# Synergy Support Guide

Version 1 – February 2021

Early Help Transformation Team

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URL:

https://eisi.medway.gov.uk/EISi/Website/Account/Login?ReturnUrl=%2FEISi%2FWebsite%2F

Early Help in Medway

# Contents

# Early Help Training - Hands-On With Synergy

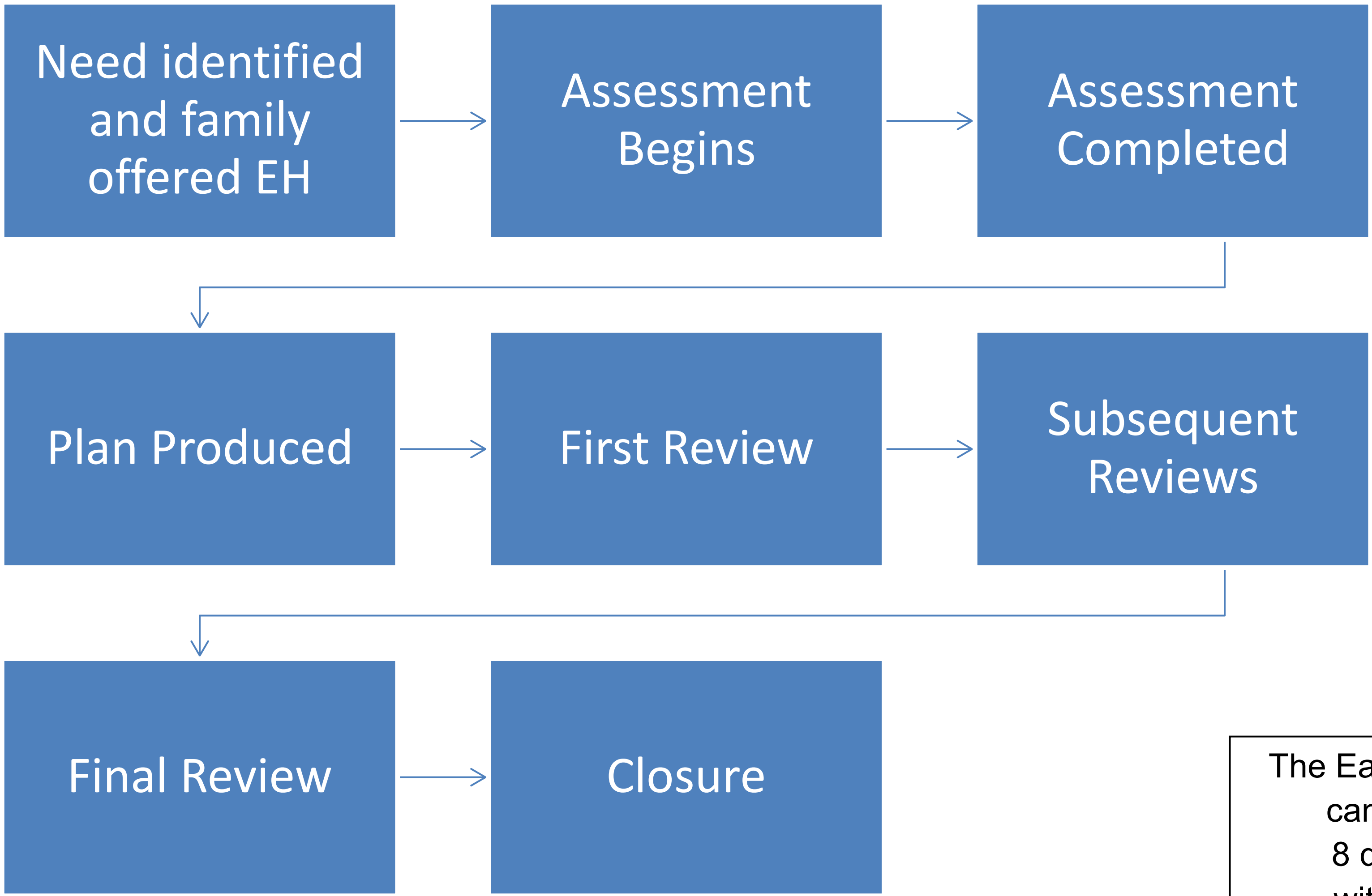
- This booklet will help you navigate through some of the functions within the Synergy (EISi) system
- You can see a series of tasks

➢ This symbol indicates the next task for you to complete.

🖱 This symbol requires you to left click the mouse.

*This booklet is yours to aid your learning.  Please make as many notes as possible that you need on here.*

*Flow Chart for the Early Help Process*




The Early Help process can be split into 8 distinct steps within Synergy

# Task 1 - Logging On To Synergy

To log on to Synergy please open your web browser (Google Chrome recommended) and enter the following URL.

https://eisi.medway.gov.uk/EISi/Website/Account/Login?ReturnUrl=%2FEISi%2FWebsite%2F

Once the synergy log-on screen appears (fig 1) please enter your log-on details.

➢ Please log into the system now.


