

Section 13 – Provider Portal Reports

Provider Portal Reports enables you to run a set of pre-defined reports created by the Funding Team, for a specific headcount.

There are currently five reports available to view:

1. Adjustment Summary
2. EYPP Summary
3. Funding Actuals summary
4. Termly Breakdown Summary
5. 30 Hour Summary

1. Adjustment Summary

This provides details of all submitted adjustments for each child showing hours, funding amount, EYPP and DAF for the term you have selected

2. EYPP Summary

This report shows all 3/4 year old children that you have included for EYPP checks. It provides all the results of the Electronic Checking Service (ECS) check for the term, you have selected. This will include any 'Not Found' results with a qualifier, which will require further action. Run this report once you have received your 'Submission Successful' email to enable you to identify and action any children marked as Not Found with a 'Qualifier'. Please refer to the **Electronic Checking Service (ECS) Qualifiers for EYPP** for further guidance

3. Funding Actuals Summary

A summary of all children included in your funding actuals (headcount) which follows the input screens of your Provider Portal. This report enables you to review all the information you have input for each child for the term you have selected. This will enable you to quickly identify any errors without opening each individual child record

4. Termly Funding breakdown

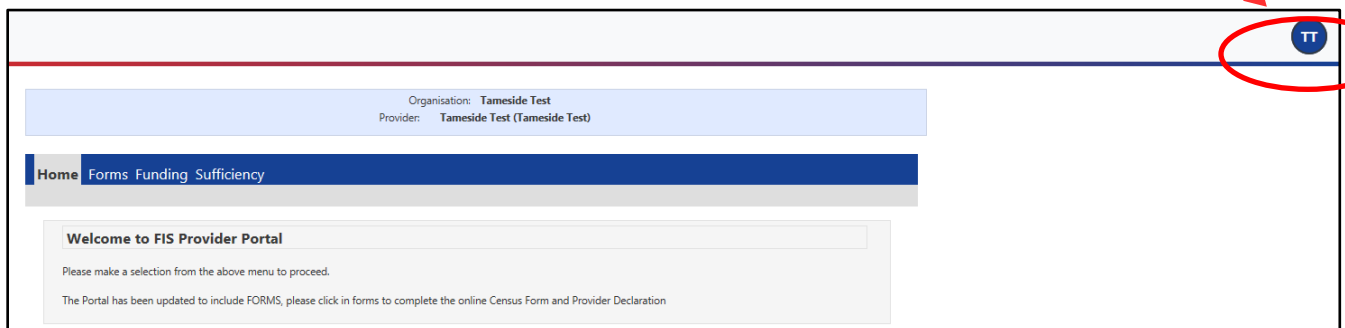
A complete financial summary for each child showing hours claimed, funding amount, and EYPP for the term you have selected. This report does not include adjustments submitted after the Funding Actuals have closed. Please refer to the **Adjustment Summary** report for further details

5. 30 Hour Summary

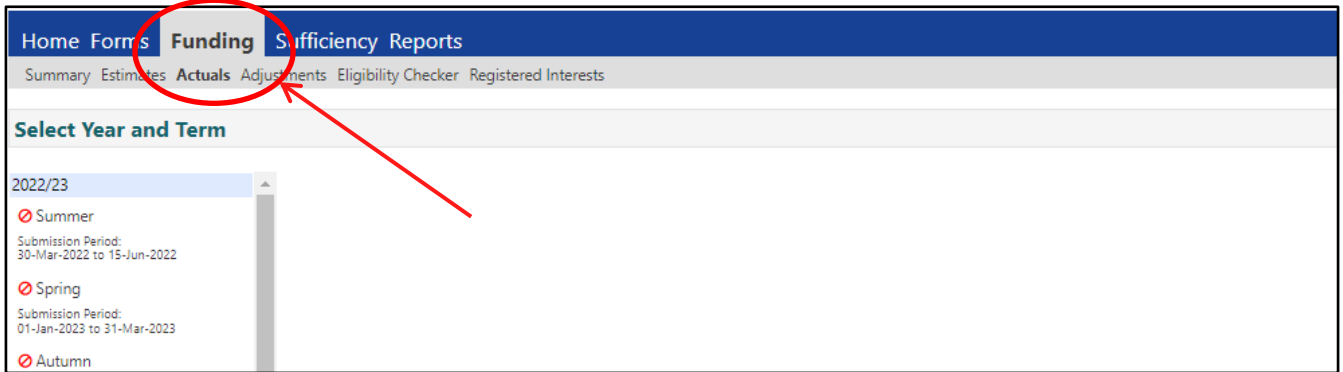
A summary of all children with 30 hours, details of their codes, code start and end dates and grace period end dates.

