

Synergy⁸

Family Children Centre Training Guide Level 1



Hackney Education

Synergy Children's Centre Level 1, 191020 Finalb



Synergy Overview

Topics

1. [Logging into Synergy](#)
2. [Setting Preferences](#)
3. [Conducting a Search](#)
4. [Creating a Family](#)
5. [Creating Relationships](#)
6. [Registering a Family](#)
7. [Creating Activities/Events and adding attendees](#)
[Appendix A – Project Types & Activities](#)

1. Logging into Synergy

Getting Started



Getting Started with Synergy

About Synergy

This module focuses on the Family Centre it demonstrates how to setup and maintain Family Centre information.

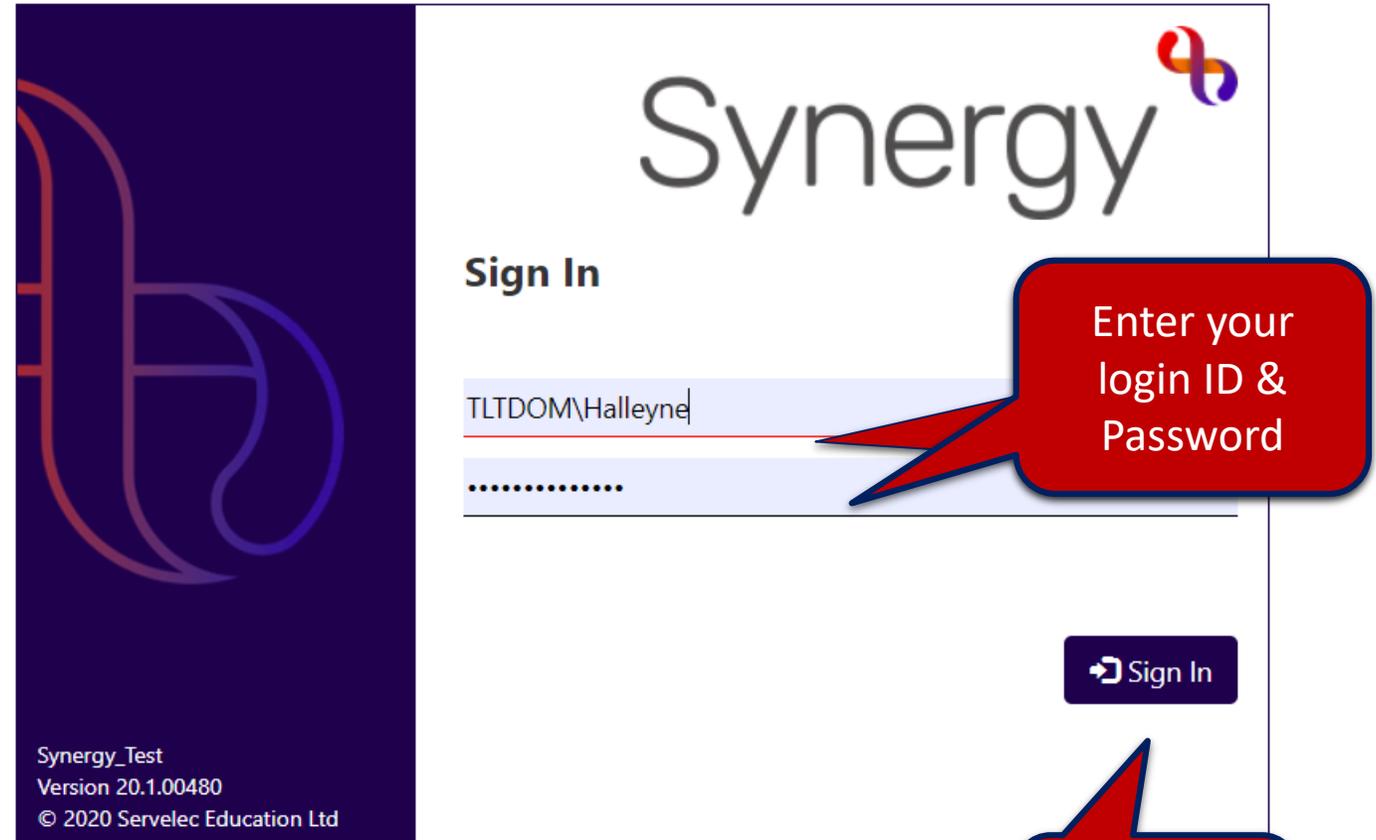
To get started with this module follow the steps outlined in this training guide.

To sign into the Synergy system:

- Click the relevant link to Synergy

<https://testportal.learningtrust.co.uk/Test/CaseManagement/Account/Login?ReturnUrl=%2FTest%2FCaseManagement%2F>

- From the Synergy Sign In screen type your login ID and password, proceed to click the **Sign In** button.

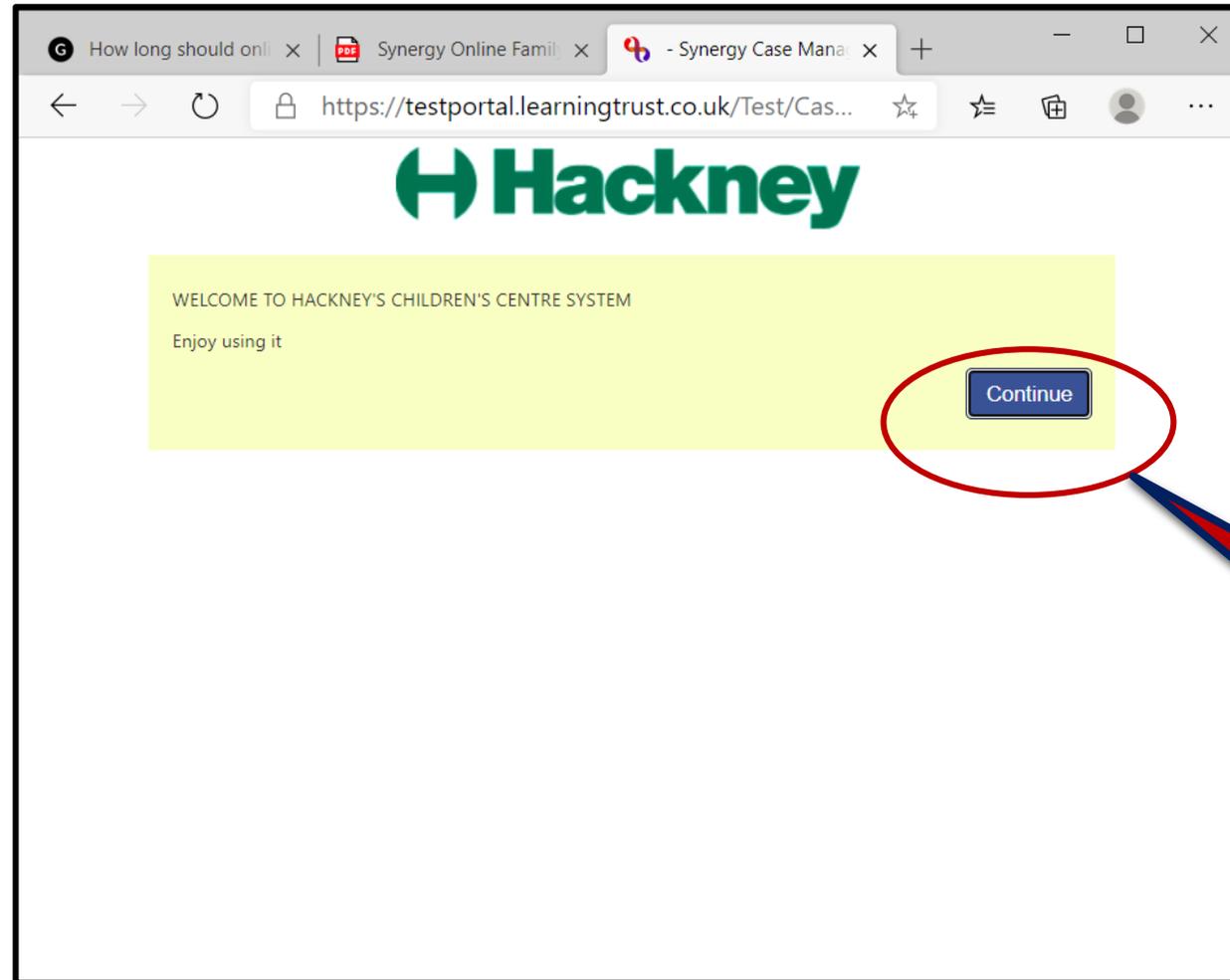


The screenshot shows the Synergy Sign In interface. On the left is a dark blue sidebar with a large stylized 'S' logo. The main content area has the Synergy logo at the top right, followed by the text 'Sign In'. Below this are two input fields: the first contains 'TLTDOM\Halleyne' and the second contains a series of dots. A red callout bubble points to these fields with the text 'Enter your login ID & Password'. Below the input fields is a dark blue button with a white arrow icon and the text 'Sign In'. A second red callout bubble points to this button with the text 'Click here to sign in'. At the bottom left of the main content area, there is small text: 'Synergy_Test', 'Version 20.1.00480', and '© 2020 Servelec Education Ltd'.

Synergy Sign in screen

Getting started continued

- The following splash screen appears, click the **Continue** button to proceed.



Getting started continued

- The Screen layout will vary, in this example it is using The Work Tray view, this appears beneath the menu bar. You can close this view by clicking the Work tray button:

The screenshot shows the Synergy Case Management interface. At the top is a blue navigation bar containing a 'Menu' icon, 'List', 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off' options. A search bar is on the right. Below the navigation bar is a 'Work Tray' view with a table of items and a search field. A sidebar on the left contains various menu items like 'My Tasks For Others', 'Authorisation', and 'Contact Records'. Three red callout boxes provide additional information: one on the left about the top navigation bar, one in the center about drop-down menus, and one on the right about recent history. A grey note box at the bottom right contains a document icon and a note about user preferences.

Top Navigation bar contains your username and the database version and instance of Synergy Case Management you are logged into

Drop-down menus are where main functions can be found. Content and actions vary depending on the permission you have been given and page being viewed

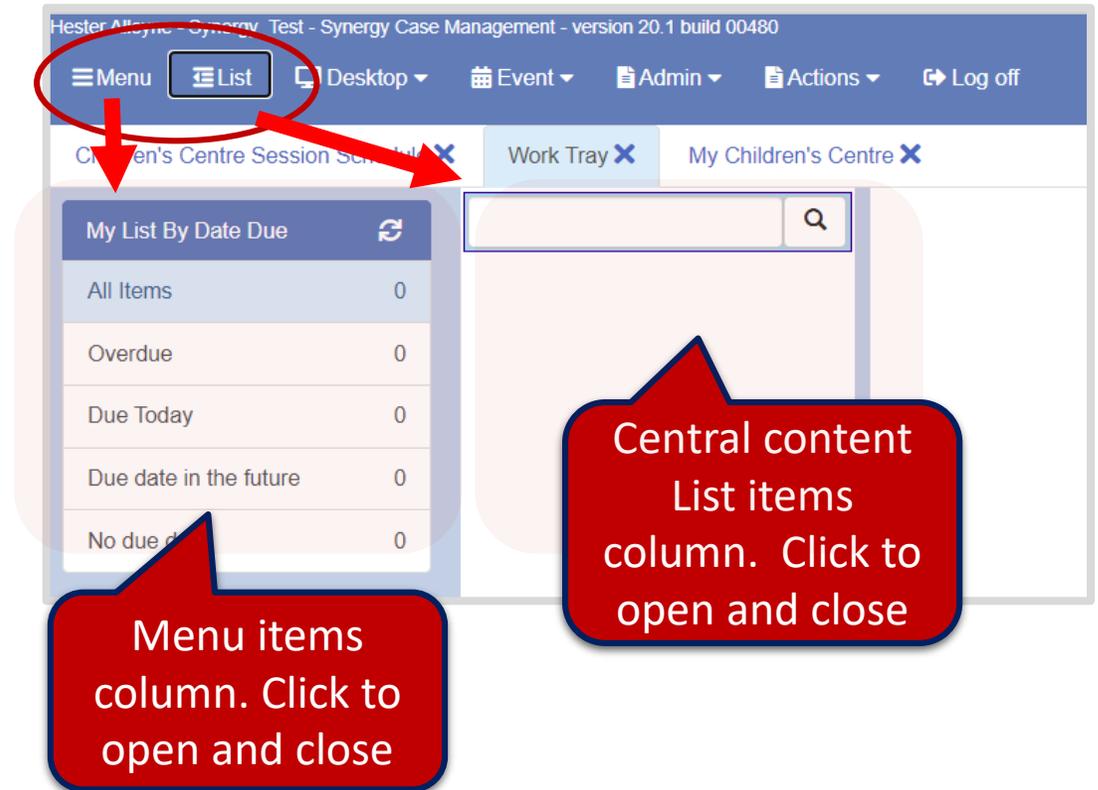
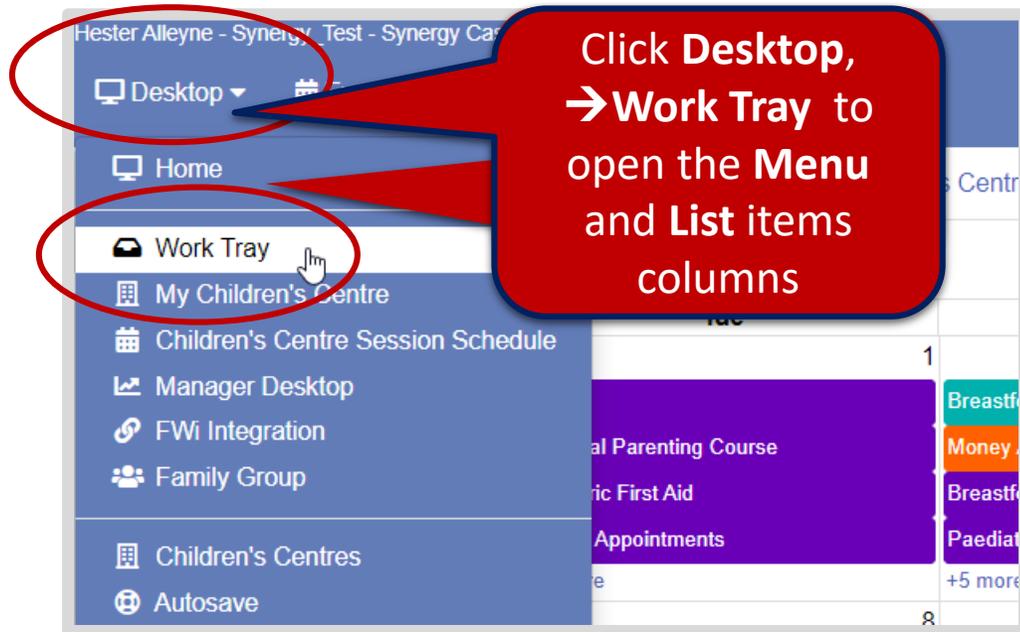
Additional menu items

Recent History

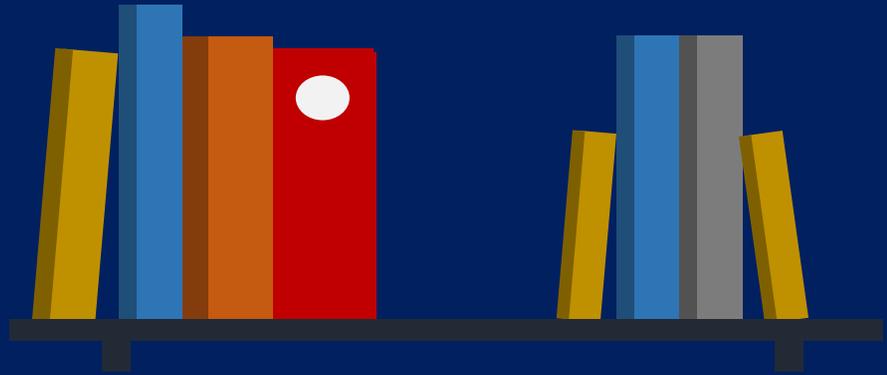
NOTE: The screen layout screen may differ depending on user Preferences

Getting started continued

- To update your screen to open the Menu and List item columns, select **Desktop**→**Work Tray**. From the Navigation bar click on **Menu** to close the Navigation bar. Click on the **List** menu option to open the list column, repeat to close.



NOTE: Open menu options show up beneath the Navigation bar as trays you can use the adjacent x to close open windows.



2. Setting Preferences

Setting up your default preferences

Setting Preferences

SETTING PREFERENCES USING THE CHILDREN CENTRE SCHEDULER AS THE HOME PAGE

To set user preferences for Children Centre view:

- To set user preferences click the **three ellipses** at the end of the Navigation Bar, click **User Preferences**, click **Edit**.

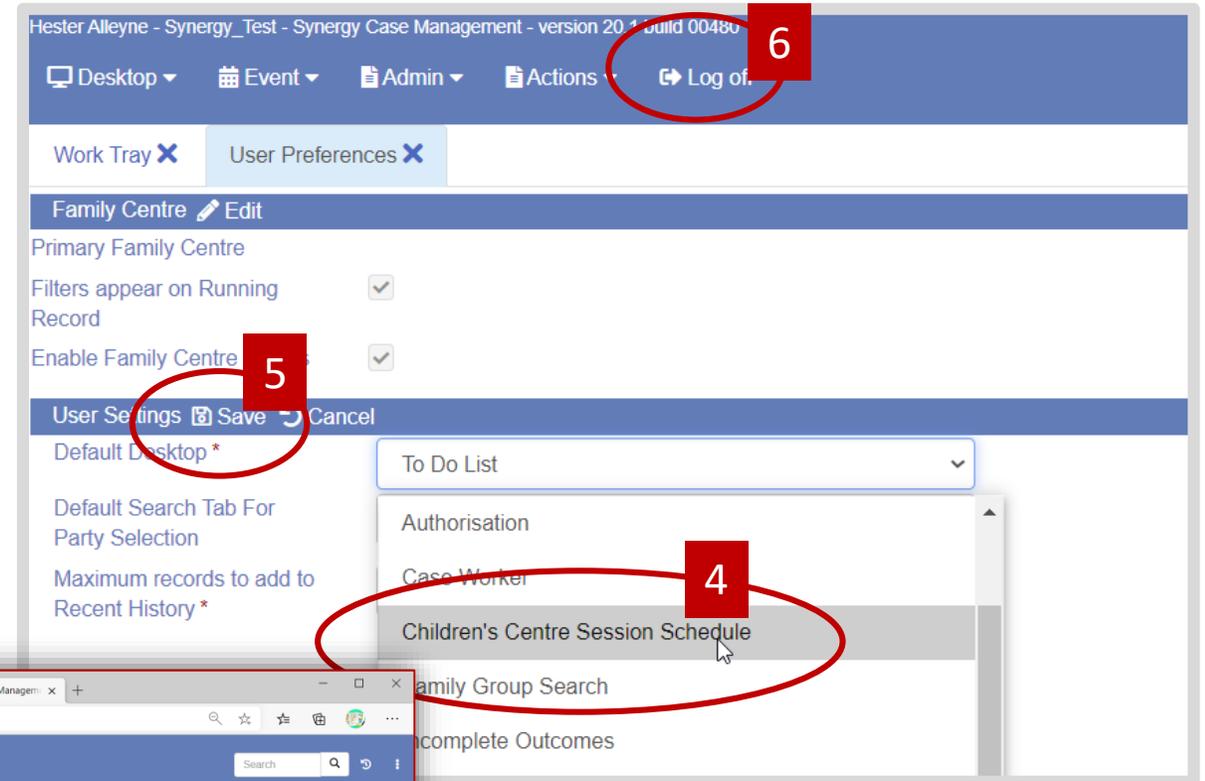
The screenshot displays the Synergy Case Management interface. The top navigation bar includes a search field and three ellipses (circled with a red '1'). A dropdown menu is open, showing options like 'Person Search', 'Advanced Person Search', 'Add Event', 'Switch Profile', 'Optimise for search', and 'User Preferences' (circled with a red '2'). The 'User Preferences' option is selected, opening a settings panel. The 'User Settings' section is highlighted with a red '3' and a red circle. The settings include:

Setting	Value
Primary Family Centre	
Filters appear on Running Record	<input checked="" type="checkbox"/>
Enable Family Centre Events	<input checked="" type="checkbox"/>
User Settings	Edit
Default Desktop *	To Do List
Default Search Tab For Party Selection	My Cases
Maximum records to add to Recent History *	10

Setting Preferences - continued

SETTING PREFERENCES - continued

- Click the **Edit** button then click the drop down arrow alongside the **Default Desktop*** field
- From the drop down list select **Children's Centre Session Schedule**.
- From Default Search Tab for Party Selection select **People**.
- Click the **Save** button.
- Click **Log Off** then log back in to see the changes take effect.



