Family Children Centre Training Guide
Level 1

Hackney Education

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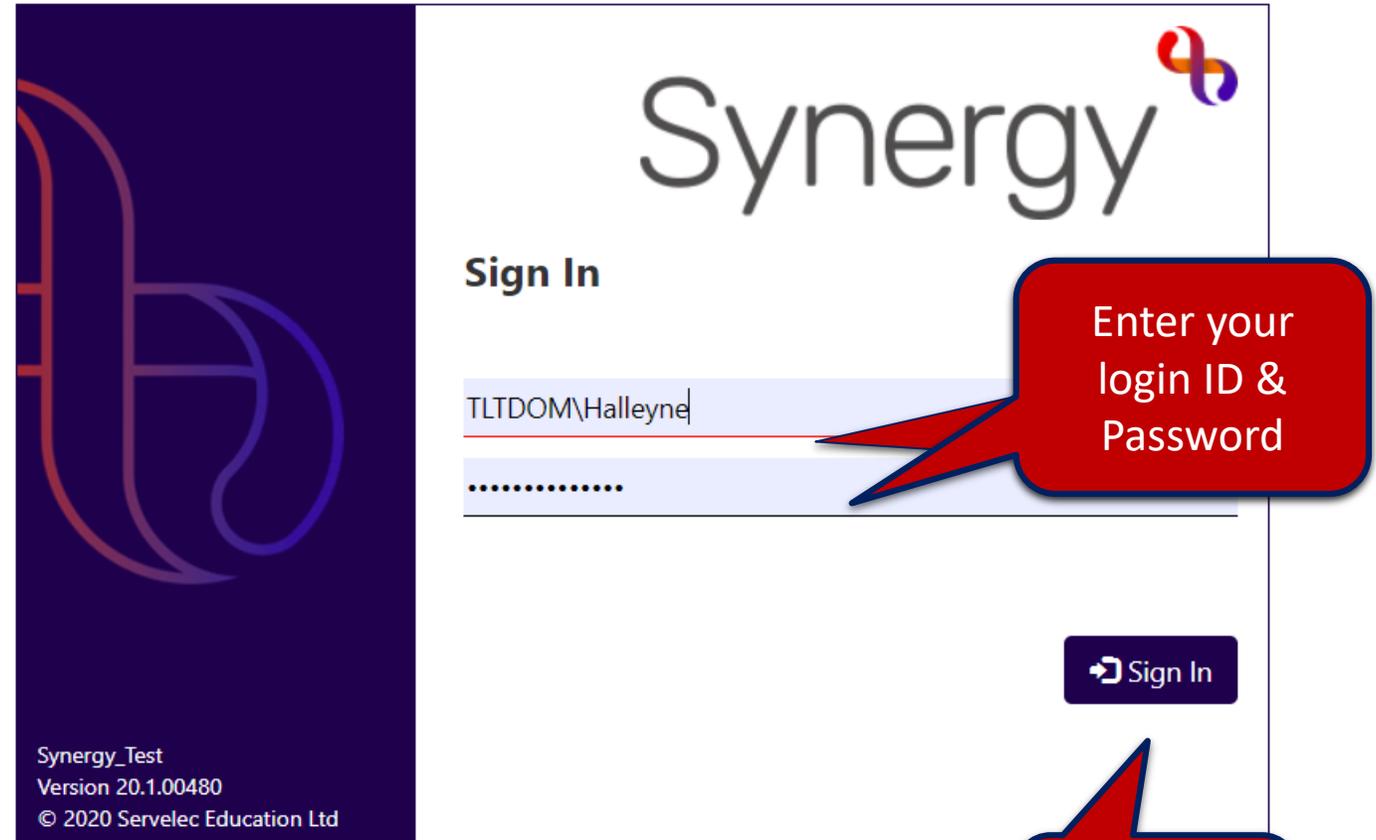
To get started with this module follow the steps outlined in this training guide.

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

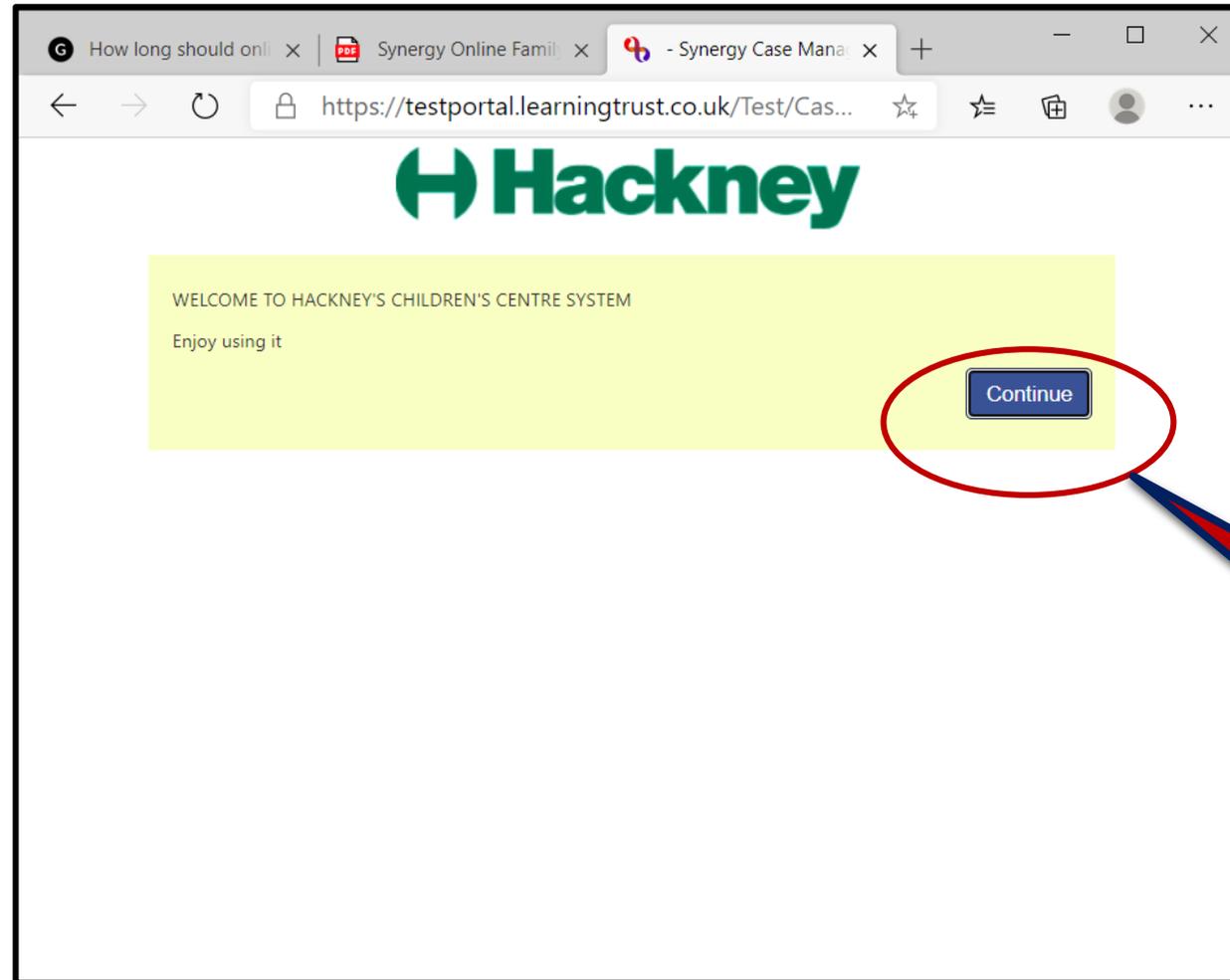- From the Synergy Sign In screen type your login ID and password, proceed to click the **Sign In** button.

