

Synergy FIS Provider Portal

Online forms and staff update user guide
Updated December 2015

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Logging on

To access the Online Provider Portal you will need a **User Name** and a **Password**, which was initially provided to you by The Family Information Service. Contact 0161 770 1857 or email familyinfo@oldham.gov.uk

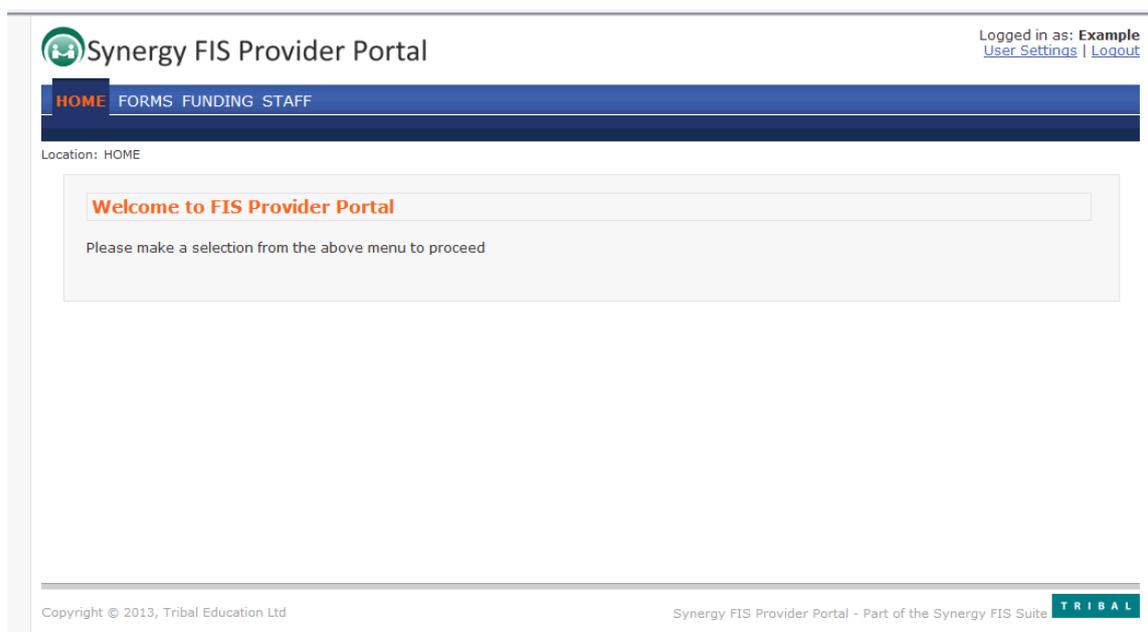
To access the logon page go to:

<https://fis.oldham.gov.uk/FIS/DataCollection/login.aspx>

This will display as follows:



Insert your **User Name** and **Password** and click the **Sign In** button to display the

