User Guide for Michigan

Release 2018.01

December 2017

SEMIUG-031516

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: • *Translation of Documents* • *Introduction to the Portfolio Screen* • *Accessing and Editing Student Data and Information* Added: • *Progress Reports*

Document Version	Release Date	Software Release	Description
5.0	Dec 2018	2018.01	• Added APM-1 - Automatic Process Moves Report • Moved the *Managing SE Documents* chapter to the *Synergy SE – Documents Guide* for your state • Added Exited field to Admin Progress Report

Table of Contents

Chapter 1: Synergy SE Overview

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.

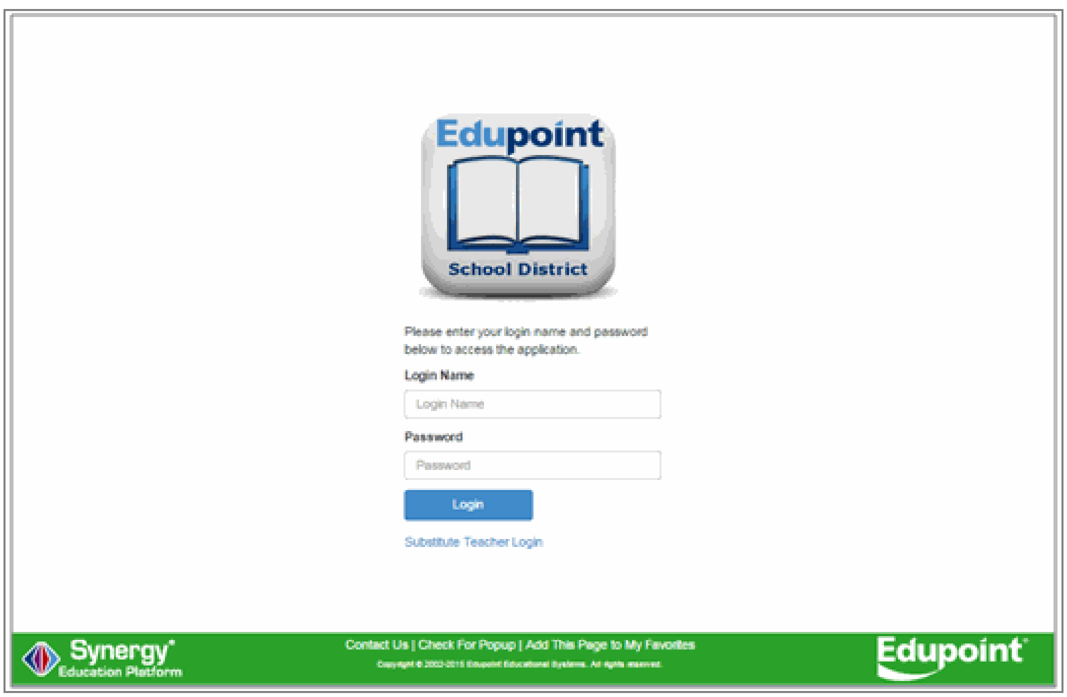
This user guide explains Synergy SE where special education student demographic and report data is recorded. Special education student reports can also be generated here.

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**.

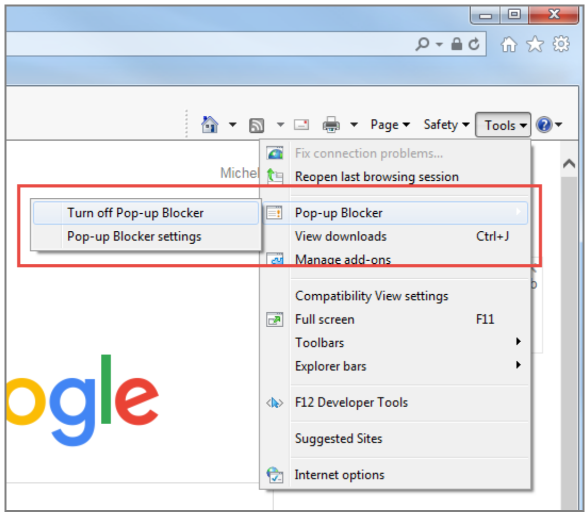


Login Screen

Disable Pop-Up Blockers

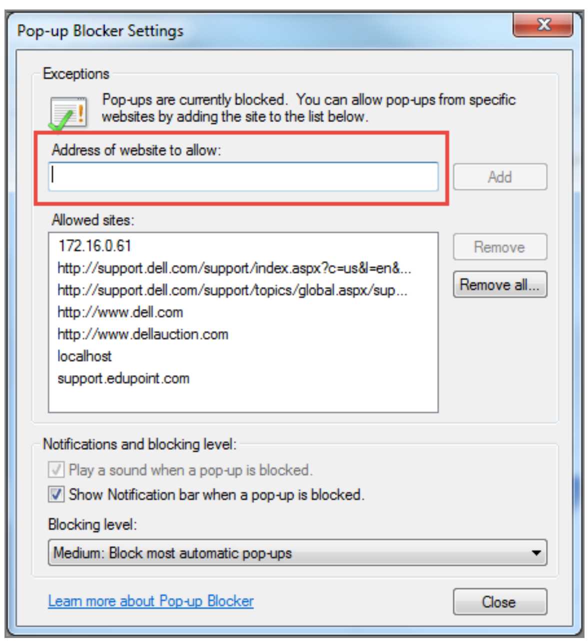
The Synergy SE software does not support the use of Pop-Up Blockers in browsers. Disable any Pop-Up Blockers before logging into the Synergy SE software.

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



Internet Explorer – Tools Menu

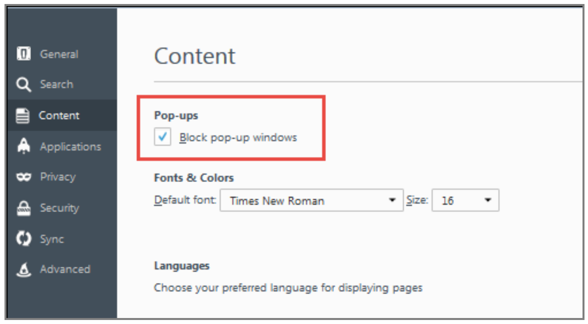
- Select **Tools > Pop-up Blocker >Pop-up Blocker Settings** and add the URL address for Synergy SE in**Address of website to allow**.



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 .

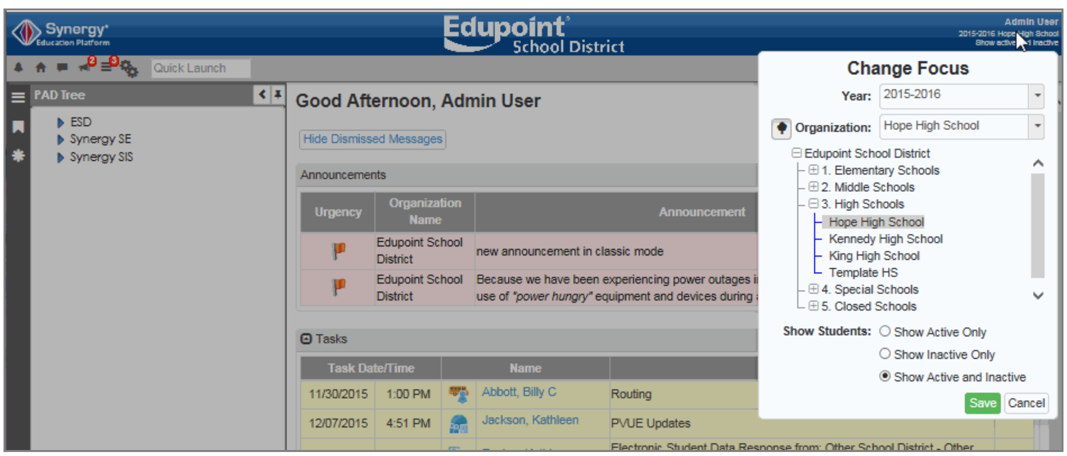
- FireFox:
  1. Click and select **Options**.
  2. Select **Content**.
  3. Select **Block pop-up windows**.



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.

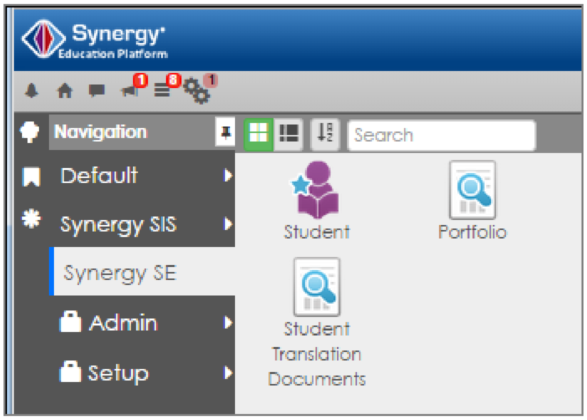


Synergy SE Home Screen, Change Focus

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**.

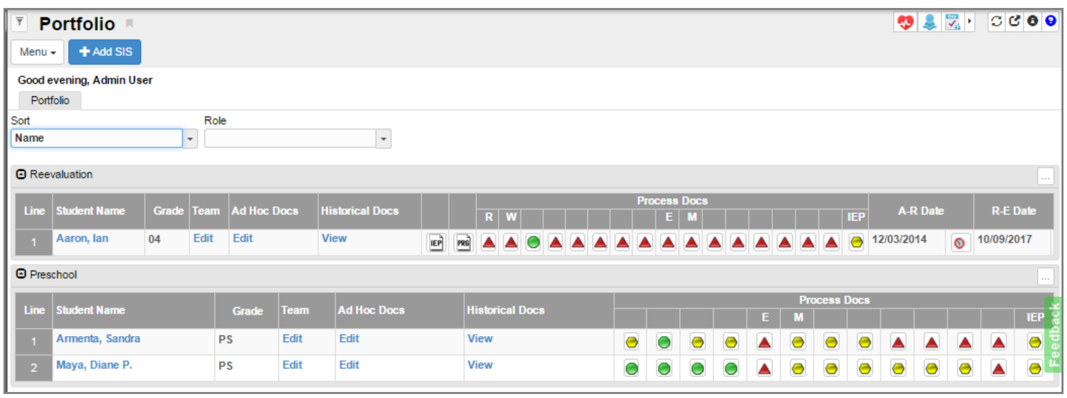
Navigating in Synergy SE

You navigate through the system based on the security level set by the administrator. After logging into Synergy SE, various options are available based on your user security setup.



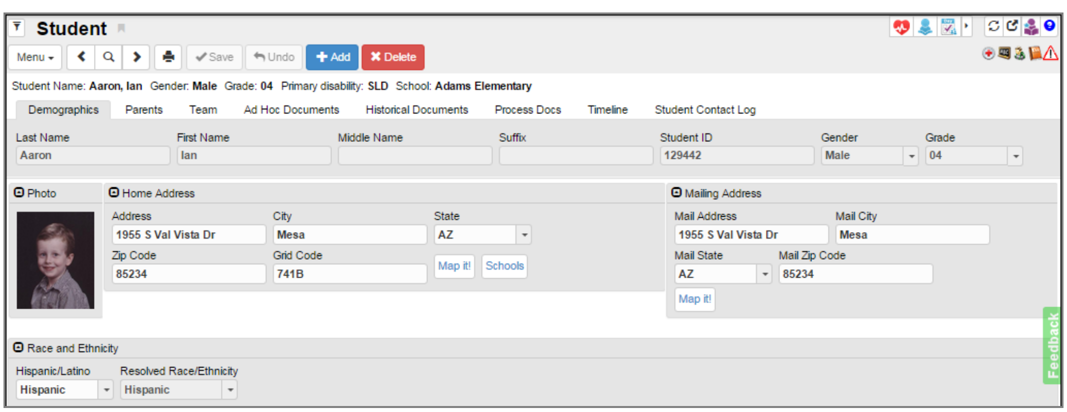
Navigation Panel

- Choose Portfolio if your security level allows you to be added to student's Team to see a student's progress for each Team you belong to.



Portfolio Screen

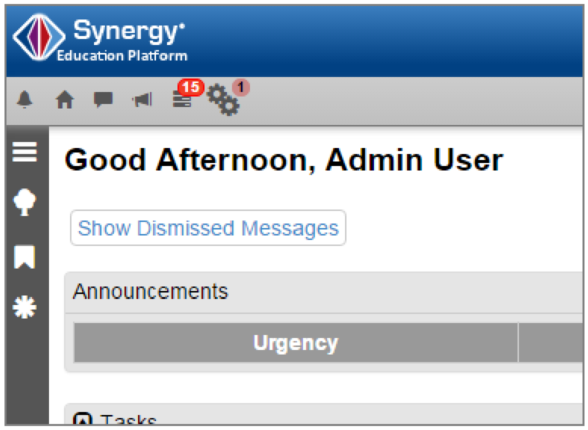
- Choose Student if you are a user who is not added to the Team to access a student's special education records or to access SE student information not available in the Portfolio.



Student Screen

Title Bar Icons

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

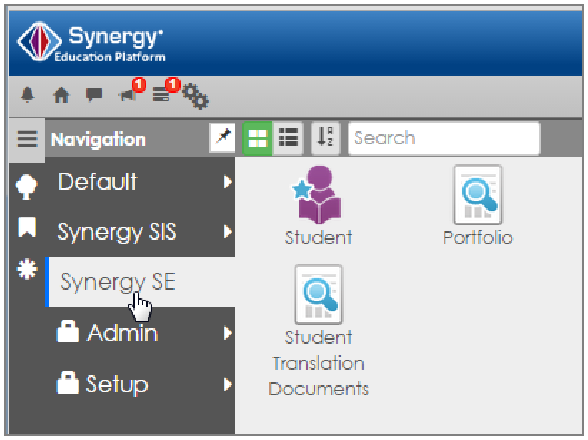


Home Screen

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

Navigation Panel

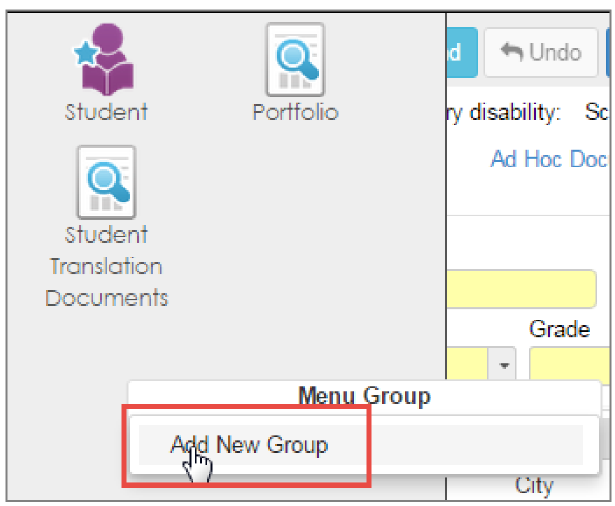
Use the Navigation panel to access shortcuts in Synergy SE.



Navigation Panel

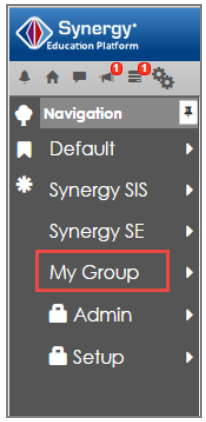
Editing the Navigation Panel

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



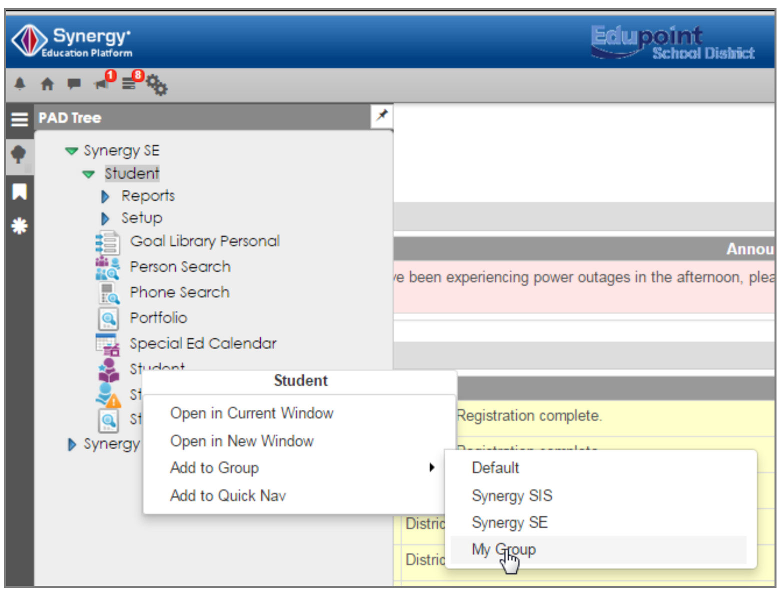
Navigation Panel

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



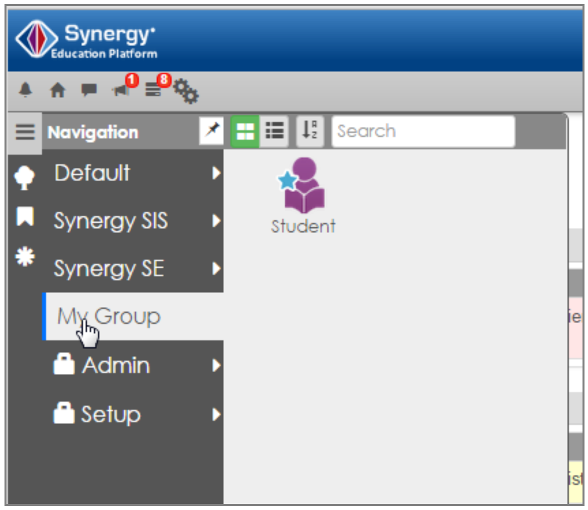
Navigation Panel

- 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**.



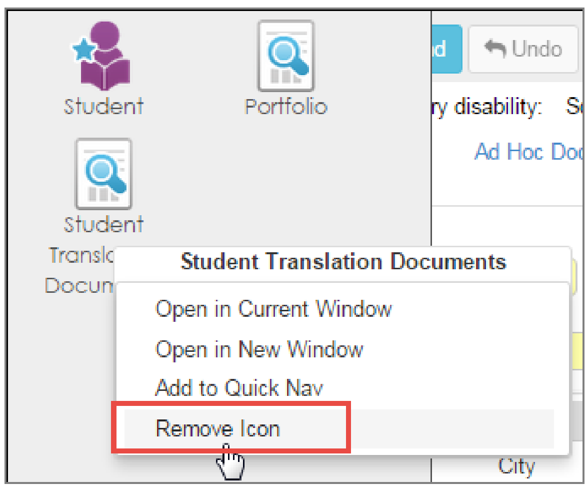
Add Icon To Group

The icon is added to your group.



Navigation Panel, Added Group

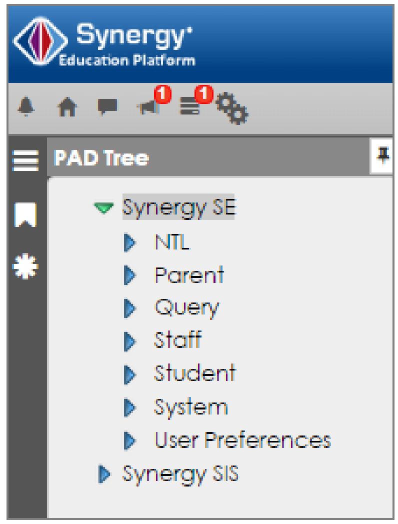
- To delete an icon, right-click the icon and select *Remove Icon*.



Navigation Panel

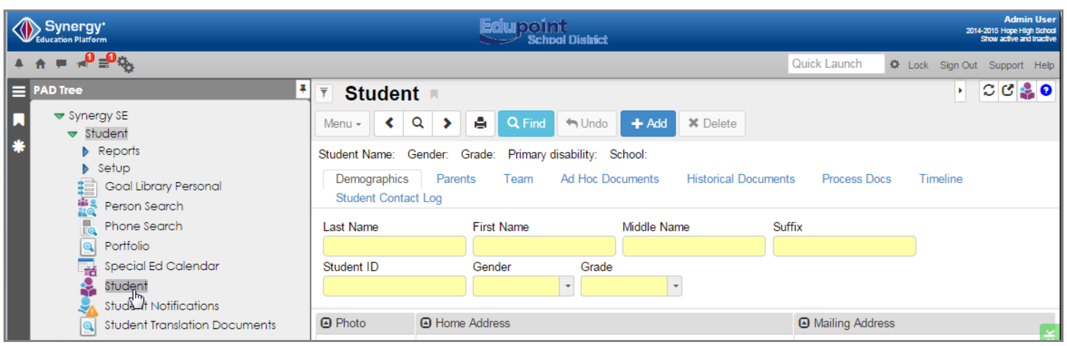
PAD Tree

1. Click ▶ to toggle the menus.



PAD Tree

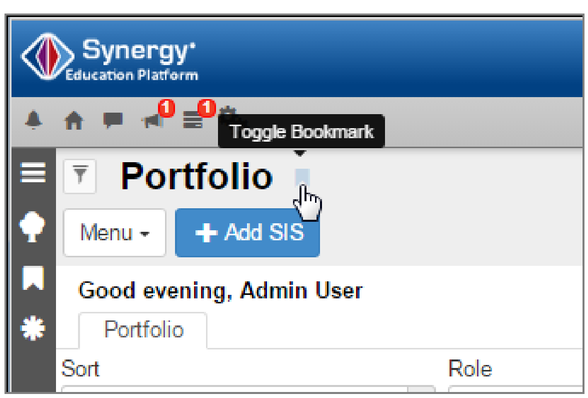
2. Select a screen to display.



PAD Tree

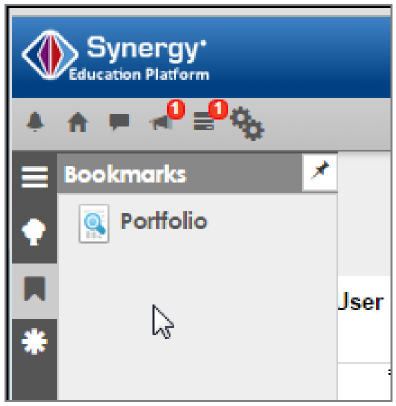
Bookmarks Panel

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



Adding A Bookmark

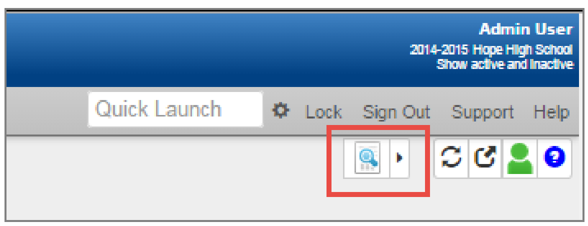
The view displays in the Bookmarks panel.



Bookmarks Panel

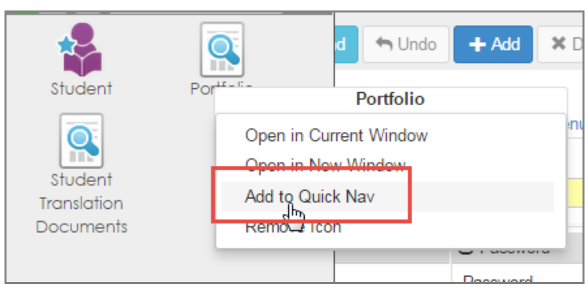
Quick Navigation Bar

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



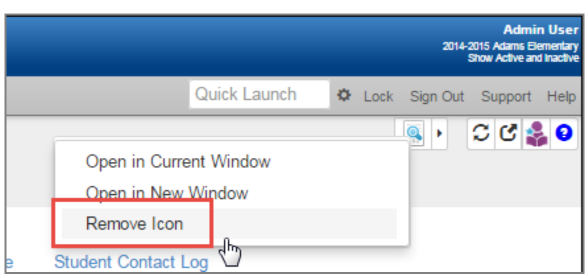
Quick Navigation Bar

- 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*.

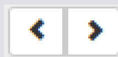


Quick Navigation Bar

Icons and Buttons

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

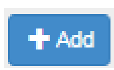
Click the icon to clear the record and activate the **Find** button.



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.

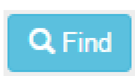


The **Add** button displays on the Action Bar with various views.

Click the button to add a record to the view.

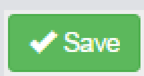
The **Delete** button displays on the Action Bar with various views.

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.



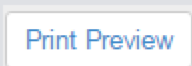
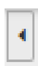
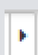
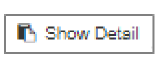
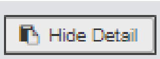
The **Save** button displays on the Action Bar when the information has been modified in a field on the current view.

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.
	he **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.

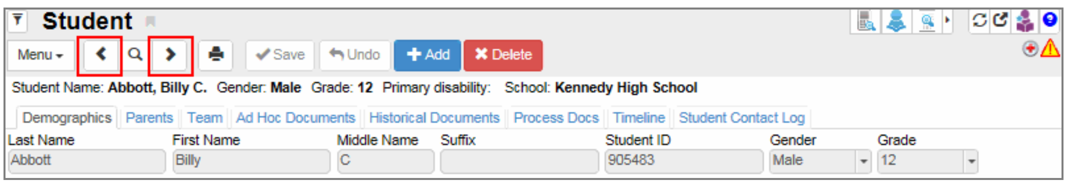
Finding and Sorting Records

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.

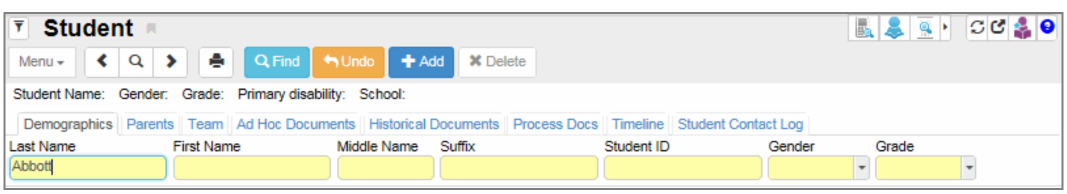


Student Screen

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.



Student Screen

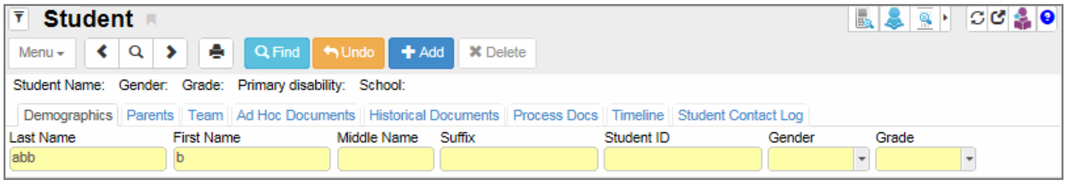
3. Click **Find** or **Enter**. The first record with that information displays.

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.



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:

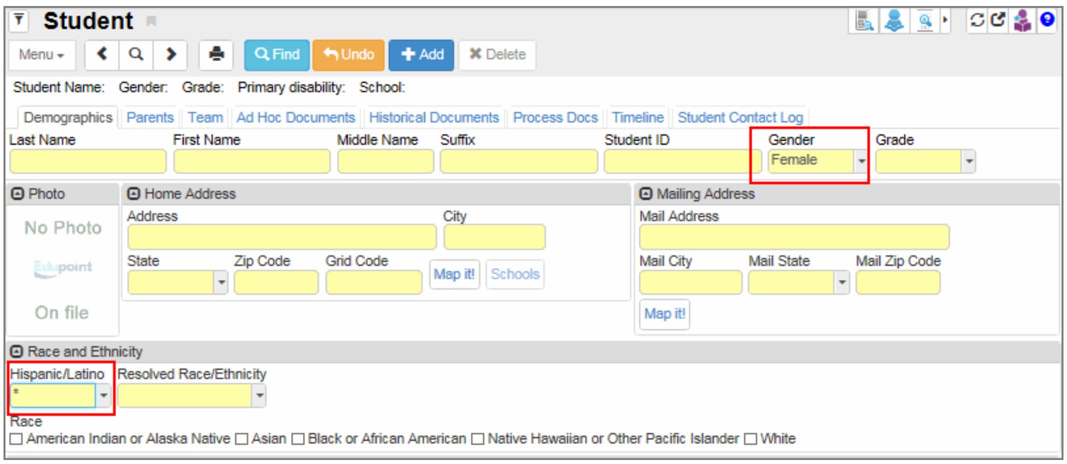
- Primary field left blank.
- Asterisk (*) placed in any field.
- A specific selection is made from a drop-down. For example, Female is selected from the Gender drop-down.