Synergy Sign in screen

Getting started continued

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

Click here 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:

Additional menu items

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
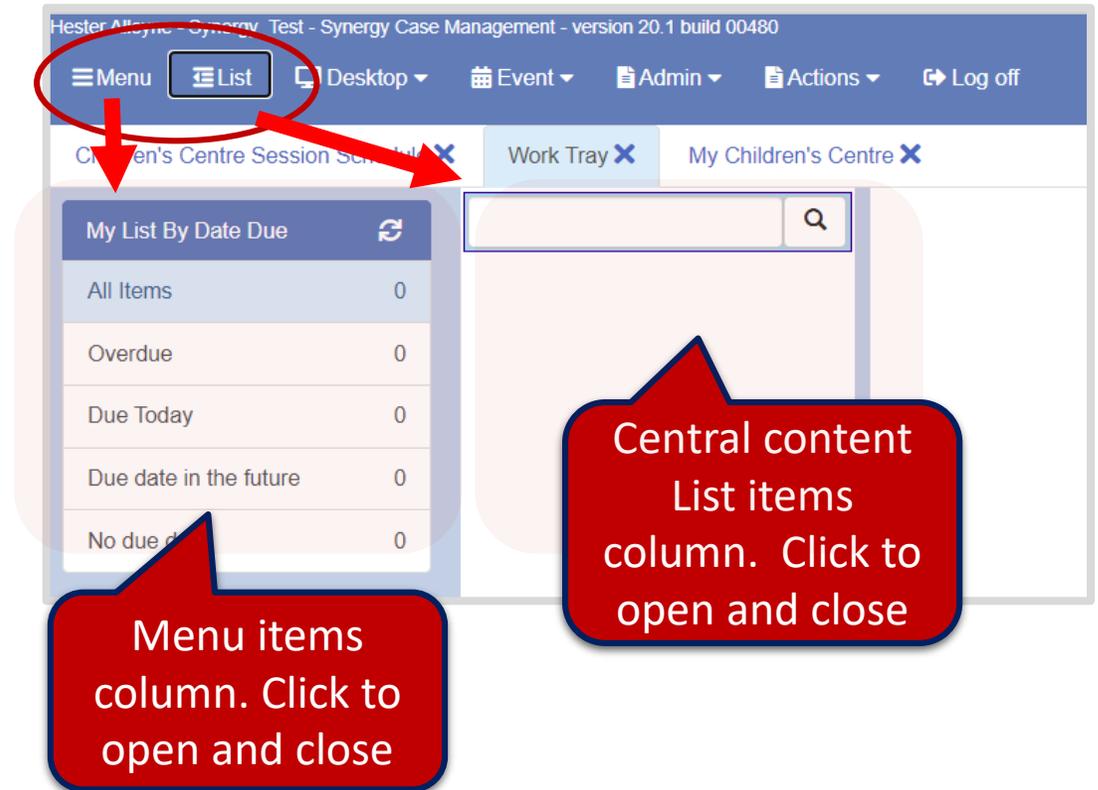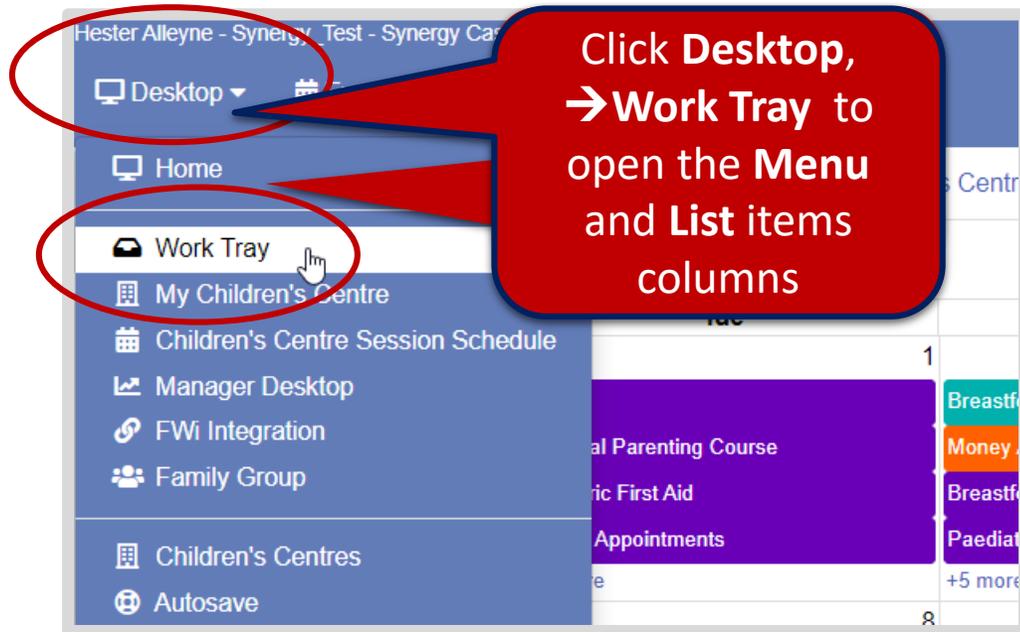
Recent History

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.

Click **Desktop**, →**Work Tray** to open the **Menu** and **List** items columns

Central content List items column. Click to open and close

Menu items column. Click to open and close

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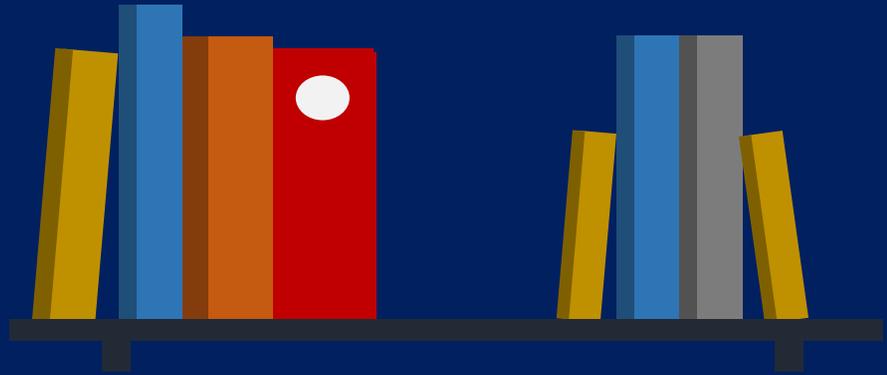
2. Setting Preferences