Fig 1

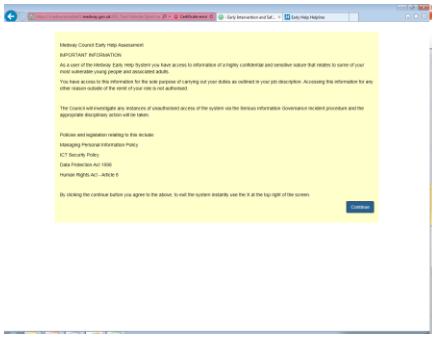


Fig 2

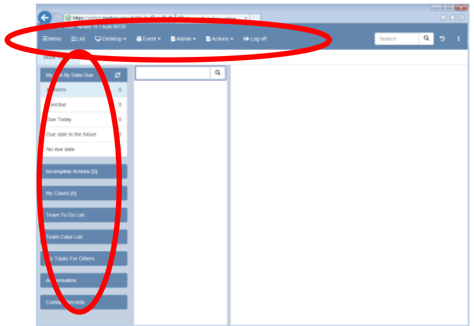
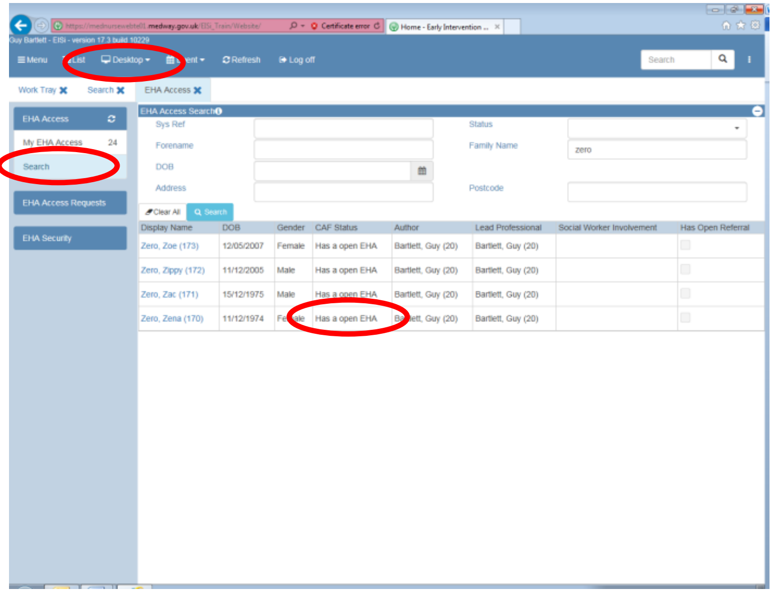


Fig 3

If your details are accepted, you will be presented with the splash screen (fig 2). After clicking continue you will be taken to the default desktop screen. The Ribbon Bar is at the top, the Work Tray is to the left. (fig 3)

***Hint / Tip……. You may wish to save the Synergy URL as a favourite to allow you to quickly access it in the future.***

## Task 2 - Searching the System for a Current EHA




To search the system to see if an Early Help Assessment (EHA) is already in place we need to follow this process.

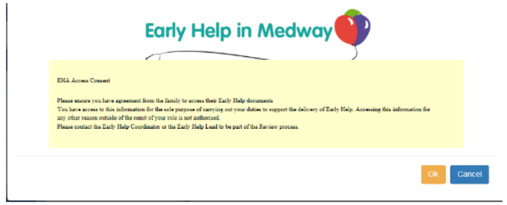
- 🖱 Desktop (in the Ribbon Bar)
- 🖱 EHA Access (note the EHA Access Consent (Fig 4a) and click ok)
- 🖱 Search (left most column)

Fig 4

You can see there are a range of criteria we can use to search on.

> ***Hint / Tip……..***
> Individuals stored on the system have a unique reference number shown next to their names. Many Synergy users find it easier to use this number rather than typing names each time.

Fig 4a




When searching for information within Synergy please be aware that you can search on partial names in the top right search box. For example, a search on “App” will provide all results of any family whose name begins with “App”. You can also use the % wildcard. For example, App% would give all results for records starting with App (Apple, Apps, Appleby etc)

- Please search for the family name in the search box. Then 🖱 on the search magnifying glass inside the blue button.

You may see the family “Has an open EHA” and the author of this is Guy Bartlett (Fig 4).

# Task 3 - Viewing a Current EHA

If an EHA has been started for a family the EHA Status box will display “Has an open EHA”.

To view that EHA 🖱 on the person’s name. Providing you have the relevant access level; you will be able to view this document.

Let’s try this now.

If your search on the family shows that they have an open EHA.(fig 5)

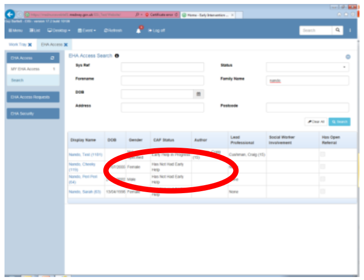


*Fig 5*

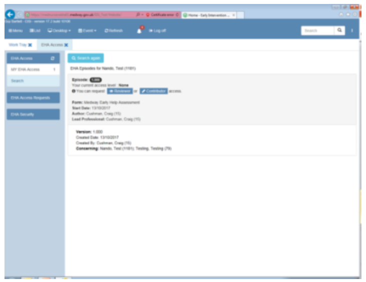


*Fig 6*

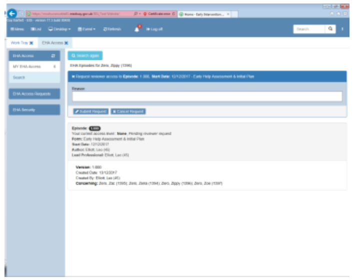


*Fig 7*

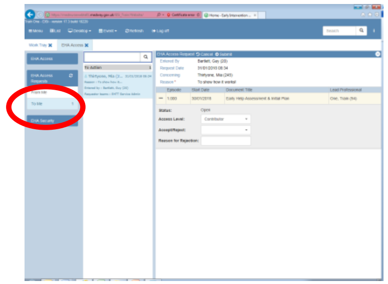


*Fig 8*

- If we 🖱 on one of the family members, this brings up a screen asking if we would like to be a reviewer or a contributor (Fig 6).

You need to request access as a reviewer or a contributor from the author of the document. (Fig 7)

***Hint / Tip……..Each time a contributor amends a form a new version of that form will appear. This makes it possible to see the changes that have been made.***

## Task 4 - Starting a New EHA

If an EHA has been started for a family the EHA Status box will display “Has an open EHA”. To view that EHA 🖱 on the person’s name and, providing you have the relevant access level, you will be able to view this document. (fig 9)