A – Running Reports

1. Log in to the Synergy FIS Provider Portal



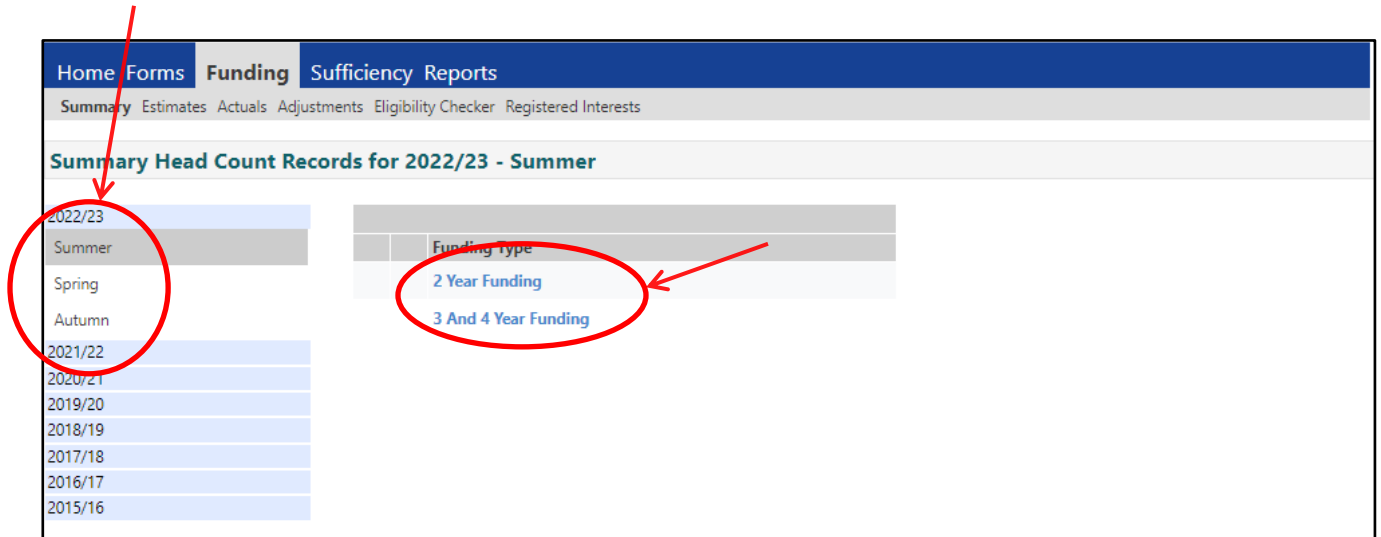
2. Select the **Funding** tab from the top of the page



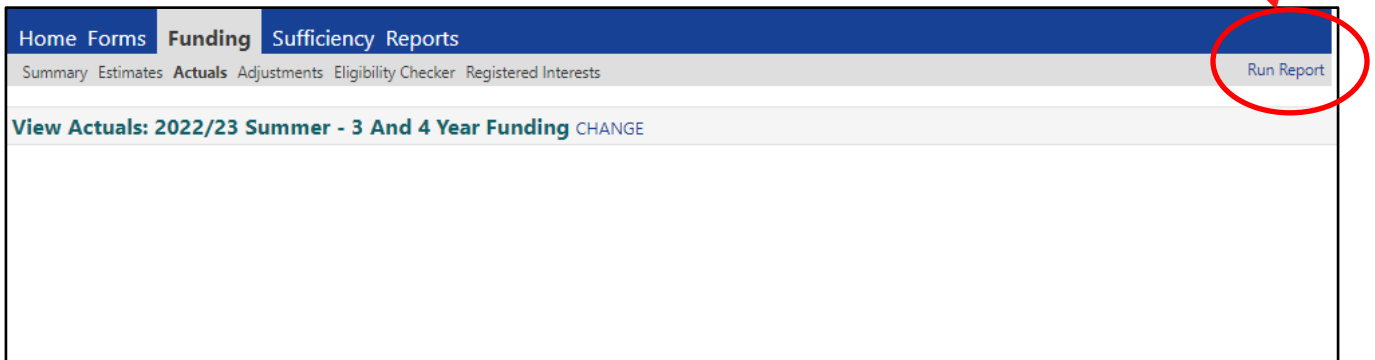
3. The reports can be run from any of the following tabs :

