Online Provider Portal help guide

How to run a Staff Contact report

About this guide

This is a step-by-step guide for how to view the staff records, portal account users, designated safeguarding leads and main contacts, currently attached to your registration.

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Internet browsers

It is recommended you use an up to date internet browser. If you experience technical difficulties, try updating or use an alternative browser, such as

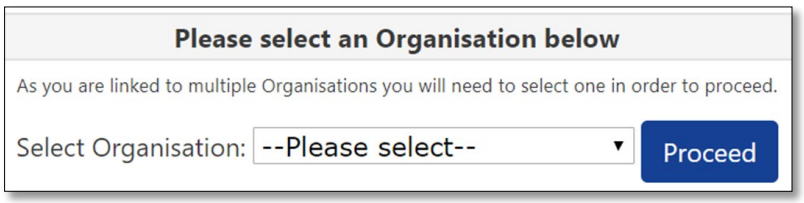
- Google Chrome
- Microsoft Edge
- Mozilla Firefox

How to find and open the report

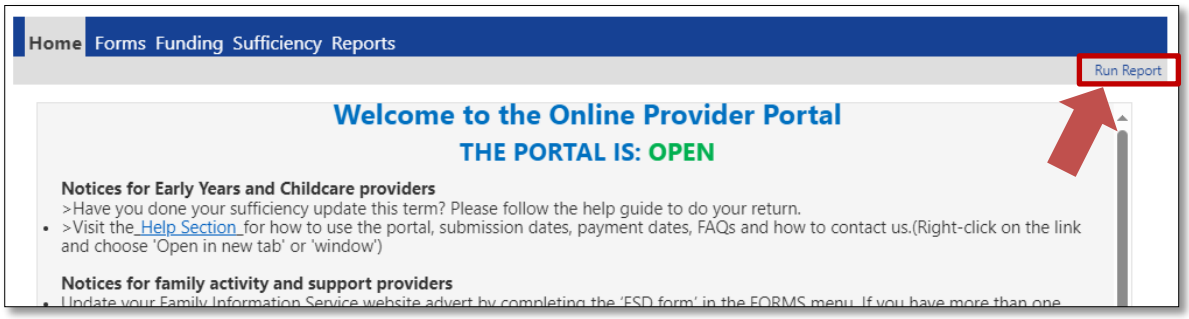
1. Sign in to the Online Provider Portal.

2. If your account has access to more than one setting, choose the appropriate one from the 'select organisation' drop down at the top of the screen. For example, if you are the main contact for a day nursery and a pre-school, both settings will be listed.

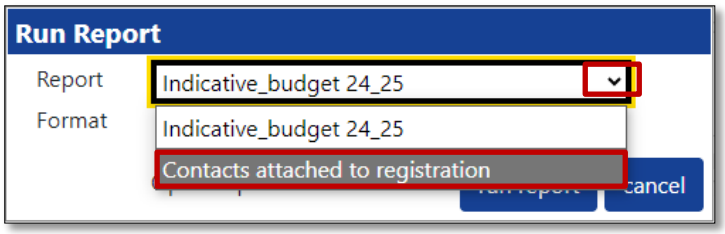
   Once you have selected the relevant setting click the **Proceed** button



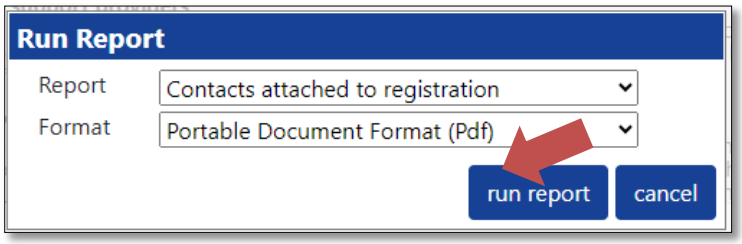
3. Choose **Run Report** in the top right of the screen.



4. To expand the **report** drop down menu click the arrow to the right, and choose **Contacts attached to registration**.



5. Click the arrow to expand the format drop down and select Portable Document Format (PDF). Then click **run report**.

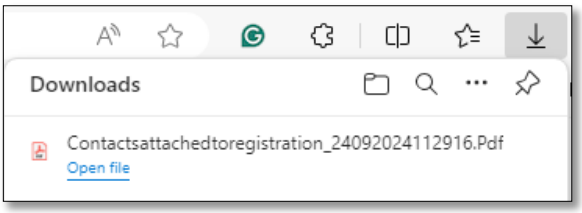


Viewing and using the report

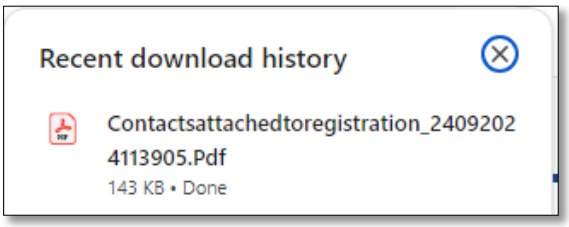
6. The report will download from your browser in a PDF format.

- Depending on your device, or browser, this may open automatically, or appear in your downloaded files.

Microsoft Edge



Google Chrome



7. Open the PDF to view the report. This will display a full list of the staff contacts that are currently attached to your record.
Main contact: This should be the person who the Family Information Service or Early Years Funding Team can make direct contact with at the setting.
Send post to provider address: This is only relevant for the Main Contact for your setting. If they do not wish to receive post at their home address and this column states 'yes', we will send any postal correspondence to the setting.
Desginated Safegurading Lead (DSL): If this shows '1', the member of staff is listed as the DSL for the setting.
Portal Account: If this shows '1', the member of staff has an active online provider portal account for the setting.

First name	Last name	Main contact?	Send post to provider address?	Email	Address line 1	Street	Town	Postcode	Post Title	Designated Safeguarding Lead	Portal Account
Suzanna	Thursday	No	No	srtillatest@westsussex.gov.uk	Testy Testy Test Test	St James Road	Chichester	PO19 7HA		1	0
Louise	Twelve	No	Yes	test@test.com	Portfield Community Primary School	St James Road	Chichester	PO19 7HA		0	1
Harmony	Mild	No	No	borntobemild@example.com	Education Department, West Sussex County Council	County Hall	Chichester	PO19 1RF	Bank Staff	0	0

What to do if the information is incorrect

8. If you notice any of the following discrepancies, you will need to complete a Staff Update Form:
   - Staff are listed that no longer work at your setting
   - Staff who require a portal account are not listed
   - Any incorrect names, addresses, or email addresses
   - Incorrect/change of main contact
   - Incorrect/change of designated safeguarding lead (DSL)

   Help guide: How to complete a Staff Update form

   Please note, we only require settings to inform us of the following staff;

   - Staff who require a portal account
   - Main contact
   - Designated safeguarding lead(s)

   Settings can remove/update this information through a Staff Update Form.

   If you need to remove a DSL or portal account holder, please email family.info.service@westsussex.gov.uk with this information.

END