



# User Guide for Michigan

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The screens, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

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## About This Manual

Edupoint Educational Systems, LLC. develops software with multiple release dates for the software and related documentation. The documentation is released in multiple volumes to meet this commitment.

This document serves as a reference for Edupoint's recommendations and Best Practices for Synergy processes. Due to the complex nature and myriad configurations possible within the Synergy software, it is not feasible to include every possible scenario within this guide.

## Conventions Used in This Manual

- **Bold** indicates user interactions such as a button or field on the screen.
- *Italics* indicate the option to select or text to enter.
- Notes, Tips, References, and Cautions appear in the margin to provide additional information.



Notes provide additional information about the subject.



Tips suggest advanced options or other ways of approaching the subject.



References list another source of information, such as another manual or website.



Cautions warn of potential problems. Take special care when reading these sections.

## Before You Begin

Before installing any of the Edupoint family of software products, be sure to review the system requirements and make sure the district's computer hardware and software meet the minimum requirements.

## Software and Document History

Document Version	Release Date	Software Release	Description
1.0	Apr 2016	10.03	Initial document for release
2.0	Jul 2016	10.04	Updated for release.
3.0	Dec 2016	10.05	No change required.
4.0	May 2017	2018	Updated: <ul style="list-style-type: none"> <li>• <i>Translation of Documents</i></li> <li>• <i>Introduction to the Portfolio Screen</i></li> <li>• <i>Accessing and Editing Student Data and Information</i></li> </ul> Added: <ul style="list-style-type: none"> <li>• <i>Progress Reports</i></li> </ul>

Document Version	Release Date	Software Release	Description
5.0	Dec 2018	2018.01	<ul style="list-style-type: none"><li>• Added <a href="#">APM-1 - Automatic Process Moves Report</a></li><li>• Moved the <i>Managing SE Documents</i> chapter to the <a href="#">Synergy SE – Documents Guide</a> for your state</li><li>• Added Exited field to <a href="#">Admin Progress Report</a></li></ul>

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# Chapter 1: Synergy SE Overview

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## Synergy SE

Synergy SE is a web-based application that provides districts with a solution to efficiently and successfully accommodate the unique needs of their Special Education students.

The software is accessed using a web browser like Internet Explorer, Chrome, or FireFox. Each district chooses whether to make Synergy SE available on the internet or only from the internal district network.

This user guide explains Synergy SE where special education student demographic and report data is recorded. Special education student reports can also be generated here.



For additional information on specific Synergy SE Ad Hoc and Process documents, see the *Synergy SE Documents Guide*.



The setup and configuration of the modules in this user guide is explained in the *Synergy SE Administrator Guide*.

## Launching Synergy SE

1. Open an internet browser.
2. Enter the Synergy SE URL in the address field.
3. Press **Enter**.
4. Enter your **Login Name** and **Password**.
5. Press **Enter**.

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School District

Please enter your login name and password below to access the application.

Login Name

Password

Login

[Substitute Teacher Login](#)

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Education Platform

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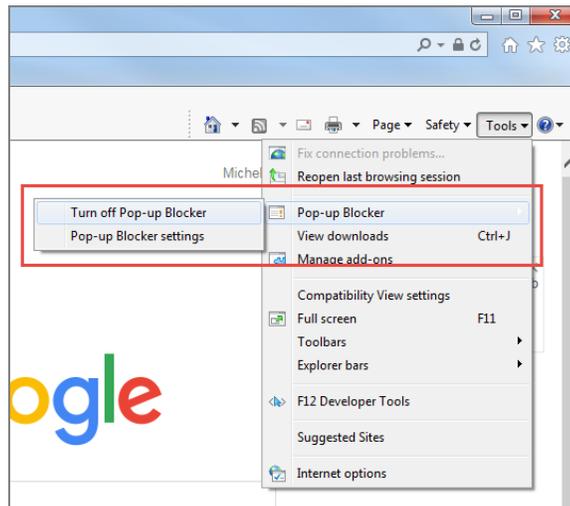
Edupoint<sup>®</sup>

Login Screen

## Disable Pop-Up Blockers

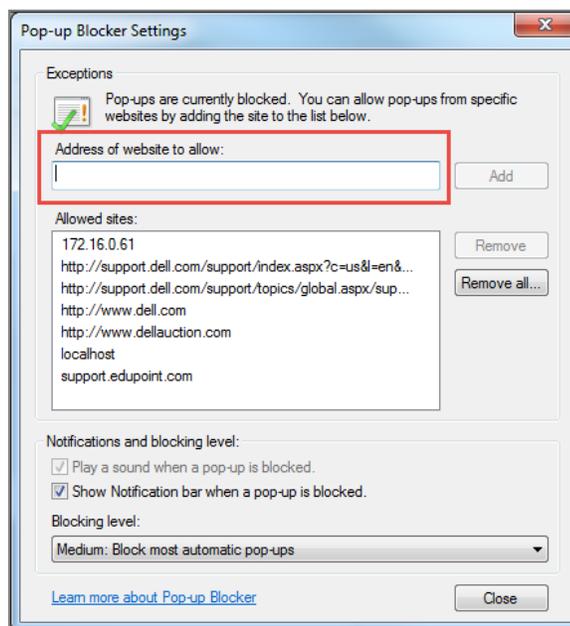
The Synergy SE software does not support the use of Pop-Up Blockers in browsers. Disable any Pop-Up Blockers before logging into the Synergy SE software.

- Internet Explorer:
  - Select **Tools > Pop-up Blocker > Turn off Pop-up Blocker**.



Internet Explorer – Tools Menu

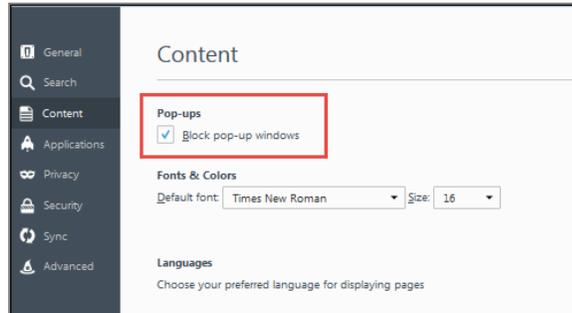
- Select **Tools > Pop-up Blocker > Pop-up Blocker Settings** and add the URL address for Synergy SE in Address of website to allow.



Internet Explorer Pop-up Blocker Settings

- Chrome automatically blocks pop-ups from displaying. When a pop-up is blocked, the address bar displays a pop-up blocker icon .

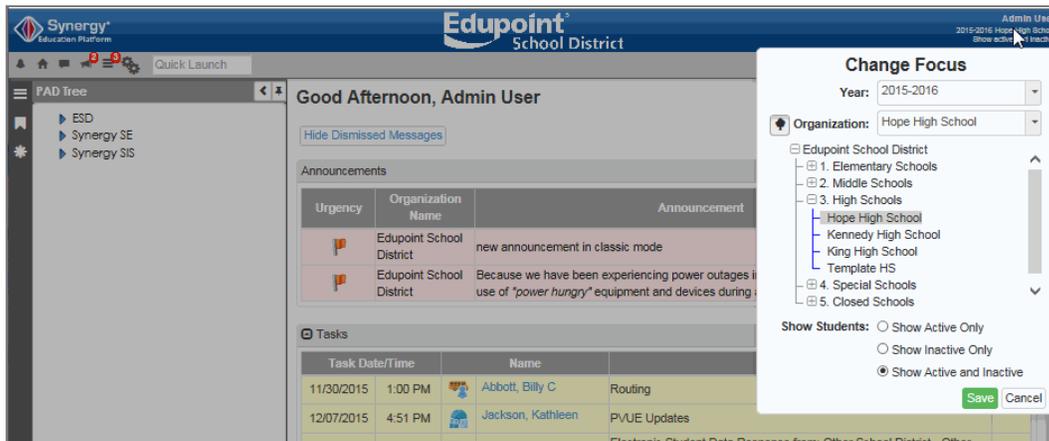
- FireFox:
  1. Click  and select **Options**.
  2. Select **Content**.
  3. Select **Block pop-up windows**.



Firefox Content Screen

## Changing the Focus

Each Synergy SE user is setup to look at records for a specific school and year by default or focus. The focus sets whether inactive students or active students are displayed. The user's current focus is listed at the top right-hand corner of the screen.



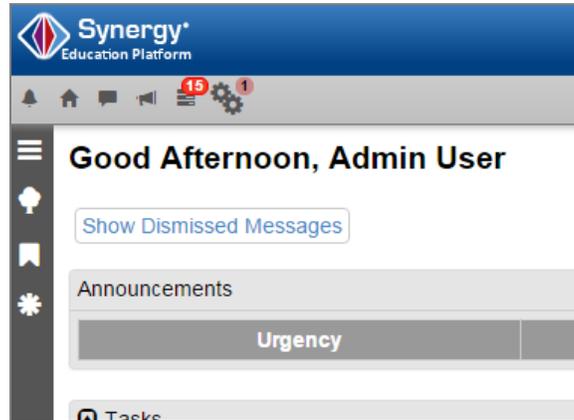
Synergy SE Home Screen, Change Focus

1. Select the focus area. The Change Focus windows displays.
  - To change to a different school year, use the drop-down to select a different school **Year**.
  - To change the **Organization**, use the drop-down or select in the tree.
  - To change whether Active or Inactive students are displayed, select a radio button in **Show Students**.
2. Click **Save**.



## Title Bar Icons

The icons available in the upper left side of your screen allow navigation in Synergy SE.



Home Screen



TeacherVUE – Opens Synergy SIS TeacherVUE for users, such as principals and specialists, who are not automatically directed to TeacherVUE. Use this button to toggle back and forth between Synergy SIS and TeacherVUE to access items such as attendance and Grade Book for assigned students.



Home – Returns you to the Home screen.



Streams – Opens Streams.



Announcements – Displays District Notifications.



Tasks – Displays your tasks



Job Queue Viewer – Displays the Job Queue Viewer and gives access to completed jobs.



Navigation – Displays the [Navigation panel](#).



PAD Tree – Displays the [PAD tree](#).



Bookmarks – Displays screens that you have bookmarked for easy access.



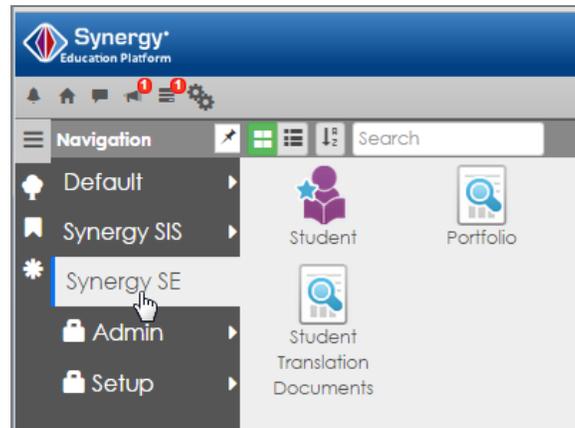
History – Displays recently visited screens.



Quick Launch – Enter the screen name or report ID and select from the drop-down menu.

## Navigation Panel

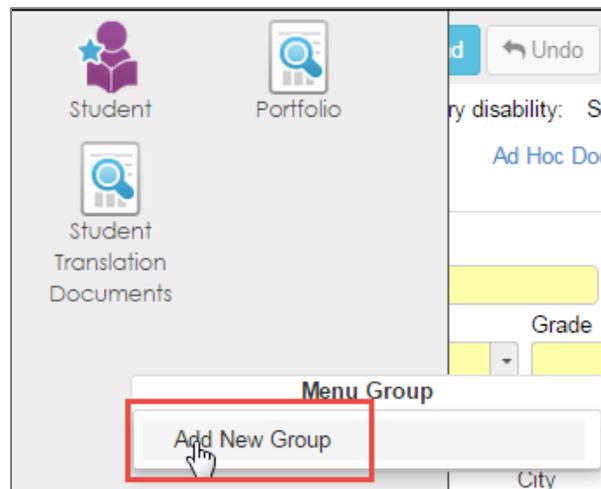
Use the Navigation panel to access shortcuts in Synergy SE.



Navigation Panel

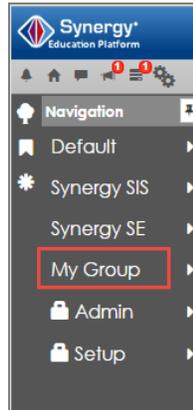
## Editing the Navigation Panel

- To add a group:
  1. Right-click in the panel and select **Add New Group**



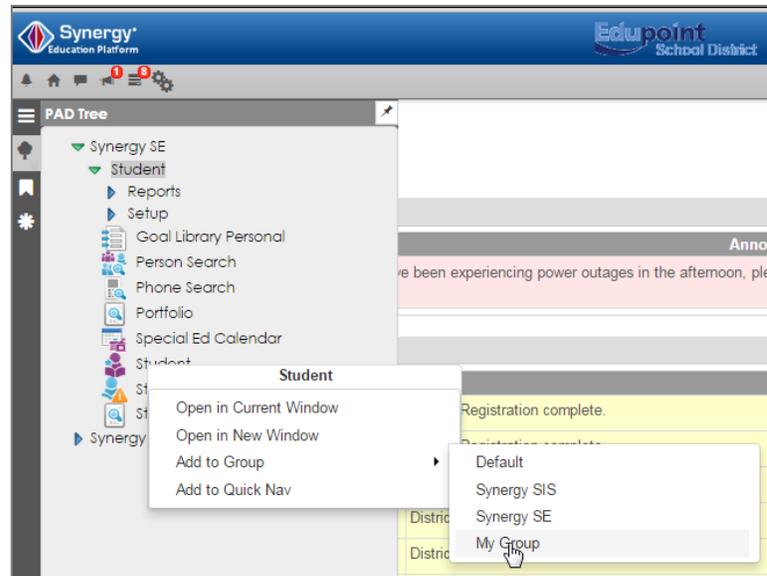
Navigation Panel

2. Enter the name for the group. It displays in the Navigation list.



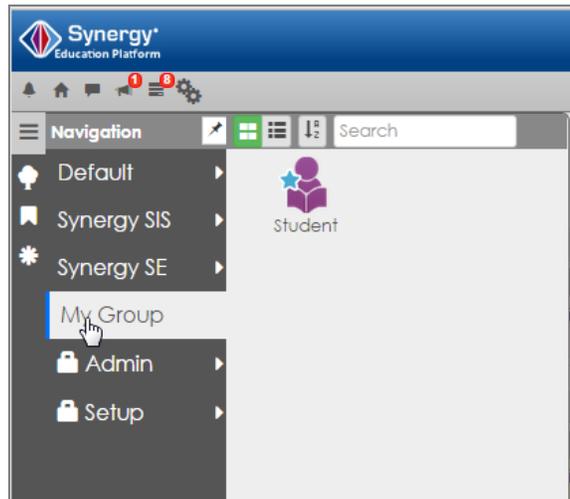
Navigation Panel

- To add icons to your group:
  - a. Navigate to the item in the PAD tree.
  - b. Right-click and select **Add to Group > Group Name**.



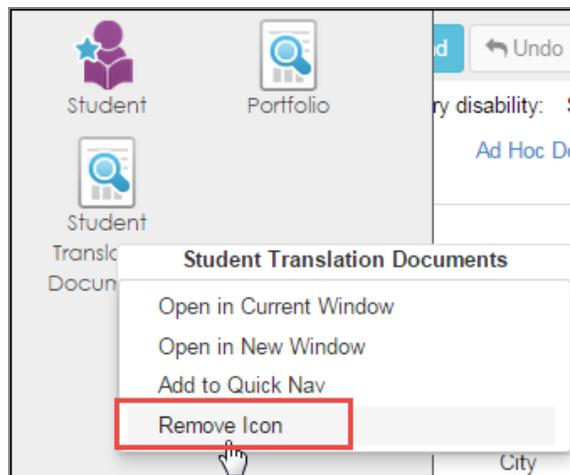
Add Icon To Group

The icon is added to your group.



Navigation Panel, Added Group

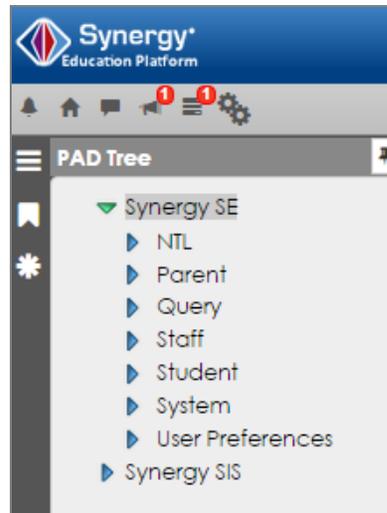
- To delete an icon, right-click the icon and select *Remove Icon*.



Navigation Panel

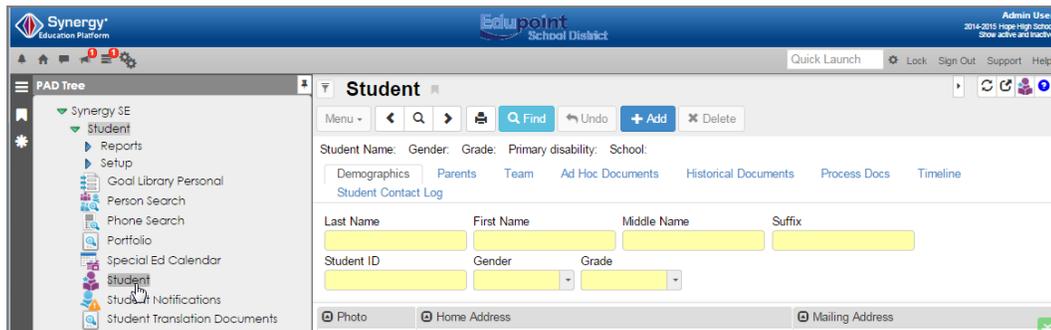
## PAD Tree

1. Click  to toggle the menus.



PAD Tree

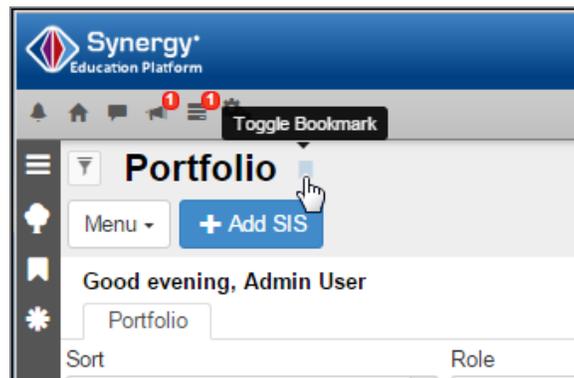
2. Select a screen to display.



PAD Tree

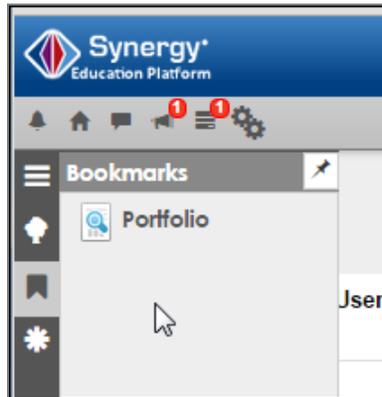
## Bookmarks Panel

Add any view to the Bookmarks panel by toggling the bookmark icon on the view.



Adding A Bookmark

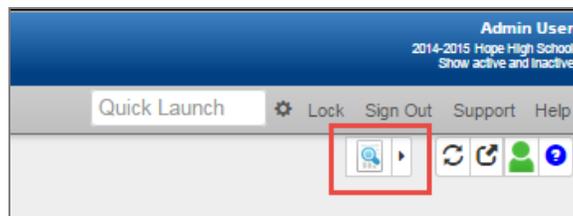
The view displays in the Bookmarks panel.



*Bookmarks Panel*

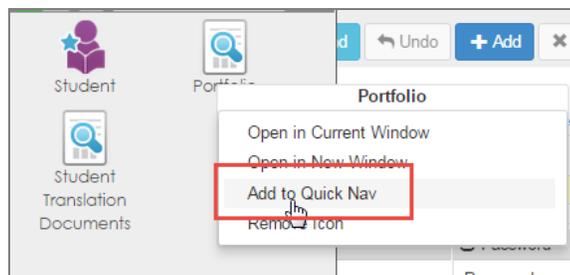
## Quick Navigation Bar

The Quick Navigation Bar is located on the top right side of the screen.



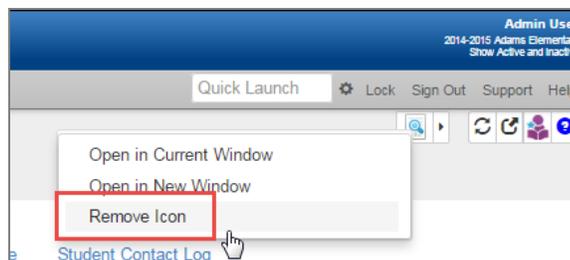
*Quick Navigation Bar*

- To add an icon to the Quick Navigation Bar, right-click the icon and select *Add to Quick Nav*. The icon displays in the Quick Navigation Bar.



*Navigation Panel*

- To remove an icon from the Quick Navigation Bar, right click the icon and select *Remove Icon*.



*Quick Navigation Bar*

## Icons and Buttons



The **Search** icon displays on the Action Bar with various views.

Click the icon to clear the record and activate the **Find** button.



The **Previous** and **Next** icons display on the Action Bar with various views.

Click the icon and the software accesses the database and populates the tab or view with that information.

For example, when using the **Previous** icon, the **Demographics** tab of the Student view currently displays information for Becky Johnson. Barbara Johnson's information is listed immediately before Becky Johnson's information in the database. If you click the **Previous** icon, the software clears the fields of Becky Johnson's information and then populates the fields with Barbara Johnson's information.



The **Add** button displays on the Action Bar with various views.

Click the button to add a record to the view.



The **Delete** button displays on the Action Bar with various views.

Click the button to delete a record from the view.



The **Find** button displays on the Action Bar when search criteria has been entered in a field.

Click the button to have the software search the database for information that matches the criteria entered into a specific field or series of fields.



The **Save** button displays on the Action Bar when the information has been modified in a field on the current view.

Click the button to save your additions or changes to fields in the current view. You cannot switch to another view until you click the **Save** or **Undo** buttons.



The **Undo** button displays on the Action Bar when information has been entered into a field on the current view.

Click the button to remove the additions or changes to fields in the current view.

Only the additions or changes in the current view are removed and not to other views you may have open. You cannot switch to another view until you click the **Undo** or **Save** buttons.



The **Refresh Page** icon displays on the right side of the Action Bar.

Click the icon to refresh the entire view.



The **Detach Page** icon displays on the right side of the Action Bar, next to the **Refresh Page** icon.

Click the icon and a new window displays your active window to allow you to keep this page open while navigating to other screens within Synergy SE.

