



Activities Linked People

The Link People Panel

Any number of people can be linked to an existing Activity. For example these could be children, staff, parents/carers etc., some or all of who might be required to attend meetings. When you have linked a person you will then have the opportunity to link some or all of their Key Contacts.

When you are adding a new Activity the **Activity Owner** is added automatically as a Linked Person.

A **Subject** is a person who will benefit from the Activity. An Activity can have more than one subject.

If you enter Start and End Times for the person's involvement with the Activity the Total Time is calculated automatically. You cannot type into this field.

You can select any number of Activity **Support Types** for the Linked Person. The Support Types available are those of the Service Team to which the Activity Owner belongs and that has been selected for the Activity.

Click **+** Add to link more people to the Activity.

Name	Role	Establishment	Send To ContactPoint	Sensitive Service Involvement	Pre-Archive Period	Lead Practitioner	Subject	Scheduled	Attendees	Attendance Codes	Start Time	End Time	Total Time	Group Size	Support Type	Memo	Add	Edit	Remove
John Smith			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				0:00	0			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This is a very wide panel so you will need to use the **scroll bar** to see all the columns.

Each Activity can only have one **Lead Practitioner**. If the Activity has been flagged to be sent to ContactPoint then this is mandatory.

Indicates if they are scheduled to attend and/or have actually attended the Activity. The drop down of Activity **Attendance Codes** is defined for this Service Team in Service Team Administration.

Displays if no Memo has been recorded for this person and if a Memo has been recorded for them in this context. Click the icon to add, read or edit a memo.

You can add or edit all details of a linked person's role in the Activity directly in the grid. Alternatively, select the person and click **Edit** to open the **Linked Person window** where you can add or edit details specific to their role in the Activity.

Linking Additional People

To link a person to the Activity (in this case a student), click **+** Add on the Link People panel. This opens the Person Enquiry.

1. Enter the name of the person you wish to add, select other criteria if necessary and click **Search** to list all potential matches. Highlight their name and click **Select** to add them to the list below, then click **OK** to return to the Link People panel.

You must now Save the Activity to create the link between the Activity and the person.



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Once a person has been linked to an Activity and the Activity has been saved, you can also add some of their key contacts (e.g. parents, social workers) without searching again:



2. Click **Add** on the Link People panel to open the Person Enquiry, then click on the **Key Contacts** tab. Use the dropdown to choose the name of the person whose contact(s) you wish to add.

3. Click in the boxes to choose the Key Contacts to link. Their name will be added to the list of Linked People.

Name	Role	Establishment	Memo	Lead Practitioner	Subject	Sche
Jc				No	No	No
Kc						

Name	Role	Establishment	Send To Cont	Sens Servi Invol	Pre-Archive Period	Lead Practitioner	Subject	Scheduled	Att	+
Jc			...	X	X	X	X	X	X	+
Kc			...	X	X	X	X	X	X	-
Jc			...	X	X	X	X	X	X	+

4. Click **OK** to return to the Activity Details panel.

5. You can now edit the Linked Person's details for this Activity, either directly in the Link People panel or by clicking the **Edit** button to open the Linked Person window.

If an Activity already has Linked People and you then create a recurring series from it, the Linked People will be copied to the recurrences.

If you link people to a Main Activity after creating a recurring series, they will not be copied to the recurrences but must be linked to each Activity separately if needed.



Other Useful Reference Guides:

- Activities_Creating an Activity
- Activities_Recurring Activities
- Activities_Activity Calendar
- Activities_Link to Results Organiser