

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

QUICK LEARN GUIDE



# 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).

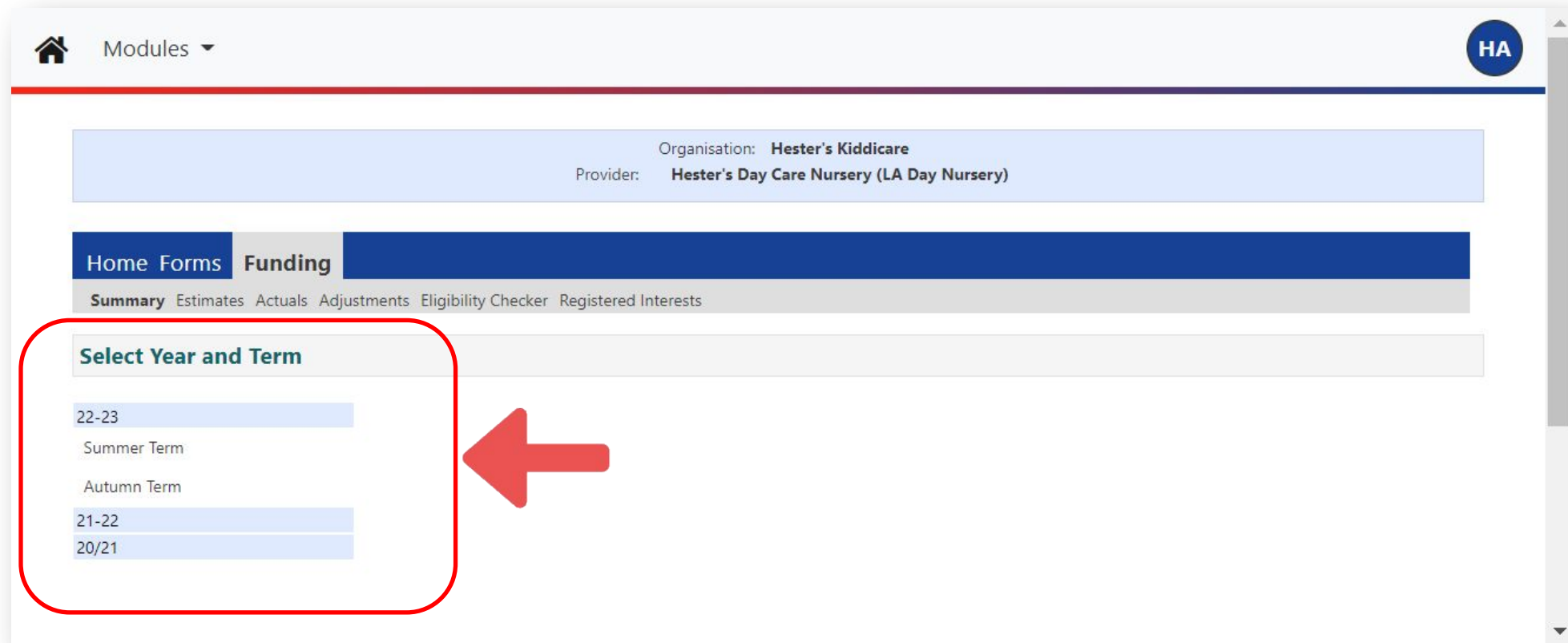


Documents that are received outside of the above period will be uploaded by us. However, please note that whilst you will be able to see the symbol for an attachment (paperclip) you will not be able to open or view the documents if we have uploaded them.