- Minimize the detached page to navigate other screen.
- Maximize the detached page when you are ready to work in it again.

The **Print Preview** button displays on the Action Bar with highlighted text when the software displays an IEP-related view for a student.

Click the button to generate a PDF of the document (report) that you are working on. The software generates a PDF file to display the document in Adobe Acrobat Reader in the user's browser.



The **Expand** icon displays on the right side of the Title Area when the Quick Navigation bar is collapsed.

Click the icon to expand the Quick Navigation Bar.



The **Collapse** icon displays on the right side of the Title Area when the Quick Navigation Bar is expanded.

Click the icon to collapse the Quick Navigation Bar.



The **Down Arrow** icon displays on group boxes and text boxes.

Click the icon to expand the group box or increase the size of the text box.



The **Up Arrow** icon displays on group boxes and text boxes.

Click the icon to collapse the group box or decrease the size of the text box.

The **Show Detail** icon displays on the right side of some grids.

Click the icon to display additional details for the item selected in the grid.

The **Hide Detail** icon displays on the right side of some grids.

Click the icon to collapse the detail section and return to a grid.



The **Calendar** icon displays in date fields.

Click the icon to select the date from the calendar. Dates may also be entered in **MM/DD/YYYY** format.



The **Spell Check** icon displays in text boxes.

Click the icon to spell check the text in the text box.

Please repond

Misspelled words in text boxes are indicated by a red line.

Right-click to select the correct word.



or

The **Expand** icons display in text boxes.

Use the arrows or drag the corner to expand the text box.

## Finding and Sorting Records



The records available are controlled by the [focus](#). For example, if the focus is set to only show active students at a specific school, an inactive student's records cannot be found by scrolling nor active student's at a different school.



Screens are automatically in Find mode when you log in to Synergy SE. Once a student record has been selected, that student's records appears in all of the student-related screens. For example, if you are looking at a student's records in the Student screen and then view the Health screen, that student's records display in the Health screen without searching for them.

## Scrolling to Find Records

Use the scroll buttons to scroll through the records. Records are sorted alphabetically by the first field on the screen.

The screenshot shows the 'Student' screen interface. At the top, there is a 'Menu' dropdown and navigation buttons: left arrow, search icon, and right arrow. The search icon and right arrow are highlighted with red boxes. Below the navigation buttons are 'Save', 'Undo', '+ Add', and 'x Delete' buttons. The student information displayed is: Student Name: Abbott, Billy C., Gender: Male, Grade: 12, Primary disability: School: Kennedy High School. Below this is a tabbed interface with tabs for Demographics, Parents, Team, Ad Hoc Documents, Historical Documents, Process Docs, Timeline, and Student Contact Log. At the bottom, there are input fields for Last Name (Abbott), First Name (Billy), Middle Name (C), Suffix, Student ID (905483), Gender (Male), and Grade (12).

Student Screen

## Searching by Primary Field

Use Find mode to find the exact record when searching through large groups of records.

1. Click to clear the existing record.
2. Enter the text you want to search for in the appropriate field. For example, a student's last name.

The screenshot shows the 'Student' screen in Find mode. The navigation buttons at the top are 'Menu', left arrow, search icon, right arrow, and 'Find'. The 'Find' button is highlighted in blue. Below the navigation buttons are 'Undo', '+ Add', and 'x Delete' buttons. The student information fields are empty, with the text 'Student Name: Gender: Grade: Primary disability: School:' displayed above them. The tabbed interface and input fields at the bottom are the same as in the previous screenshot, but the 'Last Name' field contains the text 'Abbot'.

Student Screen

3. Click **Find** or **Enter**. The first record with that information displays.

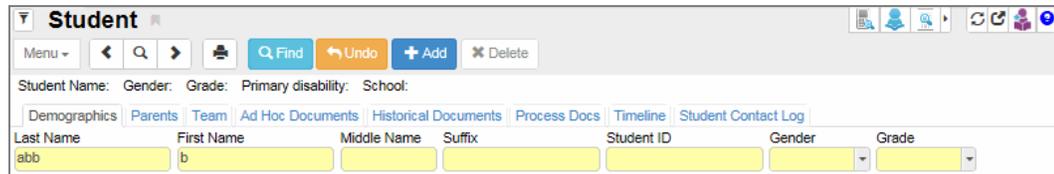


If searching by last name, use the scroll buttons to look at other student records with the same last name.

## Searching Using Multiple Fields

In some instances, more than one piece of information should be used in the search. For example, there may be several students with a last name of Smith.

1. Click  to clear the existing record.
2. Enter the text you want to search for in the appropriate fields. For example, part of a student's last name and part of the student's first name.



The screenshot shows the 'Student' screen in Synergy SE. At the top, there is a 'Menu' dropdown and navigation buttons (back, forward, search, print). Below that are 'Find', 'Undo', 'Add', and 'Delete' buttons. The search criteria are: Student Name, Gender, Grade, Primary disability, and School. There are tabs for Demographics, Parents, Team, Ad Hoc Documents, Historical Documents, Process Docs, Timeline, and Student Contact Log. The search fields are: Last Name (abb), First Name (b), Middle Name, Suffix, Student ID, Gender (drop-down), and Grade (drop-down).

*Student Screen*

3. Click **Find** or **Enter**. The first record with that information displays.

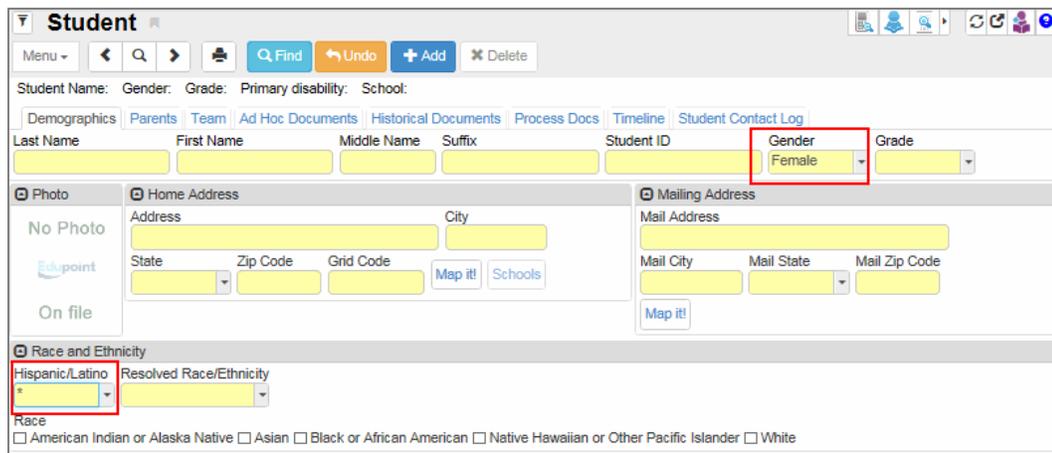
## Using the Find Results Grid

When information is entered in the primary field, Find mode tries to match the criteria and display the specific record in the Synergy SE database. However, the Find Results grid displays when multiple results are available from the search criteria such as:

- Primary field left blank.
- Asterisk (\*) placed in any field.
- A specific selection is made from a drop-down. For example, Female is selected from the Gender drop-down.

To use the Find Results grid:

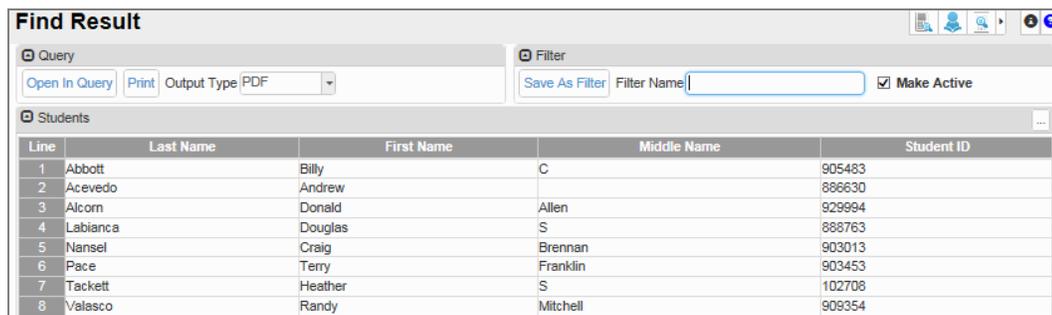
1. Click  to clear the existing record.
2. (Optional) Enter an asterisk (\*) in the appropriate fields or make a selection from a drop-down. The placement of the asterisk (\*) in the field controls how the existing information entered in the field is matched to the records.
  - If the asterisk (\*) is placed before the text, the text must be matched exactly in the field.
  - If the asterisk (\*) is placed after the text, it matches any records that start with that text in the field.
  - If the asterisk (\*) is placed before and after the text, the text may be anywhere in the field.
  - If the asterisk (\*) is placed in the middle of the text, the field must start with the text before the asterisk and end with the text following the asterisk.



The screenshot shows the 'Student' form with several fields highlighted with asterisks to indicate search criteria. The 'Gender' dropdown is set to 'Female' and the 'Race' dropdown is set to 'Hispanic/Latino'. Both dropdowns have an asterisk (\*) placed before the selected text. Other fields like Last Name, First Name, Middle Name, Suffix, Student ID, and Grade are empty.

Student Screen

3. Click **Find**. The Find Result screen displays based on the search criteria



The screenshot shows the 'Find Result' screen with a table of students. The table has columns for Line, Last Name, First Name, Middle Name, and Student ID. The data is as follows:

Line	Last Name	First Name	Middle Name	Student ID
1	Abbott	Billy	C	905483
2	Acevedo	Andrew		886630
3	Alcorn	Donald	Allen	929994
4	Labianca	Douglas	S	888763
5	Nansel	Craig	Brennan	903013
6	Pace	Terry	Franklin	903453
7	Tackett	Heather	S	102708
8	Valasco	Randy	Mitchell	909354

Find Result Using Empty Fields



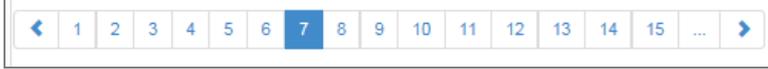
The screenshot shows the 'Find Result' screen with a filtered table of students. The table has columns for Line, Last Name, First Name, Middle Name, Student ID, Gender, and Hispanic/Latino. The data is as follows:

Line	Last Name	First Name	Middle Name	Student ID	Gender	Hispanic/Latino
1	Tackett	Heather	S	102708	Female	Non-Hispanic

Find Result Using Asterisk

4. Select a line to display the record.

If more than one page of records match the criteria, the additional page numbers are displayed at the bottom of the Find Results screen.



*Find Result Screen*

- To display a specific page, click on the page number.
- To select another record, select a different line.
- To advance to the next page, click .
- To see additional page numbers, click .



At the top of the Find Result screen, there is the option to save the results as a query or filter. See the [Synergy SE – Query & Reports Guide](#) for more information about using the Find Results grid to produce reports or filter the students displayed.

# Chapter 2: Managing the Synergy SE Account

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## Changing Password

The screenshot shows the 'User Password and Preferences' window. At the top, there are 'Save' and 'Undo' buttons. Below that, the user name is 'User, Admin'. There are three tabs: 'Password', 'Preferences', and 'Report Preferences'. The 'Change Your Logon Password' section is active, containing three text input fields for current password, new password, and confirmation. A 'Remember' note at the bottom states: 'Remember: If your password contains capital letters, be sure to type them the same way every time you login.'

*User Password And Preferences Screen*

1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. **Type your current password.**
3. **Type a new password.**
4. **Type the new password again to confirm the password.**
5. Click **Save**.

## Setting Preferences

Use the **Preferences** tab to change the:

- Number of pages displayed in a search
- Number of records displayed on a page
- POV Home Page
- Preferred log on application

The screenshot shows the 'User Password and Preferences' window with the 'Preferences' tab selected and highlighted with a red box. The 'User Name' is 'User, Admin'. The 'Preferences' section is expanded, showing three sub-sections: 'Paging Preferences' with 'Paging Size' and 'Paging Row Size' input fields; 'Point Of View Home Page' with a 'POV Home Page' input field and a 'Change POV Home Page' button; and 'Log in Preferences' with 'Preferred Application To Log Into' and 'Last Log In Page' dropdown menus.

*User Password And Preferences Screen, Preferences Tab*

## Paging Preferences

Use Paging Preferences to increase the number of records viewed to reduce the number of times a different set of records display.



Searches display more slowly when more records display.

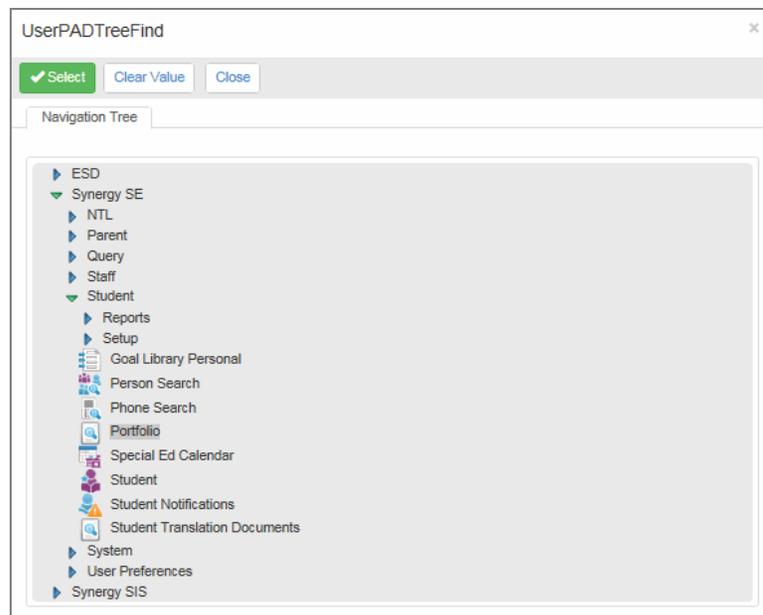
1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. Select the **Preferences** tab:
  - To change the number of pages displayed in a search, enter a number in **Paging Size**. The default is 15.
  - To change the number of records displayed on a page, enter a number in **Paging Row Size**. The default is 20 rows.
3. Click **Save**.

## Point of View Home Page

The Point of View Home Page is the initial screen displayed after logging into Synergy SE. By default, this is usually the Synergy SE home page which displays announcements, a task list, and the dashboard widgets.

To change the POV home page:

1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. Select the **Preferences** tab.
3. Click **Change POV Home Page**. The UserPADTreeFind screen displays.



*UserPADTreeFind Screen*

4. Use  to find and select the screen.
5. Click **Select**. The selected screen displays in the **POV Home Page** field.



*User Password And Preferences Screen, Preferences Tab*

6. Click **Save**.

## Log in Preferences

If you have access to Synergy SIS, TeacherVUE, and Synergy SE, you can select which application displays first after you log in:



*User Password And Preferences Screen, Preferences Tab*

1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. Select the **Preferences** tab.
3. Select the **Preferred Application to Log Into**.
4. Click **Save**.

## Report Preferences

1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. Select the **Report Preferences** tab.
3. Modify the report preferences.

The screenshot shows the 'User Password and Preferences' interface. At the top, there are tabs for 'Password', 'Preferences', and 'Report Preferences', with 'Report Preferences' being the active and highlighted tab. Below the tabs, there are several sections of preferences, each with a title and a list of options:

- Student Profile:** Includes checkboxes for 'Suppress Photo', 'Hide Health Conditions', 'Hide Parent Info', 'Hide Emergency Info', 'Hide Physician Info', 'Hide Signature Info', 'Include Health Condition History', and 'Show Homeroom Teacher'.
- Student Schedule:** Includes checkboxes for 'Hide All Personal Info', 'Hide Perm ID', and 'Full Schedule When Printed From Menu'. It also has a dropdown menu for 'Sort Schedule by Period, then Term, and finally by'.
- Discipline Profile:** Includes a checkbox for 'Include Full History'.
- Student Attendance Profile:** Includes checkboxes for 'Hide Type Totals', 'Hide Reason Code Totals', 'Include Current Schedule', 'Hide Parent Information', and 'Show All Day Reason Code Totals'.
- Reporting Preferences:** Includes a checkbox for 'Use Simple Header'.
- Phone Number Options:** Includes a dropdown menu for 'Mask Phone Numbers'.
- IDSS01 Preferences:** Includes checkboxes for 'Hide Custodial Information', 'Hide Messages to Parent', and 'Use Custom Acknowledgement Text'. It also has a text input field for 'Custom Acknowledgement Text'.

*User Password And Preferences Screen, Report Preferences Tab*

- Select the desired preferences for the various report profiles.
- Select how to **Mask Phone Numbers** on reports.

This close-up screenshot focuses on the 'Phone Number Options' section. The 'Mask Phone Numbers' dropdown menu is open, displaying two options: 'Mask unlisted phone numbers' and 'Show unlisted phone numbers'. The 'Mask unlisted phone numbers' option is currently selected.

*User Password And Preferences Screen, Report Preferences Tab*

- Enter the desired **Custom Acknowledgment Text** to customize the acknowledgment message on the IDS801 report.

*User Password And Preferences Screen, Report Preferences Tab*

 The IDS801 Preferences refer to the printable Disciplinary Action Form in the detailed view of **Synergy SIS > Discipline Incident > Student Incident, Discipline** tab. The form contains an acknowledgment statement in the **Signatures** box that can be customized.

4. Click **Save**.

## Setting User Profile

Use the User Profile screen to view and/or modify demographics information, modify tool bars, view security information, set spell check options, or change how your home screen appears.

### Demographics Tab

Use the **Demographics** tab to view or modify your home address and phone information.

✕	Line	Primary	Type	Phone	Extension	Contact	Listed
■	1	<input type="checkbox"/>	Cell	480-555-1111	22	<input type="checkbox"/>	<input type="checkbox"/>

*User Profile Screen, Demographics Tab*

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Make desired modifications:
  - Change your **Email** address.
  - Enter a new **Password** and **Confirm Password**.
  - Update your **Address, City, State,** and / or **Zip Code**.
  - Set Preferences:
    - Select the **Default Mode**.
      - *Edit* - All screens can be edited without clicking **Edit**.
      - *Inquiry* - All screens are set to read-only. Must click **Edit** to change the screen.



Inquiry mode can help prevent accidental edits to the records, but can add an extra step for data entry personnel who constantly edit records.

- **Show Quick Launch** - Select the checkbox to use the Quick Launch field in the tool bar.



Quick Launch Field

- Set the **Paging Size, Paging Row Size,** and **POV Home Page**.

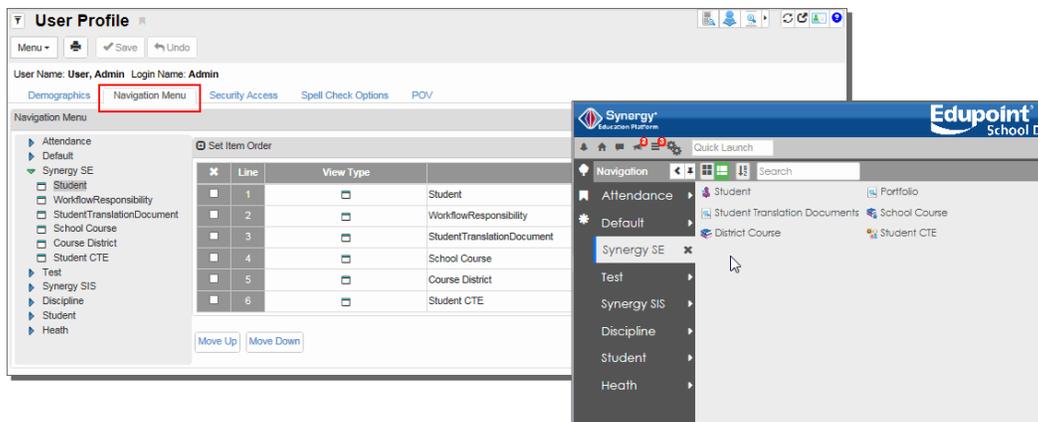


These fields can also be set on the **Preferences** tab of the User Password and Preferences screen. See the [Setting Preferences](#) instructions for details.

- Add phone numbers.
    - a. Click **Add**. A new row displays.
    - b. Indicate if it is the **Primary** number to call.
    - c. Select the **Type**.
    - d. Enter an **Extension** if needed.
    - e. Select if it is a *Contact* or *Listed* number.
3. Click **Save**.

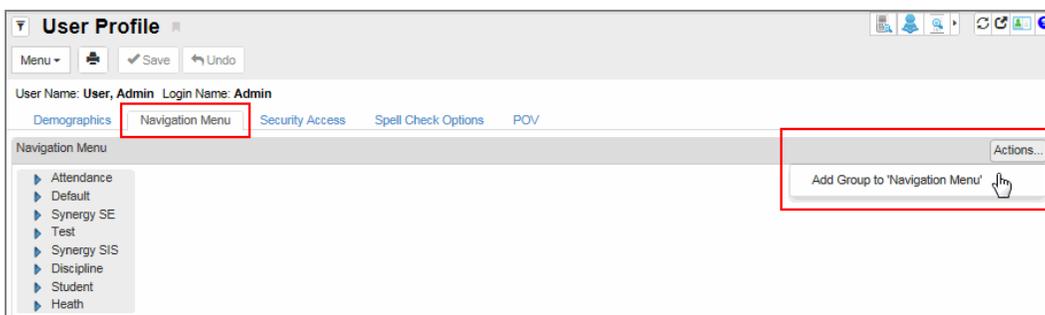
## Navigation Menu Tab

Use the **Navigation Menu** tab of the User Profile screen to modify custom tool bars that display on the left side of the Synergy SE screen.



User Profile Screen, Navigation Menu Tab

## Add Group



User Profile Screen

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **Navigation Menu** tab.
3. Select **Add Group** from the **Actions** menu. The GroupAddDetail screen opens.



Make sure nothing is selected under the Navigation Menu. Click **Navigation Menu** to deselect.

4. Enter a name for the toolbar.
5. Click **Save**. The new group displays in the Navigation Tree.
6. (Optional) Adjust the group order.
  - a. Select the line number of the group to highlight.
  - b. Click **Move Up** or **Move Down** until the
  - c. Repeat until the groups are in the desired order.