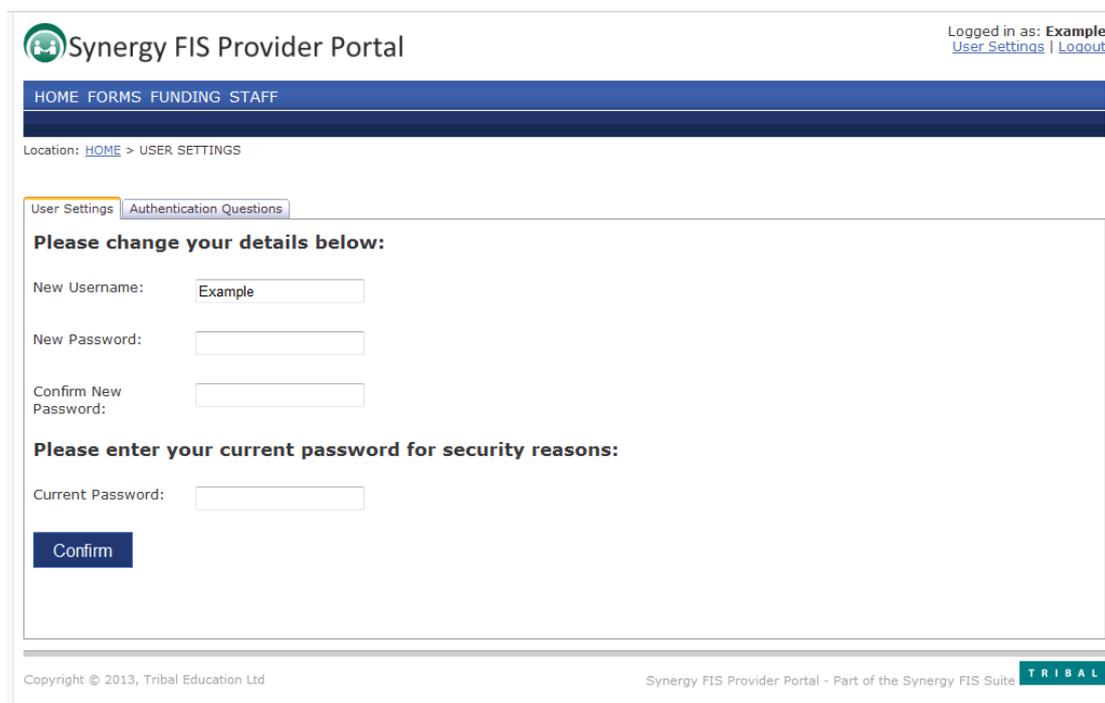


User settings

You will notice that the top right hand corner of the Welcome Page displays your **user name** and links to **User Settings** and to **Logout**.



Click on **User Settings** to display the following page:

The screenshot shows the Synergy FIS Provider Portal interface. At the top left is the logo and the text "Synergy FIS Provider Portal". At the top right, it says "Logged in as: Example" with links for "User Settings" and "Logout". Below this is a navigation bar with "HOME FORMS FUNDING STAFF". The main content area has a breadcrumb "Location: HOME > USER SETTINGS" and two tabs: "User Settings" (active) and "Authentication Questions". The main heading is "Please change your details below:". It contains three input fields: "New Username:" with the value "Example", "New Password:", and "Confirm New Password:". Below these is another heading "Please enter your current password for security reasons:" followed by a "Current Password:" input field. A blue "Confirm" button is at the bottom left of the form area. The footer contains "Copyright © 2013, Tribal Education Ltd" and "Synergy FIS Provider Portal - Part of the Synergy FIS Suite" with the TRIBAL logo.

You can use this page to change your user name and password to something more memorable; but this is not mandatory and you can continue to use the details provided to you by The Family Information Service.

Remember to keep your logon details secure and difficult for anybody to guess.

If you choose to change your details insert the new details and press **Confirm** as follows:

Location: [HOME](#) > USER SETTINGS

User Settings **Authentication Questions**

Please change your details below:

New Username:

New Password:

Confirm New Password:

Please enter your current password for security reasons:

Current Password:

Press

If you have filled the fields in correctly you will now see:

Synergy FIS Provider Portal Logged in as: **Example**
[User Settings](#) | [Logout](#)

HOME FORMS FUNDING STAFF

Location: [HOME](#) > USER SETTINGS

User Settings **Authentication Questions**

Please change your details below:

New Username:

New Password:

Confirm New Password:

Please enter your current password for security reasons:

Current Password:

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You can now click [HOME](#) to take you back to the **Welcome Page** or if you have finished, you can [Logout](#).

Forms

You can use the online forms to check and update the information held by The Family Information Service about your setting:

Press **FORMS** to open the following page:

The screenshot shows the Synergy FIS Provider Portal interface. At the top, there is a navigation bar with 'HOME', 'FORMS', and 'FUNDING STAFF'. Below this, there are links for 'Fill In Forms' and 'View Forms'. The breadcrumb trail indicates the current location: 'HOME > FORMS > FILL FORMS'. A section titled 'Fill In Forms' contains the instruction 'Please select a form below to update your details:'. Below this instruction is a list of ten form links: '01 - Main Details', '02 - Age Groups', '03 - Vacancy Summary', '04 - Availability', '05 - Costs', '06 - Facilities', '07 - School Pickups', '08 - Special Needs', '09 - Provider Questions', and '10 - Local Offer - Provider Questions'. An arrow points from the text 'You open a form by simply clicking the link' to the '01 - Main Details' link. In the top right corner, the user is logged in as 'Admintest' with links for 'User Settings' and 'Logout'. A dropdown menu for 'Manage Providers' is set to 'Admin Test (Early Years)'. The footer contains the copyright information '© 2015 Tribal Education Ltd' and the text 'Synergy FIS Provider Portal - Part of the Synergy FIS Suite' with the 'TRIBAL' logo.

