

## Section 3 – Eligibility Codes

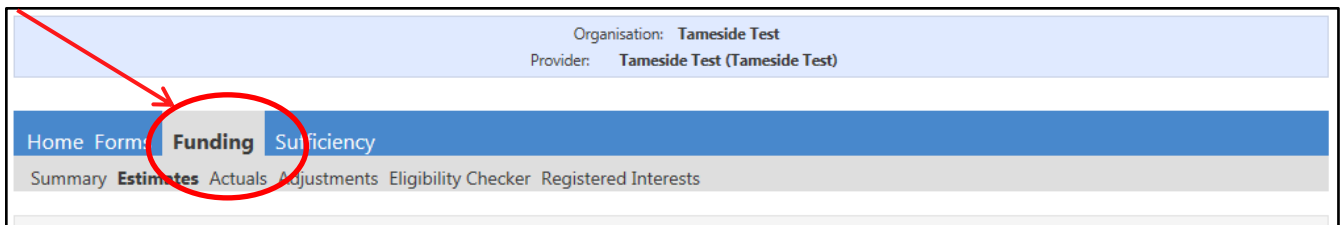
### A - Stand Alone Eligibility check

This enables you to check the 11 digit eligibility codes issued by HMRC for the Working Family Entitlement, prior to agreeing a funded place and completing and submitting your termly Headcount

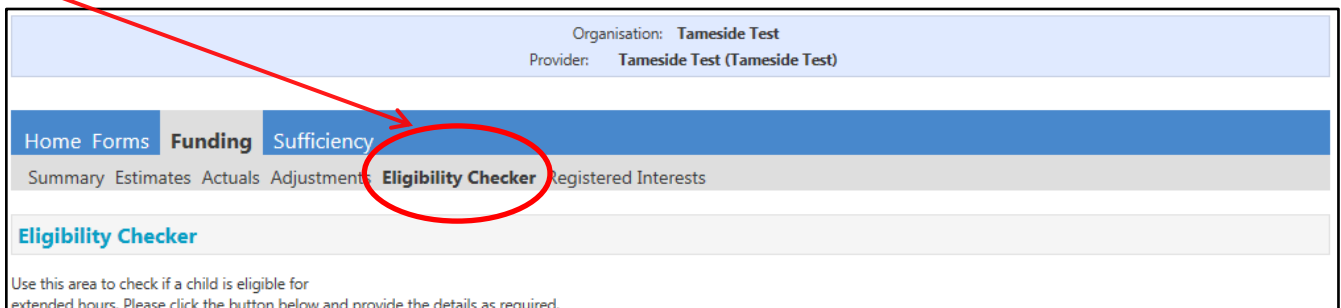
#### **Important Note:**

**Please ENSURE the parent has fully completed and signed the Parental Agreement Funding Claim form. Please do not perform an eligibility check without a fully completed and signed agreement to ensure you do not breach Data Protection rules.**