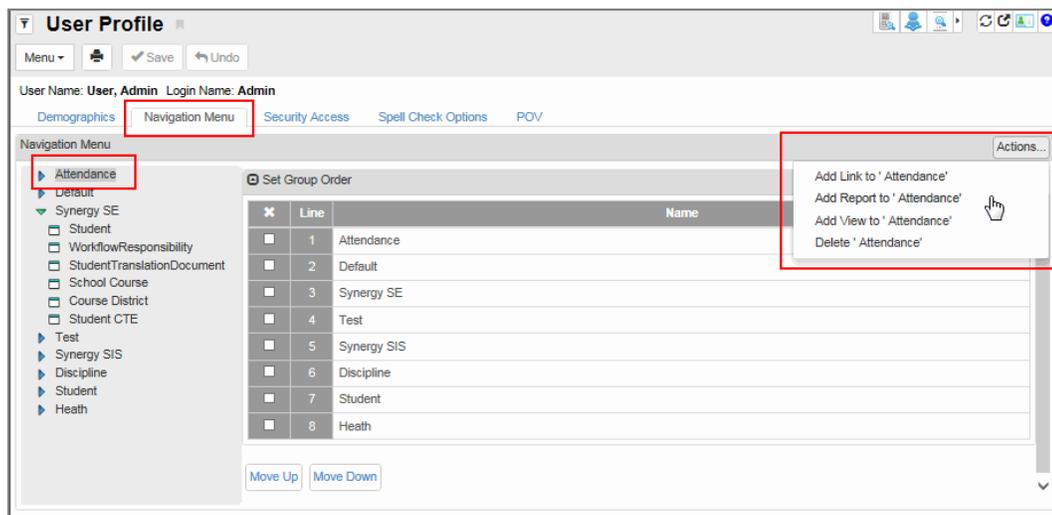
- Click **Save**.



To delete a group, check the box in the **X** column and click **Save**.

## Add or Delete Screens, Reports, and Links to a Group

- Navigate to **Synergy SE > User Preferences > User Profile**.
- Select the **Navigation Menu** tab.
- Select the Group name under the Navigation Menu to highlight.



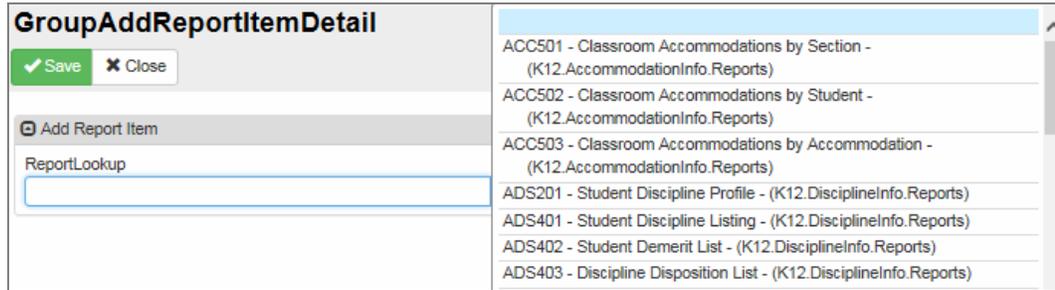
User Profile Screen

- Make a selection:
  - To add a link to an external site:
    - Select **Add Link to 'Group Name'** from the **Actions** menu. The GroupAddLinkDetail screen displays.
    - Enter the **Web Page or External Link Item**.
    - Click **Save**.



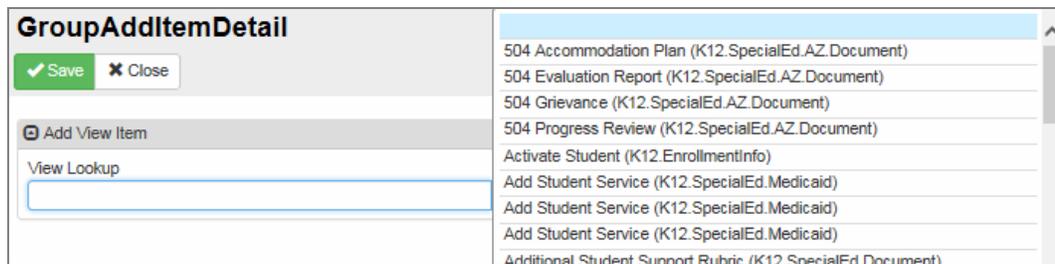
GroupAddLinkDetail Screen

- To add a report:
  - a. Select *Add Report to 'Group Name'* from the **Actions** menu. The GroupAddReportItemDetail screen displays.
  - b. Select a report from the **ReportLookup** drop-down.
  - c. Click **Save**.



*GroupAddReportItemDetail Screen*

- To add a view:
  - a. Select *Add View to 'Group Name'* from the **Actions** menu. The GroupAddItemDetail screen displays.
  - b. Select a view from the **View Lookup** drop-down.
  - c. Click **Save**.



*GroupAddItemDetail Screen*

- To delete the group:
  - a. Select *Delete 'Group Name'* from the **Actions** menu.
  - b. Click **Yes** to the Confirm dialog.

5. Click **Move Up** or **Move Down** to change the view order of the items.

The screenshot shows the 'User Profile' interface for a user named 'Admin'. The 'Navigation Menu' tab is active, displaying a tree view of menu items on the left and a 'Set Item Order' table on the right. The table has columns for 'X', 'Line', 'View Type', and 'Name'. Below the table are 'Move Up' and 'Move Down' buttons.

X	Line	View Type	Name
<input type="checkbox"/>	1		PAD Security
<input type="checkbox"/>	2		GBAdminLogin
<input type="checkbox"/>	3		Nursing Plan
<input type="checkbox"/>	4		Mail Merge District Definition
<input type="checkbox"/>	5		Staff
<input type="checkbox"/>	6		Organization
<input type="checkbox"/>	7		Student
<input type="checkbox"/>	8		Streams
<input type="checkbox"/>	9		User
<input type="checkbox"/>	10		UserGroups
<input type="checkbox"/>	11		System Config

User Profile Screen

6. Click **Save**.



To delete an item in the group, check the box in the X column and click **Save**.

## Security Access Tab

The **Security Access** tab displays some of the security assigned to your account. You probably cannot change this information.

The screenshot shows the 'User Profile' screen with the 'Security Access' tab selected. The user information is 'User Name: User, Admin' and 'Login Name: Admin'. The 'Security Access' tab is highlighted with a red box. Below the tab, there are several sections: 'Focus' with dropdowns for Focus Year Selection (2015-2016), Focus Organization (Hope High School), and Show Inactive Students (Active And Inactive); 'Year Extensions' with checkboxes for Night, Regular, and Summer; 'Security Settings' with dropdowns for Discipline Security (Highest), Discipline Organization Security, Conference Visitation (Highest), Allow Override of Max Students in Class, and Teacher/VUE Administrator (Yes); 'Organization Year Access' with dropdowns for Previous Year(s) Permission, Current Year Permission, and Next Year(s) Permission; 'Organizations' table with one row for 'Edupoint School District'; and 'User Groups' table with two rows: 'Role - Admin' and 'Update - District'.

User Profile Screen, Security Access Tab

## Spell Check Options Tab

Use the **Spell Check Options** tab to select to ignore spell check types and to add words to the standard dictionary. For example, adding the name of the district and/or schools.

The screenshot shows the 'User Profile' screen with the 'Spell Check Options' tab selected. The user information is 'User Name: User, Admin' and 'Login Name: Admin'. The 'Spell Check Options' tab is highlighted with a red box. Below the tab, there are two sections: 'Options' with checkboxes for Ignore All-Capital Words, Ignore First-Capital Words, Ignore Mixed-Capital Words, Ignore Mixed-Digit Words, Ignore Hyphenated Words, Ignore Repeat Words, Ignore Filenames, Ignore HTML Tags, and Ignore Internet Addresses; and 'Custom Word List' with an 'Add' button and a table with one row for 'Edupoint'.

User Profile Screen, Spell Check Options Tab

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **Spell Check Options** tab.
3. Select the **Options** to ignore types of spell check.

4. Add custom words:
  - a. Click **Add** under the Custom Word List. A new line appears.
  - b. Type the new **Word**.



To delete a custom word, check the box in the **X** column.

5. Click **Save**.

## POV Tab

Use the **POV** tab to define what displays on the home screen when you launch Synergy SIS.

- Announcements
- Tasks grid
- Widgets

**Good Afternoon, Admin User**

Hide Dismissed Messages

**Announcements**

Urgency	Organization Name	Announcement	Dismiss or Recall Message
	Edupoint School District	new announcement in classic mode	
	Edupoint School District	Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.	

**Tasks**

Task Date/Time	Name	Description	Action
11/30/2015 12:46 PM	MacDonald, Ruth L.	Workflow: Waiting for response to step 'When practical, perform informal meeting with student' in workflow 'Suspension Process' started on 01/05/2016.	
01/05/2016 1:34 PM	Aaron, Ian	PVUE Updates	

**Local Date/Time**  
**Wednesday, February 10, 2016**  
 4:17:41 PM MST

**Weather: Fountain Valley, AZ**

Now	Today	Tonight	Tomorrow
81°	79° 48° 79°	48°	78° 42° 78°

**Daily Absence Count**

1039

**Kennedy Space Center - Channel 4**

Last Update: 01/26/2016 12:18:00

Last Update: 02/05/2016 08:48:00

Home Screen



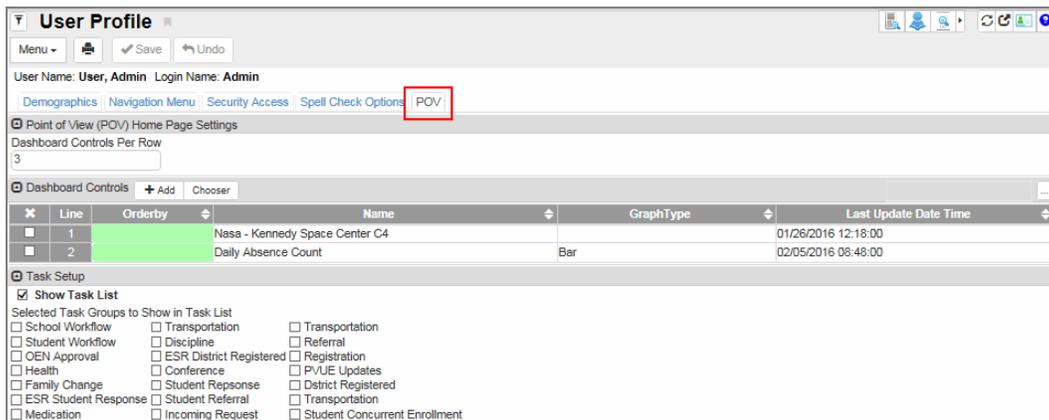
Some items that display on the home screen are selected by the administrator.

## Dashboard Controls

A dashboard control or widget is a graphical reporting tool designed to track student data trends or link to external web-based sources. The widgets that you can select are set up by your system administrator. These widgets:

- Appear on the Synergy SE home screen to give the users an overview of different trends occurring in either the school or the district.
- Can track enrollments by day, attendance patterns, or grades.

## Add Widgets

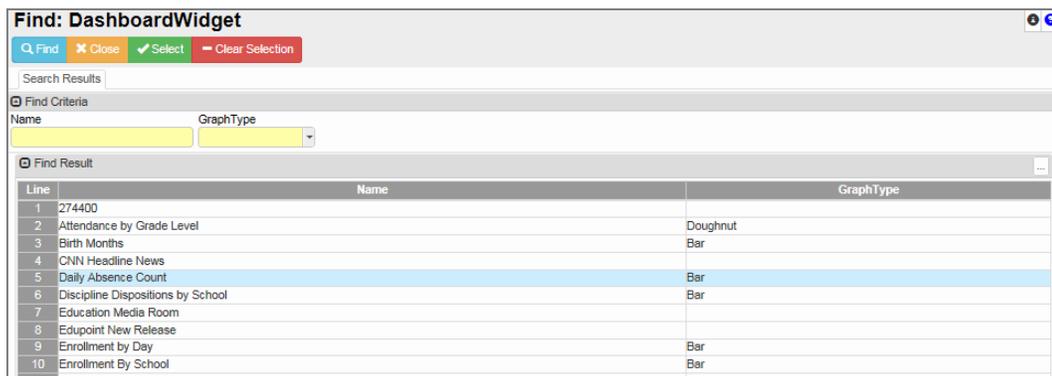


*User Profile Screen, POV Tab*

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **POV** tab.
3. Enter the number of columns to contain the widgets in **Dashboard Controls Per Row** text box.

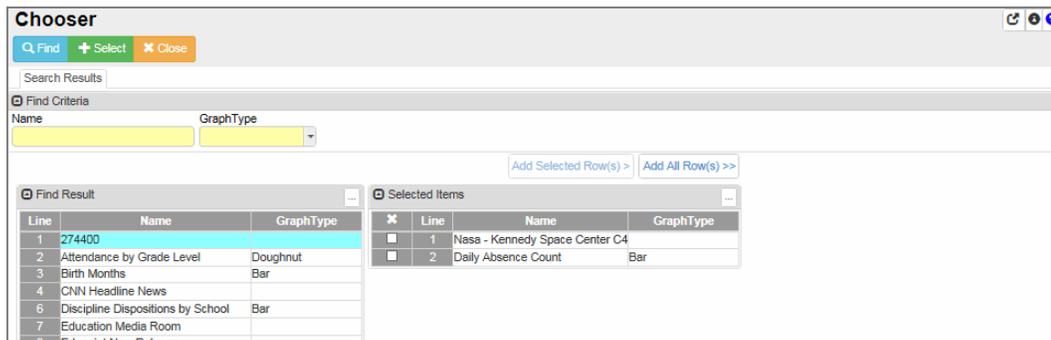
 An RSS Feed widget always takes the entire row regardless of the columns selected.

4. Add widgets:
  - To add a single widget, click **Add**. The Find: DashboardWidget screen displays.



*Find: DashboardWidget Screen*

- To add multiple widgets, click **Chooser**. The Chooser screen displays.

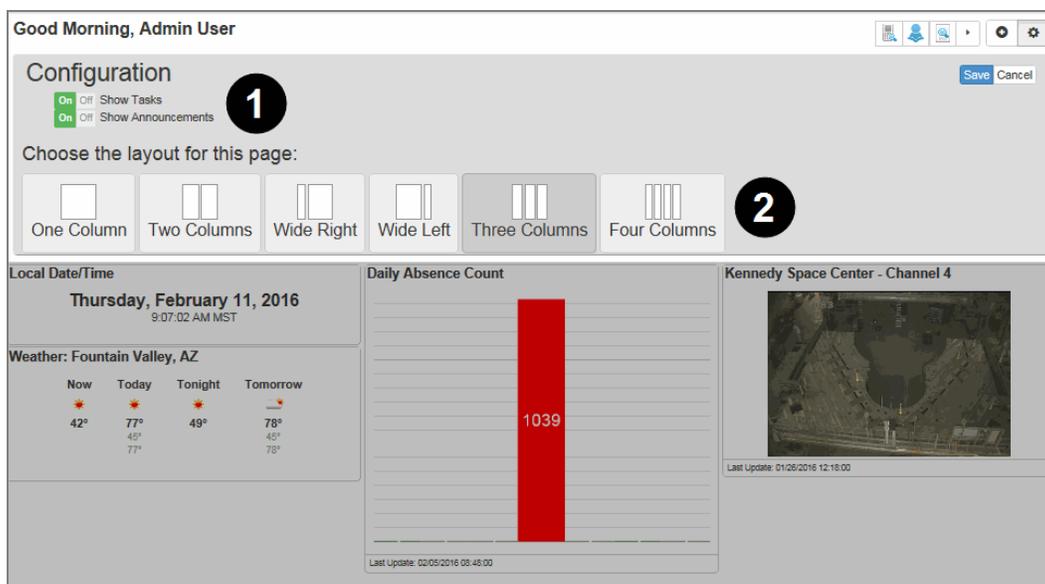


Chooser Screen

- Find and select the widgets.
- Click **Select**. The widgets are added to the home screen.

## Managing Widgets on the Home Screen

### Screen Layout

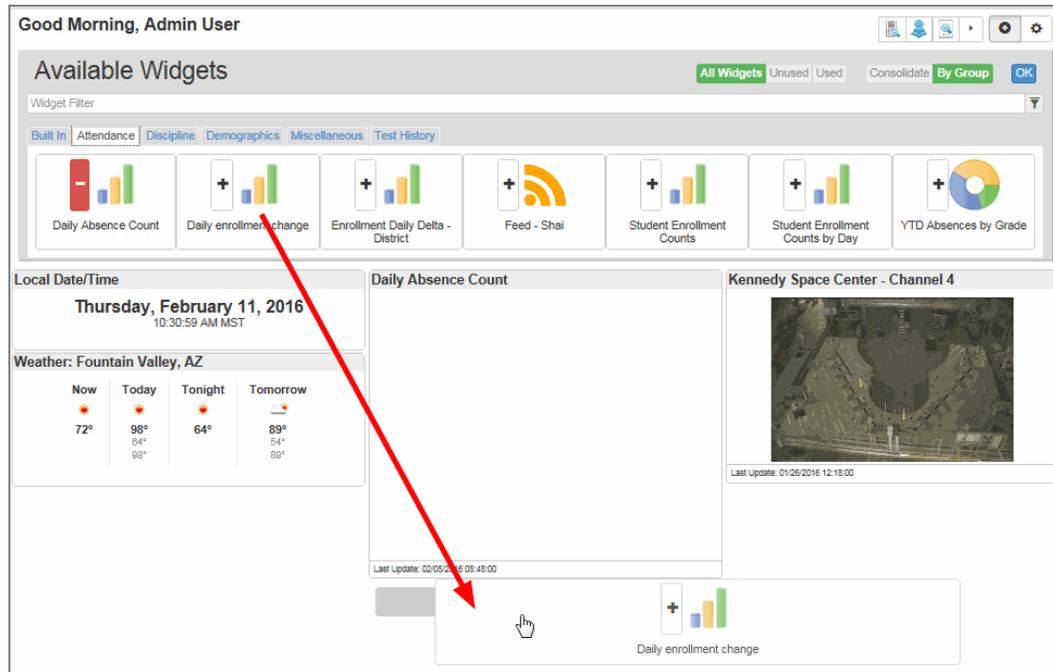


Dashboard Configuration Screen

- Click . The Configuration screen displays.
- Make selections:
  - Use the toggle to **Show Tasks** and/or **Show Announcements**. ❶
  - Choose the layout for the page by selecting a column layout. ❷
- Click **Save**.

### Adding Widgets from Home Screen

1. Click . The Available Widgets screen displays arranged by tabs.
2. Select an Available Widget and drag it to a column.
3. Click **OK**.



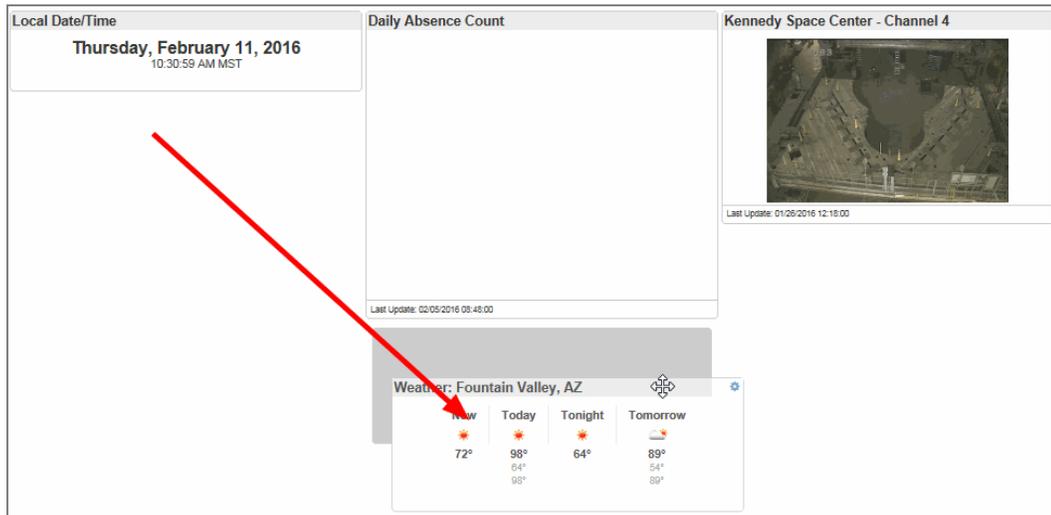
Home Screen, Widget Dashboard

 Click **Consolidated** to see all available widgets.

### Moving Widgets on Home Screen

To move a widget:

1. Click . The Available Widgets screen displays.
2. Select the widget header and drag it to the shaded area in the column.
3. Click **OK**.

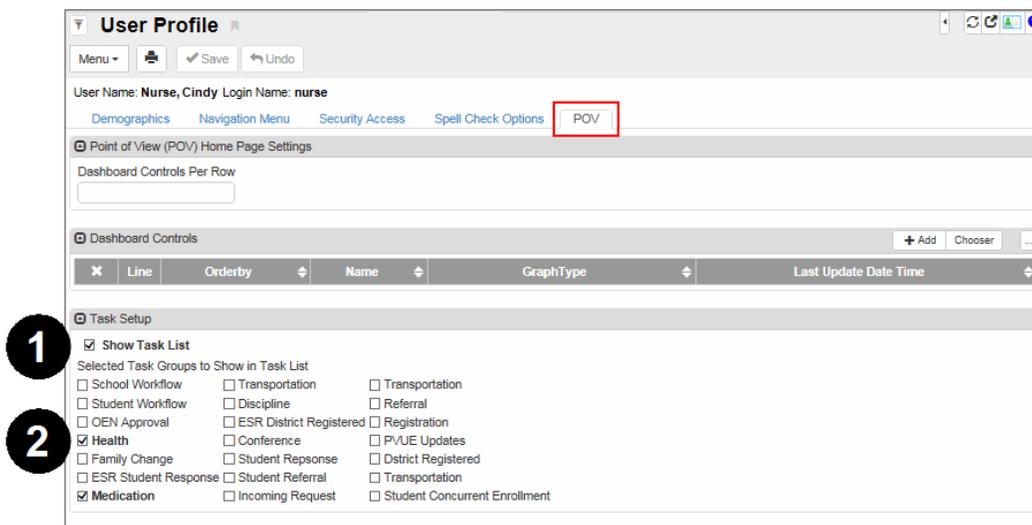


Home Screen, Widget Dashboard

## Tasks

Tasks provide a to-do list on the Synergy SE home page. For example, a task may be listed to remind a school nurse when to administer medication to a student or a counselor may have conference reminders.

Tasks that are displayed vary upon the user's group and individual user preferences. The tasks are generated once a day.



User Profile Screen, POV Tab

## Display Task List

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **POV** tab.
3. Select the **Show Task List** option. ❶
4. Select the desired tasks to display using the checkboxes. ❷
5. Click **Save**.

