

Family Children Centre QUICK GUIDE RELATIONSHIPS







Logging in

Getting Started

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

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



Creating Relationships

This guide takes you through the setting up of family relationships. NOTE: If you are unfamiliar with the screens that appear we would advise you go through the Level 1 training guide available in the Level 1 Training Guide on the HSS website.



Use Search

• Click Person Search → People

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Searching continued

- Type the family name using the First Name and Family Name field then click the **Search** button. The member record appears.
- From the search result click the number alongside the record in the **Sys Ref** field.

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Click on the Sys								
Ref number shown								

The Family Maintenance Options

• The family information record appears on the screen. Click the Family Maintenance button.

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Locating the Family Group reference number...

- From the Family Maintenance screen you can see information about a specific family member and no one else
- You will notice in this screen an area for Current Groups with a system reference. This is the Family Group Number

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	postcode: address from:		Click the System 1986
	· · · · · · · · · · · · · · · · · · ·		Reference Number

Working with the Family Group...

• Click the Family Group number opens the screen below, displaying all details of other Family Members in the Family.

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			Trump (79)				
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	Trump, Sarah (78);	12/02/1986		· 30/03/202*	1		
	Family Group Employn	nent Status					T Filter
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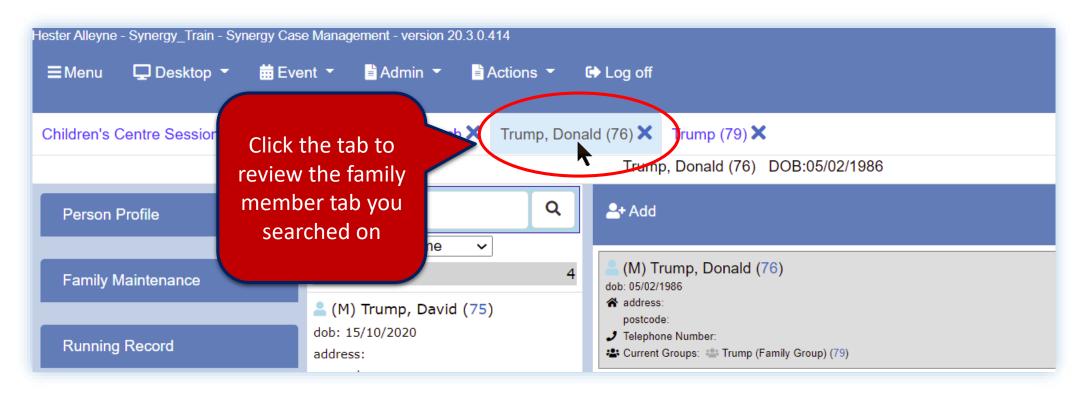
Grouping members into correct relationships...

• To group members into their correct relationships you need to use their System Reference Numbers that is visible alongside each family member name.

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Selecting family members...

- Leaving the screen open or you can write down the numbers alongside each of the family members, these numbers are key.
- Go back to the original family member screen which should be open as a tab at the top of the screen.



Using the Add button to add family members...

• Click the Add option at the top of the window.



Entering the sys reference number...

• From the banner that appears at the top of the screen type a system reference number and click Search

lf you want	to add an existing pe	rson to the family list, and	you know the S	ys Ref , you can enter it here. 78	Q Sea	rch Im
Create	person					
First N	lame		Middle Name		Enter the system ref number for	
Family	Name				the family	
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Using the Search option...

• From the banner that appears at the top of the screen type a system reference number and click Search

If you want to add ar	n existing person to the family list, and	you know the Sys Ref , you can enter it here	re. 78 Q Search
This id is already in th	he family list		
🔳 💄 (F) Trump, Sa	arah (78) dob: 12/02/1986		
Create person		The family	
First Name		member appears	
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Add new or existing family members...

