Synergy User Guide

For Approved Training Centres (ATC)

v18.1

Contents

Introduction

Synergy is Safety Training Awards' online system utilised by Awaring Organisation (AO) staff and Approved Training Centre (ATC) personnel.

The system is used to assist Approved Training Centres (ATCs) with providing:

- A centralised place to store and update ATC information and administrative documents;
- A communication tool for ATCs to connect with their centre administrators, and for Safety Training Awards to keep ATCs up-to-date with the latest information more easily;
- The ability to interact with Safety Training Awards by submitting policy forms electronically, such as tutor agreements, reasonable adjustment requests, conflict of interest disclosures and more;
- The capability to perform and interact electronically with all quality assurance tasks, such as IQA activities and EQA monitoring;
- A document library to keep their centre personnel up-to-date with the latest information and resources;
- Access to information about Safety Training Awards' qualification portfolio, including qualification specifications, documents and other resources;
- The ability to manage their sites, tutors, assessors and users of the system;
- Access to view the risk and compliance status of their ATC.

Synergy uses **forms** as a way for ATCs and Safety Training Awards to communicate with each other, for example:

- If an organisation wishes to become an Approved Training Centre (ATC);
- For an ATC to advise Safety Training Awards of Malpractice;
- For an Internal Quality Assurer (IQA) or External Quality Assurer (EQA) to undertake their quality assurance tasks;
- If an ATC wishes to apply to deliver additional qualifications.

This document will provide a step by step guide on how forms are utilised, along with how ATC personnel can interact with all other functions Synergy provides.

STA Online

It is important to note that Synergy is used to undertake all administrative tasks whilst holding Approved Training Centre (ATC) status with Safety Training Awards with the exception of registering courses, learners and issuing certificates.

STA Online is utilised to provide Registration / Certification (reg / cert) functionality to ATC personnel enabling the registration of courses, learners and submitting results.

As Synergy and STA Online are separate systems, log in details for one system will not allow access to the other.

System Requirements

The system is web-based so can be accessed via **https://synergy.creatiogreen.com/** at any location provided an internet connection is available.

Certain technical requirements are in place to ensure users benefit from the best possible experience. **Technical requirements can be found here**.

System Security

Synergy is a system provided and monitored by a third-party provider, **Creatio**.

User information, and its security, is important to us. Synergy, and the underpinning systems which provide this functionality hold a range of IT security accreditations, including ISO27001 (the international IT security standard) to safeguard the information entered into the system.

Regular penetration tests are provided by a third party to check for vulnerabilities to ensure system security is upheld.

Data Protection

Please see the relevant Privacy Policies below for information on how we collect, use and secure user information:

STA Privacy Policy

Creatio Privacy Policy

Getting Setup and Logging-in

An initial log in will be set up for an ATC when they wish to apply for Approved Training Centre (ATC) status with Safety Training Awards, however additional users and their corresponding log in details for ATC personnel are issued internally within the ATC.

If a user has been set up on Synergy, they will first receive an email advising them as such, providing them with:

1. A link to sign in;
2. Their username;
3. Their temporary password.

To successfully activate their account they must click the sign in link and log in using the credentials shown within the email.

Upon successful login, they are required to set a new password.

Passwords must be:

- At least 8 characters long;
- Include at least one capital letter;
- Include at least one number.

Once a new password has been created, they will be taken to the **Home** screen ready to use Synergy.

Home Screen

The home screen is the default page every user is shown upon login to Synergy (screenshot below).

Each section on the home page (above) has been numbered to provide a summary of each functionality (below) however this document contains in depth information on how to use all parts of the system:

1. **Home (button)** – When clicked, takes the user back to the home screen (screenshot above);

2. **My Centre (button)** – When clicked, allows the user to view various details of the ATC including address, risk rating and audited records;

3. **Documents (button)** – When clicked, allows the user to view the documents library, showing documents added by both ATC personnel and AO staff;

4. **Users (button)** – When clicked, allows the user to administrate, add and delete users of Synergy;

5. **Sites (button)** – When clicked, allows the user to administrate, add and delete sites allocated to the ATC;

6. **Staff (button)** – When clicked, allows the user to administrate, add and delete staff allocated to the ATC;

7. **Qualification Library (button)** – When clicked, takes the user to the qualification library, showing full details of Safety Training Awards' qualifications and technical information;

8. **My details (button)** – When clicked, shows the personal details, including access rights of the logged in user;

9. **Log out (button)** – When clicked, logs out the user;

10. **Inbox (tab)** – When clicked, shows all forms requiring action;

11. **Actions (tab)** – When clicked, shows all open actions allocated to the ATC;

12. **Start a new … (section)** – Allows the user to open and start a new form;

13. **Safety Training Awards Documents Requiring Acceptance (section)** – Shows the user any important documents that require acceptance;

14. **Closed Forms (section)** – Shows all forms that have been closed;

15. **Key Safety Training Awards Documents (section)** – Allows direct access to key / important documents provided by Safety Training Awards.

The buttons and sections detailed above may not appear for every user dependant on the users' access rights.

Forms

Synergy uses **forms** as a way for ATCs and Safety Training Awards to communicate with each other.

Depending on the form, they can be opened and / or closed by either ATC personnel or Safety Training Awards.

The forms contained within Synergy are as follows:

Opened by Safety Training Awards

(i.e. only Safety Training Awards can create these forms)

- External Quality Assurance (EQA) Monitoring Visit Plan Form;
- External Quality Assurance (EQA) Monitoring Visit Report Form;
- Report of Suspected Malpractice (AO) Form.

Opened by ATC Personnel (dependant on access rights)

(i.e. only ATC Personnel can create these forms)

- Approved Training Centre (ATC) Agreement Form;
- Additional Qualification Approval Form;
- Conflict of Interest Disclosure Form;
- Tutor Agreement Form;
- IQA Agreement Form;
- Internal Quality Assurance (IQA) Performance Report Form;
- Action Response Form;
- Reasonable Adjustments and Special Considerations Form;
- Enquiries About Results Form;
- Report of Suspected Malpractice (Centre) Form.

The following pages detail what the purpose of each form is and their attributes.

'Approved Training Centre (ATC) Agreement' Form.