# Chapter 3: Managing Students

---

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<b>Adding a Current Synergy SE Student to Your Portfolio</b> .....	<b>57</b>
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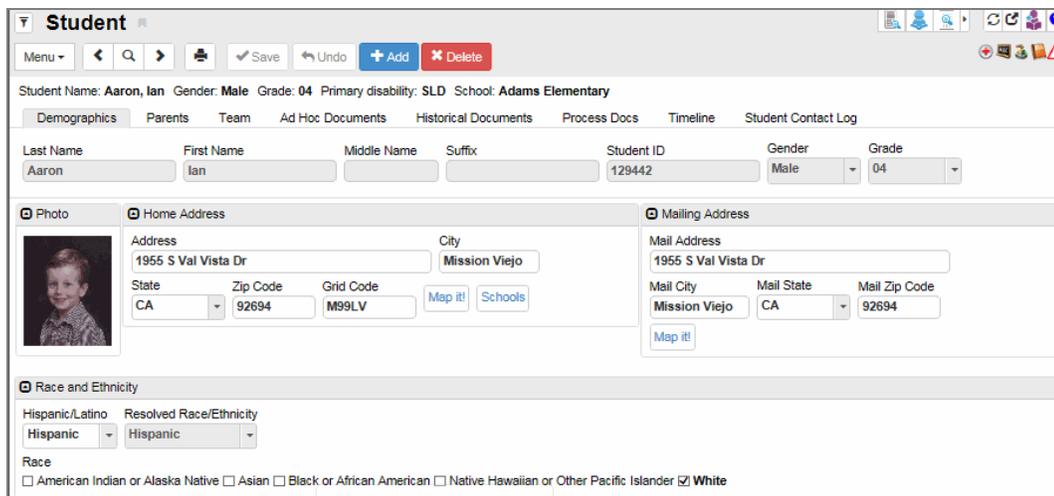
## Overview

Synergy SE documents and special education student data are accessed from the SE Student screen or the Portfolio screens.

 In some districts the SE Student screen is called the Student screen.

## SE Student Screen

- Provides school administrators and secretaries, who do not belong to a student's team, access to special education student data.
- Displays individual student records.
- Displays [student notifications](#).
- Has multiple tabs that contain the student information. The student's Name, Student ID, Gender, and Grade appear on every tab.
- Access from **Synergy SE > Student > SE Student** or **Student**



**Student**

Menu | Save | Undo | Add | Delete

Student Name: **Aaron, Ian** Gender: **Male** Grade: **04** Primary disability: **SLD** School: **Adams Elementary**

Demographics | Parents | Team | Ad Hoc Documents | Historical Documents | Process Docs | Timeline | Student Contact Log

Last Name: Aaron | First Name: Ian | Middle Name: | Suffix: | Student ID: 129442 | Gender: Male | Grade: 04

**Photo** **Home Address** **Mailing Address**

Address: 1955 S Val Vista Dr | City: Mission Viejo

State: CA | Zip Code: 92694 | Grid Code: M99LV | Map it! | Schools

Mail Address: 1955 S Val Vista Dr

Mail City: Mission Viejo | Mail State: CA | Mail Zip Code: 92694 | Map it!

**Race and Ethnicity**

Hispanic/Latino: Hispanic | Resolved Race/Ethnicity: Hispanic

Race:  American Indian or Alaska Native  Asian  Black or African American  Native Hawaiian or Other Pacific Islander  White

SE Student Screen, Demographics Tab

## Demographics Tab

The **Demographics** tab contains group boxes that display the data imported from Synergy SIS or a district's student information system database.



Based on a user's security setup, some group boxes or data fields are hidden or are view only.

The student information on the **Demographics** tab includes such information as the student's address, phone numbers, and immigration status.

Some of the information is imported into the special education documents. These fields include:

- Primary Language
- Home Language
- Primary Language Date
- Home Language Date
- School of Attendance
- School of Residence

## Parents Tab

The **Parents** tab contains a grid that lists:

- The student's relationships.
- The people the student lives with is indicated by the **Lives With** checkbox.

Student											
Student Name: <b>Abbott, Billy C.</b> Gender: <b>Male</b> Grade: <b>12</b> Primary disability: School: <b>Kennedy High School</b>											
Demographics <b>Parents</b> Team Ad Hoc Documents Historical Documents Process Docs Timeline Student Contact Log											
Last Name		First Name		Middle Name		Suffix		Student ID		Gender	Grade
Abbott		Billy		C				905483		Male	12
Parent/Guardian											
Line	Order	Lives With	Relation	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Deceased
1		<input type="checkbox"/>	Foster Father	Washington, Georges			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	Grandmother	Smith, Adam	Home	480-555-0893	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3		<input type="checkbox"/>	Mother	Renflow, Ken			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	1	<input checked="" type="checkbox"/>	Mother	Aaron, Kathleen	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	2	<input checked="" type="checkbox"/>	Father	Aaron, Phillip	Cell	480-555-6767	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Student Screen, Parents Tab

- Select the **Parent Name** link to open the Parent screen with more information about the person.

Parent Screen

## Team Tab

The **Team** tab displays the student's special education team members. Users who [belong to a student's team list](#) see that student displayed in their [Portfolio screen](#).

The team list imports into several special education documents such as an eligibility determination document.

Line	Staff Name	Role	Email
1	Horn, Cissy	Case Carrier	amanda.greene-chacon@springfield.k12.zz.us
2	User, Admin	Special Ed Teacher	lee.test@edupoint.com

Student Screen, Team Tab

## Ad Hoc Documents Tab

The **Ad Hoc Documents** tab contains miscellaneous special education documents which are not required process documents. These documents include that can be edited as well as print only documents. They contain standard headers with the student demographic information.



See the *Synergy SE – Documents Guide* for your state for more information on Ad Hoc documents.

Line	Document Date	Document ID	Document Name	Action
1		GENAZ 30	Classroom Observation	Edit

Line	Document ID	Document Name	Action
1	GENAZ 30	Classroom Observation	Create
2	GENAZ 31	Conference Summary	Create
3	GENAZ 32	Consultation Request	Create

Student Screen, Ad Hoc Documents Tab

## Historical Documents Tab

The **Historical Documents** tab displays a list of Synergy SE documents that have been created and finalized.



See the *Synergy SE – Documents Guide* for your state for more information on historical documents.

- The Historical Documents grid is a virtual file cabinet that stores the student's historical records.
- The Attached Documents grid allows a user to attach any miscellaneous document or file that is necessary to store in the student's historical file.

Line	Start Date	End Date	Process Name	Documents
------	------------	----------	--------------	-----------

Line	Date	Category	Comment	Document
------	------	----------	---------	----------

Student Screen, Historical Tab

## Process Docs Tab



If your district uses concurrent SPED and 504 processes, the **SpEd Docs** tab displays.

The **Process Docs** tab displays the documents related to a process. Some information may be edited but other information is view only.

- **Current Settings** contains:
  - **IEP Review Due Date** is the date the next IEP is due and it is generated or updated each time the IEP is finalized.
  - **Reevaluation Due Date** is the date the next evaluation is due and it is generated or updated each time the eligibility determination document is finalized.
  - **Current IEP** opens a view only copy of the student's current IEP that has been finalized (locked).
  - **Progress Report** opens the student's current progress report for updating.
  - **Current BIP** opens a view only copy of the student's current BIP that has been finalized (locked).
  - **ESY Progress Report** opens the student's current ESY Progress report for updating.
  - **Current BIP Date** is the date of the current BIP.
  - **Next BIP Date** is the date of the next BIP is due.
  - **Disabilities** is pulled from the eligibility determination documents.
  - **Exit Date, Exit Reason, and Exit Explanation** is pulled from the [Exit Process](#) when a student exits from special education because they no longer need services or they move out of the district.
  - **Medicaid Consent Status and Medicaid Consent Status Date** is pulled GENAZ 520 document or the **Medicaid** tab of the IEP.
  - **Referral Date** is the date the student was referred to special education.
- **Current 504 Settings** contains :
  - **504 Review Date** is the date the 504 review was held
  - **504 Reevaluation Date** is the date for the next 504 evaluation.
  - **Exit Date 504, Exit Reason 504, and Exit Explanation 504** is pulled from the [Exit Process](#) when a student exits from the 504 process because they no longer need services or they move out of the district.
- **Process Documents** contains documents specific to the current process the student is in. The documents are:
  - Represented by [color coded icons like in the Portfolio screen](#) that indicate the status.
  - Available for creating, viewing or editing, depending on user security.
- **Attached Documents** contains any Word or PDF documents the team wants to associate with the process.

- Manual Process Move is available to [manually move a student to another process](#).

**Student** [Icons]

Menu  Save Undo **+ Add** **✖ Delete**

Student Name: Adair, Kaylee E. Gender: Female Grade: 10 Primary disability: Severe Multiple Impairment School: Clarkston Junior High

Demographics Parents Team Ad Hoc Documents Historical Documents **Process Docs** Timeline Student Contact Log

Last Name: Adair First Name: Kaylee Middle Name: Elaine Suffix: Student ID: 2020581 Gender: Female Grade: 10

**Current Settings**

IEP Review Due Date: 02/01/2017 Re-evaluation Due Date: 01/01/2016

Primary Disability: Severe Multiple Impairment Preschool Primary Disability: [Dropdown]

Secondary Disabilities: [Text Area] Preschool Secondary Disabilities: [Text Area]

Exit Date: [Dropdown] Exit Reason: [Dropdown] Exit Explanation: [Text Area]

Medicaid Consent Status: [Dropdown] Medicaid Consent Status Date: [Date Picker]

Referral Date: [Date Picker]

**Current 504 Settings**

504 Review Date: [Date Picker] 504 Re-evaluation Date: [Date Picker]

Exit Date 504: [Date Picker] Exit Reason 504: [Dropdown] Exit Explanation 504: [Text Area]

**FTE Multiplier**

Oct Snapshot Date: [Date Picker] Oct FTE Multiplier: [Text Input]

Feb Snapshot Date: [Date Picker] Feb FTE Multiplier: [Text Input]

Current Process: Annual Review

**Process Documents**

Line	Name	Status	Doc
1	Invite - Invitation Letter	Skipped	▲
2	IEP	In Progress	●

**Attached Documents** Show Detail + Add

Line	Date	Category	Comment	Document

**Manual Process Move**

Move To: [Dropdown] Move To: [Dropdown] **Move** **Exit Process**

Student Screen, Process Docs Tab

## Timeline Tab

The **Timeline** tab displays progress toward district-established deadlines.

- Green text indicates deadlines met.
- Red text indicates deadlines are overdue.
- Gold text indicates future deadlines.
- A Black line indicates the current date.

The Timeline can be set at 3, 6, 12, or 36 month intervals at user option.

The screenshot shows the 'Student' interface for Aaron, Ian. The 'Timeline' tab is selected. The chart displays several deadlines: 'Parent Notice' (12/08/2011) in green, 'Parent Response' (12/15/2011) in red, 'Today' (1/10/2012) in black, 'MET' (02/06/2012) in gold, and 'IEP Date' (02/16/2012) in gold. Below the chart, the interval is set to '12 Months'. A table below shows the current events:

Line	Event	Completion Date	Projected Due Date	Num Days Overdue	Calculated with Type
1	MET		09/06/2017		Calendar Days
2	IEP Date		11/22/2015		Calendar Days
3	Eligibility				
4	Triennial Reevaluation		09/11/2017		

Student Screen, Timeline Tab



## Portfolio Screen

- Provides teachers, therapists, and other service providers who are members of the student's team list access to student's special education data.
- Displays the user's caseload at a glance. The students may be filtered by **Name**, **Grade**, **A-R Date**, **R-E Date**, or **Role**.
- Displays links to navigate to the student's documents as well as other special education screens.
- The icons indicate the following:
  -  – Complete
  -  – Skipped
  -  – In Progress
  -  – IEP Amendment in Progress
  -  displays to indicate the **Next IEP Date** or **Next Eval Date** is almost due.
  -  displays to indicate the **Next IEP Date** or **Next Eval Date** is overdue.
- Access from **Synergy SE > Student > Portfolio**.

**Portfolio** Menu + Add SIS

Portfolio

Sort: Name  Role  Save Default Reset Saved Default

Initial Evaluation							Process Docs					
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs		CON	E	MET	IEP	PWN	MED
1	Abbott, Billy	11	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>							

Transfer							Process Docs	
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs			
1	Armada, Sandra	03	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>			

Gifted Only										Process Docs					A-R Date
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	IEP	Prg	CON	E	IEP	PWN	MED			
1	Abbott, Ian	02	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>										

Private School Evaluation												A-R Date	R-E Date
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	Prg	Process Docs						
							CON	E	MET	SP	PWN		
1	Aaron, Theresa	07	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>								06/30/2020
2	Jack, Chris	08	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">View</a>								

Portfolio Screen

## Admin Student Portfolio Screen

- Provides administrators or case managers the ability to view and manage upcoming events without being added to all student teams.
- Displays all students in special education for the current focus. This screen may be filtered by **Staff**, **Roles**, **Primary Disability**, **Days to Next IEP Date**, or **Days to Next Eval Date**.
- Displays the student's current IEP and Progress Report and the **Next IEP Date** and **Next Eval Date**.
-  displays to indicate the **Next IEP Date** or **Next Eval Date** is almost due.
-  displays to indicate the **Next IEP Date** or **Next Eval Date** is overdue.
- Access from **Synergy SE > NTL > Admin Student Portfolio**.

**Admin Student Portfolio**

Menu ▾

Good evening

Portfolio

Filter Options

Staff:  Roles:  Primary Disability:  Days to Next IEP Date:  Days to Next Eval Date:

Sort: Name ▾

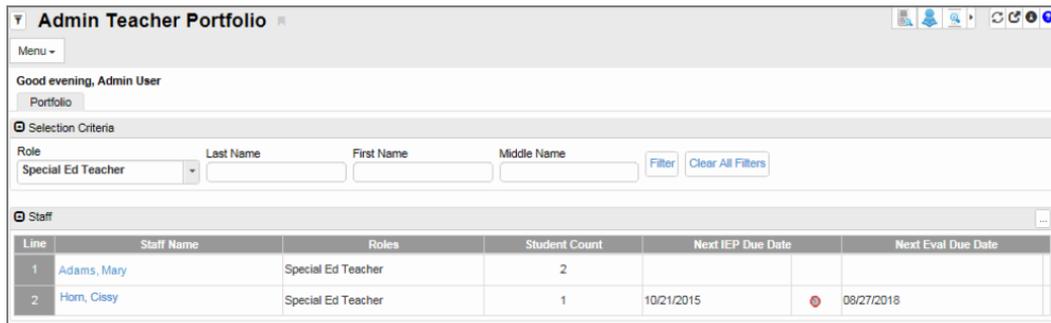
Students

Line	StudentName	Grade	Disability	Team	Historical Docs	IEP	Prg	Next IEP Date	Next Eval Date
1	Aaron, Theresa	11	AUTISM	<a href="#">Edit</a>	<a href="#">View</a>				
2	Abbott, Billy	11	SPECIFIC LEARNING DISABILITY	<a href="#">Edit</a>	<a href="#">View</a>			03/16/2018	03/16/2020
3	Abbott, Ian	12	SPECIFIC LEARNING DISABILITY	<a href="#">Edit</a>	<a href="#">View</a>			01/26/2017 	
4	Armada, Sandra	09	SPECIFIC LEARNING DISABILITY	<a href="#">Edit</a>	<a href="#">View</a>			02/07/2018	
5	Jack, Chris	10	SPECIFIC LEARNING DISABILITY	<a href="#">Edit</a>	<a href="#">View</a>			02/06/2018	02/02/2018

Admin Student Portfolio Screen

## Admin Teacher Portfolio Screen

- Provides a user, who does not need to be a member of the special education team, access to a special education staff member's Portfolio screen and the associated student data.
- Displays Synergy SE users in special education for the current focus and selected filters. The screen must be filtered by **Role**, **Last Name**, **First Name** or **Middle Name**.
- Displays the **Staff Name**, **Role**, **Student Count**, **Next IEP Due Date**, and **Next Eval Due Date** for the filtered users.
-  displays to indicate the **Next IEP Date** or **Next Eval Date** is almost due.
-  displays to indicate the **Next IEP Date** or **Next Eval Date** is overdue.
- The staff name is a link to that person's Portfolio screen. Once the Portfolio screen is open, Process Documents may be edited or finalized as needed.
- Access from **Synergy SE > NTL > Admin Teacher Portfolio**.



Line	Staff Name	Roles	Student Count	Next IEP Due Date	Next Eval Due Date
1	<a href="#">Adams, Mary</a>	Special Ed Teacher	2		
2	<a href="#">Horn, Cissy</a>	Special Ed Teacher	1	10/21/2015	 08/27/2018

Admin Teacher Portfolio Screen

## Adding Students From Synergy SIS

Your Portfolio displays all students for which you are a Team Member. If you wish to import a new or referred student from Synergy SIS and set up their team, use the Portfolio view.



An initial process on the student must be completed to transfer them into Synergy SE.

To import a student and their demographic information to Synergy SE from Synergy SIS:

1. Navigate to **Synergy SE > Student > Portfolio**.

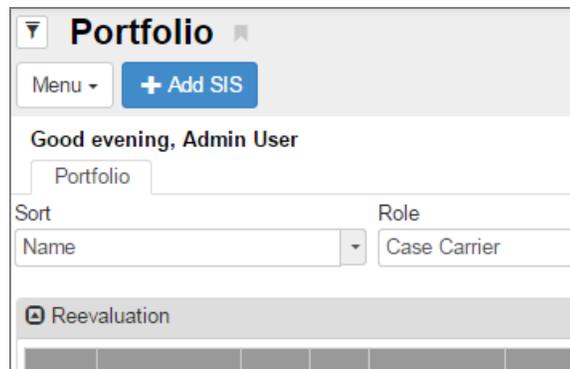


When you log in to Synergy SE the first page that displays is the Portfolio.



Student can also be added from the **Synergy SE > Student > Student** screen using the **Add** button.

2. Click **ADD SIS**.



*Portfolio Screen*

3. Find and select the student.
  - Specify the **Initial Process** for the student.
  - Select the **Enter Date** using .



Synergy SE returns only the first 50 students who match your search criteria. If the student does not display in the search, use partial last name with partial first name as a search combination.

Students with a status of **Yes** in the In Special Ed column cannot be added.

4. Click **Transfer**.

**Student SIS Number Find**

Find Close Transfer

Selection Criteria (Searching Student Information System)

Last Name First Name Gender Grade Student Number

bobby

Find Students

Transfer Info

Initial Process Initial 504 Process

EnterDate

Students

Line	Student Name	Birth Date	Gender	Grade	Student Number	Current School	In Special Ed	Current Process
1	Corral, Bobby F.	08/30/2004	Male	05	985827	Adams Elementary		
2	Pfost, Bobby M.	07/28/2003	Male	06	126237	Adams Elementary		
3	Ruelas, Bobby	05/14/2007	Male	02	129776	Adams Elementary		

Student SIS Number Find Screen

5. Click **OK**.

## Adding a Current Synergy SE Student to Your Portfolio

To add a current Special Ed student to your Portfolio, you [must be added to the student's Team tab](#).



If another Team Member adds you to the student's Team, the next time you log into Synergy SE, the student displays in your Portfolio.



If the student cannot be located, contact the Synergy SE Help Desk for assistance.

## Accessing and Editing Student Data and Information

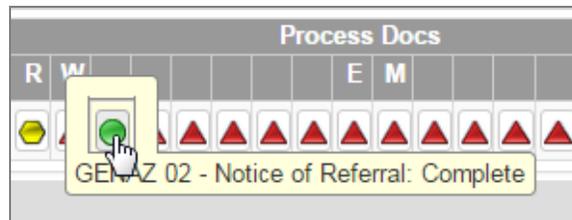
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	BIP	Process Docs					
							R		RED	M	E	IEP
1	Aaron, Ian	03	Edit	Edit	View		▲	▲	▲	▲	▲	▲
2	Abbott, Billy	11	Edit	Edit	View		▲	▲	▲	▲	▲	▲

Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	BIP	IEP	Prg	Process Docs		A-R Date	R-E Date
									IEP			
1	Brown, Amy	06	Edit	Edit	View	BIP	IEP	PRG	▲	▲	02/28/2018	06/14/2017
2	Duggas, Johnny	09	Edit	Edit	View		IEP	PRG	▲	▲	04/30/2018	04/30/2020

Portfolio Screen

- Select the student's name to view/edit demographic data. ①
- Click **Edit** in the Team column to [add or remove team members](#). ②
  - Editing student data is based on your security level.
  - Removing yourself from the Team, removes the student from your Portfolio.
- Click **Edit** to edit Ad Hoc Documents. ③
- Click **View** to view Historical Documents. ④
- Click  to view the IEP (Individualized Education Program) document. ⑤
- Click  To view the student's Progress Report. ⑤
- Process Documents: ⑥
  - Hover over the icon to view the status.



Portfolio Screen

- Click the icon to view the Process Document.

- The icons indicate the following:

 – Complete

 – Skipped

 – In Progress

 – IEP Amendment in Progress

 displays to indicate the **Next IEP Date** or **Next Eval Date** is almost due.

 displays to indicate the **Next IEP Date** or **Next Eval Date** is overdue.

## Viewing a Student's Timeline

The **Timeline** tab displays progress toward district-established deadlines.

- Green text indicates deadlines met.
- Red text indicates deadlines are overdue.
- Gold text indicates future deadlines.
- A Black line indicates the current date.

The Timeline can be set at 3, 6, 12, or 36 month intervals at user option.

**Student**

Menu - Save Undo

Student Name: Aaron, Ian Gender: Male Grade: 04 Primary disability: SLD School: Adams Elementary

Demographics Parents Team Ad Hoc Documents Historical Documents Process Docs **Timeline** Student Contact Log

Last Name: Aaron First Name: Ian Middle Name: Suffix: Student ID: 129442 Gender: Male

Grade: 04

Timeline Chart: Today 1/19/2012. Events: Parent Notice 12/20/2011 (Green), Parent Response 12/16/2011 (Red), MET 02/06/2012 (Gold), IEP Date 02/16/2012 (Gold).

09/23/2015 12 Months Redraw Timeline

Line	Event	Completion Date	Projected Due Date	Num Days Overdue	Calculated with Type
1	MET		09/06/2017		Calendar Days
2	IEP Date		11/22/2015		Calendar Days
3	Eligibility				
4	Triennial Reevaluation		09/11/2017		

Student Screen, Timeline Tab

## Student Contact Log

The **Student Contact Log** tab contains any contact log entries made from the Synergy SIS Student, Synergy SE, or Health screens.

- The General Ed Student Contact Log grid which contains entries from Synergy SIS is view only.
- Team members can record entries in the Special Ed Student Contact Log grid that is not visible in Synergy SIS.

The screenshot shows the 'Student' interface for Aaron, Ian. The 'Student Contact Log' tab is selected. Below the student details, there are two contact log grids. The first is the 'General Ed Student Contact Log' with one entry: Line 1, Date 04/15/2015, Time 2:15 PM, Contact Type Phone, Person Contacted Mrs. Aaron, Contact By Mr. Jones - Librarian, Outcome Made Contact, Comment Contacted parent regarding overdue library book. The second is the 'Special Ed Student Contact Log' with one entry: Line 1, Date 09/24/2015, Time 4:15 PM, Contact Type Phone, Person Contacted Mrs. Aaron, Contact By Natalie Carroll, Outcome Left, Comment Contacted parent regarding testing for language skills.