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.

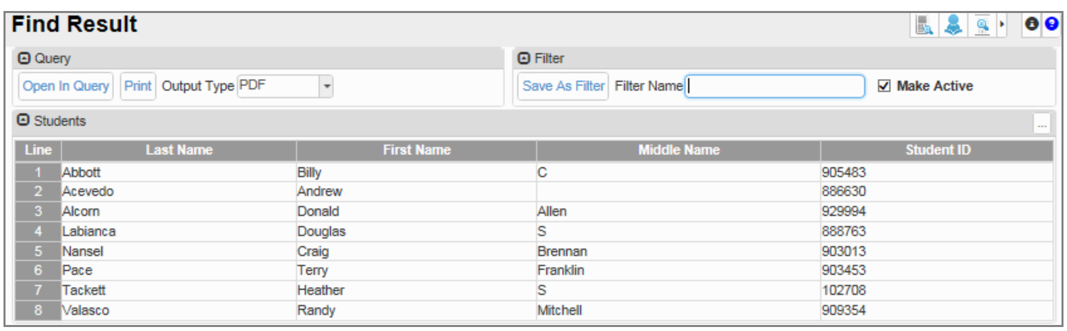
   The placement of the asterisk (*) in the field controls how the existing information entered in the field is matched to the records.

   - 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.

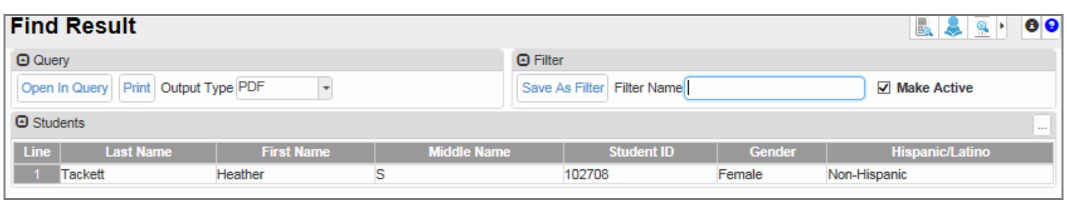


Student Screen

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

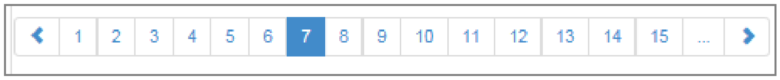


Find Result Using Empty Fields



Find Result Using Asterisk

4. Select a line to display the record.

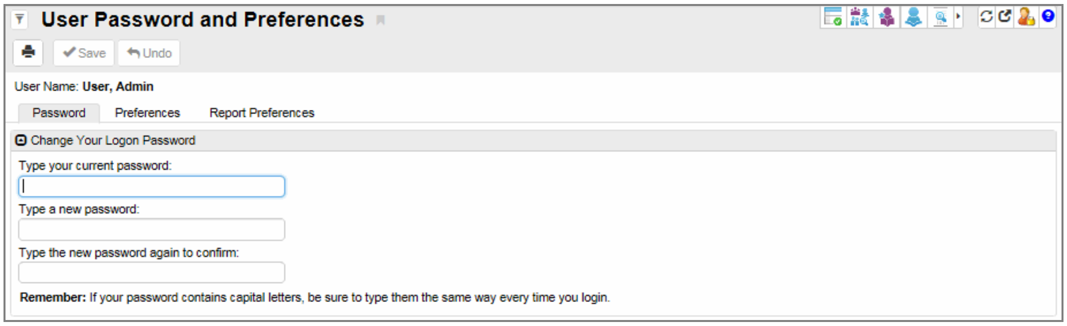
> If more than one page of records match the criteria, the additional page numbers are displayed at the bottom of the Find Results screen.
>
> 
>
>
> *Find Result Screen*

- 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

Changing Password



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

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.

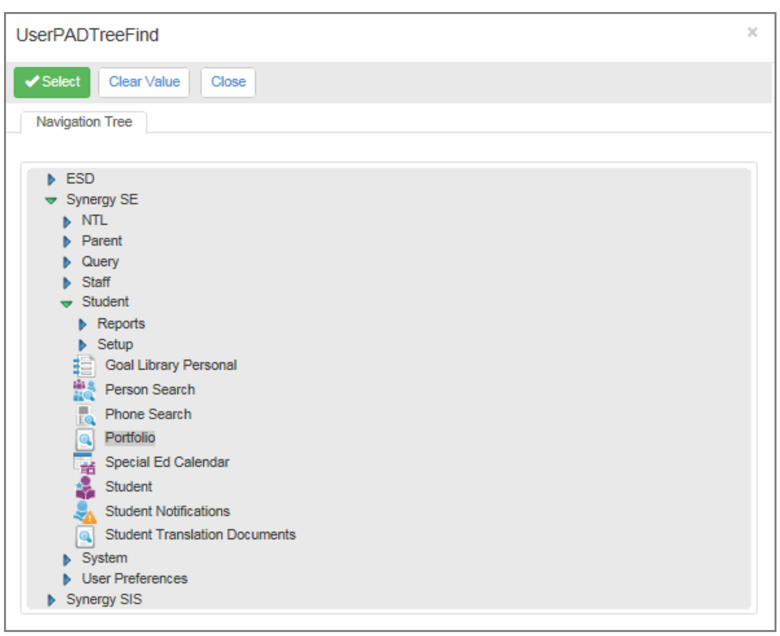
1. Navigate to **Synergy SE > User Preferences > User Password and Preferences**.
2. Select the **Preferences** tab:
   - To change the number of pages displayed in a search, enter a number in **Paging Size**. The default is 15.
   - To change the number of records displayed on a page, enter a number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

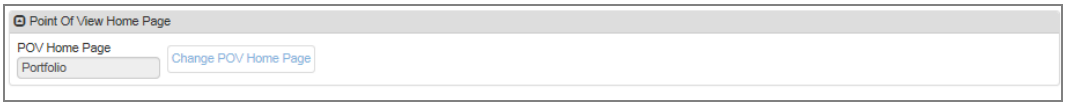
To change the POV home page:

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

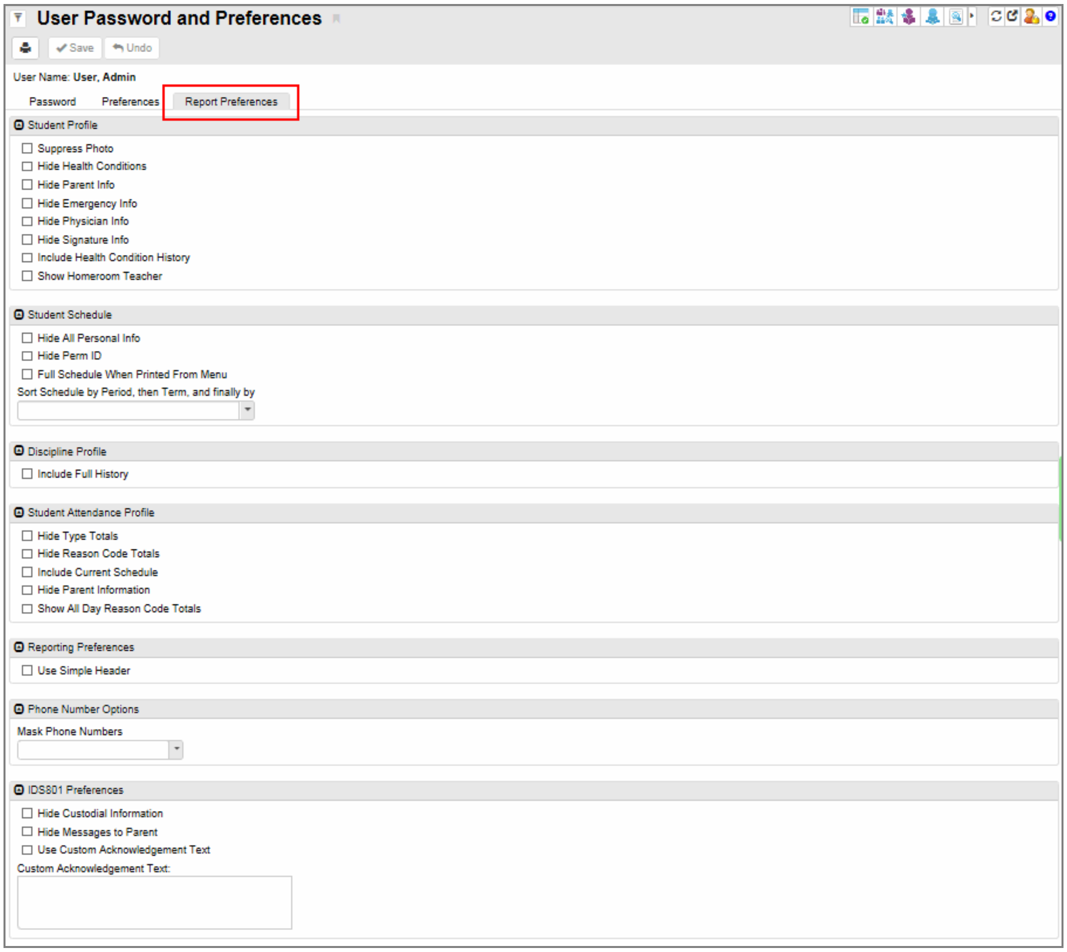
If you have access to Synergy SIS, TeacherVUE, and Synergy SE, you can select which application displays first after you log in:

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**.

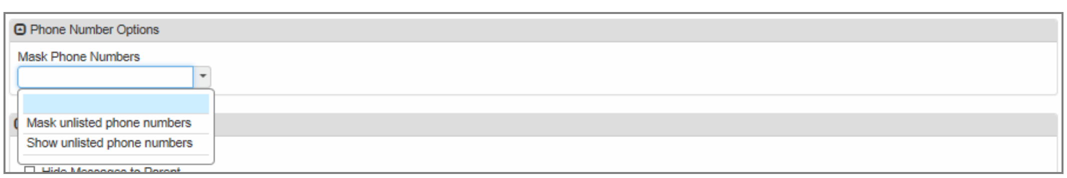
Report Preferences

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



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.



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.

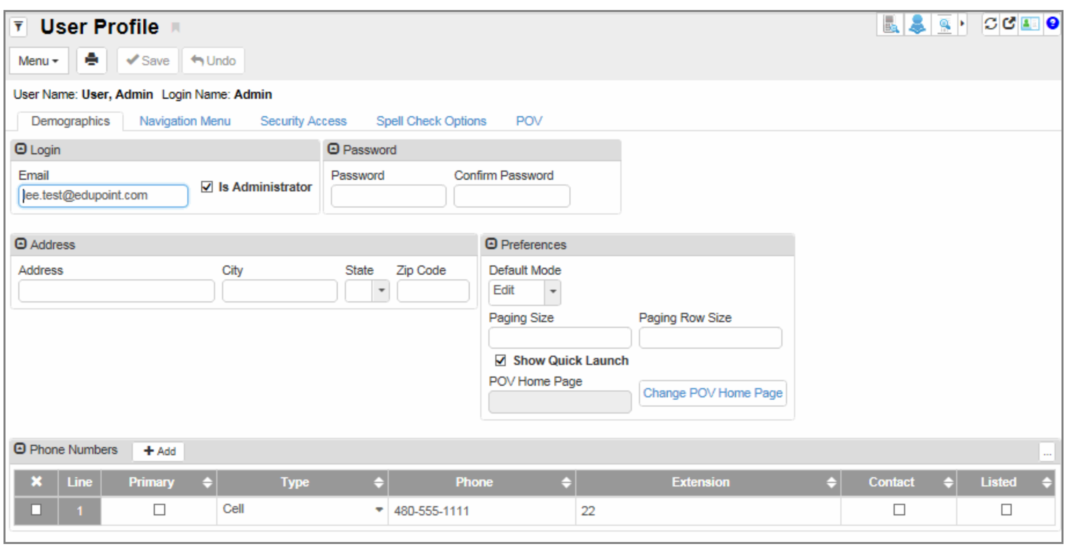
4. Click **Save**.

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.



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

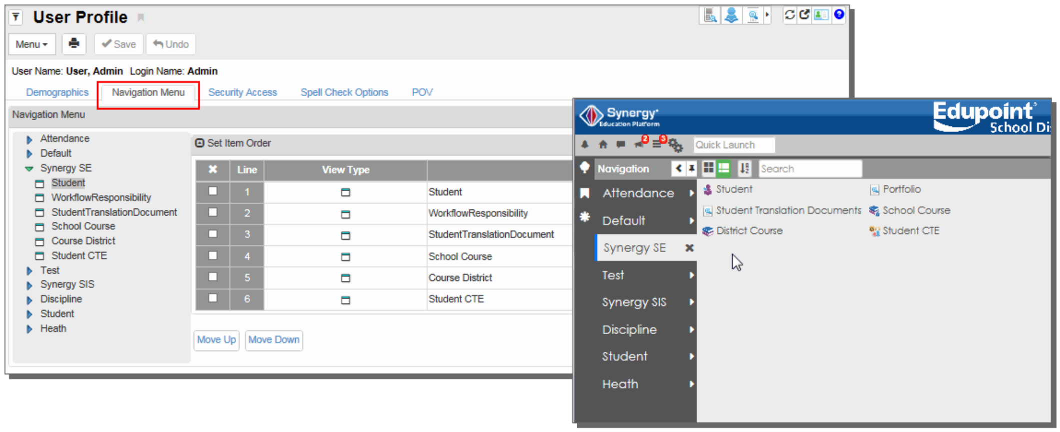
     - Set the **Paging Size**, **Paging Row Size**, and **POV Home Page**.

     > 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 t 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**.

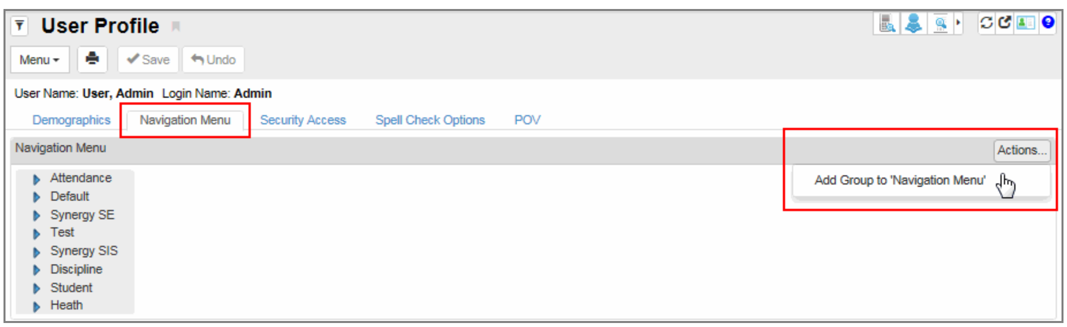
Navigation Menu Tab

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.

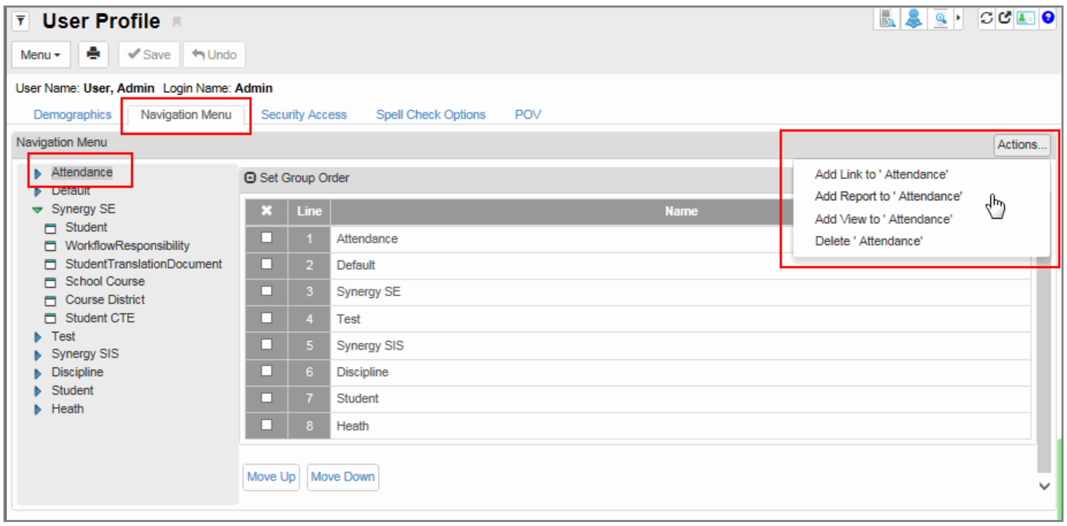
4. Enter a name for the toolbar.
5. Click **Save**. The new group displays in the Navigation Tree.
6. (Optional) Adjust the group order.
   a. Select the line number of the group to highlight.
   b. Click **Move Up** or **Move Down** until the
   c. Repeat until the groups are in the desired order.

7. 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

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

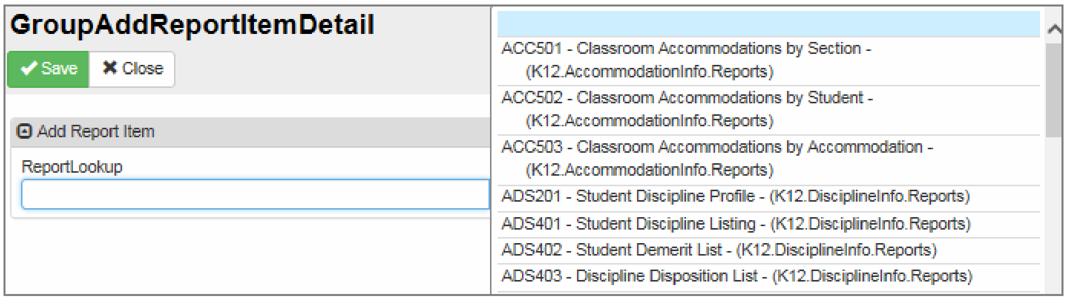


User Profile Screen

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

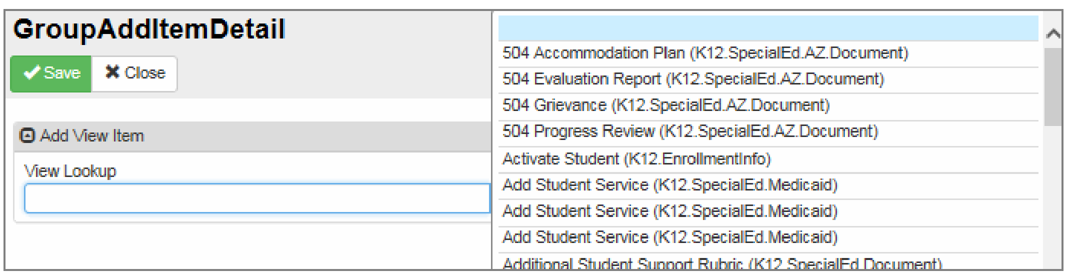
GroupAddLinkDetail Screen

- 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

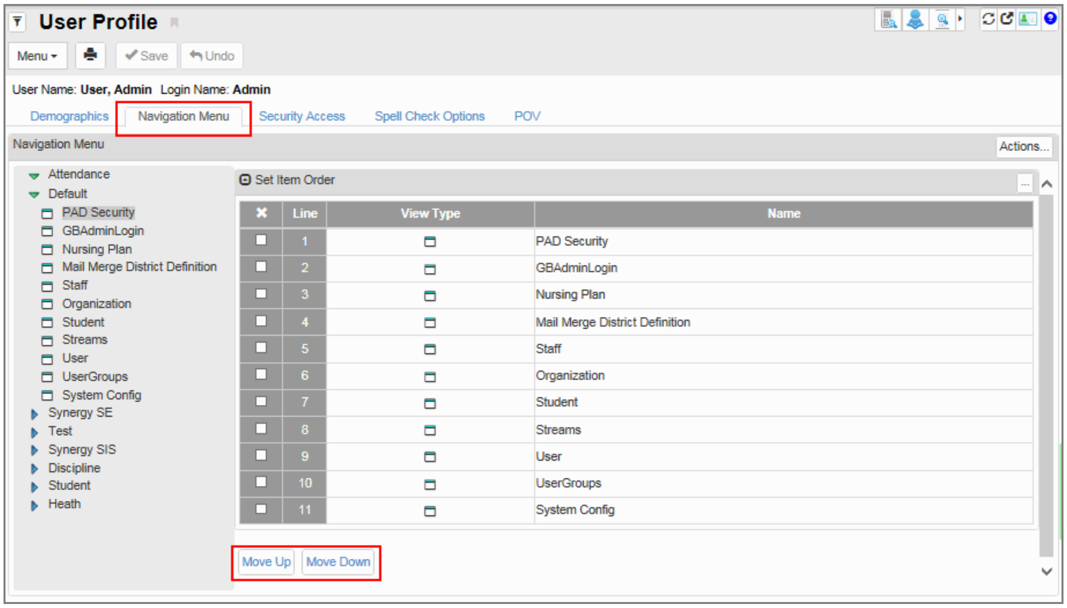
- To add a view:
  a. Select *Add View to 'Group Name'* from the **Actions** menu. The GroupAddItemDetail screen displays.
  b. Select a view from the **View Lookup** drop-down.
  c. Click **Save**.



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.



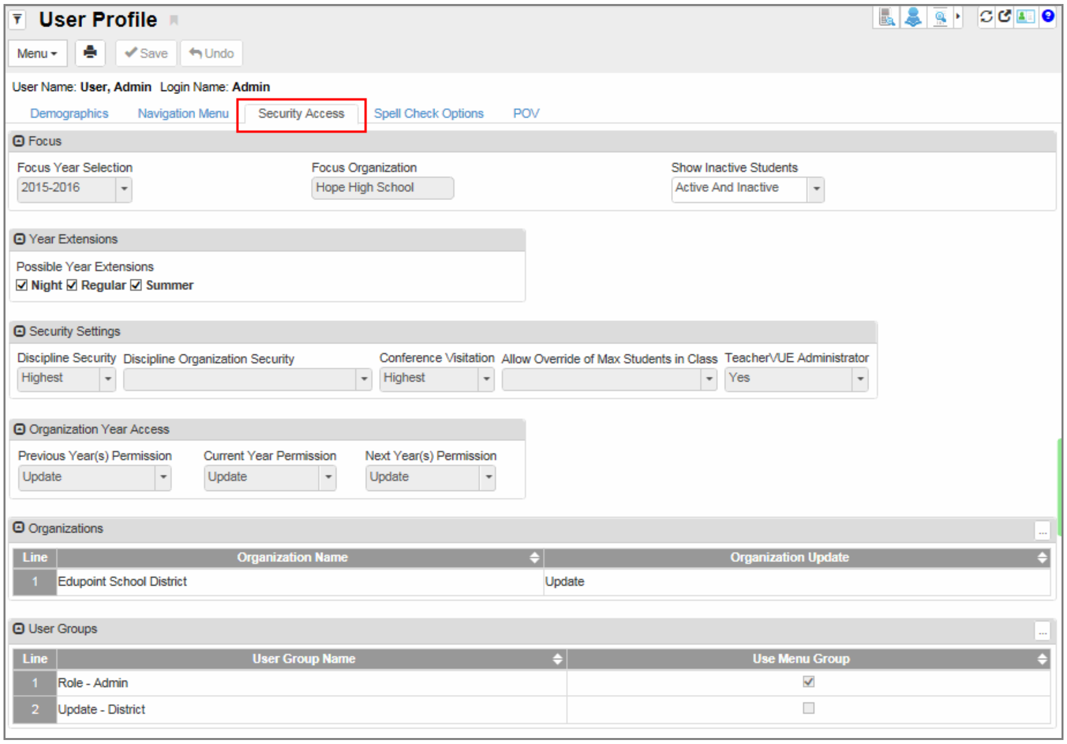
User Profile Screen

6. Click **Save**.

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

Security Access Tab

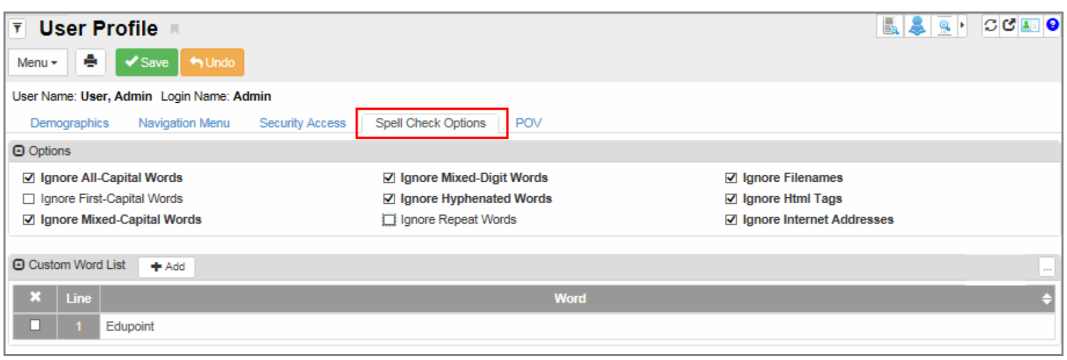
The **Security Access** tab displays some of the security assigned to your account. You probably cannot change this information.



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.



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**.

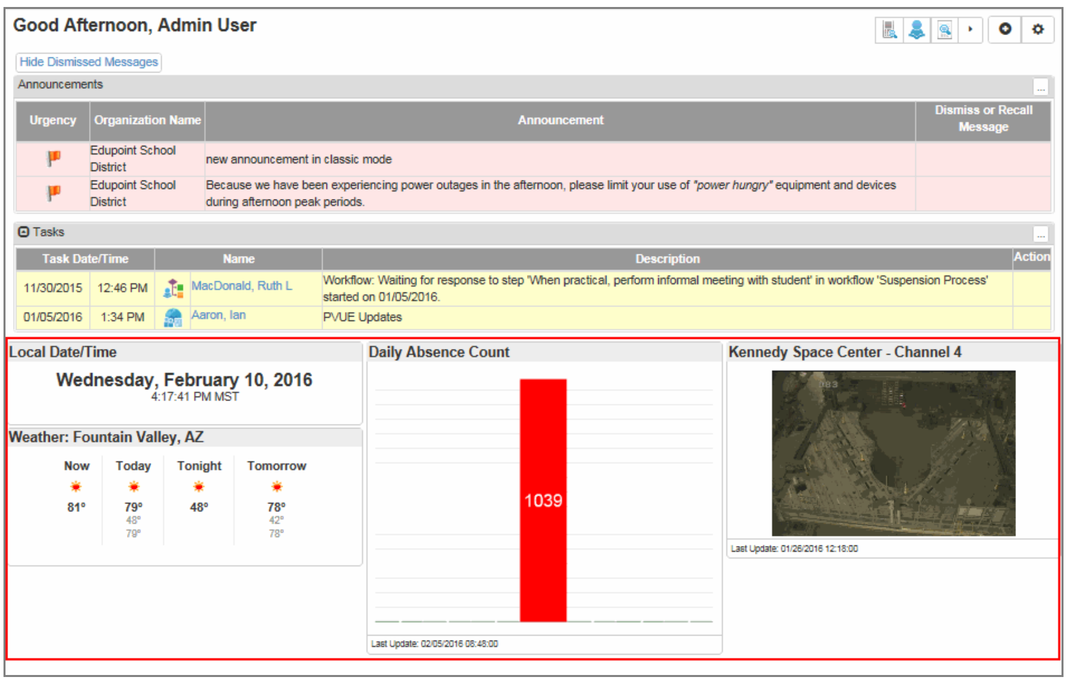
> To delete a custom word, check the box in the **X** column.