You open a form by simply clicking the **link**

Change or correct details as necessary

For example, clicking [01-Main Details](#) opens the following new page:

Main Details

Next Page Select page: Main Details - Title >>

Telephone Number: 0161 770 0000

Mobile Number:

Fax:

Email Address: oldham.council@example.com

Website:

Next Page Select page: Main Details - Title >>

Submit Form

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Note

Some forms have multiple pages after completing each page click **Next Page** until you see the page shown below, this means there are no further pages on this form.

Remember to click **Submit Form** to be approved

Synergy FIS Provider Portal :: Forms : Info Path Form - Windows Internet Explorer

Main Details

Previous Page Select page: Main Details - Title >>

Previous Page Select page: Main Details - Title >>

Submit Form

Synergy FIS Provider Portal - Part of the Synergy FIS Suite **TRIBAL**

Synergy FIS Provider Portal

Logged in as: **Admin Test**
User Settings | Logout

HOME **FORMS** FUNDING STAFF

Fill In Forms View Forms

Please select a provider from the drop down below

Location: HOME > FORMS > FILL FORMS

Manage Providers: Admin Test (Early Years)

You have successfully submitted the form.

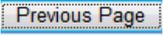
Synergy FIS Provider Portal **TRIBAL**

When you have successfully submitted your form you can move onto the next form by following the same procedure.

Local Offer - Provider Questions

See Oldham Early Years Local Offer Guidance v1 to complete the Local Offer – Provider Questions

Reminder

Remember some forms have multiple pages after completing each page click **Next Page** until you see  this means there are no further pages on this form.

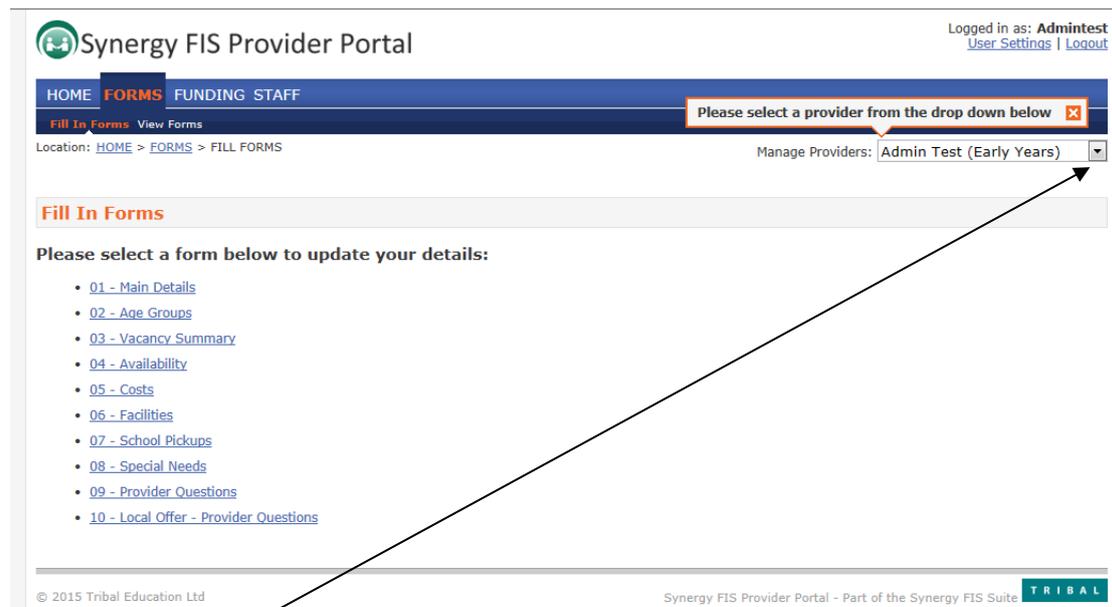
Remember to click **Submit Form** to be approved

Registrations with more than one setting

Where a provider operates more than one setting, for example a day nursery and an out of school club, the provider will be given one **User Name** and **Password**.