Student Screen, Student Contact Log Tab

To create a log entry:

1. Click **Add**. A new line displays.

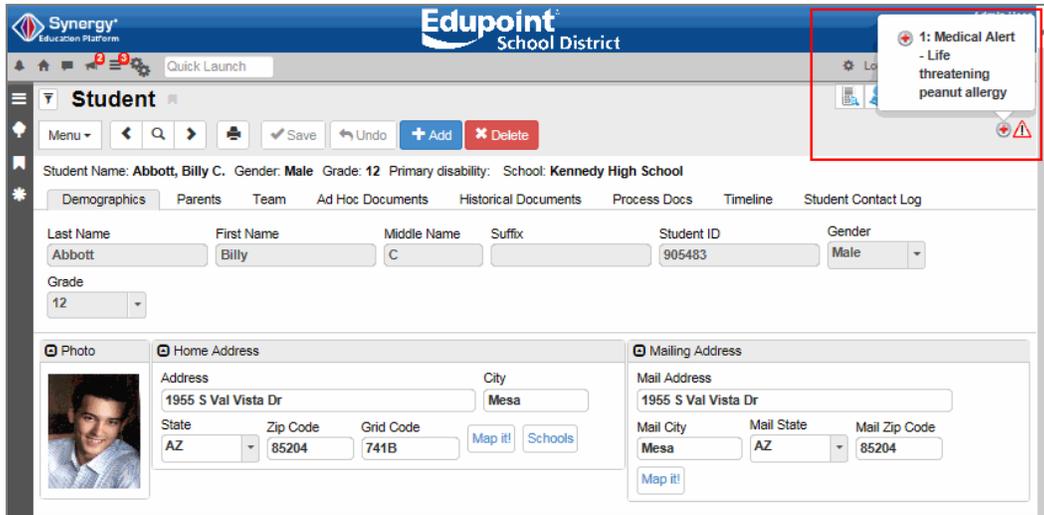
The screenshot shows the 'Special Ed Student Contact Log' grid. It has two lines. Line 1 is the same as in the previous screenshot. Line 2 is a new, empty entry with a text input field in the Date column and a dropdown arrow in the Contact Type column.

Student Screen, Student Contact Log Tab

2. Complete the fields using drop-down where available.
3. Click **Save**.

## Student Notifications

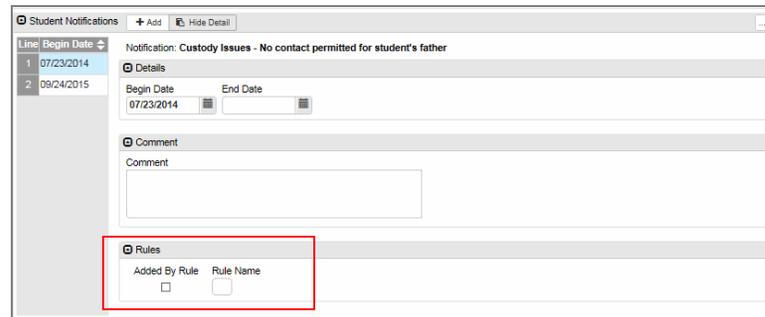
Administrators create student notifications to alert staff about special types of student circumstances. The student notification icons display on any screen when the student is in focus. Hover over the icon to view the notification.



Student Screen

- To delete a notification: ❶
  - a. Select the checkbox in the **X** column.
  - b. Click **Save**.
- To add a new notification: ❷
  - a. Click **Add**. A new row displays with the **Begin Date** set to today's date.
  - b. (Optional) Change the **Begin Date** using the calendar icon.
  - c. Select the type of **Notification**.
  - d. (Optional) Enter a **Comment** in the text box.
  - e. (Optional) Enter an **End Date** using the calendar icon if the condition is temporary.
  - f. Click **Save**.

Click **Show Detail** to view if the notification was generated by a Rule set up in Synergy SIS. The Rules section displays that it was added by a rule and includes the name of the rule.



Student Notification Screen, Detail

## Manually Moving a Student to Another Process

Depending on your access level rights, you may manually move a student to another process.

1. Select a student on the Portfolio screen.
2. Select the **Process Docs** tab.
3. Finalize or delete any in-process documents.



In-process documents are indicated by .

**Student**

Menu - Save Undo

Student Name: Aaron, Ian Gender: Male Grade: 04 Primary disability: SLD School: Adams Elementary

Demographics Parents Team Ad Hoc Documents Historical Documents Process Docs Timeline Student Contact Log

Last Name: Aaron First Name: Ian Middle Name: Suffix: Student ID: 129442 Gender: Male

Grade: 04

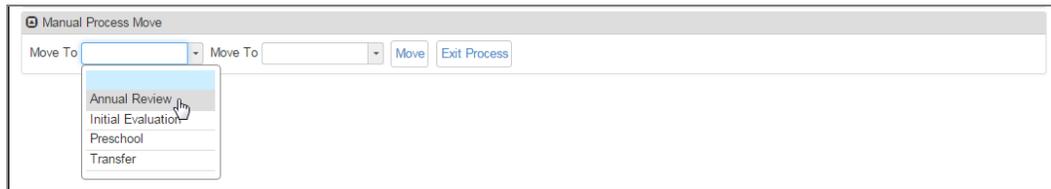
Current Process: Reevaluation

Line	Name	Status	Doc
1	GENAZ 01 - Referral	In Progress	
2	GENAZ 15 - Notice of Reeval Waiver	Skipped	
3	GENAZ 02 - Notice of Referral	Complete	
4	GENAZ 03 - Parent Input	Skipped	
5	GENAZ 17 - Notice of Reevaluation Decision	Skipped	
6	GENAZ 18 - Notice of Triennial	Skipped	

Feedback

Student Screen

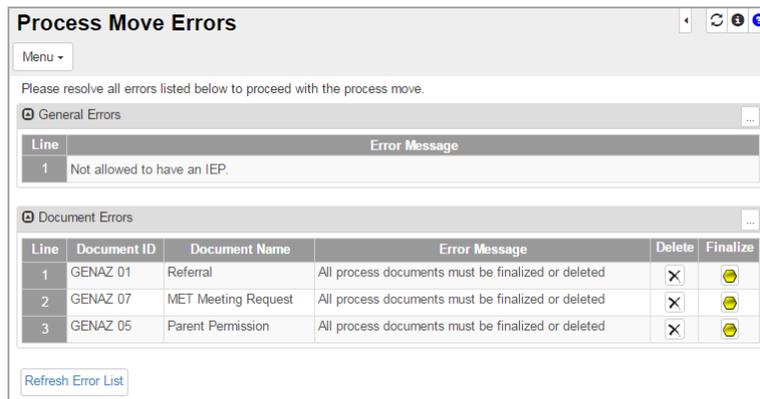
4. Select a **Move To** process in the Manual Process Move grid.



Student Screen

5. Click **Move**.

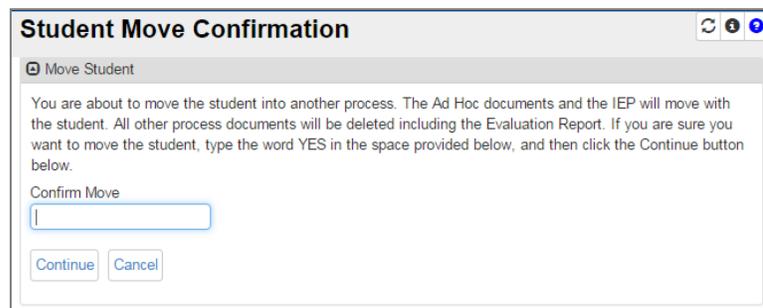
- If there are no errors, a confirmation dialog displays. Go to next step.
- If you have not finalized or deleted all in-process documents, an error notice displays.
  - a. Click on each icon in the list to **Finalize** required documents or **Delete** the miscellaneous documents.
  - b. Click **Refresh Error List**.



Process Move Errors Screen

6. Type **YES** to **Confirm Move**

7. Click **Continue**. The student moves to the new process in the Portfolio.



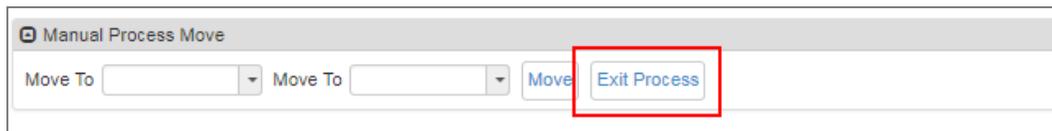
Student Move Confirmation

## Exiting a Student from Special Education

Use the Exit Process when a student no longer requires 504 or special education services or they move out of the district.

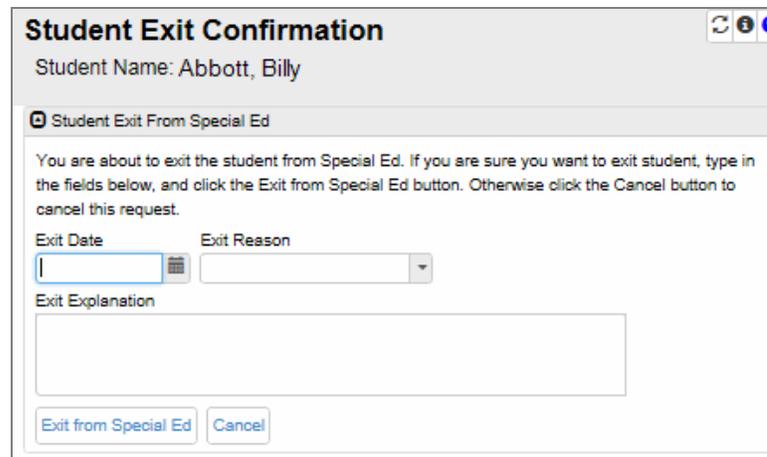
 No draft documents indicated by  are allowed when exiting a student from Special Education.

1. Find and select the student. The Student screen displays.
2. Select the **Process** tab.
3. Click **Exit Process** under Manual Process Move.



*Student Screen, Process Tab*

The Student Exit Confirmation dialog displays.



*Student Exit Confirmation Screen*

4. Select an **Exit Date** using the calendar icon.
5. Select an **Exit Reason**.
6. Enter a **Exit Explanation** in the text box.
7. Click **Exit from Special Ed**. The record of the last case manager is copied to **Last Special Education Case Manager** on the **Team** tab.

 If the district uses the **Transfer IEP Data to SAIS**, the **Exit Date** and **Exit Reason** populate in the Special Ed Student Services screen.



- Click **Add** in the Team Members grid. The Staff Search window displays.



Student Screen, Team Tab

- Find and select the staff member.

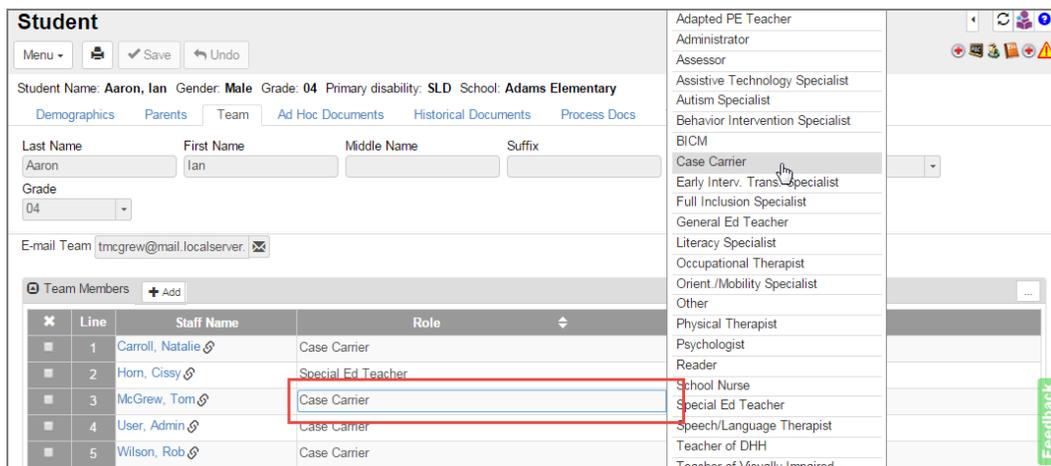
Enter minimal criteria when doing a search. For example, enter the last name and their first name initial.

- Click **Save**.

## Changing the Role of a Team Member

Use these steps to change the role of a team member, including assigning a new Case Manager to a student.

- Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
- (Optional) [Add the new Team member to the Team](#).
- Select the team member's **Role**.



Student Screen, Team Tab

- Click **Save**.

## Deleting a Team Member



If you are the previous Case Manager and you are assigning the new Case Manager, when you delete yourself from the Team, the student record disappears from your Portfolio.

To access the student from the Student View, you must be reassigned to the student's Team.

Use these steps to delete a team member, including a Case Manager.

1. Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
2. Select the **X (Delete)** checkbox in the Team Member's record row in the Team Members group box.

Line	Staff Name	Role	Email
1	Carroll, Natalie	Case Carrier	- synergydemo@mail.localserver.com
<input checked="" type="checkbox"/>	Horn, Cissy	Special-Ed-Teacher	- ehorn@mail.localserver.com
3	McGrew, Tom	Case Carrier	- tmcgrew@mail.localserver.com
4	User, Admin	Case Carrier	-
5	Wilson, Rob	Case Carrier	- rwilson@mail.localserver.com

Student Screen, Team Tab

3. Click **Save**. Synergy removes the staff member from the student's Team and removes the student from that staff's Portfolio.

## Assigning Teams to Students

There are two methods to assign a team to students:

- Using a default team that is setup by the administrator. The default team is assigned to students who are added to Synergy SIS for the first time.



See the *Special Ed School Team* topic in the *Synergy SE Administrator Guide* for more information.

- Using the Manage Student Team screen to:
  - Share students with another special education staff member.
  - Reassign students to another special education staff member.
  - Remove a staff member from all students.



Two roles for each Special Ed staff member is recommended: Case Manager and their normal role such as Special Ed Teacher or Speech Pathologist. See the *Staff Setup* topic in the *Synergy SE Administrator Guide* for more information.

## Managing Student Teams



A Case Manager cannot be deleted from a student's Team List until a new Case Manager is added. Each student must always have an assigned Case Manager.

For each special education team member.

1. Navigate to **Synergy SE > Staff > Manage Student Teams**. The Manage Student Teams screen displays.

The screenshot shows the 'Manage Student Teams' interface. It has two main sections: 'FROM' and 'TO'.  
**FROM Section:**  
 - Staff Role copy/move FROM: Staff Role (dropdown menu, callout 1), Case Manager (dropdown menu, callout 2), Staff Name (text field with search icon, callout 2), Case, Date (text field with search icon, callout 2).  
 - Student List (table with callout 3):  

Line	Add	Student	Grade
1	<input type="checkbox"/>	Adams, Mary	KG
2	<input type="checkbox"/>	Aaron, Sarah	PS
3	<input type="checkbox"/>	Bing, Buddy	KG
4	<input type="checkbox"/>	Charles, Ed	KG
5	<input type="checkbox"/>	Durwood, Joe	01
6	<input type="checkbox"/>	Edward, Cecelia	02

  
**TO Section:**  
 - Staff Role copy/move TO: Staff Role (dropdown menu, callout 4), Staff Name (text field with search icon, callout 5).  
 - Assign Type (radio buttons, callout 6):  
 Assign student to new Staff member, and REMOVE student from existing Staff member.  
 Assign student to new Staff member, but DO NOT remove student from existing Staff member.  
 Remove student from existing Staff member with NO replacement.  
 - Assign Students (button, callout 7).  
 - Current Case Load (text field, value: 39).  
 - Current Students (table):  

Line	Student Name	Grade
1	Aaron, Ian	03
2	Abbott, Billy	01

Manage Student Teams Screen

2. Select the staff and students to **copy/move FROM**:
  - a. Select a **Staff Role**. ①
  - b. Click to select a **Staff Name**. ②
  - c. Select the students from the **Student List** to be moved or click **Select All Students**. ③
3. Select the staff and students to **copy/move TO**:
  - a. Select a **Staff Role**. ④
  - b. Click to select a **Staff Name**. ⑤
  - c. Select the type of transfer: ⑥
    - To reassign the student to a new staff member, select **Assign student to new Staff member, and REMOVE student from existing Staff member**.
    - To share a student with a staff member, select **Assign student to new Staff member, but DO NOT remove student from existing Staff member**.
    - To remove a student because they graduated or to remove all students from a staff member, select **Remove student from existing Staff member with NO replacement**.

- Click **Assign Students**. ⑦ The students move under Current Case Load.

## Special Ed Calendar

The Special Ed Calendar screen displays information from School Calendar and student timeline events.

Some general rules for the calendar:

- If the user is focused to all schools and is exempt from student team, then timelines for all students display in the calendar.
- If the user is focused to a school and belongs to student teams, then only the students belonging to the user's team for that particular focus display in the calendar.
- The screen defaults to the current week.

## Using the Calendar

- Navigate to the **Synergy SE > Student > Special Ed Calendar**. The calendar displays with today's date ① and any scheduled reviews ② highlighted.

Line	Sun	Timeline Due	Mon	Timeline Due	Tue	Timeline Due	Wed	Timeline Due	Thu	Timeline Due	Fri	Timeline Due	Sat	Timeline Due
1	Aug 2015	02	03		04		05		06		07		08	
2		09	10		11		12		13		14		15	
3		16	17		18		19		20		21	Maya, Diane P., IEP Date	22	
4		23	24		25		26		27		28		29	
5		30	31											
6	Sep 2015				01		02		03		04		05	
7		06	07		08		09		10		11		12	
8		13	14		15		16		17		18		19	
9		20	21		22		23		24		25		26	
10		27	28	Aaron, Susan, Triennial Reevaluation	29		30							
11	Oct 2015								01		02		03	

Special Ed Calendar Screen

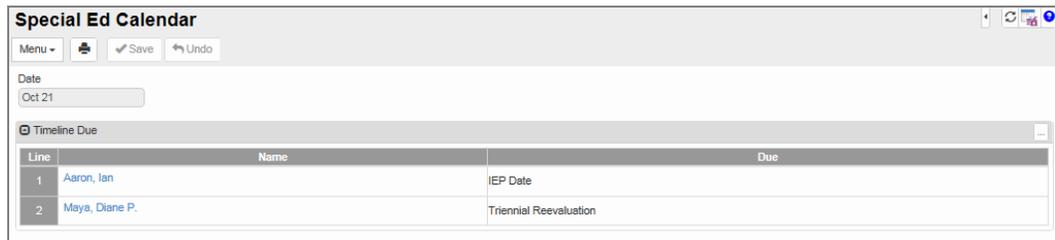
- To display a different date:
  - Select a **Start Date** ③ using the calendar icon to display different dates.
  - Click **Go to Date** ④ to display the selected dates in the calendar.

- To customize the information displayed on the calendar, use the Filter Options. **5**



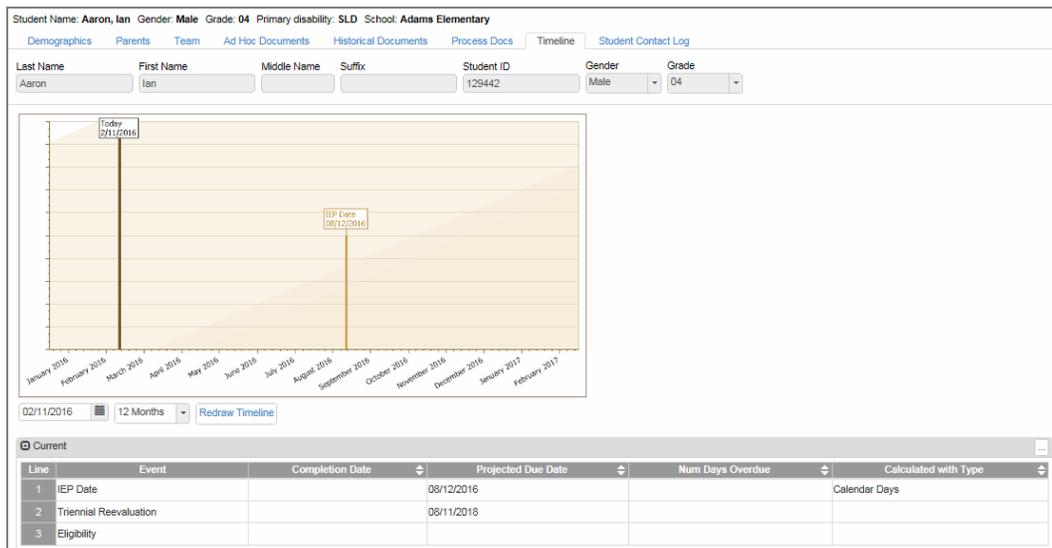
The filters available in the drop-down are based on the calendar dates shown. The filters are additive. Selecting more than one, filters by all the criteria selected.

- Staff** – Select to only display students who have that staff member as part of their team.
  - Roles** – Select to only display students that have a team member with the role.
  - Primary Disability** – Select to only display students that have the selected primary disability.
  - Due Type** – Select to only display students and their events with that due type.
- To view the Timelines Due for a day:
    - Select a day link **21**. The screen displays the Timelines Due on that day.



Special Ed Calendar Screen

- Select student to open the **Timeline** tab of the Student screen.



Student Screen, Timeline Tab

The **Timeline** tab displays progress toward district-established deadlines.

- Green text indicates deadlines met.
- Red text indicates deadlines are overdue.
- Gold text indicates future deadlines.
- A Black line indicates the current date.

The Timeline can be set at 3, 6, 12, or 36 month intervals at user option.

## Assigning Medicaid Services to Students



Not all districts use the Medicaid module.

### Logging Medicaid Services for a Student as a Provider

The Medicaid Provider screen provides the user with a Student List. Access the screen by navigating to **Synergy SE > NTL > Medicaid > Medicaid Provider**.