The **Approved Training Centre (ATC) Agreement** form is used by an **Active / Unrecognised** ATC to apply for approved ATC status.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Approved Training Centre (ATC) and Site Details	Mandatory	ATC
2	Personnel Details	Mandatory	ATC
3	Third Party and Contracting Arrangements	Mandatory	ATC
4	Policies and Requirements	Mandatory	ATC
5	Qualifications	Mandatory	ATC
6	Final Declaration	Mandatory	ATC
7	Additional Information Required by AO	Optional	Safety Training Awards
8	Additional Information Provided by ATC	Optional	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to AO	ATC	• Clicked when ATC has completed sections 1-6. • Submits application to AO.
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 7, if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 8, if required. • Submits application back to AO.
Approved	Safety Training Awards	• Clicked when all information contained within sections 1-6 and 8 are approved. • Notifies ATC of outcome.
Rejected	Safety Training Awards	• Clicked when information contained within sections 1-6 and 8 are rejected. • Notifies ATC of outcome.

'Additional Qualification Approval' Form.

The **Approved Training Centre (ATC) Agreement** form is used by an **Active / Recognised** ATC to apply to deliver further qualifications not originally specified within the **Approved Training Centre (ATC) Agreement** form.

Form Flow

Opened by:	ATC	Closed by:	**Safety Training Awards**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Application Scope and Purpose	Mandatory	ATC
2	Staff and Physical Resources	Mandatory	ATC
3	Qualification Delivery	Mandatory	ATC
4	Declaration	Mandatory	ATC
5	Additional Information Required by AO	Optional	Safety Training Awards
6	Additional Information Provided by ATC	Optional	ATC
7	AO Internal Review	Mandatory	Safety Training Awards
8	Outcome	Mandatory	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to AO	ATC	• Clicked when ATC has completed sections 1-4. • Submits application to AO.
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 5, if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 6, if required. • Submits application back to AO.
Approved	Safety Training Awards	• Clicked when all information contained within sections 1-4 and 6 are approved. • Notifies ATC of outcome.
Rejected	Safety Training Awards	• Clicked when information contained within sections 1-4 and 6 are rejected. • Notifies ATC of outcome.

'Conflict of Interest Disclosure' Form.

The **Conflict of Interest Disclosure** form is used by an **Active / Recognised** ATC to disclose whether the ATC has or has no conflict of interest.

Form Flow

Opened by:	ATC	Closed by:	**Safety Training Awards**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Conflict of Interest Disclosure	Mandatory	ATC
2	Additional Information Required by AO	Optional	Safety Training Awards
3	Additional Information Provided by ATC	Optional	ATC
4	Outcome	Mandatory	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Disclosure to AO	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 2, if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 3, if required. • Submits application back to AO.
Approved	Safety Training Awards	• Clicked when all information contained within sections 1 and 3 are approved. • Notifies ATC of outcome.
Rejected	Safety Training Awards	• Clicked when information contained within sections 1 and 3 are rejected. • Notifies ATC of outcome.

'Tutor Agreement' Form.

The **Tutor Agreement** form is used by an **Active / Recognised** ATC. All STA Tutors must sign a Tutor Agreement in order to begin Tutoring and / or Assessing Safety Training Awards qualifications.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Tutor Agreement	Mandatory	ATC

Buttons

Button Title	Responsibility	Action
Submit Agreement	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.
Approved	Safety Training Awards	• Clicked when all information contained within section 1 are approved. • Notifies ATC of outcome.
Rejected	Safety Training Awards	• Clicked when information contained within section 1 is rejected. • Notifies ATC of outcome.

'IQA Agreement' Form.

The **Tutor Agreement** form is used by an **Active / Recognised** ATC. All STA Tutors must sign a Tutor Agreement in order to begin Tutoring and / or Assessing Safety Training Awards qualifications.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	IQA Agreement	Mandatory	ATC

Buttons

Button Title	Responsibility	Action
Submit Agreement	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.
Approved	Safety Training Awards	• Clicked when all information contained within section 1 are approved. • Notifies ATC of outcome.
Rejected	Safety Training Awards	• Clicked when information contained within section 1 is rejected. • Notifies ATC of outcome.

'Internal Quality Assurance (IQA) Performance Report' Form.

The **Internal Quality Assurance (IQA) Performance Report** form is used by an **Active / Recognised** ATC to enable an Internal Quality Assurer to perform their quality assurance activity.

Form Flow

Opened by:	ATC	Closed by:	**Safety Training Awards**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Performance Report Specifics	Mandatory	ATC
2	Assessor Observation	Optional	ATC
3	Tutor Observation	Optional	ATC
4	Desk-Based Sampling	Optional	ATC
5	Learner Interview Record	Optional	ATC
6	Additional Information Required by AO	Optional	Safety Training Awards
7	Additional Information Provided by ATC	Optional	ATC

Buttons

Button Title	Responsibility	Action
Submit IQA Report to AO	ATC	- Clicked when ATC has completed section 1 - 5. - Submits application to AO.
Acknowledge	Safety Training Awards	- Clicked when all information contained within sections 1 – 5 and 7 are approved. - Notifies ATC of outcome.
Request Additional Info from IQA	Safety Training Awards	- Clicked when AO has completed section 6, if required. - Submits application back to ATC.
Submit Additional Info to AO	ATC	- Clicked when ATC has completed section 7, if required. - Submits application back to AO.

'External Quality Assurance (EQA) Monitoring Visit Plan' Form.

The **External Quality Assurance (EQA) Monitoring Visit Plan** form is used by an STA External Quality Assurer (EQA) to prepare an **Active / Recognised** ATC for their upcoming EQA visit.

Form Flow

Opened by:	**Safety Training Awards (EQA)**	Closed by:	**Safety Training Awards (EQA)**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	General Details	Mandatory	Safety Training Awards (EQA)
2	Resource Availability Requirements	Mandatory	Safety Training Awards (EQA)
3	Confirmation	Mandatory	ATC

Buttons

Button Title	Responsibility	Action
Submit Plan to ATC	Safety Training Awards (EQA)	• Clicked when EQA has completed sections 1 - 2. • Submits application to ATC.
Respond to AO	ATC	• Clicked when ATC has completed section 3. • Notifies ATC of outcome.
Respond to ATC	Safety Training Awards (EQA)	• Clicked when section 3 is not yet agreed. • Submits application back to ATC.
Acknowledge	Safety Training Awards (EQA)	• Clicked when ATC has completed sections 1 – 2 and section 3 has been agreed. • Submits application back to ATC.

'External Quality Assurance (EQA) Monitoring Visit Report' Form.

The **External Quality Assurance (EQA) Monitoring Visit Report** form is used by an STA External Quality Assurer (EQA) to undertake quality assurance activity for an **Active / Recognised** ATC.

