

Family Children Centre
QUICK GUIDE
RELATIONSHIPS



Logging in

Getting Started

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

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

The screenshot shows the Synergy Sign In interface. On the left is a dark blue sidebar with a large stylized 'S' logo and text: 'Synergy_Test', 'Version 21.1.0.277', and '© 2021 Servelec Education Ltd'. The main content area is white and features the Synergy logo at the top right, the text 'Sign In', and two input fields. The first field contains the text 'TLTDOM\HALleyne' and the second field contains a series of dots representing a password. At the bottom right of the main area is a dark blue button with a right-pointing arrow and the text 'Sign In'. Two red callout boxes with white text are present: one pointing to the top right of the main content area with the text 'Click here to sign in', and another pointing to the 'Sign In' button with the text 'Click to continue'.

Creating Relationships

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



Welcome to Hackney's Children's Centre System (TRAINING SITE)

The screenshot shows a web-based calendar interface for April 2021. The calendar is displayed in a grid format with columns for days of the week (Mon to Sun) and rows for weeks. The date 23/04 is highlighted in yellow. The interface includes navigation controls at the top, such as '< Today >' and 'April 2021', and a menu with options 'Day', 'Agenda', 'Week', 'Month', and 'Filter'. The 'Month' option is currently selected.

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

The Scheduler Screen

29/04/2021

Use Search

- Click **Person Search** → **People**

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Desktop ▾ Event ▾ Admin ▾ Actions ▾ Log off

Search

Children's Centre Session Schedule X Search X Search X

Search

- My Cases
- People**
- Family Group
- Organisations
- Professionals

Sys Ref

Middle Name

DOB

First Name

Family Name

Sys Ref	First Name	Middle Name	Family Name	DOB	Status Flags
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Searching continued

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

The screenshot shows the Synergy Case Management interface. The search form includes fields for Sys Ref, Middle Name, DOB, First Name, Family Name, and Postcode. The search button is circled in red and labeled '2'. The search results table is circled in red and labeled '3'. The Sys Ref number '76' in the first row of the table is circled in red and labeled '3'. A red callout box points to the Sys Ref number with the text: 'The member record appears. Click on the Sys Ref number shown'.

Search

Sys Ref	First Name	Family Name	DOB	Address	Status Flags
76	Donald	Trump	05/02/1986		

The Family Maintenance Options

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

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Menu Desktop Event Admin Actions Log off

Search

Children's Centre Session Schedule Search Search Trump, Donald (76)

Person Profile

Person

Additional Person Details

Relationships and Professionals

Education & Training

Health

Children's Centre

Family Maintenance

Running Record

Personal Details Edit

Sys Ref	76	Title	
First Name	Donald	Middle Name	
Family Name *	Trump	Date of Birth (dd/mm/yyyy)	05/02/1986
Preferred First Name		Expected Date of Birth	
Preferred Family Name		Approximate Date of Birth	
Known As		Gender	Male
Sexual Orientation		Marital Status	

Aliases Edit

Alias Family Name	Alias Forename(s)	Alias Title	Alias Type	Alias Start Date	Alias End Date
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Consent to Share Information Edit

Check this box to allow sharing of information with Tier 3 users or uncheck to remove

Addresses Edit

Full Address Excl Postcode	Postcode	Ward	Address Type	Current	From Date	To Date	Unknown Address	Correspondence Address	Family Centre Catchments	Home LA	Accommodation Type	Suitable	Planned	Notes
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Contact Details and Responsibilities Edit

Person	Main contact	Contact details	Contact type	Main Telephone Number	Main Email Address	Emergency contact	Medical consent	Notes
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Ethnicity Edit

Ethnicity	Ethnic Source	<Unknown>
Notes		

Personal Information Edit

Language	Second Language
Religion	Place of Birth
Interpreter Required	Translation Required
Driving Licence	Car Owner

Nationalities Edit

Nationality	Main	From Date	To Date
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Select the Family Maintenance option

Locating the Family Group reference number...

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

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Menu Desktop Event Admin Actions Log off

Children's Centre Session Schedule Search Search Trump, Donald (76)

Trump, Donald (76) DOB:05/02/1986

Person Profile

Family Maintenance

Running Record

Group by Surname

Trump 4

(M) Trump, David (75)
dob: 15/10/2020
address:
postcode:
address from:

+ Add

(M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
Telephone Number:
Current Groups: Trump (Family Group) (79)

1986

Click the System Reference Number

Working with the Family Group...

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

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Menu Desktop Event Admin Actions Log off Search

Children's Centre Session Schedule Search Search Trump, Donald (76) Trump (79)

Trump (79)

Family Group

Family Group

Education

Running Record

Family Group Details Edit

Family Group Name * Trump Family Group Sys Ref 79

Legacy Ref Family Group Type * Family Group

Family Group Members Edit Filter

Person	DOB	Main Family Contact	Current Start Date	End Date	Address	Stronger Family Consent	Warn Status	Flags
Trump, Halima (77);	02/02/2021	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021		<input type="checkbox"/>		
Trump, David (75);	15/10/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021		<input type="checkbox"/>		
Trump, Donald (76);	05/02/1986	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021		<input type="checkbox"/>		
Trump, Sarah (78);	12/02/1986	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021		<input type="checkbox"/>		

Family Group Employment Status Filter

Family Member Name	Family Member From	Family Member To	Current Family Member	Employment Status Start Date	Employment Status End Date	Employment Status	Current Employment Status
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Family Group Benefits Filter

Family Member Name	Family Member From	Family Member To	Current Family Member	Benefit Start Date	Benefit End Date	Benefit Type	Current Benefit
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Grouping members into correct relationships...