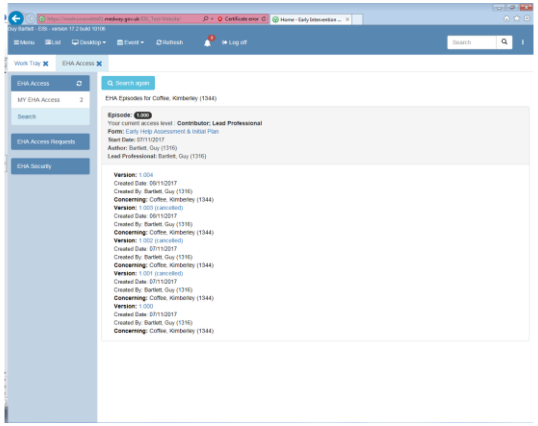


*Fig 9*

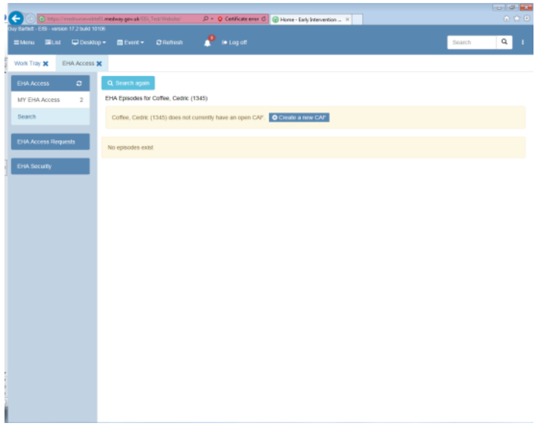


*Fig 10*

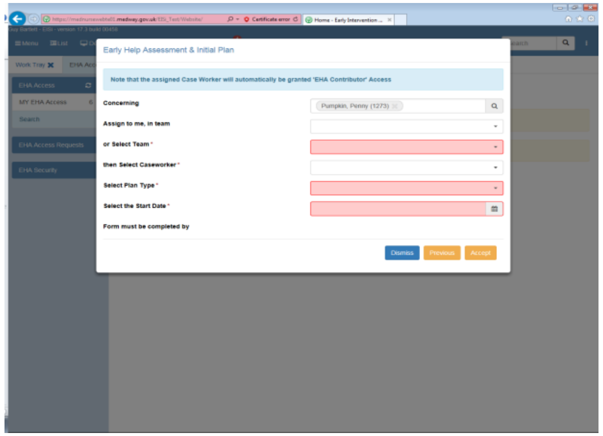


*Fig 11*

***Hint / Tip……. The latest version of the document is always the top one.***

If there is no Early Help in progress click on the person’s name who you want to start the EHA on. You will be asked if you’d like to create a new EHA (fig 10)

To create a new EHA 🖱 Create a New EHA box. You will then be asked to select the appropriate template.
🖱 “CAF Early Help Assessment & Initial Plan” then 🖱 next

- Create a new EHA for your family (EHA Access, Search for them, click on their name, create a new CAF, CAF template, next). (Fig 11). **Don’t press ACCEPT yet**

***Remember to search for the family name you were allocated.***

# Task 5 - Defining the family members for the EHA and selecting the plan type

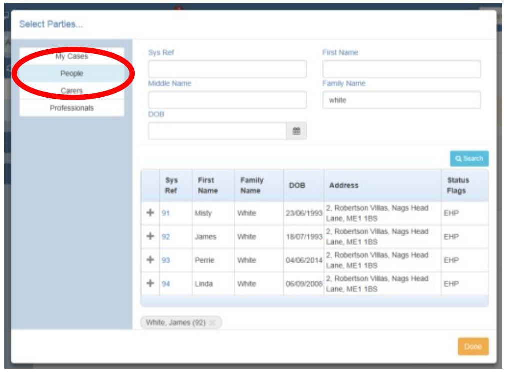



Fig 12

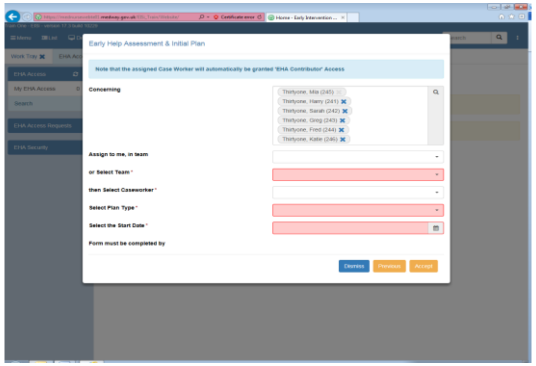


Fig 13

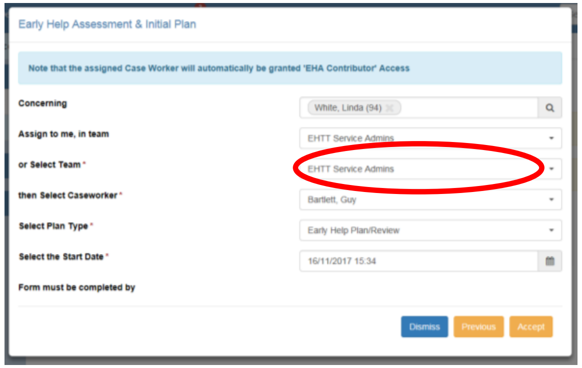



Fig 14

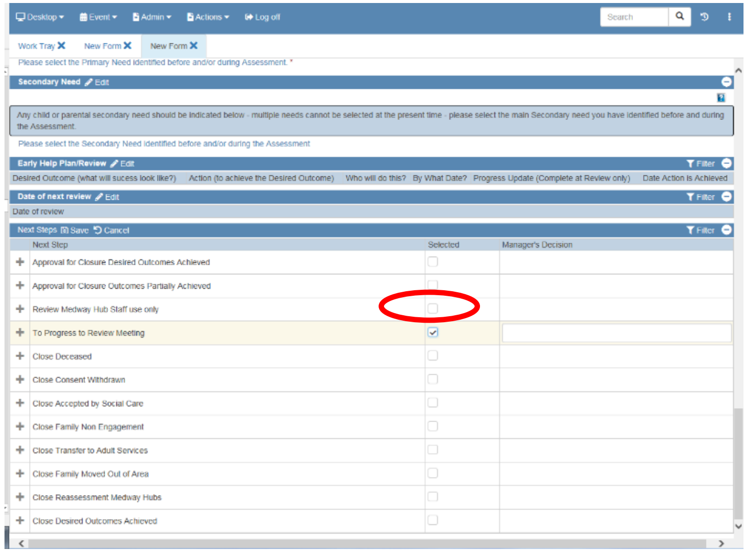
We need to add all the family members who will be associated with the EHA.

The system requires you to add all family members at this stage.
If you need to add them later you will need to start a new EHA and re-enter all the data.

- Use the magnifying glass to add all the relevant family members (fig 13).
- Then 🖰 the assign to me, in team drop down and choose your Team (fig 14).
- 🖰 the drop down for plan type and choose “Early Help Plan and Review”
- 🖰 The calendar and select the start date. If you want to add today’s date, simply double left-click the mouse in the red box.
- Once you are happy with all the information added then 🖰 accept. Synergy creates the new EHA and Initial Plan

***Hint / Tip……. When searching for individuals ensure you are searching in the “people” category (fig 11), or my cases if they are allocated.***

## Task 6 – Inputting Information on a new EHA




Once a new EHA has been created we need to populate it with data.
Go to Actions, in the Ribbon Bar, and choose edit. This opens the form allowing you to add or amend information. You may need to scroll back to the top.