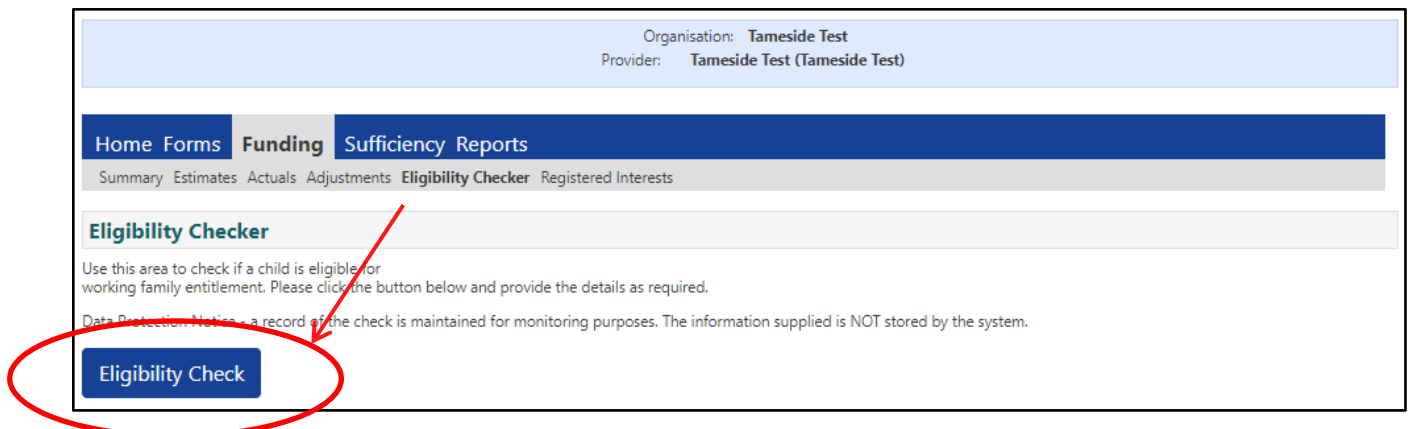
1. Log in to the Synergy FIS Provider Portal
2. Select the Funding tab from the top of the page



3. Select Eligibility Checker to carry out an eligibility check



4. Click the Eligibility Check Button



5. Input the required information and click Submit. Only one set of parent / carer information is required. All fields marked with an asterisk are mandatory

## Eligibility Check

Please enter a valid Eligibility Code and Child Date of Birth, together with Parent/Carer Details. Partner Details are optional but if entered then all fields, except Forename, must be filled in.

Eligibility Code*	<input style="width: 90%; height: 20px;" type="text"/>
Child Date of Birth*	<input style="width: 90%; height: 20px;" type="text"/>
Parent/Carer Forename	<input style="width: 90%; height: 20px;" type="text"/>
Parent/Carer Surname	<input style="width: 90%; height: 20px;" type="text"/>
Parent/Carer NI Number*	<input style="width: 90%; height: 20px;" type="text"/>
Consent must be given for this	<input type="checkbox"/> Eligibility Check
Partner Forename	<input style="width: 90%; height: 20px;" type="text"/>
Partner Surname	<input style="width: 90%; height: 20px;" type="text"/>
Partner NI Number	<input style="width: 90%; height: 20px;" type="text"/>

\*denotes mandatory fields

SubmitCancel

6. If the Eligibility Code is valid you will receive the following:

Home Forms Funding Sufficiency Reports

Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests

The details provided have been found:

Eligibility Code: 25590531452  
Code Start Date: 15-Feb-2024  
Code End Date: 09-Jul-2024  
Grace Period End Date: 31-Aug-2024

### Eligibility Checker

Use this area to check if a child is eligible for extended hours. Please click the button below and provide the details as required.

Data Protection Notice - a record of the check is maintained for monitoring purposes. The information supplied is NOT stored by the system.