However, when they logon and select **FORMS** they will be able to choose, which setting they wish to update.

To do this click on Manage Providers, as follows:



The screenshot shows the Synergy FIS Provider Portal interface. At the top, it says "Synergy FIS Provider Portal" and "Logged in as: Admintest" with links for "User Settings" and "Logout". The navigation bar includes "HOME", "FORMS", and "FUNDING STAFF". Below the navigation bar, there is a "Fill In Forms" section with a "View Forms" link. A dropdown menu is open, showing "Please select a provider from the drop down below" and "Admin Test (Early Years)". The main content area is titled "Fill In Forms" and contains the instruction "Please select a form below to update your details:". Below this instruction is a list of form categories: "01 - Main Details", "02 - Age Groups", "03 - Vacancy Summary", "04 - Availability", "05 - Costs", "06 - Facilities", "07 - School Pickups", "08 - Special Needs", "09 - Provider Questions", and "10 - Local Offer - Provider Questions". An arrow points from the dropdown menu to the "01 - Main Details" link. At the bottom, there is a copyright notice "© 2015 Tribal Education Ltd" and a logo for "Synergy FIS Provider Portal - Part of the Synergy FIS Suite TRIBAL".

Select **Setting** by clicking onto its name. You can then update the **FORMS** for this setting. You can then select your other Setting and update its **FORMS**.

Staff

You can now add, update or remove staff from your record by selecting the **STAFF** tab

Synergy FIS Provider Portal

Logged in as: Example
[User Settings](#) | [Logout](#)

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > STAFF

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	Example, Staff 1	Staff - Paid	12-Oct-2013	<input checked="" type="checkbox"/>
Edit	Unchanged	Example, Staff 2	Staff - Paid	12-Oct-2013	<input type="checkbox"/>

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

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

By selecting **Add Staff** you can add new staff members. You can also **Edit** or amend staff details.

HOME FORMS FUNDING **STAFF**

Staff List

Location: [HOME](#) > [STAFF](#) > STAFF DETAILS

Staff Main Details | [Address/Other Details](#) | [Qualifications](#) | [Training History](#) | [Questions](#)

Staff Details

Staff Type* DOB
 Title* Gender* Male Female
 Forename* Main Registration Contact
 Initials* Start Date*
 Surname* 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
Example Day Nursery - Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Manager"/>
Example Out Of School - Training	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Manager"/>

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

Please note if staff members no longer are with you please fill in **End Date** before you submit. Once all details has been amended, click **Save**

Continue to amend relevant details on **Address/Other Details**

HOME FORMS FUNDING **STAFF**

Staff List

Location: HOME > STAFF > STAFF DETAILS

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

Address

Address Line 1: Oldham Council
 Address Line 2: Barn Street
 Address Line 3:
 Locality: Oldham
 Town: Oldham
 County:
 Postcode: OL1 1LP
 Telephone (Home):
 Telephone (Work): 0161 770 1234
 Telephone (Mobile): 07789 123 456

Ethnicity: White British
 NI Number:
Contact Preferences
 E-Mail Address: oldham.council@example.com
 Include in Letters:
 Print Letters:
 E-Mail Letters:
 Use Work Address:

Save Cancel *denotes mandatory fields

Click **Save** once all details have been amended

You are able to amend or add staff qualifications by going to the **Qualifications** tab for all staff members.

HOME FORMS FUNDING **STAFF**

Staff List

Location: HOME > STAFF > STAFF DETAILS

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

		Status	Qualification	Start Date	Achieved	In Progress	Due Date	Date Seen	Dropped Out
Request Delete	Edit	Unchanged	Advanced Cert. Food Hygiene	01-Jun-2014	30-Jun-2014	<input type="checkbox"/>			
Request Delete	Edit	Unchanged	Level 5 - BTEC HND Early Childhood Studies	03-Dec-2012	02-Dec-2013	<input type="checkbox"/>	02-Dec-2013		

Add Qualification

Save Cancel *denotes mandatory fields

Click **Add Qualification** which will take you to **Qualification Details** .

