Section 9 – Uploading Documents

> Uploading Documents – how to upload documents to a child's record

Documents that are to be uploaded will first need to be saved to a suitable location on your computer. The Document Uploader can accept the following file types:

pdf, .doc, .docx,.ppt, .pptx, .xls, .xlsx, .xml, .bmp, .gif, .jpg, .jpeg, .png, .wav, .mp3, .mp4, .mpg, .mpeg, .mov, .avi, .txt, .rtf, .webm, .ogg, .wav, .ogv, .oga, .flv, .m4v

There is an overall maximum file size of 5MB.

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

| | Funding Suff | | | | | |
|---------------|--------------------|---------------------|------------------|----------------|--|--|
| Summary Est | mates Actuals Adju | stments Eligibility | y Checker Regist | ered Interests | | |
| | | | | | | |
| Select Year a | nd Term | | | | | |
| | | | | | | |
| 2019/20 | | | | | | |
| | | | | | | |
| Summer | | | | | | |
| Spring | | | | | | |
| Autumn | | | | | | |
| | | | | | | |

3. Select Actuals option to input or amend current pupil detail

| | Organisation: Tameside Test Provider: Tameside Test (Tameside Test) |
|--|--|
| | |
| Home Forms Fanding | Sufficiency |
| Summary Estimates Actuals | Adjustments Eligibility Checker Registered Interests |
| | |
| Select Year and Term | |
| | |
| 2019/20 | |
| Submission Period: 29-Mar-2019 to 31-Aug-2019 | |
| Ø Spring | |

4. Select the Term and Funding Type

| Home Forms Funding | Sufficiency | | | |
|--|---|------------------|----------------------|----------|
| Summary Estimates Actuals | djustments Eligibility Checker Registered Interests | | | |
| Adjustments Head Count | Records for 2019/20 - Summer | | | |
| 2019/20 | | Ac | tuals (Office use on | ıly) |
| Summer Submission Period: 14-May-2019 to 31-Aug-2019 | Funding Type | Ready To Process | Processed | Editable |
| Submission Period: 01-Jan-2020 to 31-Mar-2020 | And 4 Year Funding | ~ | | • |
| O Autumn Submission Period: 01-Sep-2019 to 31-Dec-2019 | | | | I |
| 2018/19 | | | | |
| 2017/18 | | | | |
| 2016/17 | | | | |
| 2015/16 | | | | |

5. Click on the child's name, select the Documents Tab and click 'Upload a file'

| Home Forms Funding Sufficiency | | |
|--|------------------|------------------|
| Summary Estimates Actuals Adjustments Eligibility Checker Regi | istered Interest | |
| Name: Bobbie Brown DOB: 14-Jul-2015 | | |
| Summary Child Details Parent / Carer Details Funding Details Documents 1 | 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 | | |
| | | |

- 6. Select the document that you wish to upload (you will have previously saved this to a suitable location on your computer)
- 7. Enter a Description of the document e.g. 'DLA Award for DAF claim' and click Save

| Home Forms Funding Sufficiency | | | | | | | | |
|---|---------------|------------------|--|--|--|--|--|--|
| Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests | | | | | | | | |
| Name: Bobbie Brown DOB: 14-Jul-2015 | | | | | | | | |
| 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. | | | | | | | | |
| Description* | File Name | Upload a file | | | | | | |
| DLA Award for DAF Claim × | DLA Award.jpg | Delete | | | | | | |
| | | | | | | | | |
| Save Cancel *denotes mandatory fields | | | | | | | | |

8. To add another document to the same record, click 'Upload a File' again and repeat the process

(

9. You will now see a paperclip at the side of the child's name indicating that the document has been successfully attached

| Home Forms Funding Sufficiency Summary Estimates Actuals Adjustments Eligibility Checker Registered Interests | | | | | | | | | |
|---|---|-------------------------|-----------------------------------|------------------------------|-----------------------------|---|------------------|--|---|
| Submit Actual: 2019/20 Summer - 3 And 4 Year Funding CHANGE | | | | | | | | | |
| O Not submitted | | | | | | | | | |
| Add Child Send Claim | | | | | | | | | |
| | | Status | Child Name | Universal Hours (inc Adj) | Extended Hours (inc Adj) | Total Funding Amount for Term (inc Adj) | Child Weightings | Eligibility Status | |
| 0 | っ | Edit Pending | Brown, Bobbie (14-Jul-2015) | 180.00 | 0.00 | £766.80 | | (| Q |
| | っ | Edit Pending, Submitted | Brown, Charlie (19-Feb-2016) | 165.00 | 0.00 | £702.90 | | | |
| 0 | っ | Edit Pending | Brown, Susanna (03-Oct-2014) | 180.00 | 0.00 | £862.20 | ЕҮРР | | |
| | × | Unchanged | Doolittle, Eliza (20-Jan-2015) | 150.00 | 150.00 | £1278.00 | | 24-Mar-2019 - 24-Sep-2019 Grace Period: 01-Jan-2020 | |
| | × | Unchanged | Duke, Daisy (25-Mar-2015) | 180.00 | 0.00 | £766.80 | | | |
| | × | Unchanged | Eden, Anthony (12-Sep-2015) | 180.00 | 0.00 | £766.80 | | | |
| | × | Unchanged | Kelly, Grace (27-Nov-2015) | 180.00 | 0.00 | £766.80 | | | |
| | × | Unchanged | Oliver, Jamie (07-Nov-2015) | 180.00 | 0.00 | £766.80 | | | |
| | | , | | | | | | • | ŕ |

10. Click 'Send Claim' – the following message will appear if the submission is successful



11. Sign out

> Troubleshooting

Message

Isppweb.tameside.gov.uk says - The file exceeds the allowed maximum file size of 5 megabytes (5MB)

Solution

- 1. This means your document is too big. Try re-saving your document using a smaller file size
 - File, Save as you may then be able to select a different file size
- 2. If you are unable to save the document in a smaller file save, try saving the document in a different format e.g. pdf this will usually reduce the file size to a smaller size
 - File, Save as In the Save as Type box, select a different file type

| File name: | 99999 - Test Doc - Evidence 🗸 🗸 |
|---------------|--|
| Save as type: | Word Document 🗸 |
| Authors: | Word Document Word Macro-Enabled Document Word 97-2003 Document |
| | Word Template Word Macro-Enabled Template Word 97-2003 Template |
| e Folders | PDF XPS Document |
| | Single File Web Page Web Page Web Page, Filtered |
| | Rich Text Format Plain Text |
| | Word XML Document Word 2003 XML Document Strict Open XML Document |
| | OpenDocument Text / Parental Agreements FF » HFADCOUNT » TEMPLATES - Headcount » New Parental Agreements |

Message

Isppweb.tameside.gov.uk says - The file extension is not allowed. The allowed extensions are pdf, .doc, .docx,.ppt, .pptx, .xls, .xlsx, .xml, .bmp, .gif, .jpg, .jpeg, .png, .wav, .mp3, .mp4, .mpg, .mpeg, .mov, .avi, .txt, .rtf, .webm, .ogg, .wav, .ogv, .oga, .flv, .m4v

Solution

3. Try re-saving your document using one of the accepted file types listed. PDF is usually the most common