

Provider Portal Guide

Staff Training & Management

January 2019

Accessing provider Portal

You can access the portal by copying and pasting the weblink below into your on-line browser. We would recommend that you save this as a “favourite”, usually indicated by a star

<https://lcsa.gateshead.gov.uk/Synergy/Live/Synergyweb/providers/Default.aspx>

Once we have received your signed agreement “Provider Portal Password Policy” the Early Years and Childcare Service will supply you with a User Name and Password.

Please remember to use capitals where required as the system is case sensitive.

Enter User Name and Password and select Sign In



Synergy
Part of the Synergy Software Suite

Sign In

Email address or user name

Password

[Forgotten your password?](#)

[Create a citizen account](#)

[Sign In](#)

Live 18.3
Version 18.3.00660
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servelec synergy

Your first login

For first time users you will be required to complete the following login details to change your password. Remember to store this information securely. We recommend you write your own password security policy. You will find an example at the end of this guide.

Once you have entered this info, select Confirm.



Your authority has requested that you change your password.
Please change your details below in order to continue.

User Settings

Please change your details below:

New Password:

Confirm New Password:

Enter your current password for security reasons:

Current Password:

[Confirm](#)

Your New Password:

- Must be a minimum of 6 characters in length.
- Must contain at least one alphabetic character.
- Must contain a number.
- Must contain an uppercase character.
- Must contain a special character (! \$ % ^ & * () ; : @ # ~).
- Cannot be the same as your Username.
- Cannot be a previously used password.

NOTE:

If you find you have problems logging into the system please contact one of the following:

Lorraine Hurst 0191 4335121

Julie Robertshaw 0191 4335108

Jan Batchelor 0191 4335128

You will see tabs across the top 'Home, Courses, Staff' those of you who use the portal for funding will have additional tabs

Organisation: Gateshead Council

Home Forms Courses Funding Staff Ofsted

Welcome to FIS Provider Portal

Please make a selection from the above menu to proceed. By submitting any information via this portal you are agreeing that: 1. You have read, understood and agreed to the terms set out in the Provider Agreement - September 2018. 2. Parents have consented to the sharing of their personal information with the local authority, to enable accurate records management. 3. Parents are fully aware of how their information is used by the local authority, including the sharing of applicable information with the Department for Education's Eligibility Checking System for EYPP and 30 hour funding.

Notifications

There are unsubmitted child funding records for provider: Gateshead Family Information Service - Childminder

Staff Management

Prior to Providers being able to book themselves and their staff on training, on-line, the staff records must be updated. Within the portal you are able to make us aware of changes to your staff team.

Select the Staff tab

Organisation: Gateshead Council

Home Forms Courses Funding **Staff** Ofsted

Staff List

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date

Previous | Page: 1 | Next [1 Result]

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	Gates, Bill	Ey-Early Years Nursery Nurse	03-Apr-2018	<input type="checkbox"/>

Previous | Page: 1 | Next [1 Result]

[Add Staff](#) [Submit](#)

To add new staff, select add staff, you will need to insert the required info highlighted by an Asterix e.g. Forename* as well as address and qualification records. Please note the address and contact number should be that of the provider rather than personal address of the staff members.

Please also complete the appropriate tick boxes to link the staff member with the provider. If they are the main contact or the census contact please indicate.

Organisation: Gateshead Council

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Staff Main Details | Address/Other Details | **Qualifications** | Questions

Staff Details

Staff Type*	<input type="text"/>	DOB	<input type="text"/>
Title*	<input type="text"/>	Gender*	<input type="checkbox"/> Male <input type="checkbox"/> Female
Forename*	<input type="text"/>	Main Registration Contact	<input type="checkbox"/>
Initials*	<input type="text"/>	Start Date*	<input type="text"/>
Surname*	<input type="text"/>	End Date	<input type="text"/>

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved with Provider	Main Contact	Census Contact	Posts
Gateshead Family Information Service - Childminder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

*denotes mandatory fields

Please note within the qualifications tab

Organisation: Gateshead Council

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Staff Main Details | Address/Other Details | **Qualifications** | Questions

*denotes mandatory fields

We would only like to be made aware of achieved Childcare related qualifications. These are limited to levels only not qualification titles.