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



Home Screen

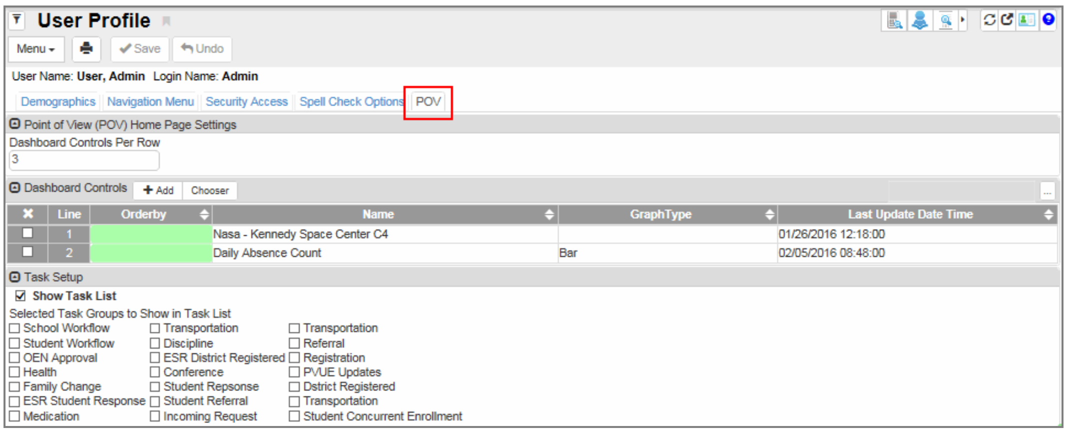
> Some items that display on the home screen are selected by the administrator.

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

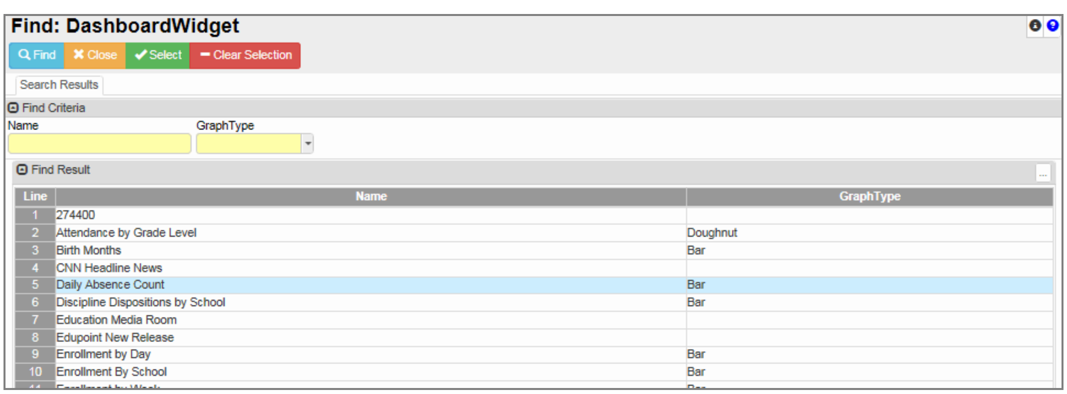


User Profile Screen, POV Tab

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.

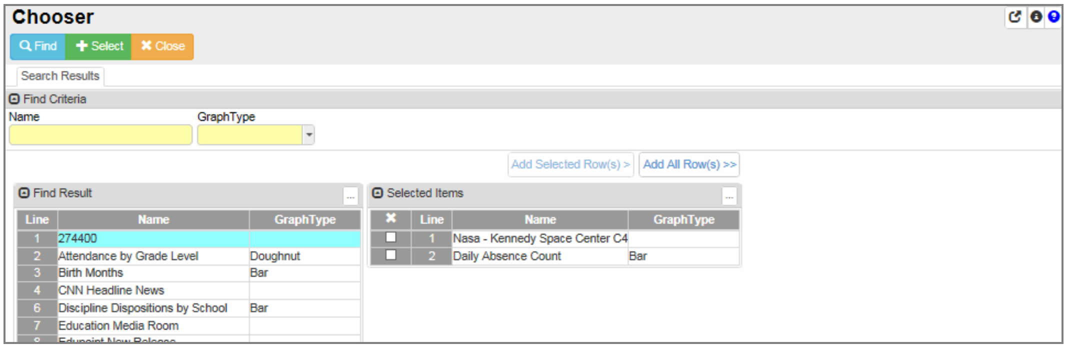
> An RSS Feed widget always takes the entire row regardless of the columns selected.

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.

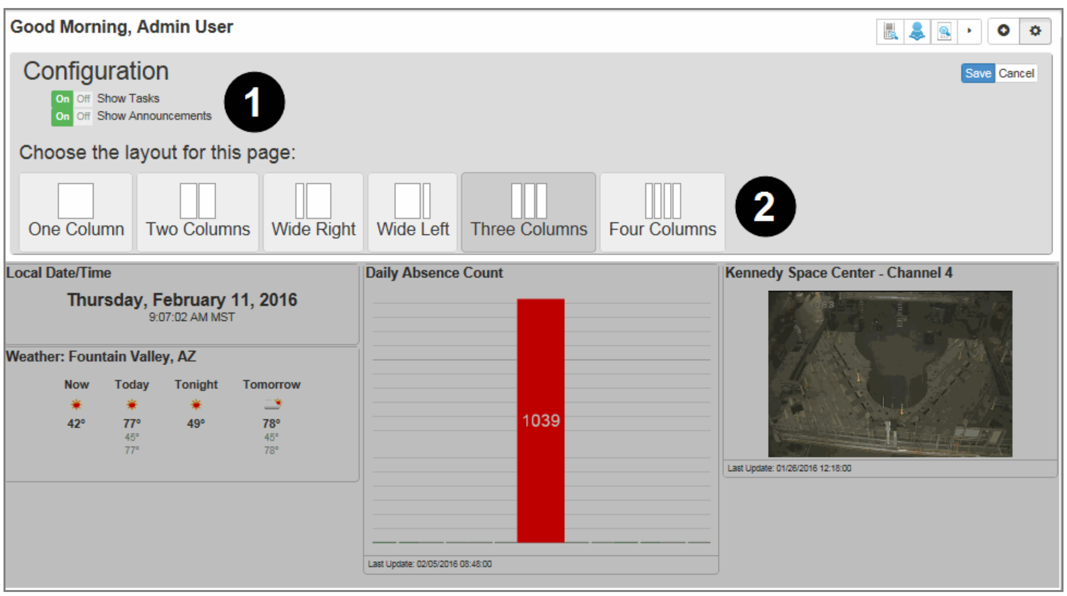


Chooser Screen

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

Managing Widgets on the Home Screen

Screen Layout

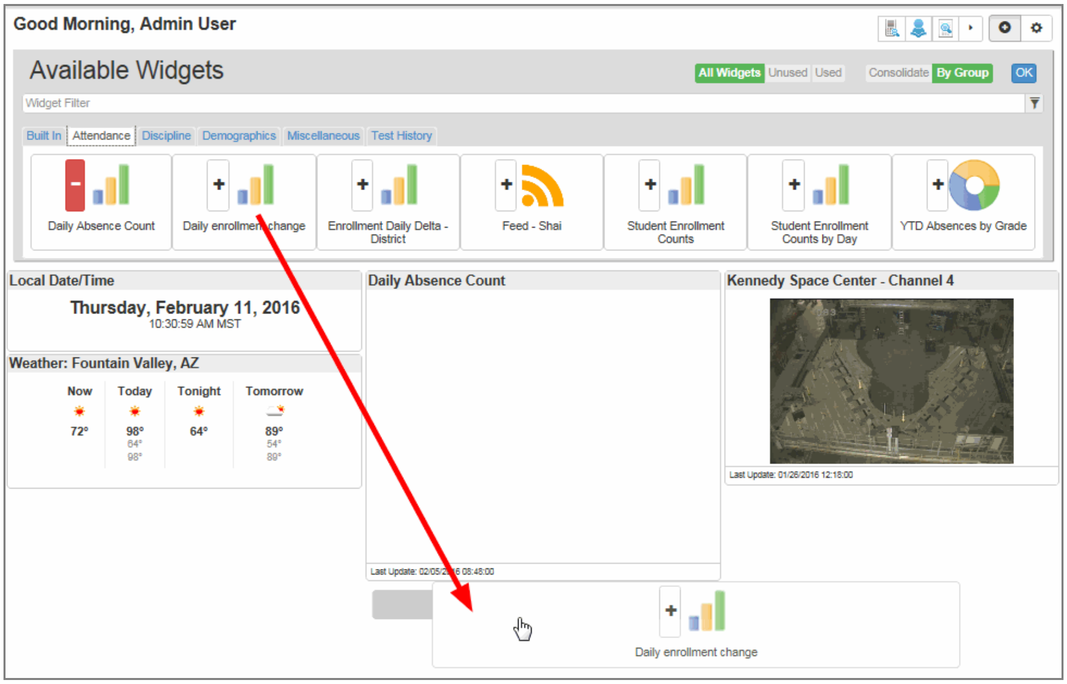


Dashboard Configuration Screen

1. Click . The Configuration screen displays.
2. 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
3. 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**.



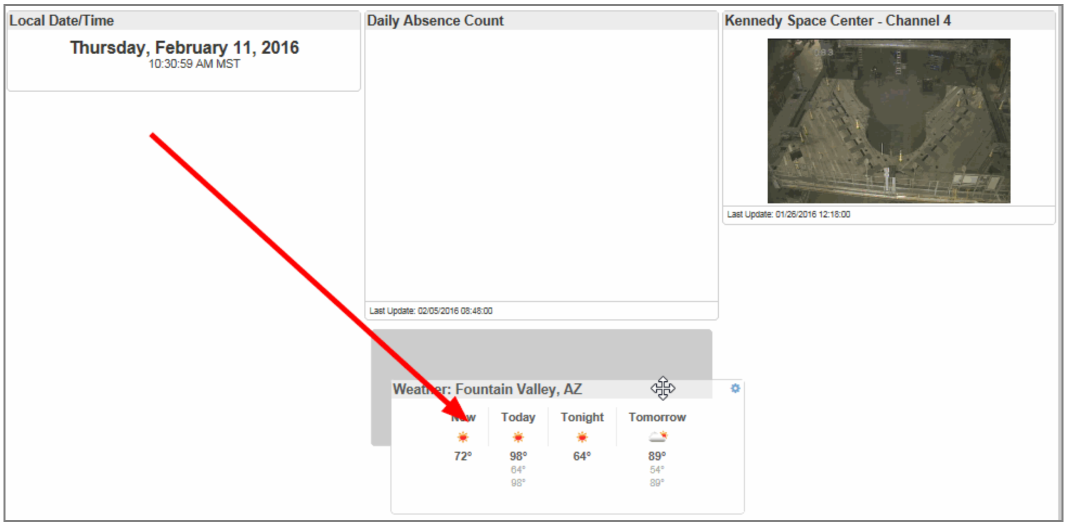
Home Screen, Widget Dashboard

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**.

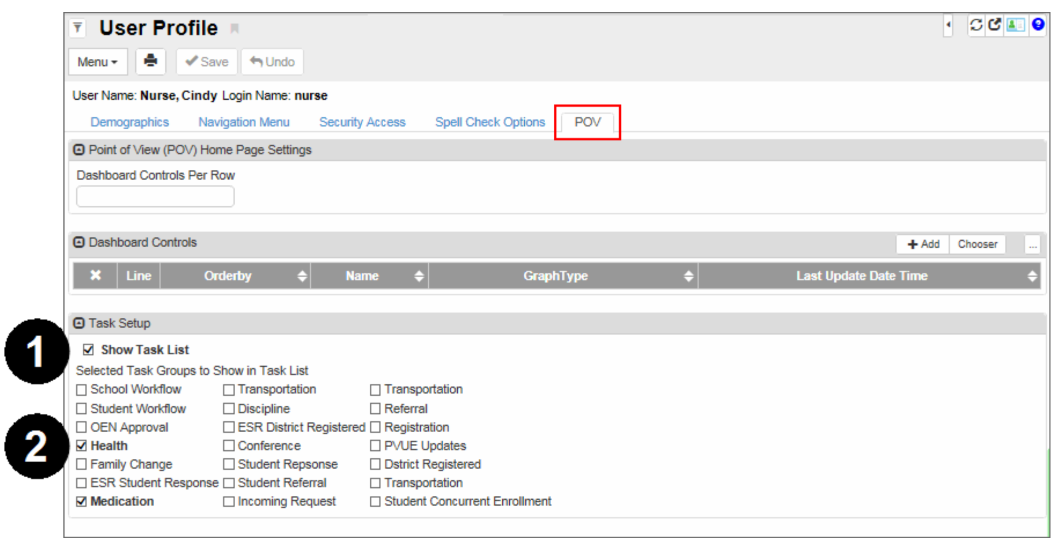


Home Screen, Widget Dashboard

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. ➊
4. Select the desired tasks to display using the checkboxes. ➋
5. Click **Save**.

Chapter 3: Managing Students

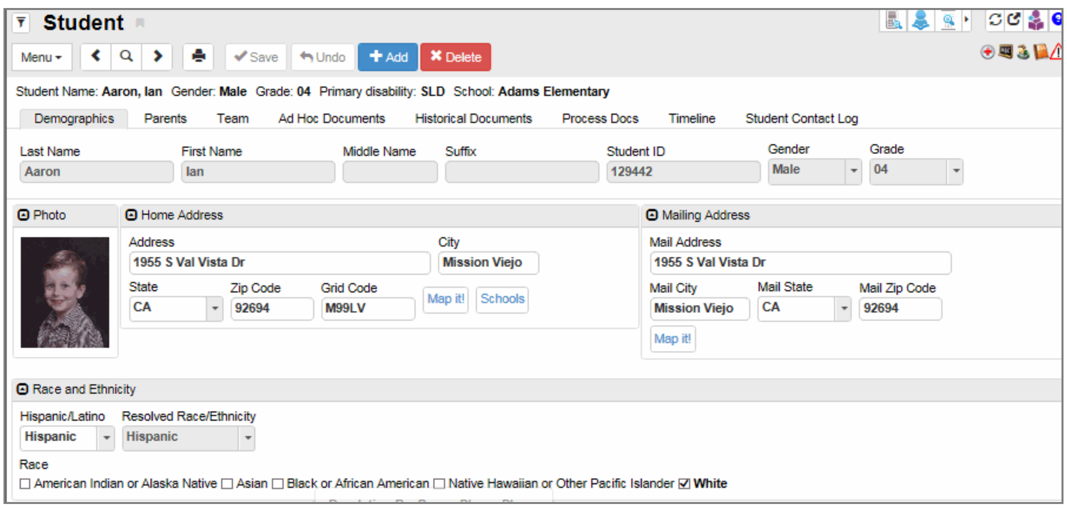
Overview

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**



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.

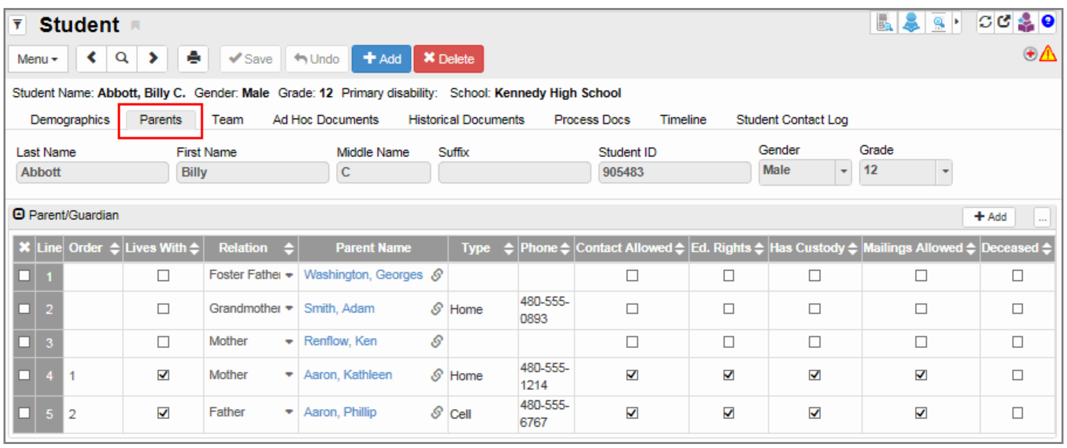
Some of the information is imported into the special education documents. These fields include:

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

Parents Tab

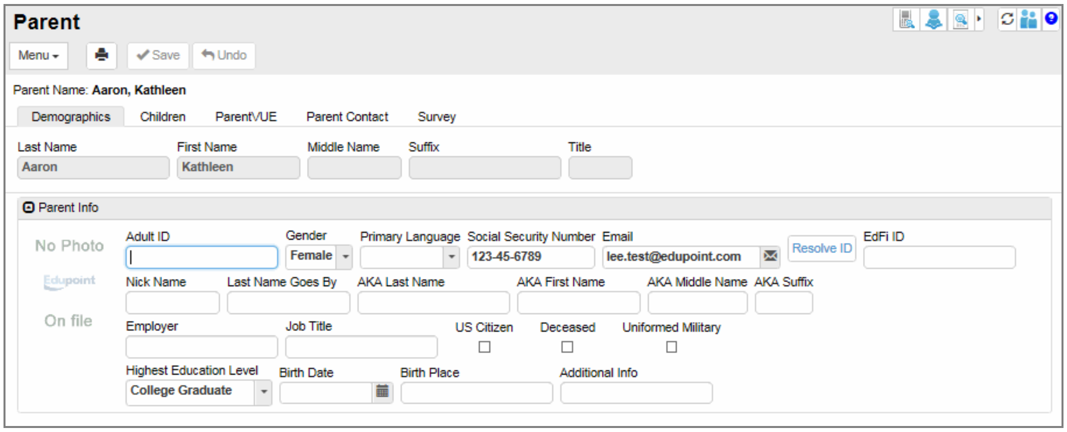
The **Parents** tab contains a grid that lists:

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



Student Screen, Parents Tab

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

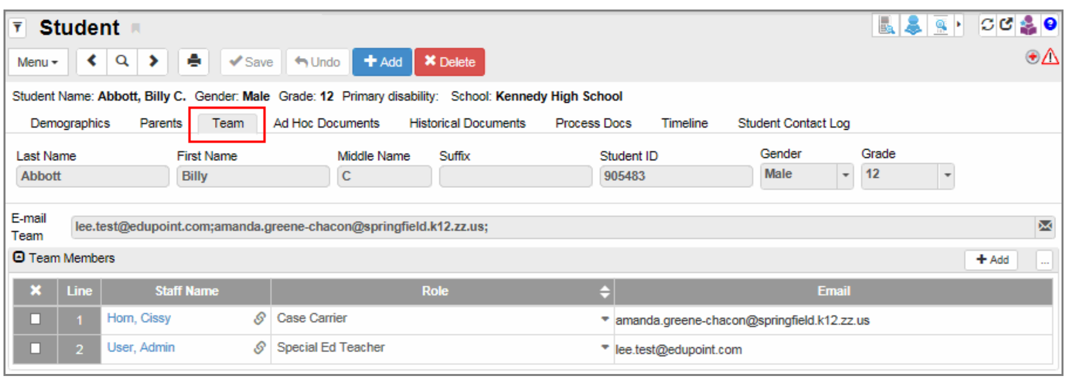


Parent Screen

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.

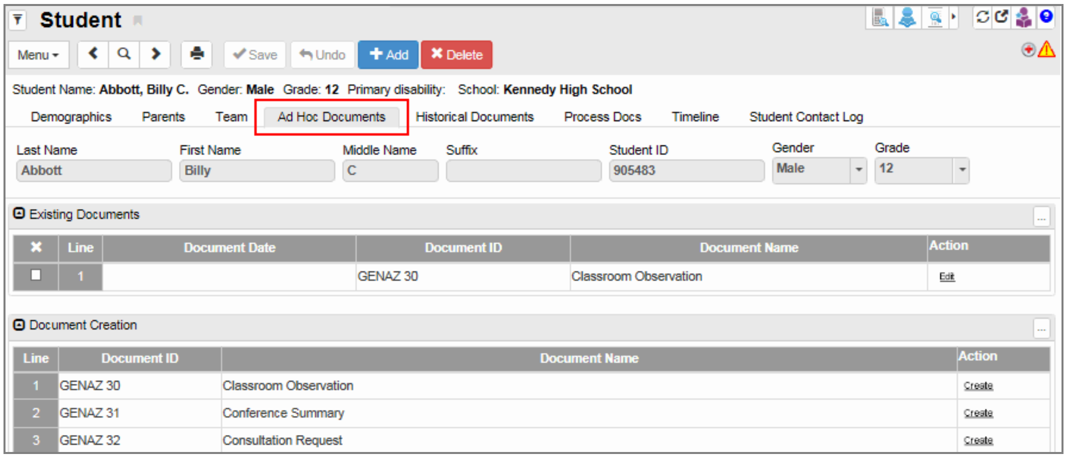


Student Screen, Team Tab

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.



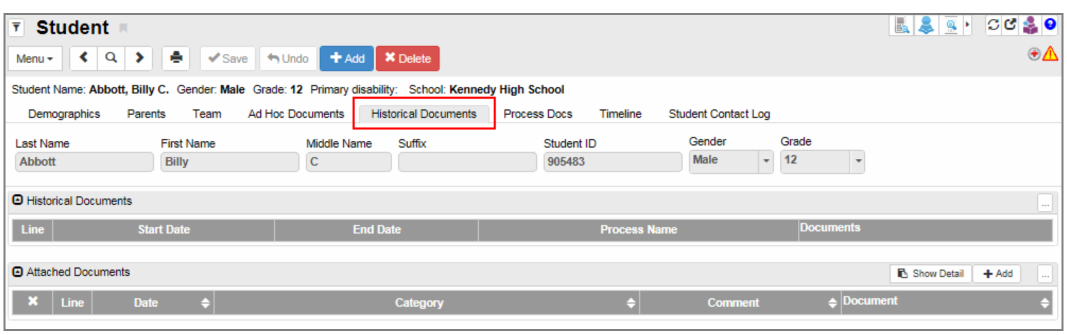
Student Screen, Ad Hoc Documents Tab

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.



Student Screen, Historical Tab

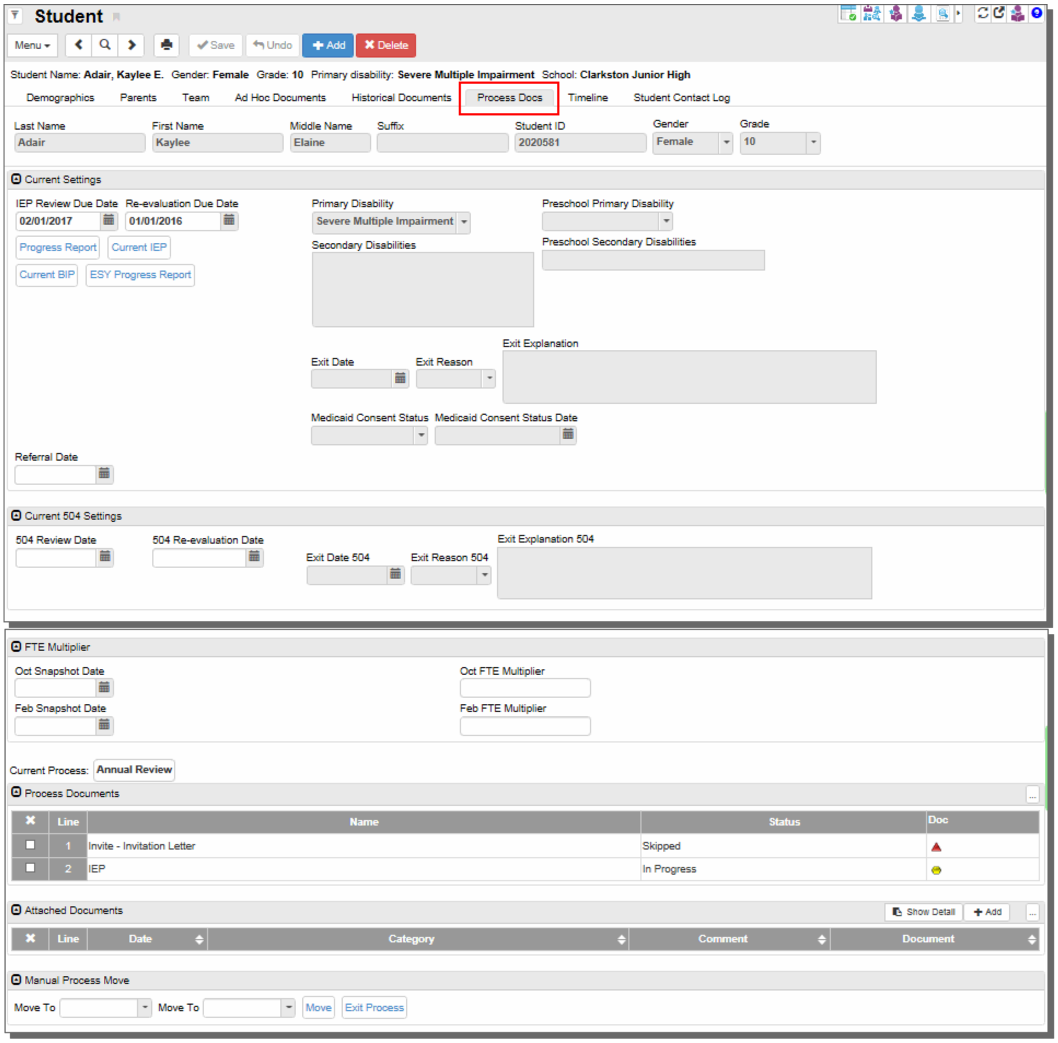
Process Docs Tab

> 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.