1. Navigate to **Synergy SE > NTL > Medicaid > Medicaid Provider**.

Line	Student Name	School Name	Student ID	Grade	Start Date	End Date	Detail
1	Abbott, Billy	Adams Elementary School	123456	4	12/25/2016	06/30/2017	
2	Davino, Mary	Hope High School	654987	11	11/13/2016	06/21/2017	

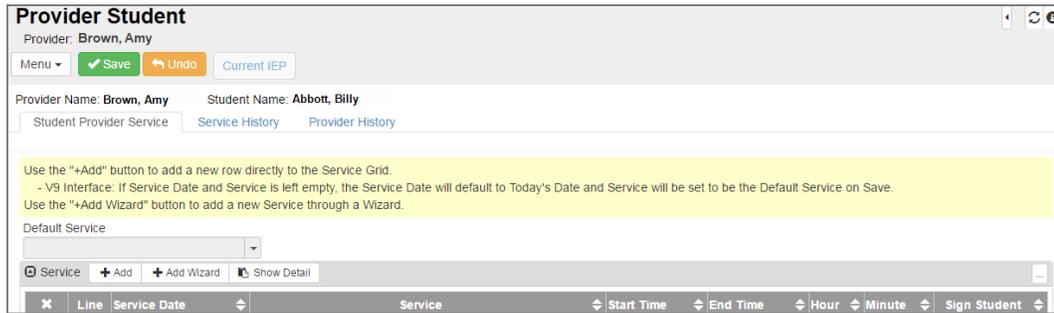
Medicaid Provider Screen

2. Select the **Default Service** to automatically populate all rows with a Service.



- The administrator can select the **Default Service** for you.
- You can change the **Default Service**.
- You can change the Service in the Service grid.

- Click  for the student in the Student Provider Assignment grid. The Provider Student screen displays.



**Provider Student**  
Provider: Brown, Amy  
Menu Save Undo Current IEP

Provider Name: Brown, Amy Student Name: Abbott, Billy  
Student Provider Service Service History Provider History

Use the "+Add" button to add a new row directly to the Service Grid.  
- V9 Interface: If Service Date and Service is left empty, the Service Date will default to Today's Date and Service will be set to be the Default Service on Save.  
Use the "+Add Wizard" button to add a new Service through a Wizard.

Default Service

Service + Add + Add Wizard Show Detail

Line	Service Date	Service	Start Time	End Time	Hour	Minute	Sign Student
------	--------------	---------	------------	----------	------	--------	--------------

Provider Student Screen

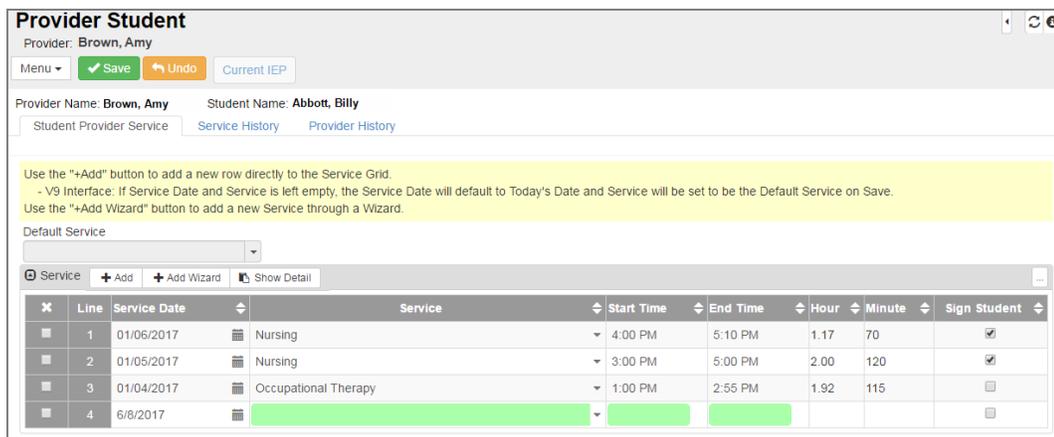
- Add a service.

### Using Add

- Click **Add** in the Service grid. A new row displays in the Service grid.
- Select a **Service**.
  - If you did not select a **Default Service**, select a service directly in the grid.
  - If you selected a **Default Service**, Service populates with the Default Service.

 You can change the service using a drop-down in the grid.

- Enter the **Start Time** and **End Time** or **Hour** and **Minutes** based on your district's setup.
- Select **Sign Student** to sign off on the service.
- Click **Save**.



**Provider Student**  
Provider: Brown, Amy  
Menu Save Undo Current IEP

Provider Name: Brown, Amy Student Name: Abbott, Billy  
Student Provider Service Service History Provider History

Use the "+Add" button to add a new row directly to the Service Grid.  
- V9 Interface: If Service Date and Service is left empty, the Service Date will default to Today's Date and Service will be set to be the Default Service on Save.  
Use the "+Add Wizard" button to add a new Service through a Wizard.

Default Service

Service + Add + Add Wizard Show Detail

Line	Service Date	Service	Start Time	End Time	Hour	Minute	Sign Student
1	01/06/2017	Nursing	4:00 PM	5:10 PM	1.17	70	<input checked="" type="checkbox"/>
2	01/05/2017	Nursing	3:00 PM	5:00 PM	2.00	120	<input checked="" type="checkbox"/>
3	01/04/2017	Occupational Therapy	1:00 PM	2:55 PM	1.92	115	<input type="checkbox"/>
4	6/8/2017						<input type="checkbox"/>

Provider Student Screen



- Click **Current IEP** to view the student's IEP in PDF format.
- Click **Show Detail** to add notes and make edits to the record.

## Using Add Wizard

1. Click **Add Wizard** in the Service grid. The Add Student Service screen displays.

*Add Student Service Screen*

2. Select the **Service**.
3. Select a **Service Date**.
4. Enter a **Start Time** and **End Time**.
5. (Optional) Select a **Service Status**.
6. (Optional) Enter a **Note**.
7. Select the **Sign Student** option when the service is completed and may be billed.
8. Click **Save**. The service displays in the Service or Signed Service grid on the Provider Student screen.

*Provider Student Screen, Student Provider Service Tab*

## Service and Provider History

- The **Service History** tab records all service entries made for the student.

**Provider Student**  
 Provider: User, Admin

Save Undo

Provider Name: User, Admin Student Name: Abbott, Billy

Student Provider Service **Service History** Provider History

Sort

Student Services

Line	SequenceNumber	Service Title	Service Date	Start Time	End Time	Hour	Minute	Provider	Note
1	23074	Speech Therapy Evaluation (Sound Production)	03/08/2016			1.00	60	User, Admin	

Provider Student Screen, Service History Tab

- The **Provider History** tab lists the time periods that the staff member provided service to the student.

**Provider Student**  
 Provider: User, Admin

Save Undo

Provider Name: User, Admin Student Name: Abbott, Billy

Student Provider Service Service History **Provider History**

Student Provider Assignment History

Line	Start Date	End Date
1	03/08/2016	

Provider Student Screen, Provider History Tab

# Chapter 4: Synergy SE Processes

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## Process Overview



Synergy SE is highly customizable and, as a result, the screens that are shown in this document may not appear in your version of Synergy SE. The function of the program is the same.

A student moves from one process to another, as their documents are completed and finalized. All finalized documents are listed in **Historical Documents** tab when the student moves to the next process.

Students can also be [manually moved from one process to another](#) if necessary. All existing documents need to be deleted or finalized prior to manually moving the student.

The following scenarios are available within Synergy SE:

- Initial Process
- Annual Review Process
- Reevaluation Process
- Transfer Process
- Preschool Process
- 504 Process
- Private School Placement (Service Plan)

## Initial Process

Initial Process student documents are created and finalized as the student moves through the Initial Process.

The Individualized Education Program (IEP) is indicated by . It is the trigger document for this process. When it is Validated/Finalized, the student moves to the [Annual Review process](#).

Initial Evaluation						Process Docs									
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	R				E	M				IEP
1	Acosta, Teresa B.	02	Edit	Edit	View										

Portfolio Screen



All documents that were created and finalized in the initial process are listed in **Historical Documents** tab. See the [Synergy SE – Documents Guide](#) for your state for more information on historical documents.

## Annual Review Process

Annual Review students remain in the Annual Review process until the time specified by the district. For example, six months prior to their reevaluation date.

When the time interval is reached, they automatically move to the Reevaluation process to prepare for their triennial evaluation.



Students may also be [moved manually to another process](#).

## Reevaluation Process

The Reevaluation Process student documents are created and finalized as the student moves through the Reevaluation Process.

- Access the current Individualized Education Program (IEP) by clicking . The date in the current IEP is the trigger document for this process. When it is Validated/Finalized, the student moves to the [Annual Review process](#).
- The quarterly Progress Reports are available by clicking  and includes the goals that were added to the initial IEP.
- The working copy of the IEP for next evaluation is indicated by  and is edited in the student's upcoming Annual Review IEP.
- The Annual Review Date is indicated by .
- The Reevaluation Date is indicated by .

Reevaluation															
Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	IEP	Prg	R	W	Process Docs				A-R Date	R-E Date
										E	M				
1	Aaron Jan	04	Edit	Edit	View									11/05/2014	09/11/2017

Portfolio Screen



All documents that were created and finalized in the reevaluation process are listed in **Historical Documents** tab. See the [Synergy SE – Documents Guide](#) for your state for more information on historical documents.

## Transfer Process

Transfer students are special education students who have transferred into the district. They can be moved to any process based on the team's decision.

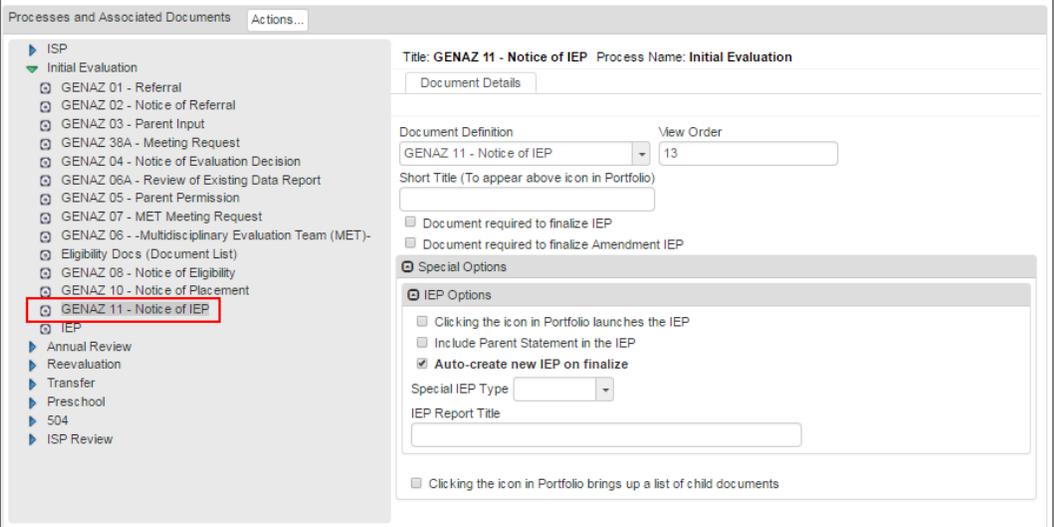
- Finalize the Transfer Meeting Request and Notice of Transfer documents.
- The Transfer IEP is the trigger that moves the student to the appropriate process.



All documents that were created and finalized in the transfer process are listed in **Historical Documents** tab. See the [Synergy SE – Documents Guide](#) for your state for more information on historical documents.



- To edit a document:
  - a. Use  to locate an existing document in the process.
  - b. Select the document. It displays on the right side of the screen.



Processes and Associated Documents    Actions...

ISP

- Initial Evaluation
  - GENAZ 01 - Referral
  - GENAZ 02 - Notice of Referral
  - GENAZ 03 - Parent Input
  - GENAZ 38A - Meeting Request
  - GENAZ 04 - Notice of Evaluation Decision
  - GENAZ 06A - Review of Existing Data Report
  - GENAZ 05 - Parent Permission
  - GENAZ 07 - MET Meeting Request
  - GENAZ 06 - Multidisciplinary Evaluation Team (MET)-
  - Eligibility Docs (Document List)
  - GENAZ 08 - Notice of Eligibility
  - GENAZ 10 - Notice of Placement
  - GENAZ 11 - Notice of IEP**
  - IEP
- Annual Review
- Reevaluation
- Transfer
- Preschool
- 504
- ISP Review

Title: GENAZ 11 - Notice of IEP    Process Name: Initial Evaluation

Document Details

Document Definition    View Order

GENAZ 11 - Notice of IEP    13

Short Title (To appear above icon in Portfolio)

Document required to finalize IEP

Document required to finalize Amendment IEP

Special Options

IEP Options

Clicking the icon in Portfolio launches the IEP

Include Parent Statement in the IEP

Auto-create new IEP on finalize

Special IEP Type

IEP Report Title

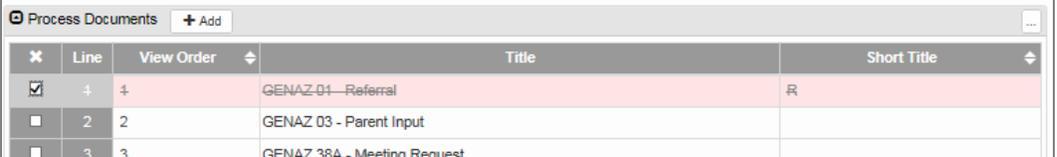
Clicking the icon in Portfolio brings up a list of child documents

Process Setup Screen, IEP Processes Tab



The **View Order** and **Short Title** may be edited in the Process Documents section of the Process.

- To delete a document:
  - a. Click the box in the **X** column.
  - b. Click **Save**.



X	Line	View Order	Title	Short Title
<input checked="" type="checkbox"/>	4	4	GENAZ 01 - Referral	R
<input type="checkbox"/>	2	2	GENAZ 03 - Parent Input	
<input type="checkbox"/>	3	3	GENAZ 38A - Meeting Request	

Process Setup Screen, IEP Processes Tab

2. Enter or modify the document details.

 When creating an IEP document, only the **View Order** and **IEP Options** must be completed.

Process Document Screen

- **Document Definition** – Select a document. Only documents that are not identified as a Ad Hoc Document display in the drop-down. If the document is an IEP, see [Special IEP Type](#).
- **View Order** – Enter the number to have the document display in a specific order.
- **Short Title** – Enter to display a short title over the Process Docs column.

Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	Transportation	Process Docs
1	Abbott, Billy	01	Edit	Edit	View	View	R E M IEP
2	Baker, Cary	09	Edit	Edit	View	View	R E M IEP

Portfolio Screen

- **Document required to finalize IEP** – Select to require that this document be finalized before finalizing the IEP.
  - **Document required to finalize Amendment IEP** – Select to require that this document be finalized before finalizing an amended IEP.
3. (For IEP documents only) Complete the IEP Options and Process Movement sections.
- IEP Options:
    - **Clicking the icon in Portfolio launches the IEP** – Select to allow the IEP be opened from the Portfolio screen.
    - **Include Parent Statement in the IEP** – Select to include the **Parent Statement** tab in the IEP.

- **Auto-create new IEP on finalize**
  - Do not select to have  display for a draft IEP after the IEP is finalized.
  - Select to have  display after the IEP is finalized. No draft IEP is created.
- **Special IEP Type** – Select the type of IEP.
- **IEP Report Title** – Enter the name of the IEP that displays on the IEP screen and printed IEP.
- **Clicking the icon in the Portfolio brings up a list of child documents** – Select to have the Document List screen display for eligibility documents.

**Document List**

Student Name: **Abbott, Billy**

Menu ▾  Save Undo

Student Name: **Abbott, Billy** Gender: **Male** Grade: **02** Primary Disability: School: **Desert Vista Elementary**

Documents

Existing Documents

* Line	Document Date	Document ID	Document Name	Action
1	04/30/2015	GENAZ 66	Eligibility Determination - Speech/Language Impairment	Edit

Document Creation

Line	Document ID	Document Name	Action
1	GENAZ 56	Eligibility Determination - Autism	Create
2	GENAZ 57	Eligibility Determination - Emotional Disability	Create
3	GENAZ 58	Eligibility Determination - Hearing Impairment	Create
4	GENAZ 59	Eligibility Determination - Intellectual Disability	Create
5	GENAZ 60	Eligibility Determination - Multiple Disabilities / SSI	Create

Document List Screen

- **Process Movement: Annual Process**
  - **Annual Process** – Select from the drop-down.
  - **Reeval Process** – Select from the drop-down.
  - **Reeval Look Ahead Months** – Enter the number of months that if the Annual Review and Reevaluation are due within that amount of time, the student is moved to Reeval Process and not the Annual Process.

Process Movement

Annual Process: Annual Review ▾ Reeval Process: Reevaluation ▾ Reeval Look Ahead Months: 6

Process Document Screen

4. Click **Save**.

# Chapter 5: Synergy SE Reports

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## Admin Progress Report

Use to batch print progress reports.

1. Set focus to a school.
2. Navigate to **Synergy SE > NTL > Admin Progress Report**.

Line	Print	Student Name	SIS Number	Grade	Disability	Current IEP Date	Progress Report		ESY Progress Report			
							Date	Complete	Date	Complete		
1	<input type="checkbox"/>	Labianca, Douglas S.	888763	11		02/20/2017	<a href="#">Progress Report</a>	08/02/2017	No	<a href="#">ESY Progress Report</a>		
2	<input type="checkbox"/>	Nansel, Craig B.	903013	10		07/26/2017	<a href="#">Progress Report</a>			<a href="#">ESY Progress Report</a>		
3	<input type="checkbox"/>	Pace, Terry F.	903453	10		07/26/2017	<a href="#">Progress Report</a>			<a href="#">ESY Progress Report</a>		
4	<input type="checkbox"/>	Valasco, Randy M.	909354	11		07/26/2017	<a href="#">Progress Report</a>			<a href="#">ESY Progress Report</a>		

Admin Progress Report Screen

3. (Optional) **Sort** the data by selecting *Name*, *Grade: Ascending*, or *Grade: Descending*.
4. Click **Refresh Data** to update the Students grid. **Data last refreshed on** displays the date and time the last time the data was read.



If progress periods were added to a student's Progress Report, click **Refresh Data** for the latest progress period to appear in the grid.

5. Set the Filter Options.
  - **Staff** – Select to show results based on a specific staff member
  - **Role** – Select to show results based on a specific staff role
  - **Primary Disability** – Select to show results based on a specific disability
  - **Exited** – Select whether to show exited students.
  - **Completed** – Select to show results based on a status



When you select **No**, only the blank items or those that display **No** for the regular and ESY progress report display.  
When you select **Yes**, the items with **Yes** in either column display.

- **Filter by Date** – Enter a date and click **Filter** to show the progress period for the specified date and the **Completed** status of that period. If the student does not have a progress period for the specified date, the date and Complete columns are blank.



When **Filter by Date** is blank, the Students grid displays the latest date of the progress period and the Completed status of that period.

Once you make a selection in any of the fields, the grid displays the filtered data.



Click **Clear Filters** to remove all filters and the clear the **Sort** option.

6. (Optional) Select the **Enable Double Sided Printed** checkbox to print an extra page at the end of odd numbered progress reports so the last page from one student does not print on the same sheet of paper as the next student.
7. Select the which students that you want to print a progress report.
  - **Print** checkbox to select individual students
  - Click **Select All** to print all of the reports
  - Click **Deselect All** to clear the options.
8. Print the reports
  - Click **Print** to print all progress reports for students with **Print** selected
  - Click **Print ESY** to print all ESY progress reports for students with **Print** selected

The job queue prints the progress reports or ESY progress reports and also creates a log with one line for each student selected. The log indicates if the progress report or ESY progress report printed for a student or not.

## Student Area

---

- **Student Name** – Click the student link to open the SE Student screen.
- **Progress Report** – Click the link to display the student's progress report.
- **ESY Progress Report** – Click the link to display the student's ESY progress report if used by the district.
- **Date** – Displays the latest progress period or ESY progress period date.



This field shows the **Filter by Date** if entered and the student has a progress period with that date. Otherwise, it appears blank.

- **Complete** – Shows **Yes** if the goals for the progress period were completed.

## Synergy SE Reports

Synergy SIS provides the following reports for special education. There are reports that apply to Staff and Students. The Reports screens have the following tabs:

- **Options** – Identifies criteria specific to the report, including dates, codes, and descriptions, which the user may select to filter the results of the desired report.
- **Sort/Output** – Allows for sorting the report results and providing options for the file output type.
  - **Prompt for download** – Prevents the report results from loading in a browser window and instead prompts to download the results directly to a directory.
  - **Show Active/Inactive** – Allows the user to define the students to include in the report without changing the focus.



In most cases, the option to **Display "Confidential"** on the report is available. Mail Merge options and the printing of additional related reports are available for selected reports.

Report **ELI01: Eligibility List**

Print Save Default Reset Saved Default Email Me

Name: Eligibility List Number: ELI01 Page Orientation: Portrait

Filters **Sort / Output** Conditions Selection Advanced

**Output**

File Type: PDF Prompt for download:  Show Active/Inactive: Active And Inactive

**Label Options**

Display "Confidential" Display "Printed by" User ID Show "Printed by" User ID

**Phone Number Options**

Mask Phone Numbers: Mask unlisted phone numbers

Student Mandatory Sort Properties: None

**Student**

Line	Sort By	Sort Order
1	Student Name (Student.FormattedName)	Ascending

**Mail Merge Options**

Merge Document Merge Output Type Merge Language Property

The Merge Language Property is used to determine which version of the document (defined in Mail Merge setup) will be created. If there is no corresponding document for the given language (or this field is left blank) the default letter is used.

Reports Screen, Sort/Output Tab

- **Conditions** – Allows specific data and value ranges.

The screenshot shows the 'Conditions' tab of the 'Report ELI01: Eligibility List' interface. At the top, there are buttons for 'Print', 'Save Default', 'Reset Saved Default', and 'Email Me'. Below these, the report details are displayed: 'Name: Eligibility List', 'Number: ELI01', and 'Page Orientation: Portrait'. A navigation bar includes 'Filters', 'Sort / Output', 'Conditions' (highlighted with a red box), 'Selection', and 'Advanced'. The main area is titled 'Student' and contains a table with the following structure:

Line	Condition	Not	Operator	Value
1	Grade (Student.Grade)		Equal To	9

Reports Screen, Conditions Tab

- **Selection** – Provides the user the ability to filter the report to include a given ad-hoc set of students, courses, sections, staff, and to be filtered by student group.

The screenshot shows the 'Selection' tab of the 'Report ELI01: Eligibility List' interface. It features the same top navigation and report details as the previous screenshot. The 'Selection' tab is highlighted with a red box. Below the navigation bar, there is an 'Object Type' dropdown menu with a 'Select' button and a 'Clear' button. The main area contains a table with the following structure:

Line	Condition
------	-----------

Reports Screen, Selection Tab

- **Advanced** – Provides options to schedule the report to be processed at intervals and to notify and send the report to designated users within the school district network.

 Completed reports may also be saved and placed in designated server folders if desired.

