

Family Children Centre QUICK GUIDE ADDING 1-2-1 CONTACTS

This guide will steer you through:

- A) Adding Contact via Telephone calls.
- B) Adding Case Notes
- C) Adding Contact Home Visits



Getting Started

Signing in

Sign into the Synergy system using your login ID and Password.

Click the **Continue** button from the Welcome splash screen!

Synergy

Sign In

TLTDOM\Halleyne

.....

Click here to sign in

➔ Sign In

Synergy_Test
Version 20.1.00480
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Hackney

WELCOME TO HACKNEY'S CHILDREN'S CENTRE SYSTEM

Enjoy using it

Continue

Click to continue

The Schedule Screen

From the Children's Centre Scheduler page. *If you cannot see this page do reference the **Getting Started guide** featured in the Resource area of the Services for Schools website.*

The screenshot shows a web browser window with the URL <https://testportal.learningtrust.co.uk/Test/CaseManagement/>. The page title is "Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.3.0.414". The navigation bar includes "Desktop", "Event", "Admin", "Actions", and "Log off". A search bar is present on the right. The main content area is titled "Children's Centre Session Schedule" and displays a calendar for "March 2021". The calendar has tabs for "Day", "Agenda", "Week", "Month", and "Filter". The calendar grid shows days of the week (Mon to Sun) and dates. Four teal-colored events labeled "Breastfeeding Drop In" are scheduled for the following dates: Wednesday, March 3; Wednesday, March 10; Wednesday, March 17; and Wednesday, March 24. The date March 30 is highlighted in yellow. A mouse cursor is visible over the date March 13.

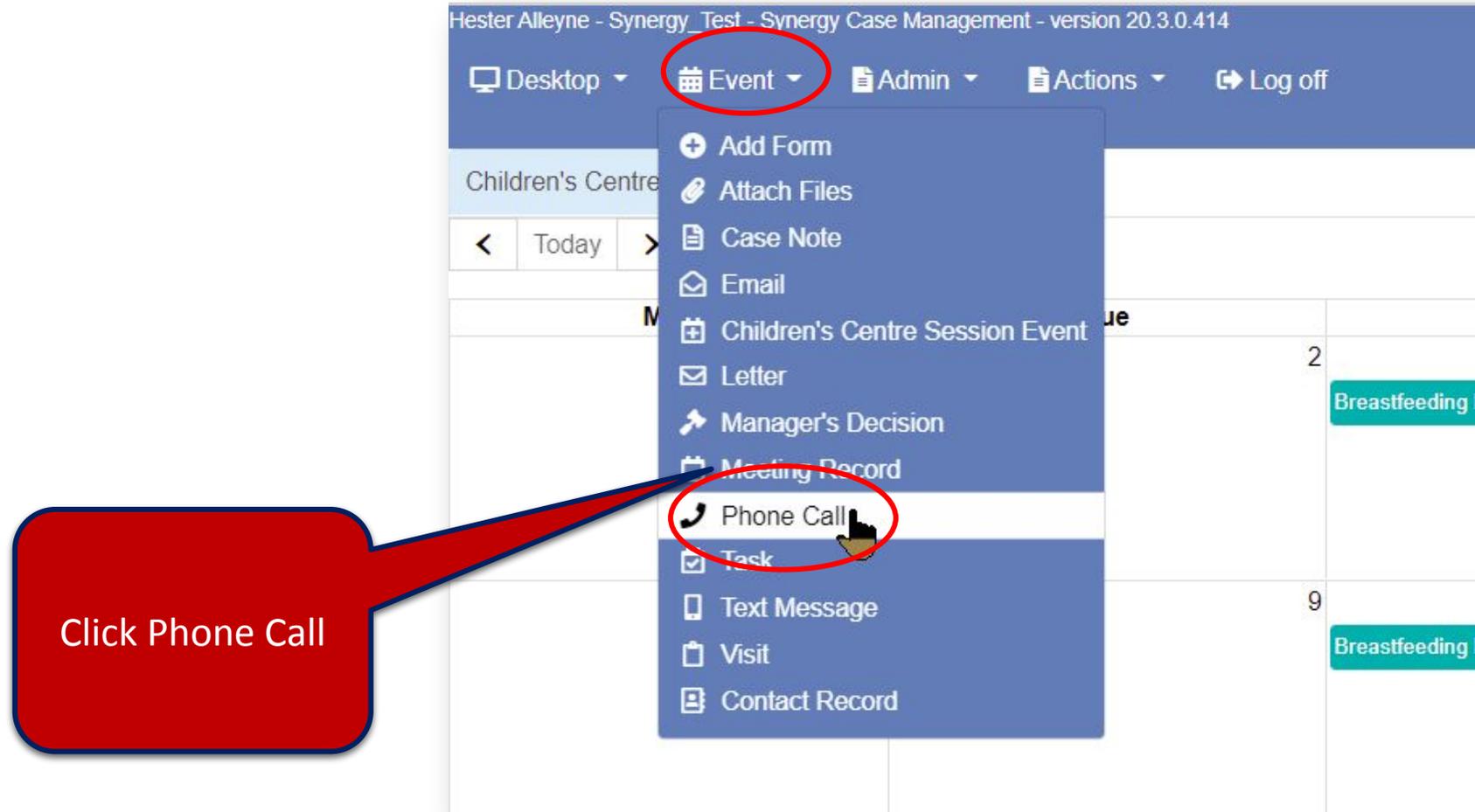
| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----------------------------|-----|-----|-----|-----|
| 1 | 2 | 3 Breastfeeding Drop In | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 Breastfeeding Drop In | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 Breastfeeding Drop In | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 Breastfeeding Drop In | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