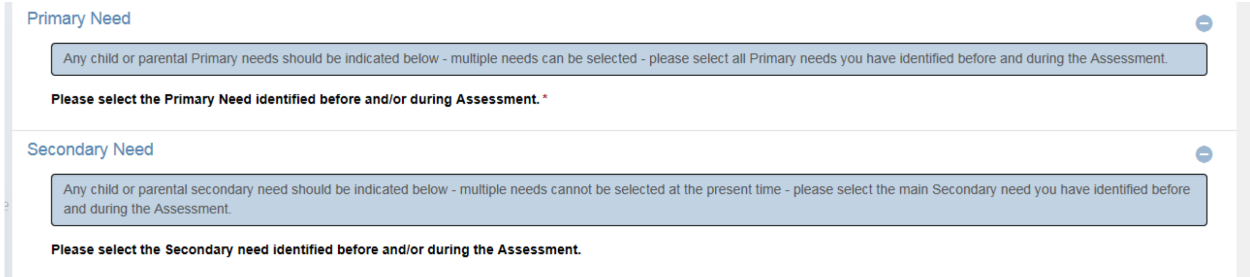
- In the "is this a step down" section
- Choose "no" from the drop down
- In the "Agreement to Early Help Process" section
- Add today's date and the name the of parent who agreed to EH
- In the "Reason for assessment" section, add "the reason the referral came in" and in the
  "What has been tried already" please add "any information from the referral and assessment gathering."
- In the Primary Need and Secondary Need drop down. Select from the drop-down options.

Fig 15

- In the Early Help Plan/Review section for each family member add row.
- Desired Outcome "Example - NAME… to have improved concentration in class on a regular basis"
- Action "NAME … to receive 1:1 support from the teaching assistant.", Who will do this "Class Teacher".
- Add a date one month from today.
- Leave the Progress Update and Date action achieved blank. (These are always left blank at the assessment/planning stage)
- Go to Next Steps and tick to select the "To progress to review" box on the right (fig 15)
- Ignore the managers decision box unless you have been specifically asked to populate this
- Fill in the Next Steps for each family member. We need to tick "To progress to review meeting" for all family members.

**Desired outcomes need to be SMART and each one needs a named person with responsibility for completing it.**

You need to complete as many of the EHA sections as possible. The majority of the sections are easy to understand and complete. Some sections have a blue box which will clarify what data is required to complete them. (For example, Primary Need and Secondary Need – Fig 16)



Primary Need

Any child or parental Primary needs should be indicated below - multiple needs can be selected - please select all Primary needs you have identified before and during the Assessment.

**Please select the Primary Need identified before and/or during Assessment.** *

Secondary Need

Any child or parental secondary need should be indicated below - multiple needs cannot be selected at the present time - please select the main Secondary need you have identified before and during the Assessment.

**Please select the Secondary need identified before and/or during the Assessment.**

Fig 16

Remember to add assessment information for each of the areas for <u>each</u> family member.

***You do not need to complete this form at one time. You can save your work at any time by ✍ save in the actions menu in the ribbon bar.***

Don't forget you must add all the family members that will be involved in the EHA at the start of the process. It is not possible to add them later unless a new EHA is produced.

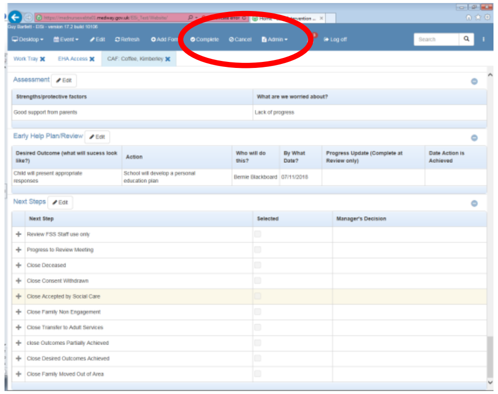


Fig 17

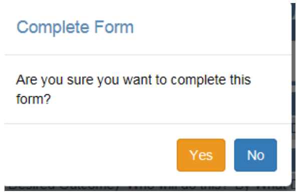



Fig 18

Do not complete until <u>all</u> information required for the EHA has been added and your manager, or appropriate colleague, has checked the form for quality assurance purposes (if appropriate) (Fig 17)

- on complete now. You will be asked to confirm you are happy to continue. (Fig 18)

If you have missed out a mandatory section this will be highlighted to you. (fig 19)

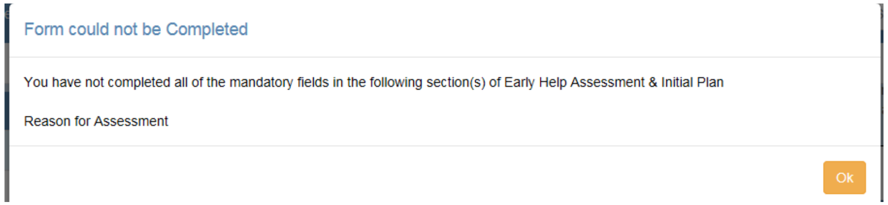



Fig 19

## Task 7 – Incomplete Actions

You have now completed your first Early Help Assessment and Plan. Well done!

Please return to the Work Tray, by clicking the Work Tray tab. Find the Incomplete actions box and click it (fig 20)