- Summary
- Estimates
- Actuals
- Adjustments

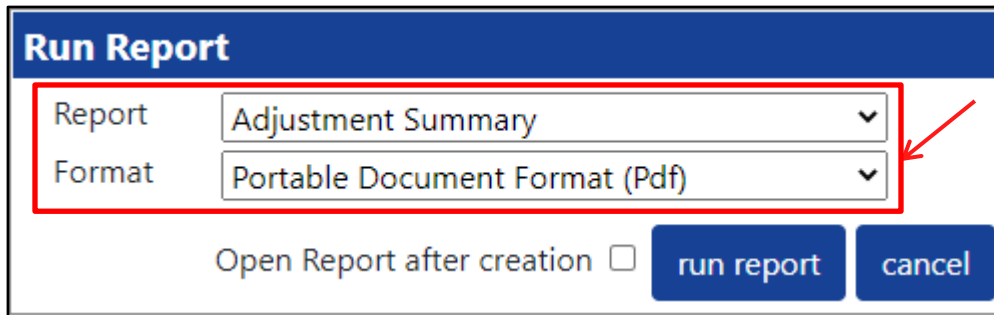
4. Select the required Year, Term and age range



5. Click **Run Report** , which is located at the top right of your portal screen



6. The **Run Report** box will appear



Run Report

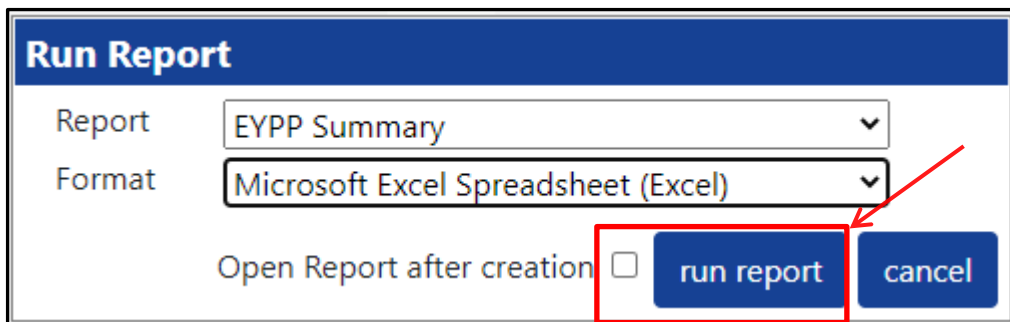
Report: Adjustment Summary

Format: Portable Document Format (Pdf)

Open Report after creation

run report cancel

7. Select the required report from the drop down list
8. Select the report format from the drop down list. We recommend using Microsoft Excel to enable you to add filters, and sort your data and add totals, however there are many other options including PDF to choose from
9. Click the **Open Report after creation** checkbox and then the **Run Report** button



Run Report

Report: EYPP Summary

Format: Microsoft Excel Spreadsheet (Excel)