The Scheduler Screen

A) Adding your contact via Telephone Call



- Click Event ☐ Phone Call



Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.3.0.414

Desktop ▾ **Event ▾** Admin ▾ Actions ▾ Log off

- + Add Form
- 📎 Attach Files
- 📄 Case Note
- ✉ Email
- 📅 Children's Centre Session Event
- ✉ Letter
- ➔ Manager's Decision
- 📅 Meeting Record
- 📞 **Phone Call**
- ☑ Task
- 📱 Text Message
- 📅 Visit
- 📄 Contact Record

Children's Centre

< Today >

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2

Breastfeeding D

9

Breastfeeding D

Click Phone Call

Adding your contact via Telephone Call continued

- Complete all mandatory fields, these are depicted with an * and appear highlighted. Reference page 6

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.3.0.414

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Search 🔍

Children's Centre Session Schedule ✕ Case Note ✕ **Phone Call ✕**

Assign to Children's Centre

Family Centre *
Project *
Activity
Session

Phone Call

Call Type * Incoming Outgoing

From *
Start Date *
30/03/2021 16:29

Phone Call Type
RR Category *
Phone Call

Concerning *

Phone Call details

Subject *
Message Details *

Family Centre Outcomes + Add Row

| Concerning | Outcome Date | Outcome Type | Main Outcome | Status | Outcome Notes |
|----------------------|--------------|--------------|--------------|--------|---------------|
| No new notifications | | | | | |

Adding your contact via Telephone Call continued

- From the fields presented complete:

| Field | Description |
|-------------------------------------|---|
| Family Centre* | Choose the family centre, i.e. <i>Ann Tayler</i> |
| Project* | Select the correct Project Type and assigned activity i.e. EH TARGETED FAMILY SUPPORT PLEASE ENSURE YOU SELECT THE RIGHT ONE – REFERENCE THE LIST IN THE RESOURCE AREA ON THE HACKNEY SERVICES FOR SCHOOLS WEBSITE. Children Centres Project & Activity Names |
| Contacted by | Choose who made the contact i.e. Ibukun |
| Activity & Session fields | Leave these fields blank |
| PHONE CALL: Incoming Outgoing | You can do either for the example in this training session choose Outgoing |
| From* | This field usually defaults to your name you must change field to the person who made the call. |
| To* | Complete the To field and type who it was too. No need to enter the family name just the name of the person for example – ‘Parent-Mother’ |
| Start Date | Enter the date the telephone call was made. If you are unsure of the date populate with today’s date. |