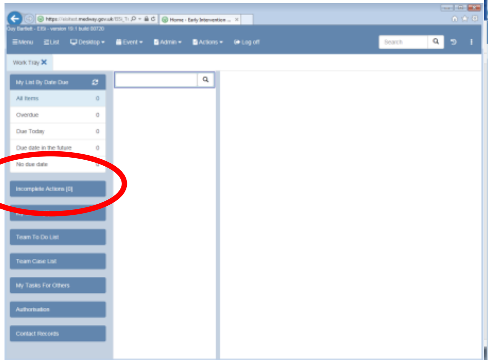


Fig 20

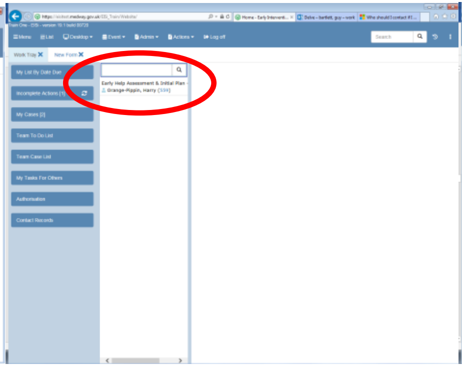


Fig 21

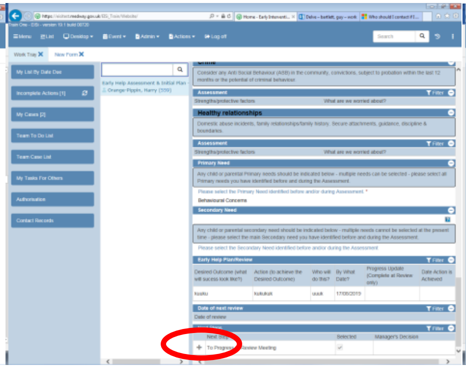


Fig 22

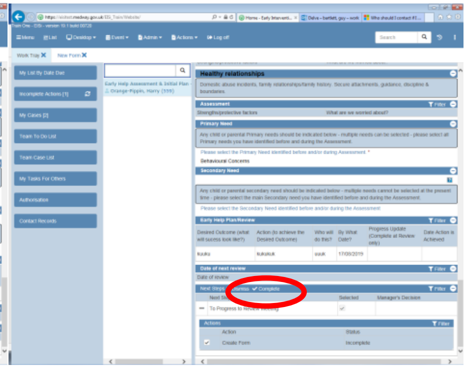


Fig 23

You will see the Early Help Assessment & Initial Plan appear in the middle column on screen. Click on this (be careful not to click on the system ref number) (fig 21)

The EHA opens in the preview pane on the right. Scroll to the bottom and click the + on the left of next steps and add a tick in the "create form" box (fig 22)

Press the complete button that now appears (Fig 23). Then tick select all, ok.

You are now taken to the Early Help Review Form creation page.

# Task 8 – The Review Form

After the assessment and plan have been produced, we need to review progress made towards the agreed outcomes. We do this at regular interviews (usually 6-8 weeks) and record our findings on the review form within Synergy.

To create a review form we go to the incomplete actions section of the work tray as shown on the previous page (fig 20).

Synergy automatically includes all the relevant family members (fig 24)

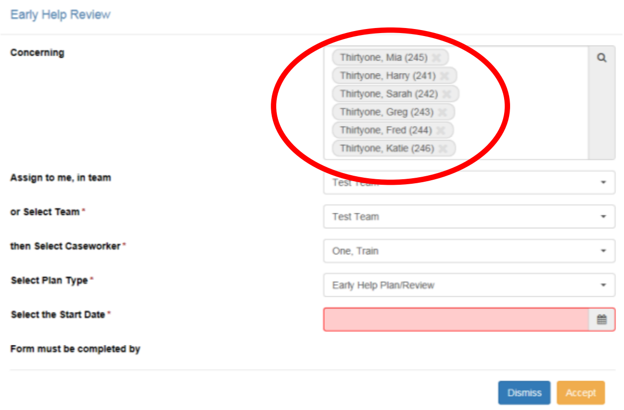



Fig 24

Populate the other boxes with the relevant information.

- Please assign it to “your team” and then select your number if it is not automatically populated for you.
- Select plan type as Early Help Plan / Review
- Select start date as a date around 5 weeks from today
- 🖰 on accept (fig 24 xx)
- 🖰 on ok when Synergy informs you the form has been successfully added

You have now created the Early Help Review form for the family.

The review date must always be at least 1 day **after** the assessment date

## Task 9 – Completing the Review Form

Each section of the review form which has an asterisk or is a red box needs to be completed as it is a mandatory field.

Before we can populate the review, we need to fill in each mandatory section of the review document - as well as other sections - if relevant. As time is limited, we will only fill in this form with minimal data. In reality we would undoubtedly complete the fields in a more detailed manner.

- ➢ Press actions/edit in the ribbon bar and then type "N" in each of the sections from:

At risk of Child Sexual Exploitation to

Healthy relationships, professional concerns (14 red boxes)

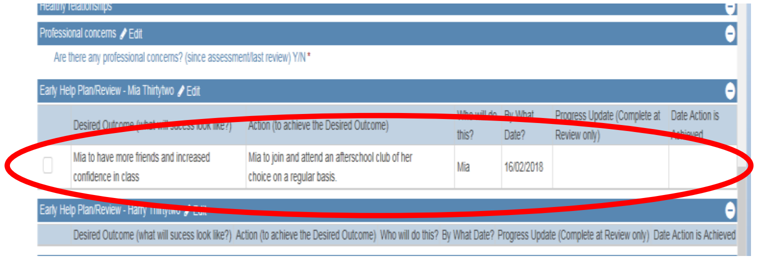



Fig 25

You will now notice that the outcomes which were added in the assessment stage has now pulled through. (fig 25)

You need to update everything that has been done. In progress update let's type "no progress", if this is the situation. As the action hasn't been achieved yet we leave the date box empty.

We now need to complete the progress since last review. The Early Help Lead, working together with the family, agrees on the level of progress since the last review.

- ➢ Click Edit and select "no progress" from the drop down.
- ➢ Finally, add the date of next review, go to next steps and select "To progress to review meeting".
- ➢ The next steps need to be completed for all family members. Once done, save and complete. Remember, we would only complete once the team leader or manager has QA-ed the document (if appropriate).

**The review is now finished – we will return later and close the family to Early Help**

# Task 10 – Personal Profile and Running Record

Information held about individuals held on the system is stored in the personal profile section of Synergy (EISi).

We can search for individuals using the search bar in the ribbon menu.

- Search on the family name

You need to ensure you are searching on my cases if they are allocated or on people (fig 26)

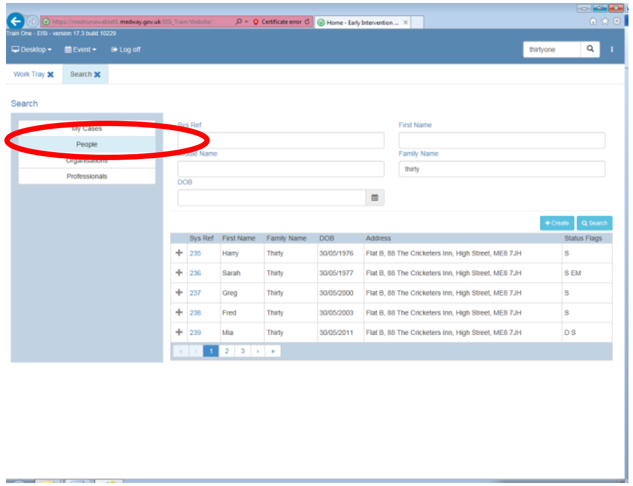


Fig 26

- Click on sys ref number to bring up the person profile. (fig 27)

You will notice that the name bar (at the top) has turned green. This indicates that the Individual currently has Early Help open. (fig 27)

We are able to see other documents or events relating to individual by viewing the running record.