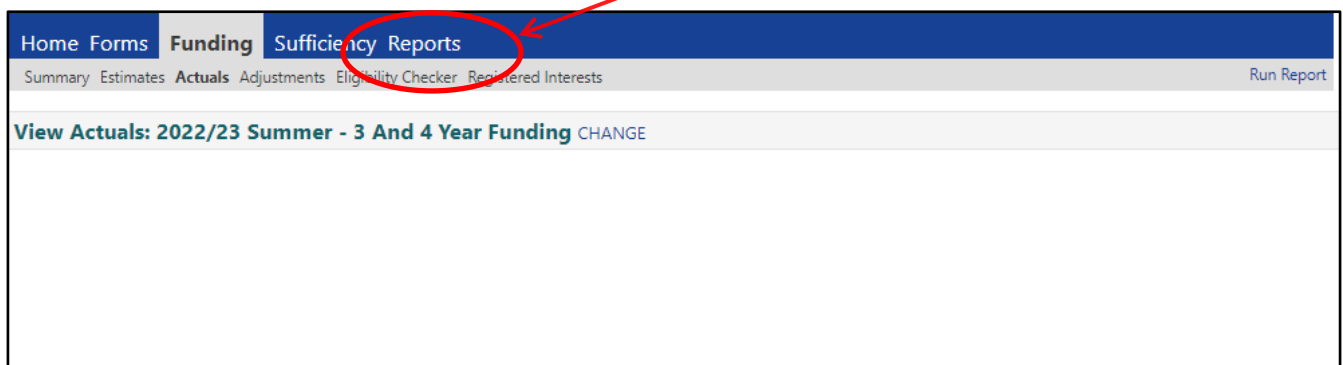
Open Report after creation

run report cancel

10. You can now view and save your report if required. The report will automatically save in the Report history and can be accessed again from there if required

B – Report History - View Previously Run Reports

1. Select the **Reports** tab at the top of your screen



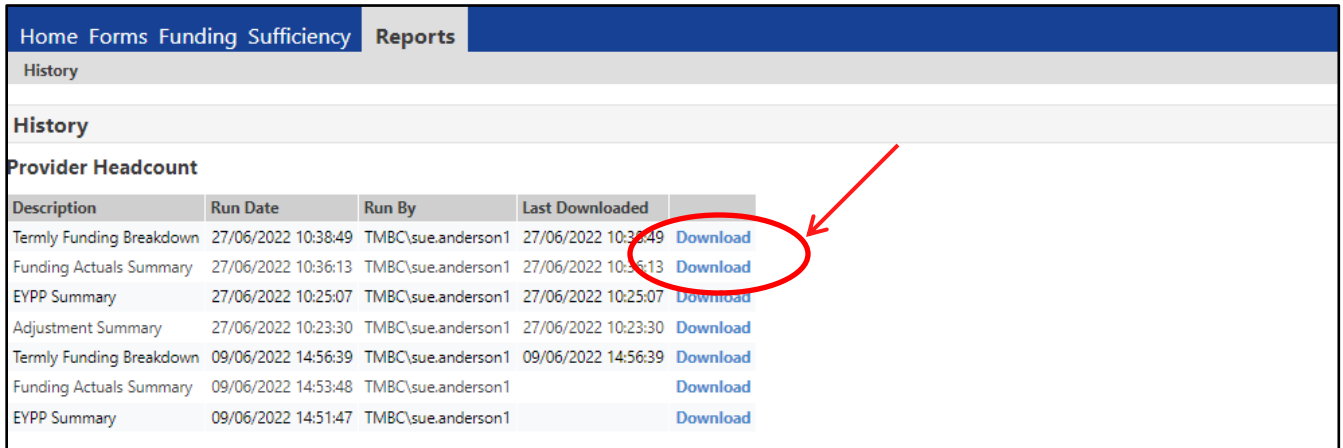
Home Forms Funding **Sufficiency Reports** Run Report

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

View Actuals: 2022/23 Summer - 3 And 4 Year Funding CHANGE

2. A history of previously requested reports will be shown detailing the name of the report, the date and time it was run and who ran the report

3. If you would like to re-run a report, select the required report from the list and click **Download**



The screenshot shows a web application interface with a blue header bar containing navigation links: Home, Forms, Funding, Sufficiency, and Reports. Below the header is a 'History' section. The main content area is titled 'Provider Headcount' and contains a table with the following data:

Description	Run Date	Run By	Last Downloaded	
Termly Funding Breakdown	27/06/2022 10:38:49	TMBC\sue.anderson1	27/06/2022 10:38:49	Download
Funding Actuals Summary	27/06/2022 10:36:13	TMBC\sue.anderson1	27/06/2022 10:36:13	Download
EYPP Summary	27/06/2022 10:25:07	TMBC\sue.anderson1	27/06/2022 10:25:07	Download
Adjustment Summary	27/06/2022 10:23:30	TMBC\sue.anderson1	27/06/2022 10:23:30	Download
Termly Funding Breakdown	09/06/2022 14:56:39	TMBC\sue.anderson1	09/06/2022 14:56:39	Download
Funding Actuals Summary	09/06/2022 14:53:48	TMBC\sue.anderson1		Download
EYPP Summary	09/06/2022 14:51:47	TMBC\sue.anderson1		Download

A red circle highlights the 'Download' link in the first row, with a red arrow pointing to it from the right.

4. The report will open in the original format selected

5. You can now view your report

6. Log out