access

Synergy education management system

Synergy Free Entitlement Data Collection
HOW TO USE 'DOCUMENT UPLOAD'

QUICK LEARN GUIDE

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Hackney

Getting Started with Synergy Document Upload
About this Quick Learning Guide

This guide is available for childcare providers wanting to upload eligibility evidence for two year olds from another Local Authority, or to upload DLA award letters for three or four year olds eligible for DAF.

Documents can only be uploaded when the actual window is open for head count data. If you miss uploading at this time, you can share the evidence with us via Anycomms or email the evidence directly to the EY team (2yr old evidence only).
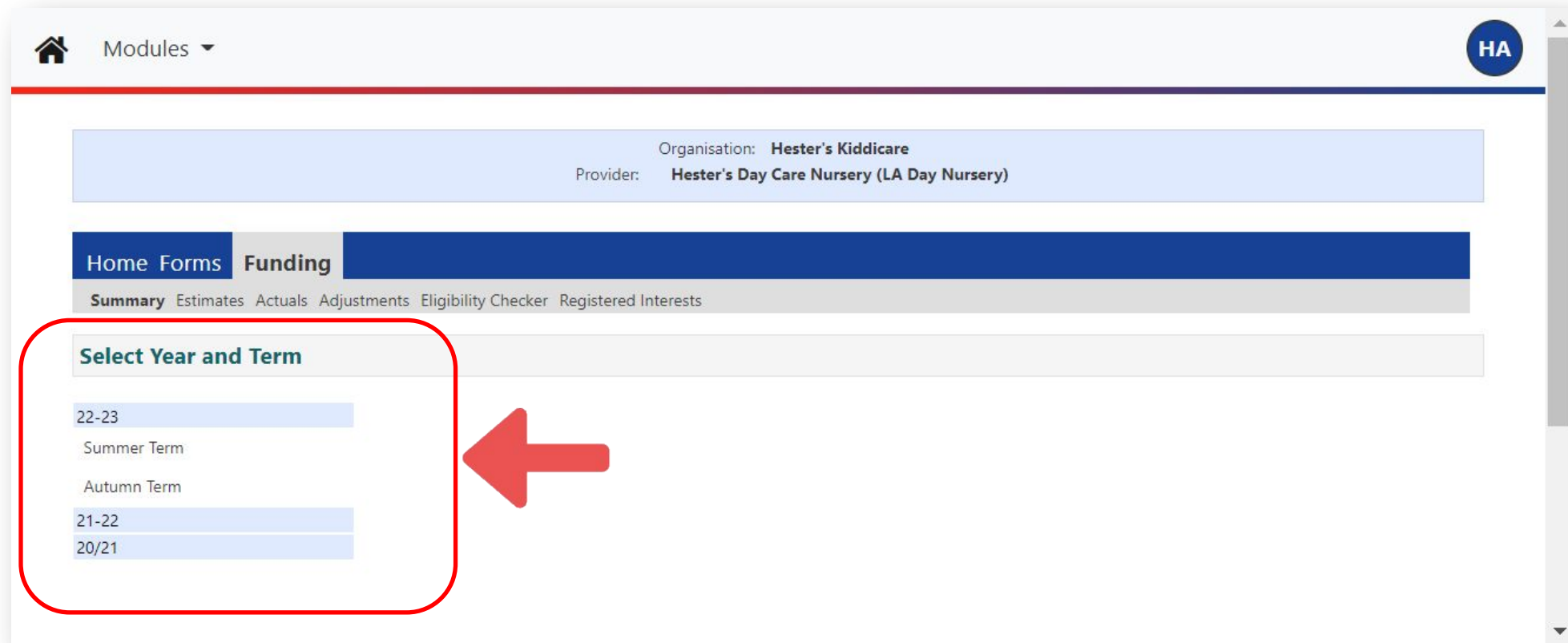
Documents that are received outside of the above period will be uploaded by us. However. please note that whilst you will be able to see the symbol for an attachment (paperclip) you will not be able to open or view the documents if we have uploaded them.