- Click on the Running Record option

You can see the Early Help Assessment and Early Help Review is displayed.

- If you click on these you can view them.

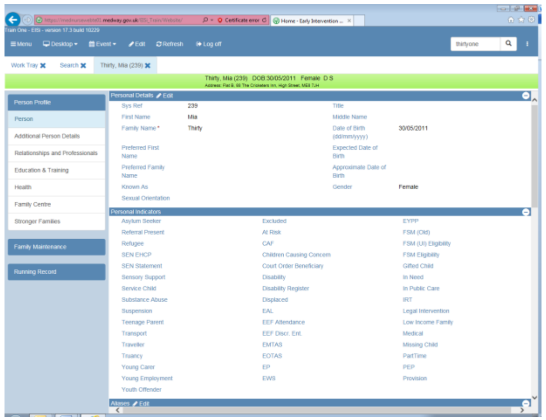


Fig 27

## Task 11 – Adding an Event

Synergy allows users to record events and link them to the individuals or families concerned. Events are similar to case notes which were recorded in MOSAIC.

Let's suppose we receive a phone call. To add this information to the running record we need to

- 🖱 on event and select phone call. The phone call screen (fig 28) appears
- Complete the from box with the name (this is a free text box). You can see the date has automatically been added.
- Select phone call from the phone call type drop down
- In the concerning box use the magnifying glass to add all the relevant family members.
- In the subject we can add "Call about review meeting"
- In the message details we can add "name… called, they are unable to make the review meeting tomorrow."
- Once we are happy with the comments, we can 🖱 save and complete (near the top), then OK.

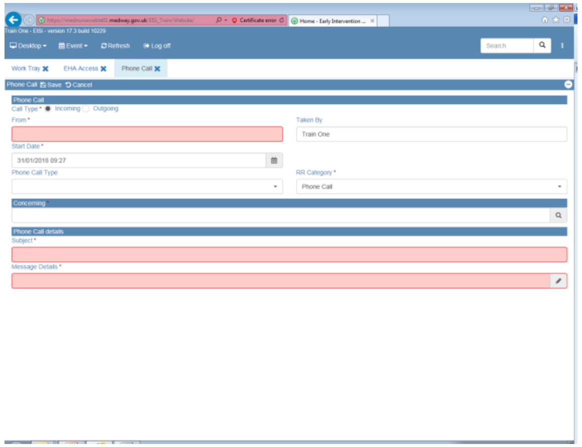


Fig 28

If we now return to the running record, we can see the phone message is now recorded.
If it isn't there 🖱 person profile, and then running record to refresh. Alternatively, press the F5 key to force refresh the screen.

When adding an event please try to use the most relevant event type. In MOSAIC, the case note option is selected for all events. The Synergy system is more powerful and allows uses to select from a wider range of options which help us record information in a more effective manner.

**Be mindful that you must not set a date/time in the future. If you do the event cannot be completed.**

## Task 12 – Adding A Warning

There may be a situation where a warning needs to be added to Synergy to alert others of a potential concern about an individual on the system.

To add a warning, we need to be in the person profile section of Synergy. Let's add a warning about name….

Type in the name in the top right search box and 🖰 the magnifying glass

- Ensure you are in the "my cases or People" category
- 🖰 on the sys ref number to bring up the person profile. They have a green band indicating they are open to Early Help.
- Scroll down until you find the warnings section. 🖰 on edit to open this section
- 🖰 add a row, you will now see 3 red boxes. Select "the warning risk" in the description (fig 29)
- Add today's date. The Warning Review needs to be 6 months from today's date.
- Now 🖰 on the + to add additional information, add "detail"
- 🖰 save, then OK
- Log out of the system, then log back in and search for their record.

You will now see he has an exclamation mark next to his name.

- 🖰 on the exclamation mark and the warning information will be displayed.

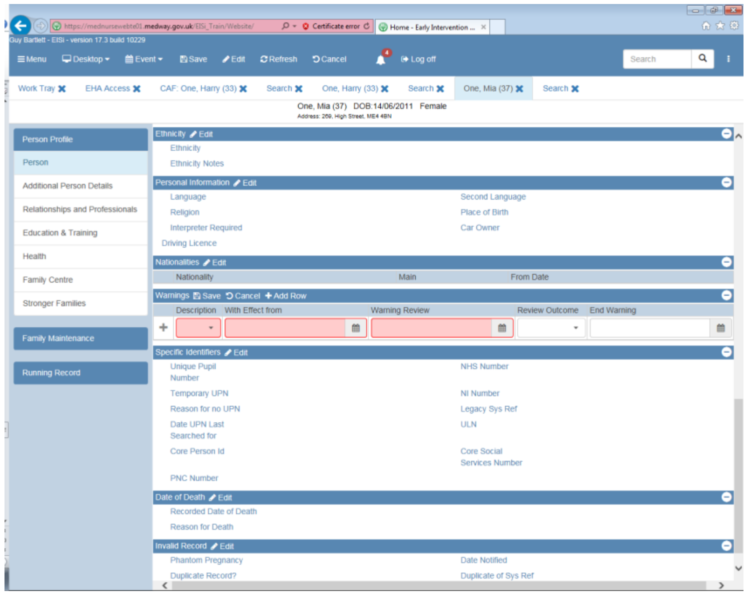



Fig 29

## Task 13 – Closing the EH Process

Reviews take place at regular intervals and progress is recorded. At the end of each review the next steps are selected. Usually, the next steps will be progress to review. This will ensure the process continues until all outcomes are achieved.

The review form is the same whether it is the first review, subsequent reviews or the final review

Early Help may be closed for a range of reasons. The usual reason for closure is all the outcomes have been achieved.

Where the family have been supported for a period of time and have made good progress. The family and the professionals all agree that all their outcomes have been achieved and the family are now more resilient. Everyone agrees that Early Help can be closed.