Bookshen

12 Multicolor Rectangles - Down

Home - Synergy Case Management

https://testportal.learningtrust.co.uk/Test/CaseManagement/

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Children's Centre Session Schedule X

< Today >

September 2020

Day Agenda Week Month Filter

Mon	Tue	Wed	Thu	Fri	Sat	Sun
CV Writing Course Henry Programme Talking Walk In Creche +1 more	Creche Antenatal Parenting Course Paediatric First Aid CAB Appointments +1 more	Breastfeeding Drop In Money Advice Paediatric First Aid +5 more	Antenatal Parenting Course ESOL Course Creche +5 more	Antenatal Parenting Course Speech and Language Groups S Breastfeeding D Consultation +2 more	Antenatal Parenting Course Creche	
CV Writing Course Talking Walk In Creche Breastfeeding Drop In +5 more	Creche Antenatal Parenting Course Consultation +12 more	Breastfeeding Drop In Money Advice Paediatric First Aid +4 more	Antenatal Parenting Course Messy Play Creche Breastfeeding Drop In +3 more	Speech and Lan Messy Play Consultation Paediatric First A Stay and Play		
Music Session CV Writing Course Talking Walk In Breastfeeding Drop In +4 more	Creche Consultation +4 more	Breastfeeding Drop In Money Advice Speech and Language Groups S ESOL Course	Music Session Antenatal Parenting Course Messy Play Creche +2 more	Consultation Stay and Play		
Music Session CV Writing Course Talking Walk In Breastfeeding Drop In	Creche Consultation	Breastfeeding Drop In Money Advice Music Session Speech and Language Groups S	Music Session Antenatal Parenting Course Messy Play Creche	Stay and Play		

Default Children's Centre Session Schedule screen appears when next logged in

3. Conducting a Search



Working with Searches

The Search Screen – Carry out a Person Search

REMEMBER: Before adding family contact information you must conduct an advanced search to ensure the family is not already logged on the system avoiding duplicate entries.

To search, select the three dots at the end of the work tray, then select Person Search.

- From the left panel click **People** then complete as many fields as you can.

The screenshot shows the Synergy Case Management interface. At the top, there's a navigation bar with 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off'. Below that is a 'Work Tray' with 'Search' selected. On the left, a 'My Cases' sidebar lists 'People', 'Family Group', 'Organisations', and 'Professionals'. The 'People' option is circled in red. A red callout box points to it with the text: '2. Make sure People is selected'. In the top right, a search bar is followed by a three-dot menu icon, which is also circled in red. A red callout box points to it with the text: '1. Quick Search; click the 3 dots and select Person Search'. The dropdown menu is open, showing 'Person Search' as the first option. Below the search bar, there are input fields for 'Sys Ref', 'Middle Name', 'DOB', and 'Family Name'. A red callout box points to these fields with the text: '3. Complete as many fields to help find a specific contact'. At the bottom right, there is a blue 'Search' button, also circled in red.

STEP A – CARRY OUT A THOROUGH PERSON SEARCH. Use fields such as First name, Surname and DOB.



NOTE: Searches are not case sensitive

The Search Screen – Carry out a Person Search

When you conduct one or multiple searches, Search Trays appear beneath the Navigation bar.

The screenshot shows the Synergy Case Management interface. At the top, there is a navigation bar with a search box and a 'Log off' button. Below the navigation bar, there are two search trays: 'Work Tray' and 'Search'. A red dashed box highlights the 'Search' tray, and a red callout box with white text says: 'NOTE: When you conduct searches they appear in trays beneath the Navigation bar'. The main content area is divided into a left sidebar with a 'Search' section containing 'My Cases', 'People', 'Family Group', 'Organisations', and 'Professionals'. The right side contains a form with fields for 'First Name', 'Middle Name', 'DOB', 'Family Name', and 'Postcode'. At the bottom right, there are '+ Create' and 'Search' buttons. At the bottom, there is a table header with columns: 'Sys Ref', 'First Name', 'Family Name', 'DOB', 'Address', and 'Status Flags'.

Conducting an Advanced Search

Conduct a thorough search using multiple fields

IT IS IMPORTANT TO CONDUCT A THOROUGH SEARCH IN ORDER TO AVOID DUPLICATES. PLEASE FOLLOW THE SEARCH METHODS OUTLINED OVER THE NEXT SEVERAL PAGES.

When conducting searches it is important to use a variety of combinations i.e. *First Name, Family Name* and *DOB* is more reliable when carrying out a search. You can even add the *Post Code* field if known.

The screenshot shows a web application interface for Synergy Case Management. The top navigation bar includes 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off' menus, along with a search bar and a refresh button. Below the navigation, there are tabs for 'Children's Centre Session Schedule' and 'Search'. The main content area is titled 'Search' and features a sidebar with a menu containing 'My Cases', 'People', 'Family Group', 'Organisations', and 'Professionals'. The 'People' option is selected. The search form contains the following fields: 'Sys Ref' (empty), 'First Name' (filled with 'Trevor'), 'Middle Name' (empty), 'Family Name' (filled with 'Golden'), 'DOB' (filled with '04/05/2004'), and 'Postcode' (filled with 'E1 3AD'). A calendar icon is visible next to the DOB field. Below the form are '+ Create' and 'Search' buttons. A table below the form displays the search results:

	Sys Ref	First Name	Family Name	DOB	Address	Status Flags
+	712	Trevor	Golden	04/05/2004	Hackney Mall, Hackney Street, E1 3AD	

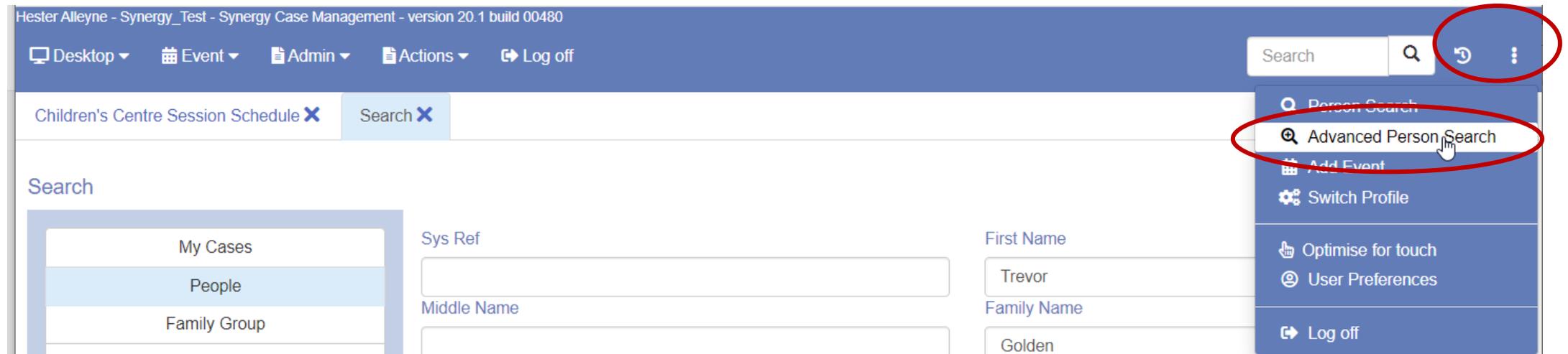
STEP B – USE THE SEARCH SCREEN AND COMPLETE MULTIPLE FIELDS

Conducting an Advanced Search - continued

Conducting an Advanced Search using the Menu

Another method of conducting an advanced search using the menu:

- Click the three ellipsis on the Navigation bar and click the option **Advanced Person Search**.



The screenshot displays the Synergy Case Management interface. At the top, the navigation bar includes a search box, a refresh icon, and a three-dot menu icon. The three-dot menu is open, showing options: Person Search, Advanced Person Search (highlighted with a red circle), Add Event, Switch Profile, Optimise for touch, User Preferences, and Log off. The main content area shows a search form with fields for Sys Ref, Middle Name, First Name (Trevor), and Family Name (Golden). A sidebar on the left contains a 'Search' section with a dropdown menu showing 'My Cases', 'People', and 'Family Group'.

STEP C – USE THE ADVANCED PERSON SEARCH

Conducting an Advanced Search - continued

Conducting an Advanced Search using the Menu continued

- Click in the **First Name** field using the wild card % (percent symbol) type in a partial name i.e. **%trev%** will search for names containing these characters.
- Click the **Search** magnify button to the right of the screen.

The result displays below the Search option.

The screenshot displays the Synergy Case Management interface. At the top, the title bar reads "Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480". Below this is a navigation bar with options: Desktop, Event, Admin, Actions, and Log off. A search bar is located in the top right corner. The main content area is titled "Children's Centre Session Schedule" and contains a "Search" tab. The "Search" tab is active, and the search criteria are displayed in a form. The "First Name" field is highlighted with a red oval and contains the text "%trev%". A red arrow points from this field to the search results. The search results are displayed in a blue box on the right side of the screen, showing one result: "(M) Golden, Trevor (712)". The result includes the following details: dob: 04/05/2004, address: Hackney Mall, Hackney Street, Hackney, and postcode: E1 3AD. The search criteria form includes fields for Title, First Name, Middle Name, Family Name, Date of Birth, Preferred First Name, Expected Date of Birth, Preferred Family Name, Known As, Gender, Sexual Orientation, Marital Status, Age in Months, and Age in Years. The search results are displayed in a blue box on the right side of the screen, showing one result: "(M) Golden, Trevor (712)". The result includes the following details: dob: 04/05/2004, address: Hackney Mall, Hackney Street, Hackney, and postcode: E1 3AD.

Important...



Do not proceed to the next section until you have carried out a thorough search using:

- a) a thorough Person Search using multiple fields**
- b) the Advanced Person Search**

Searches are covered on the previous pages, 12-16

3. Creating a Family



Setting up a family

How to Create a Family

When we are completely satisfied the family does not exist in the system we are now ready to create a family. To do this:

- From the menu bar select **Actions** → **Create Person** or,
- From a search screen click the **+Create** button lower right hand corner of the screen. Remember, if no results are presented when you carried out your search you can proceed to create a family. Each family member is given a system reference number.



Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Search

Work Tray × Search ×

Search

My Cases

People

Family Group

Organisations

Professionals

Sys Ref

First Name

Middle Name

Family Name

DOB

Postcode

Golden

+ Create Search

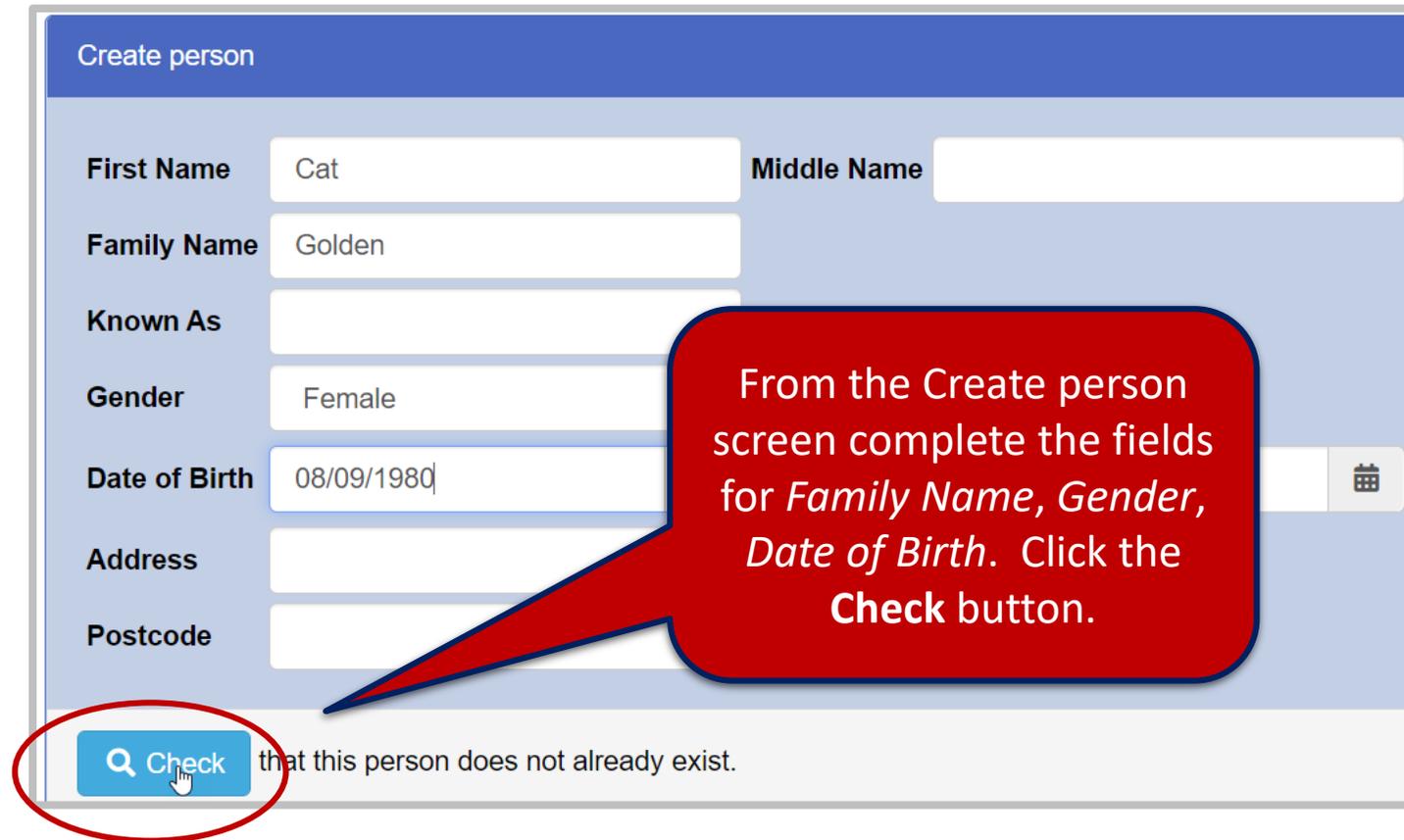
Sys Ref First Name Family Name DOB Address Status Flags



NOTE: Only click the **Create** button if no family exists.

Create your family continued – Add your family name

- From the Create Person window complete the *First Name*, *Gender* and *Date of Birth* fields then click the **Check** button. If you find a matching record it appears beneath the Search screen. (This could be a possible duplicate).
If your Search was unsuccessful you can create your first person or family member.



The screenshot shows a web form titled "Create person" with the following fields and values:

Field	Value
First Name	Cat
Middle Name	
Family Name	Golden
Known As	
Gender	Female
Date of Birth	08/09/1980
Address	
Postcode	

A red callout box with white text points to the form fields, stating: "From the Create person screen complete the fields for *Family Name*, *Gender*, *Date of Birth*. Click the **Check** button."

At the bottom left, a blue button with a magnifying glass icon and the text "Check" is circled in red. To its right, the text "that this person does not already exist." is visible.

Add your family name continued

- From the updated screen, click the tick box **Create another person**, then the **Create** button to add additional family members.

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Work Tray ✕ Search ✕ **Create Person ✕**

If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here.

Create person

First Name Cat
Middle Name
Family Name Golden
Known As
Gender Female
Date of Birth 08/09/1980
Address
Postcode

Create another person

Search again The search has returned 0 people

The screen is updated to reflect the following input. To create more members for the family select the option **Create another person** followed by the **Create** button on the lower right of this screen.



NOTE: De-select the **Create another Person** box if you do not need to create further family members.

Add your family name continued

- The new member is created, a list side panel opens with their details.

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 20.1 build 00480". The navigation bar includes "Desktop", "Event", "Admin", "Actions", and "Log off". A search bar is present in the top right. The main content area is titled "Create Person" and features a yellow banner with the text: "If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here." followed by a search input field and a "Search" button. Below this is the "Create person" form with fields for: First Name, Middle Name, Family Name (pre-filled with "Golden"), Known As, Gender (set to "Not Specified"), Date of Birth, and Expected Date of Birth. There are also fields for address and postcode. At the bottom of the form is a "Check" button and a "cancel" button. On the left side, a "List items" panel is open, showing a group named "Golden" with one member: "(F) Golden, Cat (710)" with a birth date of "08/09/1980". A red dashed box highlights the list item and the form fields. A red callout bubble with white text points to the list item, stating: "The screen now updates and the List items panel on the left opens with the new member detail."

Add your family name continued

- Continue adding family members by selecting the **Create another person** check box then click the **Create** button.

The screenshot shows the 'Create person' form in Synergy Case Management. The form includes fields for First Name (Jordan), Middle Name, Family Name (Golden), Known As, Gender (Male), Date of Birth (30/06/1979), Address, and Postcode. A search bar is present at the top right. A yellow banner at the top of the form area contains the text: 'If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here.' Below the form, there is a checkbox labeled 'Create another person' which is checked. A blue 'Create' button is located at the bottom right of the form. Three red callout boxes provide instructions: one points to the 'Create another person' checkbox, another points to the 'Create' button, and a third points to the form area.

Continue adding additional family members

Select to continue adding additional family members if no more members need to be added.

Click the Create button

Add your family name continued

- Be sure to click the **Check** button to see if a family member exists.
- To continue adding family members follow the process outlined on page 23.

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Search 🔍

Work Tray ✕ Search ✕ Create Person ✕

If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here. 🔍 Search

Group by Surname ▾

Golden 1

(M) Golden, Jordan (711)
dob: 30/06/1979
address:
postcode:
address from:

Create person

First Name Middle Name

Family Name Golden

Expected Date

that this person does not already exist.

Jordan Golden has now been created, the following list panel appears.

Click the **Check** button to see if the person exists.

Add your family name continued

- Clicking the **Check** button result with the following family members shown below in the lower part of the screen.
- If they belong to the same family a *relationship* must be created. This is outlined on the following pages.

Desktop Event Admin Actions Log off Search

Work Tray Search Create Person

If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here. Search

Group by Surname
Golden 1

(M) Golden, Jordan (711)
dob: 30/06/1979
address:
postcode:
address from:

Create person

First Name
Middle Name
Family Name Golden
Known As
Gender Not Specified
Date of Birth
Address
Postcode

Create another person

Create or cancel

Search again The search has returned 2 people

In family list
(M) Golden, Jordan (711) dob: 30/06/1979

Not in family list (Select 'add' to bring that person in to the list)
add (F) Golden, Cat (710) dob: 08/09/1980

4. Creating Relationships



Creating relationships

Creating a Relationship

When you add members of a family you must establish and create links. To do this:

- Select from the menu **Action** → **Create Person** then type the a family name in the **Family Name** field, click **Check**.
- Select each name listed in the lower panel of the screen by clicking the adjacent **+add** button, then click the **Cancel** button to close the Create person pane.
- Click a name from the left panel *as shown in the screen to the right.* →
- A notice appears when no relationships exist, click the **edit** button to begin creating relationships.

The screenshot shows the 'Create Person' pane in the Synergy Case Management software. The pane is titled 'Create Person' and has a search bar and a '+ Add' button. Below the search bar, there is a list of people with their names and dates of birth. The first person is '(F) Golden, Cat (710)' with a date of birth of 08/09/1980. The second person is '(M) Golden, Jordan (711)' with a date of birth of 30/06/1979. The third person is '(F) Golden, Simone' with a date of birth of 01/01/2007. The pane also has a 'Cancel' button and an 'edit' button. A notice at the bottom of the pane reads: 'No family relationships currently exist for this person. To add some, click edit, then select the relevant people in each section.' The 'edit' button is circled in red. A red dashed box highlights the list of people and the notice. Three red callout boxes provide instructions: 'A. Click to select a name from the list' points to the list, 'B. A notice No family relationships currently exist for this person appears. To add a relationship click the edit button top right of your screen' points to the notice, and 'C. Click to create a relationship' points to the 'edit' button.

A. Click to select a name from the list

B. A notice No family relationships currently exist for this person appears. To add a relationship click the edit button top right of your screen

C. Click to create a relationship

Creating a Relationship continued

- The screen updates to display several relationship panel; *Parents, Siblings, Current Partner, Children and Extended Relationships.*

The screenshot shows the Synergy Case Management interface. The top navigation bar includes 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off'. A search bar is on the right. The main content area is divided into a left sidebar and a central panel. The sidebar shows a list of people under the 'Golden' group, with details for (F) Golden, Cat (710), (M) Golden, Jordan (711), (F) Golden, Simone (713), and (M) Golden, Trevor (712). The central panel shows details for (F) Golden, Cat (710) and a message: 'No family relationships currently exist for this person. To add some, click add against the relevant section.' Below this message are five relationship panels: 'Parents', 'Siblings', 'Current Partner', 'Children', and 'Extended Relationships', each with an 'add' button. A red dashed box highlights these panels. A red speech bubble points to the panels with the text: 'The screen updates to display panels for Parents, Siblings, Current Partner, Children and Extended Relationships'.