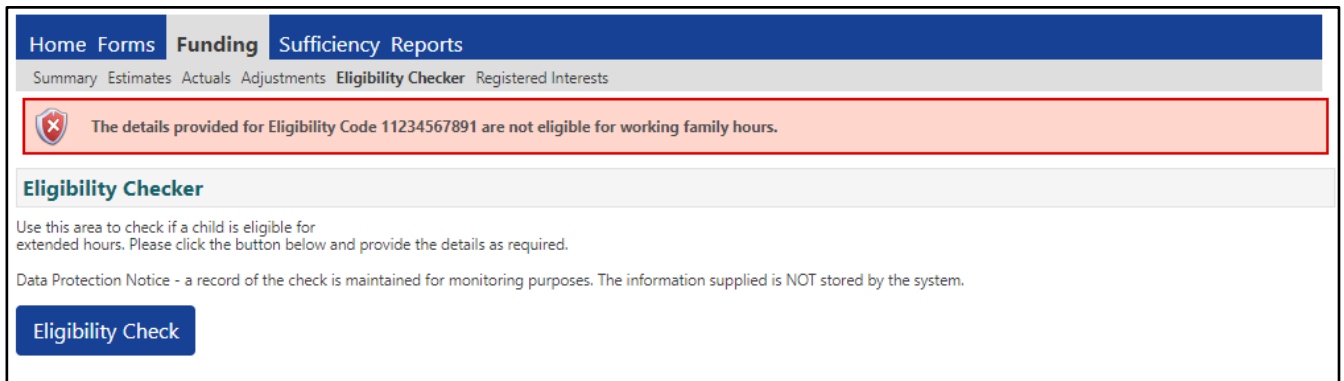
Eligibility Check

7. The response will detail the Code Start and End Date and the Grace Period End Date. You should make a note of this information for future reference

Please note the deadline for applications for each term below:

Child's birthday on or between:	To start your Working Family Entitlement place from:	Parents must apply and receive a valid code on or before:
1 <sup>st</sup> April and 31 <sup>st</sup> August	Term starting on or after 1 <sup>st</sup> September	31 <sup>st</sup> August
1 <sup>st</sup> September and 31 <sup>st</sup> December	Term starting on or after 1 <sup>st</sup> January	31 <sup>st</sup> December
1 <sup>st</sup> January and 31 <sup>st</sup> March	Term starting on or after 1 <sup>st</sup> April	31 <sup>st</sup> March

8. If the Eligibility Code is invalid you will receive the following message, **do not** offer Working Family Entitlement for the child



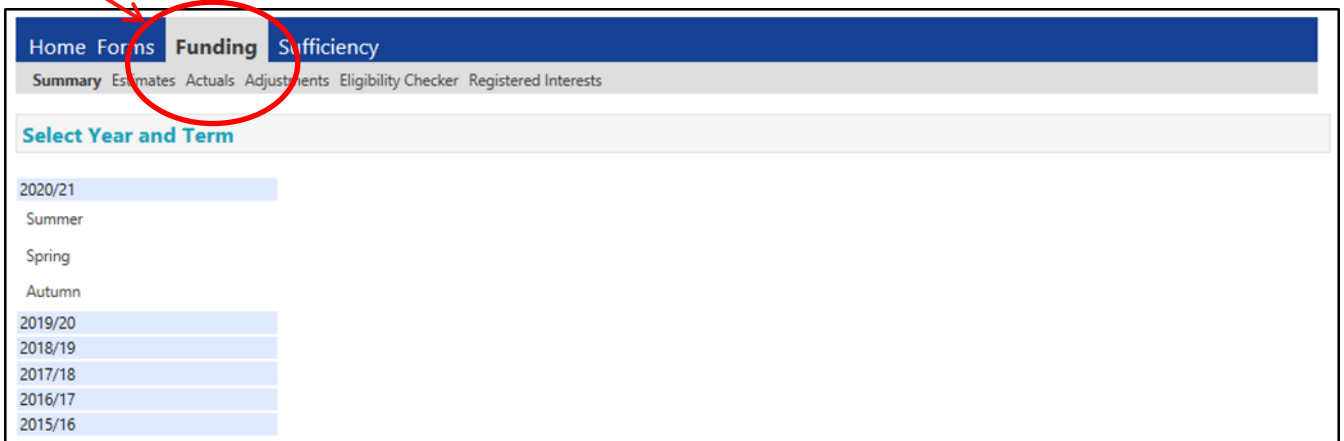
The screenshot shows a web interface with a navigation bar containing 'Home', 'Forms', 'Funding', and 'Sufficiency Reports'. Below the navigation bar are links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. A red-bordered box highlights an error message: 'The details provided for Eligibility Code 11234567891 are not eligible for working family hours.' Below this is the 'Eligibility Checker' section, which includes instructions on how to use the area and a 'Data Protection Notice'. At the bottom of this section is a blue button labeled 'Eligibility Check'.