Getting Started with Synergy Document Upload
Choose the Year and Term

- Login into the Synergy Portal as usual.
- From the Funding tab you are going to need to select the correct *Year* and Term. Select **current year** and **current term.**
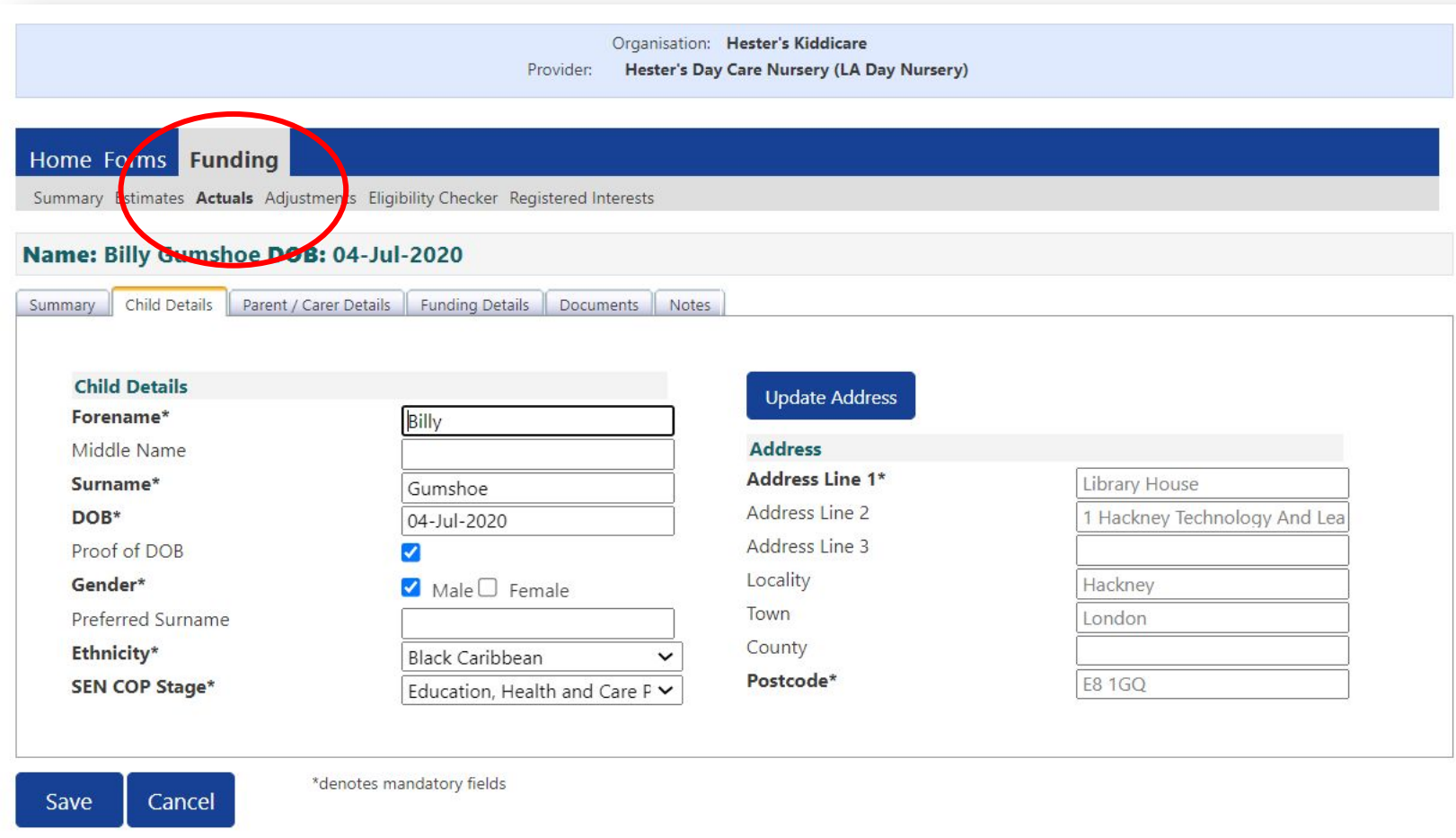
Getting Started with Synergy Document Upload
Choose the Child Record or Create a New one

- Make sure you select the **Funding** then **Actual** tab to choose your record, or if it's a new record complete the relevant tabs and fields.