| Field | Description |
|-------------------------------|--|
| RR Category* | This field feeds through to the family record – do ensure what is in this field matches the Project Type. By default it shows Phone Call, change this to match the project type i.e. EH Targeted family support. NOTE THIS MUST MATCH THE PROJECT TYPE FIELD ABOVE. |
| PHONE CALL DETAILS Subject | Enter what the subject of the call, basic information i.e. to discuss family support plan. Note if you are adding any kind of support into the case management system never enter confidential notes – The synergy system is not a case management tool and will not be used to hold family support data. |
| Message details | Basic information i.e. to check in with the family as this was a telephone call. |
| Concerning* | BE SURE TO CONDUCT A THOROUGH SEARCH TO FIND THE CORRECT FAMILY. Select who are the family you are adding this contact too.. Click the Search button, click People and type the family name i.e. Johnson. With the members of the family listed in the results field Choose the the family and/or family member the call was about |

- Click **Save** options located on the menu bar at the top left of the screen, below the open tabs. The Saved Successfully message appears.

NOTE: If you receive an error when saving check you have completed all the mandatory *fields.

Adding your contact via Telephone Call continued

To check you have saved the data and it is added into the system

- Go to **Person Search** and check the family name i.e. in this example type Johnson.
- Select the name of the family from the results presented.
- From the left hand side of his profile screen, click on **Running record**.
- In the middle panel at the top you will see details of the phone call made.

The image consists of two screenshots from a software application. The first screenshot shows a search interface with a search bar at the top right containing the text 'Johnson'. Below the search bar is a table of search results. The second screenshot shows the profile page for 'Johnson, Boris (64)'. The 'Running Record' section is highlighted, and a list of records is displayed.

Search Results Table:

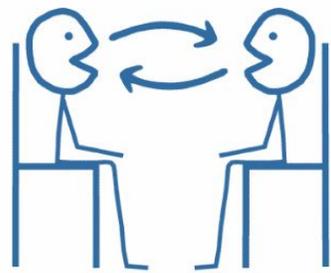
| Sys Ref | First Name | Middle Name | Family Name | DOB | Address | Family Centre Catchments | Status |
|---------|------------|-------------|-------------|------------|---|--------------------------|--------|
| 64 | Boris | | Johnson | 01/01/1980 | 1 - 13 Ann Taylor Centre, Triangle Road, E8 3RP | | |
| 65 | Teresa | | Johnson | 02/02/1982 | 1 - 13 Ann Taylor Centre, Triangle Road, E8 3RP | | |
| 66 | Darren | | Johnson | 20/05/2018 | 1 - 13 Ann Taylor Centre, Triangle Road, E8 3RP | | |
| 67 | Betty | | Johnson | 10/10/2020 | 1 - 13 Ann Taylor Centre, Triangle Road, E8 3RP | | |

Running Record Table:

| Category | Date |
|----------------|------------|
| Telephone Call | 03/03/2021 |
| Visit | 03/03/2021 |
| One to one | 03/03/2021 |
| test | 03/03/2021 |
| Visit | 03/03/2021 |
| One to one | 03/03/2021 |

B) Adding Case Notes

Use the face to face record case note option if you were meeting with a family in the Centre, ie. This could be a family support contact, for the collections of vitamins or rose vouchers, or a one off midwife visit (not an anti natal clinic)



