2024 Grace Period: 03-Nov-2024

You will receive a note to say the submission was successful:

Organisation: Little Test Nursery
Provider: Little Test Nursery (Day Nursery)

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Submission Successful

Submit Actual: 2024-2025 Autumn - 9 Mths To 2 Year Olds CHANGE

Add Child Send Claim

	Status	Child	Expanded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
!	New, Awaiting LA Download	Test, Edward (12-May-2023)	240.00	£2277.60		29-Jul-2024 - 27-Oct-2024 Grace Period: 07-Nov-2024
X		Test, Elliot (02-Dec-2022)	240.00	£2277.60		24-Jul-2024 - 22-Oct-2024 Grace Period: 03-Nov-2024

Add Child Send Claim

If you have made changes but not submitted the form, a red exclamation will appear next to the children informing you that there is unsubmitted data. To rectify this, you can select Send Claim.

	Status	Child	Universal Hours (inc Adj)
!	New, Unsubmitted Child	Bravo, Bill (24-Aug-2019)	10.00
!	New, Unsubmitted Child	Jones, Bill (01-Aug-2019)	10.00
!	New, Unsubmitted Child	Jones, Jill (01-Aug-2019)	10.00

Add Child **Send Claim**

If any child's record has not been submitted, you will have a notification on the home page.

These records have been edited but not yet claimed.

! There are unsubmitted child funding records for Provider: [Redacted] - Childminder

- 2024-2025 Spring - 2 Year Olds (3 unsubmitted, 0 rejected)
- 2024-2025 Spring - 3 & 4 Year Olds (3 unsubmitted, 0 rejected)
- 2024-2025 Spring - 9 Mths To 2 Year Olds (3 unsubmitted, 0 rejected)**

Resubmitting a Claim

You can resubmit the task multiple times whilst open. Please only submit once per day to allow the system to catch up on changes. The form can be overwritten by changes and additions.

To resubmit a claim, select send claim.

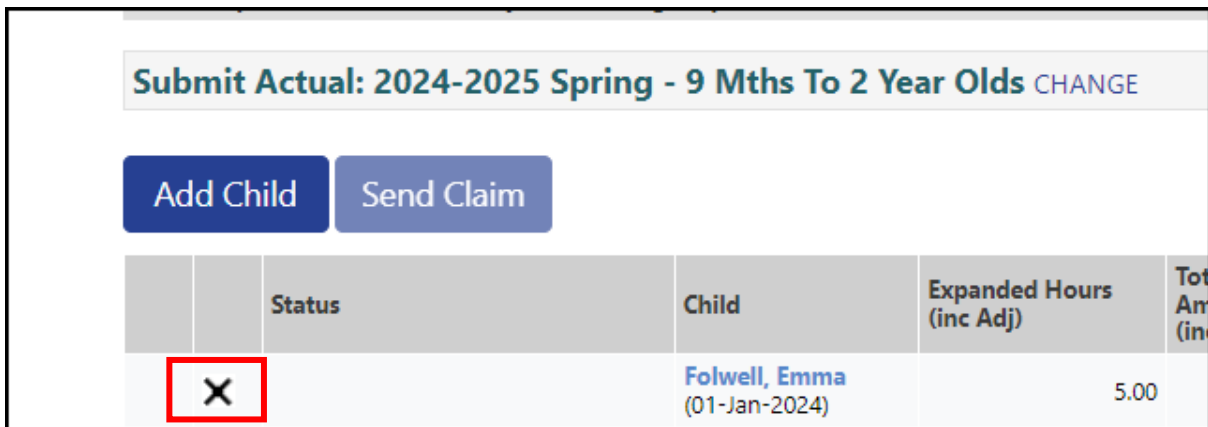
Amending an Existing Child's Record

Select the child that you want to update and then follow the process above, (making sure that all the mandatory fields are completed. (Please note that existing children will have some fields automatically populated. These fields are only to be amended, if the child's circumstances have changed, i.e. changed address.)

Once all tabs have been checked/updated please select save.

How to Delete a Child

If there is a child on your headcount that you no longer wish to claim for in the current period, press the 'X' that appears on the left-hand side of the child. This will then say 'awaiting LA delection' in the status box. This is fine, it means the LA hasn't yet deleted the claim.



The screenshot shows a web interface for managing claims. At the top, there is a header bar with the text "Submit Actual: 2024-2025 Spring - 9 Mths To 2 Year Olds" and a "CHANGE" link. Below this are two buttons: "Add Child" and "Send Claim". The main content is a table with the following columns: "Status", "Child", "Expanded Hours (inc Adj)", and "Tot Am (in". The first row of data shows a red box around an "X" icon in the "Status" column, with the child's name "Folwell, Emma" and start date "(01-Jan-2024)" in the "Child" column, and "5.00" in the "Expanded Hours (inc Adj)" column.