Qualification Details

Qualification*	<input type="text"/>
Start Date	<input type="text"/>
Date Achieved	<input type="text"/>
In Progress	<input type="checkbox"/>
Completion Due Date	<input type="text"/>
Date Seen	<input type="text"/>
Drop Out Reason	<input type="text"/>
Date Dropped Out	<input type="text"/>
Notes	<input type="text"/>

*denotes mandatory fields

Save

Send us any changes to your staff records by selecting submit.

Organisation: Gateshead Council

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
Previous | Page: 1 | Next [2 Results]

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	Hunt, Jennifer	Ey-Early Years Quality Childcare Officer	07-Mar-2016	<input type="checkbox"/>
Edit	Unchanged	Hurst, Lorraine	Unknown	23-Mar-2018	<input type="checkbox"/>

Previous | Page: 1 | Next [2 Results]

[Add Staff](#) [Submit](#)

To remove staff from the list, first select edit

Organisation: Gateshead Council

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
Previous | Page: 1 | Next [2 Results]

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	Hunt, Jennifer	Ey-Early Years Quality Childcare Officer	07-Mar-2016	<input type="checkbox"/>
Edit	Unchanged	Hurst, Lorraine	Unknown	23-Mar-2018	<input type="checkbox"/>

Previous | Page: 1 | Next [2 Results]

[Add Staff](#) [Submit](#)

Enter an end date

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Staff Main Details | Address/Other Details | Qualifications | Questions

Staff Details

Staff Type*
Title*
Forename*
Initials*
Surname*

DOB
Gender* Male Female
Main Registration Contact
Start Date*
End Date

Registration Providers

Use this table to identify the Providers with which this staff member is involved and, if relevant, identify them as the Main Contact (primary recipient of communications) and/or Census Contact (included in the annual DfE funding census return).

Provider	Involved with Provider	Main Contact	Census Contact	Post
Gateshead Family Information Service - Childminder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

[Save](#) [Cancel](#) *denotes mandatory fields

Then save and submit.

To edit a staff members information, select edit, you are then able to change staff names, addresses etc as well as qualification records which is especially important when applying for a change in funding rate.

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
Previous | Page: 1 | Next [2 Results]

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	Hunt, Jennifer	Ey-Early Years Quality Childcare Officer	07-Mar-2016	<input type="checkbox"/>
Edit	Unchanged	Hurst, Lorraine	Unknown	23-Mar-2018	<input type="checkbox"/>

Previous | Page: 1 | Next [2 Results]


[Add Staff](#) [Submit](#)

Whenever you have submitted a change you will get a “submission successful” message as shown below.

Organisation: Gateshead Council

Home Forms Courses Funding Sufficiency **Staff** Ofsted

Staff List

 Submission Successful

Manage Staff

If you need to tell us about a leaver, please edit the record and specify their last day as the End Date
Previous | Page: 1 | Next [2 Results]

	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Edit	Unchanged	Hunt, Jennifer	Ey-Early Years Quality Childcare Officer	07-Mar-2016	<input type="checkbox"/>
Edit	Unchanged	Hurst, Lorraine	Unknown	23-Mar-2018	<input type="checkbox"/>

Previous | Page: 1 | Next [2 Results]

[Add Staff](#) [Submit](#)

To book staff on training

Select courses tab then course search

Organisation: Gateshead Council

Home Forms **Courses** Funding Staff Ofsted

Search Courses View Bookings

Course Search

Please select a search route:


Searching is made easier by selecting a particular criteria.

- [Course Search](#)

Use the course type drop down to select the training you require or leave blank and select finish to see all available courses.

Home Forms **Courses** Funding Staff Ofsted

Search Courses View Bookings

 Please note: * indicates that an answer is required.

Course Search

Search Wizard:

Step 1 of 1

Section 1 [Help?](#)

Course Type:

Course Audiences:

Step 1 of 1

The results are shown in a table,

Home Forms **Courses** Funding Staff Ofsted

[Search Courses](#) [View Bookings](#)

Course Search

Your Results:

Previous | Page: 1 2 3 | [Next](#) [13 Results]