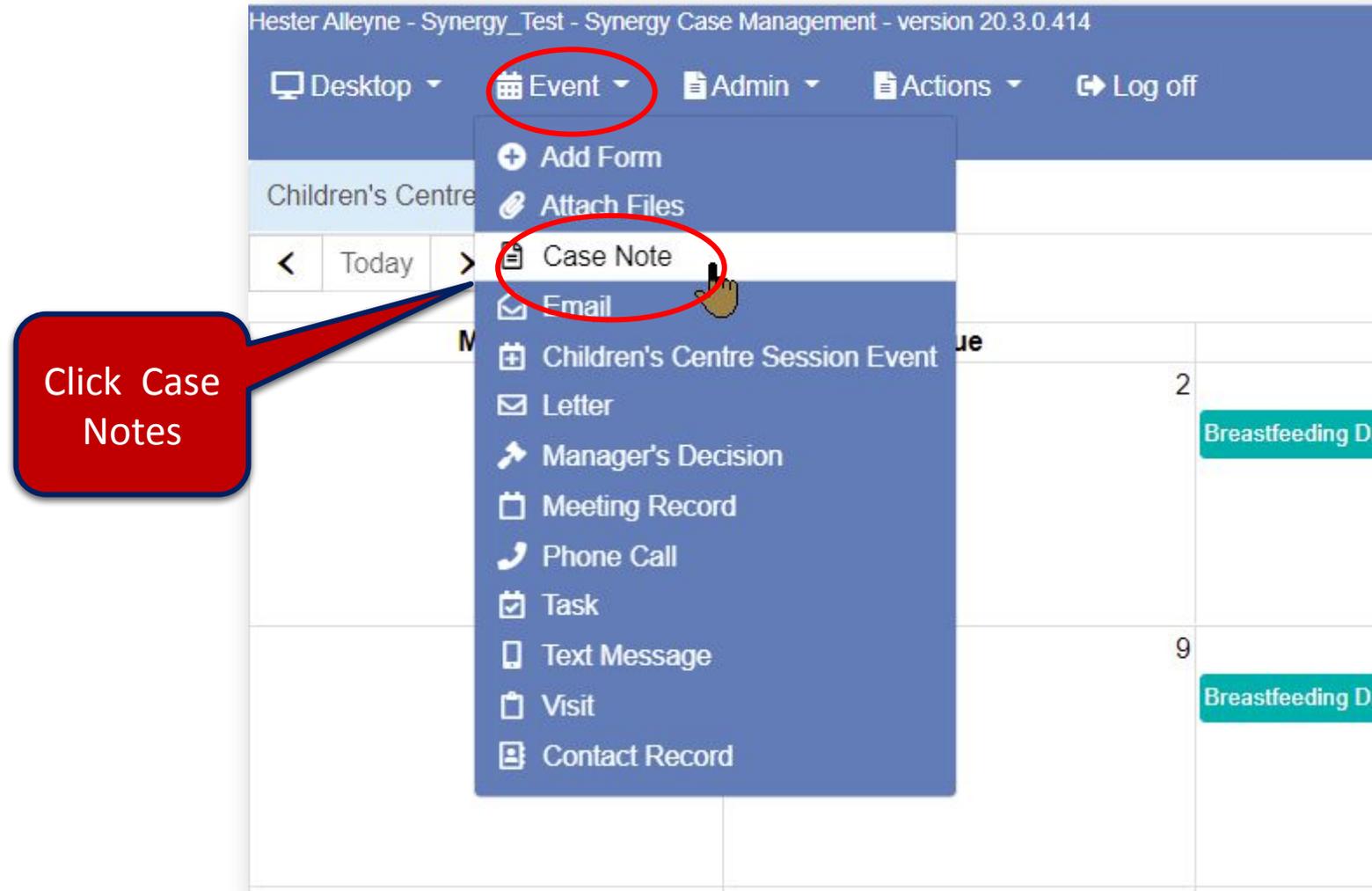
Children's Centre Session Schedule

March 2021

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|-----|-----|-----------------------------|-----|-----|-----|-----|
| 1 | 2 | 3 Breastfeeding Drop In | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 Breastfeeding Drop In | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 Breastfeeding Drop In | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 Breastfeeding Drop In | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1 | 2 | 3 | 4 |

Adding your contact via Case Note continued

- Click **Event** \square **Case Notes**. This screen is similar to the Telephone Call screen discussed earlier in these notes.



Adding your contact via Case Notes continued

- Complete all mandatory fields, these are depicted with an * and appear highlighted – reference page 11.