Form Flow

Opened by:	**Safety Training Awards (EQA)**	Closed by:	**Safety Training Awards (EQA)**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Section One - Approved Training Centre (ATC) Specifics	Mandatory	Safety Training Awards (EQA)
2	Section Two - Previous Action Plan	Mandatory	Safety Training Awards (EQA)
3	Section Three - Management Systems and Admin Arrangements	Mandatory	Safety Training Awards (EQA)
4	Section Four - Resources (Physical and Staff)	Mandatory	Safety Training Awards (EQA)
5	Section Five - Assessment	Mandatory	Safety Training Awards (EQA)
6	Section Six: Internal Quality Assurance	Mandatory	Safety Training Awards (EQA)
7	Section Seven: Learners Sampled	Mandatory	Safety Training Awards (EQA)
8	Section Eight: Learners Feedback	Mandatory	Safety Training Awards (EQA)
9	Section Nine: Action Plan for Centre	Mandatory	Safety Training Awards (EQA)

No.	Section Title	Mandatory / Optional	Responsibility
10	Section Ten: Actions for External Quality Assurer / AO	Mandatory	Safety Training Awards (EQA)
11	Section Eleven: Additional Information	Optional	Safety Training Awards (EQA)
12	ATC Confirmation	Mandatory	ATC
13	Centre Feedback (Optional)	Optional	ATC

Buttons

Button Title	Responsibility	Action
Submit Report to ATC	Safety Training Awards (EQA)	• Clicked when EQA has completed sections 1 - 10. • Submits application to ATC and AO.
Refer Back to EQA	ATC	• Clicked when ATC has completed section 12. • Submits application to EQA.
Finalise and Close Form	Safety Training Awards (EQA)	• Clicked when sections 1 – 10 and 12 are completed. • Notifies ATC of outcome.

'Action Response' Form

The **Action Response** form is used by an **Active / Recognised** ATC to notify their designated External Quality Assurer (EQA) of completion / revisions to their action points.

Form Flow

Opened by:	**ATC**	Closed by:	**Safety Training Awards (EQA)**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Action Details	Mandatory	ATC
2	AO Response	Mandatory	Safety Training Awards (EQA)

Buttons

Button Title	Responsibility	Action
Submit to AO	ATC	• Clicked when ATC has completed section 1. • Submits application to ATC and AO.
Return to ATC	Safety Training Awards (EQA)	• Clicked when EQA has completed section 2. • Submits application to ATC.
Actions Unchanged	Safety Training Awards (EQA)	• Clicked by EQA when no changes have been made to action points. • Notifies ATC and closes the form.
Action Details Updated	Safety Training Awards (EQA)	• Clicked by EQA when changes have been made to one or more action points. • Notifies ATC and closes the form.
Action(s) Signed-off	Safety Training Awards (EQA)	• Clicked by EQA when actions have been signed off. • Notifies ATC and closes the form.

'Reasonable Adjustments and Special Considerations' Form

The **Reasonable Adjustments and Special Considerations** form is used by an **Active / Recognised** ATC to apply for a reasonable adjustment or special consideration for one of more of their learners.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Reasonable Adjustment / Special Consideration Details	Mandatory	ATC
2	Additional Information Required by AO	Optional	Safety Training Awards
3	Additional Information Provided by ATC	Optional	ATC
4	Outcome	Mandatory	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to AO	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 2, if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 3, if required. • Submits application back to AO.
Granted	Safety Training Awards	• Clicked when all information contained within sections 1 and 3 are approved. • Closes form and notifies ATC of outcome.
Not Granted	Safety Training Awards	• Clicked when information contained within sections 1 and 3 are rejected. • Closes form and notifies ATC of outcome.

'Enquiries About Results' Form

The **Enquires About Results** form is used by an **Active / Recognised** ATC to question a decision regarding learner results or their assessment.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Enquiry Details (Stage One)	Mandatory	ATC
2	Additional Information Required by AO	Optional	Safety Training Awards
3	Additional Information Provided by ATC	Optional	ATC
4	Enquiry Details (Stage One) – Outcome	Mandatory	Safety Training Awards
5	Enquiry Details (Stage Two)	Optional	ATC
6	Enquiry Details (Stage Two) – Outcome	Optional	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to AO	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.

Button Title	Responsibility	Action
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 2 (for stage one) or section 5 (for stage two), if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 3, if required. • Submits application back to AO.
Application Approved	Safety Training Awards	• Clicked when all information contained within sections 1 and 3 are approved. • Closes form and notifies ATC of outcome.
Stage One Rejected	Safety Training Awards	• Clicked when information contained within sections 1 and 3 are rejected. • Closes form and notifies ATC of outcome.
Stage Two Rejected	Safety Training Awards	• Clicked when information contained within sections 1 and 3 are rejected. • Closes form and notifies ATC of outcome.
Accept Stage One Outcome	ATC	• Clicked if ATC is happy with the decision within section 'Enquiry Details (Stage One) – Outcome'. • Closes form and notifies AO.
Proceed to Stage Two	ATC	• Clicked if ATC is wishes to appeal the decision within section 'Enquiry Details (Stage One) – Outcome' and progress onto section 'Enquiry Details (Stage Two).

'Report of Suspected Malpractice (AO)' Form

The **Report of Suspected Malpractice (AO)** form is used by Safety Training Awards to communicate suspected malpractice with the ATC.

Form Flow

Opened by:	**Safety Training Awards**	Closed by:	**Safety Training Awards**

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Malpractice Details	Mandatory	Safety Training Awards
2	Reply Provided by ATC	Mandatory	ATC
3	Response by AO to ATC Comments	Mandatory	Safety Training Awards
4	Outcome	Mandatory	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to ATC	Safety Training Awards	• Clicked when AO has completed section 1. • Submits application to ATC.
Provide Reply to AO	ATC	• Clicked when ATC has completed section 2. • Submits application back to AO.
Provide Response to ATC	Safety Training Awards	• Clicked when AO has completed section 3. • Notifies ATC of response.
Submit Outcome to ATC and Close	Safety Training Awards	• Clicked when AO has completed section 4. • Closes form and notifies ATC of outcome.

'Report of Suspected Malpractice (Centre)' Form

The **Report of Suspected Malpractice (Centre)** form is used by ATC's to communicate suspected malpractice to Safety Training Awards.