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**.
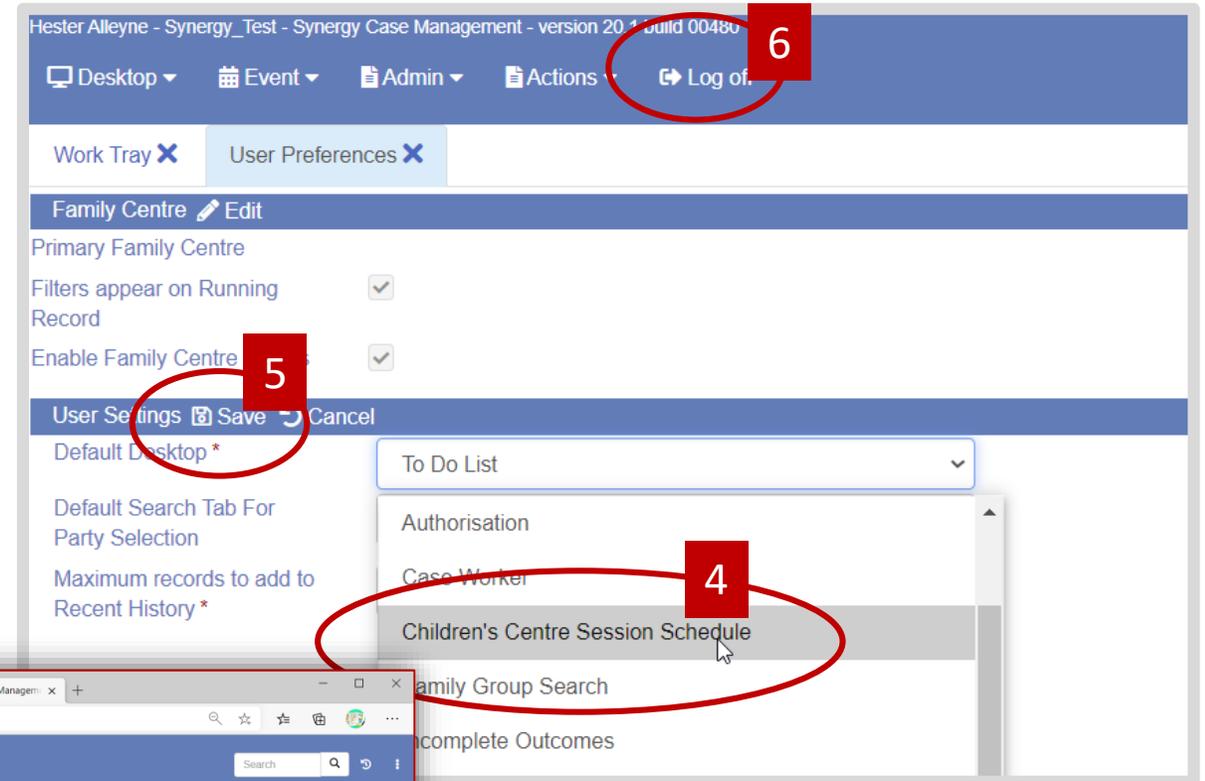
Setting Preferences - continued

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.

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.

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.

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.
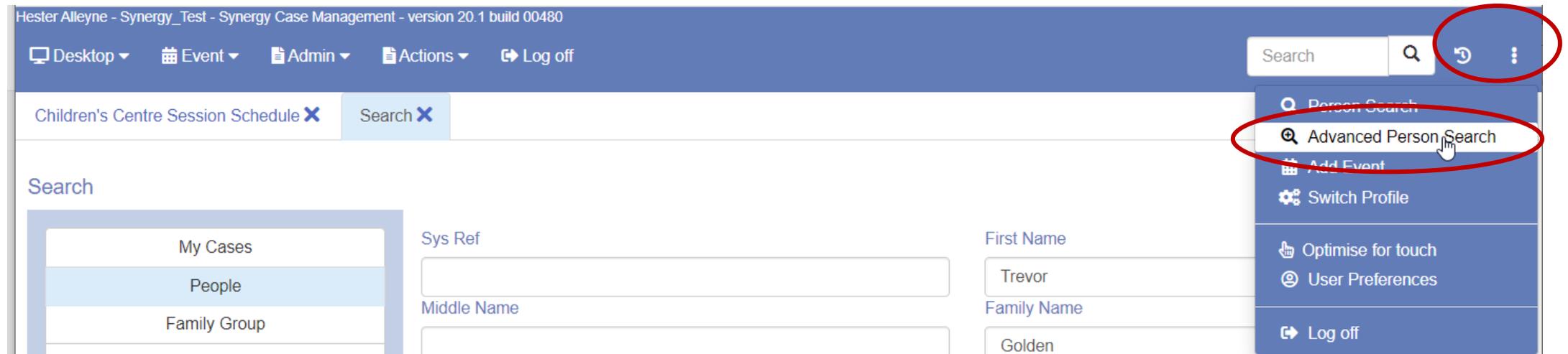

STEP B – USE THE SEARCH SCREEN AND COMPLETE MULTIPLE FIELDS

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.**

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.

Important…

Do <u>not</u> 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.

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.
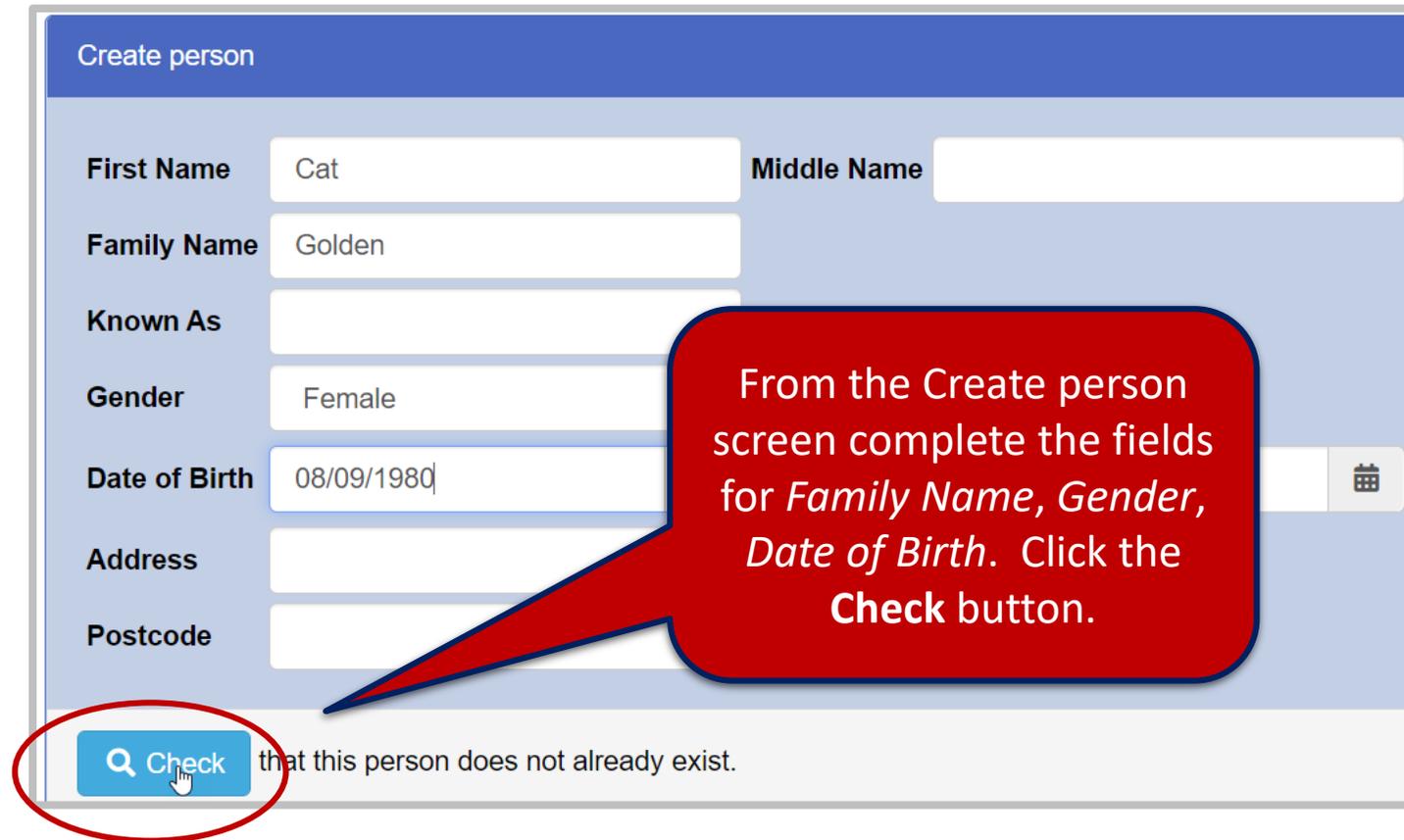
Create person

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

Q Check that this person does not already exist.