Creating a Relationship continued

- Select in this example **Current Partner** panel, then click the adjacent **Add** button to the right.

The screenshot shows the Synergy Case Management interface. The top navigation bar includes 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off'. A search bar is located on the right. The main content area is titled 'Create Person' and shows a list of people with the surname 'Golden'. The selected person is (F) Golden, Cat (710), with a date of birth of 08/09/1980. Below the person's details, there is a section for 'Family Relationships' with the following panels:

- Parents: No one has been selected. + add
- Siblings: No one has been selected. + add
- Current Partner: No one has been selected. + add
- Children: No one has been selected. + add
- Extended Relationships: No one has been selected. + add

A red callout box with a blue border and a red arrow points to the 'Current Partner' panel and its 'add' button. The text inside the callout box reads: 'Select the Panel Current Partner then click the Add button alongside'. The 'Current Partner' panel and its 'add' button are also circled in red.

Creating a Relationship continued

- The screen updates and displays the **Add new relationship** panel.

The screenshot shows a software interface with a top navigation bar containing 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off'. A search bar is on the right. Below the navigation bar, there are tabs for 'Work Tray' and 'Create Person'. The main area is divided into a left sidebar and a right main panel. The sidebar shows a list of people under the group 'Golden', including Golden, Cat (710), Golden, Jordan (711), Golden, Simone (713), and Golden, Trevor (712). The main panel shows the details for Golden, Cat (710) and a yellow banner stating '4 people have no relationships set up'. A red callout bubble points to the 'Add new relationship' button, which is highlighted with a red circle. Below this button, there are dropdown menus for 'Add *' and 'as Partner', and a checkbox for 'Allow any party to be selected'. A 'cancel' button is at the bottom right.

Creating a Relationship continued

- Click the drop down arrow alongside the **Add*** field to choose the relevant party for a relationship.

Click the drop down arrow alongside the **Add*** field and choose the relevant name. In this example *Jordan* (husband) is selected.

Click the **Add** button

The screenshot shows the 'Create Person' interface with a list of people under the 'Golden' group. The 'Add new relationship' form is open, showing a dropdown menu for the 'Add *' field. The selected option is 'Golden, Jordan dob:30/06/1979'. The 'as' field is set to 'Partner' and the relationship is for 'Golden, Cat (710)'. The 'Add' button is highlighted with a red circle.

Creating a Relationship continued

- The screen is updated with the current partner added. Continue to add siblings or any other types of relationships by clicking the **+add** button in the **Children** panel.

The screenshot shows a software interface for creating a person's profile. The interface is divided into several sections:

- Left Panel:** A search bar and a list of people. The first person is (F) Golden, Cat (710) with a date of birth of 08/09/1980. The second person is (M) Golden, Jordan (711) with a date of birth of 30/06/1979.
- Top Bar:** Navigation options: + Add, Address, Contact De.
- Main Content Area:**
 - A message: "2 people have no relationships set up".
 - A warning: "The following changes have not yet been saved. (You can undo the most recent change.)" with a list item: "add Partner (M) Golden, Jordan (711) dob: 30/06/1979".
 - Parents:** No one has been selected.
 - Siblings:** No one has been selected. + add button.
 - Current Partner (1):** (M) Golden, Jordan (711) dob: 30/06/1979. Buttons: Change to ex-partner, remove.
 - Children:** No one has been selected. + add button.
 - Extended Relationships:** No one has been selected. + add button.

Three red callout boxes provide instructions:

- A. Select the Children panel** (points to the Children panel header).
- B. The screen is now updated showing the relationship link in the Current Partner panel** (points to the "add Partner" notification).
- C. To add any siblings locate the Children panel and click +add** (points to the "+ add" button in the Children panel).

Creating a Relationship continued

- To add children from the Children panel click the **+add** button. Click the drop down arrow alongside the **Add*** field.
- Click the **Add** button located in the far right hand corner of the screen.

The screenshot shows the Synergy Case Management interface. The main content area displays the 'Add new relationship' form for the person '(F) Golden, Cat (710)'. The form includes a dropdown menu for 'Add *' with the selected value 'Golden, Simone dob:01/01/2007', and another dropdown for 'as' with the value 'Child'. Below these, there is a section for 'Who are the child's parents?' with two options: 'Golden, Cat and Golden, Jordan (current partner)' (checked) and 'Just add Golden, Cat' (unchecked). At the bottom right, there is an 'Add' button and a 'cancel' button. A red callout bubble points to the 'Add*' dropdown menu, and another red callout bubble points to the 'Add' button.

To add children; from the **Add*** drop down list field locate the child to add

Click the **Add** button

Creating a Relationship continued

- When the children have been added click the **Save relationship changes** from the menu bar. This updates all relationships for the family.

The screenshot displays a user interface for managing family relationships. At the top, a blue navigation bar contains several menu items: 'Add', 'Address', 'Contact Details', 'Family Group', and 'Save relationship changes'. The 'Save relationship changes' button is highlighted with a red circle. Below the navigation bar, the profile of '(M) Golden, Trevor (712)' is shown, including his date of birth (04/05/2004) and fields for address, telephone number, and current groups. A yellow warning box is present, indicating that changes have not been saved and listing the following additions: 'add Parent (F) Golden, Cat (710) dob: 08/09/1980', 'add Parent (M) Golden, Jordan (711) dob: 30/06/1979', and 'add Child (F) Golden, Simone (713) dob: 01/01/2007'. Below the warning box, the interface shows sections for 'Parents (2)', 'Siblings', 'Current Partner', 'Children (1)', and 'Extended Relationships'. The 'Parents' section lists Cat Golden (710) and Jordan Golden (711). The 'Children' section lists Simone Golden (713). Each entry has a 'remove' button, and each section has an 'add' button. A red callout box with a white background and a red border points to the 'Save relationship changes' button, containing the text: 'In this example the current partner and a child has been added click the Save Relationship changes button.'

Creating a Relationship continued

- Click the **Save** button to save all changes. Once saved the relationship page is updated.

The screenshot shows the Synergy Case Management interface. The main window displays the profile for (F) Golden, Cat (710), including personal details and relationship sections. A red callout bubble labeled 'A. Click the Save button to save all changes' points to a 'save' button in the top right corner. Another red callout bubble labeled 'B. Once saved The relationship page updates accordingly' points to the 'Current Partner' section, which now lists (M) Golden, Jordan (711) as the partner.

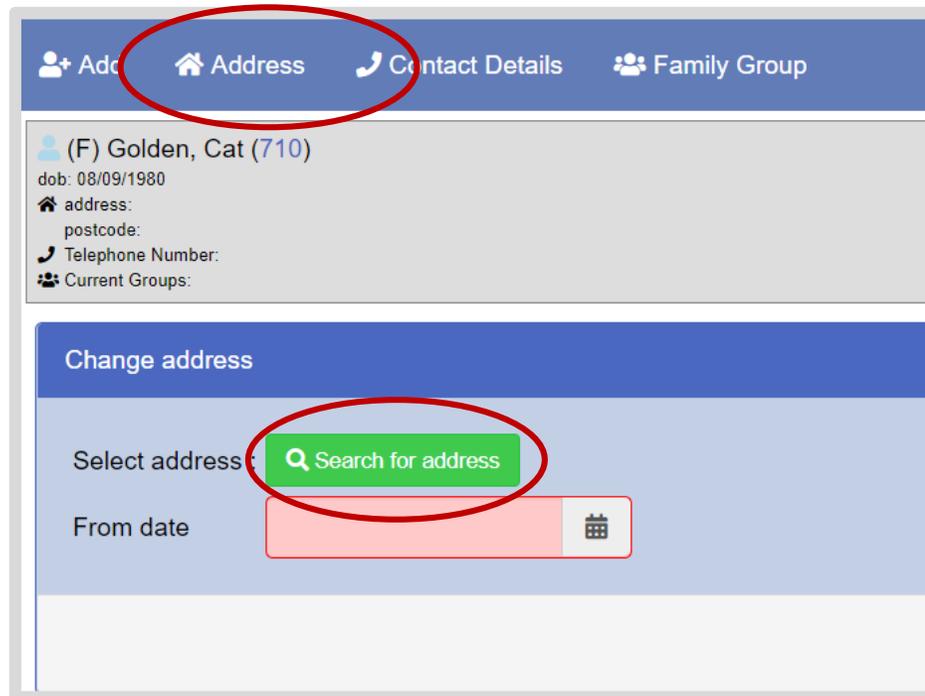
A. Click the Save button to save all changes

B. Once saved The relationship page updates accordingly

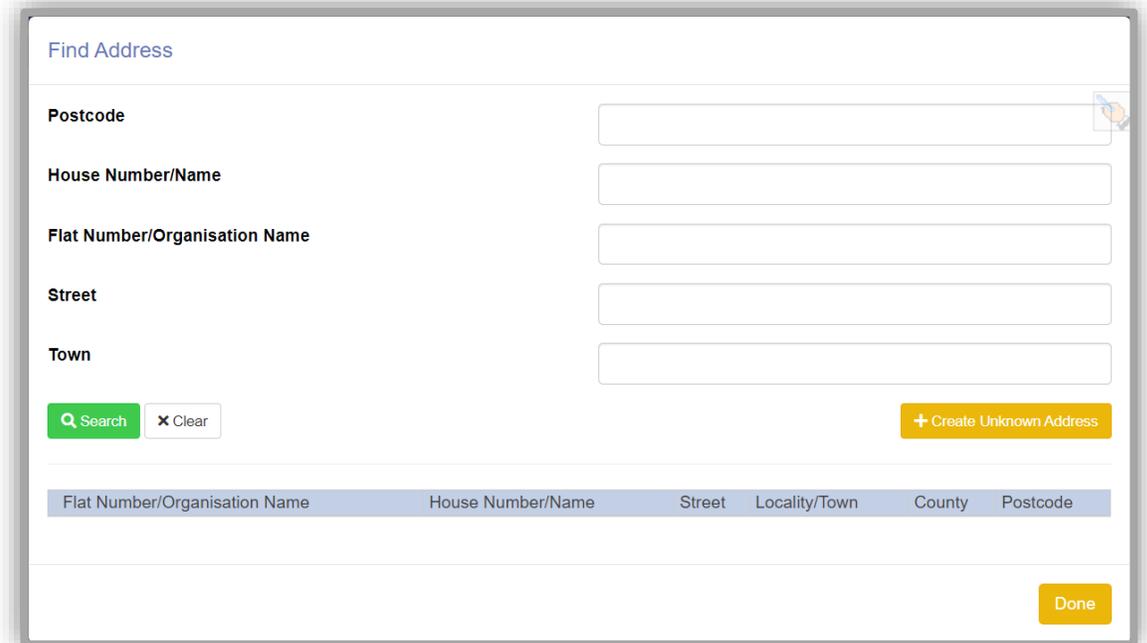
Creating a Relationship continued. Adding Address, Contact Details & Family Group

TO add an Address

- Follow the same steps as outlined on page 27.
- Click the **Address** button, then click the **Search for attendees** button, Find Address window opens.



The screenshot shows a user profile page for '(F) Golden, Cat (710)'. The navigation bar at the top has four tabs: 'Add', 'Address', 'Contact Details', and 'Family Group'. The 'Address' tab is selected and circled in red. Below the navigation bar, the user's details are listed: 'dob: 08/09/1980', 'address:', 'postcode:', 'Telephone Number:', and 'Current Groups:'. Below this is a 'Change address' section with a blue header. In this section, there is a 'Select address:' label and a green button with a magnifying glass icon and the text 'Search for address', which is also circled in red. Below the button is a 'From date' label and a date picker widget.



The screenshot shows a 'Find Address' window. It has a title bar with the text 'Find Address'. Below the title bar are five input fields: 'Postcode', 'House Number/Name', 'Flat Number/Organisation Name', 'Street', and 'Town'. Below the input fields are two buttons: a green button with a magnifying glass icon and the text 'Search', and a white button with a close icon and the text 'Clear'. To the right of these buttons is a yellow button with a plus icon and the text '+ Create Unknown Address'. Below the input fields is a table with the following columns: 'Flat Number/Organisation Name', 'House Number/Name', 'Street', 'Locality/Town', 'County', and 'Postcode'. At the bottom right of the window is a yellow button with the text 'Done'.

Creating a Relationship continued. Adding Address, Contact Details & Family Group

TO add an Address

- From the Find Address window click in the **Postcode** field and enter a postcode.
- Click the **Search** button.

If an address exists it will appear in the lower part of the window.

- Click the address to select then click **Done**.

Find Address

Postcode: e1 3ad

House Number/Name:

Flat Number/Organisation Name:

Street:

Town:

Search Clear + Create Unknown Address

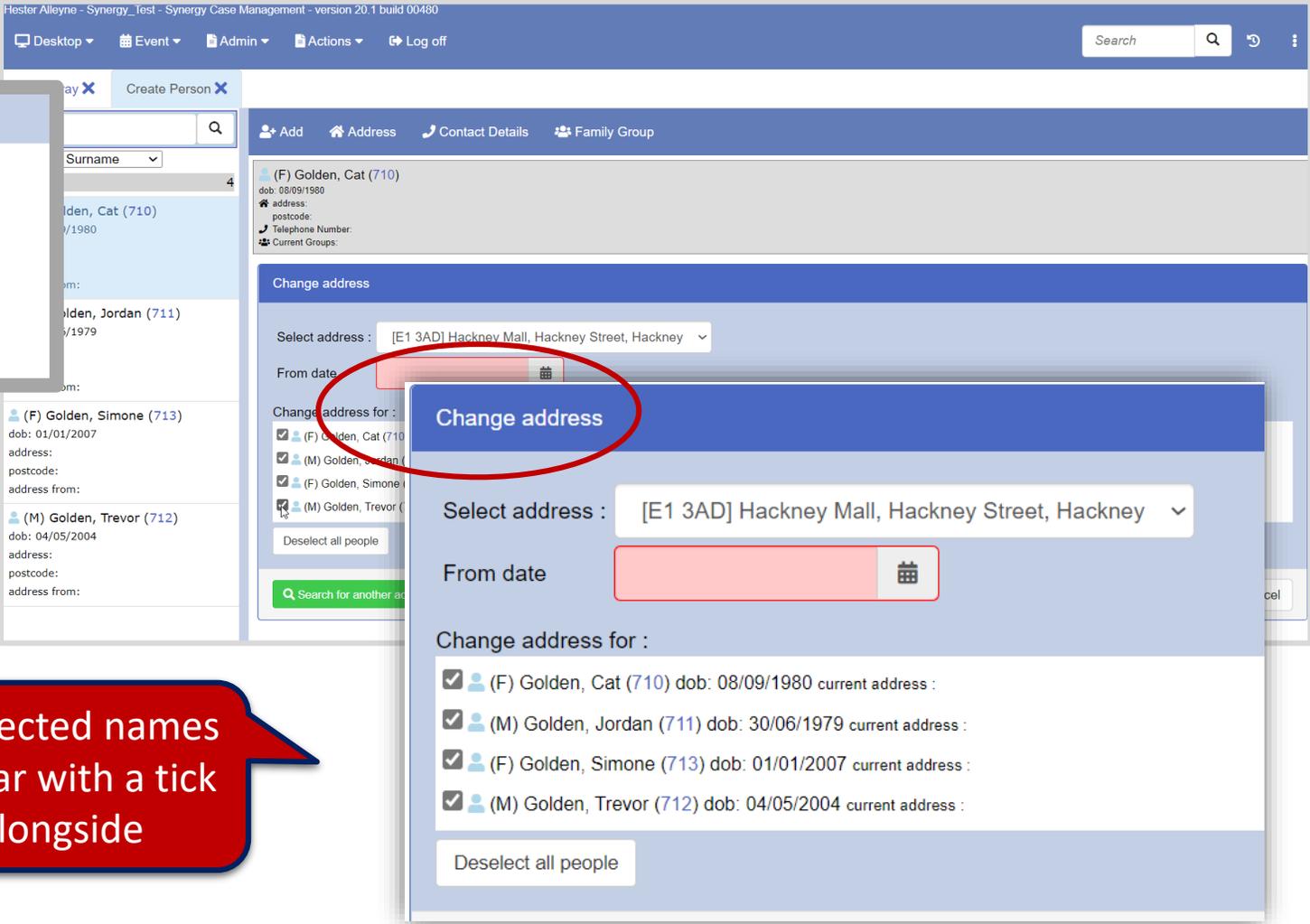
Flat Number/Organisation Name	House Number/Name	Street	Locality/Town	County	Postcode
	Hackney Mall	Hackney Street	Hackney		E1 3AD

Hackney Mall, Hackney Street, Hackney, E1 3AD, Hackney

Done

Creating a Relationship continued. Adding Address, Contact Details & Family Group

The screen updates. In the Change address for area click the tick boxes alongside each name to select all family members.



A. Click each family member check box to select all names

B. Selected names appear with a tick alongside

Creating a Relationship continued. Adding Address, Contact Details & Family Group

- Use the From date field to add the date the form was completed. Then click the **Change** button.

The screenshot displays a 'Change address' dialog box overlaid on a user profile page. The dialog box has a blue header and contains the following elements:

- Select address :** A dropdown menu showing '[E1 3AD] Hackney Mall, Hackney'.
- From date :** A date input field with a calendar icon to its right. A red circle highlights this field and icon.
- Change address for :** A list of four people with checkboxes and their details:
 - (F) Golden, Cat (710) dob: 08/09/1980 current address :
 - (M) Golden, Jordan (711) dob: 30/06/1979 current address :
 - (F) Golden, Simone (713) dob: 01/01/2007 current address :
 - (M) Golden, Trevor (712) dob: 04/05/2004 current address :
- Deselect all people** button.

A large red callout bubble points to the 'From date' field and icon, containing the text: "C. Click in the **From date** field to add the date the form was completed. You can double click this field to add the date or click on the date icon button to the right".

The background user profile page shows a search bar, navigation tabs for 'Add', 'Address', 'Details', and 'Family Group', and a list of people. A smaller 'Change address' dialog is also visible in the background, with a red circle around its 'From date' field and another red circle around its 'Change' button.

A second red callout bubble points to the 'Change' button in the background dialog, containing the text: "Click the **Change** button".

Creating a Relationship continued. Adding Address, Contact Details & Family Group

The family are now connected to an address:

The screenshot shows the Synergy Case Management interface. The main window displays a list of people grouped by Surname. The 'Golden' group is selected, and a 'Change address' dialog box is open. The dialog box shows the selected address as '[E1 3AD] Hackney Mall, Hackney Street, Hackney' and the 'From date' as '16/09/2020'. Below this, there is a list of people to be updated with the new address, all of whom are checked. The list includes:

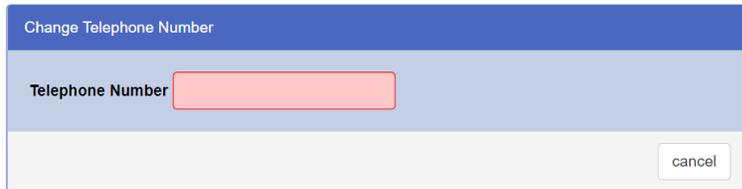
- (F) Golden, Cat (710) dob: 08/09/1980 current address :
- (M) Golden, Jordan (711) dob: 30/06/1979 current address :
- (F) Golden, Simone (713) dob: 01/01/2007 current address :
- (M) Golden, Trevor (712) dob: 04/05/2004 current address :

At the bottom of the dialog box, there is a 'Deselect all people' button, a green 'Search for another address' button, and 'Change' or 'cancel' buttons.

Creating a Relationship continued. Adding Address, **Contact** Details & Family Group

Add Contact details

- Click the **Contact Details** button. The Change Telephone Number screen appears.
- Click **+Create New Number** button and type a telephone number Landline in the New Telephone Number field (11 digits).

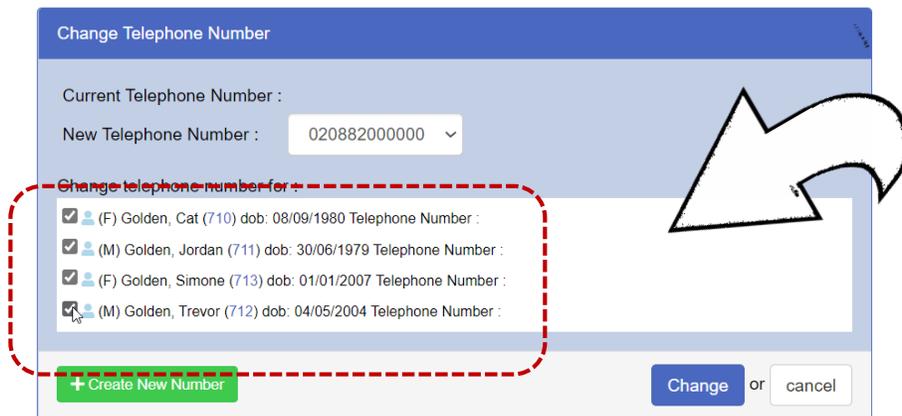


Change Telephone Number

Telephone Number

cancel

- Click the button lower right **Create New Number**.
- Assign the landline number to the family by clicking the check boxes alongside each family member name.