Form Flow

Opened by:	ATC	Closed by:	Safety Training Awards

Sections

No.	Section Title	Mandatory / Optional	Responsibility
1	Malpractice Details	Mandatory	ATC
2	Additional Information Required by AO	Optional	Safety Training Awards
3	Additional Information Provided by ATC	Optional	ATC
4	Outcome	Mandatory	Safety Training Awards

Buttons

Button Title	Responsibility	Action
Submit Application to AO	ATC	• Clicked when ATC has completed section 1. • Submits application to AO.
Request Additional Info from ATC	Safety Training Awards	• Clicked when AO has completed section 2, if required. • Submits application back to ATC.
Submit Additional Info to AO	ATC	• Clicked when ATC has completed section 3, if required. • Submits application back to AO.
Submit Outcome to ATC and Close	Safety Training Awards	• Clicked when AO has completed section 4. • Closes form and notifies ATC of outcome.

Creating a Form

ATC personnel can create a form via the **Home Screen** by using the **Start a new…** section. Hovering over each form will give a short description as to what the form is to be used for (screenshot below).
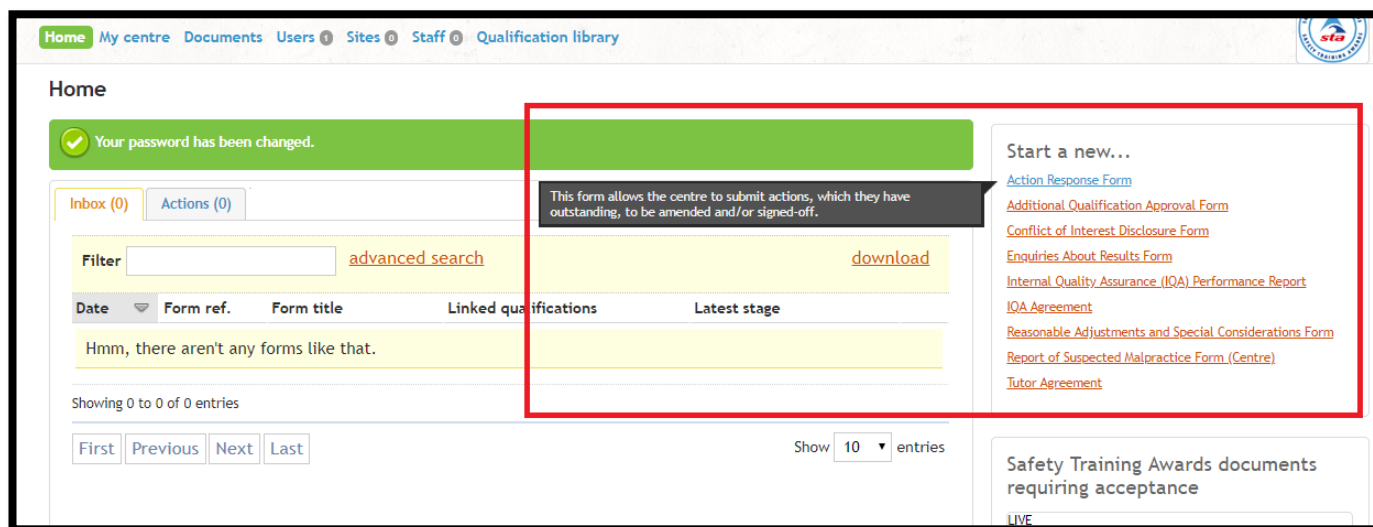
Clicking a form will open the initial form creation page. Depending on the form, certain fields may appear requesting users to select information from drop down lists before beginning the form (screenshot below).

Clicking the **Create Form** button will take users to the form allowing them to make edits.

For this example, we will be completing a **Conflict of Interest Disclose Form** to advise Safety Training Awards that our ATC **Brett's Training Centre** does not have any conflict of interest to disclose.

The edit form screen is split into five different sections (screenshot on the following page):

1. Form information;
2. Form sections;
3. Form questions;
4. Public comments;
5. Private comments.

1/ Form Information

This section details the name of the form being worked on and who currently has control of it (i.e. who requires to undertake an action on it at the current time).

2/ Form Sections

This section details all sections within the form along with:

- Whose responsibility it is to edit the section;
- Status of the section (i.e. the last time it was edited and by who).

Note: Not all sections are required to be completed. On the example above, the section titled **Additional Information Required by AO** is not a mandatory section and can be skipped if required.

3/ Form Questions

This section holds all the questions and information entered into the form.

There are series of different question formats, which include:

- Free text entry;
- Upload a document;

- Time / date fields;
- Checkbox selections (single and multiple);
- ATC specific fields requiring the user to select information from a drop-down list (for example: **Identify yourself:** requiring the user to select ATC personnel, who are recorded against the ATC from a drop-down list).

As already mentioned not all questions are required to be completed. For questions that are optional, the word **(optional)** will be displayed at the end of the question.

4/ Public Comments

Public comments is a functionality whereby any messages added to this section can be read by both Safety Training Awards and ATC personnel.

5/ Private Comments

Private comments is a functionality whereby any messages added to this section by Safety Training Awards can only be viewed by other Safety Training Awards users who have access to the form. This also applies for messages added to this section by ATC personnel.

When creating a form ATC personnel will be taken to the form edit screen allowing them to edit the form questions within the first form section. Upon completing a form section, click the **Save Changes** button to save the information entered. This will then take the user to the form overview page.

Users will notice that the section **Conflict of Interest Disclosure** section has now been updated to show that is been edited by Brett Preston at a specific time and date.

Looking at our form format guide on page 13, we now know that we can click the **Submit Disclosure to AO** button to submit the form to Safety Training Awards.

Submitting the form has now removed it from the **Inbox** located on the **Home** screen and put the form back into the hands of Safety Training Awards waiting for a response.

Receiving a Form

Forms that have been submitted and require a user's action appear in the **Inbox** located on the **Home** screen. However, an email notification will be received advising users that they have a new form awaiting their attention.

As the screenshot, shown on the next page, the **Conflict of Interest Disclosure Form** has now re-appeared in the **Inbox**.

Clicking the form row will take user to the form overview screen.

The form overview screen will show information updates detailing the stages the form has been through. The screenshot, below, shows the **Form History** box **(1)** showing the latest updates. The **Form Sections** area **(2)** will also show any updated edits / amendments.

The screenshot above shows the **Form History** box **(1)**, which shows the **Request Additional Info from ATC** button has been clicked on 22/10/2018 at 13:07:32. It also shows the section **Additional Information Required by AO** section **(2)** has been updated giving information of when it was last edited and by whom. It also shows there is **1 unread comment**.