From the Create person screen complete the fields for *Family Name, Gender, Date of Birth*. Click the **Check** button.

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.

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 <u>not</u> 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 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.

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.

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.

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.

C. Click to create a relationship

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

Creating a Relationship continued

- The screen updates to display several relationship panel;, *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.

Creating a Relationship continued

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

The screen updates with the **Add new relationship** panel

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

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.

A. Select the Children panel

B. The screen is now updated showing the relationship link in the Current Partner panel

C. To add any siblings locate the Children panel and click **+add**

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.

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.

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.

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.

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 | **1** | e1 3ad

House Number/Name

Flat Number/Organisation Name

Street

Town

2

🔍 Search   ✕ Clear

➕ Create Unknown Address

3

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

4   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.
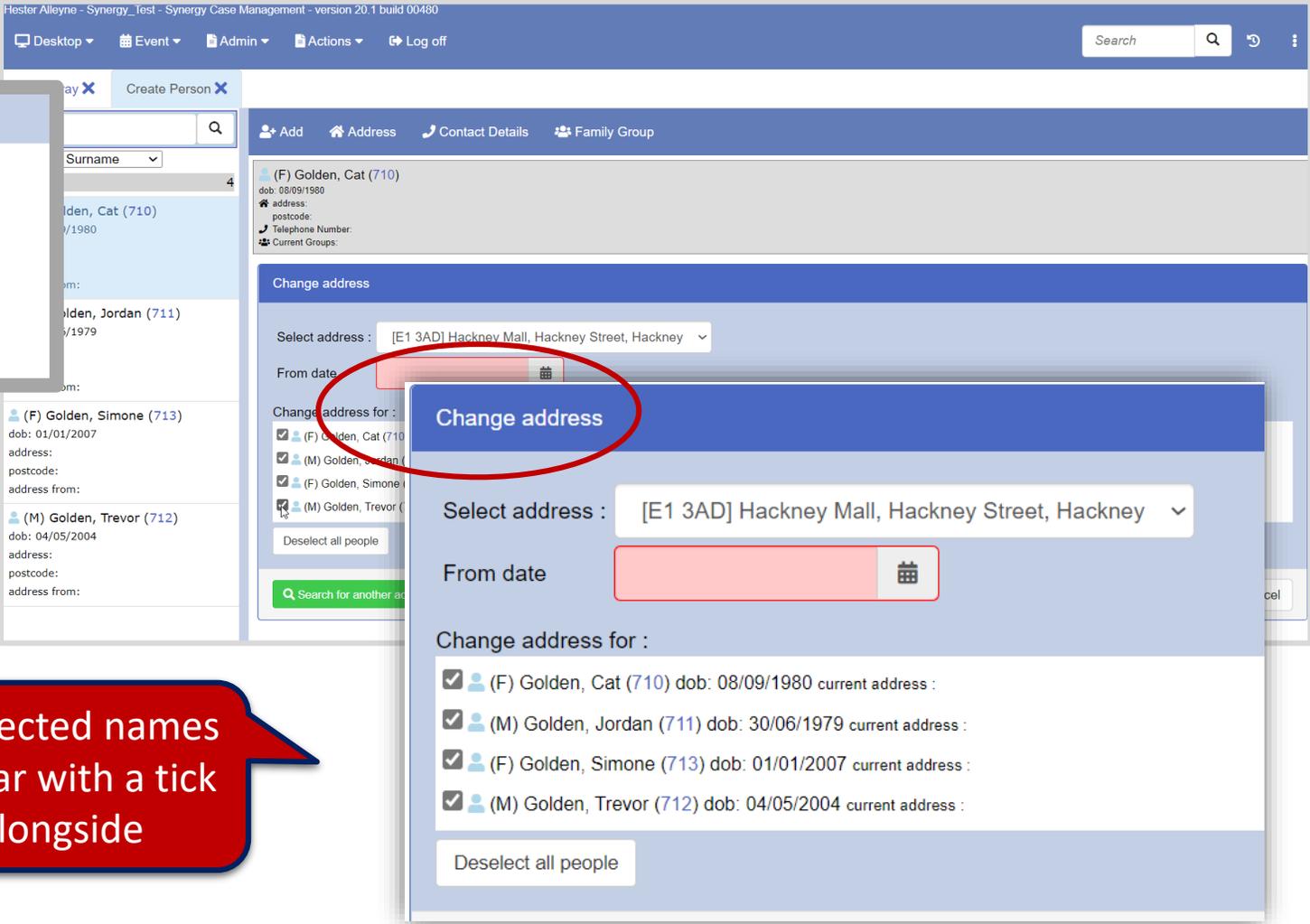
A. Click each family member check box to select all names

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 from was completed. Then click the **Change** button.

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

Click the **Change** button

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

The family are now connected to an address:

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).
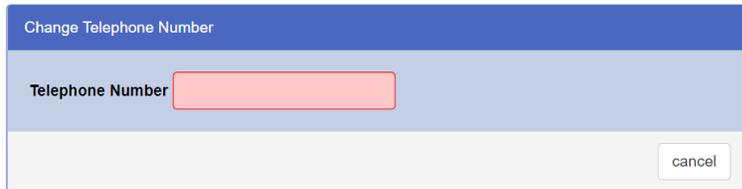
- Click the button lower right **Create New Number.**

- Assign the landline number to the family by clicking the check boxes alongside each family member name.

Selected family names

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

Add Contact details

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

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.

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.

Type a mobile number then click the Create New Number button

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

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.

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.