Qualification Details

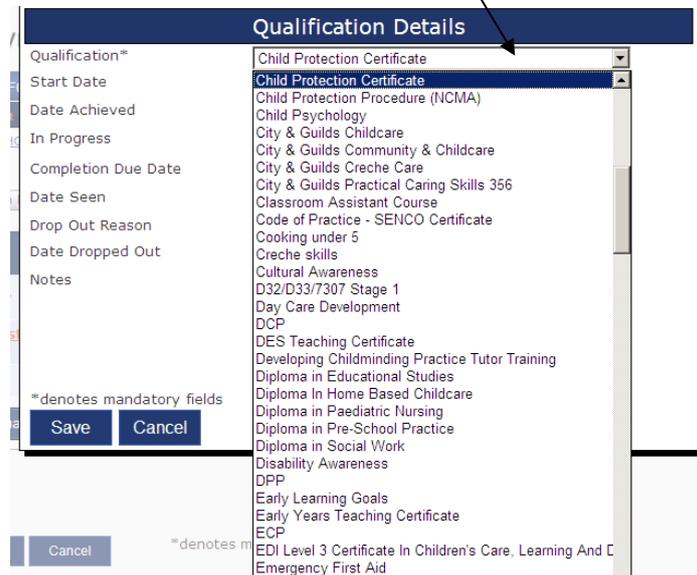
Qualification*
 Start Date
 Date Achieved
 In Progress
 Completion Due Date
 Date Seen
 Drop Out Reason
 Date Dropped Out
 Notes

*denotes mandatory fields

Save Cancel

Type in the first letter of the qualification and the appropriate qualification will appear. You can also click on the **drop down** arrow to select required qualification.

(If the qualification doesn't appear on the drop down list Contact 0161 770 1857)



The screenshot shows the 'Qualification Details' form. The 'Qualification*' field is highlighted with a dropdown menu. The dropdown list includes the following items: Child Protection Certificate, Child Protection Procedure (NCMA), Child Psychology, City & Guilds Childcare, City & Guilds Community & Childcare, City & Guilds Creche Care, City & Guilds Practical Caring Skills 356, Classroom Assistant Course, Code of Practice - SENCO Certificate, Cooking under 5, Creche skills, Cultural Awareness, D32/D33/7307 Stage 1, Day Care Development, DCP, DES Teaching Certificate, Developing Childminding Practice Tutor Training, Diploma in Educational Studies, Diploma in Home Based Childcare, Diploma in Paediatric Nursing, Diploma in Pre-School Practice, Diploma in Social Work, Disability Awareness, DPP, Early Learning Goals, Early Years Teaching Certificate, ECP, EDI Level 3 Certificate in Children's Care, Learning and Development, and Emergency First Aid. The 'Date Seen' field is also visible and is marked as mandatory with an asterisk.

Please note **Date Seen** needs to be filled in for all qualifications.

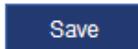
You no longer need to send in copies of certificates, but you will need to provide them to Ofsted or when audited by the Free Early Education Entitlement Team

(The Free Early Education Entitlement team check this when applying weightings for funding)



The screenshot shows the 'Qualification Details' form with the 'Date Seen' field highlighted. The form includes fields for Qualification*, Start Date, Date Achieved, In Progress (checkbox), Completion Due Date, Date Seen, Drop Out Reason, Date Dropped Out, and Notes. The 'Date Seen' field is marked as mandatory with an asterisk. The 'Save' and 'Cancel' buttons are visible at the bottom.

Once amended click



This will take you to back to the qualifications page with the amended qualification.

Synergy FIS Provider Portal

Logged in as: **Example**
[User Settings](#) | [Logout](#)

HOME FORMS FUNDING **STAFF**

[Staff List](#)

Location: [HOME](#) > [STAFF](#) > STAFF DETAILS

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

	Status	Qualification	Start Date	Achieved	In Progress	Due Date	Date Seen	Dropped Out
Cancel Delete	Edit Delete Pending	Advanced Cert. Food Hygiene	01-Jun-2014	30-Jun-2014	<input type="checkbox"/>			
Request Delete	Edit Unchanged	Level 5 - BTEC HND Early Childhood Studies	03-Dec-2012	02-Dec-2013	<input type="checkbox"/>	02-Dec-2013		
Delete	Edit Add Pending	Child Protection Certificate			<input type="checkbox"/>			
Delete	Edit Add Pending	Child Protection Certificate			<input type="checkbox"/>			

[Add Qualification](#)

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

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Click [Save](#) to confirm your changes.