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

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Children's Centre Session Schedule X Search X Search X Trump, Donald (76) X Trump (79) X

Trump (79)

Family Group Details Edit

Family Group Name * Trump Family Group Sys Ref 79

Legacy Ref Family Group Type * Family Group

Family Group Members Edit Filter

Person	DOB	Main Family Contact	Current	Start Date	End Date	Address	Stronger Family Consent	Warn	Status	Flags
Trump, Halima (77);	02/02/2021	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021			<input type="checkbox"/>			
Trump, David (75);	15/10/2020	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021			<input type="checkbox"/>			
Trump, Donald (76);	05/02/1986	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021			<input type="checkbox"/>			
Trump, Sarah (78);	12/02/1986	<input type="checkbox"/>	<input checked="" type="checkbox"/>	30/03/2021			<input type="checkbox"/>			

Family Group Employment Status Filter

Family Member Name	Family Member From	Family Member To	Current Family Member	Employment Status Start Date	Employment Status End Date	Employment Status	Current Employment Status
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Family Group Benefits Filter

Family Member Name	Family Member From	Family Member To	Current Family Member	Benefit Start Date	Benefit End Date	Benefit Type	Current Benefit
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Other family members in the group appear here with a system number alongside

Selecting family members...

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

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Menu Desktop Event Admin Actions Log off

Children's Centre Session Trump, Donald (76) Trump (79)

Trump, Donald (76) DOB:05/02/1986

Person Profile

Family Maintenance

Running Record

Search

(M) Trump, David (75)
dob: 15/10/2020
address:

(M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
Telephone Number:
Current Groups: Trump (Family Group) (79)

Click the tab to review the family member tab you searched on

Using the Add button to add family members...

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

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Menu Desktop Event Admin Actions Log off

Children's Centre Session Trump, Donald (76) Trump (79)

Trump, Donald (76) DOB:05/02/1986

Person Profile

Family Maintenance

Running Record

With the selected name tab locate and click the **Add** option

Search

+

Add

(M) Trump, David (75)
dob: 15/10/2020
address:

(M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
Telephone Number:
Current Groups: Trump (Family Group) (79)

Entering the sys reference number...

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

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 Middle Name

Family Name

Known As

Gender

Date of Birth Expected Date of Birth

Address

Postcode

Enter the system ref number for the family member

Using the Search option...

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

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

This id is already in the family list

☰ (F) Trump, Sarah (78) dob: 12/02/1986

The family member appears

Create person

First Name	<input type="text" value="Mich"/>
Family Name	<input type="text"/>
Known As	<input type="text"/>
Gender	<input type="text" value="Not Specified"/>
Date of Birth	<input type="text" value=""/>
Address	<input type="text"/>
Postcode	<input type="text"/>


Expected Date of Birth

Add new or existing family members...

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

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

Person found. Select 'add' to bring them in to the list

 (M) Trump, Mick (80) dob: 24/02/1980

Using the middle pane to see family members...

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

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Menu Desktop Event Admin Actions Log off

Search

Children's Centre Session Schedule Search Trump, David (75) Trump, Sarah (78)

Trump, David (75) DOB:15/10/2020

If you want to add an existing person to the family list, and you know the **Sys Ref**, you can enter it here. 80 Search

Person Profile

Family Maintenance

Running Record

Group by Surname

Trump 5

- (M) Trump, David (75)
dob: 15/10/2020
address:
postcode:
address from:
- (M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
address from:
- (F) Trump, Halima (77)
dob: 02/02/2021
address:
postcode:
address from:
- !(M) Trump, Mick (80)
dob: 24/02/1980
address:
postcode:
address from:
- (F) Trump, Sarah (78)
dob: 12/02/1986
address:
postcode:
address from:

Create person

First Name Middle Name

Birth

cancel

Family members that you are building a relationship with appear in this pane.

Using the Edit button...

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

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Menu Desktop Event Admin Actions Log off Search

Children's Centre Session Schedule Search Trump, David (75) Trump, Sarah (78)

Trump, David (75) DOB:15/10/2020

Person Profile Family Maintenance Running Record

Group by Surname

Trump 5

(M) Trump, David (75)
dob: 15/10/2020
address:
postcode:
address from:

(M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
address from:

(F) Trump, Halima (77)
dob: 02/02/2021
address:
postcode:
address from:

!(M) Trump, Mick (80)
dob: 24/02/1980
address:
postcode:
address from:

(F) Trump, Sarah (78)
dob: 12/02/1986
address:
postcode:
address from:

Add

1 person has no relationships set up

(M) Trump, Mick (80)
dob: 24/02/1980
address:
postcode:
Telephone Number:
Current Groups:

No family relationships currently exist for this person.
To add some, click edit, then select the relevant people in each section.

Family members appear here

Using Add button to create the relationship...

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

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Menu Desktop Event Admin Actions Log off Search

Children's Centre Session Schedule Search Trump, David (75) Trump, Sarah (78)

Trump, David (75) DOB:15/10/2020

Person Profile Family Maintenance Running Record

Group by Surname

Trump 5

- (M) Trump, David (75)
dob: 15/10/2020
address:
postcode:
address from:
- (M) Trump, Donald (76)
dob: 05/02/1986
address:
postcode:
address from:
- (F) Trump, Halima (77)
dob: 02/02/2021
address:
postcode:
address from:
- (M) Trump, Mick (80)
dob: 24/02/1980
address:
postcode:
address from:
- (F) Trump, Sarah (78)
dob: 12/02/1986
address:
postcode:
address from:

+ Add Address Contact Details Family Group

1 person has no relationships set up

(M) Trump, Mick (80)
dob: 24/02/1980
address:
postcode:
Telephone Number:
Current Groups:

No family relationships currently exist for this person.
To add some, click add against the relevant section.

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

Steps to creating the relationship

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

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

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

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

For further help and guidance click the Synergy Resources link

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