Click check boxes to select all members
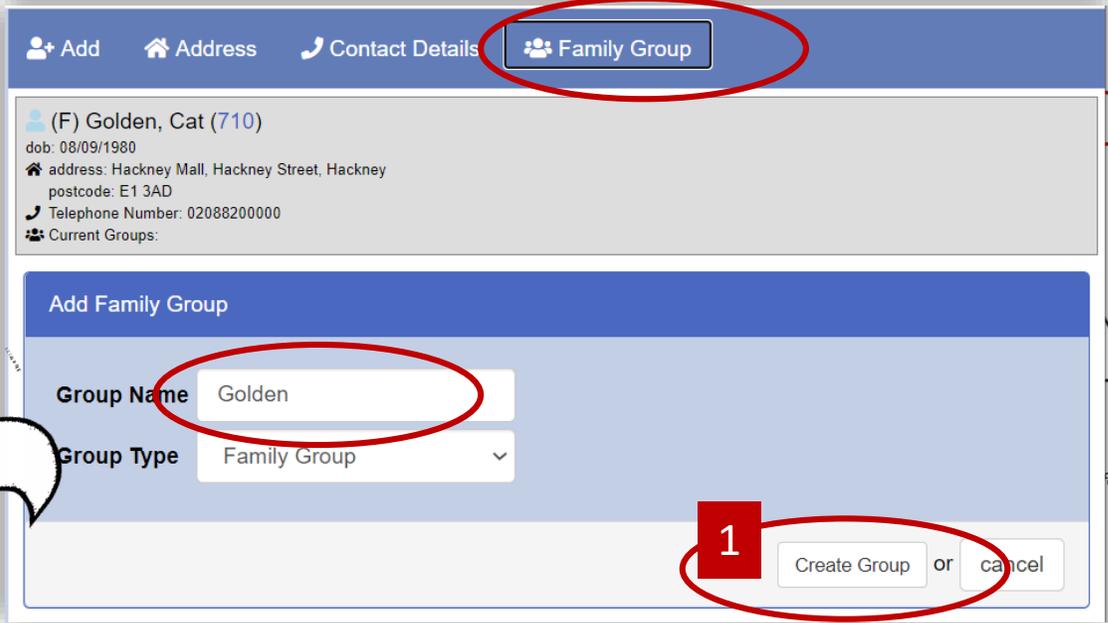
- The family are now added to a family group. To check click the **Family Group** button and click the drop own arrow alongside the **Add to Group** field.

- 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
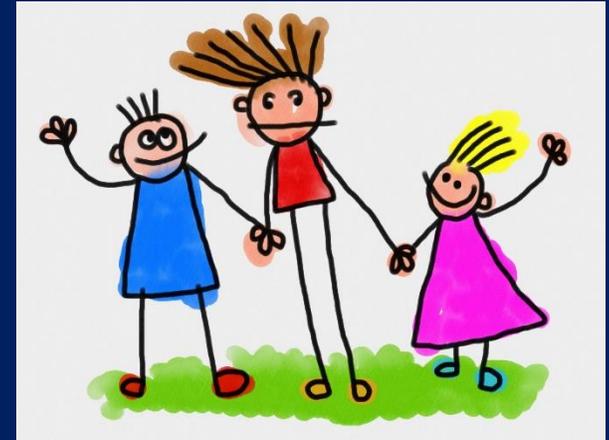
Add Children's Centre Registration Form

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.**
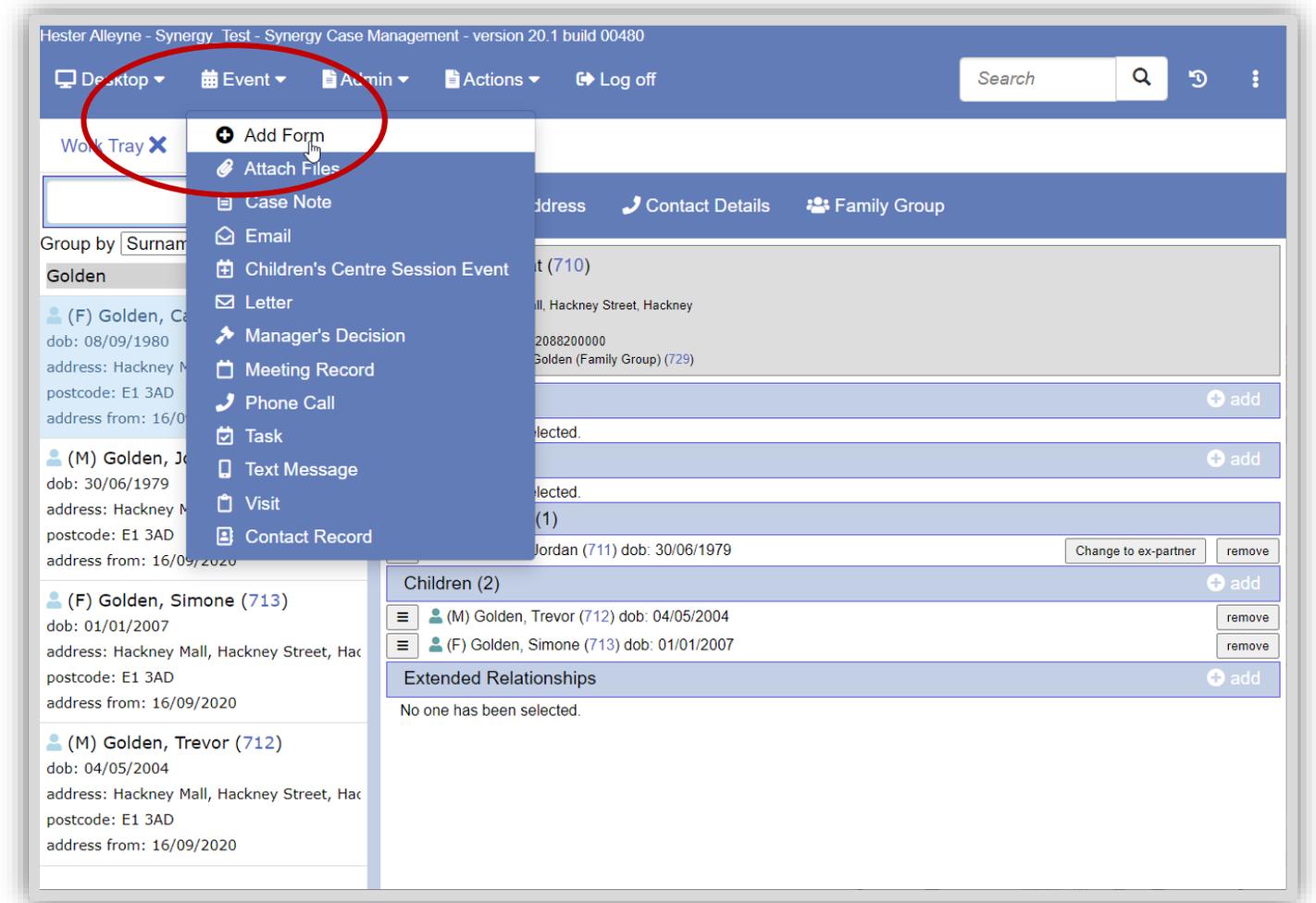
Registering a Family at a Children's Centre - continued

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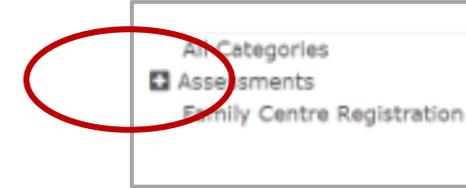
1. Click the plus sign which now shows a minus to expand the entry

2. Click the option Family Centre Registration

3. Click to select the form entry. Click Next

Select Template

Search..

