Dudley FIS Provider Portal – Funding

Quick Access/Usage Guide

Provided by Servelec Synergy for Dudley Council

Version 1

Written by Dudley Council Childcare Strategy Team

July 2016
1. Quick Access – Logging In


2. Type in your username and password as shown below

3. Click on the ‘Sign In’ button to log into the portal
2. Quick Access – Estimates Submission

1. Click on Funding

2. Click on Estimates

3. Select the ‘Open’ against the funding type you are submitting for

<table>
<thead>
<tr>
<th>Estimates</th>
<th>Year</th>
<th>Term</th>
<th>Funding Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>2016/17</td>
<td>Summer</td>
<td>Ef 4 Yrs 2016/17</td>
</tr>
<tr>
<td>Open</td>
<td>2016/17</td>
<td>Summer</td>
<td>Time For Two’s 2016/17</td>
</tr>
<tr>
<td>View</td>
<td>2015/16</td>
<td>Spring</td>
<td>Ef 4 Yrs 2015/16</td>
</tr>
</tbody>
</table>

4. Fill in the Estimate Number of Funded Hours Per Week for this Term box

5. Click on ‘Calculate’

6. If you are happy with the claim then click on the ‘Send Claim’ button

7. This will then submit your estimate to the Childcare Strategy team

**Important Note for the Provider on Resubmissions.....** While the portal remains open for estimate submission, you can send estimates in as many times as you like. For example, if you sent 100hrs worth in and you need to add another 10hrs to make 110hrs then you can repeat the submission process above thus your new submission would be 110hrs and not the additional 10hrs. The Childcare Strategy team will only approve the latest submission.
3. Quick Access – Actual Submission

**Important Note for the Provider on Actuals.....** The funding hours will be all set to 0 for all your actuals. You will need to go in and enter the hours attended against each child on your actual list. This quality assures the data you are sending as well as the accuracy of your claim.

1. Click on Funding
2. Click on Actuals
3. Select the ‘Open’ against the funding type you are submitting for

<table>
<thead>
<tr>
<th>Actuals</th>
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</tr>
</tbody>
</table>

4. You can Edit, Add or Delete a child on your Actual

5. **Edit** – by clicking on ‘Edit’, you can amend the childs details where applicable within the:
   a. **Child Detail tab**– i.e. amend the address or ethnicity etc
   b. **Funding Details tab** – you need to enter the Funded Hours Per Week and if they are receiving any Non-Funded Hours Per Week
   c. Ensure that you ‘Save’ the record
6. Against the Edited child the status will change to ‘Edit Pending’

<table>
<thead>
<tr>
<th>Status</th>
<th>Child Name</th>
<th>Date of Birth</th>
<th>Funded Hours for Term</th>
<th>Child Weightings</th>
<th>Last ECS Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Pending</td>
<td>Farnell, Donna</td>
<td>26-Nov-2012</td>
<td>0.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. **Add** – by clicking on ‘Add’, you can add a child to your actuals
   a. **Child Detail tab** – fill in all the details on this page where you have information for and ensure the mandatory fields are completed.
   b. **Funding Details tab** – ensure you click on ‘Default Term Dates’. You need to enter the Funded Hours Per Week and if they are receiving any Non-Funded Hours Per Week

8. Against the Added child the status will change to ‘Edit Pending’

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<th>Funded Hours for Term</th>
<th>Child Weightings</th>
<th>Last ECS Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Pending</td>
<td>Person, Test</td>
<td>02-Jan-2013</td>
<td>180.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. **Delete** – by clicking on ‘Delete’, you can delete a child to your Actuals i.e. because he/she does not attend the provision. If you click on delete you will get the following

10. By clicking on ‘Yes’ the Delete will change to ‘Request Delete’
11. Click on ‘Request Delete’ and you will see the following:

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

[Yes] [No]

12. By clicking on ‘Yes’ the Delete will automatically be submitted

13. If you are happy with the actual then click on the ‘Send Claim’ button

14. This will then submit your estimate to the Childcare Strategy team