Getting Started with Synergy Document Upload
Selecting the Document Tab

- Click the **Documents** tab, DAF or two year old eligibility.

Getting Started with Synergy Document Upload
Choose the document to Upload

- Click the **Upload a File** button, lower right hand side of your screen.

Note: Typical file uploads would be letters in Word or pdf format as well as images.

Getting Started with Synergy Document Upload

Choosing the file to upload

- Locate the document you wish to upload, click to select it then click the **Open** button to begin the upload document process.

Uploaded file

Getting Started with Synergy Document Upload
File Description, File Removing, File Saving

- The uploaded document appears in the File Name field. In the **Description** field type a name for the uploaded document.
- <u>To remove a file</u> - if for whatever reason you wish to remove or replace the document click the the **Delete** button.

Name: Billy Gumshoe DOB: 04-Jul-2020

| Summary | 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 5 MB.

Type a description

Description*

DLA Award Letter

File Name

DLA Award Letter.docx

Upload a file

Delete

Click to remove/replace a file
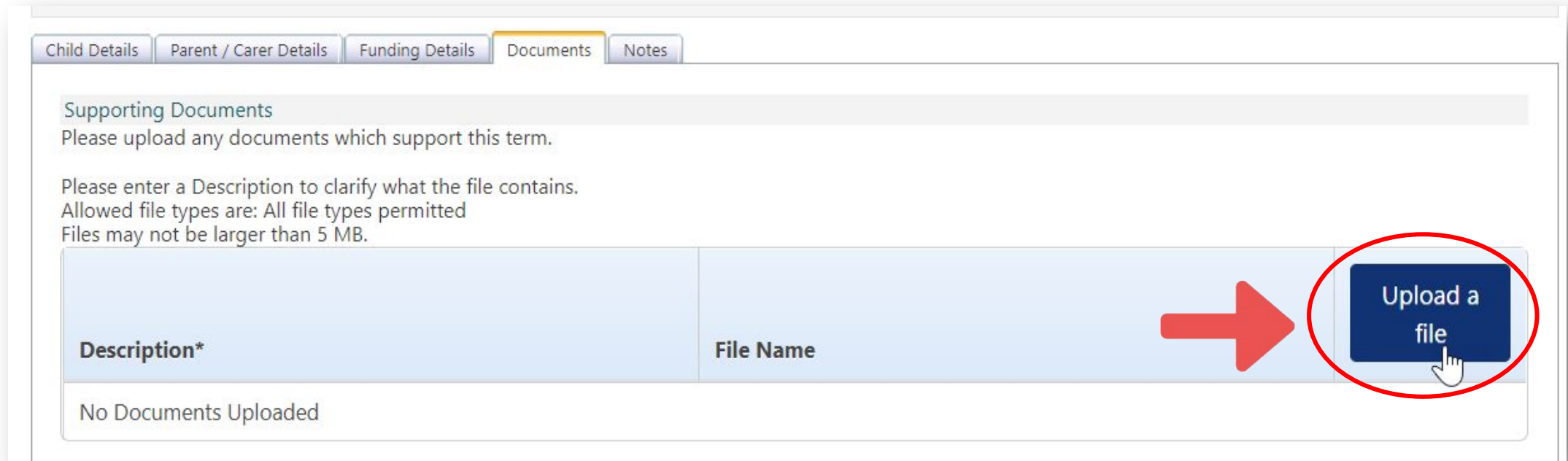
Save   Cancel   *denotes mandatory fields

- Click the **Save** button to save changes.

Getting Started with Synergy Document Upload
Successfully uploaded file

- The uploaded file can be seen to the right of the record with a paperclip icon.
- <u>If you wish to edit the record </u>click the name of the Child in the Child column.

Your file is now successfully uploaded!

Click to edit the record

Document attached

For general help, training, assistance and enquiries please email
freechildcare@hackney.gov.uk