Clicking the section takes the user back to the edit form screen.

As we know, there is one unread comment, this can be accessed by clicking the **Public Comments** or **Private Comments** tabs as mentioned previously.

The **Additional Information Required by AO** section requests that the next section **Additional Information Provided by ATC** is to be completed by ATC personnel and gives instructions on which button to click once the additional information has been provided.

Looking at our form format guide on page 13, completing this section and clicking the **Submit Additional Info to AO** button will submit the form back to Safety Training Awards, removing it from the users' **Inbox**.

Completing a Form

The aim of forms is essentially to complete them from start to finish. As different forms are opened by either Safety Training Awards or ATC personnel, this is also the case for closing the form.

Looking at our form format guide on page 13, the **Conflict of Interest Disclosure Form** is closed by Safety Training Awards.

Now the section **Additional Information Provided by ATC** has been completed, it seems Safety Training Awards have completed the final section titled **Outcome** and have closed the form. Users will know this as they will have been notified via email.

As the form has been closed, it will no longer appear within the user's **Inbox** however to view the form, and to see the updated information entered from Safety Training Awards, users can now access this from the **Home** screen within the **Closed Forms** section (screenshot below).

When clicking into the form ATC personnel will see the sentence **This form has been completed! (Approved.)** and can see the detail entered into the final section completed by Safety Training Awards, for any actions required.

The form has now been successfully completed from start to finish, whereby its details have been recorded for auditing purposes and available to view for reference in future.

The form format guides listed within this document starting from page 8 will provide assistance when completing other forms within Synergy.

My Centre

The **My Centre** area provides ATC personnel with the ability to view information for their ATC.

When on the **My Centre** screen, it will show the following tabs:

- Centre details;
- Qualifications;
- AO contact;
- Risk;
- Compliance;
- Notes.

Centre Details

This tab shows the following information regarding the ATC:

- ATC Name;
- Status of the ATC (Recognised / Not Recognised);
- Main location / address;
- ATC Number;
- Accounts / finance address and contact details;
- Time Zone;

- ATC Website;
- Insurance cover details;
- 3rd party / contracting details;
- Other AO approval information;
- Previous DCS issues;
- Co-ordinator name and contact details.

Note: Users are not eligible to amend this information, however if any information shown is thought to be incorrect, users should contact their Centre Administrator.

Qualifications

This tab shows all qualifications the ATC is eligible to deliver. The following additional information is also shown:

- Qualification title and associated reference numbers – clicking the qualification title will take users to the qualification summary page which details full specifications and technical information.
- Status flags:
  - o Approval (Approval active / Approval suspended);
    - ▪ This status flag will determine whether the qualification is registerable via STA Online.
  - o Registrations (Registrations active / Registrations suspended);
    - ▪ This status flag will determine whether ATC personnel can register learners against the qualification via STA Online.
  - o Certifications (Certifications active / Certifications suspended).
    - ▪ This status flag will determine whether the ATC holds DCS status for the specific qualification. **Note:** Learner **c**ertificates via STA Online will not be automatically available if the status flag states **Certifications suspended**.
- Staff allocation – shows which staff (added via the **Staff** functionality) are allocated against the qualification.

*ATC personnel can apply for additional qualifications to be added to the ATCs eligibility list by completing the **Additional Qualification Approval Form**.*

AO Contact

Shows contact information for the following, should users require to get in touch:

- Assigned Centre Administrator;
- External Quality Assurer (EQA);
- STA Regional Office;
- IT Support.

Risk

Shows the risk values set by Safety Training Awards against the ATC, for the following:

- Assessment arrangements;
- Centre management and resource arrangements;
- External quality assurance arrangements;
- Internal quality assurance arrangements.

Compliance

Shows the compliance values set by Safety Training Awards against the ATC, for the following:

- Assessment delivery;
- Centre management and resources;
- External quality assurance;
- Internal quality assurance;
- Learner experience.

Notes

Records all notes entered by both Safety Training Awards and ATC personnel.

Documents

Synergy provides a document area which is split into two sections:

1. Documents uploaded by Safety Training Awards;
2. Documents uploaded by ATC personnel.

Clicking the **Documents** header menu within Synergy takes the user to the **Documents** area.
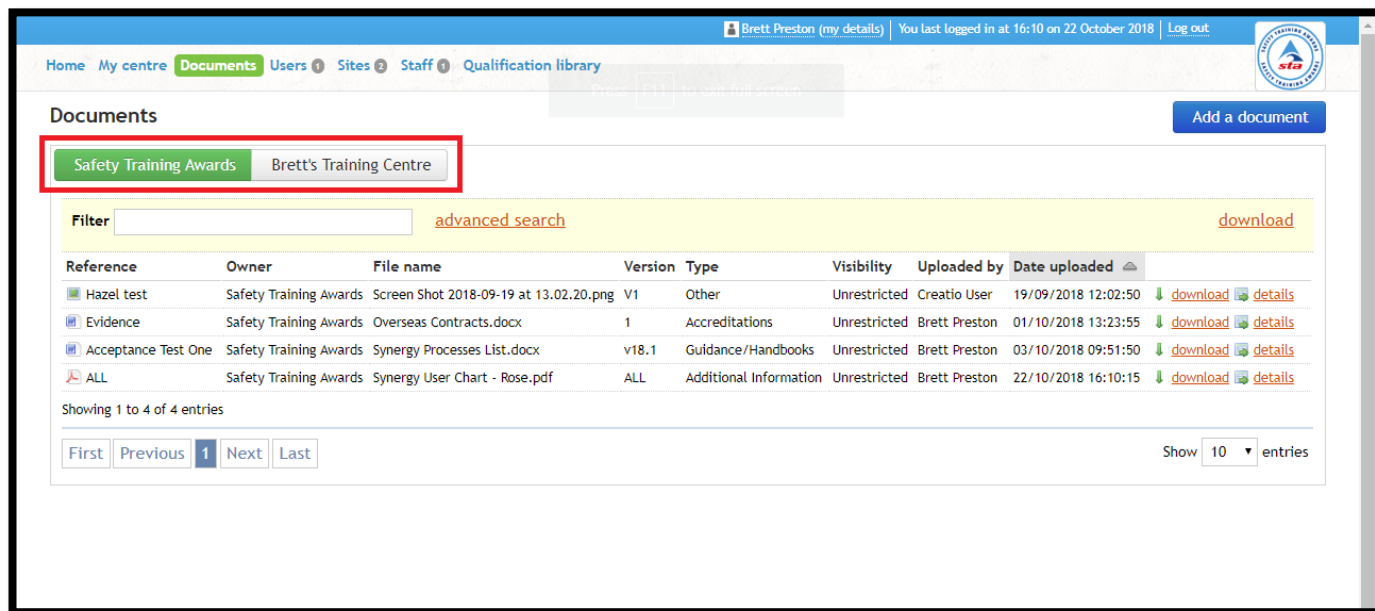
Two buttons are located, shown in the screenshot above titled:

1. Safety Training Awards;
2. {ATC NAME}.

Documents uploaded by Safety Training Awards

Clicking the **Safety Training Awards** button will show all documents which have been uploaded by Safety Training Awards and shared with the ATC.