Change Telephone Number

Current Telephone Number :

New Telephone Number : 020882000000

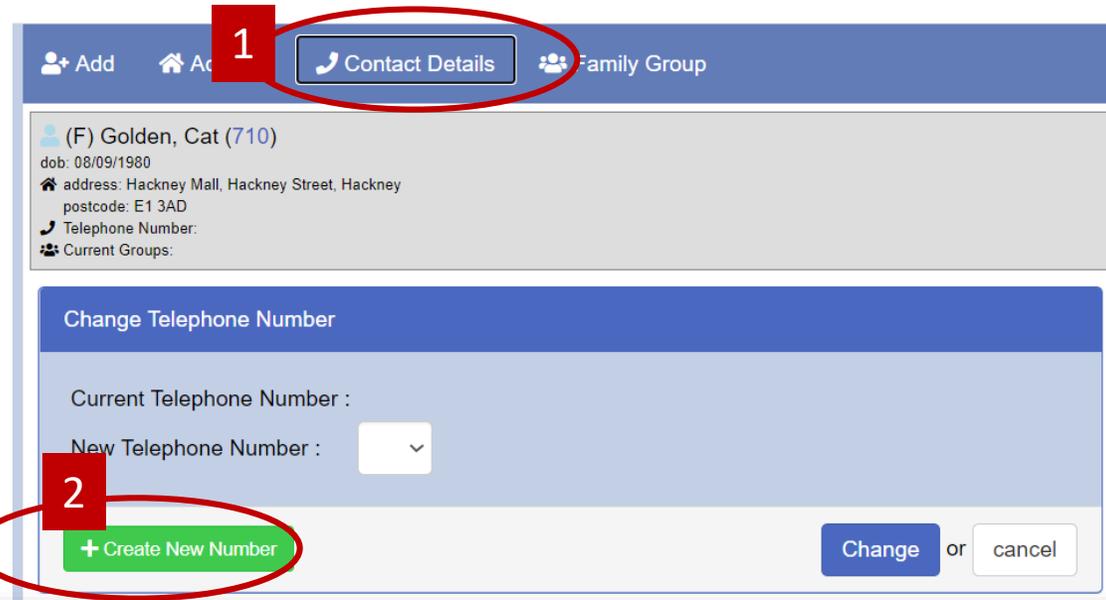
Change telephone number for :

- (F) Golden, Cat (710) dob: 08/09/1980 Telephone Number :
- (M) Golden, Jordan (711) dob: 30/06/1979 Telephone Number :
- (F) Golden, Simone (713) dob: 01/01/2007 Telephone Number :
- (M) Golden, Trevor (712) dob: 04/05/2004 Telephone Number :

+ Create New Number

Change or cancel

Selected family names



+ Add Home Ac **1** Contact Details Family Group

(F) Golden, Cat (710)
dob: 08/09/1980
address: Hackney Mall, Hackney Street, Hackney
postcode: E1 3AD
Telephone Number:
Current Groups:

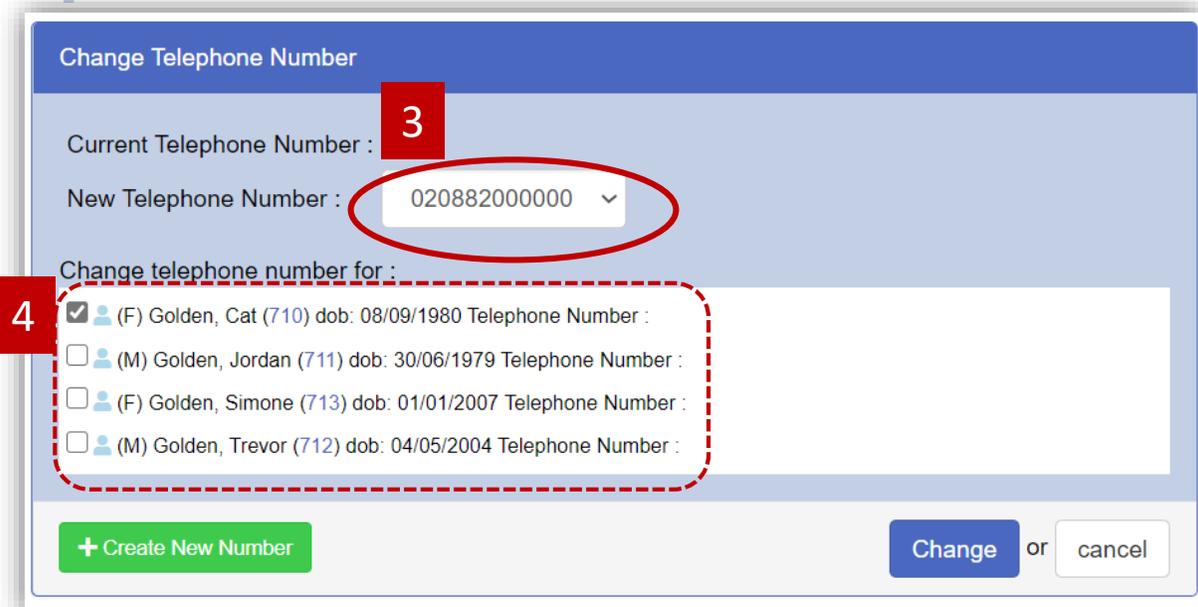
Change Telephone Number

Current Telephone Number :

New Telephone Number :

2 + Create New Number

Change or cancel



Change Telephone Number

Current Telephone Number :

3

New Telephone Number : 020882000000

Change telephone number for :

- (F) Golden, Cat (710) dob: 08/09/1980 Telephone Number :
- (M) Golden, Jordan (711) dob: 30/06/1979 Telephone Number :
- (F) Golden, Simone (713) dob: 01/01/2007 Telephone Number :
- (M) Golden, Trevor (712) dob: 04/05/2004 Telephone Number :

4

+ Create New Number

Change or cancel

Creating a Relationship continued. Adding Address, Contact Details & Family Group

Add Contact details

- Click the **Change** button, the following screen appears:

The screenshot shows a software interface for managing contact details. On the left, a list of Golden family members is displayed, including Cat (710), Jordan (711), Simone (713), and Trevor (712). On the right, a 'Change Telephone Number' dialog box is open, showing a list of selected contacts and a 'Change' button circled in red. A red box with the number '5' is next to the 'Change' button. A white arrow points from the 'Change' button in the main interface to the dialog box.

Change Telephone Number

Current Telephone Number :
New Telephone Number : 02088200000

Change telephone number for :

- (F) Golden, Cat (710) dob: 08/09/1980 Telephone Number :
- (M) Golden, Jordan (711) dob: 30/06/1979 Telephone Number :
- (F) Golden, Simone (713) dob: 01/01/2007 Telephone Number :
- (M) Golden, Trevor (712) dob: 04/05/2004 Telephone Number :

+ Create New Number

Change or cancel

Creating a Relationship continued. Adding Address, **Contact** Details & Family Group

Add Contact details Mobile Number

- Click **Contact Details** then select the **+Create New Number** button.

The screenshot shows a contact management interface with a blue header bar containing four tabs: 'Add', 'Address', 'Contact Details', and 'Family Group'. The 'Contact Details' tab is selected and circled in red. Below the header, the contact information for '(F) Golden, Cat (710)' is displayed, including their date of birth (08/09/1980), address (Hackney Mall, Hackney Street, Hackney, E1 3AD), and telephone number (02088200000). Below this is a section titled 'Change Telephone Number' with a blue header. It shows the 'Current Telephone Number' as 02088200000 and a 'New Telephone Number' dropdown menu currently set to 02088200000. A yellow box below the dropdown lists 'People with this telephone number' with four entries: (F) Golden, Cat (710) dob: 08/09/1980; (M) Golden, Jordan (711) dob: 30/06/1979; (F) Golden, Simone (713) dob: 01/01/2007; and (M) Golden, Trevor (712) dob: 04/05/2004. At the bottom of the form, there is a green '+ Create New Number' button circled in red and a 'cancel' button.

 **NOTE:** If your screen times out to get back to the screen shown, use the Actions → Create Person feature outlined on page 27.

Creating a Relationship continued. Adding Address, **Contact** Details & Family Group

Add Contact details, Mobile Number

- In the Telephone Number field type the mobile number. Click **Create New Number** button bottom right.
- From the Change telephone number for: panel be sure to assign the number to the relevant family member. In this example the mobile number belongs to *Jordan Golden*.
- Click the **Change** button.

(F) Golden, Cat (710)
dob: 08/09/1980
address: Hackney Mall, Hackney Street, Hackney
postcode: E1 3AD
Telephone Number: 02088200000
Current Groups:

Change Telephone Number

Telephone Number 07841234556

Create New Number or cancel

Click to select the person whose number the mobile belongs to – then click **Change**

Change Telephone Number

Current Telephone Number : 02088200000

New Telephone Number : 07841234556

Change telephone number for :

- (F) Golden, Cat (710) dob: 08/09/1980 Telephone Number : 02088200000
- (M) Golden, Jordan (711) dob: 30/06/1979 Telephone Number : 02088200000
- (F) Golden, Simone (713) dob: 01/01/2007 Telephone Number : 02088200000
- (M) Golden, Trevor (712) dob: 04/05/2004 Telephone Number : 02088200000

+ Create New Number

Change or cancel

Creating a Relationship continued. Adding Address, **Contact** Details & Family Group

Add Contact details, Mobile Number

The screen updates with the new mobile number. The number has been assigned to just one family member.

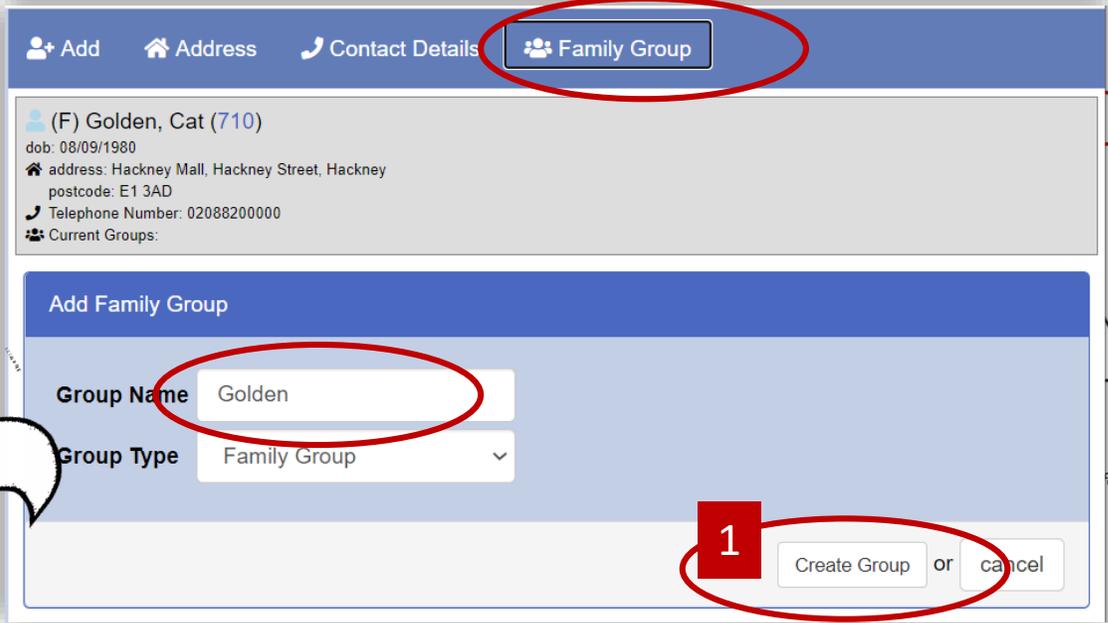
Continue to follow the steps outlined if you need to add additional mobile numbers to other members in the family.

The screenshot shows a mobile application interface for managing family contacts. At the top, there is a navigation bar with four tabs: 'Add', 'Address', 'Contact Details', and 'Family Group'. The 'Contact Details' tab is currently selected. Below the navigation bar, the contact details for '(F) Golden, Cat (710)' are displayed. These details include the date of birth (08/09/1980), address (Hackney Mall, Hackney Street, Hackney, postcode: E1 3AD), and telephone number (02088200000). The 'Current Groups' section is currently empty. Below the contact details, there are several sections for family relationships, each with an 'add' button: 'Parents', 'Siblings', 'Current Partner (1)', 'Children (2)', and 'Extended Relationships'. The 'Current Partner (1)' section shows a list of partners, including '(M) Golden, Jordan (711) dob: 30/06/1979', with options to 'Change to ex-partner' or 'remove'. The 'Children (2)' section shows a list of children, including '(M) Golden, Trevor (712) dob: 04/05/2004' and '(F) Golden, Simone (713) dob: 01/01/2007', each with a 'remove' button.

Creating a Relationship continued. Creating a Family Group

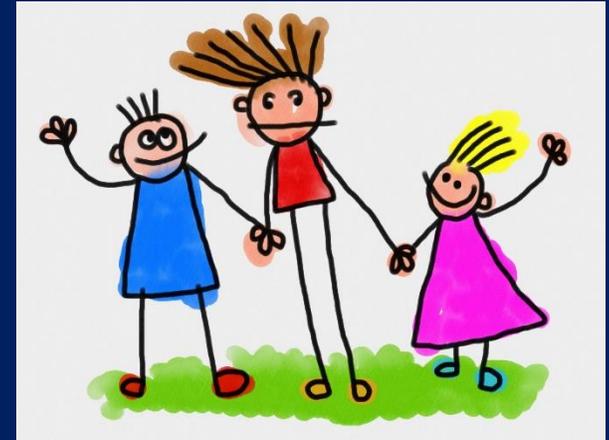
Add Family Group

- Click the **Family Group** button check the Group Name for the family group is entered.
- Click the **Create Group** button, the screen updates listing all names in the family group. In this example, the *Golden* family.
- Click the check boxes alongside each family name to select all members, then click **Add to group** button.



- The family are now added to a family group. To check click the **Family Group** button and click the drop own arrow alongside the **Add to Group** field.
- A list appears listed beneath a panel **People currently in the family group** with all the family members in the group.

5. Registering a Family



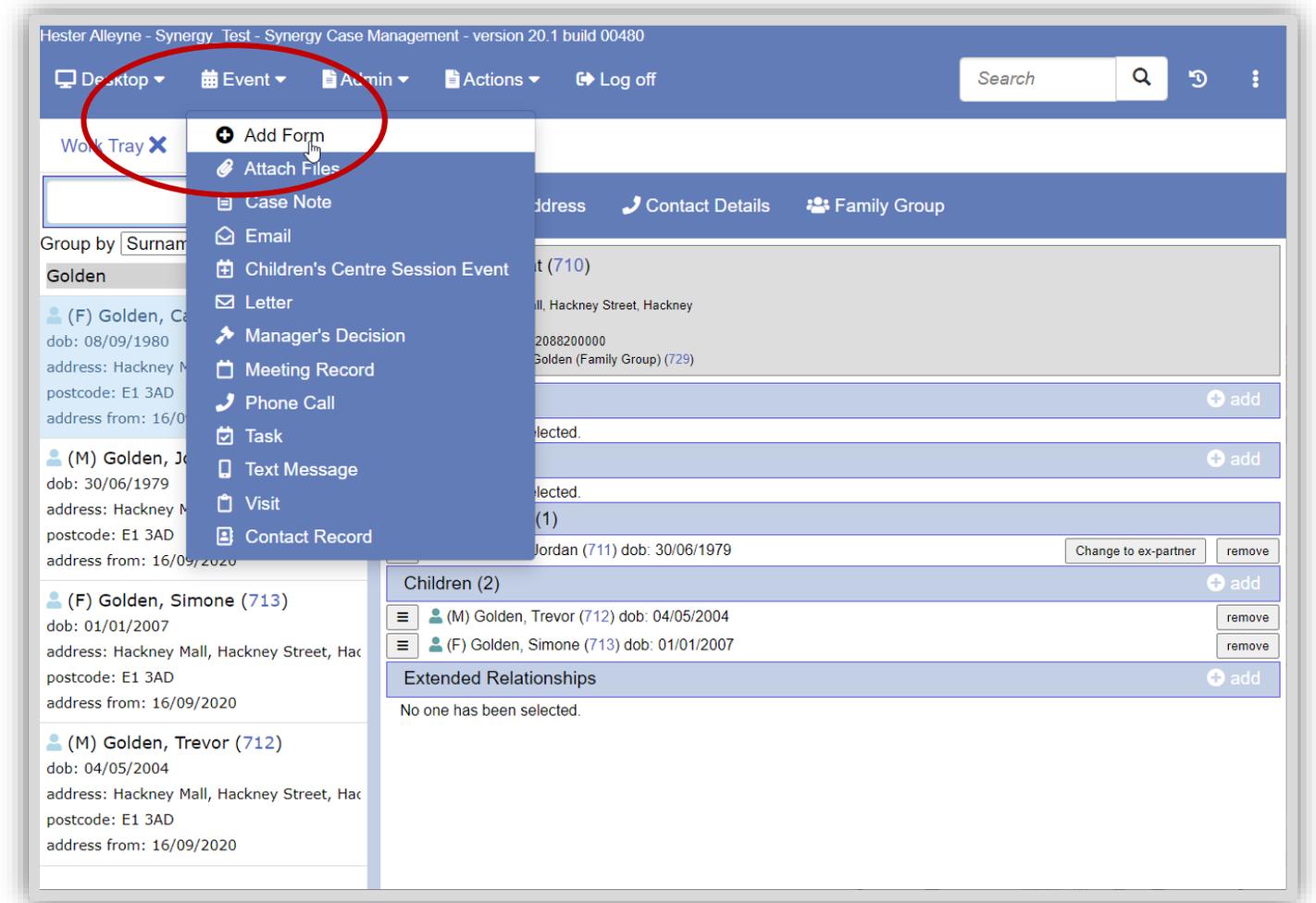
Add Children's Centre Registration Form

Registering a Family at a Children's Centre

Children's Centre Registration Form

To add a family onto the Learning Trust Registration follow the steps outlined.

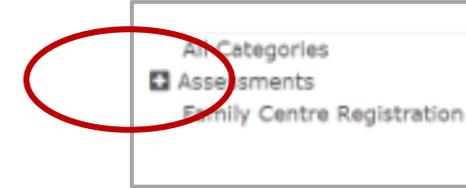
- Select **Desktop**→**Home**.
- From the menu bar click **Event**→**Add Form**.



Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

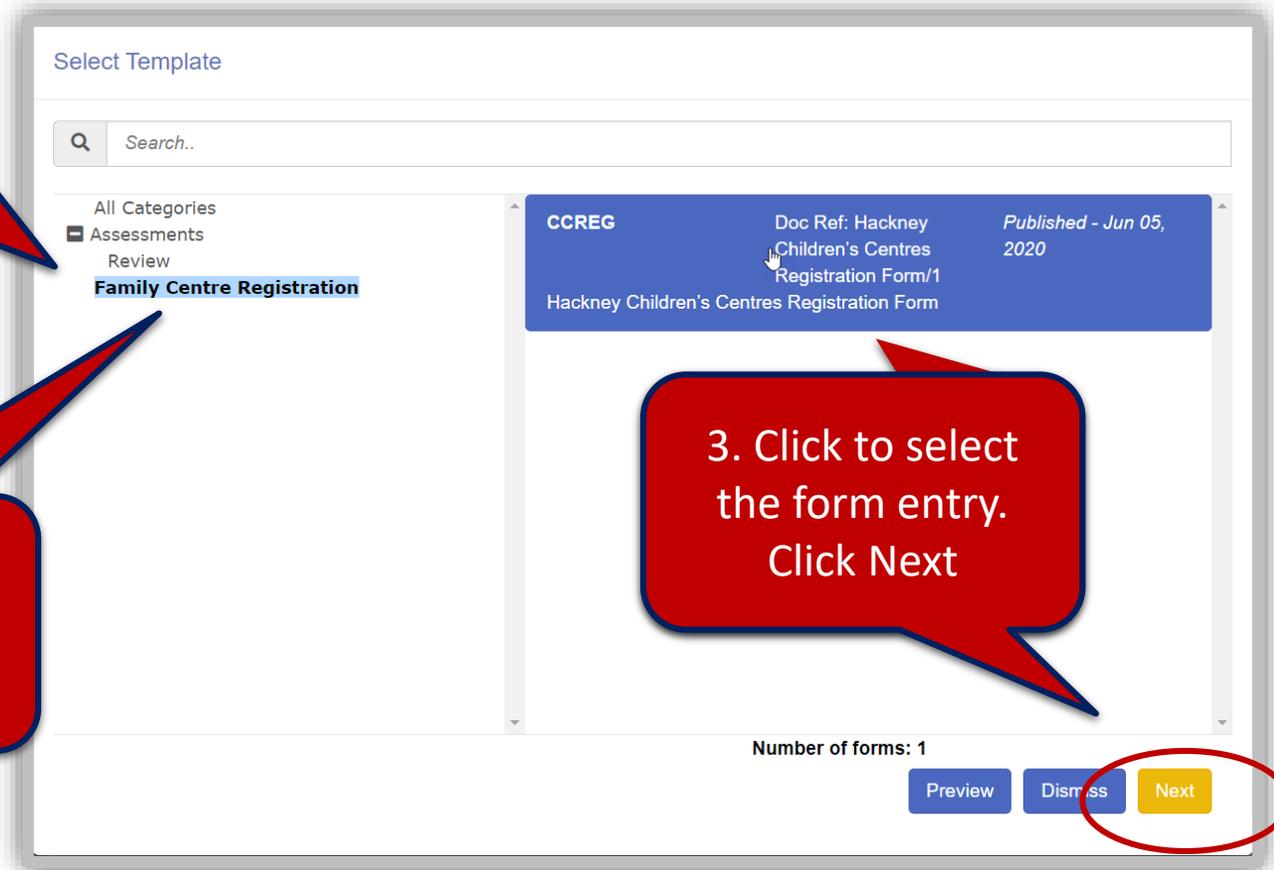
- From the Select Template dialogue box click the **plus symbol** alongside the **Assessments** option to expand the entry.
- Click **Family Centre Registration** and the adjacent entry form **CCREG** then the **Next** button.



1. Click the plus sign which now shows a minus to expand the entry

2. Click the option Family Centre Registration

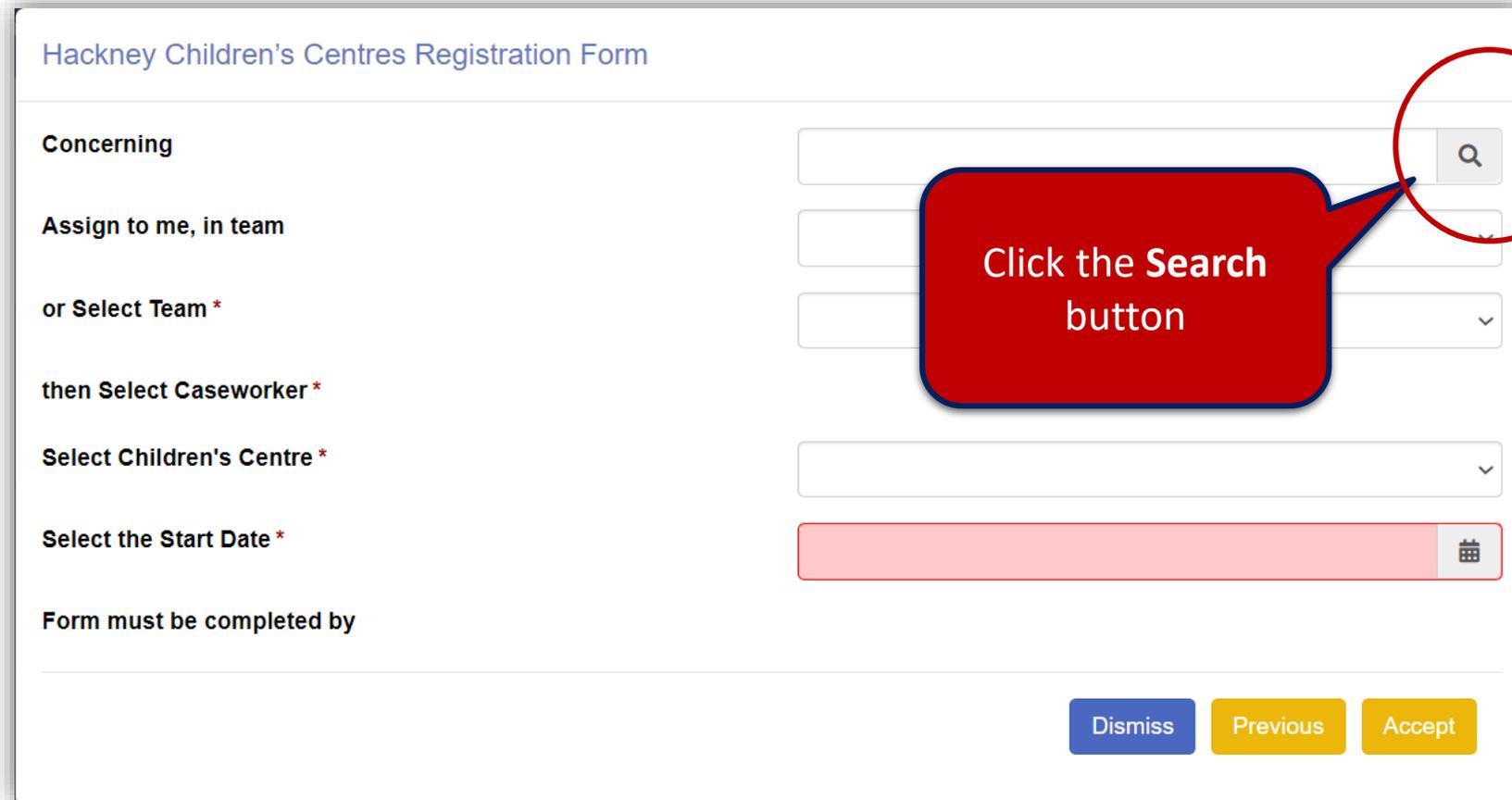
3. Click to select the form entry. Click Next



Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

- From the Hackney Children's Centre Registration Form window click the **Search** button to load the Select Parties window.



Hackney Children's Centres Registration Form

Concerning

Assign to me, in team

or Select Team *

then Select Caseworker *

Select Children's Centre *

Select the Start Date *

Form must be completed by

Dismiss Previous Accept

Click the Search button

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

- Your screen should resemble the following, if not already selected, click the **People** option from the list on the left.
- In the Family name field type the name of your family. In this example *Golden* is entered.
- Click the **Search** button.

Select Parties...

1

My Cases

People

Carers

Professionals

Organisations

Family Members

Family Group

Related Professionals

Related Caseworkers

Related Significant Others

Sys Ref

First Name

Middle Name

2

Family Name

Golden

DOB

Postcode

3

Search

Sys Ref	First Name	Family Name	DOB	Address	Status	Flags
---------	------------	-------------	-----	---------	--------	-------

Search using lists

Done

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

- A list of all the family members entered in the Surname field appears.

Select Parties...

My Cases

People

Carers

Professionals

Organisations

Family Members

Family Group

Related Professionals

Related Caseworkers

Related Significant Others

Sys Ref

First Name

Middle Name

Family Name

DOB

Postcode

Search

	Sys Ref	First Name	Family Name	DOB	Address	Status	Flags
+	710	Cat	Golden	08/09/1980	Hackney Mall, Hackney Street, E1 3AD		
+	711	Jordan	Golden	30/06/1979	Hackney Mall, Hackney Street, E1 3AD		
+	712	Trevor	Golden	04/05/2004	Hackney Mall, Hackney Street, E1 3AD		
+	713	Simone	Golden	01/01/2007	Hackney Mall, Hackney Street, E1 3AD		

Search using lists

Done

Family members list appears

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

- Click a name from either the First Name or Family Name field, do this to add each family member.
- Click the **Done** button bottom right to complete.

	Sys Ref	First Name	Family Name	DOB	Address	Status	Flags
+	710	Cat	Golden	08/09/1980	Hackney Mall, Hackney Street, E1 3AD		
+	711	Jordan	Golden	30/06/1979	Hackney Mall, Hackney Street, E1 3AD		
+	712	Trevor	Golden	04/05/2004	Hackney Mall, Hackney Street, E1 3AD		
+	713	Simone	Golden	01/01/2007	Hackney Mall, Hackney Street, E1 3AD		

Golden, Cat (710) ✕ Golden, Jordan (711) ✕ Golden, Trevor (712) ✕
Golden, Simone (713) ✕

With each name clicked the names appear in the list below

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

The Concerning field is now populated with all the family members.

- Click the drop down arrow alongside the **Assign to me, in team** field and select **Data Monitoring Officers** this pre populates.
- Select **Or Select Team** field it pre populates with **Data Monitoring Officers**.
- The **then Select Caseworker** populates with your details as the Select Caseworker.
- Select the **Children's Centre**.
- Click and choose the Select the **Start Date** field.
- Click **Accept** and wait for the form to be added.

The screenshot shows the 'Hackney Children's Centres Registration Form' interface. On the left, the form fields are labeled: 'Concerning', 'Assign to me, in team', 'or Select Team *', 'then Select Caseworker *', 'Select Children's Centre *', 'Select the Start Date *', and 'Form must be completed by'. On the right, a red dashed box highlights a search and selection area. This area contains a search bar with a magnifying glass icon, a list of family members: 'Golden, Cat (710)', 'Golden, Jordan (711)', 'Golden, Trevor (712)', and 'Golden, Simone (713)', each with a blue 'X' icon. Below this is a dropdown menu set to 'Data Monitoring Officers'. Another dropdown menu is also set to 'Data Monitoring Officers'. Below that is a dropdown menu set to 'Alleyne, Hester'. Another dropdown menu is set to 'Ann Tayler Children's Centre(F)'. Below these is a date field set to '25/09/2020 00:00' with a calendar icon. At the bottom of the highlighted area, the date '30/09/2020' is displayed. At the bottom right of the form, there are three buttons: 'Dismiss' (blue), 'Previous' (yellow), and 'Accept' (yellow). A red circle highlights the 'Accept' button, with a mouse cursor pointing to it.

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

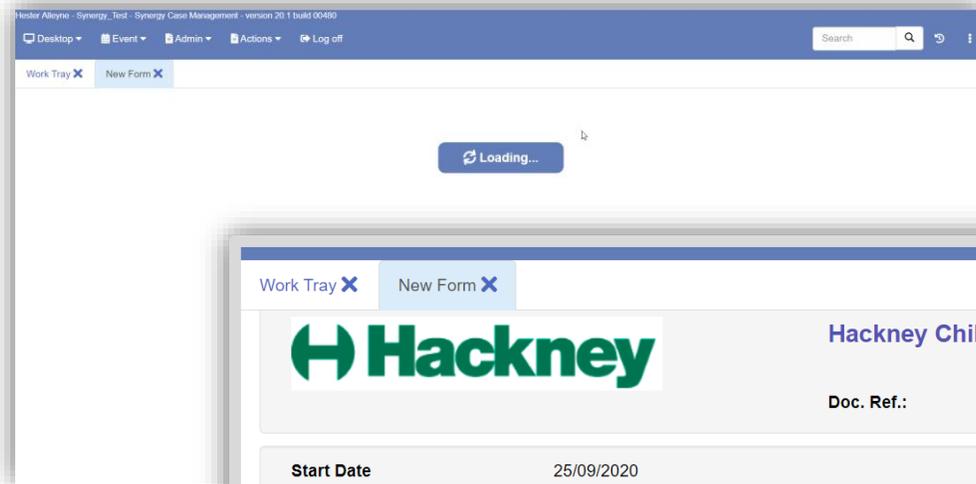
- The message *The form has been successfully added* appears, click **Ok**.

The screenshot displays a software interface for 'Hackney Children's Centres Registration'. A modal dialog box is open in the center, titled 'Form successfully added', with the message 'The form has been successfully added' and a yellow 'Ok' button circled in red. The background form is partially visible, showing fields for 'Concerning', 'Assign to me, in team', 'or Select Team *', 'then Select Caseworker *', 'Select Children's Centre *', 'Select the Start Date *', and 'Form must be completed by'. The 'Form must be completed by' field is set to '01/10/2020'. At the bottom of the form, there are buttons for 'Dismiss', 'Previous', and 'Accept'. The top of the interface shows a navigation menu with 'Menu', 'List', and 'Desktop' options, and a search bar with the text 'Golden, Jordan (711)'. The left sidebar contains a 'Work Tray' section with 'My List By Date Due' and 'All Items' (0), and 'Incomplete Actions [0]'. The bottom left corner of the slide shows the date '02/11/2020'.

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

- The Loading screen appears followed by the completion screen.

A screenshot of the 'Hackney Children's Centres Registration Form' completion screen. The form displays the Hackney logo and the title 'Hackney Children's Centres Registration Form'. It shows the document reference 'Hackney Children's Centres Registration Form/1', the start date '25/09/2020', and the assigned officer 'Alleyne, Hester (21) (Data Monitoring Officers)'. A table lists the children registered for the form, including their system reference, first name, family name, gender, date of birth, ethnicity, and address. A data protection information section is also visible at the bottom of the form.

Hackney Hackney Children's Centres Registration Form

Doc. Ref.: Hackney Children's Centres Registration Form/1

Start Date 25/09/2020 **Assigned To** Alleyne, Hester (21) (Data Monitoring Officers)

Completed By
Completed Date

Concerning						
Sys Ref	First Name	Family Name	Gender	DOB	Ethnicity	Address
710	Cat	Golden	Female	08/09/1980		Hackney Mall, Hackney Street, E1 3AD
711	Jordan	Golden	Male	30/06/1979		Hackney Mall, Hackney Street, E1 3AD
712	Trevor	Golden	Male	04/05/2004		Hackney Mall, Hackney Street, E1 3AD
713	Simone	Golden	Female	01/01/2007		Hackney Mall, Hackney Street, E1 3AD

Data Protection Information

Data Protection Information for parent or carer: Hackney Learning Trust and the London Borough of Hackney ("the Council") in collaboration with Homerton University Hospital collect this information to enable us to provide Early Years support services and integrated healthcare services at children's centres managed or commissioned by Hackney council. The Council complies with the principles and legal obligations set out within the General Data Protection Regulation 2016 (the "GDPR") and the Data Protection Act 2018 ("DPA"). The Council will only use your personal information for the purposes stated above unless additional processing is required by law or in circumstances where the relevant conditions within the GDPR and DPA are satisfied. Your personal information, including special category information (as defined by the General Data Protection Regulation), may be shared between internal departments or with external agencies involved in delivering statutory and other services for which it is responsible under relevant legislation relating to

Registering a Family at a Children's Centre - continued

Registration Form and workbook information needed for the Registration Form Process

Hackney Children's Centres Registration Form

Children's Centre Staff and Partners should complete this form during face-to-face contact with the family.

Information for parent or carer: The Learning Trust and the London Borough of Hackney in collaboration with the City and Hackney Primary Care Trust collect the following information for monitoring, analysis and data collection purposes. Your information may be disclosed to other government agencies responsible for legislation relating to children. Personal information collected in this form will only be used for the purposes it has been provided. By signing this registration form it is deemed that you understand and consent to the purposes which the information may be used for.

Parent or Carer	Mother/Father/Carer 1	Mother/Father/Carer 2
Parent/carer title (Please circle):	Mr / Mrs / Miss / Ms / Dr / Other _____	Mr / Mrs / Miss / Ms / Dr / Other _____
Parent/carer first name:		
Parent/carer last name:		
Address:		
If temporary tick here <input type="checkbox"/> 1 <input type="checkbox"/> 2		
Postcode:		
Telephone (home/mobile):		
Email address:		
Relationship to child:		
Parent/carer's date of birth (DD/MM/YYYY):		
Employment Status: (Please circle)	Employed / Employed less than 16 hours / Self-Employed / Unemployed / Full-time Parent/Carer / Full-time Education / Retired	Employed / Employed less than 16 hours / Self-Employed / Unemployed / Full-time Parent/Carer / Full-time Education / Retired
Religion:		

Registration Form

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100% £ % .0 .00 123 Default (Ca... 11 B I S A

	A	B	C	D	E	F	G	H
1	Firstname	Surname	DoB	Gender	PostCode	Children's centre	GPPpractice	Address
2								
3								
4								
5								
6								
7								
8								
9								

Information for Health Visiting Service



NOTE: PLEASE ENSURE YOU COMPLETE AS MANY PANEL AS POSSIBLE FROM THE INFORMATION DETAILED ON THE 'REGISTRAITON FORM' OR 'INFORMATION FOR HEALTH VISITING SERVICE'.

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

As you scroll down screens they will appear similar to the one below:

The screenshot shows a web application interface with a blue header bar containing 'Actions', 'Log off', and a search box. Below the header is a pink banner with contact information for Hackney Learning Trust. The main content area displays a list of three children's personal details, each in a blue header bar with an 'Edit' button. The first child is Cat Golden (Sys Ref 710, DOB 08/09/1980, Female). The second is Jordan Golden (Sys Ref 711, DOB 30/06/1979, Male). The third is Trevor Golden (Sys Ref 712, DOB 08/09/1980, Male). Red callout boxes highlight the 'Edit' button and the panel numbering.

All panels are numbered

Use the Edit button to edit information in a panel

Child Name	Sys Ref	DOB (dd/mm/yyyy)	Gender
Person > Personal Details 3 - Cat Golden	710	08/09/1980	Female
Person > Personal Details 3 - Jordan Golden	711	30/06/1979	Male
Person > Personal Details 3 - Trevor Golden	712	08/09/1980	Male

Registering a Family at a Children's Centre - continued

Add Family Group - PANEL 3 Personal Details

- Click the **Edit** button to edit specific members. The following fields have been edited; *Sexual Orientation*, *Title* and *Marital Status*.

Person > Personal Details 3 - Cat Golden **Edit**

Sys Ref	710
First Name	Cat
Family Name *	Golden
Preferred First Name	
Preferred Family Name	
Known As	
Sexual Orientation	

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Person > Personal Details 3 - Cat Golden **Save** **Cancel**

Sys Ref	710	Title	Mrs
First Name	Cat	Middle Name	
Family Name *	Golden	Date of Birth (dd/mm/yyyy)	08/09/1980
Preferred First Name		Expected Date of Birth	
Preferred Family Name		Approximate Date of Birth	
Known As		Gender	Female
Sexual Orientation	Heterosexual	Marital Status	Married

Person > Personal Details 3 - Jordan Golden **Edit**

Sys Ref	711	Title	
First Name	Jordan	Middle Name	
Family Name *	Golden	Date of Birth (dd/mm/yyyy)	30/06/1979
Preferred First Name		Expected Date of Birth	

You must click the **Save** button to save any changes

NOTE: clicking the **Save** button saves any edits. Click **Cancel** if you do not wish to save any changes.

Registering a Family at a Children's Centre - continued

Add Family Group **PANEL 5** Address

Use the Edit screen if you need to edit information for each family member, i.e. if a family member has a different address or perhaps mobile number use panels 5.

- Let's say a new address or a phone number needs to be added, from **panel 5** click the **Edit** button:

Person > Addresses 5 - Trevor Golden  														
Full Address Excl Postcode	Postcode	Ward	Address Type	Current	From Date	To Date	Unknown Address	Correspondence Address	Children's Centre Catchment	Home LA	Accommodation Type	Suitable	Planned	Notes
Hackney Mall, Hackney Street, Hackney	E1 3AD		Main	<input checked="" type="checkbox"/>	16/09/2020		<input type="checkbox"/>	<input type="checkbox"/>	Morningside Children's Centre(F)	Hackney				

- If you are adding a new address click the **+Add Row** option

Person > Addresses 5 - Trevor Golden    															
	Full Address Excl Postcode	Postcode	Ward	Address Type	Current	From Date	To Date	Unknown Address	Correspondence Address	Children's Centre Catchment	Home LA	Accommodation Type	Suitable	Planned	Notes
<input type="checkbox"/>	Hackney Mall, Hackney Street, Hackney	E1 3AD		Main	<input checked="" type="checkbox"/>	16/09/2020		<input type="checkbox"/>	<input type="checkbox"/>	Morningside Children's Centre(F)	Hackney				

Select **Main** Address if you want to use this address as the default for all correspondences being submitted. Do this for all emails also.



NOTE: Panels represent each individual members. If any member changes their address it is managed here.