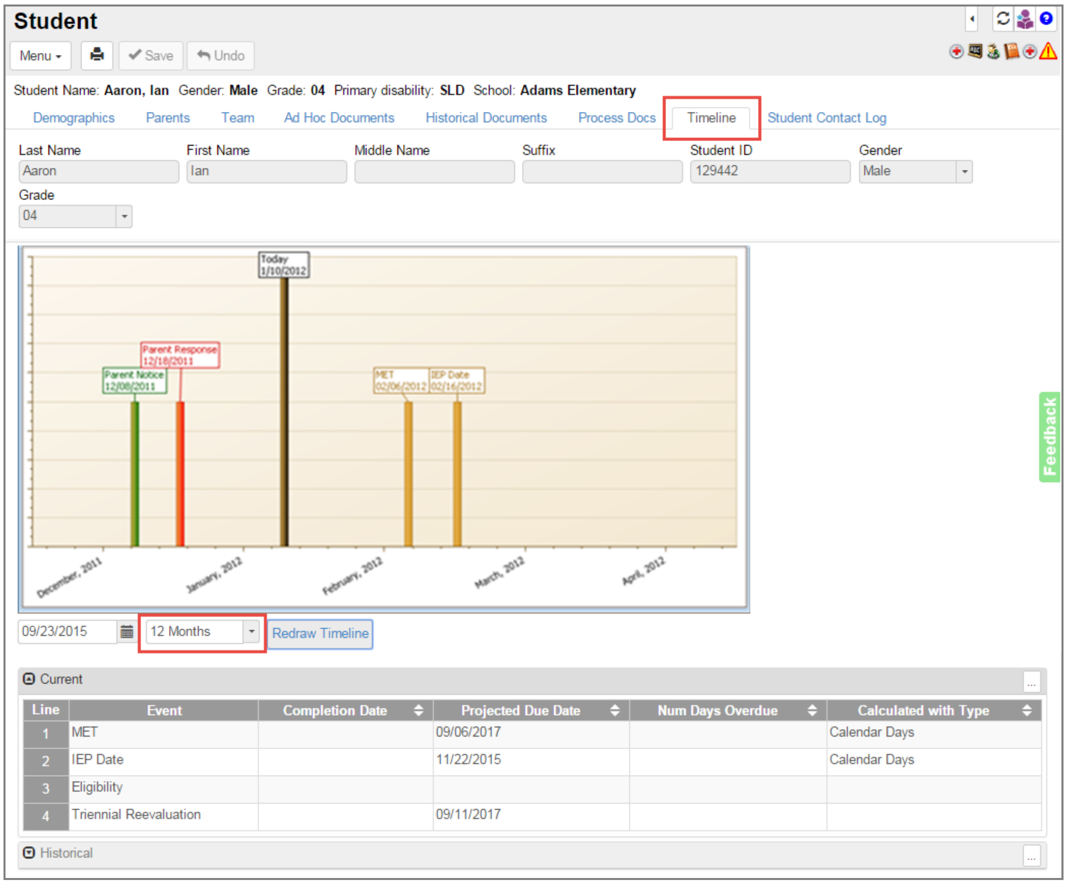
Student Screen, Process Docs Tab

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.

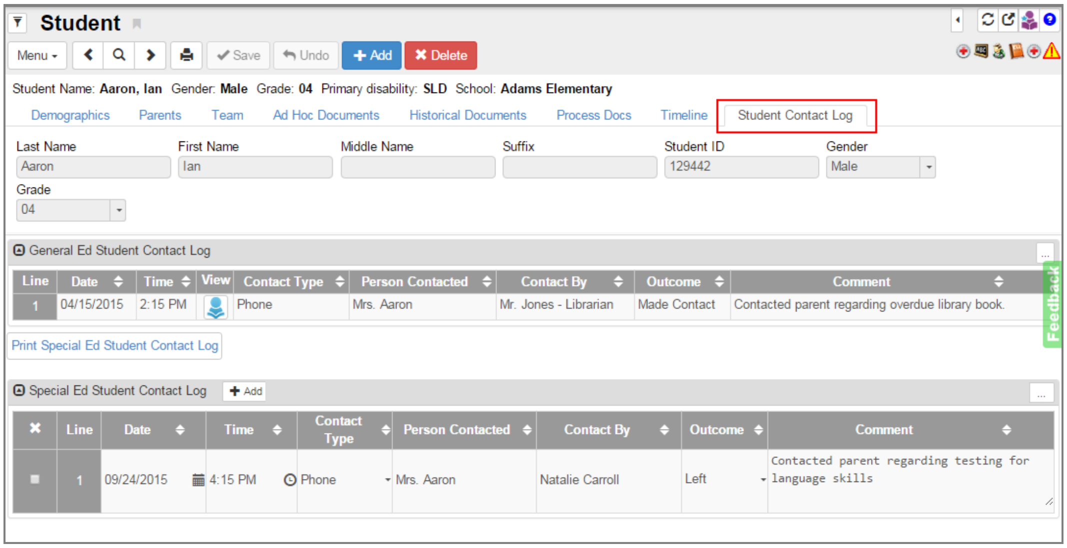


Student Screen, Timeline Tab

Student Contact Log

The **Student Contact Log** tab documents contact made with parents.

- The General Ed Student Contact Log imports from Synergy SIS and is view only.
- The Special Ed Student Contact Log allows Synergy SE users to add contact records.



Student Screen, Student Contact Log 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

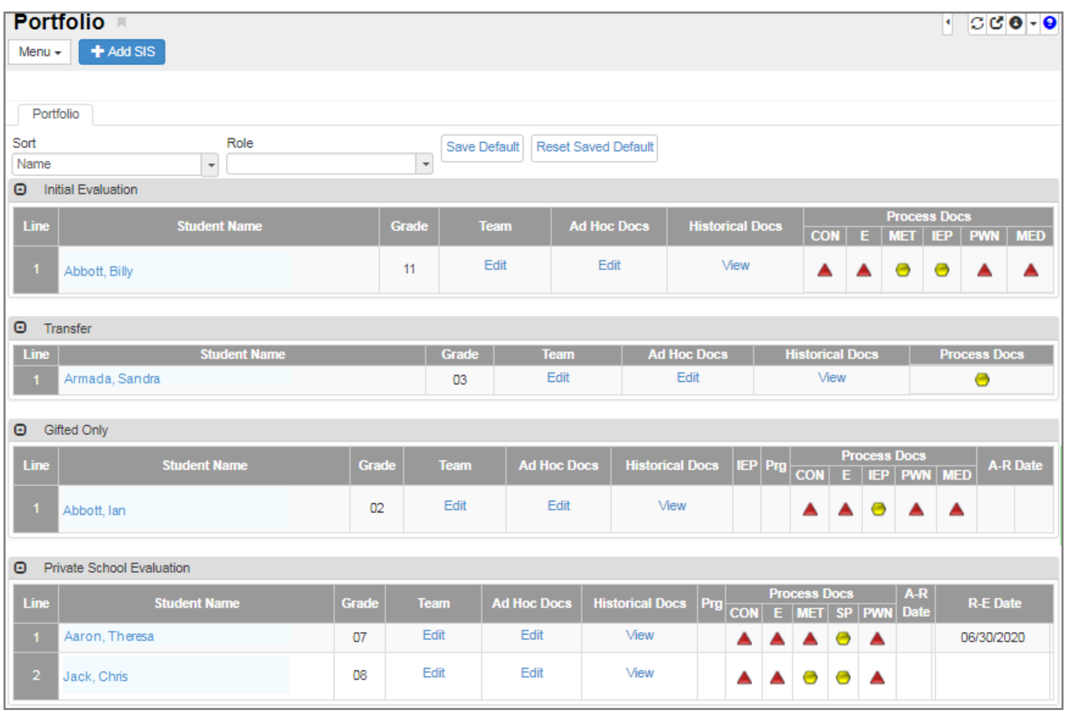
   – In Progress

   – 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.

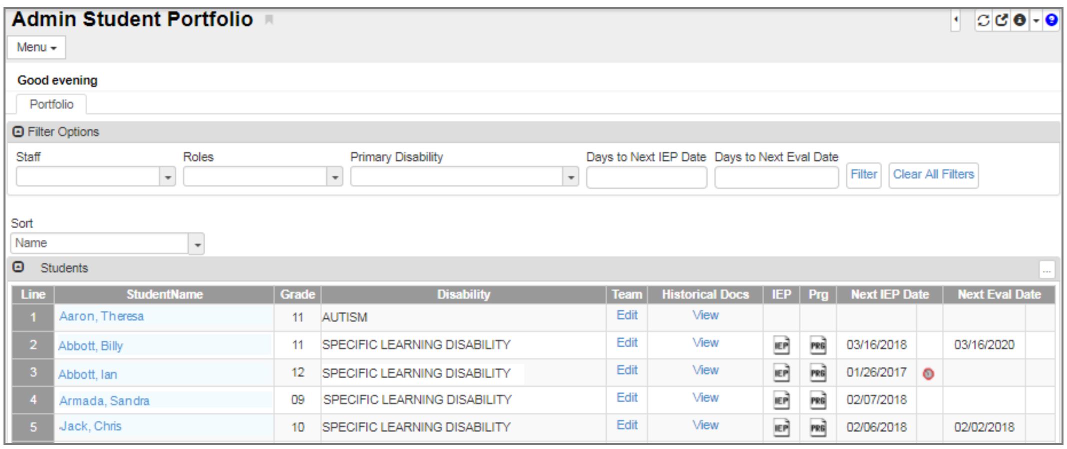
- Access from **Synergy SE > Student > Portfolio**.



Portfolio Screen

Admin Student Portfolio Screen

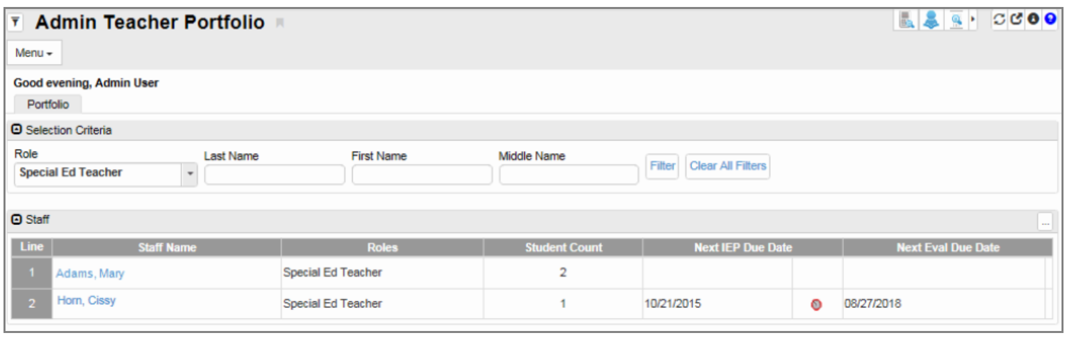
- Provides administrators or case managers the ability to view and manage upcoming events without being added to all student teams.
- Displays all students in special education for the current focus. This screen may be filtered by **Staff**, **Roles**, **Primary Disability**, **Days to Next IEP Date**, 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 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**.



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.

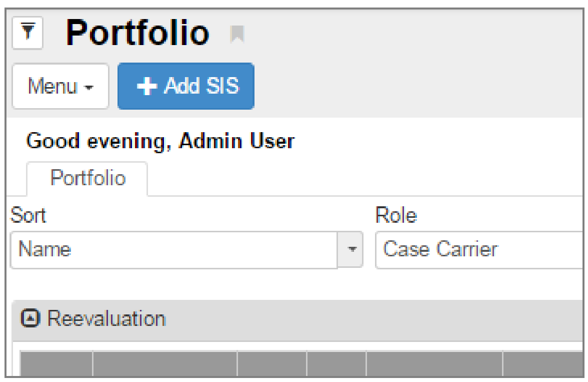
To import a student and their demographic information to Synergy SE from Synergy SIS:

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**.

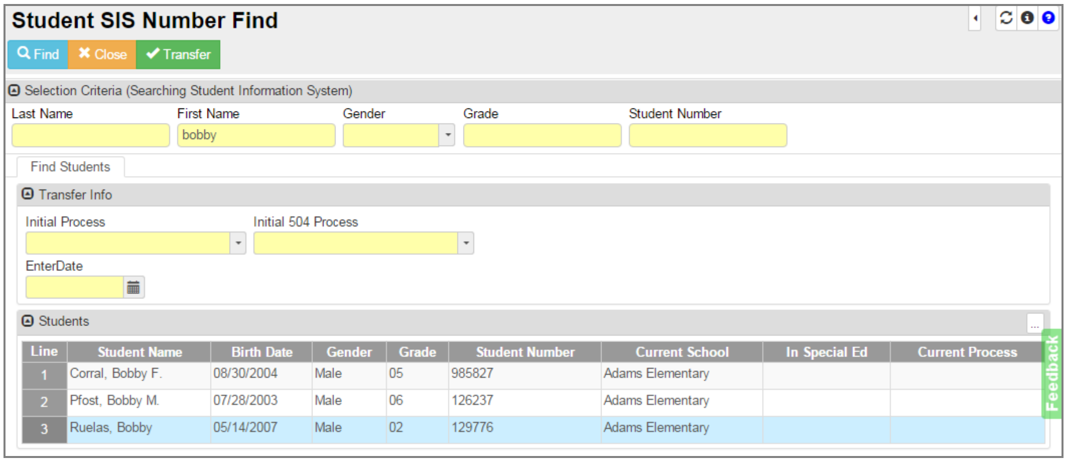


Portfolio Screen

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 Screen

5. Click **OK**.

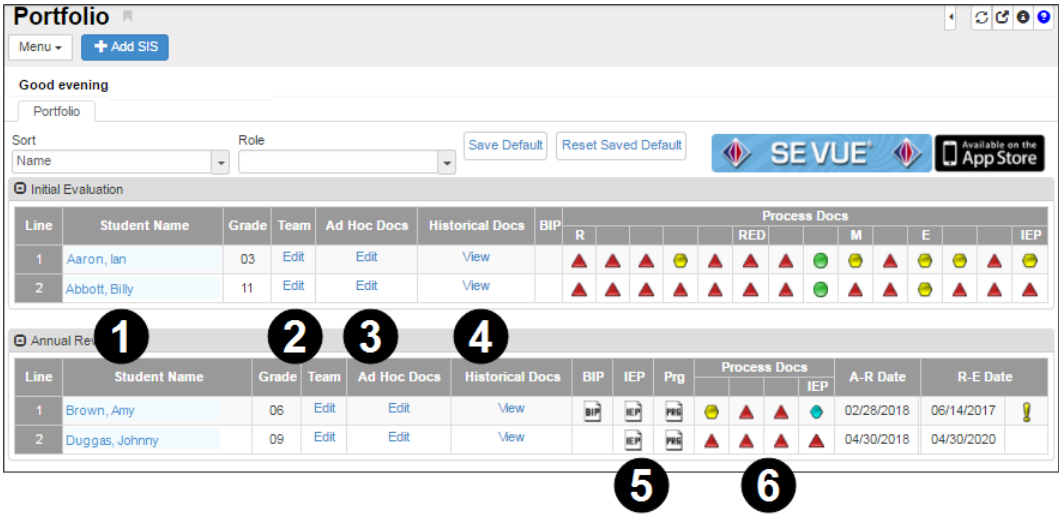
Adding a Current Synergy SE Student to Your Portfolio

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.

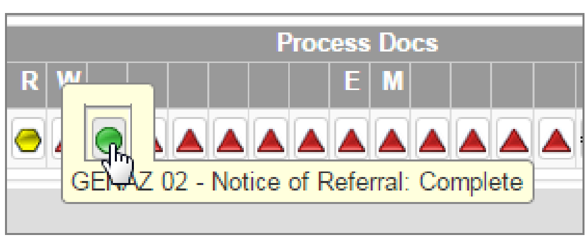
If the student cannot be located, contact the Synergy SE Help Desk for assistance.

Accessing and Editing Student Data and Information



Portfolio Screen

- Select the student's name to view/edit demographic data. ❶
- Click **Edit** in the Team column to add or remove team members. ❷
  - 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. ❸
- Click **View** to view Historical Documents. ❹
- Click to view the IEP (Individualized Education Program) document. ❺
- Click To view the student's Progress Report. ❺
- Process Documents: ❻
  - 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.

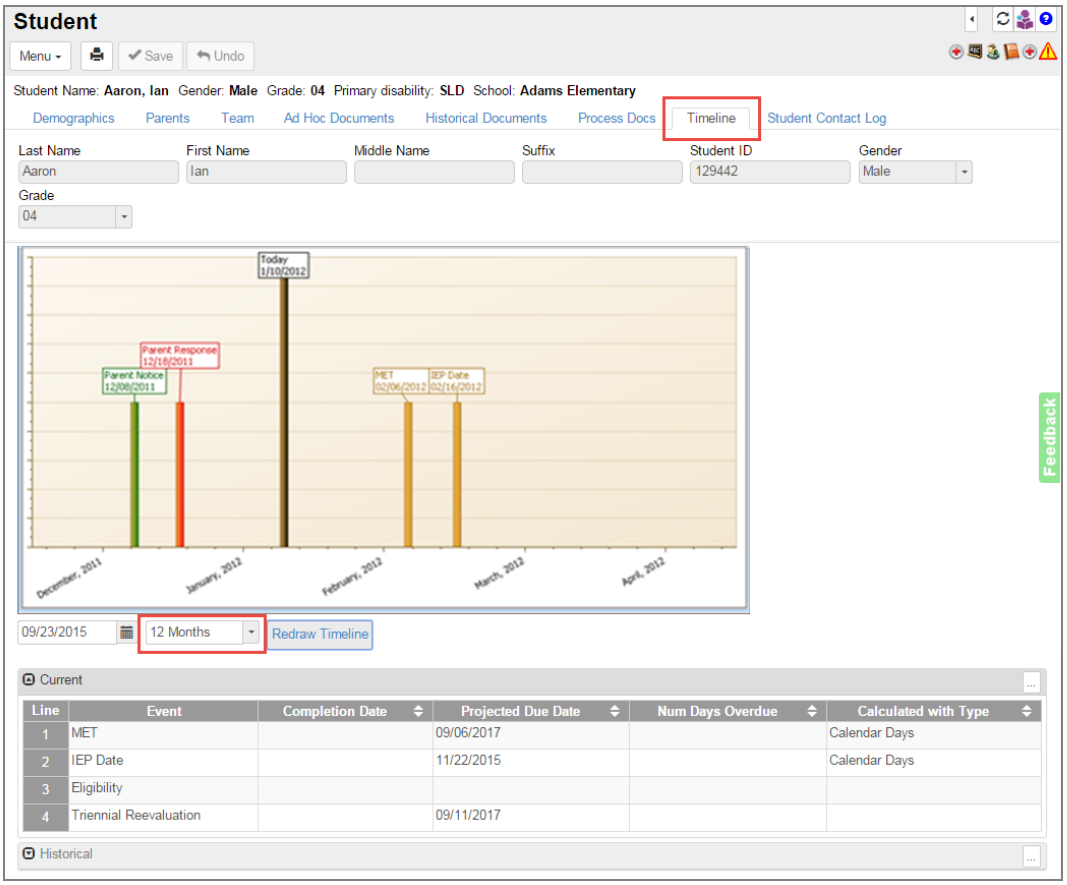
  displays to indicate the **Next IEP Date** or **Next Eval Date** is overdue.

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.

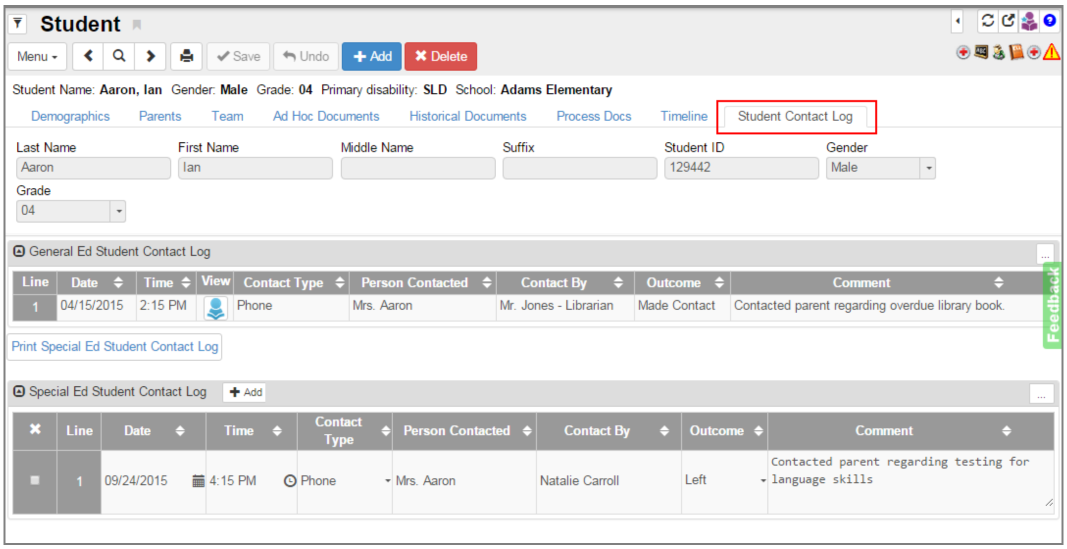


Student Screen, Timeline Tab

Student Contact Log

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

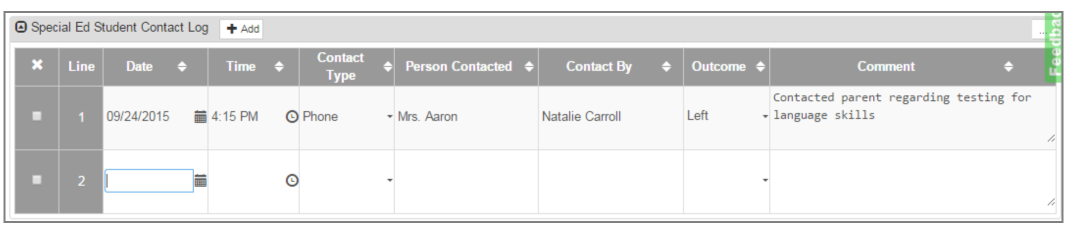
- The General Ed Student Contact Log grid which contains entries from Synergy SIS is view only.
- Team members can record entries in the Special Ed Student Contact Log grid that is not visible in Synergy SIS.



Student Screen, Student Contact Log Tab

To create a log entry:

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

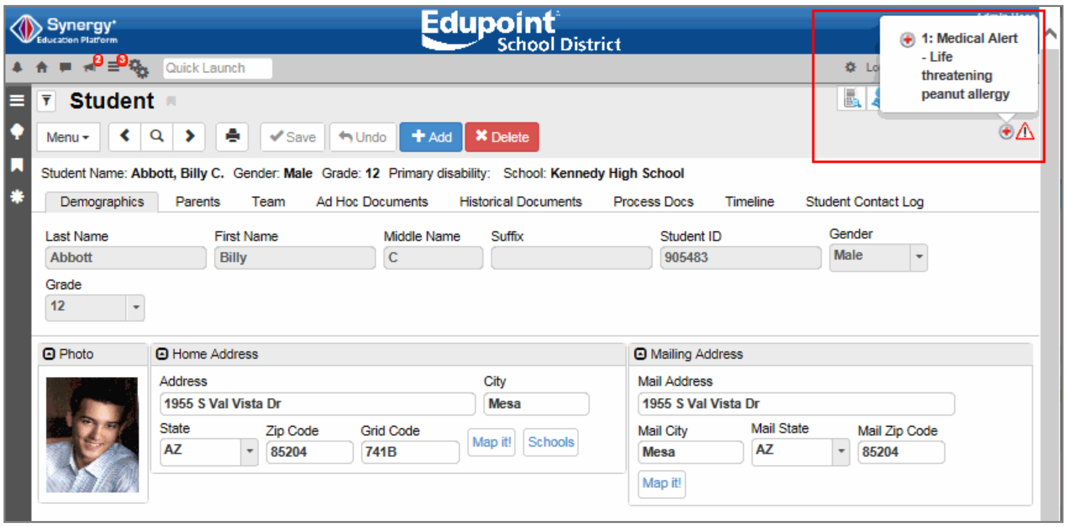


Student Screen, Student Contact Log Tab

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.

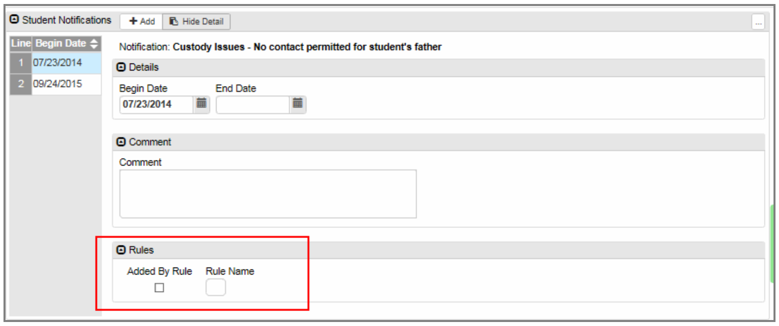


Student Screen

- 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.



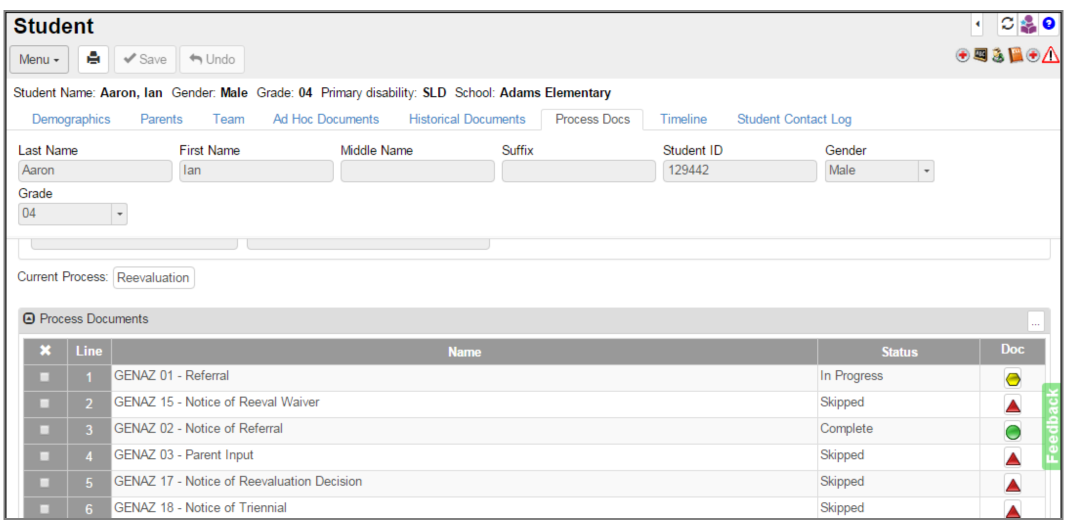
Student Notification Screen, Detail

Manually Moving a Student to Another Process

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

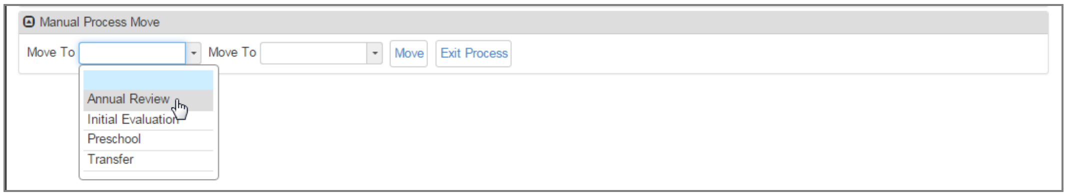
1. Select a student on the Portfolio screen.
2. Select the **Process Docs** tab.
3. Finalize or delete any in-process documents.

In-process documents are indicated by .



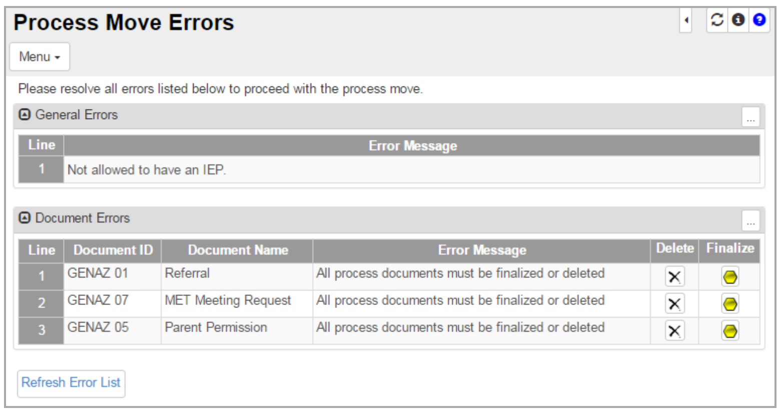
Student Screen

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



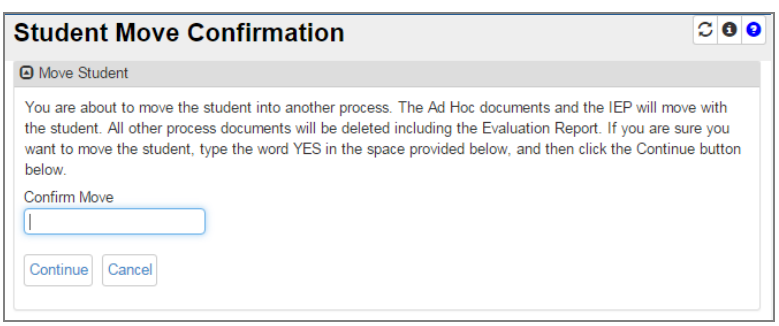
Student Screen

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.