Documents are displayed in a table showing the following columns:

- Reference – Displays the document reference;
- Owner – Displays the owner (i.e. Safety Training Awards);
- File name – Displays the document filename;
- Version – Displays the current version of the document;
- Type – Displays the document type (as selected during upload);
- Visibility – Displays whether the document has been uploaded and given the setting of 'Unrestricted' or 'Restricted';
- Uploaded by – Displays the user name who has uploaded the document;
- Date uploaded – Displays the date the document was uploaded;

- Download (button) – Downloads the document to the user's device;

- Details (button) – Shows the documents attributes and an option to download the document to the user's device.

Additional Functions

The following functions are also available within this area:

- Filter – Typing in this field will automatically refine the documents shown within the document table accordingly;

- Download All – Clicking the **Download** link located within the yellow header downloads an Excel spreadsheet detailing a full document list and its attributes as shown within the document table;

- Advanced Search – This functionality allows users to refine their search using a variety of different search criteria.

Documents uploaded by ATC

Clicking the **{ATC NAME}** button will show all documents that have been uploaded by ATC personnel.

Documents are displayed in a table showing the following columns:

- Reference – Displays the document reference;

- Owner – Displays the owner (i.e. ATC NAME);

- File name – Displays the document filename;

- Version – Displays the version of the document;

- Type – Displays the document type (as selected during upload);

- Visibility – Displays whether the document has been uploaded and given the setting of 'Unrestricted' or 'Restricted';

- Uploaded by – Displays the name of the user who has uploaded the document;

- Date uploaded – Displays the date the document was uploaded;

- Download (button) – Downloads the document to the user's device;

- Details (button) – Shows the documents attributes and an option to download the document to the user's device.

Additional Functions

The following functions are also available within this area:

- Filter – Typing in this field will automatically refine the documents shown within the document table accordingly;

- Download All – Clicking the **Download** link located within the yellow header downloads an excel spreadsheet detailing a full document list and its attributes as shown within the document table;

- Advanced Search – This functionality allows the user to refine their search using a variety of different search criteria.

Add a Document

ATC personnel have the ability to add a document by clicking the **Add a Document** button from within the **Documents** area.

To add a single document to the document area the following fields must be completed:

- Document Reference – free text entry field;
- Document Version – free text entry field;
- Description – free text entry field;
- Document Type – drop down selection;
- Document Upload – facility enabling the selection of the document.

Documents must be under 25Mb in order for upload to be successful.

Upon completing the fields above and clicking the **Upload this Document** button, the user is taken back to the document table now showing the new uploaded document.

If users require to add multiple documents to the documents area, there is a facility to do this by clicking the **Add multiple documents** tab within the **Add a Document** page.

Documents uploaded by ATC personnel can be viewed by other ATC personnel and Safety Training Awards.

Users

The **Users** area within Synergy allows ATC personnel to add, edit and delete user accounts associated with the ATCs Synergy area.

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*A user account is directly linked to a log in to the ATCs Synergy area and must not be confused with **Staff**.*

The main **User** area will show all users that have been allocated against, and given a login for access, to the Synergy system, in a list view giving the following information:

- Name – The name of the user;

- Job Title – The job title of the user;

- User Type – What user status they hold, see below for further information;

- Status – Whether the user's login is **Active** or **Inactive**;

- Date Created – Shows the date the login was created;

- Last Accessed – Shows the date the login was last accessed.

Clicking on the **Details** link shown next to each user will take ATC personnel to the user record.

The following functions are also available within the main user area:

- Filter – Typing in this field will automatically refine the users shown within the user table accordingly;

- Download – Clicking the **Download** link located within the yellow header downloads an excel spreadsheet detailing a full user list and its attributes as shown within the user table;

- Advanced Search – This functionality allows the user to refine their search using a variety of different search criteria.

User Types

The following show the user types available when adding a user throughout Synergy:

Super User

- Allocated to:
  - Co-ordinator;
  - Administrators;
  - Users who hold a similar role.
- Access rights:
  - Forms – Read / Write;
  - Actions – Read Only;
  - Documents – Read / Write;
  - Users – Read / Write;
  - Sites – Read / Write;
  - Staff – Read / Write;
  - Qualification Library – Read Only.

Senior Manager

- Allocated to:
  - ATC Management;
  - Users who hold a similar role.
- Access rights:
  - Forms – Read / Write;
  - Actions – Read Only;
  - Documents – Read / Write;
  - Users – N/A;
  - Sites – Read / Write;
  - Staff – Read / Write;
  - Qualification Library – Read Only.

General User

- Allocated to:
  - Site Contact;
  - Tutor / Assessor;
  - Internal Quality Assurer (IQA);
  - General Users Requiring Read Only Access.
- Access rights:
  - Forms – Read Only or Read / Write (giving access to IQA Report Form);
  - Actions – Read Only;
  - Documents – N/A;
  - Users – N/A;
  - Sites – Read Only;
  - Staff – Read Only;
  - Qualification Library – Read Only.

Adding a User

To add a user against the ATC, click the **Add a User** button located top right of the main **Users** area. ATC personnel will be asked to select which type of user they are creating. Select the user type accordingly, using the above information for assistance.

Users will be taken to the user record. The user record details all user information and is split into two tabs:

- Personal Details;
- Documents.

Personal Details

Within this tab, the following fields are shown – titles shown in **bold** signify a mandatory field:

- **First Name;**
- **Surname;**
- Job Title;
- Telephone Number;
- **Email Address;**
- **Tick Box – When ticked this tick box confirms ATC personnel have made the user aware that they are providing their details and that Safety Training Awards will be using and processing their data in accordance with the Privacy Policy;**
- Time zone.