Registering a Family at a Children's Centre - continued

Add Family Group **PANEL 6 Contact Details and Responsibilities**

- In the example below **Panel 6** has been selected for *Jordan Golden*.
- *Jordan's* phone number has been selected as the main telephone number by ticking the **Main Telephone Number** check box.
- *Jordan's* email address has also been added, by clicking the drop down arrow alongside the **Contact type** field, choose **Email**, then type an email address in the **Contact details** field. Click the check box **Main Email Address**.
- Click the **Save** button to save all changes for *Jordan*.

Person	Main contact	Contact details	Contact type	Main Telephone Number
	<input type="checkbox"/>	02088200000	Phone	<input type="checkbox"/>
	<input type="checkbox"/>	07841234556	Phone	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	jordan.golden@jgig.com	Email	<input type="checkbox"/>

Select if you want to make this person the main contact. You would need to select this to delete a row also, the bar updates with the relevant **Delete Row** option

All correspondences will use this Phone number as it has been selected as the main, the same applies for Email.

Registering a Family at a Children's Centre - continued



PANEL 7 The Consent to Contact

Use this panel for consent information, i.e. consent for emails to be submitted.

- Continue completing all your panels, repeat the steps outlined on page 59 using the **Edit** button.

REMEMBER: IF YOU DO NOT HAVE ALL THE RELEVANT INFORMATION PLEASE WORK WITH THE INFORMATION YOU HAVE DETAILED ON THE COMPLETED REGISTRATION FORM, FOR EXAMPLE YOU MAY NOT HAVE THE EMPLOYMENT INFORMATION OUTLINED ON THE REGISTRATION FORM, BU IT IS IMPORTANT TO COMPLETE ALL PANELS WHERE POSSIBLE BEFORE APPROVAL.

Person > Consent to Contact 7 - Cat Golden Edit			
Consent to receive mailshot emails	<input type="checkbox"/>	Consent to receive texts	<input type="checkbox"/>
Consent to receive phone calls	<input type="checkbox"/>	Consent to receive letters	<input type="checkbox"/>
Person > Consent to Contact 7 - Jordan Golden Edit			
Consent to receive mailshot emails	<input type="checkbox"/>	Consent to receive texts	<input type="checkbox"/>
Consent to receive phone calls	<input type="checkbox"/>	Consent to receive letters	<input type="checkbox"/>
Person > Consent to Contact 7 - Trevor Golden Edit			
Consent to receive mailshot emails	<input type="checkbox"/>	Consent to receive texts	<input type="checkbox"/>
Consent to receive phone calls	<input type="checkbox"/>	Consent to receive letters	<input type="checkbox"/>
Person > Consent to Contact 7 - Simone Golden Edit			
Consent to receive mailshot emails	<input type="checkbox"/>	Consent to receive texts	<input type="checkbox"/>
Consent to receive phone calls	<input type="checkbox"/>	Consent to receive letters	<input type="checkbox"/>



NOTE: It is essential you use the information on the **Registration Form** to complete as many panels as possible.

Registering a Family at a Children's Centre - continued

- Scroll through your screen and review all panels. There are up to 17 different panels.
- Scroll down to the panel that reads **Next Steps** –and the family name, *each family member has a panel*. This is the **Approve Registration** panel.

Note: panels are numbered, however, there isn't a panel numbered 8. If you are working with four members in a family this will appear four times for each member.

The screenshot shows a software interface with a list of panels. The panels are organized into sections. The first section is titled 'Relationships and Professionals > Professional Involvements 16' and contains two panels for Trevor Golden and Simone Golden. The second section is titled 'Family Centre Form > New Family Centre Registration 17' and contains four panels for Cat Golden, Jordan Golden, Trevor Golden, and Simone Golden. Each of these panels has a sub-section for 'Registered Family Centre' with fields for 'Registered Family Centre', 'Date Registered', and 'NFA Date'. The third section is titled 'Next Steps' and contains two panels for Cat Golden and Jordan Golden. The 'Next Steps' panel for Cat Golden is circled in red, and the 'Approve Registration' option is highlighted with a mouse cursor. The 'Approve Registration' option is listed under the 'Next Step' column, with a checkbox in the 'Selected' column and a 'Manager's Decision' field.

Sys Ref	Title	First Name	Family Name	Organisation	Role	From Date	To Date
Relationships and Professionals > Professional Involvements 16 - Trevor Golden Edit Filter							
Sys Ref	Title	First Name	Family Name	Organisation	Role	From Date	To Date
Relationships and Professionals > Professional Involvements 16 - Simone Golden Edit Filter							
Sys Ref	Title	First Name	Family Name	Organisation	Role	From Date	To Date
Family Centre Form > New Family Centre Registration 17 - Cat Golden Edit Filter							
Registered Family Centre				Date Registered		NFA Date	
Family Centre Form > New Family Centre Registration 17 - Jordan Golden Edit Filter							
Registered Family Centre				Date Registered		NFA Date	
Family Centre Form > New Family Centre Registration 17 - Trevor Golden Edit Filter							
Registered Family Centre				Date Registered		NFA Date	
Family Centre Form > New Family Centre Registration 17 - Simone Golden Edit Filter							
Registered Family Centre				Date Registered		NFA Date	
Next Steps - Cat Golden Edit Filter							
Next Step			Selected		Manager's Decision		
+ Approve Registration			<input type="checkbox"/>				
Next Steps - Jordan Golden Edit Filter							
Next Step			Selected		Manager's Decision		
+ Approve Registration			<input type="checkbox"/>				

Registering a Family at a Children's Centre - continued

PANEL Next Steps

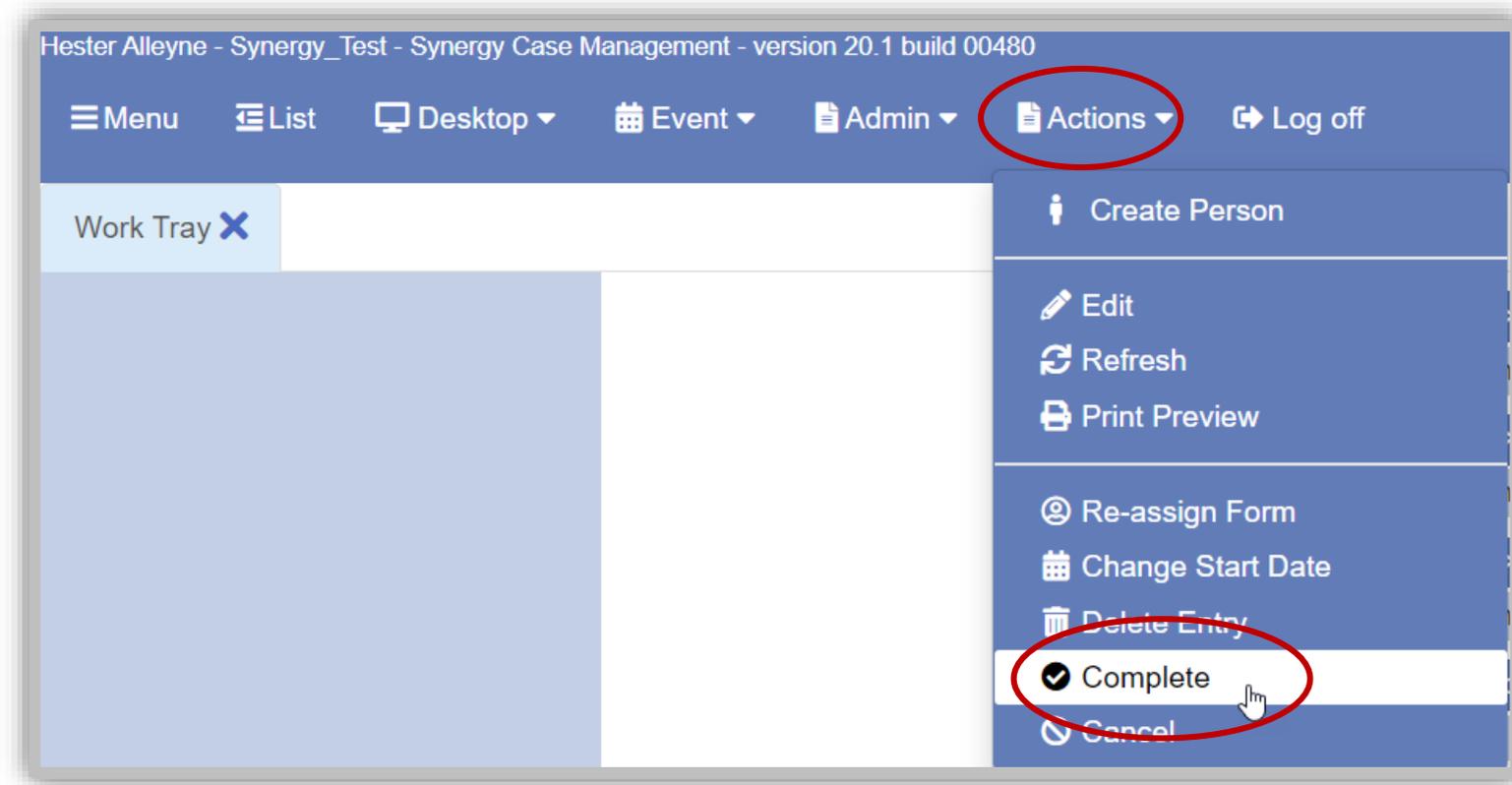
- When you have completed all the relevant information in the panels, scroll all the way down to the **Next Steps** panels and select **Approve Registration** for each member. Click the **Edit** button, click the **Selected** check box, then click the **Save** button for each record.

Only use this button to delete

NOTE: You can also approve from the main menu at the very top of the screen select **Actions** → **Edit** go back down to the Approve Registration area and select all members in the **Selected** field. From the menu bar at the top of the screen select **Action** → **Save**, then back to the menu again this time choose **Action** → **Complete**. Click **Yes** at the prompt are you sure you want to approve the form. The message **The form has been Completed** appears click **OK**.

Registering a Family at a Children's Centre - continued

. To approve everything from the menu bar at the top select **Actions** → **Complete**.



Registering a Family at a Children's Centre - continued

- At the prompt *Are you sure you want to complete this form?* Click **Yes**. From the *Form Completed* prompt click **OK**

The screenshot displays the Synergy Case Management interface. A 'Complete Form' dialog box is open, asking 'Are you sure you want to complete this form?' with 'Yes' and 'No' buttons. The 'Yes' button is circled in red. Below the dialog, a 'Form Completed' notification is shown with the message 'The form has been Completed'. The 'Ok' button in this notification is also circled in red. A red callout box with white text reads: 'The family should now be successfully registered at the Children's Centre!!!'. The background shows a table of family registrations with columns for Name, Date Registered, and NFA Date.

Name	Date Registered	NFA Date
Registration 17 - Jordan Golden		
Registration 17 - Trevor Golden		
Family Centre Form > New Family Centre Registration 17 - Simone Golden		
Registered Family Centre		
Next Steps - Cat Golden		
Next Step	Selected	Manager's Decision
+ Approve Registration	✓	

4. Creating an Activity/Event



Creating an activity/event

Adding Activities

If you need to add an activity to a family follow the steps below.

- Make sure you have a blank screen, if you have anything open simply click on the **close x** button alongside any open trays in the system tray
- From a blank Synergy screen click the **Desktop** option then **My Children's Centre**

The family centre screen opens.

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Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Home

Work Tray

My Children's Centre

Children's Centre Session Schedule

Manager Desktop

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Search

My Children's Centre X

My Children's Centres Filter

Family Centre

Ann Tayler Children's Centre(F)

Children's Centre Postcode Search Re

Postcode

Clear All Search

Active

Name Full Address

A Children Centre name must appear in the Family Centre area

Adding Activities continued

- Click the Children Centre name beneath the Family Centre, the screen updates to show the Children Centre and a list of members

The screenshot shows the Synergy Case Management interface. The top navigation bar includes 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off'. The main content area is divided into two panels. The left panel, titled 'My Children's Centres', shows a list of centres: 'Family Centre' and 'Ann Tayler Children's Centre(F)'. The 'Ann Tayler Children's Centre(F)' entry is circled in red, and a white arrow points from it to the right panel. The right panel displays the details for 'Ann Tayler Children's Centre(F) (14)'. It includes a sidebar with navigation options like 'Organisation Profile', 'Children's Centre Projects', and 'Running Record'. The main content area shows 'Organisation Details' (Name: Ann Tayler Children's Centre(F), Code: ATCC, Organisation Type: Children's Centre), 'Addresses', 'Contact Numbers and Communications', and 'Organisation Members'. The 'Organisation Members' table lists several individuals with their professional roles and start dates.

Person	Professional Role	Start Date	End Date
Wilcox, Alan (11);		18/05/2020	
Adesanya, Ibukun (16);		09/06/2020	
Alleyne, Hester (21);		25/08/2020	
Rushton, Jayne (64);		14/05/2020	
Edwards, Pauline (64);		14/05/2020	

Adding Activities continued

- From the left panel click **Children's Centre Projects** this lists all the Children's Centre Projects.

The screenshot shows the Synergy Case Management interface for 'Ann Tayler Children's Centre(F) (14)'. The left-hand navigation menu has 'Children's Centre Projects' highlighted with a red circle. The main content area displays the following sections:

- Organisation Details** (Edit):
 - Name: Ann Tayler Children's Centre(F)
 - Code: ATCC
 - Organisation Type: Children's Centre
 - Unique Reference Number (URN):
- Addresses** (Edit) (Filter):

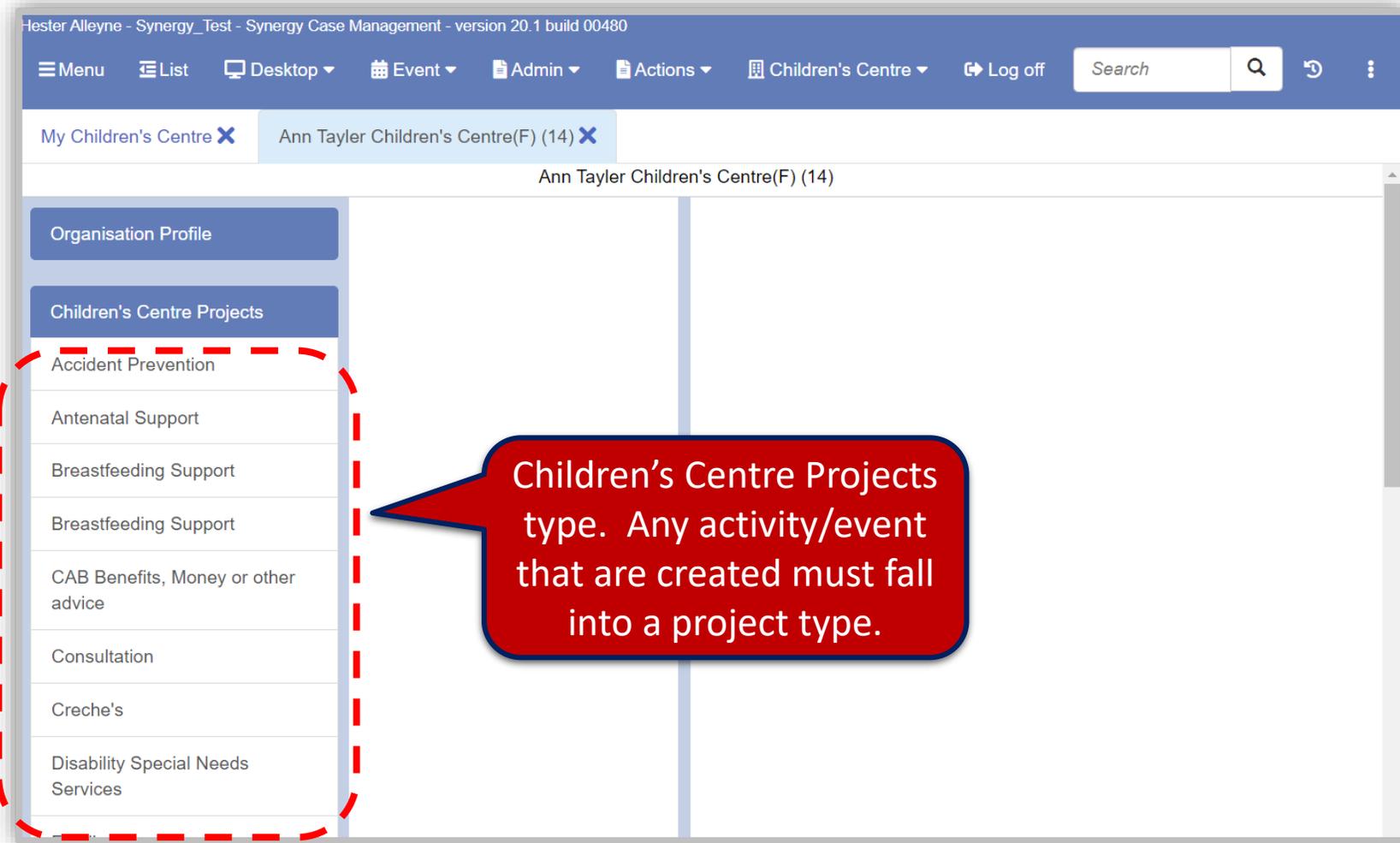
Full Address Excl Postcode	Postcode	From Date	To Date
----------------------------	----------	-----------	---------
- Contact Numbers and Communications** (Edit) (Filter):

Contact details	Contact type	Main Telephone Number	Main Email Address	Notes
-----------------	--------------	-----------------------	--------------------	-------
- Organisation Members** (Edit) (Filter):

Person	Professional Role	Start Date	End Date
Wilcox, Alan (11);		18/05/2020	
Adesanya, Ibukun (16);		09/06/2020	
Alleyne, Hester (21);		25/08/2020	
Rushton, Jayne (64);		14/05/2020	
Fadaini, Rosline (84);		16/07/2020	
Malcolm, Sandra (86);		01/07/2020	

Adding Activities continued

- The screen should appear similar to the one below, with a panel listing an estimated **20** project types. These project types are helpful when running reports and finding information:



The screenshot displays the Synergy Case Management interface. The top navigation bar includes a menu, list, desktop, event, admin, actions, children's centre, and log off options, along with a search bar. The main content area shows a list of project types under the heading "Children's Centre Projects". A red dashed box highlights this list, and a red speech bubble points to it with the text: "Children's Centre Projects type. Any activity/event that are created must fall into a project type."

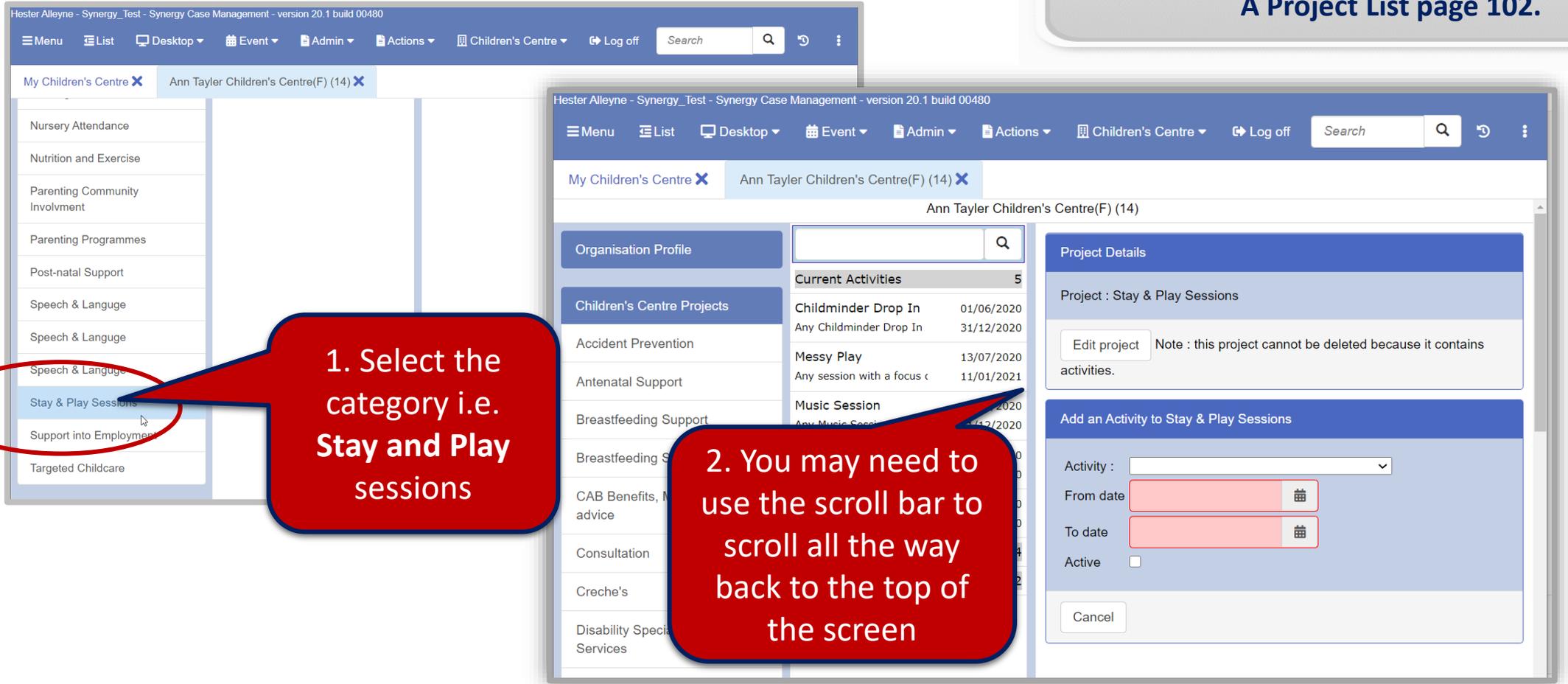
Children's Centre Projects
Accident Prevention
Antenatal Support
Breastfeeding Support
Breastfeeding Support
CAB Benefits, Money or other advice
Consultation
Creche's
Disability Special Needs Services

Adding Activities continued

- **To create an activity/event**, choose the right project type. Let's say you want to create an activity linked to *Stay and play*, locate the category for Stay and Play as a musical event may be best aligned to that category.



