Online Provider Portal help guide

How to complete a Staff Update form

About this guide

This is a step-by-step guide for how to complete a Staff Update form using the Online Provider Portal. The form will take approximately 10 minutes to complete.

Contents

Before you start

Have these things ready

- The staff member's name, address, phone number, email address and job title
- Their start date, if they are new
- Their leave date (end date), if they have left

Things to know

- You cannot save your progress to continue at a later time
- You can only complete this form for one staff member at a time

If you require assistance signing in to the portal

- Find help online

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 etc.
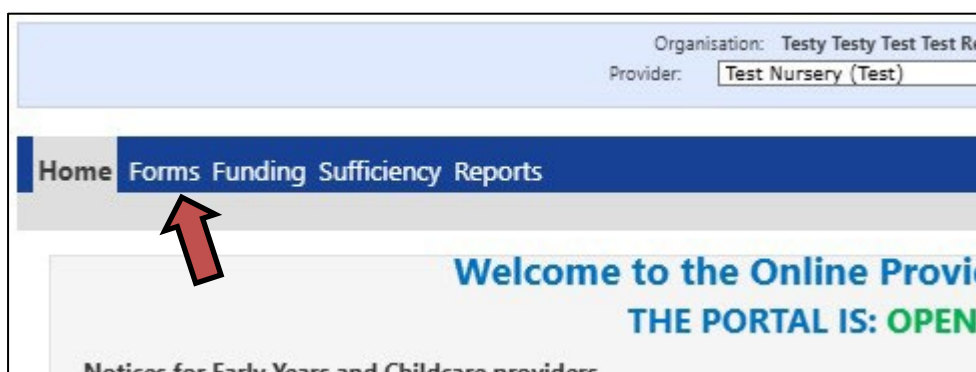
How to find and open the form