	Target Audience	Course	Venue	Course Sessions
Details or Request Places	All Childcare Professionals	Basic Child Protection	The Dryden Centre	20/02/2019: 10:00AM - 12:30PM
Details or Request Places	All Childcare Professionals	Basic Child Protection	The Dryden Centre	26/02/2019: 6:15PM - 8:45PM
Details or Request Places	All Childcare Professionals	Designated Person Training	The Dryden Centre	12/03/2019: 1:00PM - 3:30PM
Details or Request Places	All Childcare Professionals	Designated Person Refresher Training	The Dryden Centre	04/03/2019: 1:00PM - 2:30PM
Details or Request Places	All Childcare Professionals	Designated Person Training	The Dryden Centre	26/06/2019: 10:00AM - 12:30PM

Previous | Page: 1 2 3 | [Next](#) [13 Results]

[New Search](#)

You can view additional information by selecting Further details or request a place

Home Forms **Courses** Funding Staff Ofsted

[Search Courses](#) [View Bookings](#)

Course Search

Course Information:

Course: Designated Person Training
Course Type: Designated Person Training

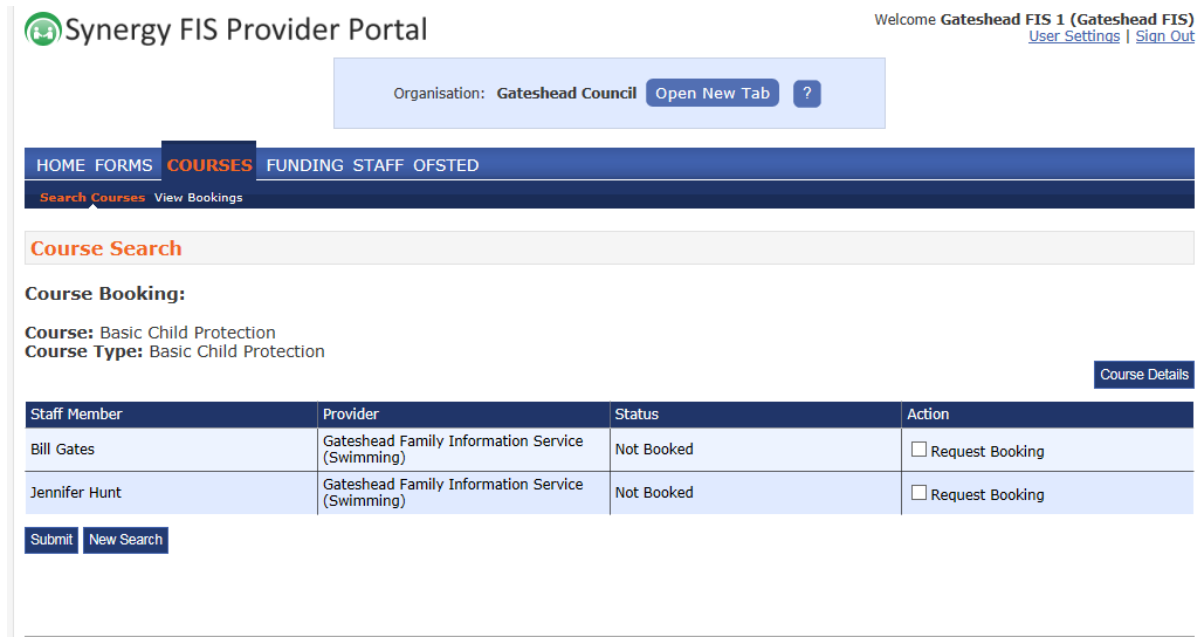
[Request Places](#)

Address Shotley Gardens, Low Fell, Gateshead, Tyne And Wear,NE9 5UR	Course Status 20 Places available	Course Sessions • 26/06/2019: 10:00AM - 12:30PM
Target Audience All Childcare Professionals		

[Back To Results](#) [New Search](#)