9. Once you have completed all of your 'Eligibility checks' – Sign Out

## **B – Working Family Entitlement Audit Checks**

The Funding Team are required to carry out audits of all Working Family Entitlement eligibility codes that have been imported into the system at six points in the year (at the start of term and mid-term). All providers are notified by email once the audit has been carried out and should take the following actions as soon as possible:

1. Log in to the Synergy FIS Provider Portal
2. Select the Funding tab from the top of the page and then select Actuals



The screenshot shows the Synergy FIS Provider Portal interface. The navigation bar at the top has 'Home', 'Forms', 'Funding', and 'Sufficiency' tabs. The 'Funding' tab is highlighted with a red circle and a red arrow pointing to it. Below the navigation bar are links for 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. The main content area is titled 'Select Year and Term' and contains a list of years and terms: 2020/21 (Summer, Spring, Autumn), 2019/20, 2018/19, 2017/18, 2016/17, and 2015/16.

3. Select the Year / Term and the age range you Funding that you are checking:

Actuals Head Count Records for 2020/21 - Autumn

	Funding Type	Office use only	
		Ready To Process	Processed
2 Year Funding		✓	✓
3 And 4 Year Funding		✓	✓

4. Check the list of children for the following:

- A Yellow warning triangle – any child with a yellow warning triangle against their name has now entered or is close to entering their grace period, unless the eligibility code is renewed, funding will cease in accordance with the grace period end date. This will either be due to the parent not renewing their eligibility code with HMRC or they have renewed their code and they are no longer eligible
- A child with extended or expanded hours recorded and the Eligibility Status column is now blank – this means that the details are not matched or the entitlement is no longer valid.

View Actuals: 2020/21 Autumn - 3 And 4 Year Funding CHANGE

⚠ In 30H grace period

Child	Universal Hours (inc Adj)	Extended Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	Eligibility Status
⚠ Bell, Tinker (02-Mar-2017)	225.00	135.00	£1530.00		06-Jan-2020 - 07-Oct-2020 Grace Period: 31-Dec-2020
Bunny, Bugs (11-May-2017)	225.00	0.00	£1075.50	EYPP	
Duck, Donald (03-Mar-2017)	225.00	0.00	£1571.25		
Mouse, Mickey (03-Mar-2017)	75.00	0.00	£318.75		
⚠ Mouse, Mini (21-Dec-2016)	225.00	135.00	£1530.00		15-Sep-2019 - 19-Sep-2020 Grace Period: 31-Dec-2020

5. Contact the parents of all children affected as soon as possible and encourage them to log onto their Gateway Account with HMRC to reconfirm their details.

### 2 Year Funding – Working Family Entitlement

Where children have fallen out of eligibility and their grace period end date has passed, you should advise the parents that funding will cease on the Grace Period end Date.

Providers should make parents aware of the Disadvantaged 2 year old entitlement and encourage them to check their eligibility for this entitlement.

**Please note** - Falling out of eligibility for the Working Family Entitlement will not necessarily make a 2 year old child eligible for the Disadvantaged Entitlement.

### **3 and 4 Year Funding**

Where children have fallen out of eligibility for the extended hours and their grace period end date has passed, you should discuss this with the parents and arrange to alter their entitlement back to Universal hours only. It is anticipated that the number of these cases will be minimal

6. Prior to the start of the new term, recheck the codes for any children with a yellow warning triangle to ensure that the code has been successfully renewed before they commence their place

7. Sign out

**Please note** - Parents issued with Temporary codes should contact HMRC to ensure they receive a permanent code in order for funding to continue. Parents who are experiencing technical problems when reconfirming their codes should be directed back to HMRC on 0300 1234097

## **C - Provider Portal Report – Working Family Entitlement Summary**

**For full details on how to access Provider Portal Reports, please refer to Section 13**

A report is available to run from your Provider Portal. It will provide you with a summary of all children with extended or expanded hours that have been included on your headcount. The report will show details of their code, code start date and end dates and grace period end dates. The report will also provide the date and result of the latest audit check.