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.3.0.414

Desktop Event Admin Actions Log off

Search

Children's Centre Session Schedule X Case Note X

Case Note Save Cancel

Assign to Children's Centre :

Family Centre *

Project *

Activity

Session

Contacted By

Case Note

Entered By *
Hester Alleyne

Note Type *

Start Date *

RR Category *
Case Note

Concerning *

Significant

Case Note details

Summary *

Notes *

Family Centre Outcomes + Add Row

| Concerning | Outcome Date | Outcome Type | Main Outcome | Status | Outcome Notes |
|------------|--------------|--------------|--------------|--------|---------------|
|------------|--------------|--------------|--------------|--------|---------------|

Filter

Adding your contact via Case Note continued

- From the fields presented complete:

| Field | Description |
|------------------------------|---|
| Family Centre* | Choose the family centre, i.e. Ann Tayler |
| Contacted by | Select who made the contact with the family |
| Project* | Select the correct Project from the list presented Type and assigned activity i.e. VITAMIN DISTRIBUTION PLEASE ENSURE YOU SELECT THE RIGHT ONE – REFERENCE THE LIST IN THE RESOURCE AREA ON THE HACKNEY SERVICES FOR SCHOOLS WEBSITE. Children Centres Project & Activity Names |
| Activity Session | Leaves these fields blank |
| CASE NOTES Entered by | Type the name of the person who is entering the information into the system |

| Field | Description |
|-----------------------------------|---|
| Note Type | Only select and use the option Case Record |
| Start date* | Enter the date the distribution took place and was collected. |
| RR Category* | Select the option that matches the Project category the same as selected from the Project field, i.e. VITAMIN DISTRIBUTION |
| CONCERNING Search | Use Search to select the person who collected the vitamins |
| CASE NOTE DETAILS Summary* | Enter a brief description that would prove helpful i.e. collected children's vitamins drops |
| Notes* | Add anything that would prove helpful |

- Click **Save** options located on the menu bar at the top left of the screen, below the open tabs. The Saved and completed successfully message appears.

NOTE: If you receive an error when saving check you have completed all the mandatory *fields.

Adding your contact via Case Notes continued

To check you have saved the data and it is added into the system

- Go to **Person Search** and click **People** from the left panel Search options.
- Enter the family name in the **Family Name** field.
- Click the name of the family from the results presented.
- From the left hand side of his profile screen, select **Running record**.
- In the middle panel at the top you will see details stating for example the vitamins drops have been collected.

The screenshot displays a web application interface for case management. The top navigation bar includes a search bar and a 'Log off' button. The main content area is divided into several sections:

- Person Profile:** Shows the name 'Johnson, Teresa (65)', DOB '02/02/1982', and address '1 - 13 Ann Taylor Centre, Triangle Road, E8 3PP'.
- Running Record:** A list of activities with a red circle highlighting the entry 'Collected children's vitamin drops' dated '03/03/2021'. Other entries include 'Visit' and 'One to one meeting with family in the...'. The 'Running Record' tab is selected in the left-hand navigation menu.
- Case Note:** Details for a case note completed by 'Vare, Gemma (15)' on '03/03/2021'. It includes fields for 'Entered By', 'Start Date', 'Note Type', and 'RR Category'.
- Concerning:** Lists individuals involved: 'Johnson, Teresa (65); Johnson, Darren (66); Johnson, Betty (67)'. A 'Significant' checkbox is present.
- Case Note details:** A 'Summary' field containing the text 'Collected children's vitamin drops'.
- Notes:** A section for 'Collected vitamin drops' with a 'Specific Notes' field.

C) Adding your contact for Home Visit



- Click **Event** **Visit**

Carry out the same process as outlined from pages 4-12.

- From the **Project** field choose the project type ***EH-Targeted Family Support***
- From the **Visit Type** field choose ***Home Visit***
- From the **Running Record** field ensure it matches the project type, click the drop down box and choose ***EH-Targeted Family Support***.
- Select the **Concerning** field to search and select family member(s)
- Use the **Summary details** field to enter general information – never enter confidential data
- Complete the **Visit Details** field i.e. ***Early Visit***
- Leave blank **Child Seen**, **Specific Notes** and **Family Outcomes** field
- **Save** your data, perform your check to ensure the data appears in the family's running record. See page 12.