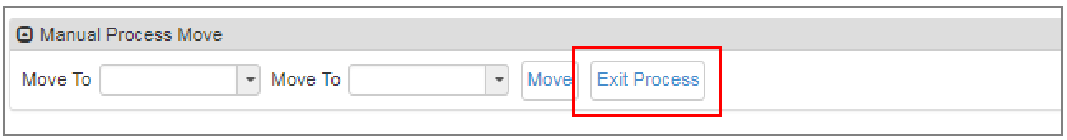
Student Move Confirmation

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.

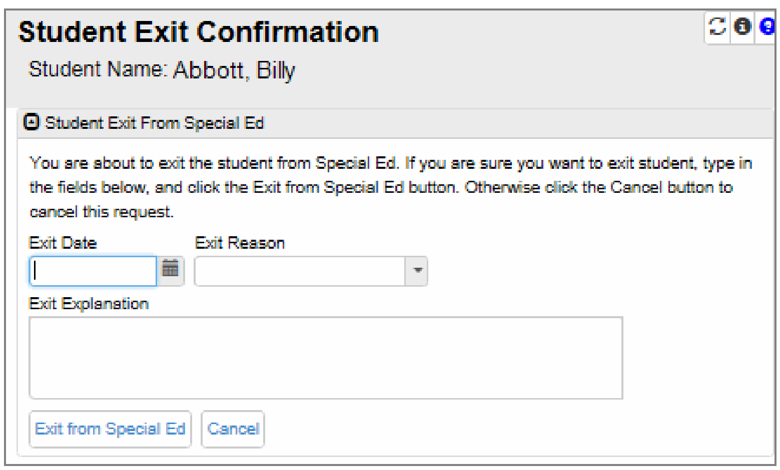
No draft documents indicated by are allowed when exiting a student from Special Education.

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.

Team Student Team List

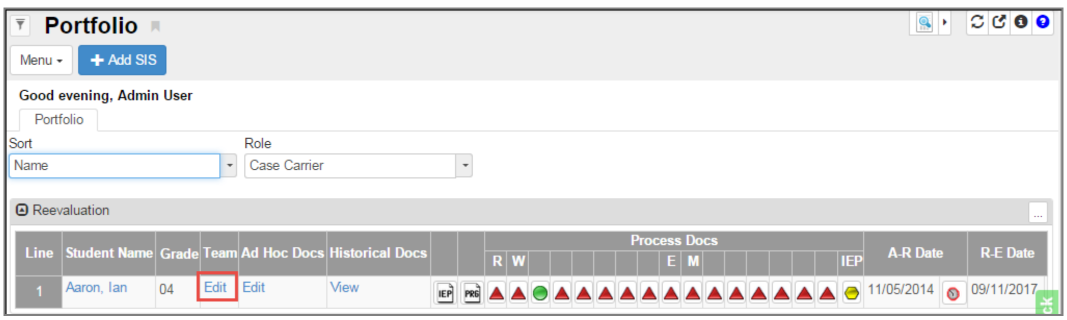
The person that adds a student to Synergy SE is assigned as the Case Manager in that student's Team.

> You cannot delete the initial Case Manager assigned to a student until you add a new Case Manager.
>
> Each student MUST always have one assigned Case Manager.

Adding a Team Member

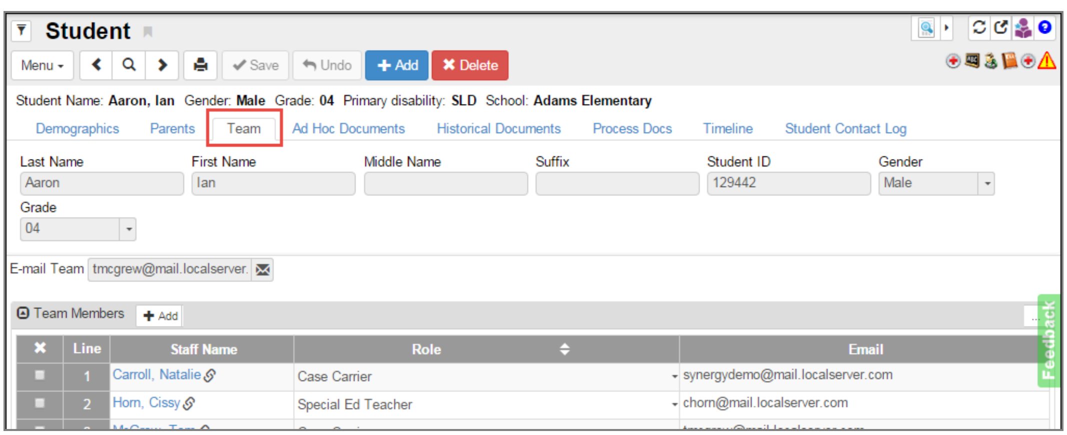
Add a Team Member to a student from the Portfolio or Student views:

1. Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
   - Click **Edit** in the Team column of the student from the Portfolio screen.



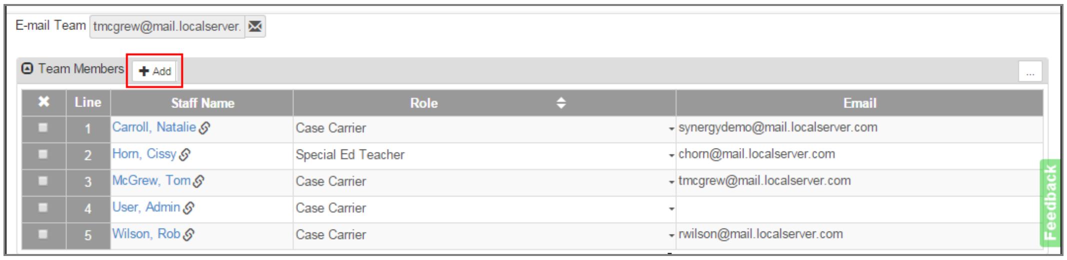
Portfolio Screen

   - Select the **Team** tab from the Student screen.



Student Screen, Team Tab

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



Student Screen, Team Tab

3. Find and select the staff member.

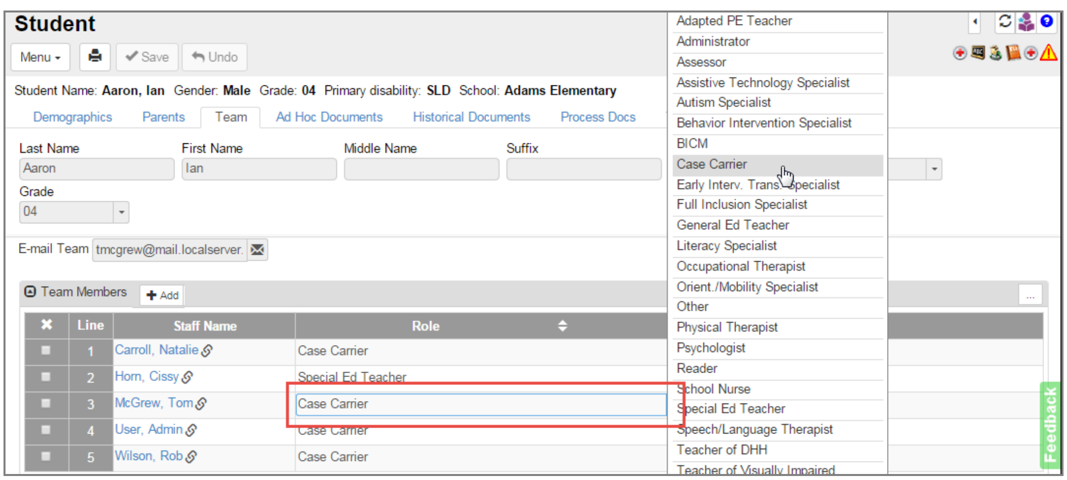
> Enter minimal criteria when doing a search. For example, enter the last name and their first name initial.

4. 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.

1. Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
2. (Optional) Add the new Team member to the Team.
3. Select the team member's **Role**.



Student Screen, Team Tab

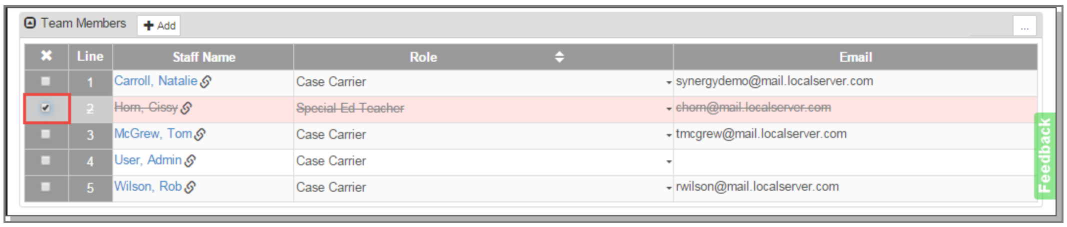
4. Click **Save**.

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.



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.

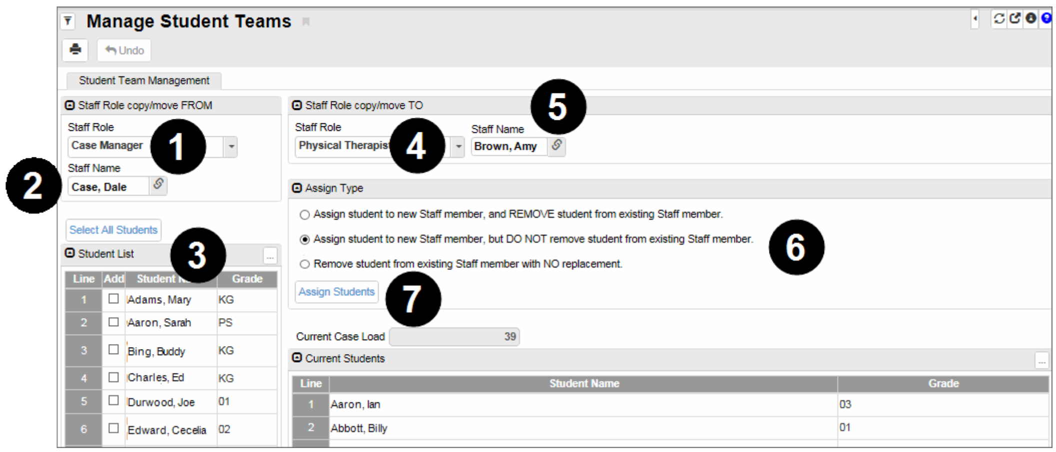
> Two roles for each Special Ed staff member is recommended: Case Manager and their normal role such as Special Ed Teacher or Speech Pathologist. See the *Staff Setup* topic in the *Synergy SE Administrator Guide* for more information.

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.



Manage Student Teams Screen

2. Select the staff and students to **copy/move FROM**:
   a. Select a **Staff Role**. ❶
   b. Click to select a **Staff Name**. ❷
   c. Select the students from the **Student List** to be moved or click **Select All Students**. ❸
3. Select the staff and students to **copy/move TO**:
   a. Select a **Staff Role**. ❹
   b. Click to select a **Staff Name**. ❺
   c. Select the type of transfer: ❻
      - 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**.

4. Click **Assign Students**. ❼ The students move under Current Case Load.

Special Ed Calendar

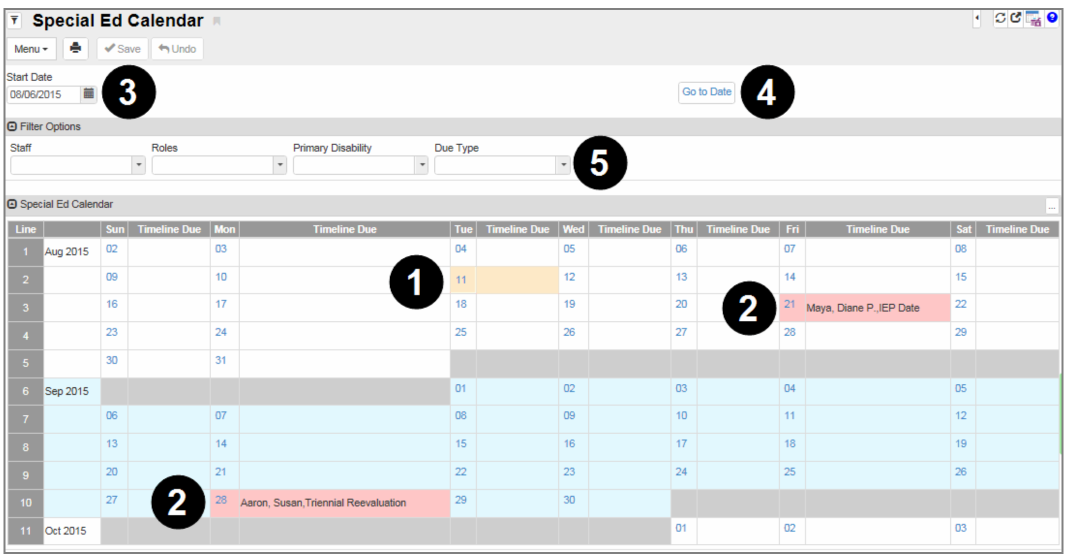
The Special Ed Calendar screen displays information from School Calendar and student timeline events.

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 if focused to a school and belongs to student teams, then only the students belonging 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 ❶ and any scheduled reviews ❷ highlighted.



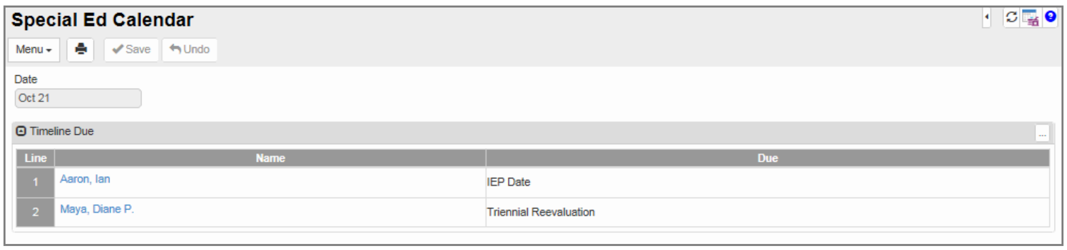
Special Ed Calendar Screen

- To display a different date:
  1. Select a **Start Date** ❸ using the calendar icon to display different dates.
  2. Click **Go to Date** ❹ to display the selected dates in the calendar.

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

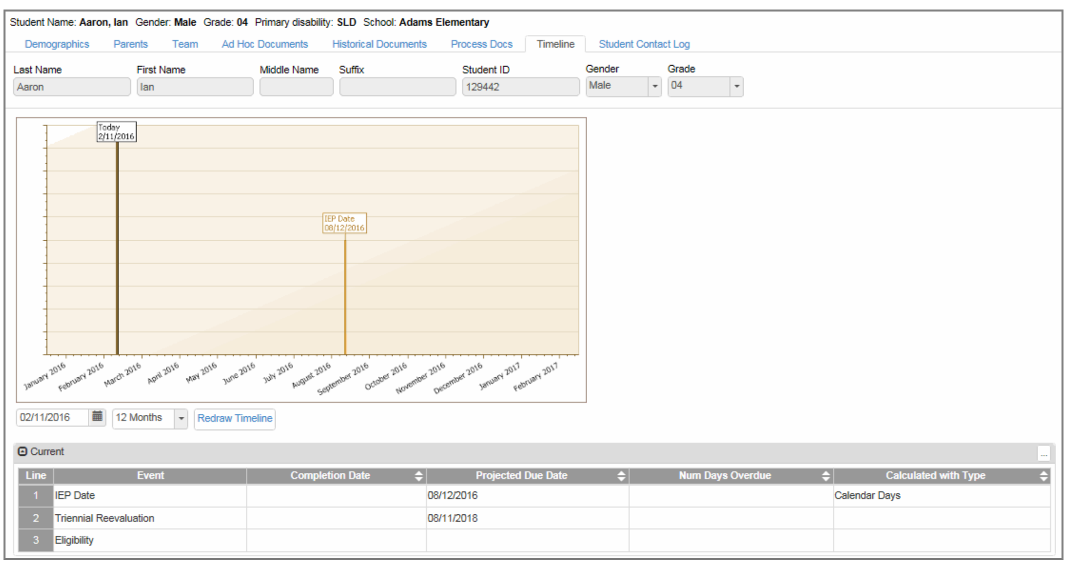
> The filters available in the drop-down are based on the calendar dates shown. The filters are additive. Selecting more than one, filters by all the criteria selected.

  - **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:
  1. Select a day link 21. The screen displays the Timelines Due on that day.



Special Ed Calendar Screen

  2. 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.

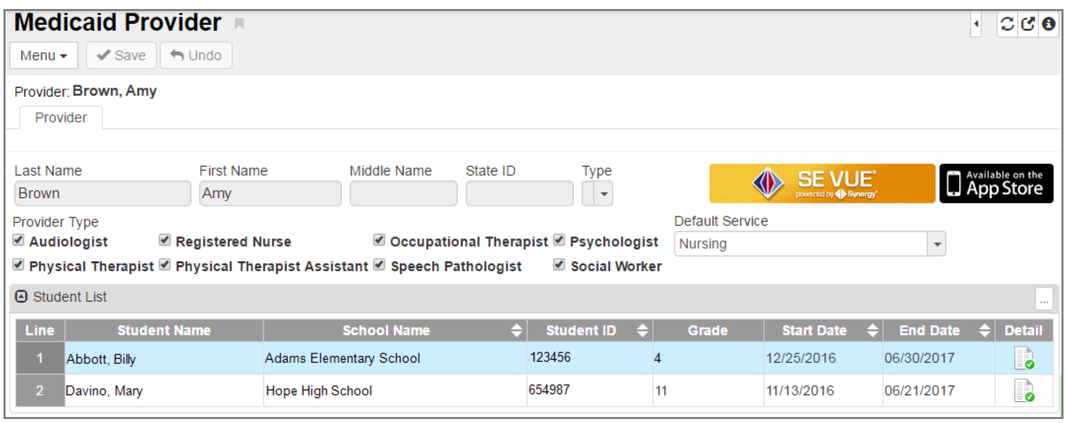
Assigning Medicaid Services to Students

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**.

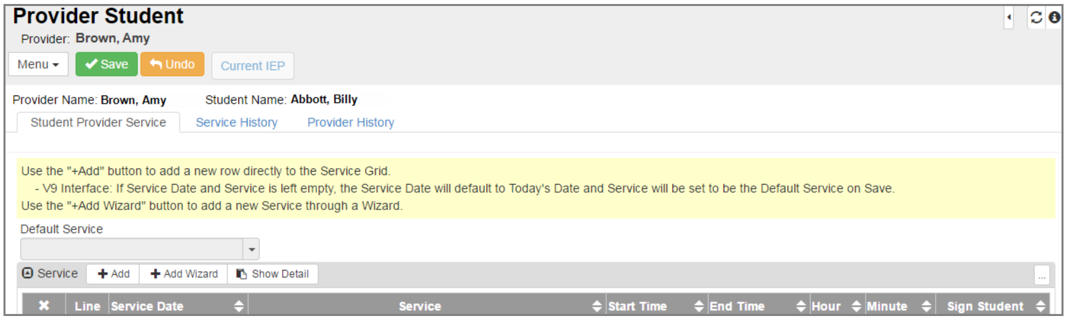


Medicaid Provider Screen

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.

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



Provider Student Screen

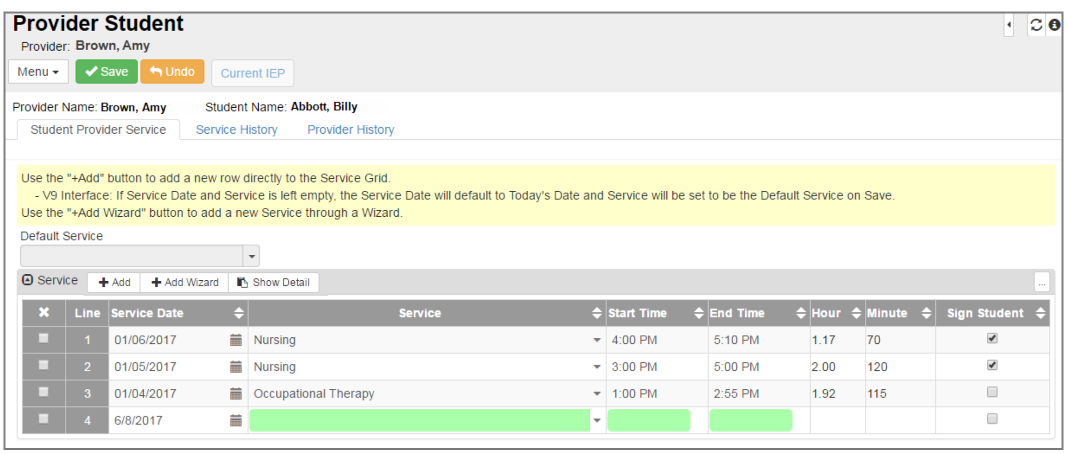
4. Add a service.

Using Add

1. Click **Add** in the Service grid. A new row displays in the Service grid.
2. 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.

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



Provider Student Screen

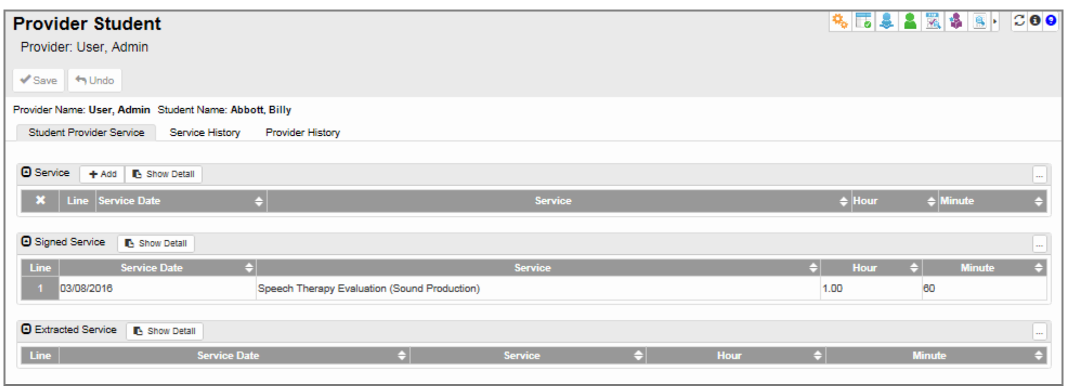
> - Click **Current IEP** to view the student's IEP in PDF format.
> - Click **Show Detail** to add notes and make edits to the record.

Using Add Wizard

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

Add Student Service Screen

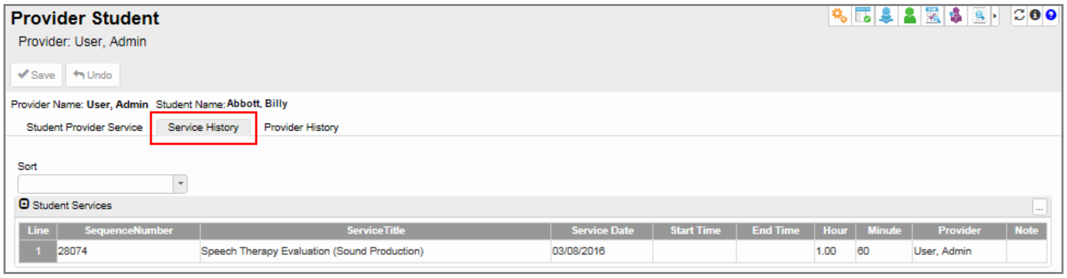
2. Select the **Service**.
3. Select a **Service Date**.
4. Enter a **Start Time** and **End Time**.
5. (Optional) Select a **Service Status**.
6. (Optional) Enter a **Note**.
7. Select the **Sign Student** option when the service is completed and may be billed.
8. Click **Save**. The service displays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



Provider Student Screen, Student Provider Service Tab

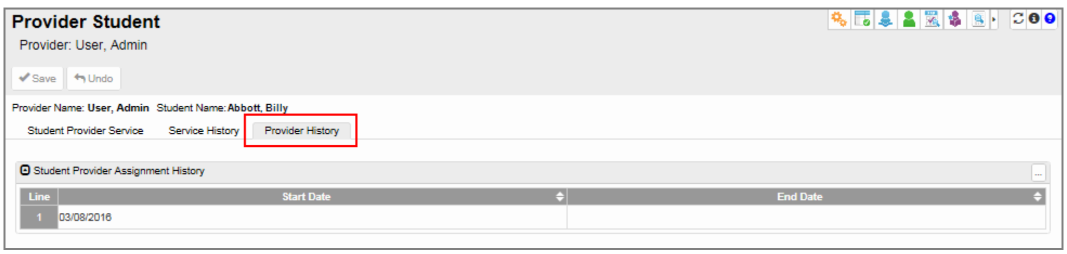
Service and Provider History

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



Provider Student Screen, Service History Tab

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



Provider Student Screen, Provider History Tab

Chapter 4: Synergy SE Processes

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.

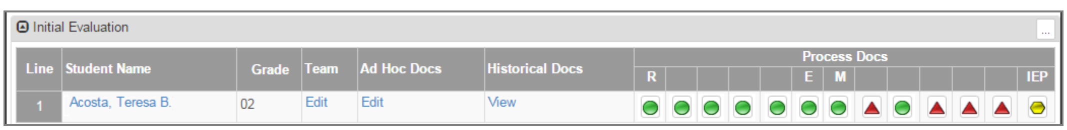
The following scenarios are available within Synergy SE:

- 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 IEP. It is the trigger document for this process. When it is Validated/Finalized, the student moves to the Annual Review process.


Initial Evaluation

Line	Student Name	Grade	Team	Ad Hoc Docs	Historical Docs	Process 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.

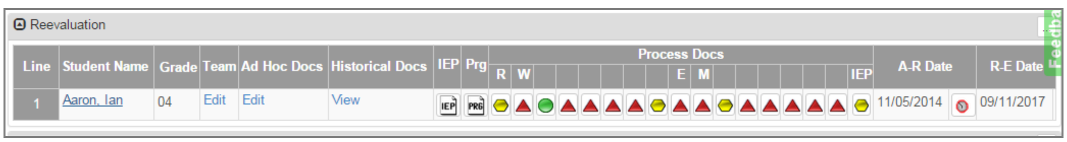
When the time interval is reached, they automatically move to the Reevaluation process to prepare for their triennial evaluation.

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 IEP. 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 PRG and includes the goals that were added to the initial IEP.
- The working copy of the IEP for next evaluation is indicated by IEP and is edited in the student's upcoming Annual Review IEP.
- The Annual Review Date is indicated by A-R Date .
- The Reevaluation Date is indicated by R-E Date.



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.

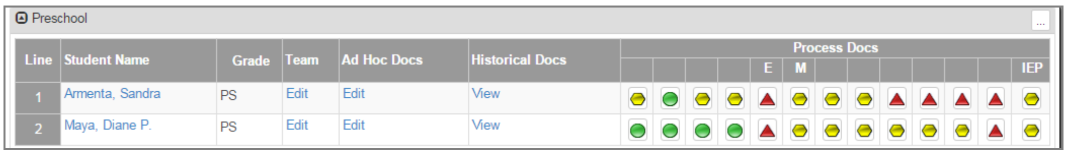
- Finalize the Transfer Meeting Request and Notice of Transfer documents.
- The Transfer IEP is the trigger that moves the student to the appropriate process.