NOTE: Ensure you select the CORRECT project for the activity you wish to create. Please reference **Appendix A Project List page 102.**



1. Select the category i.e. Stay and Play sessions

2. You may need to use the scroll bar to scroll all the way back to the top of the screen

Current Activities	5
Childminder Drop In	01/06/2020
Any Childminder Drop In	31/12/2020
Messy Play	13/07/2020
Any session with a focus c	11/01/2021
Music Session	2020
Any Music Sessi	11/12/2020

Adding Activities continued

- Select the Activity field and click the drop down arrow and choose i.e. *Music Session*
- Complete the **From date** and **To date** fields, when the sessions start and end
- Click the **Active** check box. Click the **Add Activity** button.

The screenshot shows a web interface for adding activities. The top section is titled 'Project Details' and shows the project name 'Stay & Play Sessions' and a note that the project cannot be deleted. Below this is a section titled 'Add an Activity to Stay & Play Sessions'. This section contains a form with the following fields: 'Activity' (a dropdown menu showing 'Music Session'), 'From date' (a date picker showing '10/10/2020'), 'To date' (a date picker showing '01/12/2020'), and 'Active' (a checked checkbox). At the bottom of the form are two buttons: 'Add activity' and 'Cancel'. A red callout box with a white border points to the 'Add activity' button, containing the text '4. Click the Add Activity button'. Another red callout box points to the 'Active' checkbox, containing the text '5. Select the Active tick box'. A third red callout box points to the date fields, containing the text '3. Complete the relevant fields in this area'.

5. Select the Active tick box

3. Complete the relevant fields in this area

4. Click the Add Activity button

Adding Activities continued

- Click the **Edit** button to complete the fields for **Adult Capacity**

The screenshot shows a web application interface for managing activities. The top navigation bar includes a search box and various menu items. The main content area is titled "Ann Tayler Children's Centre(F) (14)". On the left, there is a sidebar with "Children's Centre Projects" including Accident Prevention, Antenatal Support, Breastfeeding Support, CAB Benefits, Money or other advice, Consultation, Creche's, Disability Special Needs Services, Family Learning, and Health Promotion. The central panel displays a table of activities. The first row is "Any Music Session" with dates 10/10/2020 and 01/12/2020. Below this, there is a message: "There are no session instances set up yet, to do this click Add Dates". The "Any Music Session" row has a red circle around the "Edit" button. A red callout box with the text "Click the Edit button" points to this button. Below the table, there are sections for "Adult Capacity" (Total Capacity, Location, Sessions are exclusive, Chargeable), "Public" (Public, Public Description, Category), "Notes", "Activity Workers" (with an "Edit" button and a "Filter" icon), and "Session Waiting List" (with an "Edit" button and a "Filter" icon). A table below the waiting list has columns for Priority Order, Person, Date Of Birth, and Date Added.

Adding Activities continued

- Complete the relevant fields in the Session Details area.

Adult Capacity, Total Capacity, Locations and Chargeable.

- Complete the relevant fields in the Public area.

Public and Public Description

- Click the **Save** button.

SPS - Stay & Play Sessions / Music Session > 10/10/20

Any Music Session

Session Details

Adult Capacity	<input type="text" value="10"/>	Child Capacity	<input type="text" value="10"/>
Total Capacity	20	Sessions are exclusive	<input type="checkbox"/>
Location *	<input type="text" value="Anne Taylers Childrer"/>	Chargeable	<input checked="" type="checkbox"/>

Public

Public	<input checked="" type="checkbox"/>	Public Description	<input type="text" value="Music with Jemima"/>
--------	-------------------------------------	--------------------	--

Category

Notes

Activity Workers

Person

Session Waiting List

Priority Order	Person	Date Of Birth	Date Added
----------------	--------	---------------	------------

Adding Activities continued

- The data is now successfully saved, click **Ok**.

The screenshot shows a software interface with a dark blue header and a light grey sidebar. A white dialog box titled "Save Data" is centered on the screen, displaying "Saved successfully" and a yellow "Ok" button with a mouse cursor icon. The "Ok" button is circled in red. The background interface includes a navigation menu, a search bar, and a main content area with various sections like "Organisation Profile", "Children's Centre Projects", and "Session Details".

Adding Activities continued

- The worker(s) delivering this session now need to be added. Do this by clicking the **Edit** button
- Click the **+Add Row** button, this adds a row where you can now click the Person field and find the facilitator.

SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Any Music Session

Session Details  Edit 

Adult Capacity	10	Child Capacity	10
Total Capacity	20 	Sessions are exclusive	<input type="checkbox"/>
Location *	Anne Taylers Children Centre, Cafe Area	Chargeable	<input checked="" type="checkbox"/>

Public

Public	<input checked="" type="checkbox"/>	Public Description	Music with Jemima
Category			

Notes

Activity Workers  Edit  Filter 

Person

Session Waiting List  Edit  Filter 

Priority Order	Person	Date Of Birth	Date Added
----------------	--------	---------------	------------

Adding Activities continued

- In this example; *Biddy* and *Ibukun* are selected to deliver this session, click **Save**.
- **Use the Waiting List** area to add names of anyone interested in the programme. Remember the Total capacity is set for 20 for this example.

SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Any Music Session

Session Details Edit

Adult Capacity	10	Child Capacity	10
Total Capacity	20	Sessions are exclusive	<input type="checkbox"/>
Location *	Anne Taylers Children Centre, Cafe Area	Chargeable	<input checked="" type="checkbox"/>

Public

Public

Category

Notes

Activity Workers Save Cancel Add Row Filter

Person

<input type="checkbox"/>	Hutton, Biddy (393)	
<input type="checkbox"/>	Adesanya, Ibukun (16)	

Session Waiting List Edit Filter

Priority Order	Person	Date Of Birth	Date Added
----------------	--------	---------------	------------

Review the **Waiting List** panel outlined on the following pages

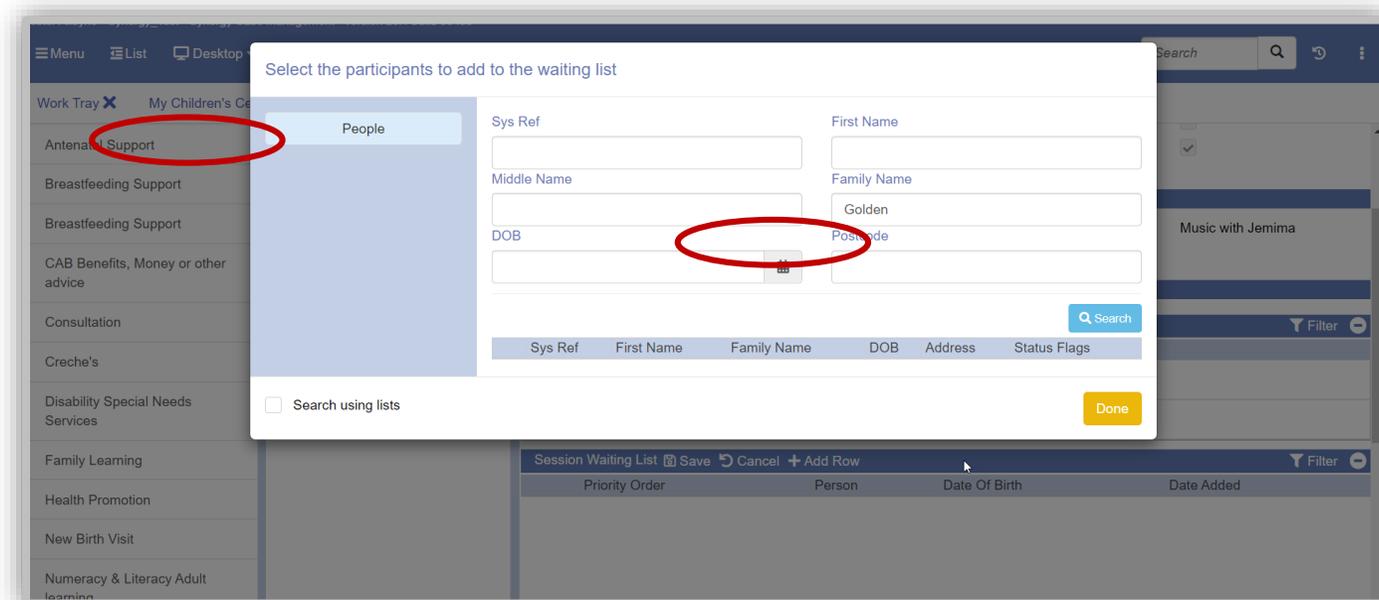
Add the facilitator/s by clicking the **+Add Row** option, then click the drop down arrow field beneath Person

Adding Activities continued

Waiting List panel

Use the **Waiting List** area at the bottom of the screen to add anyone interested in a programme as the capacity for this particular session was set to 20.

- You may need to click the plus filter button at the end of the Session Waiting List 
- Click the **Edit** button, click the **Add row** button to open the **Select the participants to add to the waiting list** search window.
- Conduct a search (this is similar to the search outlined in the section **Getting Started with Search**, page 11). *Continue with the search outlined on the next page.*



Typical standard Search screen

Adding Activities continued

- Click the **Search** button to locate member(s).
- From the list that appears, select each member you wish to add to the waiting list, their names appear in the lower section of the screen.
- **Note Repeat the Search for each member you wish to add to the waiting list.**
- When you have completed the above steps click **Done**.
- **Optional:** To delete a member from the waiting list, click **Edit**, select the member to delete from the waiting list, click the **Delete Row** button then **Save**.

Select the participants to add to the waiting list

People

Sys Ref

Middle Name

DOB

First Name

Family Name

Postcode

	Sys Ref	First Name	Family Name	DOB	Address	Status	Flags
+	710	Cat	Golden	08/09/1980	Hackney Mall, Hackney Street, E1 3AD		
+	711	Jordan	Golden	30/06/1979	Hackney Mall, Hackney Street, E1 3AD		
+	712	Trevor	Golden	04/05/2004	Hackney Mall, Hackney Street, E1 3AD		
+	713	Simone	Golden	01/01/2007	Hackney Mall, Hackney Street, E1 3AD		

Golden, Cat (710) ✕ Golden, Jordan (711) ✕ Golden, Trevor (712) ✕ Golden, Simone (713) ✕

Search using lists

Click to add each member that you wish to add to the waiting list



NOTE: Members on the list will vary, i.e. they may not all be from the same family, or all the family members may not appear on a list. It depends who has registered

Adding Activities continued

- Names appears in the waiting list area, to save the list click the **Save** option on the menu bar.

The screenshot shows the Synergy Case Management interface. The top navigation bar includes 'Menu', 'List', 'Desktop', 'Event', 'Admin', 'Actions', 'Children's Centre', 'Organisation', and 'Log off'. The main content area is divided into a left sidebar with activity categories and a main panel for session details.

Session Details:

- Total Capacity: 20
- Location: Anne Taylers Children Centre, Cafe Area
- Public:
- Public Description: Music with Jemima
- Activity Workers: Edit
- Person: Hutton, Biddy (393); Adesanya, Ibukun (16)

Session Waiting List:

Priority	Order	Person	Date Added
<input type="checkbox"/>		Golden, Cat (710);	
<input type="checkbox"/>		Golden, Jordan (711);	
<input type="checkbox"/>		Golden, Trevor (712);	
<input type="checkbox"/>		Golden, Simone (713);	

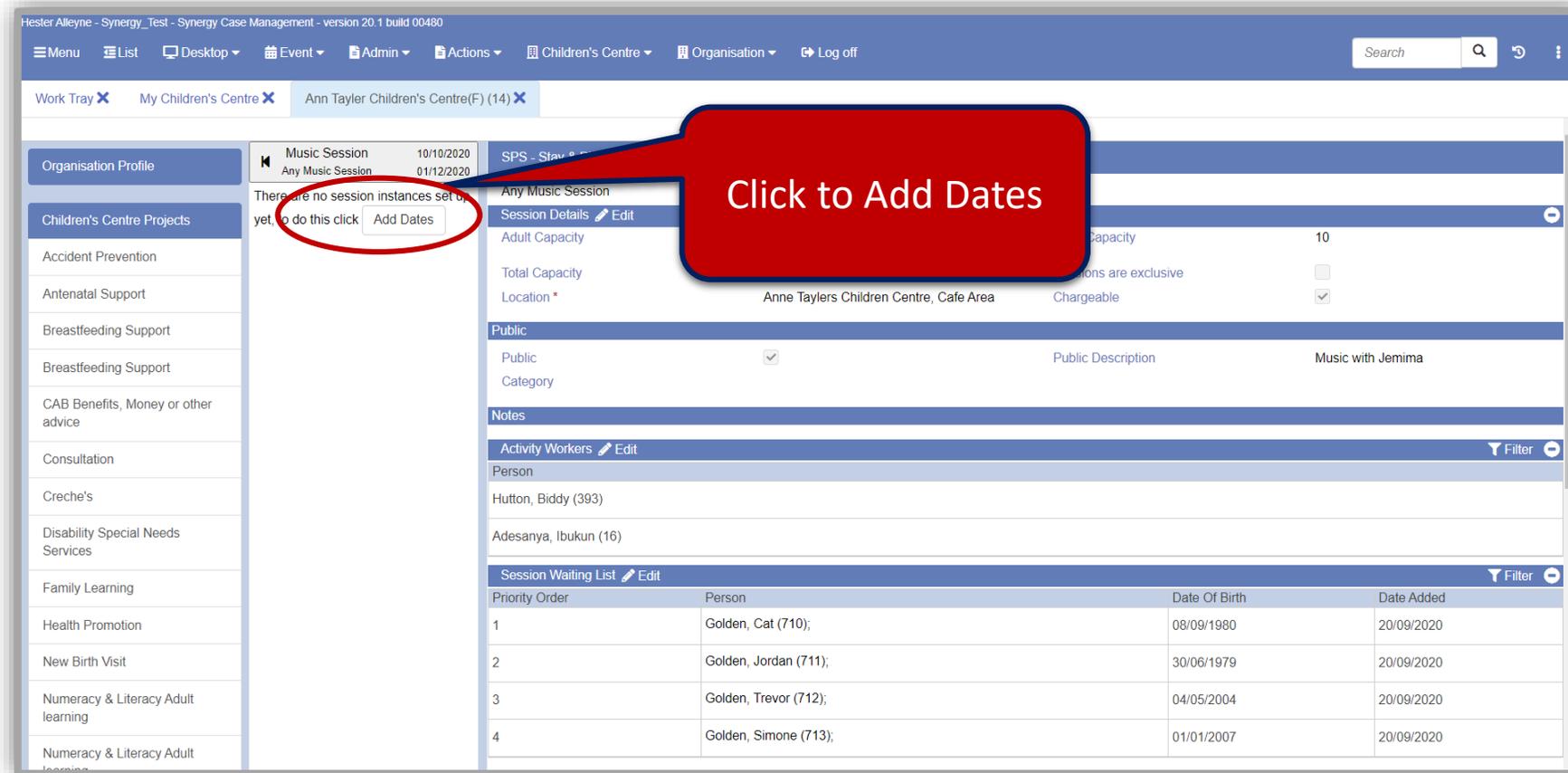
Two red callout boxes provide instructions: 'Click the Save button' points to the 'Save' button in the table's header, and 'Names now appear in the waiting list area' points to the list of names in the table.

Adding Activities continued

Adding dates:

Make sure you have saved changes and not still in Edit mode, otherwise you will not be able to add the dates.

- When you are ready to add dates click the **Add Dates** option.



The screenshot shows a software interface for managing activities. A red callout box with the text "Click to Add Dates" points to a button labeled "Add Dates" in the "Any Music Session" section. The interface includes a navigation menu on the left, a main content area with a table of session instances, and a right-hand panel with details for the selected session.

There are no session instances set up yet, so do this click **Add Dates**

Priority Order	Person	Date Of Birth	Date Added
1	Golden, Cat (710);	08/09/1980	20/09/2020
2	Golden, Jordan (711);	30/06/1979	20/09/2020
3	Golden, Trevor (712);	04/05/2004	20/09/2020
4	Golden, Simone (713);	01/01/2007	20/09/2020

Adding Activities continued

- The Add Session Dates window opens this controls sessions dates and frequency – i.e. you could run a session up until Christmas or set an occurrence pattern of 10.

Add Session Dates

SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Range of recurrence

Start * 10/10/2020

End after 10 **occurrences (or End by)**

End by 01/12/2020

Session time

Start * [Time Picker] **End *** [Time Picker] **Duration** [Duration Picker]

Dismiss **Next**

Priority Order	Person	Date Of Birth	Date Added
1	Golden, Cat (710);	08/09/1980	20/09/2020
2	Golden, Jordan (711);	30/06/1979	20/09/2020
3	Golden, Trevor (712);	04/05/2004	20/09/2020
4	Golden, Simone (713);	01/01/2007	20/09/2020

Adding Activities continued

- Complete the relevant fields in the **Session time** area and click **Next**.

Add Session Dates

SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Range of recurrence

Start* 10/10/2020

End after 10 occurrences (or End by)

End by 01/12/2020

Session time

Start* 05:00 **End*** 07:00 **Duration 2:00**

Dismiss Next

Enter the session time; i.e. start at 5:00 and finish at 7:00, Duration 2:00 hours, click Next

Adding Activities continued

- Complete the relevant fields choosing a recurrence pattern then click the **Generate Dates** button.

Add Session Dates
SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Recurrence pattern

Daily Weekly Monthly

Every day(s) Every Weekday

Add Session Dates
SPS - Stay & Play Sessions / Music Session > 10/10/2020 to 01/12/2020

Recurrence pattern

Daily Weekly Monthly

Every week(s)

on: M T W T F S S

Dismiss Previous **Generate Dates**

Adding Activities continued

A list is produced of all the programme dates.

- Check if any dates fall on a bank holiday and click to remove any using the **Remove Date** button.
- Click the **Create Dates** button to generates dates.

The screenshot shows a web interface titled "Add Session Dates" for "SPS - Stay & Play Sessions / Music Session" covering the period from 10/10/2020 to 01/12/2020. A table lists recurrence dates from 12/10/2020 to 12/11/2020, each with a circular refresh icon. At the bottom, there are four buttons: "Dismiss", "Previous", "Remove Date", and "Create Dates". The "Remove Date" and "Create Dates" buttons are circled in red. Two red callout boxes provide instructions: one points to the "Remove Date" button with the text "Remove any dates not required i.e. bank holidays, half term etc.", and the other points to the "Create Dates" button with the text "Click the Create Dates button".

Recurrence dates	
12/10/2020	↻
15/10/2020	↻
19/10/2020	↻
22/10/2020	↻
26/10/2020	↻
29/10/2020	↻
02/11/2020	↻
05/11/2020	↻
09/11/2020	↻
12/11/2020	↻

Dismiss Previous Remove Date Create Dates

Adding Activities continued

The events all appear listed.

The red exclamation mark !
Appears if the capacity for the room exceeds the location capacity.

The screenshot displays the Synergy Case Management interface for 'Ann Tayler Children's Centre(F) (14)'. It shows a list of music sessions on the left and a detailed view of a session on the right. A red callout box highlights the 'Category' field in the session details, indicating that events are listed.