• Continue adding the rest of the reference numbers – in this example a new family member was created to add this member click the Add button. All family names appear in the middle panel of the screen

Person found Select 'add' to bring them in to the list add _ (M) Trump, Mick (80) dob: 24/02/1980	If you want to add an existing person to the family list, and you know the Sys Ref, you can enter it here.	80	Q Search
🖸 add 🔷 (M) Trump, Mick (80) dob: 24/02/1980	Person found. Select 'add' to bring them in to the list		
	🖸 add 💄 (M) Trump, Mick (80) dob: 24/02/1980		

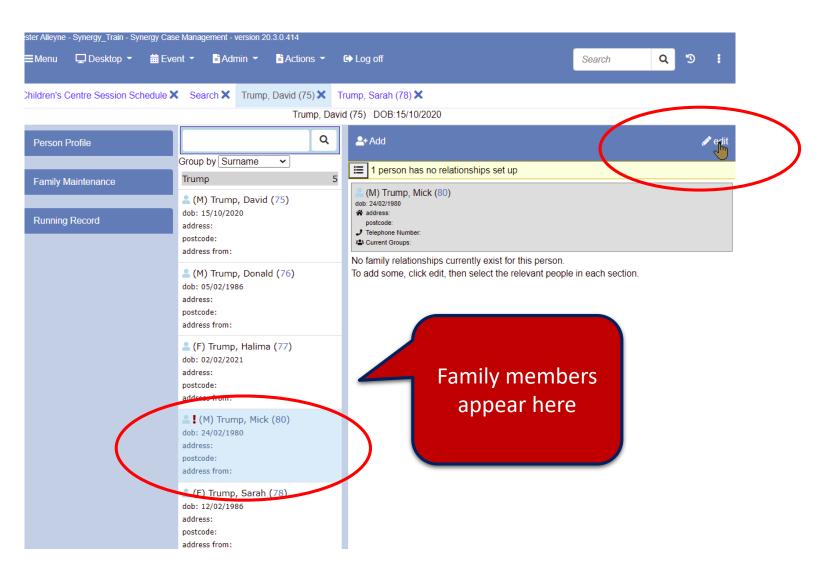
Using the middle pane to see family members...

• Family members details appears in the middle panel of the screen – click the **Cancel** button.

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		Trump, David (75) DOB:15/10/2020				
Person Profile	Group by Surname	If you want to add an existing person to the family list, and you know the Sys Ref , you can enter it here. 80	Q Search			
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	postcode: address from: (M) Trump, Donald (76) dob: 05/02/1986 address: postcode: address from: (F) Trump, Halima (77) dob: 02/02/2021 address: postcode: address from:	First Name Middle Name Family members that you are building a relationship with appear in this pane.				
	 (M) Trump, Mick (80) dob: 24/02/1980 address: postcode: address from: (F) Trump, Sarah (78) dob: 12/02/1986 address: postcode: address from: 	•		Cr	ancel	

Using the Edit button...

- Click on a family member record from the middle panel.
- Then click the Edit button



Using Add button to create the relationship...

• You can now add the members of the family in the middle panel to setup the relationship. Click the **Add** button.

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	Trump, David (75) DOB:15/10/2020	
Person Profile Family Maintenance Running Record		ist for this person.

Steps to creating the relationship

- From the Add new relationship panel click the drop down arrow alongside the Add* field and choose the family member you wish to add
- Check the **As** field i.e. Partner.
- Click the **Add** button bottom right hand corner of the screen.
- Continue adding relationships i.e. children, step siblings etc. by clicking the Add new button.
- Once you have added all the relationships **save** the changes, the screen comes back and tells you the relationship changes have been made.

<u>NOTE</u>: If you need to remove relationships this can be one also by clicking the relevant buttons.

- Be sure to click the **Save** button top right hand corner of the panel.
- Use the middle panel to check the family relationships that have been setup.

When you go into the person profile the relationships are now listed under family relationships.

For further help and guidance click the Synergy Resources link

https://www.hackneyservicesforschools.co.uk/extranet/childrens-centres