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.

Preschool Process

Preschool Process student's documents are created and finalized as the student moves through the Preschool Process.

- The working copy of the IEP for next is indicated by . It 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.

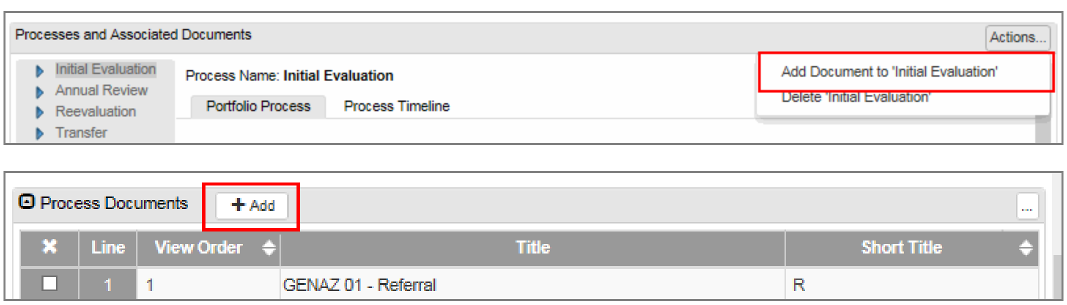


Portfolio Screen

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

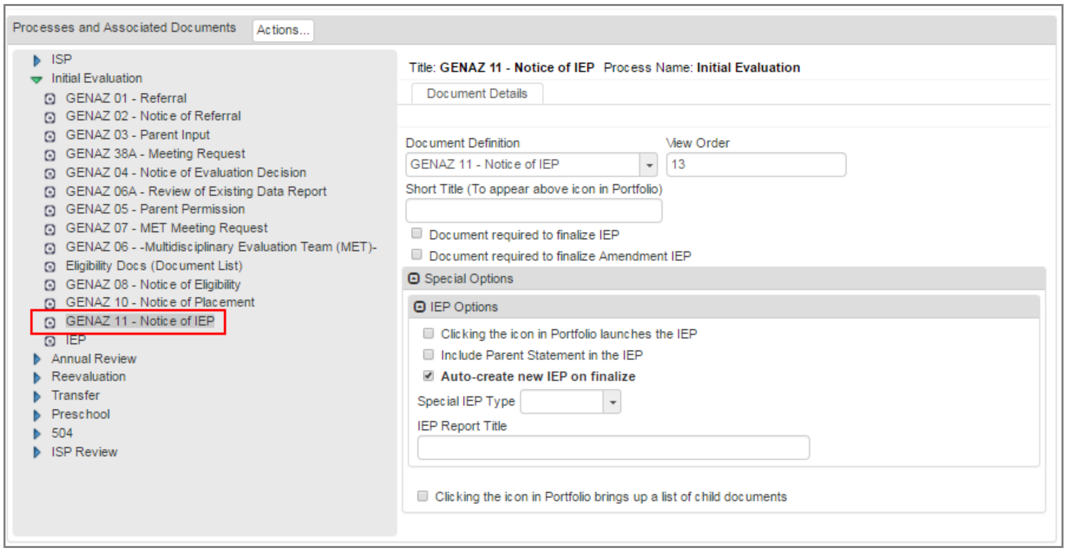
Working with Process Documents

1. Navigate to a process:
   - To add a document, click **Add** in the Process Documents grid or select *Add Documents to ...* from the **Actions** menu. The Process Document screen displays.



Process Definition Screen

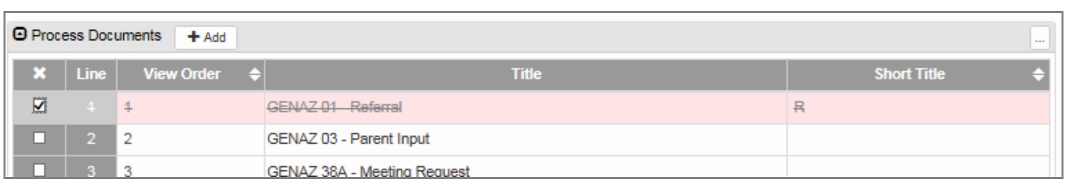
- To edit a document:
  a. Use to locate an existing document in the process.
  b. Select the document. It displays on the right side of the screen.



Process Setup Screen, IEP Processes Tab

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

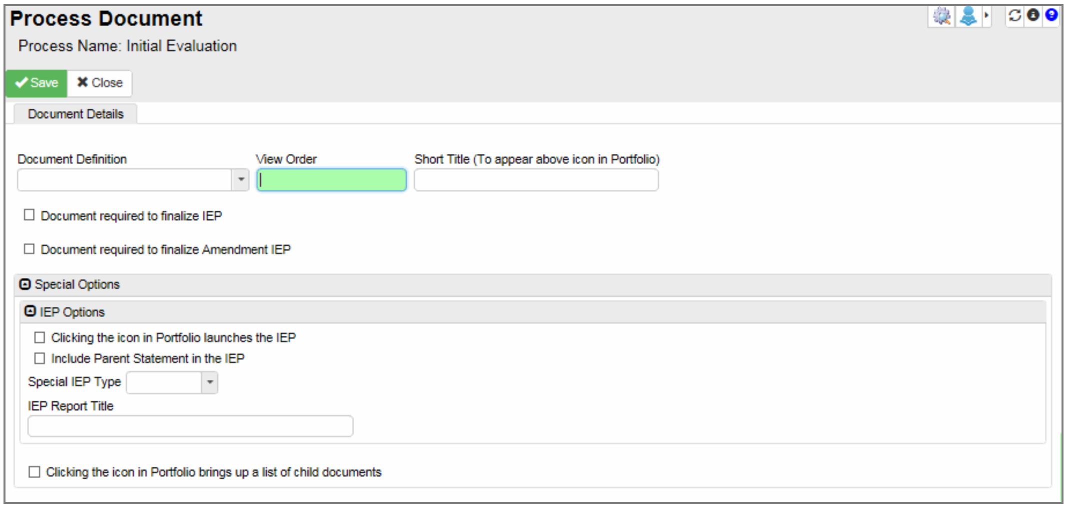
- To delete a document:
  a. Click the box in the **X** column.
  b. Click **Save**.



Process Setup Screen, IEP Processes Tab

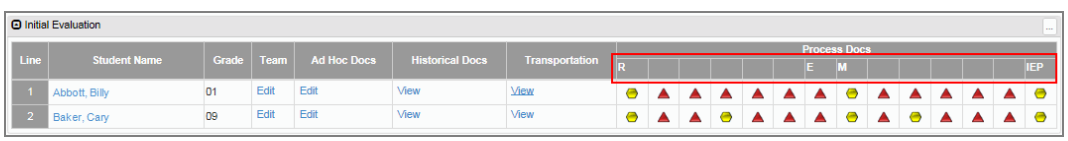
2. Enter or modify the document details.

> 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.

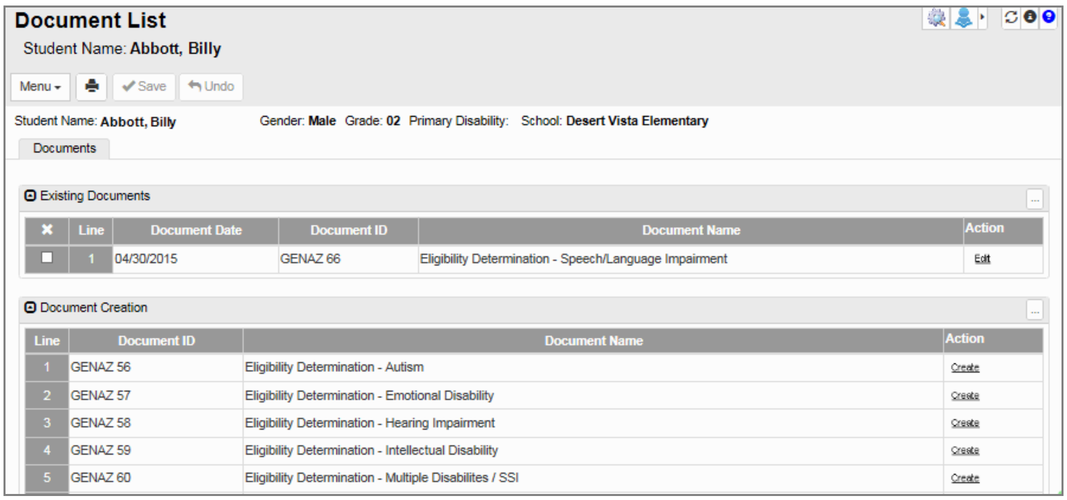


Portfolio Screen

- **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.

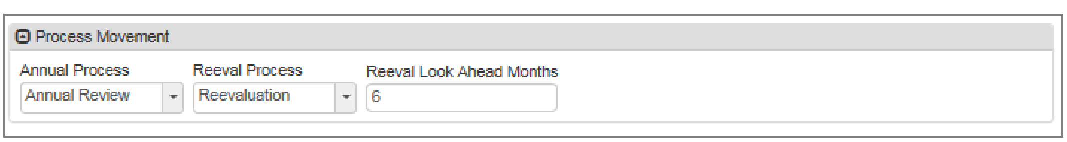
3. (For IEP documents only) Complete the IEP Options and Process Movement sections.
   - IEP Options:
     - **Clicking the icon in Portfolio launches the IEP** – Select to allow the IEP be opened from the Portfolio screen.
     - **Include Parent Statement in the IEP** – Select to include the **Parent 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 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 Document Screen

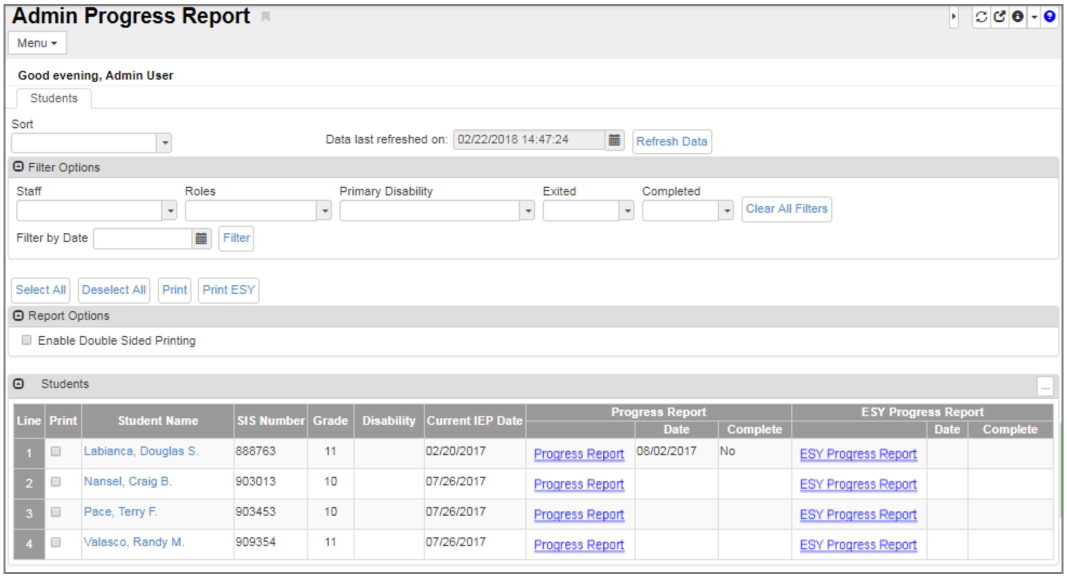
4. Click **Save**.

Chapter 5: Synergy SE Reports

Admin Progress Report

Use to batch print progress reports.

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



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.

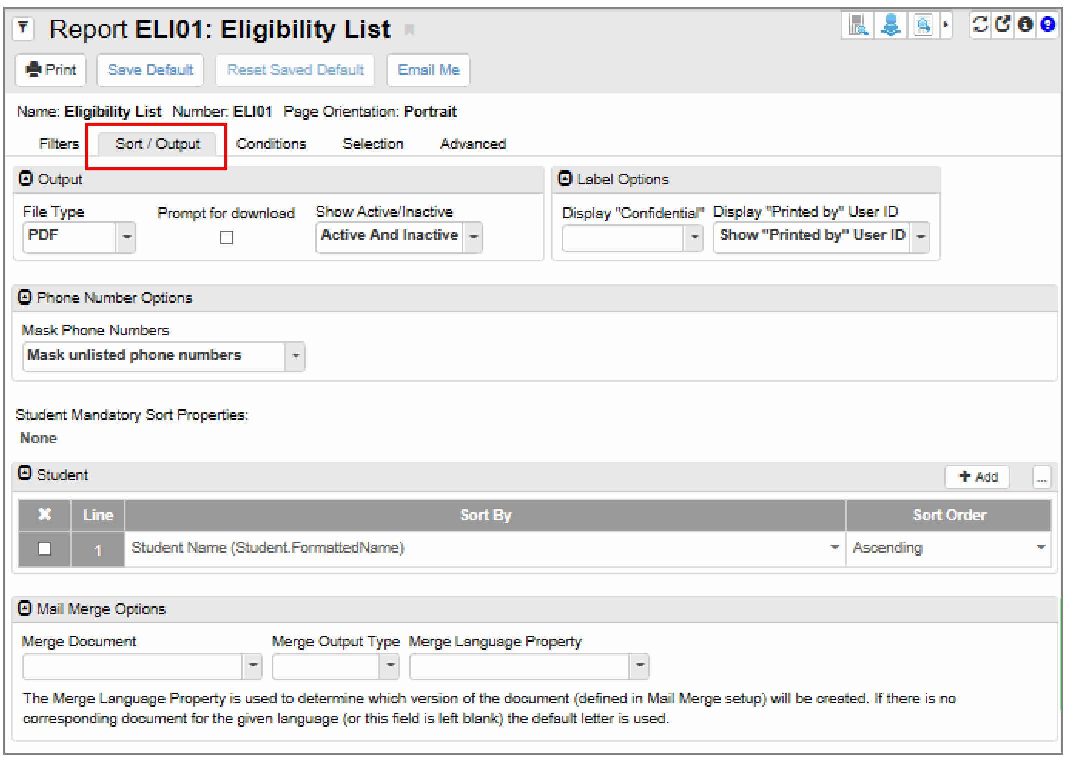
- **Complete** – Shows **Yes** if the goals for the progress period were completed.

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:

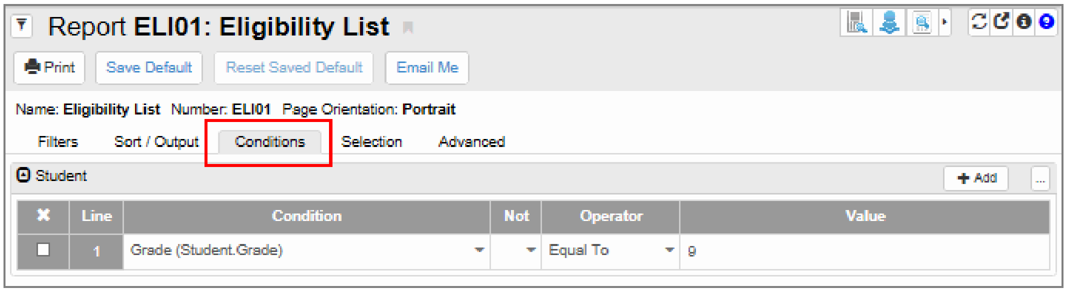
- **Options** – Identifies criteria specific to the report, including dates, codes, and descriptions, which the user may select to filter the results of the desired report.
- **Sort/Output** – Allows for sorting the report results and providing options for the file output type.
  - **Prompt for download** – 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.



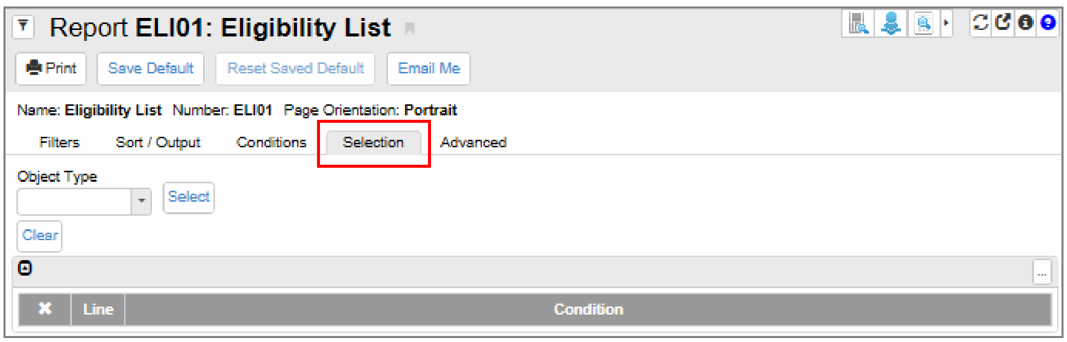
Reports Screen, Sort/Output Tab

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



Reports Screen, Conditions Tab

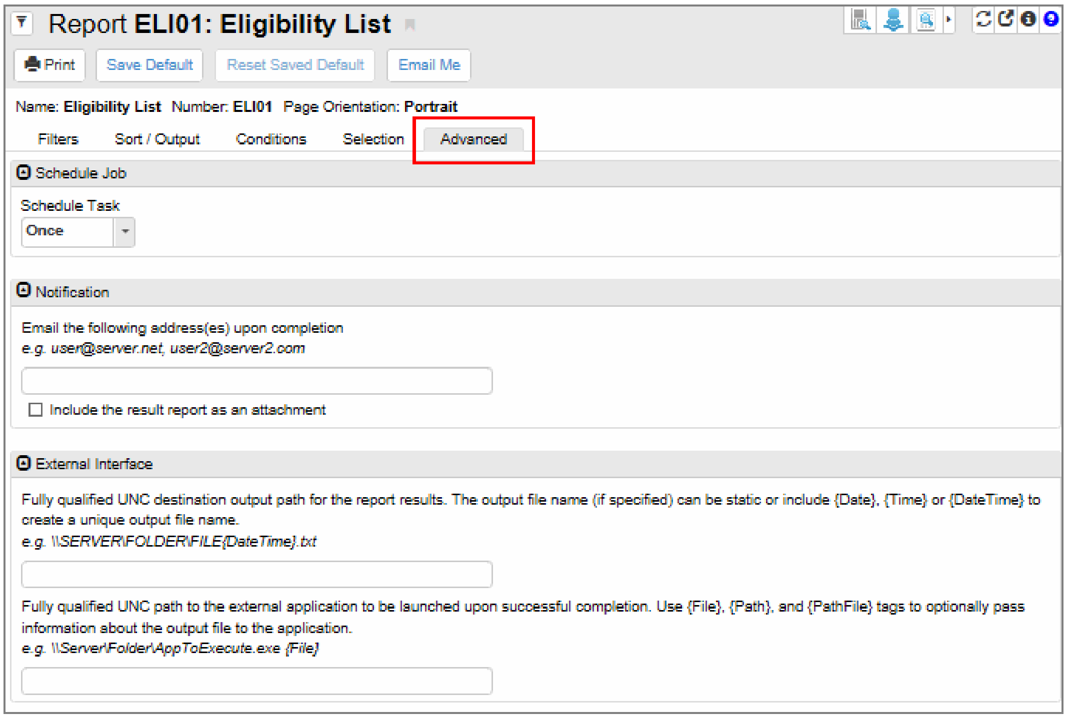
- **Selection** – Provides the user the ability to filter the report to include a given ad-hoc set of students, courses, sections, staff, and to be filtered by student group.



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.



Reports Screen, Advanced Tab

Available Reports

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

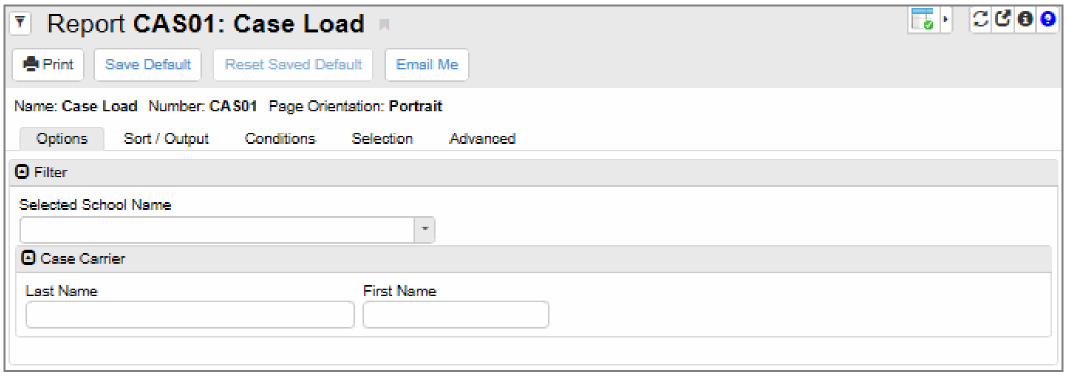
1. Navigate to **Synergy SE > Staff > Reports**.
2. Select the report.
3. Select the **Options**, **Sort/Output**, **Conditions**, **Selection**, and **Advanced** options for the report.
4. Click **Print**.

Staff Reports

CAS01: Case Load

Synergy SE > Staff > Reports

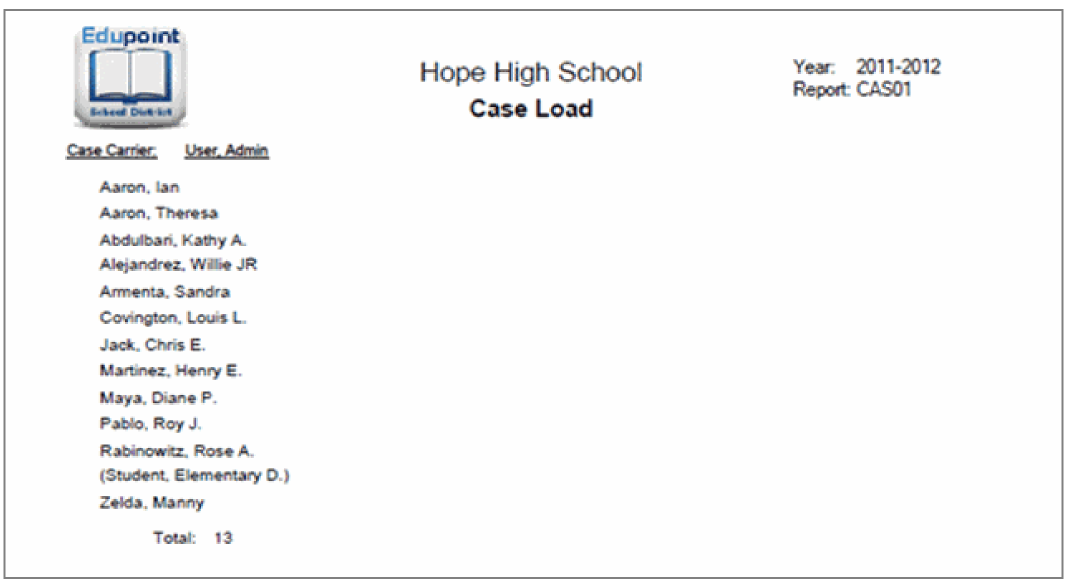
The Case Load report prints the case load for each case manager at the selected school. The report includes the list of students for whom the user is listed as case manager or case carrier on the student's team list.



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.

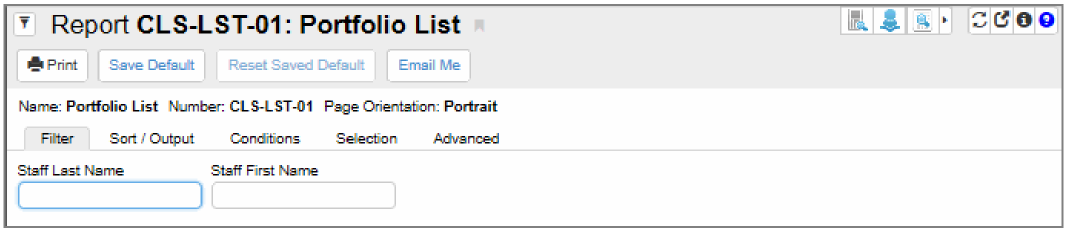


CAS01: Case Load Output

CLS-LST-01: Portfolio List

Synergy SE > Staff > Reports

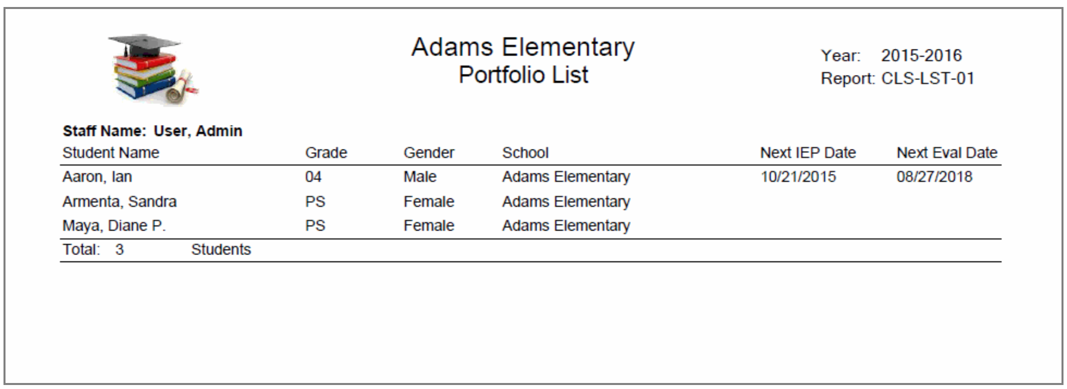
The Portfolio List report prints the class list for the selected staff member. The report includes the list of students for whom the user is listed as a team member. The grade, gender, school, next IEP date, and next evaluation day is included in the report.



CLS-LST-01: Portfolio List Report Interface Screen

Report Options:

- **Staff Last Name**
- **Staff First Name**



Adams Elementary
Portfolio List

Year: 2015-2016
Report: CLS-LST-01

Staff Name: User, Admin

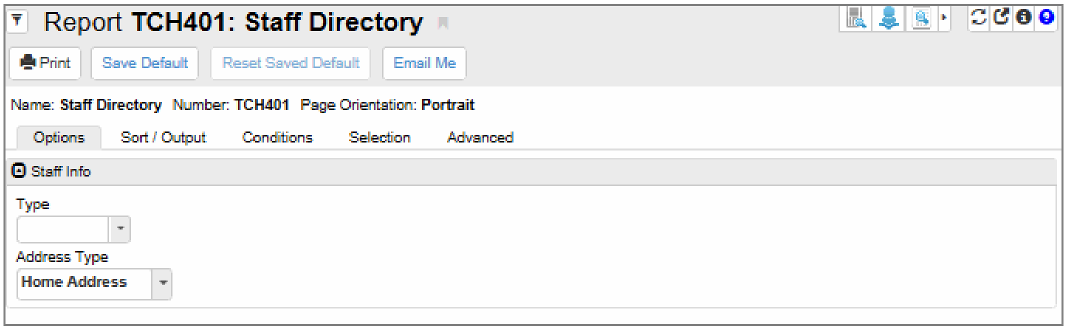
Student Name	Grade	Gender	School	Next IEP Date	Next Eval Date
Aaron, Ian	04	Male	Adams Elementary	10/21/2015	08/27/2018
Armenta, Sandra	PS	Female	Adams Elementary		
Maya, Diane P.	PS	Female	Adams Elementary		
Total: 3 Students					

CLS-LST-01: Portfolio List Output

TCH401: Staff Directory

Synergy SE > Staff > Reports

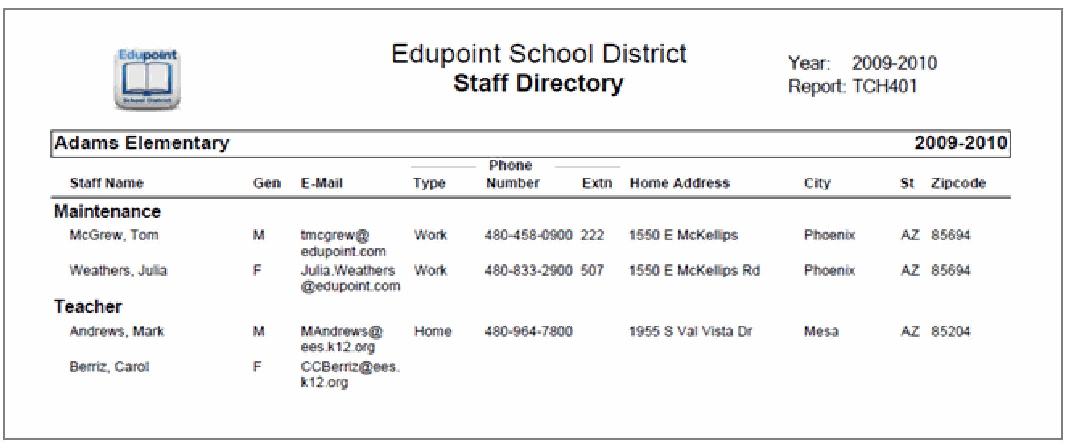
The Staff Directory report lists all staff including their email, primary phone number, and address. The list is sorted by staff type.