Session date in the future	10
12/11/2020	10
09/11/2020	10
05/11/2020	10
02/11/2020	10
29/10/2020	10
26/10/2020	10
22/10/2020	10

Session Details	10	Child Capacity	10
Total Capacity	20	Sessions are exclusive	<input type="checkbox"/>
Location *	Ann Taylers Children Centre, Cafe Area	Chargeable	<input checked="" type="checkbox"/>

Priority Order	Person	Date Of Birth	Date Added
1	Golden, Cat (710);	08/09/1980	20/09/2020
2	Golden, Jordan (711);	30/06/1979	20/09/2020
3	Golden, Trevor (712);	04/05/2004	20/09/2020
4	Golden, Simone (713);	01/01/2007	20/09/2020

Adding Activities continued

- To view the schedule, from the menu select **Desktop** → **Children's Centre Session Schedule**. The schedule appears showing all children centres and the colour coded activities. Locate your session by selecting the date you set for your session.

The screenshot displays the Synergy Case Management interface. On the left, a navigation menu is open, showing options like Home, Work Tray, My Children's Centre, Children's Centre Session Schedule (highlighted), Manager Desktop, FWi Integration, Family Group, Children's Centres, and Autosave. A white arrow points from the 'Children's Centre Session Schedule' menu item to the calendar view on the right.

The calendar view shows the month of September 2020. The days of the week are Mon, Tue, Wed, Thu, Fri, Sat, and Sun. The calendar is populated with various activities, each represented by a colored block. The activities include:

- CV Writing Course
- Henry Programme
- Talking Walk In
- Creche
- Antenatal Parenting Course
- Paediatric First Aid
- Money Advice
- Breastfeeding Drop In
- ESOL Course
- Speech and Language Groups S
- Messy Play
- Stay and Play
- Music Session
- Consultation
- Paediatric First Aid
- ESOL Course

The calendar also shows dates from 10/10/2020 to 02/11/2020. The interface includes a search bar and navigation controls for the calendar view.

Booking or Adding Attendees to Sessions

To book/add attendees to a session;

- Locate the session from calendar view and click it, then click the **date/time link** (appears as a blue hyperlink) to open the session.

The screenshot shows a web application interface for Synergy Case Management. At the top, there is a navigation bar with 'Desktop', 'Event', 'Admin', 'Actions', and 'Log off' options, along with a search bar. Below this is a breadcrumb trail: 'Work Tray', 'My Children's Centre', 'Ann Tayler Children's Centre(F) (14)', and 'Children's Centre Session Schedule'. The main area is a calendar for November 2020, with columns for Monday through Thursday. Sessions are represented by colored blocks: purple for 'Music Session', orange for 'Breastfeeding Drop In', and teal for 'Messy Play'. A 'Session Details' panel is open on the right, showing information for a 'Music Session' on Thursday, 12th Nov 2020, from 5:00 am to 7:00 am. The details include 'Places remaining: 20 of 20' and various counts for attendance. A red circle highlights the date and time '5:00 am - 7:00 am Thursday 12th Nov 2020' in the details panel, and a red callout bubble points to it with the text 'Click the link to open the session'.

Booking or Adding Attendees to Sessions continued

- If you need to Edit session data from this view click the **Edit** button in each panel areas, edit then **Save**.
- To start adding people, from the menu select **Children's Centre** → **Add people**.

The screenshot displays the Synergy Case Management interface. The top navigation bar includes 'Menu', 'List', 'Desktop', 'Event', 'Admin', 'Actions', 'Children's Centre', 'Organisation', and 'Log off'. A search bar is located on the right. The main content area is divided into several sections:

- Organisation Profile:** Shows details for 'Ann Tayler Children's Centre(F) (14)'.
- Children's Centre Projects:** A list of projects including 'Accident Prevention', 'Antenatal Support', 'Breastfeeding Support', 'CAB Benefits, Money or other advice', 'Consultation', 'Creche's', 'Disability Special Needs Services', 'Family Learning', 'Health Promotion', 'New Birth Visit', 'Numeracy & Literacy Adult learning', and 'Numeracy & Literacy Adult'.
- Session Details:** A table showing session information for 'Music Session' and 'Any Music Session'.
- Session Form:** A form for editing session details, including fields for 'Total Capacity' (20), 'Location' (Anne Taylers Children Centre, Cafe Area), 'Additional Attendees' (0), 'Date' (12/11/2020), 'To' (07:00), 'Child Capacity' (10), 'Session is exclusive' (checkbox), and 'Chargeable' (checkbox).
- Public Section:** A section for public sessions, including a 'Public' checkbox and a 'Public Description' field (Music with Jemima).
- Notes Section:** A section for session workers, including a 'Session Workers' table with columns for 'Person', 'Concerning', 'Outcome Date', 'Outcome Type', 'Main Outcome', and 'Status'.

Red circles highlight the 'Actions' menu and the 'Add People' option in the dropdown menu.

Booking or Adding Attendees to Sessions continued

This opens the Select the participants to add to this session window.

- Select **People** in the left panel.
- Complete relevant fields by selecting the member that appear from the result of the search.
- Then click **Done**.

The screenshot shows a web interface for selecting participants. On the left, a sidebar contains a list of categories: My Cases, People, Carers, Professionals, and Relationships. The 'People' category is highlighted with a red oval. A red callout bubble points to it with the text 'Ensure People are selected'. The main area contains a search form with fields for Sys Ref, First Name, Middle Name, Family Name, and a date picker for DOB. Below the form is a table of search results with columns for Sys Ref, First Name, Family Name, DOB, and Status Flags. A red callout bubble points to the search fields with the text 'Use relevant fields to conduct your search'. Below the table, there are four tags representing selected members: 'Baggio, Asha (695)', 'Baggio, Calvin (697)', 'Baggio, Kelvin (699)', and 'Baggio, Candy (701)'. A red callout bubble points to these tags with the text 'Click to select members'. At the bottom right, a yellow 'Done' button is circled in red.

Select the participants to add to this session

My Cases
People
Carers
Professionals
Relationships

Sys Ref
First Name
Middle Name
Family Name
DOB

Search

	Sys Ref	First Name	Family Name	DOB	Status	Flags
+	695	Asha	Baggio	01/01/19	E1	3AD
+	697	Calvin	Baggio	02/02/19	E1	3AD
+	699	Kelvin	Baggio	04/04/20	E1	3AD
+	701	Candy	Baggio	07/07/20	E1	3AD

Baggio, Asha (695) X
Baggio, Calvin (697) X
Baggio, Kelvin (699) X
Baggio, Candy (701) X

Done

Booking or Adding Attendees to Sessions continued

- The attendee names appears in the list area. Click a member from the list.

The screenshot shows a software interface for session booking. The top navigation bar includes a search bar and various menu options. The main content area is divided into several sections:

- Organisation Profile:** Displays 'Ann Taylers Chi...' with a date of 12/11/2020 and a remaining capacity of 20.
- Children's Centre Projects:** Lists various services such as 'Accident Prevention', 'Antenatal Support', 'Breastfeeding Support', 'CAB Benefits, Money or other advice', 'Consultation', 'Creche's', 'Disability Special Needs Services', 'Family Learning', 'Health Promotion', and 'New Birth Visit'.
- Attendee List:** A table listing attendees with their names and dates of birth. The first entry, 'Golden, Cat (710)' with a date of birth of 08/09/1980, is circled in red. A red callout bubble with the text 'Click to choose a member' points to this entry.
- Session Details:** Shows 'Any Music Session' with a date of 12/11/2020, time 13:00 - 15:00, and a child capacity of 10.
- Additional Attendees:** A section for adding more attendees.
- Public Description:** A section for describing the session, with the description 'Music Session'.
- Notes:** A section for adding notes.
- Session Workers:** A section for listing session workers, with 'Rushton, Jayne (64)' listed.
- Family Centre Outcome:** A section for listing outcomes, with columns for 'Concerning', 'Outcome Date', 'Outcome Type', 'Main Outcome', 'Status', and 'Outcome Notes'.

Booking or Adding Attendees to Sessions continued

- When a member has been selected click the **Edit** button.

The screenshot displays the Synergy Case Management interface. The top navigation bar includes a search box and various menu options. The main content area shows a session titled "Music Session" for "Ann Tayler Children's Centre(F) (14)". The session details include the date "01/06/2020" and "Any Music Session" ending on "31/12/2020". The session is scheduled for "12/11/2020" from "13:00 - 15:00" with a total capacity of 20 and 24 of 31 attendees. The "Participants" section lists four members: Golden, Cat (710) with date 08/09/1980; Golden, Jordan (...) with date 30/06/19...; Golden, Simone ... with date 01/01/2007; and Golden, Trevor (with date 04/05/2004. The "Golden, Cat" member is selected, and the "Edit" button is highlighted. A red callout bubble with white text points to the "Edit" button, stating: "When a member is chosen click Edit".

Booking or Adding Attendees to Sessions continued

- Click to choose an option from the listed check boxes; *Invited*; *Booked*; *Attended* or *Cancelled* then click the **Update** button, beneath the tick boxes.

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Menu List Desktop Event Admin Actions Children's Centre Log off

Search Search Children's Centre Session Schedule Ann Tayler Children's Centre(F) (14)

Ann Tayler Children's Centre(F) (14)

Organisation Profile	Music Session 01/06/2020 Any Music Session 31/12/2020
Children's Centre Projects	Anne Taylers Chi... 12/11/2020 Total Capacity : 20 13:00 - 15:00 Attended : 0 24 of 31 Remaining : 20
Accident Prevention	
Antenatal Support	
Breastfeeding Support	Participants 4
Breastfeeding Support	Golden, Cat (710) 08/09/1980 Total/Prj/Act 1 / 1 / 0

Golden, Cat

Invited
Booked
Attended
Cancelled

Update Delete from session Cancel Switch to bulk mode

In this example **Booked** has been selected



NOTE: You can use the Invited, Booked an Attended options. Invited is a popular choice and a great way of tracking attendees.

Booking or Adding Attendees to Sessions continued

Using Bulk Mode

- Optional: You can select single attendees or opt for the bulk mode option; click the **Switch to Bulk Mode** to select all members.

The screenshot displays a software interface for managing session attendees. On the left, a sidebar shows session details for 'Music Session' (01/06/2020) and 'Any Music Session' (31/12/2020). Below this, it lists 'Anne Taylers Chi...' with a date of 12/11/2020, a total capacity of 20, and 24 of 31 attendees. A search bar and a 'Participants' section with 4 members are also visible. The main panel shows details for 'Golden, Cat', including status options: 'Invited' (unchecked), 'Booked' (checked), 'Attended' (unchecked), and 'Cancelled' (unchecked). At the bottom of this panel, there are buttons for 'Update', 'Delete from session', 'Cancel', and 'Switch to bulk mode'. The 'Switch to bulk mode' button is circled in red, and a red callout bubble points to it with the text 'Select Switch to bulk mode'.

Booking or Adding Attendees to Sessions continued

Bulk Mode continued:

- Click the button **Select All Participants**, click **Bulk Update** – all members now selected with all check boxes now ticked in the list view panel.
- To cancel Bulk Mode click the **Cancel Bulk Mode** button.

The screenshot displays a software interface for managing a music session. On the left, a sidebar shows session details: "Music Session" (01/06/2020 - 31/12/2020), "Any Music Session" (31/12/2020), and "Anne Taylers Chi..." (12/11/2020). It also indicates "Total Capacity : 20", "Attended : 0", and "Remaining : 20". Below this is a search bar and a "Participants" section showing 4 participants, all with checked checkboxes.

The main panel features a yellow header with the text "Select participants in the list on the left." and two buttons: "Select All Participants" (circled in red) and "Un-Select All Participants". Below this is a blue header for "Bulk edit for Golden, Cat (710), Golden, Jordan (711), Golden, Simon (712), Golden, Trevor (712)". The bulk edit options are: "Invited" (checkbox), "Booked" (checked checkbox), "Attended" (checkbox), and "Cancelled" (checkbox). At the bottom of the bulk edit panel are three buttons: "Bulk Update" (circled in red), "Bulk Delete from session", and "Cancel Bulk Mode".

A red callout bubble with white text points to the "Bulk Update" button, stating: "All members are now all selected".

Booking or Adding Attendees to Sessions continued

- Once booked names are updated and tagged accordingly.

Make use of *Invited*, *Booked*, *Attended* and *Cancelled* options – follow the same process outlines on pages 94-97.

NOTE: Work with booking options that best suits the service being offered. For example using the **Inviting** function for a session for New Births will enable you to track those that have not attended. However, Attended is mandatory.

Menu List Desktop Event Admin Actions Children's Centre Log off

Search X Search X Children's Centre Session Schedule X Ann Tayler Children's Centre(F) (14) X

Ann Tayler Children's Centre(F) (14)

Music Session 01/06/2020
Any Music Session 31/12/2020

Anne Taylers Chi... 12/11/2020
Total Capacity : 20 13:00 - 15:00
Attended : 0 24 of 31
Remaining : 16

Participants 4

Golden, Cat (710)	03/09/1980	B
Golden, Jordan (...)	30/06/1979	B
Golden, Simone ...	01/01/2007	B
Golden, Trevor (...)	04/05/2004	B

Invited
Booked
Attended
Cancelled

Edit

Additional Bulk Text

Screen updates showing a B (Booking) alongside each member which signifies a booking

Booking or Adding Attendees to Sessions continued

- If you have selected an option it will appear greyed out. An indicator letter appears alongside member names.

Hester Alleyne - Synergy_Test - Synergy Case Management - version 20.1 build 00480

Menu List Desktop Event Admin Actions Children's Centre Log off

Search Search Children's Centre Session Schedule Ann Tayler Children's Centre(F) (14)

Ann Tayler Children's Centre

Music Session	01/06/2020
Any Music Session	31/12/2020

Anne Taylers Chi... 12/11/2020

Total Capacity : 20 13:00 - 15:00

Attended : 0 24 of 31

Remaining : 16

Participants 4

Golden, Cat (710)	08/09/1980	B
Golden, Jordan (...)	30/06/1979	B
Golden, Simone ...	01/01/2007	B
Golden, Trevor (...)	04/05/2004	B

Golden, Cat

Invited

Booked

Attended

Cancelled

Additional opti

Email

Create Bulk Text

Booked appears dimmed

Notice when booked a B appear alongside member names

Booking or Adding Attendees to Sessions continued

Return to the schedule **Desktop** → **Children's Centre Session Schedule** (or **Home** if set as default) to view updates.
In the example below **4** attendees are booked for this session. Names are listed in the lower area of the Session Details panel.

Repeat the process for *Inviting, Booking* and marked as *Attended*.

The screenshot displays a web-based session management interface. At the top, there are navigation tabs: Desktop, Event, Admin, Actions, and Log off. Below this is a search bar and a breadcrumb trail: Children's Centre Session Schedule > Ann Tayler Children's Centre(F) (14). The main area is a calendar for November 2020, showing sessions for Monday through Friday. A 'Session Details' panel is open on the right, showing information for a 'Music Session' on Thursday, 12th Nov 2020. The panel includes fields for 'Invited: 0', 'Booked: 4', 'Cancelled: 0', and 'Paid: 0'. A red dashed circle highlights the 'Booked: 4' field, and a red callout box with white text points to it, stating: 'Screen updates accordingly i.e. Booked is showing 4 attendees who have booked on this session'. Below the session details, there is a list of 'Session Participants' with checkboxes and names like 'Golden, Cat (710)', 'Golden, Jordan (711)', etc.

Appendix A. Project Type & Activities



Project Type & Activities Listing

Project List

A.

Project Type	Activity Name	Description
Accident Prevention	Paediatric First Aid	First Aid Courses for Parents
Accident Prevention	Coping With Crying	NSPCC Coping With Crying Session
Adult Learning	Child Care Course	Any level Child Care Course
Adult Learning	Beauty Therapy	Any Level Beauty Therapy Course
Adult Learning	Craft Course	Any craft course sewing knitting
Adult Learning	Gardening Course	Any Adult gardening course
Adult Learning	Computer Skills Course	Any IT Skills Course Does not include CV writing
Antenatal Support	Midwifery Clinic	Any Antenatal Midwifery Clinic
Antenatal Support	Antenatal Parenting Course	Any course delivered to a group of parents at antenatal stage.
Breastfeeding Support	Breastfeeding Drop in	Any group support for Breastfeeding
CAB Benefits, Money or Other Advice	CAB Appointments	Any CAB appointments
CAB Benefits, Money or Other Advice	Money advice	ANY course delivered for to support economic well being i.e. Money Smart
Nursery Attendance	Nursery attendance	Attendance of children attending registered day care at the centre every child to be logged once every half term (6 weeks)
Crèches	Crèche	Crèche for any service excluding ESOL or respite
Crèches	Summer Camp	Any School holiday provision where parents do not attend.
Respite Crèche	Respite Crèche	For targeted work
Disability Special Needs Services	Sensory Room Activities	Any session delivered internally or by external providers taking place in sensory rooms
Disability Special Needs Services	Specialist Disability Service	Any session delivered for children with additional needs or a disability

B.

Project Type	Activity Name	Description
Speech And Language	Talking Walk in	SALT Talking Walk in session
Speech and Language	Speech and Language group sessions	SALT group session
Disability Special Needs Services	Portage Group sessions	SALT 121 Sessions
Disability Special Needs Services	Portage 121 Centre Support	Portage 121 support held in the Centre
ESOL Adult Learning	ESOL Course	ESOL Adult learning any level
Family Learning Session	Family Learning Session	Any Family Learning where children are present for some or all of the course excludes Henry or any cooking classes
Health Promotion	First Steps 121 Sessions	Any First Steps Psychology 121 sessions including therapy
Health Promotion	First Steps Group sessions	Any First Steps Psychology group sessions including therapy
Health Promotion	Child Health Clinic	Child Health clinics baby weighing etc.
Health Promotion	Child Health Development Reviews	Any Child Development Reviews
Health Promotion	Oral Health Sessions	Any Oral Health Sessions
Numeracy and Literacy Adult Learning	Adult Numeracy Course	Any Level Adult Numeracy Course
Numeracy and Literacy Adult Learning	Adult Literacy Course	Any Level Adult Literacy Course
Nutrition and Exercise	Henry Programme	Henry Parenting Programme
Nutrition and Exercise	Henry Starting Solids	Henry Starting Solids Course
Nutrition and Exercise	Henry Celebration Event	Any Henry Celebration Event
Nutrition and Exercise	Adult Exercise Class	Any Adult exercise class
Nutrition and Exercise	Family Cooking Classes	Any cookery or food preparation courses.
Nutrition and Exercise	Children's Exercise Sessions	Physical literacy programmes, movement sessions Dancing etc. (excludes Music Sessions)

Project Type	Activity Name	Description
Outreach /Open Days and Parental Involvement	Welcome To your Children's Centre	Session to welcome new families to the centre
Outreach /Open Days and Parental Involvement	Open Day	Any Fun/Open day excludes Job Fair
Outreach /Open Days and Parental Involvement	Parent Forum	Any Parent Forum Event Including Forum meeting
Outreach /Open Days and Parental Involvement	Advisory Board	Any Advisory board or partnership meeting where parents attend.
Outreach /Open Days and Parental Involvement	Consultation	Any Event where parents are invited to attend to consult on service changes.
Outreach /Open Days and Parental Involvement	Local Outreach	Contact with families outside of the centre to promote centre services
Outreach /Open Days and Parental Involvement	Parent Run Activity	Any session run by parents for parents
Parenting Programmes	Evidenced Based Parenting Programme	Any evidenced based parenting programme e.g. SFSC Triple P excludes Henry Course
Parenting Programmes	Parent Workshops	Any one off workshops that support parenting.
Parenting Programmes	Domestic Abuse Support Group	Any session or programme aimed at supporting victims of Domestic Abuse
Post Natal Support	Postnatal clinic	Midwifery Clinic
Post Natal Support	Postnatal Support Session	Any session delivered to support first few weeks after birth. Excludes Breastfeeding support, Child health Clinic Henry starting solids.

Project Type	Activity Name	Description
Stay and Play Sessions	Stay and Play	Any Session excluding a focused Messy Play or Music Session
Stay and Play Sessions	Messy Play	Any session with a focus on Messy Play
Stay and Play Sessions	Music Session	Any Music session
Stay and Play Sessions	Childminder Drop in	Any Childminder Drop in
Supported Into Employment	Job Search	Any Job Search Session
Supported Into Employment	CV Writing Course	Any CV Writing Course
Supported Into Employment	Building Confidence / Interview techniques	Any course aimed at supporting groups into employment excludes CV Writing / Interview techniques
MAT Early Help	Referral to MAT	To be used by HE MAT admin team only when a family is referred
MAT Early Help	MAT meeting	To add al children discussed at MAT meeting
Targeted Family Support	Targeted Family Support Contacts	For all contacts with families open to targeted family support.
Targeted Family Support	Targeted Family Support workshops	For any attendance at a course/workshop for targeted families only