Roles

Roles determine what forms the user being set up can see:

1. In the **Start a new …** section within the **Home** screen of their account;
2. In the **Closed Forms** section within the **Home** screen of their account;
3. Within their **Inbox** section within the **Home** screen of their account;
4. Within the **Advanced Search** function list.

Appropriate roles will be displayed within the **Roles** section depending on whether the user is being set up as a **Super User**, **General User** or **Senior Manager**.

Role titles will comprise of:

{A FORM TITLE} – {USER TYPE IT APPLIES TO} – {READ ONLY OR READ / WRITE}

An example would be:

Action Response Form – General User – (Read Only)

Selecting this role would give the General User in question the ability to access and view the **Action Response Form** (in the four places listed on the previous page) however they would not be able to edit the sections as Read / Write access is not given.

Alternatively, not selecting this role AND if no role is available giving Read / Write status the general user in question would not see any correspondence to an **Action Response Form** at all.

Only Super Users and Senior Managers have the ability to edit user roles.

Once ATC personnel have entered all appropriate information and set the necessary roles clicking the **Save Changes** button completes the action.

The user will now be sent an email giving them log in instructions to access their Synergy account. ATC personnel will also be taken back to the main **User** area.

Editing a User and Additional Functions

To edit a user's details or roles, simply click the **Details** link next to the user from the main **Users** area. Amend the details as required and click the **Save Changes** button to confirm.

Additional functions are provided when clicking into a user's record, detailed below:

Deactivate this User

Clicking this button will deactivate the user account, disabling their login and removing them from the user list.

Change User Type

Clicking this button will display the following screen requesting which user type ATC personnel would like to change the specific user's account to:

Once a specific user type has been selected, the user account will be updated accordingly, changing the users account type.

Reset Password

Clicking this button will prompt a password reset email to be sent to the user allowing them to reset their password if it has been forgotten.

*The additional functionalities list above is only available to ATC personnel with the user type of **Super User** or **Senior Manager**.*

Safety Training Awards are unable to de-activate, change a user type or reset an ATCs user account. All requests must go through ATC personnel.

Sites

ATC personnel must detail all sites they operate at. This can be done from the **Sites** area which can be navigated to by clicking the **Sites** menu option.

The **Sites** area within Synergy allows ATC personnel to add, edit and delete sites associated with the ATC.

The main **Sites** area will show all sites which have been allocated against the ATC showing the following information:

- Site Name – The name of the site;

- Details (link) – Clicking this allows users to see further details regarding the site and to make any necessary changes;

- Delete (link) – Clicking this removes the site from the list.

The following functions are also available within the main **Sites** area:

- Filter – Typing in this field will automatically refine the sites shown within the site list accordingly.

Adding a Site

To add a site against an ATC, click the **Add a Site** button within the yellow bar located towards the top of the main **Sites** area.

Users will then be taken to the site record with the following fields shown – titles shown in **bold** signify a mandatory field:

- Site Contact Member Number;

- **Site Name;**

- **Site Contact Name;**

- **Site Contact Tel;**

- **Site Contact Email;**

- **Site Address;**

- **Postcode;**

- **Country;**

- **Tick Box – When ticked this tick box confirms ATC personnel have made the site aware that they are providing their details and that Safety Training Awards will be using and processing their data in accordance with the Privacy Policy.**

Once users have entered all appropriate information click the **Add Site** button to finish.

Sites added to Synergy require additional checking by Safety Training Awards' staff before they appear on STA Online and eligible for a course to be registered against the site. This usually takes one working day.

Editing a Site

To edit a site's details, simply click the **Details** link next to the site from the main **Sites** area. Amend the details as required and click the **Save Changes** button to confirm.

Staff

The **Staff** area within Synergy allows ATC personnel to add, edit and delete staff associated with the ATC. This can be done from the **Staff** area which can be navigated to by clicking the **Staff** menu option.

*A staff user must be either a **Tutor**, **Assessor** or an **Internal Quality Assurer (IQA)**. Staff do not get set up with a login and must not be confused with **Users**. If someone who has been added to **Staff** requires a login, they must be added as a **User** also.*

The main **Staff** area is split into two tabs:

1. Staff to quals;
2. Quals to staff.

Staff to Quals Tab

This area will show all staff which have been allocated against the ATC, in a list type view giving the following information:

- Staff Name – The name of the staff member;
- Details (link) – Clicking this allows users to see further details regarding the staff member and to make any necessary changes;
- Delete (link) – Clicking this removes the staff member from the list;
- Qualification links (link) – Detailed further in this section.

Filter fields are also available within the main **Staff** area enabling users to filter the staff by:

- Title;
- Qualification Type;
- Qualification Level;

- Staff Member Name or Ref;

- Role.

Adding Staff

To add staff members against the ATC, click the **Add a staff member** link within the yellow bar located towards the top of the main **Staff** area.

Add a staff member   ✖

Personal details   Relevant achievements   Documents

First name

Address

Last name

Email address

Postcode

Member number (optional)

Country

Please select   ▼

Notes (optional)eg other relevant competence or experience details

Please tick to confirm you have made the user aware that you are providing their details to your organisation and we will be using and processing their data in accordance with our published data use / privacy policy.
☐

Add staff member   or cancel

Users will be taken to the staff record with the following fields shown assigned over three sub tabs – titles shown in **bold** signify a mandatory field:

- **Personal Details;**
  - **First Name;**
  - **Last Name;**
  - **Email Address;**
  - Member Number;
  - **Address;**
  - **Postcode;**
  - **Country;**

- o Notes;

- o **Tick Box – When ticked this tick box confirms ATC personnel have made the user aware that they are providing their details and that Safety Training Awards will be using and processing their data in accordance with the Privacy Policy.**

- Relevant Achievements;

    - o This section allows ATC personnel to upload any qualifications the staff member may have.

- Documents;

    - o This section allows ATC personnel to upload copies of any qualifications they have added to the **Relevant Achievements** tab. **Note**: Copies must be uploaded from the **Staff Edit** screen once the staff member has been added, and not during adding a staff member for the first time.

Once all appropriate information has been entered click the **Add Staff Member** button to finish. ATC personnel will be taken back to the main **User** area.

Qualification Links

Staff members must be linked to the qualifications the ATC is eligible to deliver, this is to ensure Safety Training Awards are aware of which qualifications each staff member is delivering and their role in relation to qualification(s).