All Categories
☐ Assessments
   Review
   Family Centre Registration

CCREG   Doc Ref: Hackney Children's Centres Registration Form/1   *Published - Jun 05, 2020*

Hackney Children's Centres Registration Form

Number of forms: 1

Preview   Dismiss   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.
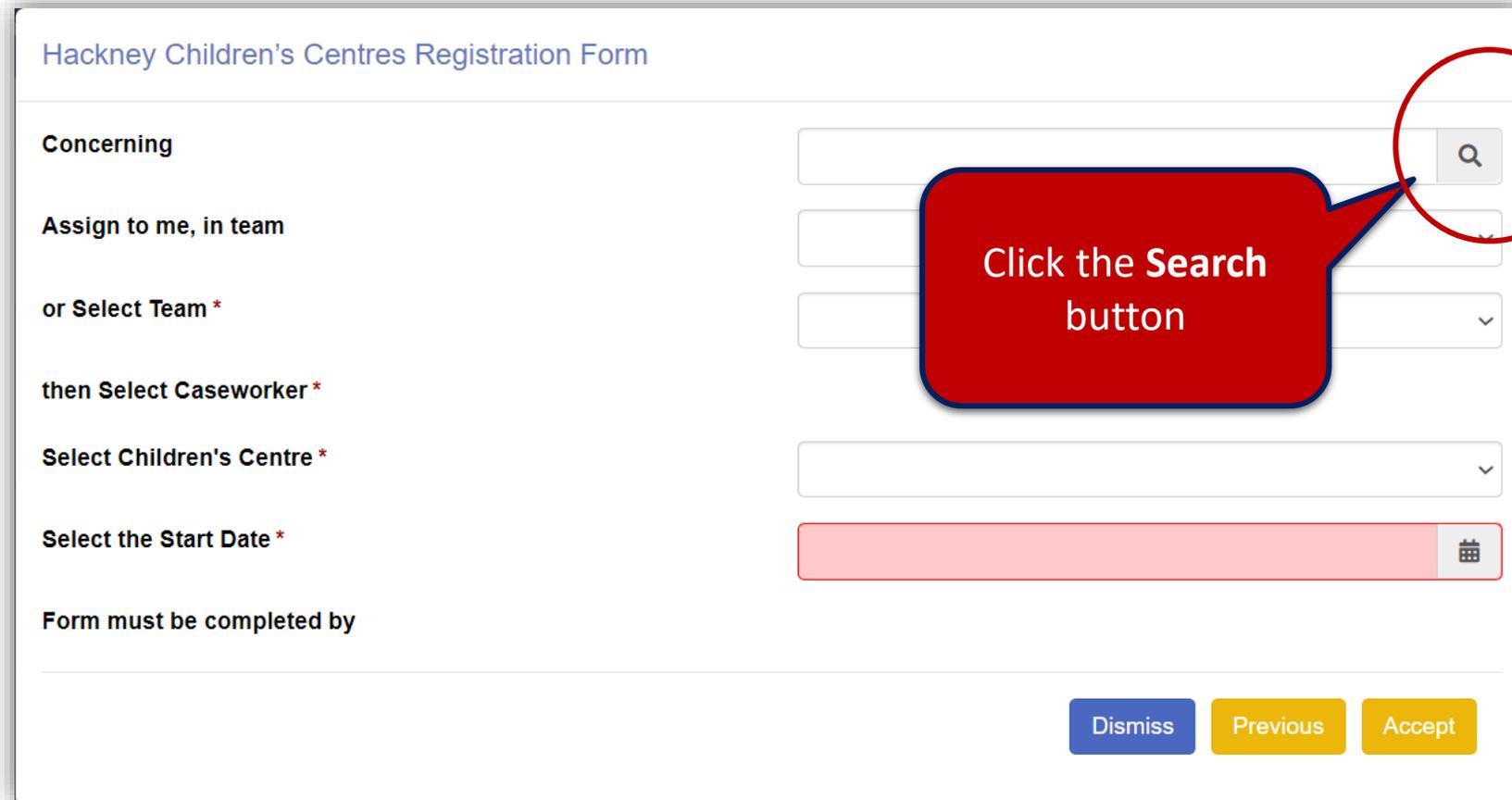
Registering a Family at a Children's Centre - continued

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.

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.

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.

Hackney Children's Centres Registration Form

Concerning	Golden, Cat (710) ✖ Golden, Jordan (711) ✖ Golden, Trevor (712) ✖ Golden, Simone (713) ✖
Assign to me, in team	Data Monitoring Officers
or Select Team *	Data Monitoring Officers
then Select Caseworker *	Alleyne, Hester
Select Children's Centre *	Ann Tayler Children's Centre(F)
Select the Start Date *	25/09/2020 00:00
Form must be completed by	30/09/2020

Dismiss   Previous   Accept

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**.

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

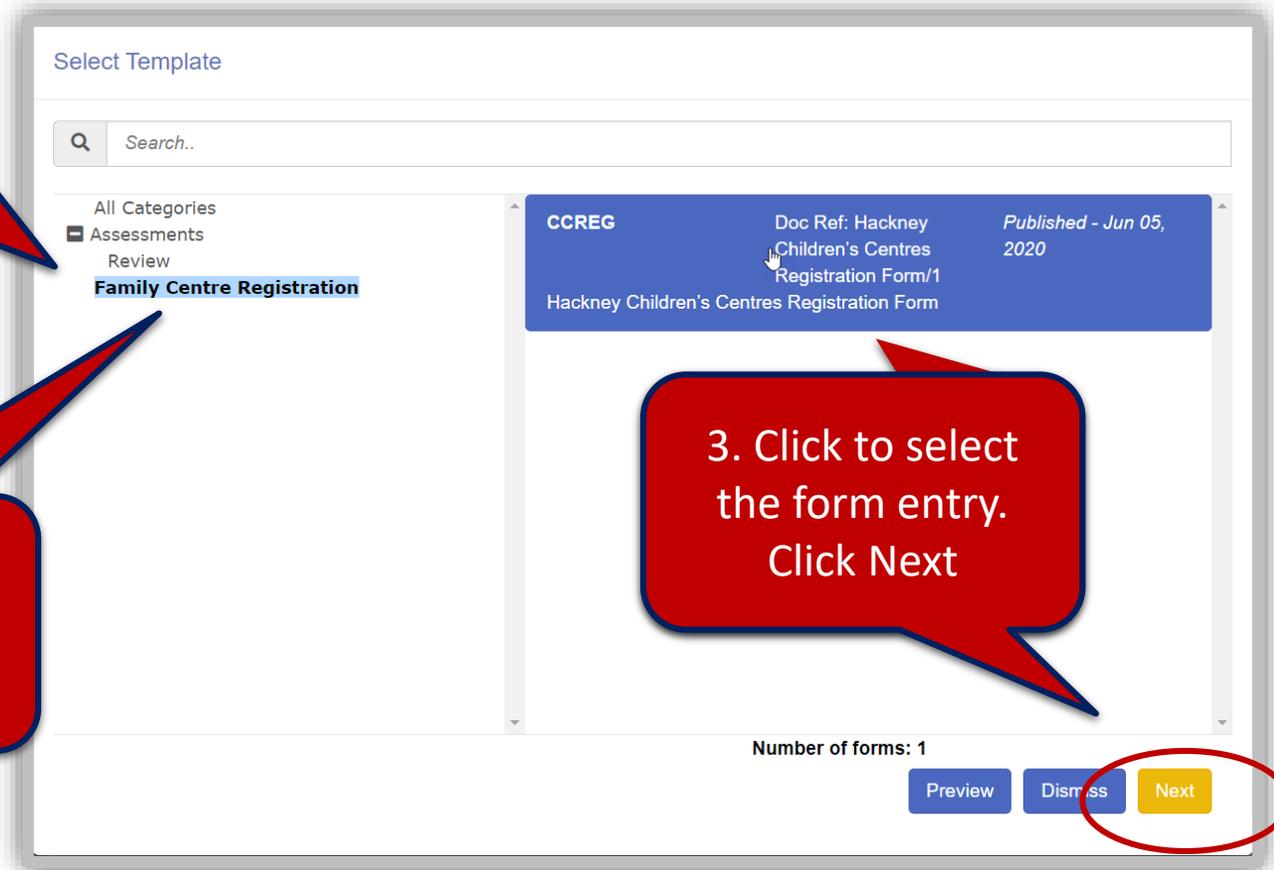- The Loading screen appears followed by the completion screen.