Report **ELI01: Eligibility List**







 Print
Save Default
Reset Saved Default
Email Me

Name: **Eligibility List** Number: **ELI01** Page Orientation: **Portrait**

Filters   Sort / Output   Conditions   Selection   Advanced

**Schedule Job**

Schedule Task

Once

**Notification**

Email the following address(es) upon completion  
 e.g. user@server.net, user2@server2.com

Include the result report as an attachment

**External Interface**

Fully qualified UNC destination output path for the report results. The output file name (if specified) can be static or include {Date}, {Time} or {DateTime} to create a unique output file name.  
 e.g. \\SERVER\FOLDER\FILE{DateTime}.txt

Fully qualified UNC path to the external application to be launched upon successful completion. Use {File}, {Path}, and {PathFile} tags to optionally pass information about the output file to the application.  
 e.g. \\Server\Folder\AppToExecute.exe {File}

*Reports Screen, Advanced Tab*

## Available Reports

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The available Staff reports are:

- [CAS01: Case Load](#)
- [CLS-LST-01: Class List](#)
- [TCH401: Staff Directory](#)

The available Student reports are:

- [EL101: Eligibility List](#)
- [EMAIL-EVAL: Evaluation Due Date Report](#)
- [EMAIL-EVENT: Timeline Event Due Date Report](#)
- [EMAIL-IEP: IEP Due Date Report](#)
- [EMAIL-OVER: Timeline Overdue Report](#)
- [EVA01: Evaluation List](#)
- [IEP-DIS-00: IEP Disability Report](#)
- [IEP-DIS-01: IEP Disability Report by Case Manager and School](#)
- [RSK01: Risk Report](#)
- [RSK02: Risk Report](#)
- [RSK03: Risk Report](#)
- [RSK04: Risk Report](#)
- [SIS401: SIS Discrepancy Report](#)
- [SIS402: SIS Synchronization Log](#)
- [STU001: Student Listing](#)

## Running Reports

---

1. Navigate to **Synergy SE > Staff > Reports**.
2. Select the report.
3. Select the **Options**, **Sort/Output**, **Conditions**, **Selection**, and **Advanced** options for the report.
4. Click **Print**.

## Staff Reports

### CAS01: Case Load

#### Synergy SE > Staff > Reports

The Case Load report prints the case load for each case manager at the selected school. The report includes the list of students for whom the user is listed as case manager or case carrier on the student's team list.

CAS01: Case Load Report Interface Screen

#### Report Options:

- **Selected School Name** – Select a school name from the drop-down.
- (Optional) **Case Carrier** – Select the **Last Name** and **First Name** of the case manager.

Case Carrier	User, Admin
Aaron, Ian	
Aaron, Theresa	
Abdulbari, Kathy A.	
Alejandrez, Willie JR	
Armenta, Sandra	
Covington, Louis L.	
Jack, Chris E.	
Martinez, Henry E.	
Maya, Diane P.	
Pablo, Roy J.	
Rabinowitz, Rose A.	
(Student, Elementary D.)	
Zelda, Manny	
<b>Total:</b>	<b>13</b>

CAS01: Case Load Output

## CLS-LST-01: Portfolio List

### Synergy SE > Staff > Reports

The Portfolio List report prints the class list for the selected staff member. The report includes the list of students for whom the user is listed as a team member. The grade, gender, school, next IEP date, and next evaluation day is included in the report.

CLS-LST-01: Portfolio List Report Interface Screen

### Report Options:

- Staff Last Name
- Staff First Name

Staff Name: User, Admin		Adams Elementary Portfolio List			Year: 2015-2016 Report: CLS-LST-01	
Student Name	Grade	Gender	School	Next IEP Date	Next Eval Date	
Aaron, Ian	04	Male	Adams Elementary	10/21/2015	08/27/2018	
Armenta, Sandra	PS	Female	Adams Elementary			
Maya, Diane P.	PS	Female	Adams Elementary			
Total: 3		Students				

CLS-LST-01: Portfolio List Output

## TCH401: Staff Directory

### Synergy SE > Staff > Reports

The Staff Directory report lists all staff including their email, primary phone number, and address. The list is sorted by staff type.

TCH401: Staff Directory Report Interface Screen

### Report Options:

- **Type** – Select from the drop-down to filter by staff type
- **Address Type** – Select from the drop-down to sort by home or mailing address.

Adams Elementary									2009-2010
Staff Name	Gen	E-Mail	Type	Phone Number	Extn	Home Address	City	St	Zipcode
<b>Maintenance</b>									
McGrew, Tom	M	tmcgrew@edupoint.com	Work	480-458-0900	222	1550 E McKellips	Phoenix	AZ	85694
Weathers, Julia	F	Julia.Weathers@edupoint.com	Work	480-833-2900	507	1550 E McKellips Rd	Phoenix	AZ	85694
<b>Teacher</b>									
Andrews, Mark	M	MAndrews@ees.k12.org	Home	480-964-7800		1955 S Val Vista Dr	Mesa	AZ	85204
Berriz, Carol	F	CCBerriz@ees.k12.org							

TCH401: Staff Directory Output

## Student Reports

### APM01: Automatic Process Movement

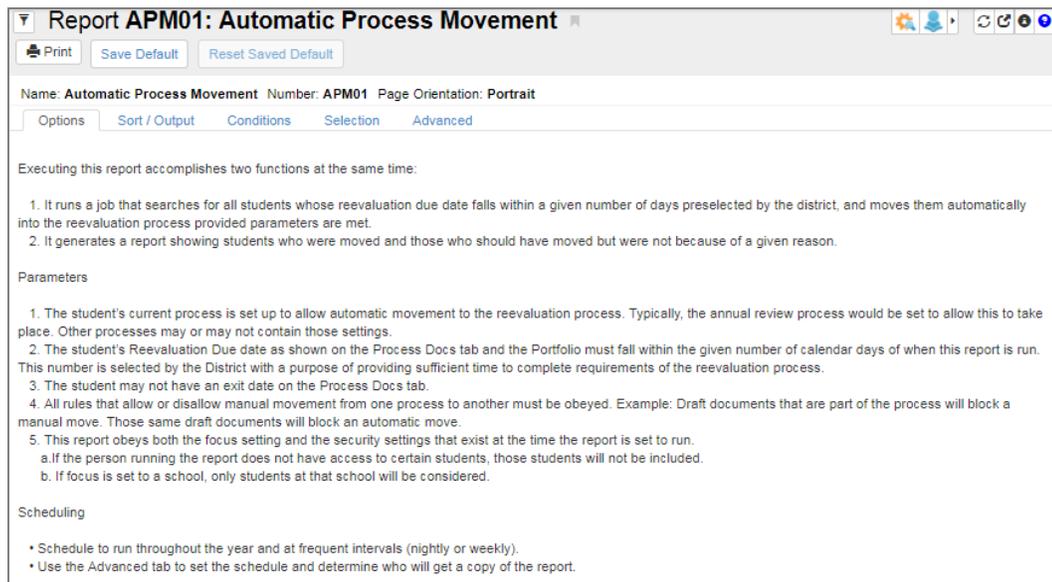
#### Synergy SE > Student > Reports

The Automatic Process Movement report:

- Runs a job that searches for all students whose **Reevaluation Due Date** falls within the number of days selected by the district and moves them automatically into the Reevaluation Process provided parameters are met.
- Generates a report showing students who were moved with a blank Message and those who were not moved and the reason in the Message column.

Example messages for student's who did not move:

- Student Reevaluation date is less than today's date.
- Cannot move document(s): GENAZ 1000B.



APM01: Automatic Process Movement Report Interface Screen

#### Parameters:

There are no options to set for this report, however the following parameters apply.

- The student's current process is set up to allow automatic movement to the Reevaluation Process.



Typically, use the Annual Review process to automatically move students. Other processes may or may not contain automate movement settings.

- The student’s **Reevaluation Due Date** as shown on the **Process Docs** tab and the Portfolio must fall within the given number of calendar days of when this report is run.

 This number is selected by the District with a purpose of providing sufficient time to complete requirements of the reevaluation process.

- The student does not have an **Exit Date** on the **Process Docs** tab.

**Rules:**

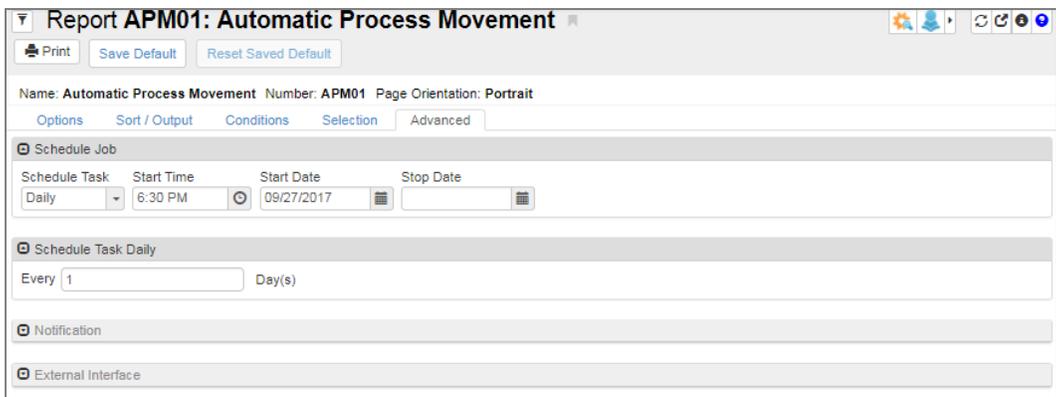
The report follows the following rules:

- All rules that allow or disallow manual movement from one process to another are obeyed. For example, draft documents that are part of the process that block a manual move also block an automatic move.
- This report obeys both the focus setting and the security settings that exist at the time the report runs. For example:
  - If the person running the report does not have access to certain students, those students are not included.
  - If focus is set to a school, only students at that school are considered.

**Scheduling:**

Use the **Advanced** tab to set the schedule and determine who receives copy of the report.

 Schedule to run throughout the year and at frequent intervals (nightly or weekly).



*APM01: Automatic Process Movement Report Interface Screen, Advanced Tab*

<b>Edupoint School District</b>				
<b>Automatic Process Moves</b>				
				Year: 2016-2017 Report: APM01
<b>School: Hope High School</b>				
Student Name	SIS Number	Grade	Student Moved	Message
Abbott, Billy A	903456	10	No	Student Reevaluation date is less than today's date.
<b>School: Jefferson Elementary</b>				
Student Name	SIS Number	Grade	Student Moved	Message
James, Mary R	978978	5	No	Student Reevaluation date is less than today's date.
<b>School: King High School</b>				
Student Name	SIS Number	Grade	Student Moved	Message
Acosta, Joseph G	172306	11	No	Student Reevaluation date is less than today's date.
<b>School: Lincoln Elementary</b>				
Student Name	SIS Number	Grade	Student Moved	Message
Ackerman, Brian	120952	3	No	Student Reevaluation date is less than today's date.
<b>School: Adams Elementary</b>				
Student Name	SIS Number	Grade	Student Moved	Message
Aaron, Ian	132123	1	Yes	

*APM01: Automatic Process Movement Output*

## ELI01: Eligibility List

### Synergy SE > Student > Reports

The Eligibility List report provides a list of students based on primary disability options selected. The report includes student name, ID and address, parent information, primary language, and disability.

ELI01: Eligibility List Report Interface Screen

### Report Options:

- **Disability** – Select the **Disability Codes**. Select no options to have all disabilities print.

Edupoint School District Eligibility List								Year: 2009-2010 Report: ELI01
Student Number	Student Name	Birth Date	Next IEP Date	Placement	ELL Fluency Level	Primary Language	Primary Disability	
41	Aaron, Susan	05/06/2004	04/05/2012				SPECIFIC LEARNING DISABILITY	
	Father Phillip Aaron			480-555-6767				
	1953 S Val Vista Dr, Mesa, AZ 85234							
	Mother Kathleen Aaron			480-555-1214				
	1953 S Val Vista Dr, Mesa, AZ 85234							
120952	Ackerman, Brian M.	10/04/1995	12/01/2010					
	Mother Diana Ackerman			480-555-0832				
	2010 N Lindsay Rd, Tempe, AZ 85662							
	Father Eugene Ackerman			480-555-2593				
	2010 N Lindsay Rd, Tempe, AZ 85662							
962860	Akins, Shawn E.	02/17/1998	02/01/2010				MILD MENTAL RETARDATION	
	Mother Barbara Akins			602-555-4438	204			
	1522 N Gentry Ct, Tempe, AZ 85662							
	Father Adam Akins			480-555-5495				
	1522 N Gentry Ct, Tempe, AZ 85662							
157131	Babb, Mark M.	10/16/1996	05/12/2010				SEVERE MENTAL RETARDATION	
	Father Walter Babb			480-555-9967				
	1533 W Garden St, Mesa, AZ 85612							
	Mother Sarah Babb			480-555-2968				
	1533 W Garden St, Mesa, AZ 85612							
978780	Facio, Wayne E.	12/15/1999	02/16/2011				OTHER HEALTH IMPAIRED	
	Father Alan Facio			480-555-4629				
	137 N Miller St, Mesa, AZ 85620							
	Mother Diana Magana			480-555-4629				
	137 N Miller St, Mesa, AZ 85620							
936165	Galarza, Jerry M.	07/09/1997	12/02/2010				SPECIFIC LEARNING DISABILITY	
	Father Aaron Galarza							
	No Address Given, Phoenix, AZ 85604							
	Mother Cheryl Delanie			480-555-6510				
	835 S 35th Pl, Mesa, AZ 85604							

ELI01: Eligibility List Output

## EMAIL- EVENT: Timeline Event Due Date Report

### Synergy SE > Student > Reports

The Timeline Event Due Date Report lists all case managers with a student that has a timeline event for the period selected. It can create a report and/or send emails to the individual case managers.

Report **EMAIL- EVENT: Timeline Event Due Date Report**

Print Save Default Reset Saved Default Email Me

Name: Timeline Event Due Date Report Number: EMAIL-EVENT Page Orientation: Portrait

Options Sort / Output Conditions Selection Advanced

Email Content:

Days to Look Ahead: Type:

Events to Include

- Initial Evaluation - Respond to Parent
- Initial Evaluation - MET
- Initial Evaluation - Eligibility
- Initial Evaluation - IEP
- Initial Evaluation - Triennial Reevaluation
- Annual Review - Eligibility
- Annual Review - IEP
- Annual Review - Triennial Reevaluation
- Reevaluation - MET
- Reevaluation - Eligibility
- Reevaluation - IEP
- Reevaluation - Triennial Reevaluation
- Transfer - Eligibility
- Transfer - IEP
- Transfer - Triennial Reevaluation
- Preschool - Eligibility
- Preschool - IEP
- Preschool - Triennial Reevaluation
- 504 Process - Eligibility
- 504 Process - IEP
- 504 Process - Triennial Reevaluation
- ISP Initial - Eligibility
- ISP Initial - IEP
- ISP Initial - Triennial Reevaluation

Send Email

Use 'Default Email'

Comment:

EMAIL- EVENT: Timeline Event Due Date Report Interface Screen

### Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having student's with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – (Optional) Enter a comment to be printed at the top of the report and in the body of the email.
- **Events to Include** – Select a least one event from the options.

Edupoint		Hope High School				Year: 2011-2012
School District		Timeline Event Due Date Report				Report: EMAIL-EVENT
Type: Business Calendar Days		Send Email <input type="checkbox"/>				
Comment:						
<b>Case Manager: Admin User</b>		<b>Email Address: @edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
888763	Labianca, Douglas S.	11	IEP	04/16/2012	-78	Hope High School
888763	Labianca, Douglas S.	11	Triennial Reevaluation	09/10/2012	27	Hope High School
888349	Pace, Michelle L.	11	Triennial Reevaluation	09/19/2012	34	Hope High School
101789	Smith, Harry J.	12	Triennial Reevaluation	10/10/2012	49	Hope High School
<b>Case Manager: Mark Andrews</b>		<b>Email Address: email@edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
101789	Smith, Harry J.	12	Triennial Reevaluation	10/10/2012	49	Hope High School
<b>Case Manager: Rob Wilson</b>		<b>Email Address: email@edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	Triennial Reevaluation	10/09/2012	48	Hope High School
905483	Abbott, Billy C.	12	IEP	11/28/2012	84	Hope High School

EMAIL-EVENT: Timeline Event Due Date Report Output

## EMAIL-EVAL: Evaluation Due Date Report

### Synergy SE > Student > Reports

The Evaluation Due Date Report lists all case managers with a student that has an evaluation due for the period selected. It can create a report and/or send emails to the individual case managers.

The screenshot shows a web application window titled "Report EMAIL-EVAL: Evaluation Due Date Report". At the top, there are buttons for "Print", "Save Default", "Reset Saved Default", and "Email Me". Below these, the report details are displayed: "Name: Evaluation Due Date Report", "Number: EMAIL-EVAL", and "Page Orientation: Portrait". A tabbed interface is visible with "Options" selected, and other tabs include "Sort / Output", "Conditions", "Selection", and "Advanced". The "Options" section contains the following fields:

- Email Content:** A dropdown menu.
- Days to Look Ahead:** A text input field with the value "1".
- Type:** A dropdown menu.
- Send Email
- Use 'Default Email'
- Comment:** A large text area.

EMAIL-EVAL: Evaluation Due Date Report Interface Screen

### Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having student's with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – (Optional) Enter a comment to be printed at the top of the report and in the body of the email.

Edupoint		Hope High School Evaluation Due Date Report				Year: 2011-2012 Report: EMAIL-EVAL
Days to Look Ahead: 180		Type: Business Calendar Days				
From Email Address:		Send Email <input type="checkbox"/>				
Comment:						
<b>Case Manager: Admin User</b>		<b>Email Address: @edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Due Date	Days Until Due	School	
888763	Labianca, Douglas S.	11	09/10/2012	27	Hope High School	
888349	Pace, Michelle L.	11	09/19/2012	34	Hope High School	
101769	Smith, Harry J.	12	10/10/2012	49	Hope High School	
<b>Case Manager: Mark Andrews</b>		<b>Email Address: email@edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Due Date	Days Until Due	School	
101769	Smith, Harry J.	12	10/10/2012	49	Hope High School	
<b>Case Manager: Rob Wilson</b>		<b>Email Address: email@edupoint.com</b>		<b>Email Status: Not Sent</b>		
Student Id	Student Name	Grade	Due Date	Days Until Due	School	
905493	Abbott, Billy C.	12	10/09/2012	48	Hope High School	

EMAIL-EVAL: Evaluation Due Date Report Output

## EMAIL-IEP: IEP Due Date Report

### Synergy SE > Student > Reports

The IEP Due Date Report lists all case managers with a student that has an IEP due for the period selected. It can create a report and/or send emails to the individual case managers.

EMAIL-IEP: IEP Due Date Report Interface Screen

### Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having student's with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – (Optional) Enter a comment to be printed at the top of the report and in the body of the email.

Case Manager: Admin User		Email Address: @edupoint.com		Email Status: Not Sent	
Student Id	Student Name	Grade	Due Date	Days Until Due	School
888763	Labianca, Douglas S.	11	04/16/2012	-78	Hope High School

Case Manager: Rob Wilson		Email Address: email@edupoint.com		Email Status: Not Sent	
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	11/28/2012	84	Hope High School

EMAIL-IEP: IEP Due Date Report Output

## EMAIL-OVER: Timeline Overdue Report

### Synergy SE > Student > Reports

The Timeline Overdue Report lists all case managers with a student that has an overdue timeline event, including eligibility, IEP, or triennial reevaluation, for the period selected. It can create a report and/or send emails to the individual case managers.

EMAIL-OVER: Timeline Overdue Report Interface Screen

### Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having student's with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – (Optional) Enter a comment to be printed at the top of the report and in the body of the email.

Case Manager: Admin User							Email Address: @edupoint.com	Email Status: Not Sent
Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School		
888763	Labianca, Douglas S.	11	IEP	04/16/2012	101	Hope High School		

Case Manager: Rob Wilson							Email Address: email@edupoint.com	Email Status: Not Sent
Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School		
902870	(Abernethy, Anne E.)	10	MET	11/07/1999	4845	Hope High School		
902870	(Abernethy, Anne E.)	10	IEP	11/17/1999	4835	Hope High School		

EMAIL-OVER: Timeline Overdue Report Output

## EVA01: Evaluation List

### Synergy SE > Student > Reports

The Evaluation List displays students due for the specified review type within a specified date range.

*EVA01: Evaluation List Report Interface Screen*

### Report Options:

- **Start Date** – Select the start date.
- **End Date** – Select the end date.
- **Review Type** – Select the review type from the drop-down.

Edupoint		Edupoint School District Evaluation List			Year: 2009-2010 Report: EVA01	
ID	Student Name	Date Finished	Date Due	Review Type	DIS Services	Mental Health:
157131	Babb, Mark M.		11/17/2011	Triennial	No	No
978780	Facio, Wayne E.		04/13/2011	Triennial	No	No
107725	Laffoon, Craig E.		12/05/2011	Triennial	No	No
148655	Martinez, Henry E.		03/01/2011	Triennial	No	No

*EVA01: Evaluation List Output*

## IEP-DIS-00: IEP Disability Report

### Synergy SE > Student > Reports

The IEP Disability report prints a list of all students that include selected details of their current, previous, and draft IEPs. The list is sorted by case manager. The report includes student name, student ID, grade, IEP and triennial dates, school, and disability and services provided.