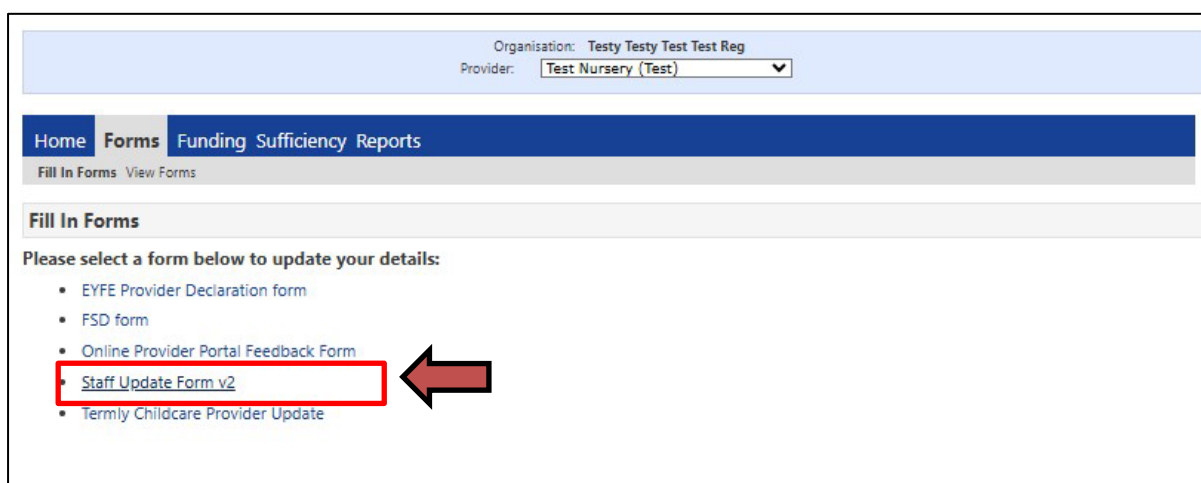1. [Sign in](#) to the portal

   If your account has access to more than one provider, choose the appropriate one from the list at the top of the screen.
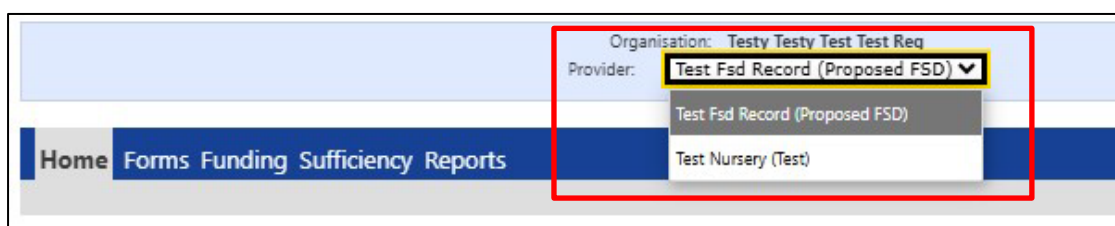
2. Click **Forms** in the top menu

3. Choose **Staff Update Form v2**

Completing the form

4. The form opens in a separate window and consists of 3 pages.

- Read the form in full, following the instructions within to answer each section correctly
- Move between pages using the **Next Page** or **Previous Page** buttons at the end of a page

Mandatory details

Use this form to add or remove a staff member or amend their existing details. Existing staff details can be found on the 'Contacts attached to registration' report.

We only require this form to be completed for the setting main contact, staff who require an Online Provider Portal account and the Designated Safeguarding Lead.

Guidance to complete the form can be found here.

Title	● Miss ○ Mrs ○ Ms ○ Mr
Other title please specify	
Forename	Jane
Surname	Doe
Date of birth	17/07/1993
Start date	22/03/2025

If you are removing a member of staff, please input the date below.

Date member of staff left	

If you are adding or updating a member of staff, click 'Next Page'.

For records being removed only

By submitting this form I understand that;

- Online Provider Portal account functionality will be removed and deleted if not associated with any other registration.

- The data will be held and processed in line with our data retention policies.

If you are removing a member of staff you can click 'Submit Form'.
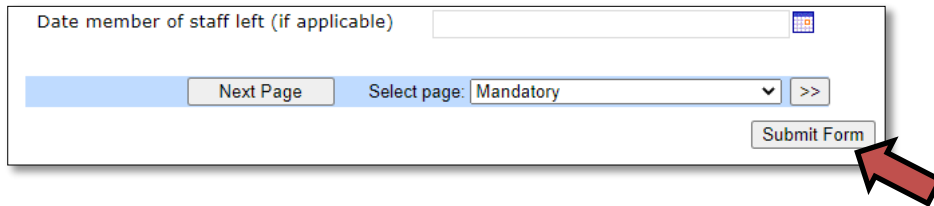
Next Page Select page: Mandatory details >>

Submit Form

FIS Provider Portal - Part of the Synergy FIS Suite

Submitting your form to us

5. When you have completed all pages of the form press the **Submit Form** button.
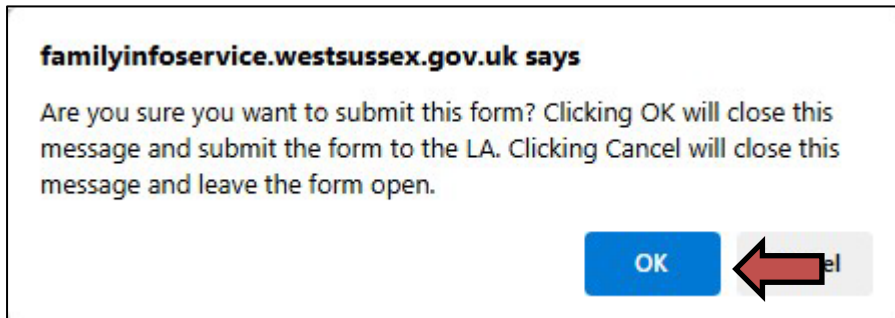