You can also fill in the **Training History** for all staff

HOME FORMS FUNDING **STAFF**

[Staff List](#)

Location: [HOME](#) > [STAFF](#) > STAFF DETAILS

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

[Add Training](#)

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

Click on [Add Training](#)

This will take you to the **Training History** page. Click the **drop down** arrow and select relevant training

(If the training description doesn't appear on the drop down list contact 0161 770 1857)

Training History

Training Date* 01-Jul-2014

Course Type* Non-Qualifying

Course Description* Early Communication

Course Code

Training Provider

*denotes mandatory fields

Save Cancel

Click  when selection is complete.

Saved training will appear on the **Training History** tab. If you require to add further training select  and follow same instructions as above.

HOME FORMS FUNDING STAFF

Staff List

Location: HOME > STAFF > STAFF DETAILS

Staff Main Details Address/Other Details Qualifications Training History Questions

	Status	Training Date	Training Provider	Course Type	Course Code	Course Description	Venue
Delete Edit	Add Pending	01-Jul-2014		Non-Qualifying		Early Communication	

Add Training

  *denotes mandatory fields

Once all training has been added click 

Please provide additional information relating to the staff members role in the setting by selecting the **Questions** tab

Once all relevant questions have been answered click

Save

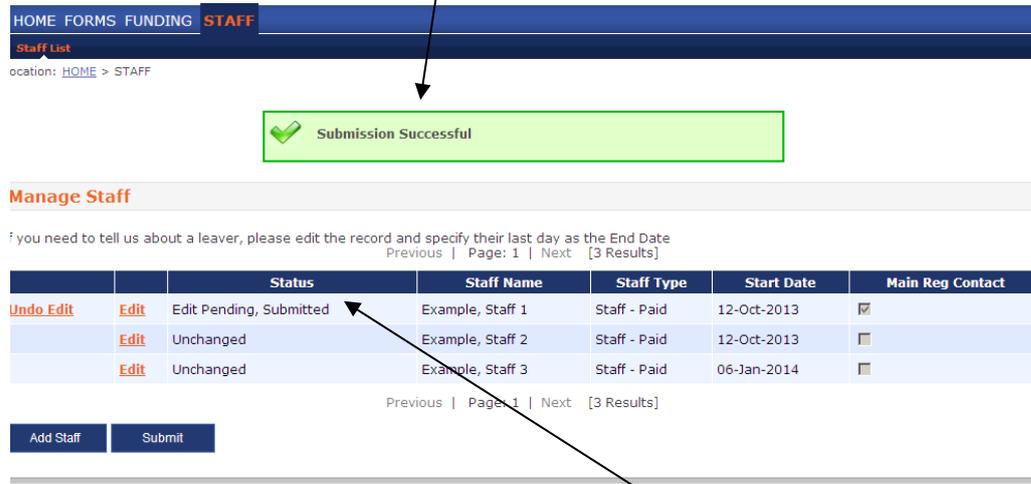
The status of the staff member will change to **Edit Pending**

Undo Edit	Edit	Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Undo Edit	Edit	Edit Pending	Example, Staff 1	Staff - Paid	12-Oct-2013	<input checked="" type="checkbox"/>
	Edit	Unchanged	Example, Staff 2	Staff - Paid	12-Oct-2013	<input type="checkbox"/>
	Edit	Unchanged	Example, Staff 3	Staff - Paid	06-Jan-2014	<input type="checkbox"/>

Once record is saved, please click

Submit

Once submitted you will see this message.