To add links to qualifications for a staff member click the **Add / remove links to quals** link. This will open a window showing all qualifications the ATC is eligible to deliver for each of the three deliverable roles:

- Tutor;

- Assessor;

- Internal Quality Assurer (IQA).

Select the tick box next to the appropriate role(s) next to each relevant qualification and click the **Finished!** button to confirm.

This will take ATC personnel back to the main **Staff** area. Clicking the **X qualifications** link located next to the **Add/remove links to quals** will show the chosen selections, (example below):
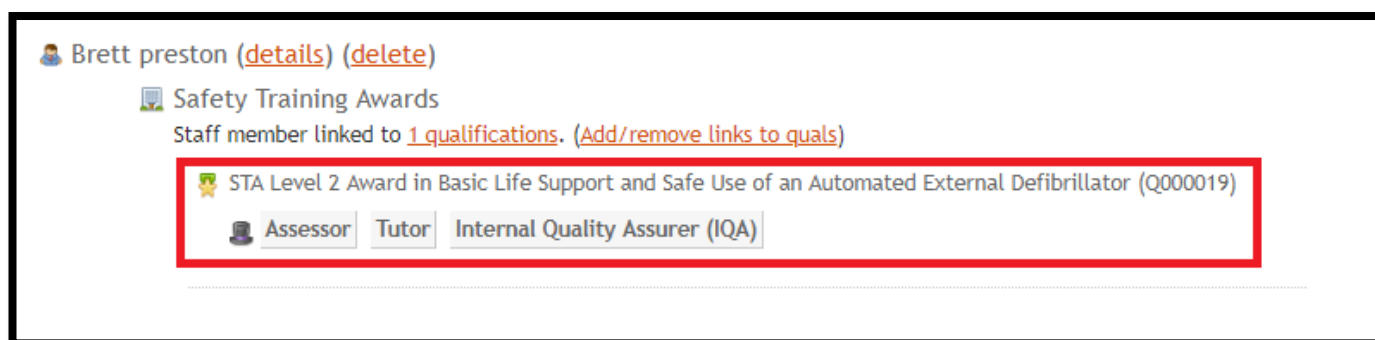
Each role allocated next to a qualification will show as a tile, as shown with the **Assessor**, **Tutor** and **Internal Quality Assurer (IQA)** tiles in the example above.

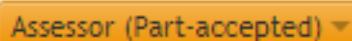*Staff, and their associated qualification links, added to Synergy require additional checking by Safety Training Awards before they appear on STA Online and are eligible for a course to be registered against the Tutor / Assessor. This usually takes one working day.*
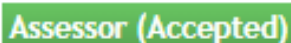
A title, example below, signifies the staff member has not yet been acknowledged:

Assessor

A tile, example below, signifies the staff member has been acknowledged by Safety Training Awards, however, they are outstanding information, usually a Tutor / IQA Agreement. Until the outstanding information is provided they will not be eligible to be registered against courses via STA Online.

Assessor (Part-accepted) ▾

A tile, example below, signifies the staff member has been acknowledged by Safety Training Awards and is available to be registered against courses via STA Online:

Assessor (Accepted)

When making changes to staff roles, additional checks will take place by Safety Training Awards before they appear on STA Online.

Editing a Staff Member

To edit a staff member's details, simply click the **Details** link next to the staff member from the main **Staff** area. Amend the details as required and click the **Save Changes** button to confirm.

Quals to Staff Tab

This area will show all the qualifications the ATC is eligible to deliver and the ability to view all the staff currently allocated against each qualification by clicking the **Show** link.

This is an alternative view from the list shown on the **Staff to Quals** tab.

Qualification Library

The **Qualification Library** area within Synergy allows ATC personnel to view all available qualifications in Safety Training Awards' portfolio. ATC personnel can view the qualification library by clicking the **Qualification Library** menu option.

Qualifications are listed in a table giving the following information:

- Qualification type – Shows the type of qualification (i.e. **RQF**);

- Qualification level – Shows the qualification level;

- Title – Shows the qualification title;

- Qualification Number – Shows the qualification number;

- Approval / Sanction Status – Shows whether the ATC has either Approval or Sanction status for the specific qualification;

- Status – Shows the status of the qualification (i.e. is still an active qualification or is no longer accredited).

Clicking the **Details** link next to a qualification will take ATC personnel to the **Qualification Details** page, detailed below.

The following functions are also available within the main **Qualification Library** area:

- Search – Typing in this field will automatically refine the qualifications shown within the qualification list accordingly;

- Download (link) – Clicking this link will download an excel spreadsheet detailing all information shown on the qualification list.

Qualification Details

This screen is split into four sub tabs and its purpose is to provide all information the ATC requires in relation to Safety Training Awards qualifications.

A summary of what information is shown in each tab is detailed below:

Details (tab)

- Shows general information for the qualification such as **Qualification Review Date**, **Learner Entry Requirements** and **Credit Total**.

Structure (tab)

- Shows the structure of the qualification. ATC personnel are able to click either the **Details** or **View** buttons next to each component to see further information such as a units learning outcomes.

Documents (tab)

- Shows any official Safety Training Awards documents associated with this qualification which would be of assistance to the ATC.

Other Details (tab)

- Shows any other details added by Safety Training Awards in relation to the qualification.

Other Functions

The following functions are available, which are located to the top right of the main **Qualification Library** area:

Print Units

Clicking this button opens a printer friendly document showing all unit details contained within the qualification, allowing ATC personnel to easily print the document.

Print

Clicking this button opens a printer friendly document showing all overall qualification details, allowing the ATC personnel to easily print the document.

Support

Safety Training Awards is committed to providing support to all customers regarding its qualifications, services and associated systems.

Please see below for further contact information:

Main Contact Details

Safety Training Awards
Anchor House
Birch Street
Walsall
WS2 8HZ

Tel: +44 (0)1922 645097

Email: **info@safetytrainingawards.co.uk**

Opening Hours: 08:00 – 17:00 BST - Monday – Friday

Dedicated Contact Details

Dedicated contact details can be located via Synergy, tailored to each ATC.

To access:

1. Log into Synergy;
2. Click the **My Centre** menu option;
3. Select the **AO Contact** tab option.

Websites

Safety Training Awards - **https://www.safetytrainingawards.co.uk/**

STA Online – **https://online.sta.co.uk/**

System Feedback

Safety Training Awards is constantly striving to improve the services it provides its customers. Feedback regarding systems is welcomed and should be emailed to **digitalservices@sta.co.uk**.