6. A pop up will appear. Click OK.
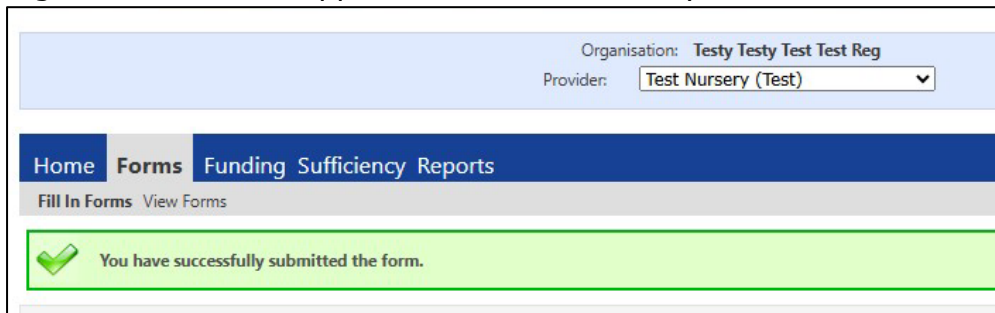
7. A green banner will appear and confirms that your form has been submitted.
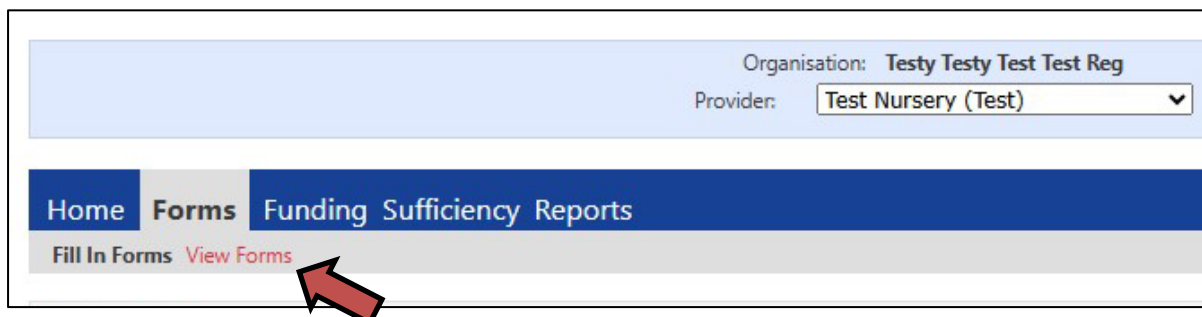
Changing or checking a submitted form

You can check if you have submitted a form, and edit it if we have not yet authorised it

8. Go to **View Forms** in the **Forms** sub menu.

9. Look for your last submitted Staff Update form. You can do this by checking the date and time next to each form.
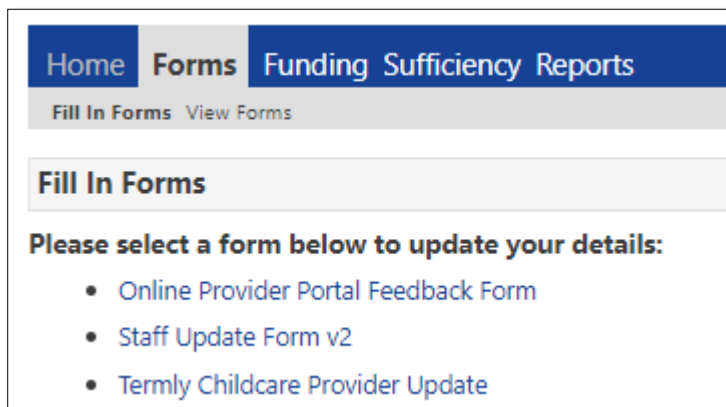
10. If the form shows as:
    - o **Pending** – your form has been submitted but we have **not** yet processed your form. You can edit it by clicking it but remember to click 'submit form' again otherwise we won't see your changes
    - o **Authorised** – we have accepted the form. You cannot edit it – submit a new form instead
    - o **Rejected** – we have rejected the form. You cannot edit it – submit a new form instead

If no form shows, it has not been submitted. Complete and submit a new form.

THIS IS THE END OF THIS GUIDANCE DOCUMENT

If you have any feedback for how this guidance could be improved, you can complete an Online Provider Portal Feedback Form found under Forms on the OPP.

END