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.



Edupoint School District
Staff Directory
Year: 2009-2010
Report: TCH401

Adams Elementary									2009-2010
Staff Name	**Gen**	**E-Mail**	**Type**	**Phone Number**	**Extn**	**Home Address**	**City**	**St**	**Zipcode**
Maintenance									
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
Teacher									
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

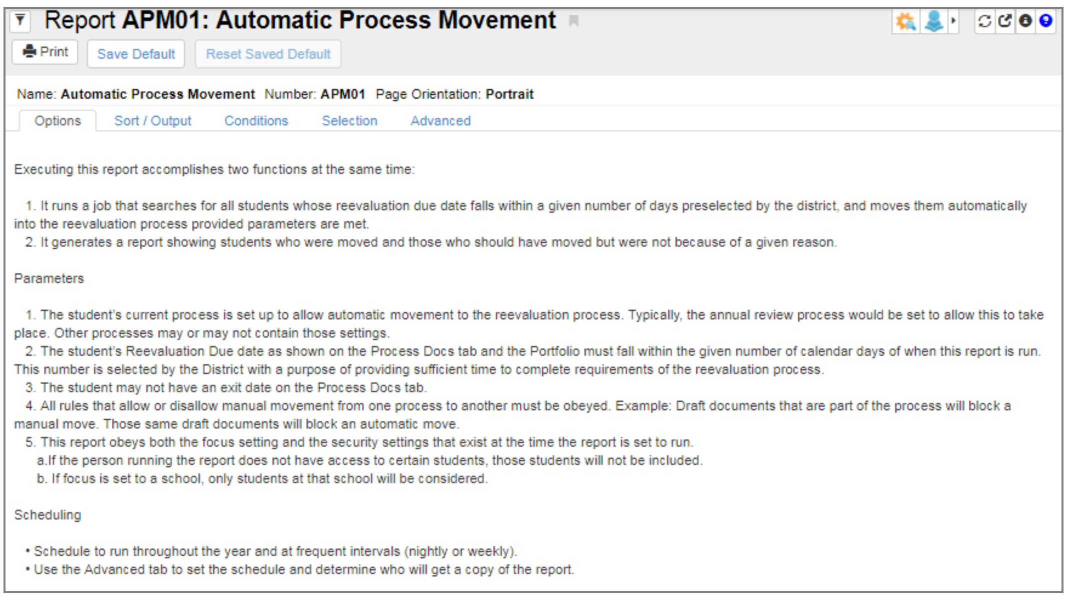
Synergy SE > Student > Reports

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:

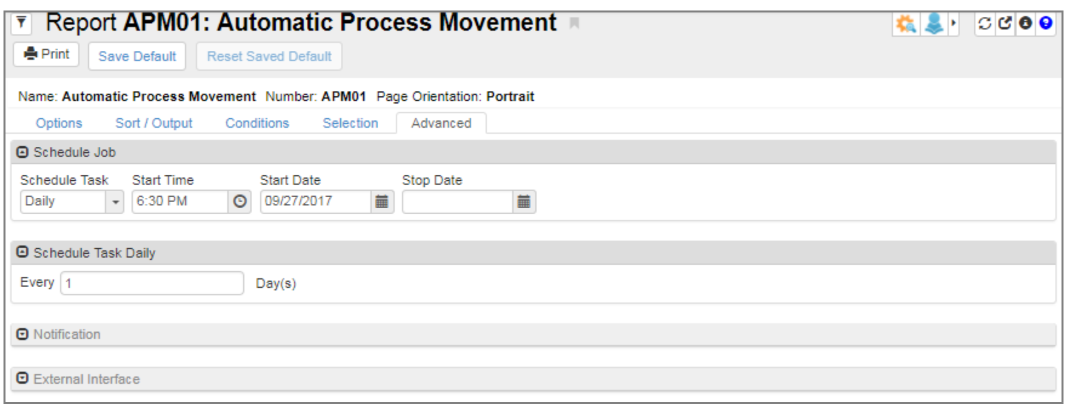
The report follows the following rules:

- 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

Edupoint School District
Automatic Process Moves

Year: 2016-2017
Report: APM01

School: Hope High School

Student Name	SIS Number	Grade	Student Moved	Message
Abbott, Billy A	903456	10	No	Student Reevaluation date is less than today's date.

School: Jefferson Elementary

Student Name	SIS Number	Grade	Student Moved	Message
James, Mary R	978978	5	No	Student Reevaluation date is less than today's date.

School: King High School

Student Name	SIS Number	Grade	Student Moved	Message
Acosta, Joseph G	172306	11	No	Student Reevaluation date is less than today's date.

School: Lincoln Elementary

Student Name	SIS Number	Grade	Student Moved	Message
Ackerman, Brian	120952	3	No	Student Reevaluation date is less than today's date.

School: Adams Elementary

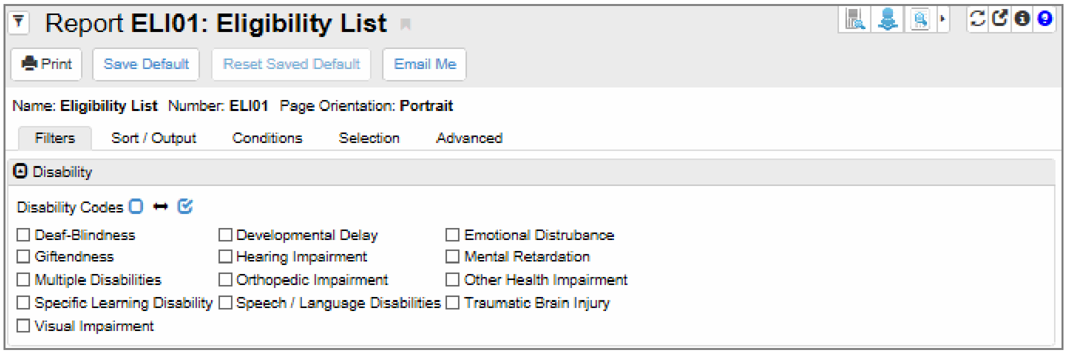
Student Name	SIS Number	Grade	Student Moved	Message
Aaron, Ian	132123	1	Yes	

APM01: Automatic Process Movement Output

ELI01: Eligibility List

Synergy SE > Student > Reports

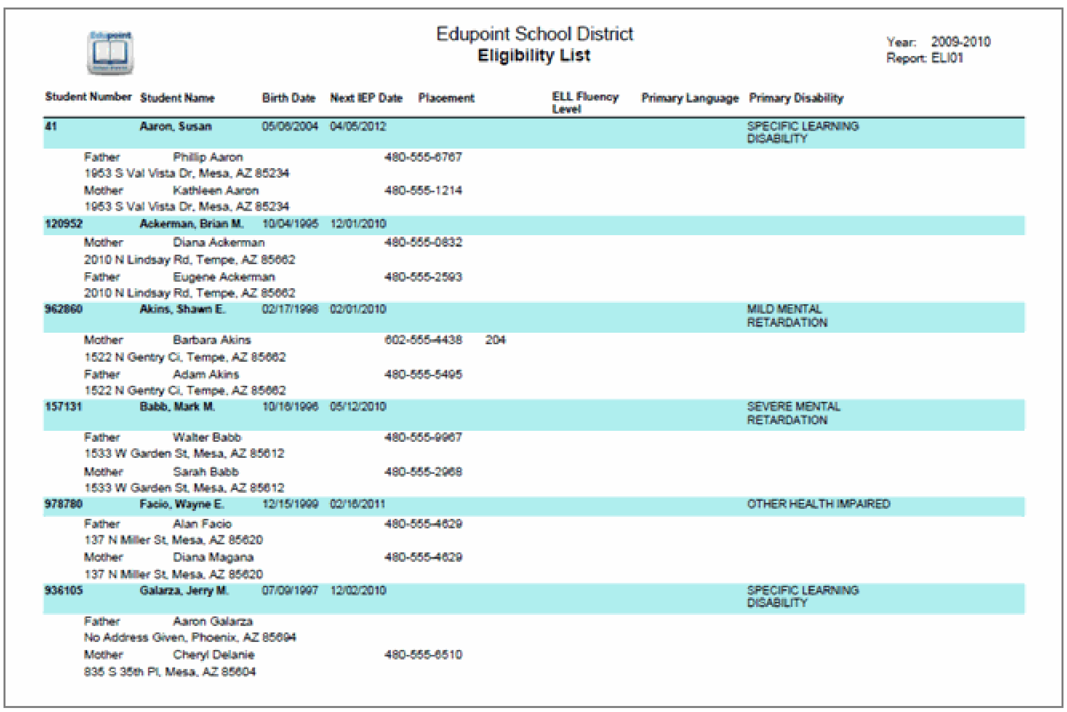
The Eligibility List report provides a list of students based on primary disability options selected. The report includes student name, ID and address, parent information, primary language, and disability.



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

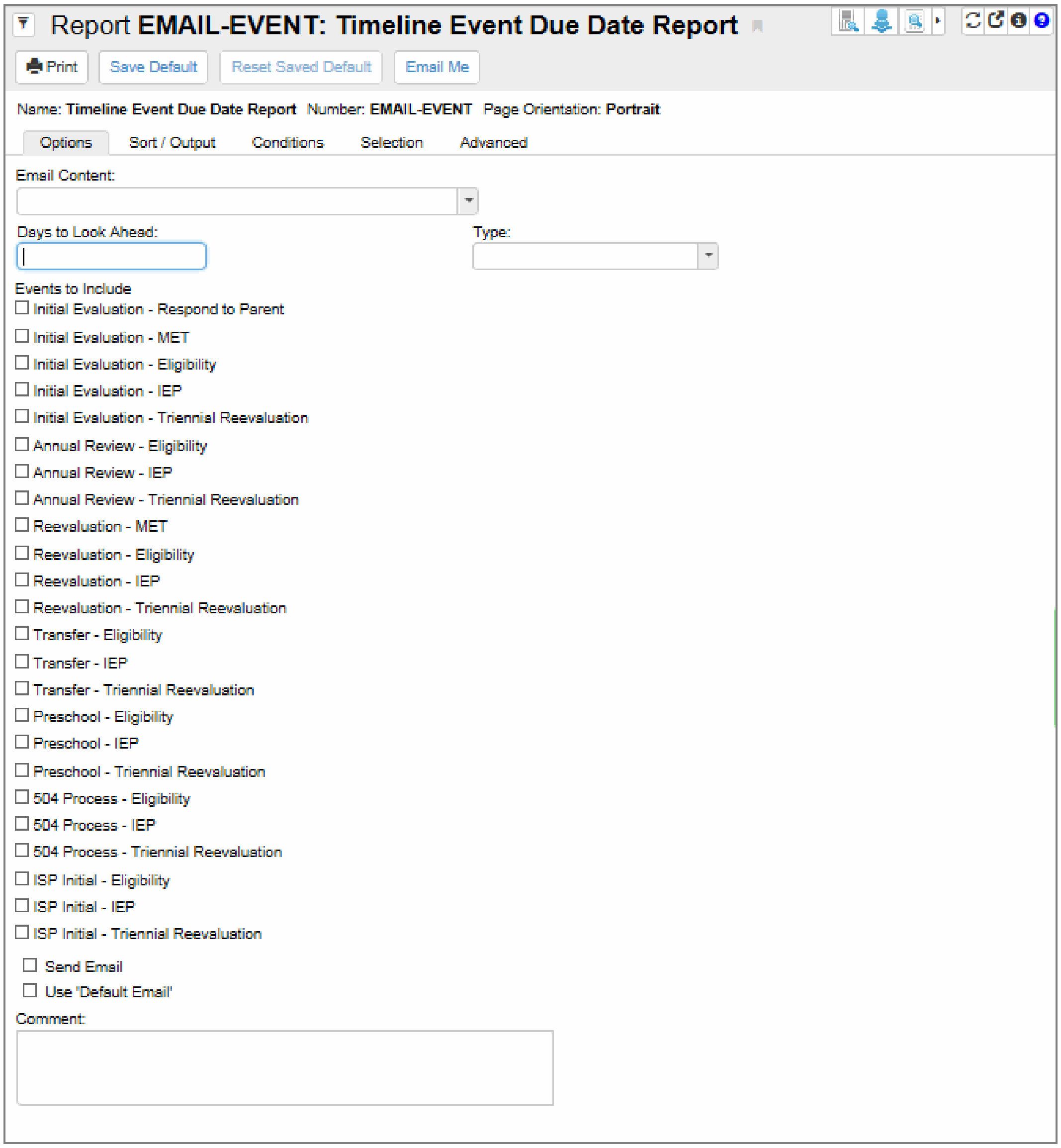
Student Number	Student Name	Birth Date	Next IEP Date	Placement	ELL Fluency Level	Primary Language	Primary Disability
41	Aaron, Susan	05/06/2004	04/05/2012				SPECIFIC LEARNING DISABILITY
	Father Phillip Aaron 480-555-6767 1953 S Val Vista Dr, Mesa, AZ 85234 Mother Kathleen Aaron 480-555-1214 1953 S Val 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 Ci, Tempe, AZ 85662 Father Adam Akins 480-555-5495 1522 N Gentry Ci, 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						
936105	Galarza, Jerry M.	07/09/1997	12/02/2010				SPECIFIC LEARNING DISABILITY
	Father Aaron Galarza No Address Given, Phoenix, AZ 85694 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

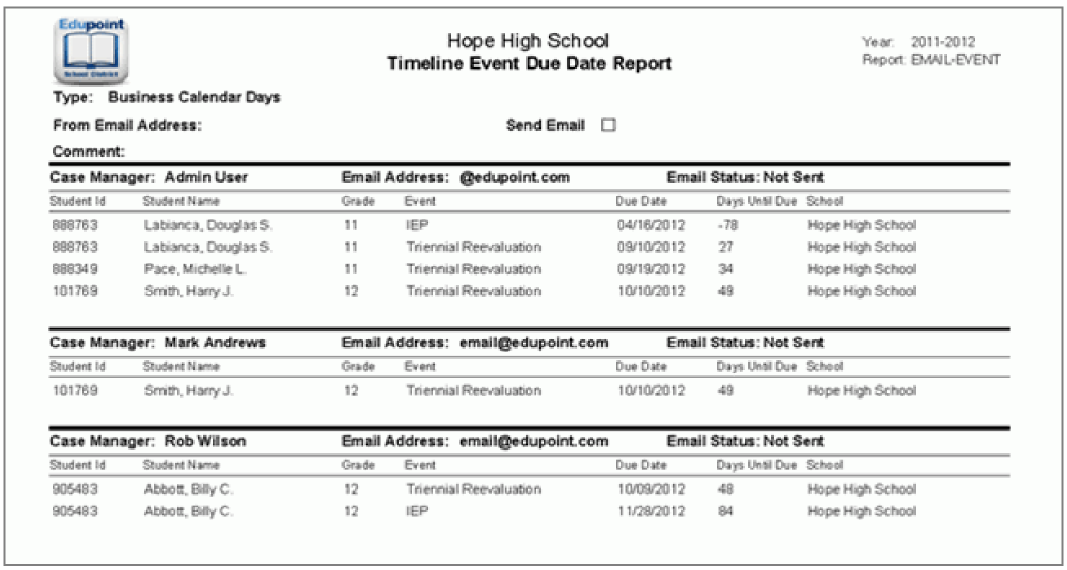
The Timeline Event Due Date Report lists all case managers with a student that has a timeline event for the period selected. It can create a report and/or send emails to the individual case managers.



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.



Hope High School
Timeline Event Due Date Report

Year: 2011-2012
Report: EMAIL-EVENT

Type: Business Calendar Days
From Email Address: Send Email ☐
Comment:

Case Manager: Admin User **Email Address: @edupoint.com** **Email Status: Not Sent**

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
101769	Smith, Harry J.	12	Triennial Reevaluation	10/10/2012	49	Hope High School

Case Manager: Mark Andrews **Email Address: email@edupoint.com** **Email Status: Not Sent**

Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
101769	Smith, Harry J.	12	Triennial Reevaluation	10/10/2012	49	Hope High School

Case Manager: Rob Wilson **Email Address: email@edupoint.com** **Email Status: Not Sent**

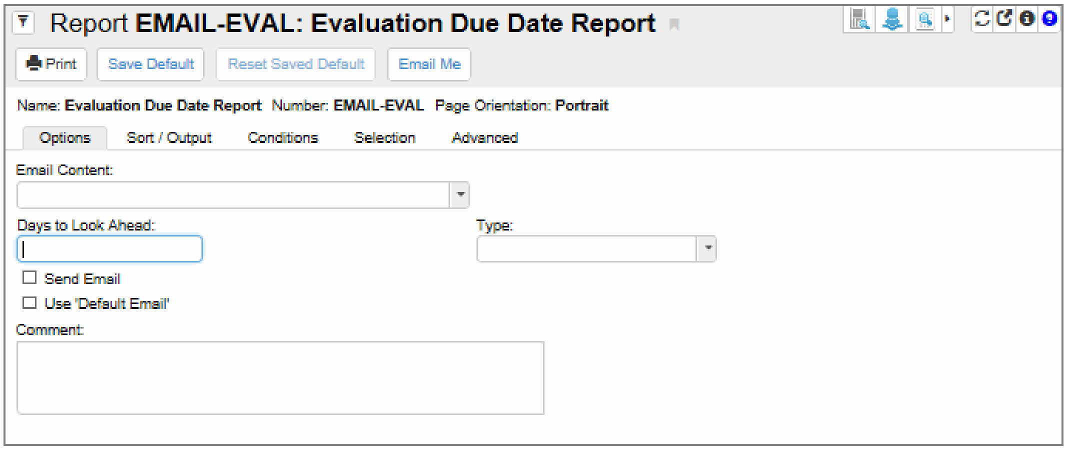
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	Triennial Reevaluation	10/09/2012	48	Hope High School
905483	Abbott, Billy C.	12	IEP	11/28/2012	84	Hope High School

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.



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** ☐

Comment:

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	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

Case Manager: Mark Andrews **Email Address:** email@edupoint.com **Email Status:** Not Sent

Student Id	Student Name	Grade	Due Date	Days Until Due	School
101769	Smith, Harry J.	12	10/10/2012	49	Hope High School

Case Manager: Rob Wilson **Email Address:** email@edupoint.com **Email Status:** Not Sent

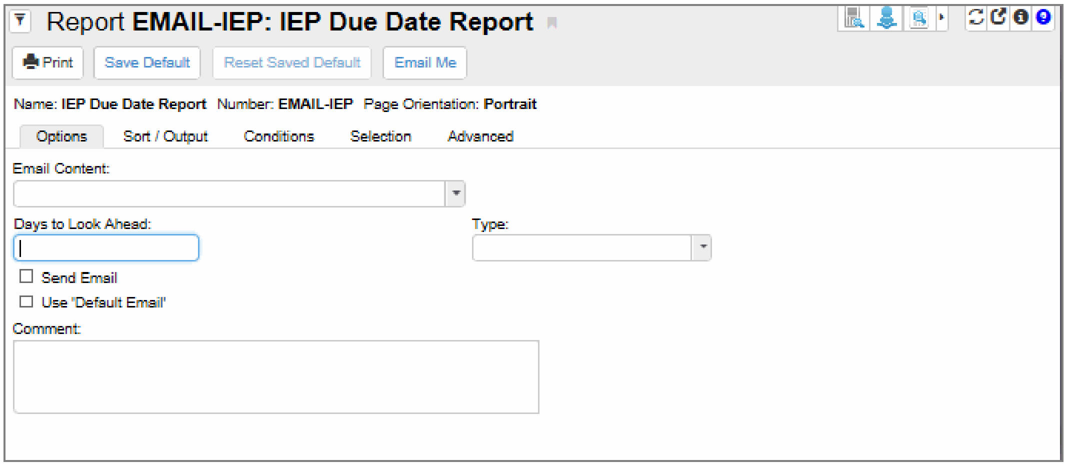
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	10/09/2012	48	Hope High School

EMAIL-EVAL: Evaluation Due Date Report Output

EMAIL-IEP: IEP Due Date Report

Synergy SE > Student > Reports

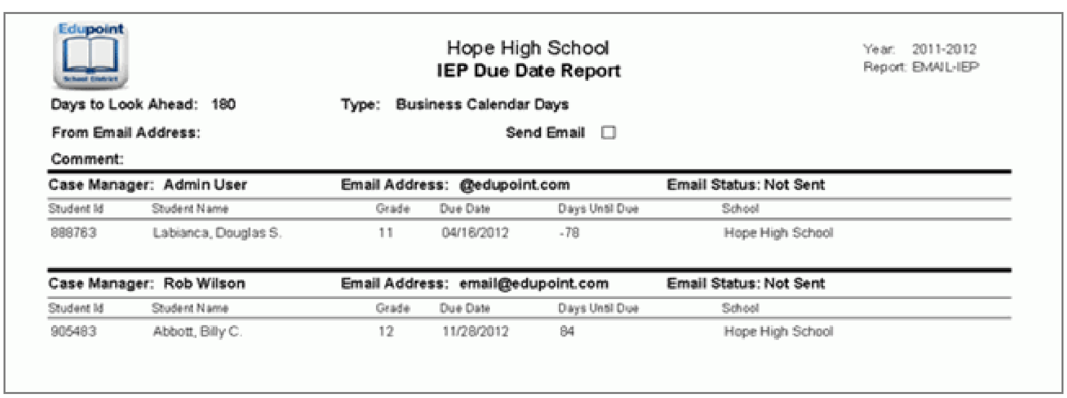
The IEP Due Date Report lists all case managers with a student that has an IEP due for the period selected. It can create a report and/or send emails to the individual case managers.



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.

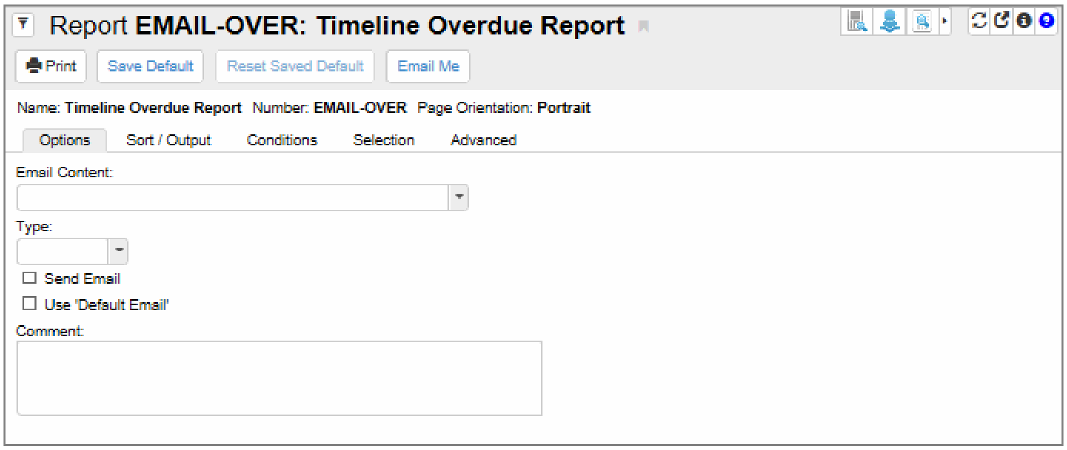


EMAIL-IEP: IEP Due Date Report Output

EMAIL-OVER: Timeline Overdue Report

Synergy SE > Student > Reports

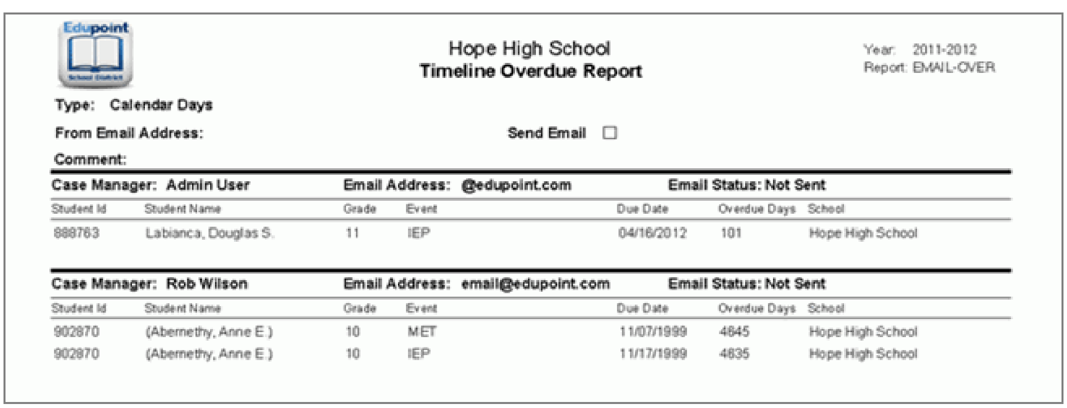
The Timeline Overdue Report lists all case managers with a student that has an overdue timeline event, including eligibility, IEP, or triennial reevaluation, for the period selected. It can create a report and/or send emails to the individual case managers.



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.