# 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**.

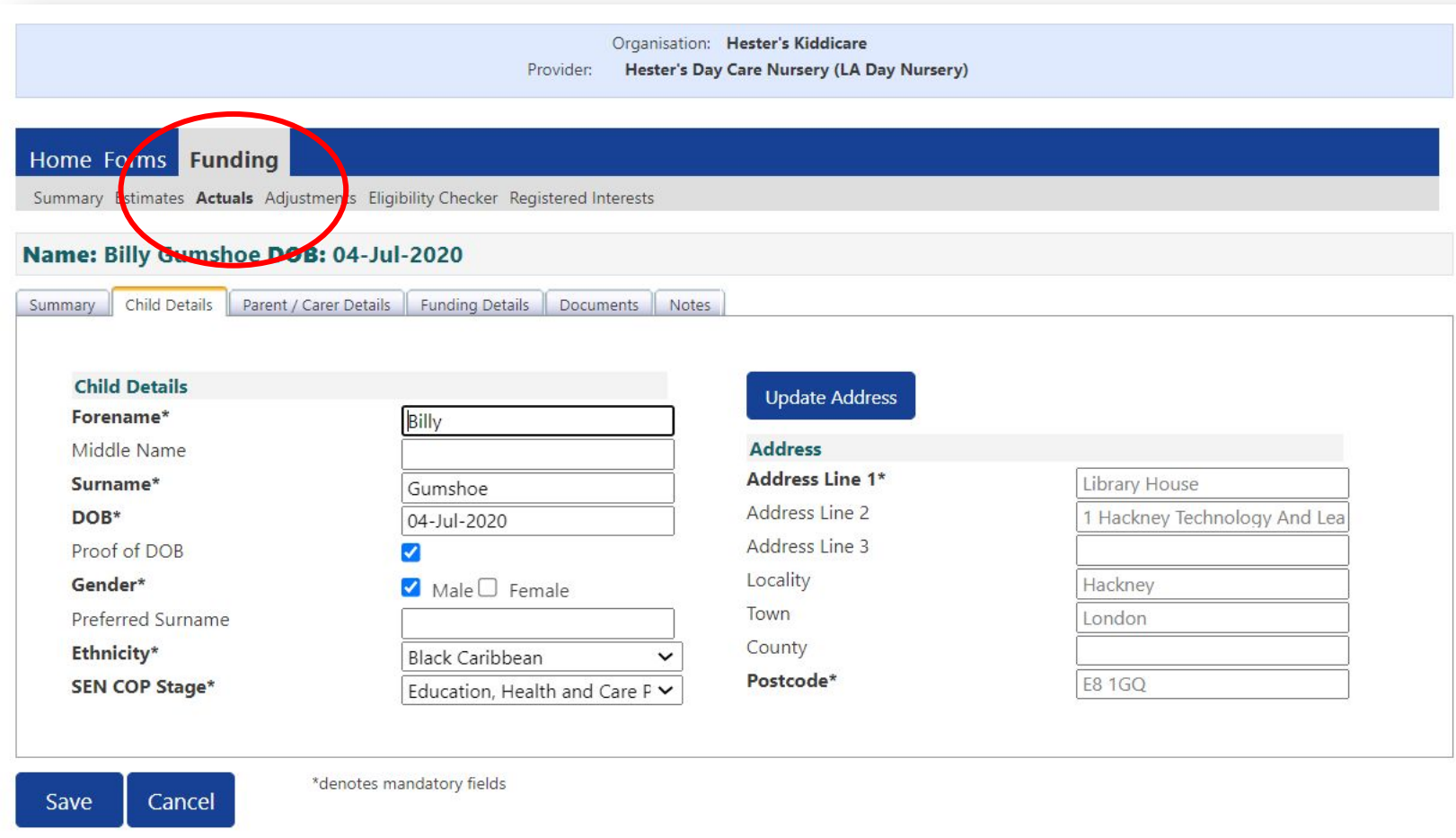


The screenshot shows the Synergy Portal interface. At the top, there is a navigation bar with a home icon, a 'Modules' dropdown menu, and a user profile icon labeled 'HA'. Below the navigation bar, there is a light blue header bar containing the text 'Organisation: Hester's Kiddicare' and 'Provider: Hester's Day Care Nursery (LA Day Nursery)'. The main content area has a dark blue navigation bar with 'Home Forms' and 'Funding' tabs. Underneath, there is a sub-navigation bar with 'Summary', 'Estimates', 'Actuals', 'Adjustments', 'Eligibility Checker', and 'Registered Interests'. The 'Select Year and Term' section is highlighted with a red rounded rectangle. This section contains three rows of selection options: '22-23' with 'Summer Term' and 'Autumn Term' sub-options, '21-22', and '20/21'. A large red arrow points from the right towards the '22-23' row.

# 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.



Organisation: **Hester's Kiddicare**  
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

**Name: Billy Gumshoe DOB: 04-Jul-2020**

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

**Child Details**

<b>Forename*</b>	<input type="text" value="Billy"/>
Middle Name	<input type="text"/>
<b>Surname*</b>	<input type="text" value="Gumshoe"/>
<b>DOB*</b>	<input type="text" value="04-Jul-2020"/>
Proof of DOB	<input checked="" type="checkbox"/>
<b>Gender*</b>	<input checked="" type="checkbox"/> Male <input type="checkbox"/> Female
Preferred Surname	<input type="text"/>
<b>Ethnicity*</b>	<input type="text" value="Black Caribbean"/>
<b>SEN COP Stage*</b>	<input type="text" value="Education, Health and Care P"/>

**Update Address**

**Address**

<b>Address Line 1*</b>	<input type="text" value="Library House"/>
Address Line 2	<input type="text" value="1 Hackney Technology And Lea"/>
Address Line 3	<input type="text"/>
Locality	<input type="text" value="Hackney"/>
Town	<input type="text" value="London"/>
County	<input type="text"/>
<b>Postcode*</b>	<input type="text" value="E8 1GQ"/>

\*denotes mandatory fields

# Getting Started with Synergy Document Upload

## Selecting the Document Tab

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

Organisation: **Hester's Kiddicare**  
Provider: **Hester's Day Care Nursery (LA Day Nursery)**

Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Child Details Part 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.