Status	Child	Expanded Hours (inc Adj)	Tot Am (in
X	Folwell, Emma (01-Jan-2024)	5.00	

Summary

You can view the funding you are due to receive by selecting the relevant period. Please note - you will be able to view any changes we are making during the data cleansing, however, we suggest you do not check here until we have emailed you to confirm that we have finalised the payment run. We may make amendments right up until a couple of days before the payment is due to be made to yourselves.

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Summary: 2024-2025 Spring - 9 Mths To 2 Year Olds CHANGE	
Rate x Hours may not equal Totals as rounding is applied per child. The totals shown are the sum of the funding amounts per child.	
Estimates	
Term Length (Weeks)	16
▶ Provider Rate applied	£9.49
Estimate Funding	
Hours Per Term	0.00
Term Funding Amount	£0.00
Interim %	60.00%
Interim Amount Payable	£0.00
<hr/>	
Total Interim Amount Paid to Date (before Adj)	£0.00
<hr/>	
Interim Amount Payable Balance	£0.00
<hr/>	
Processed	Yes
Processed Date	05-Aug-2024
Actuals	
Term Length (Weeks) Term Time	16
Term Length (Weeks) Stretched	18
▶ Provider Rate applied to child funding	£9.49
Expanded Funding	
Funded Hours for Term	796.82
Funding Amount @ Provider Rate	£7561.82
▶ Child Weightings Total	£34.36
<hr/>	
Expanded Funding Amount	£7596.18
Totals	
Funded Hours for Term	796.82
Funding Amount @ Provider Rate	£7561.82
Child Weightings	£34.36
<hr/>	
Term Funding Amount	£7596.18
Interim Amount Paid (before Adj)	£0.00
<hr/>	
Term Funding Amount Balance	£7596.18
Adjustments Paid with Final Payment	£0.00
<hr/>	
Actual Amount Paid (Inc. Adj)	£0.00
<hr/>	

In this tab you can view an overview of your payments.

In the Estimates column you can view the total amount of paid upfront (initial payment).

Estimates	
Term Length (Weeks)	12
▶ Provider Rate applied	£5.27
Estimate Funding	
Hours Per Term	200.00
Term Funding Amount	£1054.00
Interim %	100.00%
Interim Amount Payable	£1054.00
<hr/>	
Total Interim Amount Paid to Date (before Adj)	£1054.00
<hr/>	
Interim Amount Payable Balance	£0.00
<hr/>	
Processed	Yes
Processed Date	16-Jan-2023

In the **Actuals column** it will overview your payments in more detail. This payment will still not reach your bank account until the final payment date specified on the FEEE calendar. [View FEEE Calendar \(PDF\)](#) If the summary page states processed, this is the final calculations.

Rate x Hours may not equal Totals as rounding is applied per child.
The totals shown are the sum of the funding amounts per child.

Actuals	
Term Length (Weeks) Term Time	16
Term Length (Weeks) Stretched	18
▶ Provider Rate applied to child funding	£9.49
Expanded Funding	
Funded Hours for Term	796.82
Funding Amount @ Provider Rate	£7561.82
▶ Child Weightings Total	£34.36
Expanded Funding Amount	£7596.18
Totals	
Funded Hours for Term	796.82
Funding Amount @ Provider Rate	£7561.82
Child Weightings	£34.36
Term Funding Amount	£7596.18
Interim Amount Paid (before Adj)	£0.00
Term Funding Amount Balance	£7596.18
Adjustments Paid with Final Payment	£0.00
Actual Amount Paid (Inc. Adj)	£0.00
Processed	No
Processed Date	

Actuals Tab

The Actuals tab will identify a pre-populated list of children that have been carried forward from the previous period who are age eligible for the current period and this will be what you use to complete your headcount task. Please note if you have not claimed before the table will be blank.

Submit Actual: 2024-2025 Spring - 9 Mths To 2 Year Olds CHANGE					
Add Child		Send Claim			
	Status	Child	Expanded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Wei
✘		Folwell, Emma (01-Jan-2024)	5.00	£957.65	LDEP
✘		Jones, Bob (01-Jan-2024)	144.90	£2290.90	LDEP

To be able to view a summary of the child’s funding, select their name and you will see the following screenshot:

Name: Emma Folwell DOB: 01-Jan-2024	
Term Start Date	01-Jan-2025
Term End Date	08-Jan-2025
No of weeks attended	1
Nominated for DAF	Yes
Eligibility Start Date	31-Dec-2024
Eligibility End Date	31-Mar-2025
Grace Period End Date	29-Jun-2025
Eligibility last checked	30-Jul-2024 15:38:02
Provider Total Rate	£9.49
Expanded Funding	
Funded Hours Per Week	5.00
Funded Hours for Term	5.00
Funding Amount @ Provider Rate	£47.45
Child Weightings	£0.20
Expanded Funding Amount	£47.65
Totals	
Funded Hours Per Week	5.00
Funded Hours for Term	5.00
Total Funding (excl. Adj)	£47.65
Total amount from Adjustments	£910.00
Total amount from Pending Adjustments	£0.00
Total Funding For Term (inc Adj)	£957.65

Adjustments Tab

Please refer to separate guidance on adjustments.