Report **IEP-DIS-00: IEP Disability**

Print
 Save Default
 Reset Saved Default
 Email Me

Name: **IEP Disability** Number: **IEP-DIS-00** Page Orientation: **Landscape**

Filters  
  School Filter  
  Sort / Output  
  Conditions  
  Selection  
  Advanced

Staff Last Name

Staff First Name

Role

<input type="checkbox"/> Teacher of DHH	<input type="checkbox"/> Case Carrier	<input type="checkbox"/> Psychologist	<input type="checkbox"/> Teacher Specialist
<input type="checkbox"/> Speech/Language Therapist	<input type="checkbox"/> Literacy Specialist	<input type="checkbox"/> Early Interv. Trans. Specialist	<input type="checkbox"/> Autism Specialist
<input type="checkbox"/> Assistive Technology Specialist	<input type="checkbox"/> Occupational Therapist	<input type="checkbox"/> Physical Therapist	<input type="checkbox"/> Behavior Intervention Specialist
<input type="checkbox"/> Full Inclusion Specialist	<input type="checkbox"/> School Nurse	<input type="checkbox"/> Adapted PE Teacher	<input type="checkbox"/> Other
<input type="checkbox"/> Orient./Mobility Specialist	<input type="checkbox"/> General Ed Teacher	<input type="checkbox"/> Special Ed Teacher	<input type="checkbox"/> Administrator
<input type="checkbox"/> Assessor	<input type="checkbox"/> Teacher of Visually Impaired	<input type="checkbox"/> Reader	<input type="checkbox"/> BICM

Primary Ethnic Code

American Indian or Alaska Native  
  Asian  
  Black or African American  
  Native Hawaiian or Other Pacific Islander  
  White

Participation

**Miscellaneous**

ESY  
  ELL  
  ITP

IEP Status

Current  
  Draft  
  Previous

Disagree  
  Proposal  
  FAPE Offer

Did Not Sign  
  Temporary  
  On Hold

Translation  
  Stopped

Grade Level

09  
  10  
  11  
  12

Service <input type="checkbox"/> ↔ <input type="checkbox"/>		
<input type="checkbox"/> Adapted Physical Education	<input type="checkbox"/> Adaptive Skills	<input type="checkbox"/> Adult Living Preparation
<input type="checkbox"/> Advocacy Skills	<input type="checkbox"/> Aide Svcs - Personal Care/ADL	<input type="checkbox"/> Aide Svcs - Reinforcement of Behav/Psych-Soc Goals
<input type="checkbox"/> Aide Svcs - Reinforcement of O/T Goals	<input type="checkbox"/> Aide Svcs - Reinforcement of P/T Goals	<input type="checkbox"/> Aide Svcs - Reinforcement of Speech/Language Goals
<input type="checkbox"/> Anger Management	<input type="checkbox"/> Artic/Language (SLI)	<input type="checkbox"/> Articulation of Speech Sounds (SLI)
<input type="checkbox"/> Audiological Evaluation	<input type="checkbox"/> Basic Reading Skills	<input type="checkbox"/> Behavior Management
<input type="checkbox"/> Behavioral Health	<input type="checkbox"/> Braille Reading	<input type="checkbox"/> Braille Writing
<input type="checkbox"/> Career Development Skills	<input type="checkbox"/> Cognitive Skills	<input type="checkbox"/> Communication Skills
<input type="checkbox"/> Community Skills	<input type="checkbox"/> Compensatory Skills	<input type="checkbox"/> Conflict Resolution Strategies
<input type="checkbox"/> Consultative Services	<input type="checkbox"/> Coping Strategies	<input type="checkbox"/> Counseling
<input type="checkbox"/> Daily Living Skills	<input type="checkbox"/> Daily Living Skills	<input type="checkbox"/> Executive Functioning Skills
<input type="checkbox"/> Expressive Language (SLI)	<input type="checkbox"/> Expressive/Receptive Language (SLI)	<input type="checkbox"/> Expressive/Social Language (SLI)
<input type="checkbox"/> Fine Motor Skills	<input type="checkbox"/> Fine Motor Skills	<input type="checkbox"/> Fluency of Speech (SLI)
<input type="checkbox"/> Fluency/Language (SLI)	<input type="checkbox"/> Functional Communication	<input type="checkbox"/> Functional Communication (SLI)
<input type="checkbox"/> Functional Math	<input type="checkbox"/> Functional Reading	<input type="checkbox"/> Functional Writing
<input type="checkbox"/> Gross Motor Skills	<input type="checkbox"/> Gross Motor Skills	<input type="checkbox"/> Language Comprehension
<input type="checkbox"/> Language Comprehension	<input type="checkbox"/> Language/Academic Readiness	<input type="checkbox"/> Life Skills
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Listening Comprehension and Oral Expression	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Math Calculation and Math Problem Solving	<input type="checkbox"/> Math Problem Solving	<input type="checkbox"/> Math Reasoning
<input type="checkbox"/> Motor Skills	<input type="checkbox"/> Nemeth Code Skills/Braille Math	<input type="checkbox"/> Occupational Therapy Services
<input type="checkbox"/> Oral Expression	<input type="checkbox"/> Orientation and Mobility Skills	<input type="checkbox"/> Personal / Work / Social Ethics
<input type="checkbox"/> Personal Social Skills	<input type="checkbox"/> Physical Therapy Services	<input type="checkbox"/> Pre-Braille Skills
<input type="checkbox"/> Reading Comprehension	<input type="checkbox"/> Reading Decoding	<input type="checkbox"/> Reading Decoding and Reading Comprehension
<input type="checkbox"/> Reading Decoding and Reading Fluency	<input type="checkbox"/> Reading Decoding, Fluency and Comprehension	<input type="checkbox"/> Reading Fluency and Reading Comprehension
<input type="checkbox"/> Reading Fluency Skills	<input type="checkbox"/> Receptive Language (SLI)	<input type="checkbox"/> Receptive/Social Language (SLI)
<input type="checkbox"/> Self Advocacy Skills	<input type="checkbox"/> Self Advocacy Skills	<input type="checkbox"/> Self Management
<input type="checkbox"/> Self-Advocacy Skills	<input type="checkbox"/> Social Language (SLI)	<input type="checkbox"/> Social Skills
<input type="checkbox"/> Spelling	<input type="checkbox"/> Study Skills	<input type="checkbox"/> Study/Organizational Skills
<input type="checkbox"/> Study/Organizational Skills	<input type="checkbox"/> Technology Skills	<input type="checkbox"/> Technology/Assistive Technology Skills
<input type="checkbox"/> Technology/Assistive Technology Skills	<input type="checkbox"/> Transition	<input type="checkbox"/> Transition Skills
<input type="checkbox"/> Travel Training	<input type="checkbox"/> Visual Efficiency Skills	<input type="checkbox"/> Voice (SLI)
<input type="checkbox"/> Workplace / Job Readiness Skills	<input type="checkbox"/> Written Expression	<input type="checkbox"/> Written Expression and Spelling

Primary Disability <input type="checkbox"/> ↔ <input type="checkbox"/>	
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Developmental Delay
<input type="checkbox"/> Emotional Disturbance	<input type="checkbox"/> Giftedness
<input type="checkbox"/> Hearing Impairment	<input type="checkbox"/> Mental Retardation
<input type="checkbox"/> Multiple Disabilities	<input type="checkbox"/> Orthopedic Impairment

IEP-DIS-00: IEP Disability Report Interface Screen

**Report Options:**

- **Role** – Select the options to limit the report to the selected roles.
- **Primary Ethnic Code** – Select the options to limit the report the selected codes.
- **Participation** – Select to limit the report to the selected participation type.
- **IEP Status** – Select the options to limit the report to the selected IEP status.
- **Grade Level** – Select the options to limit the report to the selected grades.
- **Primary Disability** – Select the options to limit the report to the selected disabilities.
- **Service** – Select the options to limit the report to the selected services.

## IEP-DIS-01: IEP Disability Report by Case Manager and School

### Synergy SE > Student > Reports

The IEP Disability report prints a list of all students that include selected details of their current, previous, and draft IEPs. The list is sorted by case manager, then by school. The report includes student name, student ID, grade, IEP and triennial dates, school, and disability and services provided.

**Report IEP-DIS-01: IEP Disability (Sort by Case Carrier and School)**

Print Save Default Reset Saved Default Email Me

Name: IEP Disability (Sort by Case Carrier and School) Number: IEP-DIS-01 Page Orientation: Landscape

Filters School Filter Sort / Output Conditions Selection Advanced

Staff Last Name Staff First Name

Role

Teacher of DHH  Case Carrier  Psychologist  Teacher Specialist

Speech/Language Therapist  Literacy Specialist  Early Interv. Trans. Specialist  Autism Specialist

Assistive Technology Specialist  Occupational Therapist  Physical Therapist  Behavior Intervention Specialist

Full Inclusion Specialist  School Nurse  Adapted PE Teacher  Other

Orient./Mobility Specialist  General Ed Teacher  Special Ed Teacher  Administrator

Assessor  Teacher of Visually Impaired  Reader  BICM

Primary Ethnic Code

American Indian or Alaska Native  Asian  Black or African American  Native Hawaiian or Other Pacific Islander  White

Participation

Miscellaneous

ESY ELL ITP

IEP Status

Current  Draft  Previous

Disagree  Proposal  FAPE Offer

Did Not Sign  Temporary  On Hold

Translation  Stopped

Grade Level

09  10  11  12

Primary Disability <input type="checkbox"/> ↔ <input type="checkbox"/>		
<input type="checkbox"/> Deaf-Blindness	<input type="checkbox"/> Developmental Delay	
<input type="checkbox"/> Emotional Disturbance	<input type="checkbox"/> Giftedness	
<input type="checkbox"/> Hearing Impairment	<input type="checkbox"/> Mental Retardation	
<input type="checkbox"/> Multiple Disabilities	<input type="checkbox"/> Orthopedic Impairment	
<input type="checkbox"/> Other Health Impairment	<input type="checkbox"/> Specific Learning Disability	
<input type="checkbox"/> Speech / Language Disabilities	<input type="checkbox"/> Traumatic Brain Injury	
<input type="checkbox"/> Visual Impairment		

Service <input type="checkbox"/> ↔ <input type="checkbox"/>		
<input type="checkbox"/> Adapted Physical Education	<input type="checkbox"/> Adaptive Skills	<input type="checkbox"/> Adult Living Preparation
<input type="checkbox"/> Advocacy Skills	<input type="checkbox"/> Aide Svcs - Personal Care/ADL	<input type="checkbox"/> Aide Svcs - Reinforcement of Behav/Psych-Soc Go
<input type="checkbox"/> Aide Svcs - Reinforcement of O/T Goals	<input type="checkbox"/> Aide Svcs - Reinforcement of P/T Goals	<input type="checkbox"/> Aide Svcs - Reinforcement of Speech/Language Gd
<input type="checkbox"/> Anger Management	<input type="checkbox"/> Artic/Language (SLI)	<input type="checkbox"/> Articulation of Speech Sounds (SLI)
<input type="checkbox"/> Audiological Evaluation	<input type="checkbox"/> Basic Reading Skills	<input type="checkbox"/> Behavior Management
<input type="checkbox"/> Behavioral Health	<input type="checkbox"/> Braille Reading	<input type="checkbox"/> Braille Writing
<input type="checkbox"/> Career Development Skills	<input type="checkbox"/> Cognitive Skills	<input type="checkbox"/> Communication Skills
<input type="checkbox"/> Community Skills	<input type="checkbox"/> Compensatory Skills	<input type="checkbox"/> Conflict Resolution Strategies
<input type="checkbox"/> Consultative Services	<input type="checkbox"/> Coping Strategies	<input type="checkbox"/> Counseling
<input type="checkbox"/> Daily Living Skills	<input type="checkbox"/> Daily Living Skills	<input type="checkbox"/> Executive Functioning Skills
<input type="checkbox"/> Expressive Language (SLI)	<input type="checkbox"/> Expressive/Receptive Language (SLI)	<input type="checkbox"/> Expressive/Social Language (SLI)
<input type="checkbox"/> Fine Motor Skills	<input type="checkbox"/> Fine Motor Skills	<input type="checkbox"/> Fluency of Speech (SLI)
<input type="checkbox"/> Fluency/Language (SLI)	<input type="checkbox"/> Functional Communication	<input type="checkbox"/> Functional Communication (SLI)
<input type="checkbox"/> Functional Math	<input type="checkbox"/> Functional Reading	<input type="checkbox"/> Functional Writing
<input type="checkbox"/> Gross Motor Skills	<input type="checkbox"/> Gross Motor Skills	<input type="checkbox"/> Language Comprehension
<input type="checkbox"/> Language Comprehension	<input type="checkbox"/> Language/Academic Readiness	<input type="checkbox"/> Life Skills
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Listening Comprehension and Oral Expression	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Math Calculation and Math Problem Solving	<input type="checkbox"/> Math Problem Solving	<input type="checkbox"/> Math Reasoning
<input type="checkbox"/> Motor Skills	<input type="checkbox"/> Nemeth Code Skills/Braille Math	<input type="checkbox"/> Occupational Therapy Services

IEP-DIS-01: IEP Disability Report Interface Screen

**Report Options:**

- **Role** – Select the options to limit the report to the selected roles.
- **Primary Ethnic Code** – Select the options to limit the report the selected codes.
- **Participation** – Select to limit the report to the selected participation type.
- **IEP Status** – Select the options to limit the report to the selected IEP status.
- **Grade Level** – Select the options to limit the report to the selected grades.
- **Primary Disability** – Select the options to limit the report to the selected disabilities.
- **Service** – Select the options to limit the report to the selected services.

## RSK01: Risk Report

### Synergy SE > Student > Reports

The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by school (new page per location), with case manager name and phone, and due date and days remaining until the event.

RSK01: Risk Report Report Interface Screen

### Report Options:

- **Number of Days** – Enter the number of days to look for students with upcoming IEP reviews.

Edupoint		Hope High School				Year: 2011-2012			
School: Adams Elementary		Risk Report				Report: RSK01			
Case Carrier: User, Admin									
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Jack, Chris E.	08/18/2005	135183	SPEECH/LANGUAGE IMPAIRED	User, Admin	unspecified	02/10/2012	-40	02/10/2012	-40
Martinez, Henry E.	11/28/2003	148655	SPEECH/LANGUAGE IMPAIRED	User, Admin	unspecified	02/27/2011	-388	02/26/2013	341
Case Carrier: Wilson, Rob									
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Aaron, Ian	04/12/2002	129442	DEVELOPMENTAL DELAY	Wilson, Rob	480-555-1234	11/05/2012	228	01/23/2015	1037

Risk Report, RSK01

## RSK02: Risk Report

### Synergy SE > Student > Reports

The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.

*RSK02: Risk Report Interface Screen*

### Report Options:

- **Number of Days** – Enter the number of days to look for students with upcoming IEP reviews.

Edupoint		Hope High School				Year: 2011-2012			
		Risk Report				Report: RSK02			
Case Carrier: User, Admin									
School: Hope High School									
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/16/2012	-101	12/17/2013	508

*RSK02: Risk Report Output*

## RSK03: Risk Report

### Synergy SE > Student > Reports

The Risk Report lists all special education students who have a triennial review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.

RSK03: Risk Report Interface Screen

### Report Options:

- **Number of Days** – Enter the number of days to look for students with upcoming triennial reviews.

Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/18/2012	-101	12/17/2013	506	Hope High School

RSK03: Risk Report Output

## RSK04: Risk Report

### Synergy SE > Student > Reports

The Risk Report lists all special education students who have an annual review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.

RSK04: Risk Report Interface Screen

### Report Options:

- **Number of Days** – Enter the number of days to look for students with upcoming annual reviews.

Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/16/2012	-101	12/17/2013	506	Hope High School

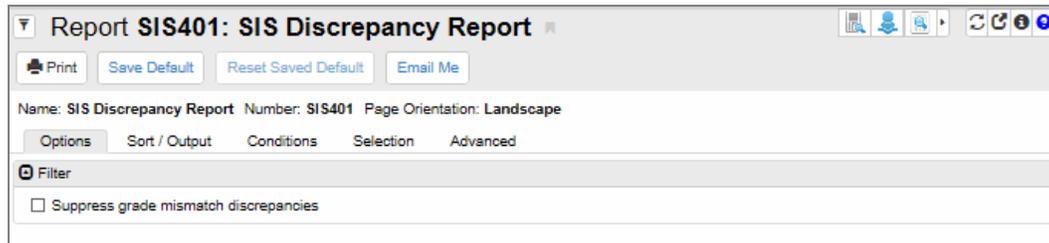
RSK04: Risk Report Output

## SIS401: SIS Discrepancy Report

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### Synergy SE > Student > Reports

If Synergy SE is used in conjunction with a student information system other than Synergy SIS, the report lists differences in the data between the two.



*SIS401: SIS Discrepancy Report Interface Screen*

### Report Options:

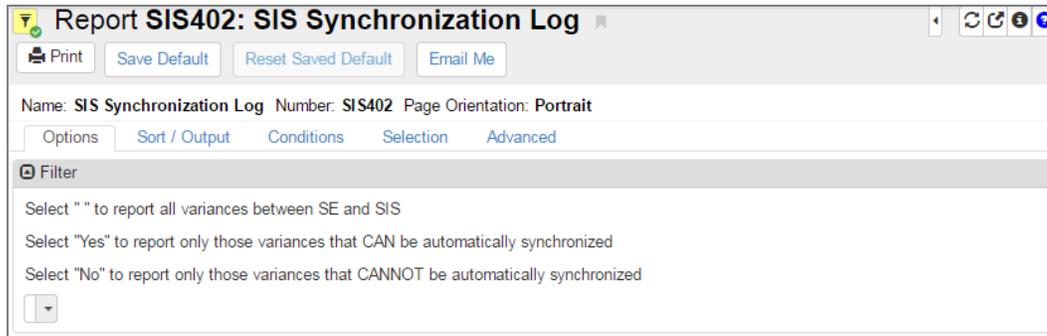
- **Suppress grade mismatch discrepancies** – Select this option to not show discrepancies with a student's grade.

## SIS402: SIS Synchronization Log

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### Synergy SE > Student > Reports

If Synergy SE is used in conjunction with a student information system other than Synergy SIS, the report lists synchronization events.



*SIS402: SIS Synchronization Log Report Interface Screen*

### Report Options:

- Make no selection to report all variances between Synergy SIS and the student information system
- Select Yes to report only variances that can be automatically synchronized
- Select No to report only variances that cannot be automatically synchronized

## STU-001: Student Listing

### Synergy SE > Student > Reports

Lists Student Name, Gender, Grade Phone and Address of Students according to the Focus (for example, School or District) according to parameters specified.

STU-001: Student Listing Report Interface Screen

### Report Options:

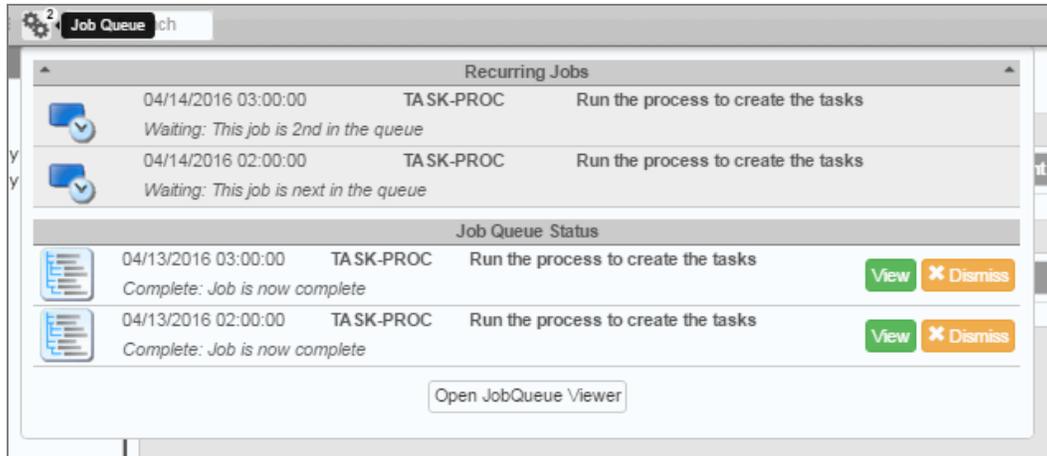
- **Grade** – Select to filter students for a specific grade.
- **Gender** – Select to filter students by gender.
- **Student ID** – Enter the student's ID to get a report for a specific student.

Edupoint		Edupoint School District			Year: 2009-2010	
		Student Listing			Report: STU-001	
Student Name	Gender	Grade	Phone	Address		
Laffoon, Craig E.	Male	03	602-555-7245	1006 W 7th St		
				Mesa	AZ	
				85612		
Martinez, Henry E.	Male	03	602-555-8413	948 N Revere		
				Mesa	AZ	
				85612		
Total Students:		2				

STU-001: Student Listing Output

## Job Queue Viewer

Use the Job Queue Viewer screen to review print job status information and to print the report output file in the desired format. The Job Queue Viewer screen stores selected reports for later viewing/printing/deleting. It displays jobs completed, including reports run and mass updates.



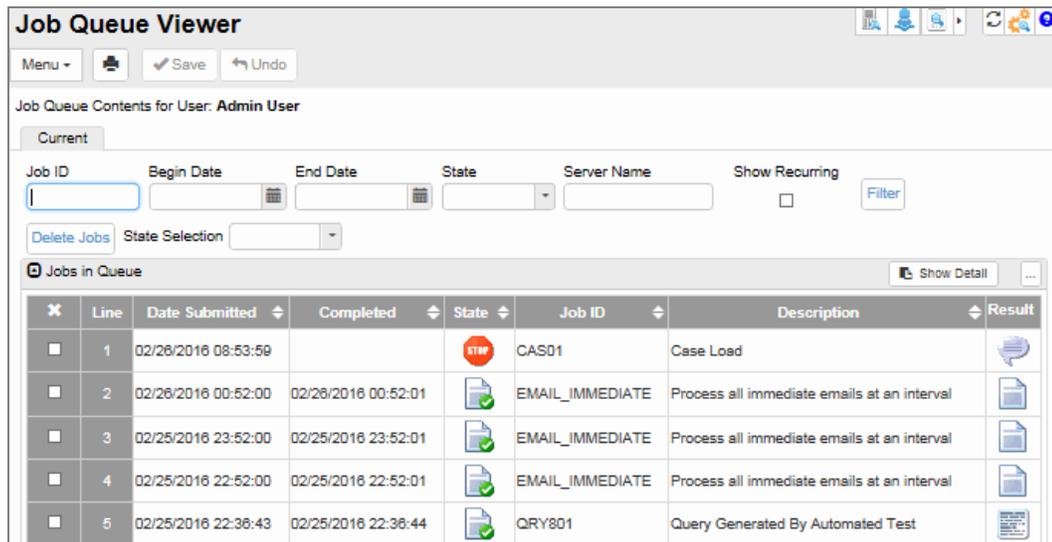
Job Queue

1. Click  to view the Job Queue.



The Job Queue only displays the reports for the user that is logged in.

2. Click **Open Job Queue Viewer**.



Job Queue Viewer Screen

The Job Queue Viewer screen displays with the state and result of the job.

The State icons indicate:		The Result icons indicate:	
	Processing		Print Job Status
	Waiting		Data Job Complete
	Canceled		Print Job Complete
	Complete		File Does Not Contain Data
	Error		File Does Not Contain Data

3. (Optional) Filter the jobs:
  - **Job ID** to filter on a Job ID includes the Report ID such as CAS01 or Job Name.
  - **Begin Date** to filter on a specific date.
  - **End Date** to filter on a specific date.
  - **State** to filter based on the state of the job. The choices are: **Canceling, Complete, Deleted, Error, Hold, In Progress, and Waiting.**
  - **Server Name** to select a specific server running the job.
  - **Show Recurring** to select jobs that run at intervals such as daily, weekly, or monthly.
4. Click **Filter**. The information displays on the Jobs in Queue section.
5. Click the icon in the Result column to view the report, result or click **Show Detail** to view information that includes Details, Recurring Pattern, Results, and System Info.

## Deleting Jobs

From the Job Queue Viewer screen

- To delete a job:
  1. Select the checkbox in the **X** column. More than one selection is permitted.
  2. Click **Save**.
- To delete multiple jobs of the same type:
  1. Select a **State Selection** from the drop-down. The choices are: *All, Complete, Error, Hold, In Progress, and Waiting.*
  2. Click **Delete Jobs**.