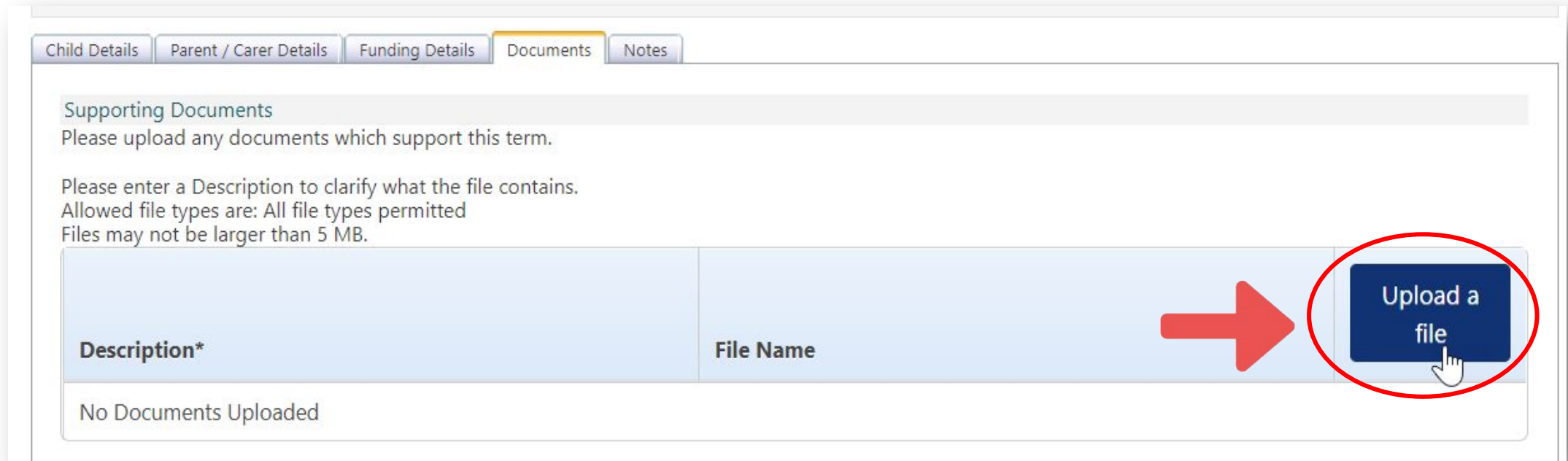
Description*	File Name	Upload a file
No Documents Uploaded		

Save Cancel \*denotes mandatory fields

# Getting Started with Synergy Document Upload

## Choose the document to Upload

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



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.

Description*	File Name
No Documents Uploaded	

Upload a file

**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.

The screenshot illustrates the process of selecting a file for upload. A Windows File Explorer window is open to the Downloads folder, showing a list of files. The file 'DLA Award Letter' is selected and circled in red. A red arrow points from this file to the 'File Name' field in the Synergy document upload form. The 'File Name' field contains the text 'DLA Award Letter.docx', which is also circled in red. A red speech bubble with the text 'Uploaded file' points to this text. The form also includes a 'Description\*' field, 'Save' and 'Cancel' buttons, and 'Upload a file' and 'Delete' buttons. A note at the bottom of the form states '\*denotes mandatory fields'.

# 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.
- To remove a file - if for whatever reason you wish to remove or replace the document click the the **Delete** button.

The screenshot shows a user interface for document management. At the top, it displays the user's name and date of birth: "Name: Billy Gumshoe DOB: 04-Jul-2020". Below this are several tabs: "Summary", "Child Details", "Parent / Carer Details", "Funding Details", "Documents" (which is selected), and "Notes". The main content area is titled "Supporting Documents" and contains instructions: "Please upload any documents which support this term." and "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." Below the instructions is a table with three columns: "Description\*", "File Name", and a column with buttons. The "Description\*" column contains a text input field with "DLA Award Letter" entered. A red speech bubble points to this field with the text "Type a description". The "File Name" column contains "DLA Award Letter.docx", which is circled in red with a red arrow pointing to it from the right. The button column contains "Upload a file" (blue) and "Delete" (red) buttons. A red speech bubble points to the "Delete" button with the text "Click to remove/replace a file". At the bottom left, the "Save" and "Cancel" buttons are circled in red. A red arrow points from the left towards the "Description\*" field. A red asterisk next to "Description\*" is accompanied by the text "\*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.
- If you wish to edit the record click the name of the Child in the Child column.




Home Forms **Funding**

Summary Estimates **Actuals** Adjustments Eligibility Checker Registered Interests

Submit Actual: 22-23 Autumn Term - 2 Year Old Funding CHANGE

Add Child Enter EY Voucher Send Claim

		Status	Child	Funded Hours (inc Adj)	Total Funding Amount for Term (inc Adj)	Child Weightings	
!	↺	New, Unsubmitted Child	<a href="#">Gumshoe, Billy</a> (04-Jul-2020)	100.00	£677.00		

Add Child Enter EY Voucher Send Claim

Click to edit the record

Document attached

Your file is now successfully uploaded!



➔ For general help, training, assistance and enquiries please email [freechildcare@hackney.gov.uk](mailto:freechildcare@hackney.gov.uk)