The practitioner begins a new review form as they would have done for each of the previous reviews. (Work Tray / incomplete actions etc, etc…) Once the mandatory fields have been completed and evidence collected to demonstrate the achievement of each outcome, **the practitioner ensures the "date action achieved" boxes for all desired outcomes are populated.**

- Find the desired outcome and type "name… has joined the happy club and attends weekly. For example," Add today's date.
- They then select "outcomes achieved" in the progress since last review box.
- Finally, under next steps they select "Approval for closure desired outcomes achieved" for all family members.
- The form is then saved and completed.

Return to the Work Tray and select Incomplete Actions. Click on the review. Once it loads into the preview pane scroll to the bottom and click on the + in "Next Steps"

You will now see several options. Tick all options click on dismiss for each family member.

Finalising The Early Help Process.

Although we have completed the final review and are no longer working with the family if we return to the person profile, we see that the green band is still visible, indicating that the family are still open to EH.

**To finalise the process** the practitioner **opens the latest version of the EHA** (using the running record)

Once it opens in the preview pane selection actions and edit version in the ribbon bar. (Actions/edit version)

It now loads the original EHA. We need to edit it by click on actions/edit in the ribbon bar

In the Next Steps section choose the Approval For Closure Desired Outcomes Achieved option then save and complete.

Once the form has been completed click ok and then F5 to refresh the screen.

You will now see the green band has changed to white, indicating that the family is no longer open to EH (fig 30)

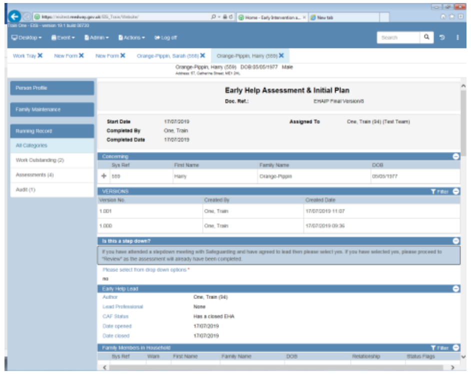


Fig 30

(Fig 17) They click on edit (in the actions menu) and scroll down to the next steps section. They now select "Close desired outcomes achieved" for each family member.

Finally, save and complete.

# Closing Early Help Due to Other Reasons

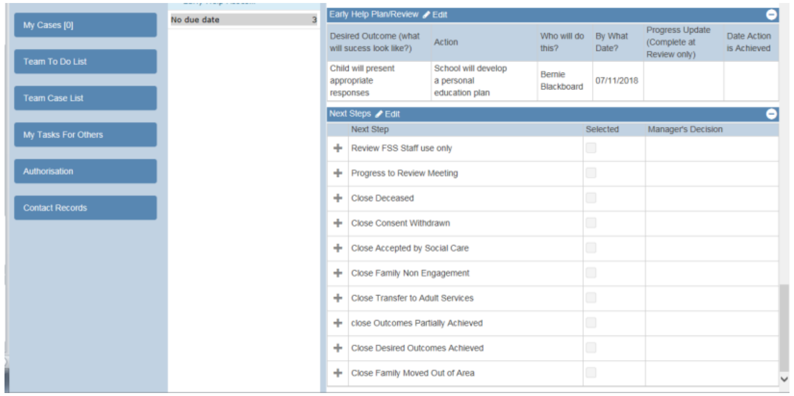



Fig 30a

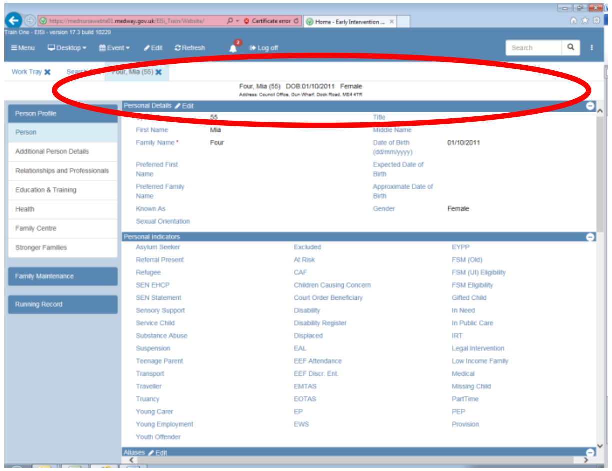


Fig 30b

Sometimes it may be necessary to close the process before all outcomes have been achieved. Some of the reasons for this could be

**Individual deceased**
**Family withdraw consent**
**Case accepted by social care**

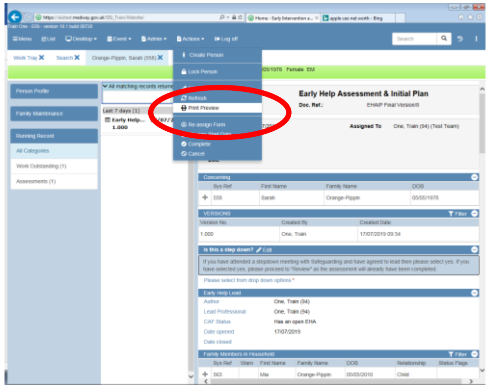
**Family non-engagement**
**Transferred to adult services**
**Outcomes partially achieved**

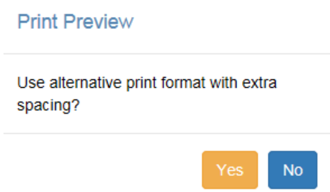
All of these options can be found on the synergy system in the next steps section

## Task 14 – Printing a Form

There may be times when the practitioner needs to print a form. For example, the EHA or a Review. Although forms can be viewed in a variety of ways within Synergy the only way a document can be printed is from within the running record. Let's suppose we need to print the current review form for the family.

- Enter the family name in the ribbon search bar. This will bring up the family details. (People tab!)
- 🖱 on a family member and then 🖱 on the running record (left hand side)
- The list area will now show all the information stored on Synergy. For example, EHAs, EHRs, Phone calls, Case notes etc.
- 🖱🖱 on the document you wish to print, in this case the most recent EHR, and it will open.
- In the ribbon bar click on actions and then you will see a print preview option (fig 31). 🖱 this selection.



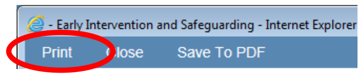




Fig 31

Fig 32

Fig 33

You will be asked if you want to use alternative print format with extra spacing.

- Click either option, they both produce the same result. (fig 32)

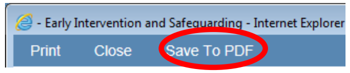
- Synergy will now give three options "Print", "Close" or "Save to PDF" For training purposes we will 🖱 "close" (fig 33)

# Task 15 – Adding a Watermark

You may wish to add watermarks to all printed documentation you give to professionals and family members. To do so follow these steps.