Registering a Family at a Children's Centre - continued

Registration Form and workbook information needed for the Registration Form Process

Registration Form

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

Add Family Group – When working with panels it is always best practice to complete panels individually for each member and save data for each panel.

Panel No. /Title	Description
3	Personal details
5	Addresses
6	Contact Details and Responsibilities
7	Contact
9	Personal Information
8	Employment Status
10	Benefits
11	Priority or Excluded Groups
12	Disabilities
13	Ethnicity
Pregnancy Details	
Additional Needs	
16	Professional Involvement

Panel No./Title	Description
17	New Family Centre Registration
Next Steps	APPROVE REGISTRATION

There are various panels and not all need to be completed.
However, the *Next Steps Approve Registration* must be completed for this form.

Registering a Family at a Children's Centre - continued

Children's Centre Registration Form continued

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

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.*

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 🖉 Edit													🔻 Filter ⊖	
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	✔	16/09/2020		☐	☐	Morningside Children's Centre(F)	Hackney				

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

Person > Addresses 5 - Trevor Golden 💾 Save 🔄 Cancel ➕ Add Row													🔻 Filter ⊖	
	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	✔	16/09/2020		☐	☐	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.*

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

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

Person > Contact Details and Responsibilities 6 - Jordan Golden	🖫 Save	🖍 Cancel	➕ Add Row

	Main contact	Contact details	Contact type	Main Telephone Number	
	☐	02088200000	Phone	☐	
	☐	07841234556	Phone	✔	
🔍	☐	jordan.golden@jgjg.con	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.

REMEMEBER: 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 OUTINED ON THE REGISRATION FORM, BU IT IS IMPORTANT TO COMPLETE ALL PANELS WHERE POSSIBLE BEFORE APPROVAL.

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.

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**.
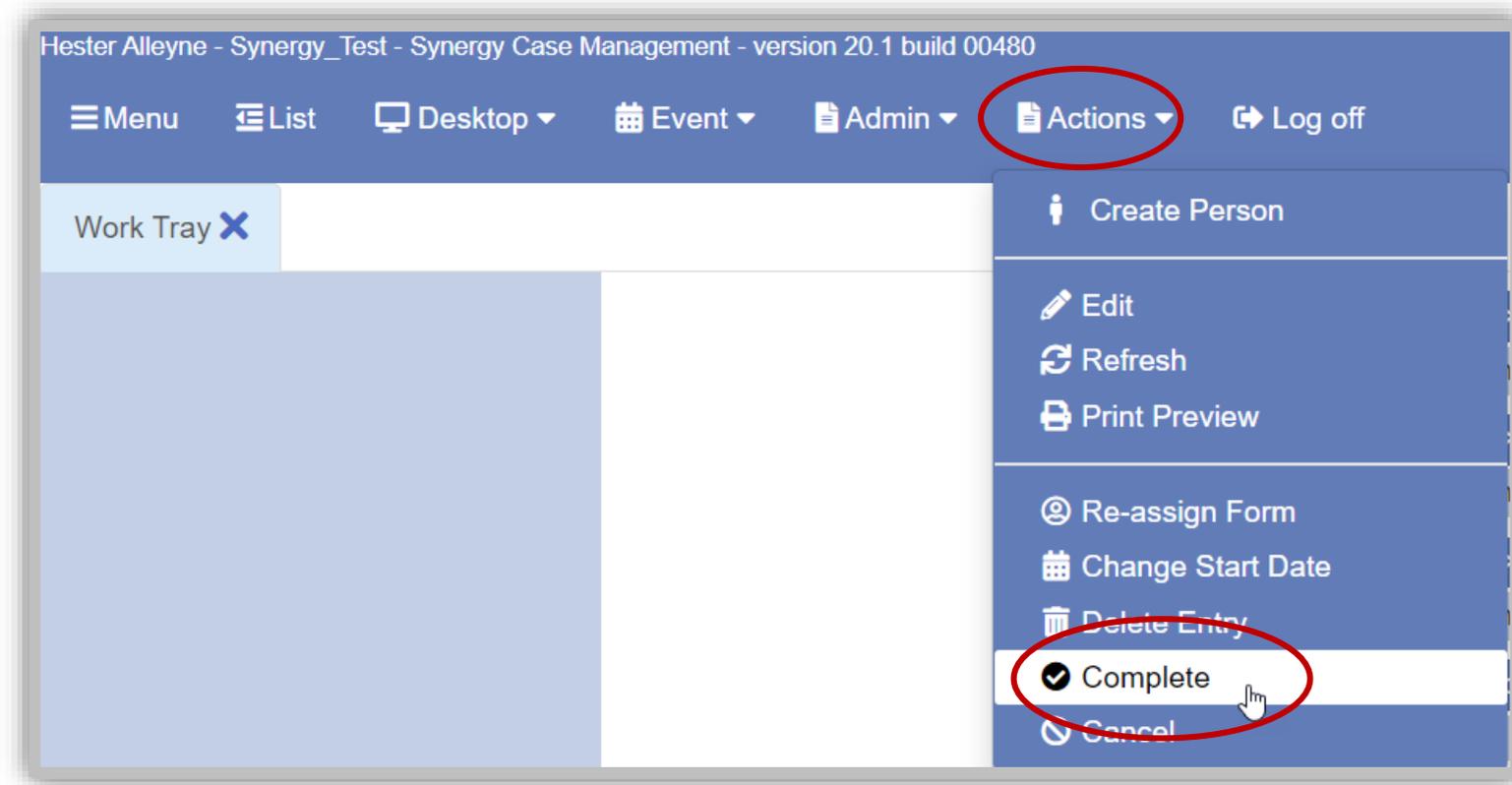
Registering a Family at a Children's Centre - continued

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

The family should now be **successfully** registered at the Children's Centre!!!

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.

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

Adding Activities continued

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

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:

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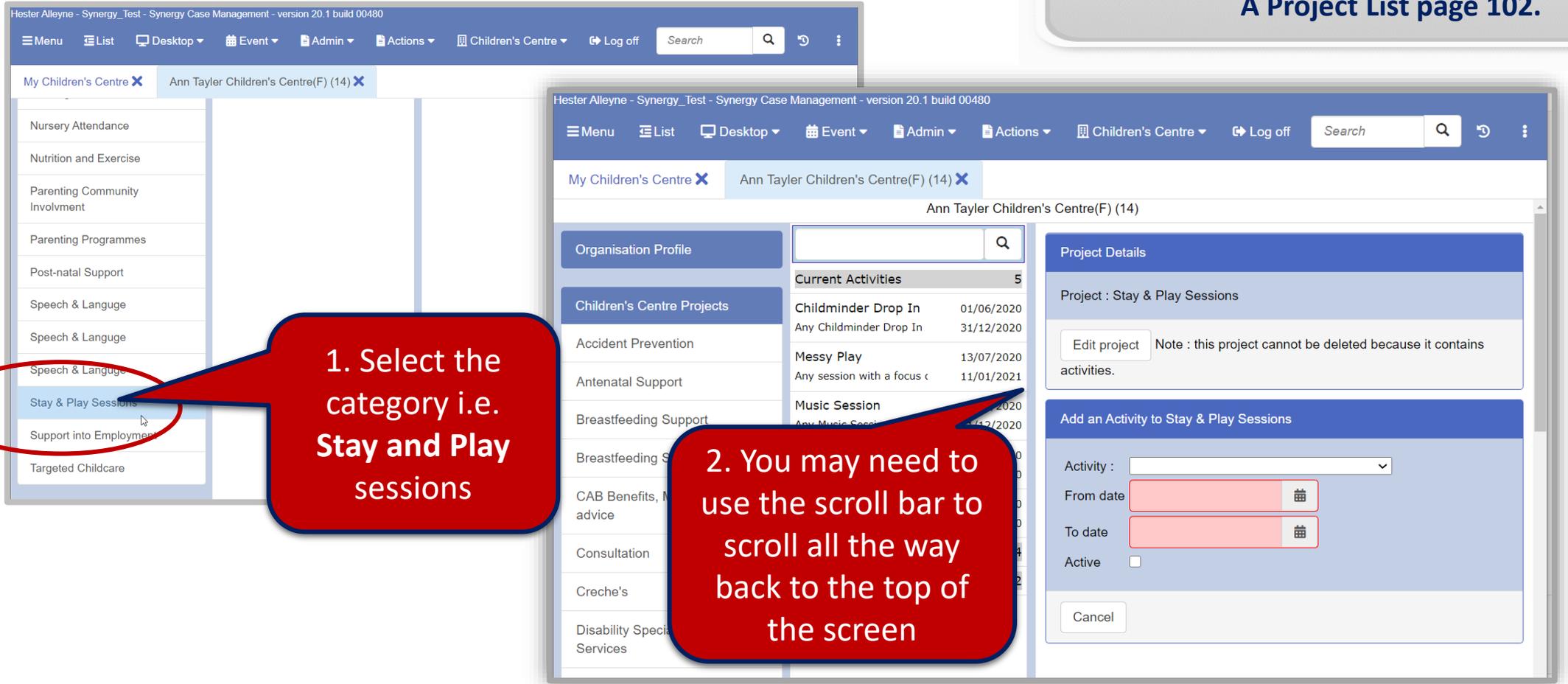
1. Select the category i.e. **Stay and Play** sessions

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

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.

Project Details

Project : Stay & Play Sessions

Edit project   Note : this project cannot be deleted because it contains activities.

Add an Activity to Stay & Play Sessions

Activity :   Music Session

From date   10/10/2020

To date   01/12/2020

Active   ☑

Add activity

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**

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.

Complete the relevant fields then click the **Save** button

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

Any Music Session

Session Details 🖫 Save ↺ Cancel

| Adult Capacity | 10 | Child Capacity | 10 |

| Total Capacity | 20 | Sessions are exclusive | ☐ |
| Location * | Anne Taylers Childrer ⌄ | Chargeable | ☑ |

Public

| Public | ☑ | 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

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

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.

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	☐
Location *	Anne Taylers Children Centre, Cafe Area	Chargeable	☑

Public

| Public | ☑ | ...sic with Jemima |
| Category | | |

Notes

Activity Work..rs 💾 Save ↺ ..ancel ➕ Add Row   ▼ Filter ⊖

	Person
☐	Hutton, Biddy (393) ⌄
☐	Adesanya, Ibukun (16)

Session Waiting List ✏ Edit   ▼ Filter ⊖

Priority Order	Person	Date Of Birth	Date Added

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

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

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.*
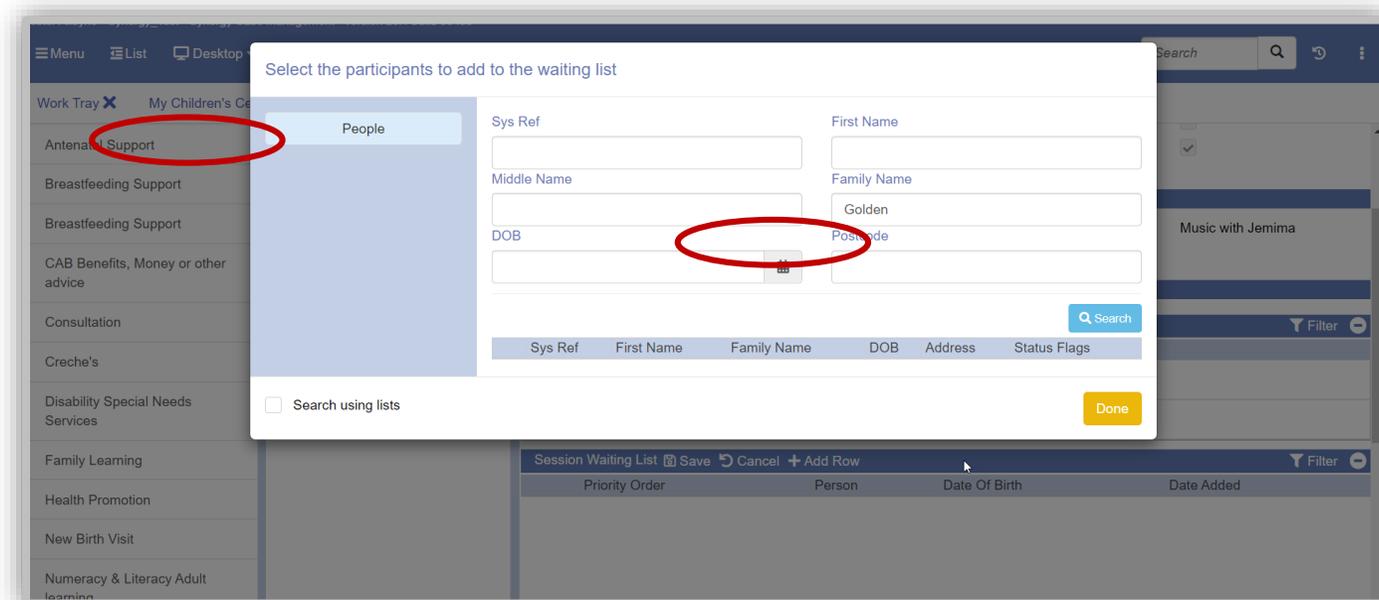
Typical standard Search screen

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.

- <u>Note</u> **Repeat the Search for each member you wish to add to the waiting list.**

- When you have completed the above steps click **Done.**

- <u>Optional</u>**:** 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**.

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.

Adding Activities continued

Adding dates:

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

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

Click to Add Dates

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.

Adding Activities continued

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

Adding Activities continued

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

Select a recurrence pattern; *Daily, Weekly* or *Monthly*

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.

Add Session Dates

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

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	

Remove any dates not required i.e. bank holidays, half term etc.

Click the **Create Dates** button

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.

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.

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.

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.**

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**.

Select the participants to add to this session

My Cases
People
Carers
Professionals

Ensure People are selected

Use relevant fields to conduct your search

Click to select members

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) ✖   Baggio, Calvin (697) ✖   Baggio, Kelvin (699) ✖
Baggio, Candy (701) ✖

Done

Booking or Adding Attendees to Sessions continued

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

Booking or Adding Attendees to Sessions continued

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

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.

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.

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.

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.

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.

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*.

Appendix A.
Project Type & Activities

Project Type & Activities Listing

Project List

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 no 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.

D.

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