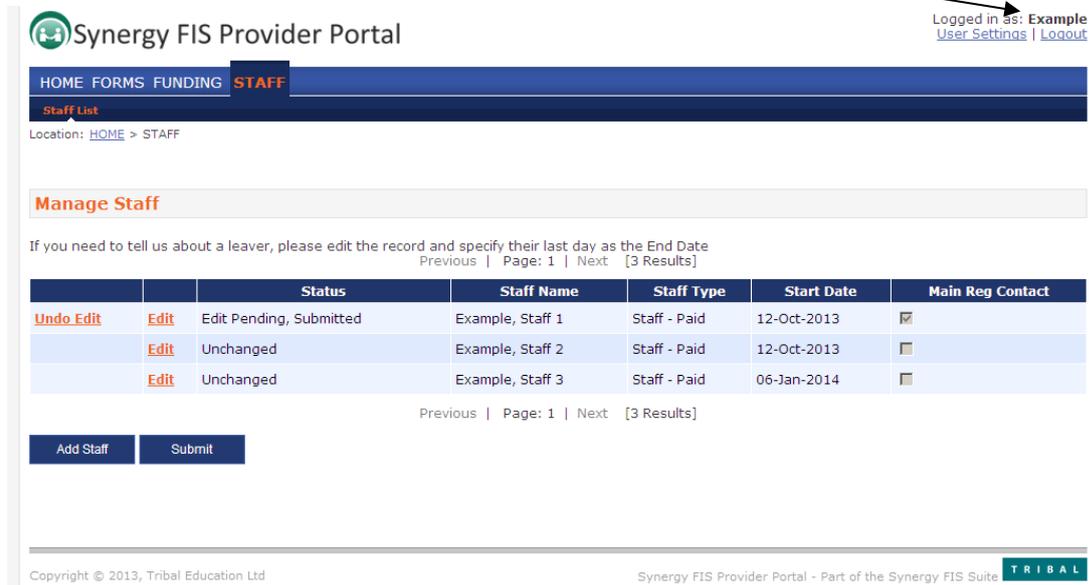
The screenshot shows a web interface for managing staff. At the top, there is a navigation bar with 'HOME', 'FORMS', 'FUNDING', and 'STAFF'. Below this is a 'Staff List' section with a breadcrumb 'Location: HOME > STAFF'. A green box with a checkmark and the text 'Submission Successful' is displayed. Below this is a 'Manage Staff' section with a note: 'If you need to tell us about a leaver, please edit the record and specify their last day as the End Date'. A table with 7 columns is shown: 'Status', 'Staff Name', 'Staff Type', 'Start Date', and 'Main Reg Contact'. The first row has 'Edit Pending, Submitted' status, 'Example, Staff 1' name, 'Staff - Paid' type, '12-Oct-2013' start date, and a checked checkbox. The second and third rows have 'Unchanged' status. Below the table are 'Add Staff' and 'Submit' buttons.

		Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Undo Edit	Edit	Edit Pending, Submitted	Example, Staff 1	Staff - Paid	12-Oct-2013	<input checked="" type="checkbox"/>
	Edit	Unchanged	Example, Staff 2	Staff - Paid	12-Oct-2013	<input type="checkbox"/>
	Edit	Unchanged	Example, Staff 3	Staff - Paid	06-Jan-2014	<input type="checkbox"/>

The status for the staff member will be changed to **Edit Pending, Submitted**. Once the change has been approved by the Family Information Service the status will change back to **Unchanged**.

Logout

When you have finished press **Logout**. Never leave the site open whenever it is not being used, especially if you leave your computer unattended for any reason.



Synergy FIS Provider Portal Logged in as: **Example**
[User Settings](#) | [Logout](#)

HOME FORMS FUNDING **STAFF**

[Staff List](#)

Location: [HOME](#) > STAFF

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 [3 Results]

		Status	Staff Name	Staff Type	Start Date	Main Reg Contact
Undo Edit	Edit	Edit Pending, Submitted	Example, Staff 1	Staff - Paid	12-Oct-2013	<input checked="" type="checkbox"/>
	Edit	Unchanged	Example, Staff 2	Staff - Paid	12-Oct-2013	<input type="checkbox"/>
	Edit	Unchanged	Example, Staff 3	Staff - Paid	06-Jan-2014	<input type="checkbox"/>

Previous | Page: 1 | Next [3 Results]

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

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