Go to print preview (see last page).

Fig 34



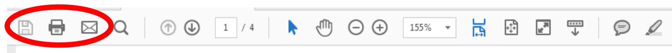

Select Save To PDF (fig 34)

Now click open (fig 35)

Fig 35


Next, select the printer icon (fig 36)

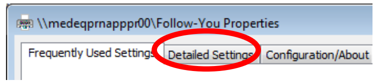
Fig 36



Now choose the properties button.

Select detailed settings (fig 37), then click on the bottom option labelled "Effects"

Fig 37

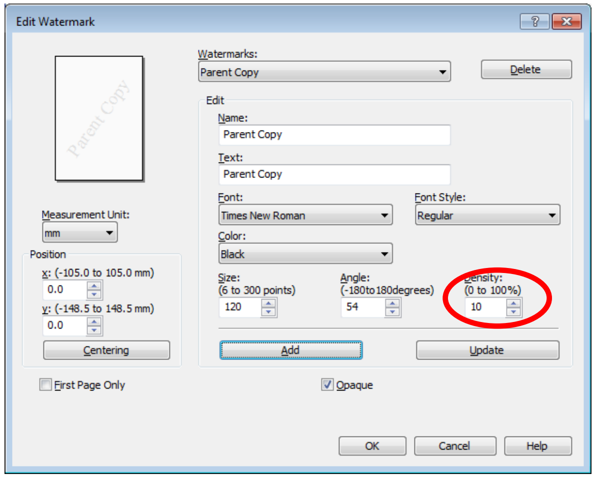



Place a tick in the "print watermark box" and click on the edit button.

Remove the word CONFIDENTIAL form the name and the text boxes and replace them with an appropriate alternative (eg Parent's Copy).

Then find the density box and reduce it from 50% to 10% (fig 38)

Fig 38




Now click ADD, OK, OK, PRINT and your document will print with the relevant watermark.

## Task 16 – Adding an Attachment

There may be times when a file needs to be attached to a record. To do this simply

- 🖱 on the event option in the ribbon bar and 🖱 on attach file.
- You will then be asked to add a date (normally you'd select today's date). Select the most appropriate category.
- 🖱 on upload file and you will then be able to select the file you want to attach (fig 39). Select the file and 🖱 open (fig 40).
- Finally, use the magnifying glass to add all of the individuals this file is concerning.
- Once populated, save it. The document is then stored on Synergy and will appear in the relevant running record

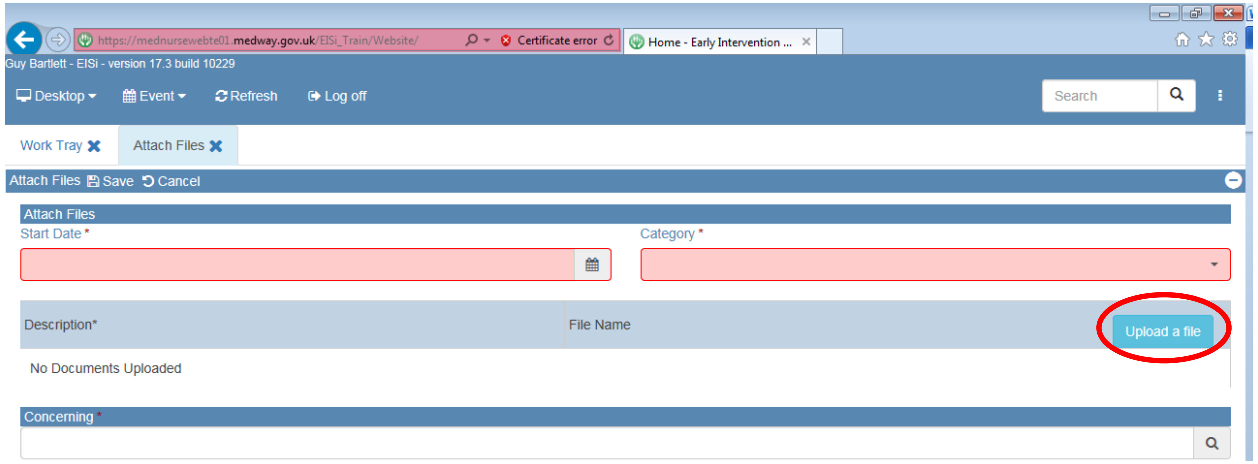



Fig 39

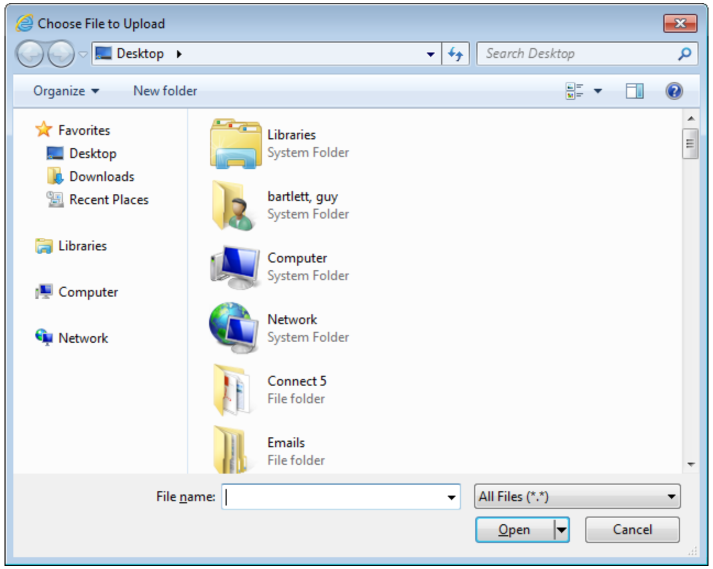



Fig 40

*Hint : Tip – Remember, any box which is red within Synergy, or has a red asterisk next to it, is a mandatory field and has to have data in it before moving on.*

# Congratulations - You have finished the hands-on practical tasks.

**If you encounter any problems with Synergy, we are able to help.**

**Please contact the Early Help Team and explain the problem, we are usually able to support with synergy issues between 9am-5pm Monday to Thursday and 9am-4pm on Fridays.**

**It is always best to phone for support (or speak to us face-to-face).**

**If you need to email then please sent your request to our generic email (ehtt@medway.gov.uk) not to a named individual as that person may not be able to respond as rapidly.**