Guidance for Uploading Documents to Synergy

Safety Training Awards (STA) have produced this guidance document to assist Approved Training Centres (ATCs) in what section of Synergy is best utilised to store centre documentation. This is a best practice recommendation to maintain high standards and a level of consistency, ensuring all ATC staff will have easy access to relevant documentation if user permission has been granted by the ATC Co-ordinator.

We would highly recommend that ATCs use this guidance to store all ATC administration documentation within Synergy by **Tuesday 31st March 2020**. If you have any questions please do not hesitate to get in contact with the ATCs allocated EQA, Centre Administrator or the Quality Assurance Team at STA.

For any questions about your '**User type**' within Synergy please contact the ATC Co-ordinator.

Type of Document	Synergy - Upload to
ATC Staff Documentation: • Qualification certificates • Qualification upskills / enhancements • CV • CPD • Tutor / Assessor Agreement • IQA Agreement	**Staff Section** From the '**Home**' page click on the '**Staff**' section at the top of the screen: • Click '**Add a staff member**' – Add staff details within the '**Personal Details**' tab, complete the optional '**Relevant Achievements**' tab, upload the supporting documentation to the '**Documents**' tab and '**Save**'. If a staff member has already been added to Synergy, follow the steps below: • Click on '**Staff**' section at the top of the screen • Click on '**Details**' next to the staff members name • Edit the relevant tabs as above • Click on the '**Documents**' tab and upload the relevant supporting documentation and '**Save**' changes.
ATC Meetings and Standardisation: • Minutes from team meetings • Minutes from one to one meetings • Minutes from standardisation meetings	**My Organisation Section** From the '**Home**' page click on the '**My Organisation**' section at the top of the screen: • Click '**Notes**'

• Copies of activities performed for standardisation events.	• Click on the relevant field
	    o Event
	    o Standardisation
	    o Training
	    o Other
	
	• Copy and paste and / or type the information into the notes box and click '**Add Note for Safety Training Awards**'
	
	• Upload your document by clicking on '**Choose File**', access the file
	
	• Click on '**Upload this Document**'.

Centre Notes - Add a note for Safety Training Awards:
 	
The ATC can communicate short concise information with their allocated Centre Administrator via this function.
	My Organisation Section
	
	From the '**Home**' page click on the '**My Organisation**' section at the top of the screen:
	
	• Click '**Notes**'
	
	• Click on the relevant field
	    o Event
	    o Standardisation
	    o Training
	    o Other
	
	• Copy and paste and / or type the information into the notes box and click '**Add Note for Safety Training Awards**'
	
	• Upload your document by clicking on '**Choose File**', access the file
	
	• Click on '**Upload this Document**'.

ATC Site Documentation: • Business insurance • Risk assessments.	**Documents Section** From the '**Home**' page click on the '**Documents**' section at the top of the screen: • Click '**Add a Document**' or click on '**Add Multiple Documents**' to speed up the workflow • Complete all fields • Upload your document by clicking on '**Choose File**', access the file • Click on '**Upload this Document**'.

ATC Policies and Procedures:	Documents Section

• Complaints policy
 	
• Appeals policy
 	
• Equality and Diversity policy
 	
• Health and Safety policy
 	
• Internal Quality Assurance (IQA) policy, including the three sections within the 'Safety Training Awards Internal Quality Assurance Guidance'
 	
     o IQA policy
     o IQA strategy
     o IQA risk rating and sampling plan
 	
• Malpractice and Maladministration
 	
Any additional policies and procedures adopted by the ATC.
	From the '**Home**' page click on the '**Documents**' section at the top of the screen:
	
	• Click '**Add a Document**' or click on '**Add Multiple Documents**' to speed up the workflow
	
	• Complete all fields
	
	• Upload your document by clicking on '**Choose File**', access the file
	
	• Click on '**Upload this Document**'.

IQA Monitoring Activity Reports / Evidence: Please note: ATCs can create an '**Internal Quality Assurance Performance Report**' to attach the paper based copies of IQA monitoring activities, however completing the electronic '**Internal Quality Assurance Performance Report**' via Synergy is a simple and quick process and allows the IQA to complete the relevant sections of what monitoring activities have been completed.	**Documents Section** From the '**Home**' page click on the '**Documents**' section at the top of the screen: • Click '**Add a Document**' or click on '**Add Multiple Documents**' to speed up the workflow • Complete all fields • Upload your document by clicking on '**Choose File**', access the file • Click on '**Upload this Document**' **To Create an electronic 'Internal Quality Assurance Performance Report'** Log in to Synergy and stay on the '**Home**' screen • Click on the **'Internal Quality Assurance Performance Report'** on the right hand side of the screen in '**Forms section**' • Click into the relevant sections of the form and complete all relevant fields • Save the sections when completed • When the form is complete, click '**Submit to AO**' • The report will be reviewed by Safety Training Awards Quality Assurance Team, our records will be updated and the form

	will be '**Closed**'. This will save on the ATCs record providing centre staff with a full audit trail of IQA evidence and allows the allocated EQA to review what IQA activities have been completed.
Cloud Based Storage You can use the document section to upload any ATC administration paperwork to support standardisation within the ATC. This may help the ATC to complete IQA monitoring activities when your IQA is not geographically close to you.	<u>**Documents Section**</u> From the '**Home**' page click on the '**Documents**' section at the top of the screen: • Click '**Add a Document**' or click on '**Add Multiple Documents**' to speed up the workflow • Complete all fields • Upload your document by clicking on '**Choose File**', access the file • Click on '**Upload this Document**'.