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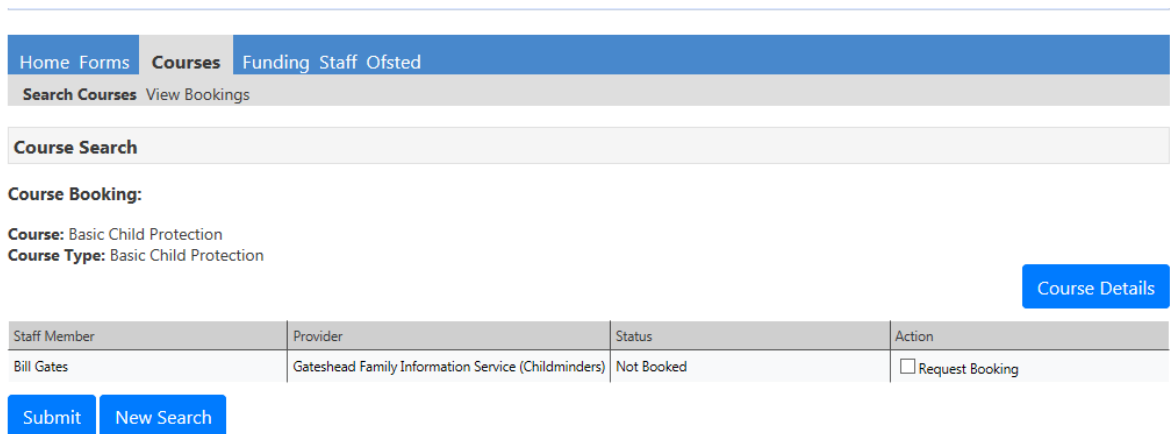
If you select to request places, a list of your staff will be shown, as below. If a member of your staff team is missing please add them through the staff tab as previously shown.



The screenshot shows the Synergy FIS Provider Portal interface. At the top, it says 'Synergy FIS Provider Portal' and 'Welcome Gateshead FIS 1 (Gateshead FIS)'. Below this, there's a navigation bar with 'HOME FORMS', 'COURSES', and 'FUNDING STAFF OFSTED'. The 'COURSES' tab is active, showing 'Search Courses' and 'View Bookings'. The main content area is titled 'Course Search' and shows 'Course Booking:' information: 'Course: Basic Child Protection' and 'Course Type: Basic Child Protection'. There's a 'Course Details' button. Below this is a table with columns: Staff Member, Provider, Status, and Action. The table lists two staff members: Bill Gates and Jennifer Hunt, both with 'Not Booked' status and a 'Request Booking' checkbox. At the bottom, there are 'Submit' and 'New Search' buttons.

Staff Member	Provider	Status	Action
Bill Gates	Gateshead Family Information Service (Swimming)	Not Booked	<input type="checkbox"/> Request Booking
Jennifer Hunt	Gateshead Family Information Service (Swimming)	Not Booked	<input type="checkbox"/> Request Booking

To request a place for your staff member or yourself, tick the request booking box in the action column and submit. You will receive a message to say your request has been submitted. Please note this does not mean you have a place. Letters will be sent as usual to the e-mail address provided to confirm place bookings.



This screenshot is similar to the one above, but with a blue arrow pointing from the text above to the 'Request Booking' checkbox in the 'Action' column of the table. The table only shows one staff member: Bill Gates, with 'Not Booked' status and a 'Request Booking' checkbox.

Staff Member	Provider	Status	Action
Bill Gates	Gateshead Family Information Service (Childminders)	Not Booked	<input type="checkbox"/> Request Booking

Once you have requested a booking, you can view the status by selecting the course, followed by "request places". The status will change to "booked" when a place is confirmed. You will receive confirmations via email approximately 3 weeks prior to the course start date.

If you need to cancel a booked place please e-mail childcaretraining@gateshead.gov.uk stating your reasons for cancellation.

Password Security Policy Example

Provider Name:

Policy Owner:

Signed:

Date:

Review Policy Date:

All employees and personnel that have access to organisational computer systems must adhere to the password policies defined below in order to protect the security of the network, protect data integrity, and protect computer systems.

This policy is designed to protect the organisational resources on the network by requiring protection of these passwords

This policy applies to any and all who have access to Gateshead Council's provider portal.

Policy agreement:

I/ we will not:

- Write passwords down or send through email.
- Share our password further than necessary. Currently the staff to have access are :
 - 1.
 - 2.
 - 3.
- Use the "Remember Password" feature of application programmes such as Internet Explorer, your email programme, or any other programme.

I/ we agree to:

- Report any suspicion of your password security being broken to the Early Years and Childcare Service within ? hrs of this coming to our attention.
- Change the password within ? hrs when a member of staff with access has their access removed or leaves the provision.

Since password security is critical to the security of the organisation and service users, employees that do not adhere to this policy may be subject to disciplinary action up to and including dismissal.

Staff signatures

Name

Signature

Date

1.

2.

3.