Hope High School
Timeline Overdue Report

Year: 2011-2012
Report: EMAIL-OVER

Type: Calendar Days
From Email Address: Send Email
Comment:

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

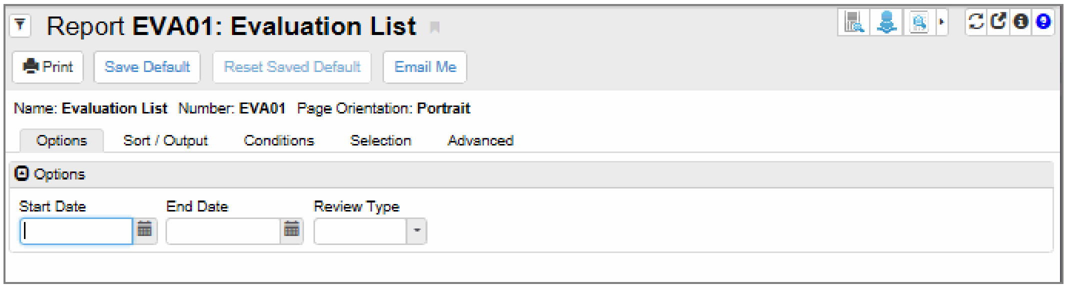
Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School
902870	(Abernethy, Anne E.)	10	MET	11/07/1999	4645	Hope High School
902870	(Abernethy, Anne E.)	10	IEP	11/17/1999	4635	Hope High School

EMAIL-OVER: Timeline Overdue Report Output

EVA01: Evaluation List

Synergy SE > Student > Reports

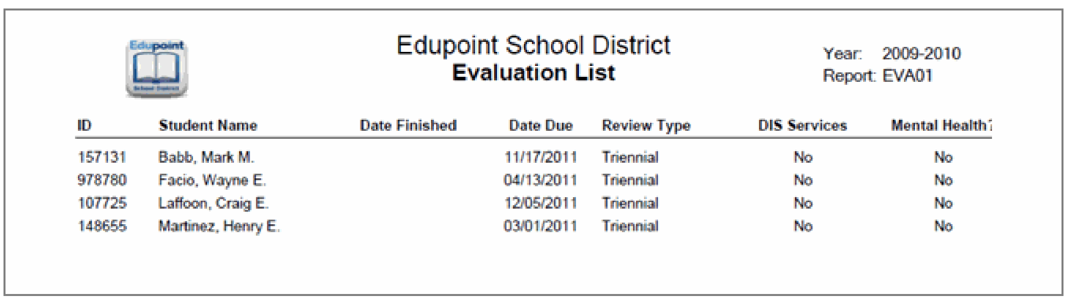
The Evaluation List displays students due for the specified review type within a specified date range.



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 School District
Evaluation List

Year: 2009-2010
Report: EVA01

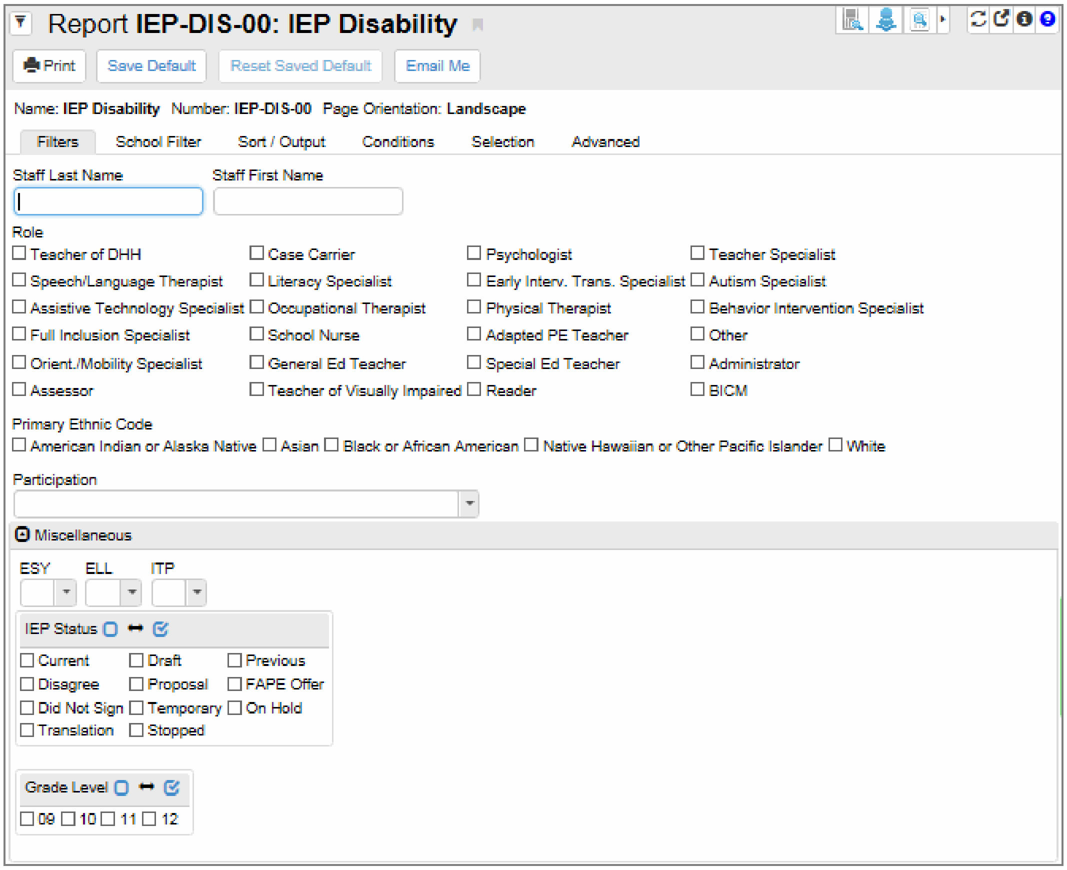
ID	Student Name	Date Finished	Date Due	Review Type	DIS Services	Mental Health
157131	Babb, Mark M.		11/17/2011	Triennial	No	No
978780	Facio, Wayne E.		04/13/2011	Triennial	No	No
107725	Laffoon, Craig E.		12/05/2011	Triennial	No	No
148655	Martinez, Henry E.		03/01/2011	Triennial	No	No

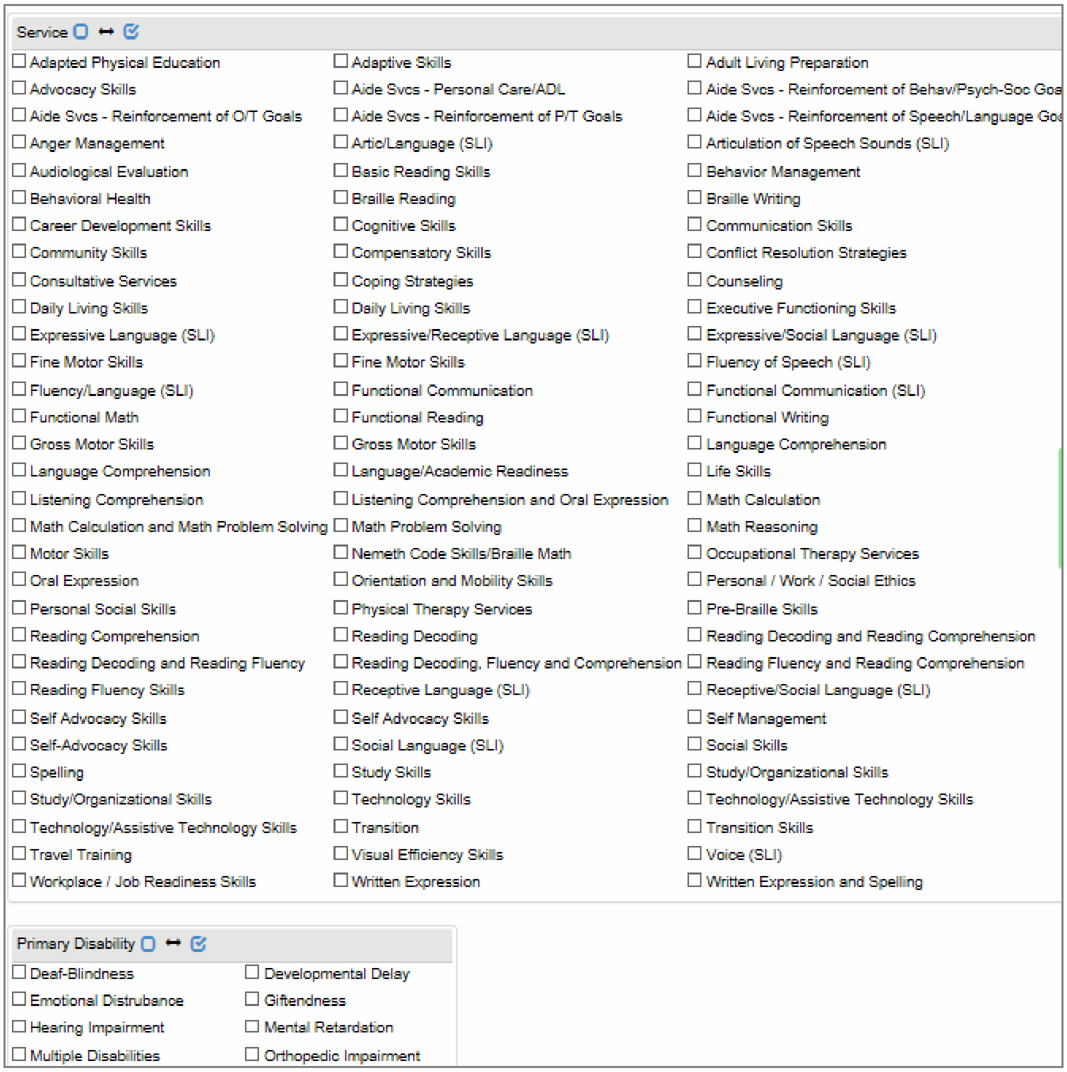
EVA01: Evaluation List Output

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.





Service

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

Primary Disability

Deaf-Blindness	Developmental Delay
Emotional Distrubance	Giftendness
Hearing Impairment	Mental Retardation
Multiple Disabilities	Orthopedic Impairment

IEP-DIS-00: IEP Disability Report Interface Screen

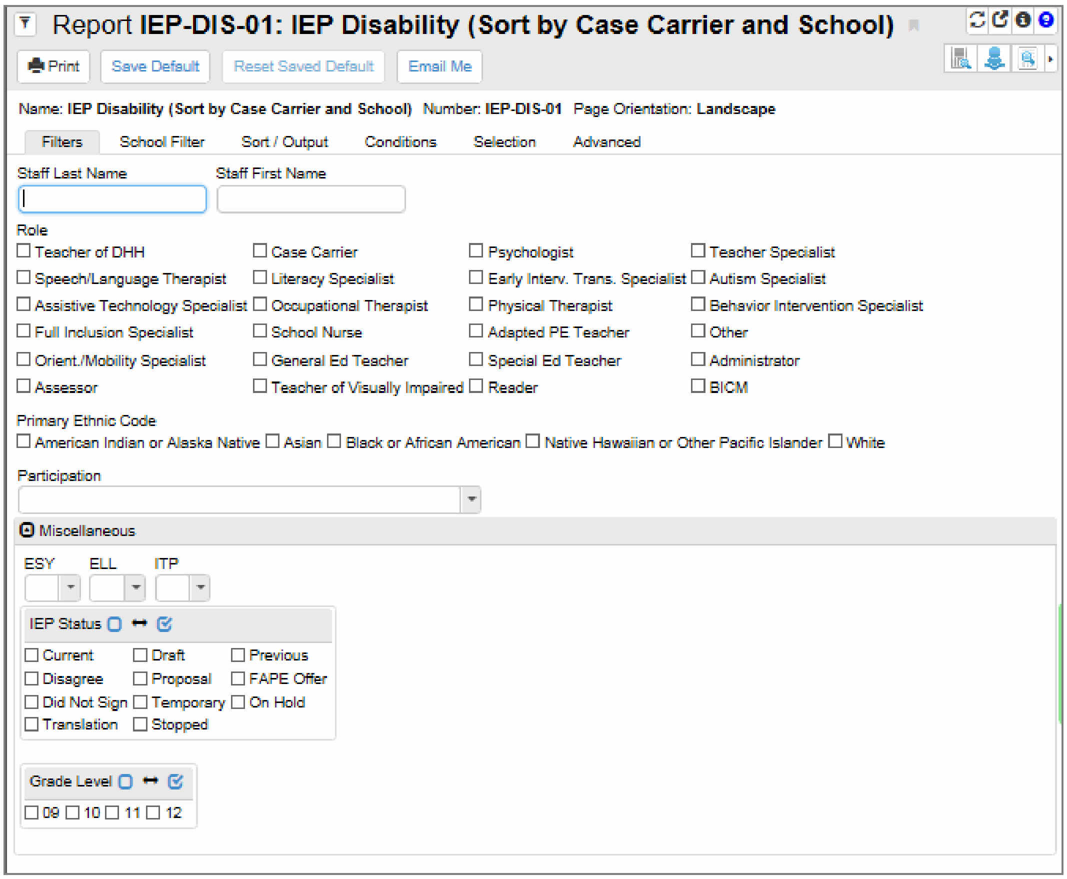
Report Options:

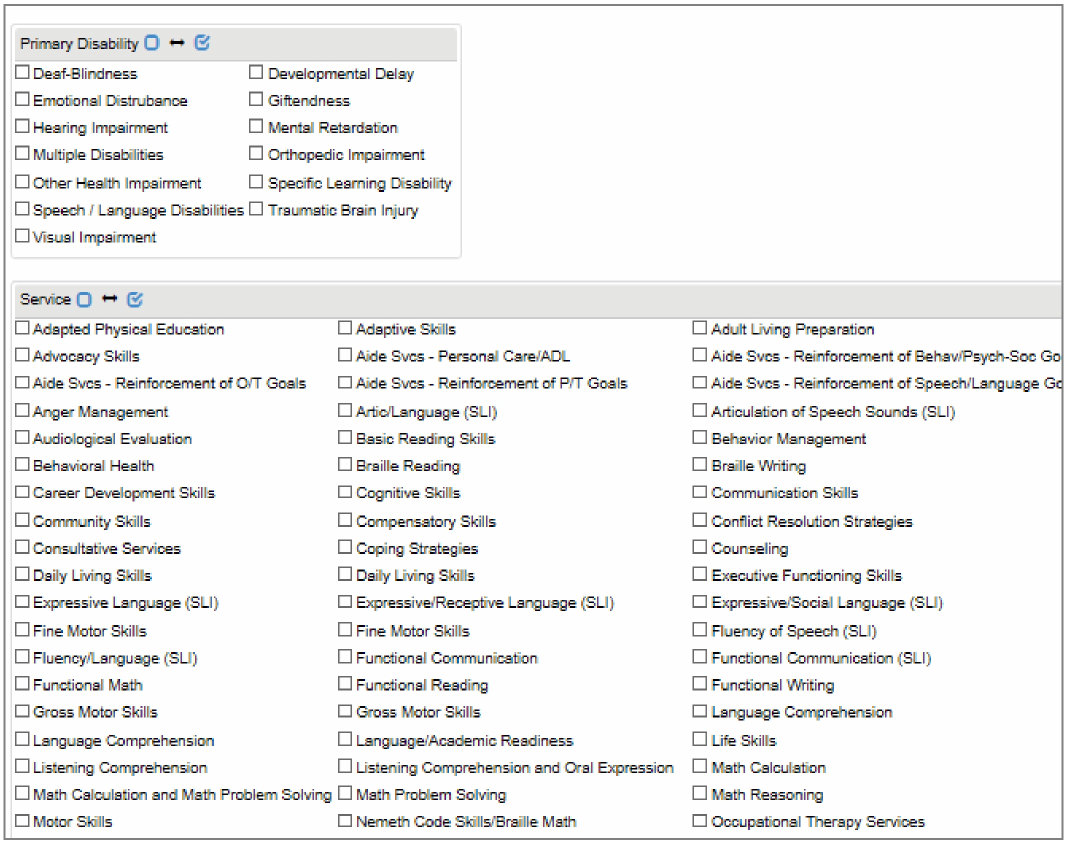
- **Role** – Select the options to limit the report to the selected roles.
- **Primary Ethnic Code** – Select the options to limit the report the selected codes.
- **Participation** – Select to limit the report to the selected participation type.
- **IEP Status** – Select the options to limit the report 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.





IEP -DIS-01: IEP Disability Report Interface Screen

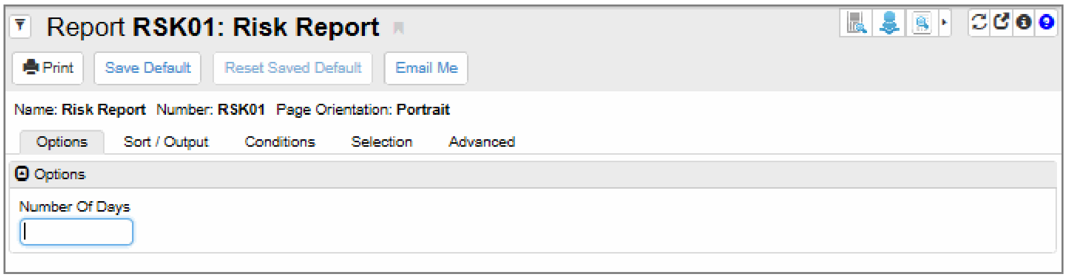
Report Options:

- **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

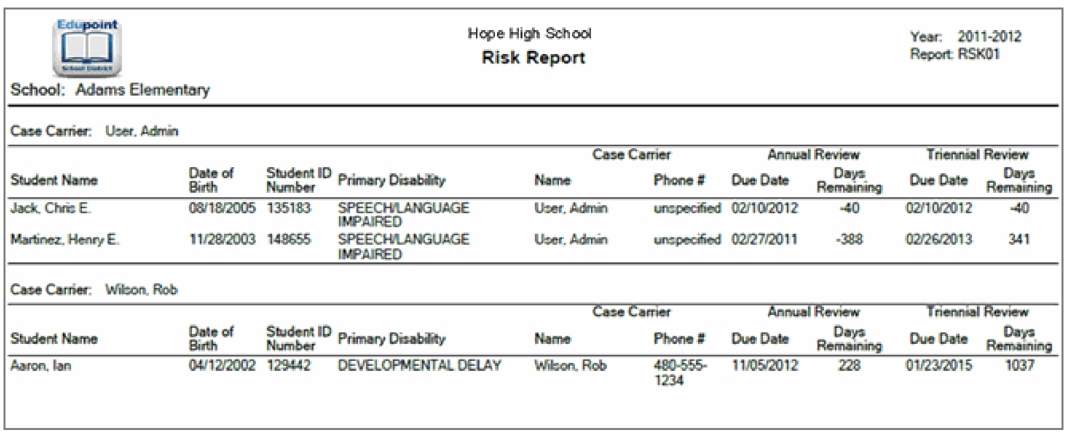
The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by school (new page per location), with case manager name and phone, and due date and days remaining until the event.



RSK01: Risk Report Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK01

School: Adams Elementary

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

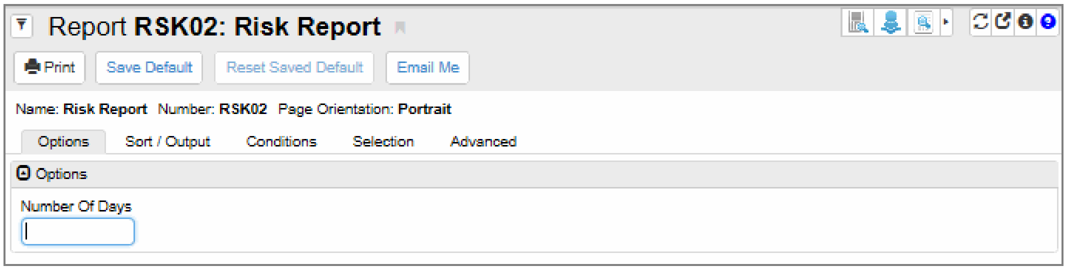
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Aaron, Ian	04/12/2002	129442	DEVELOPMENTAL DELAY	Wilson, Rob	480-555-1234	11/05/2012	228	01/23/2015	1037

Risk Report, RSK01

RSK02: Risk Report

Synergy SE > Student > Reports

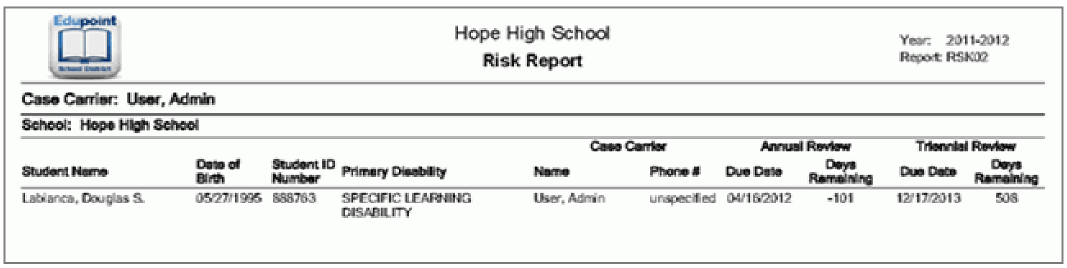
The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK02: Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK02

Case Carrier: User, Admin

School: Hope High School

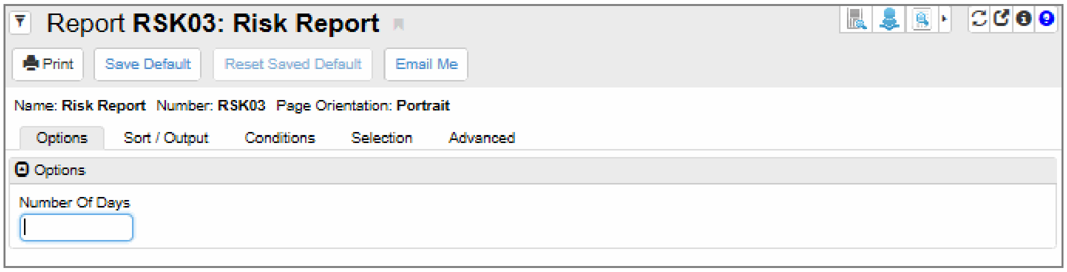
				Case Carrier		Annual Review		Triennial Review	
Student Name	Date of Birth	Student ID Number	Primary Disability	Name	Phone #	Due Date	Days Remaining	Due Date	Days Remaining
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/16/2012	-101	12/17/2013	508

RSK02: Risk Report Output

RSK03: Risk Report

Synergy SE > Student > Reports

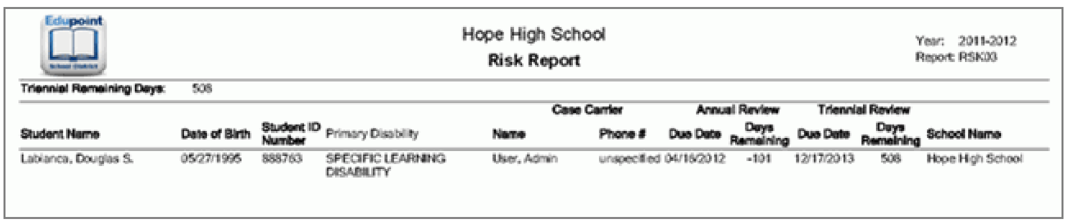
The Risk Report lists all special education students who have a triennial review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK03: Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK03

Triennial Remaining Days: 508

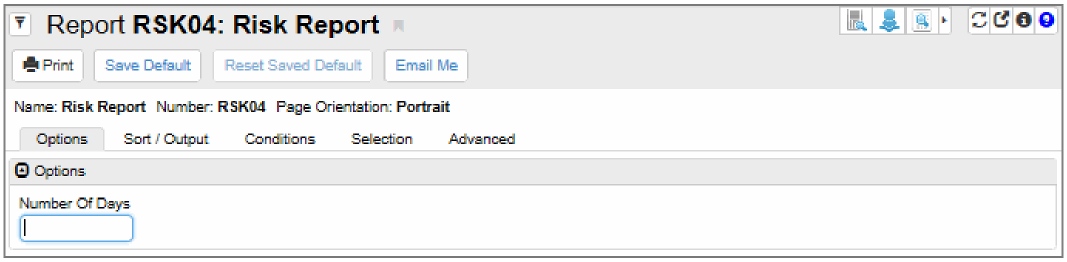
				Case Carrier		Annual Review		Triennial Review		
Student Name	Date of Birth	Student ID Number	Primary Disability	Name	Phone #	Due Date	Days Remaining	Due Date	Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/16/2012	-101	12/17/2013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

RSK03: Risk Report Output

RSK04: Risk Report

Synergy SE > Student > Reports

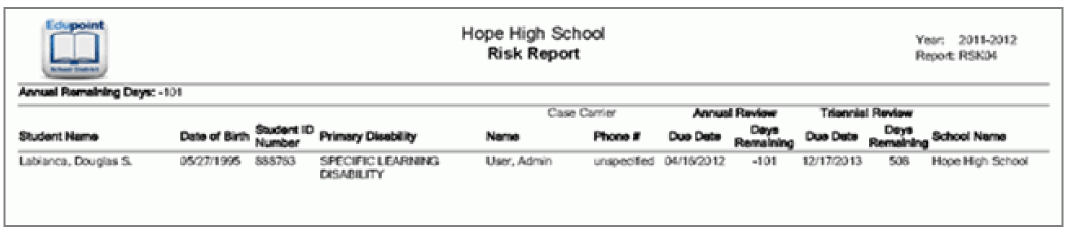
The Risk Report lists all special education students who have an annual review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK04: Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK04

Annual Remaining Days: -101

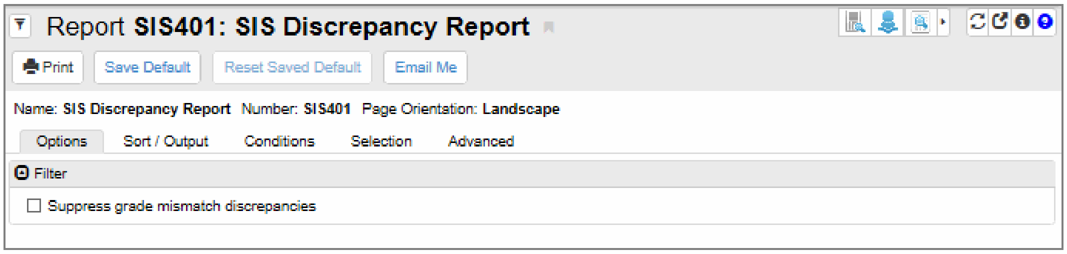
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin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

RSK04: Risk Report Output

SIS401: SIS Discrepancy Report

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

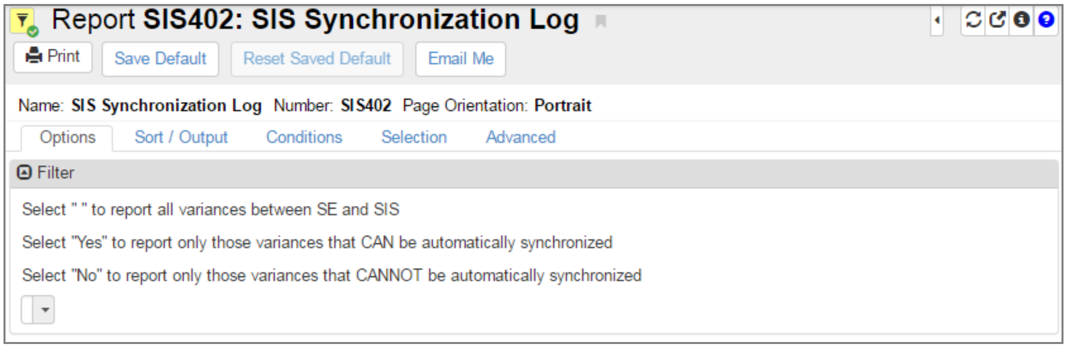
Report Options:

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

SIS402: SIS Synchronization Log

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

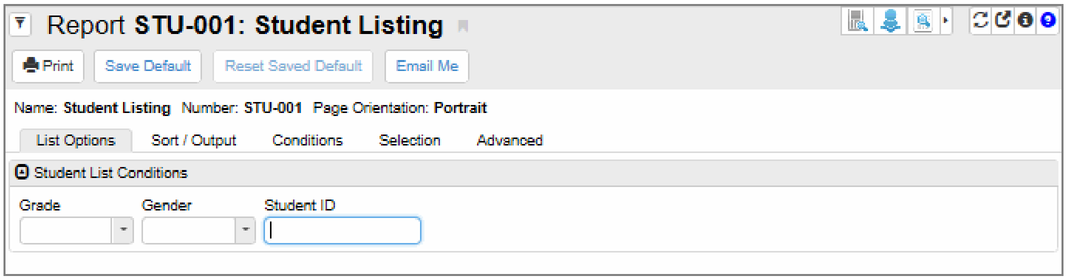
Report Options:

- 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

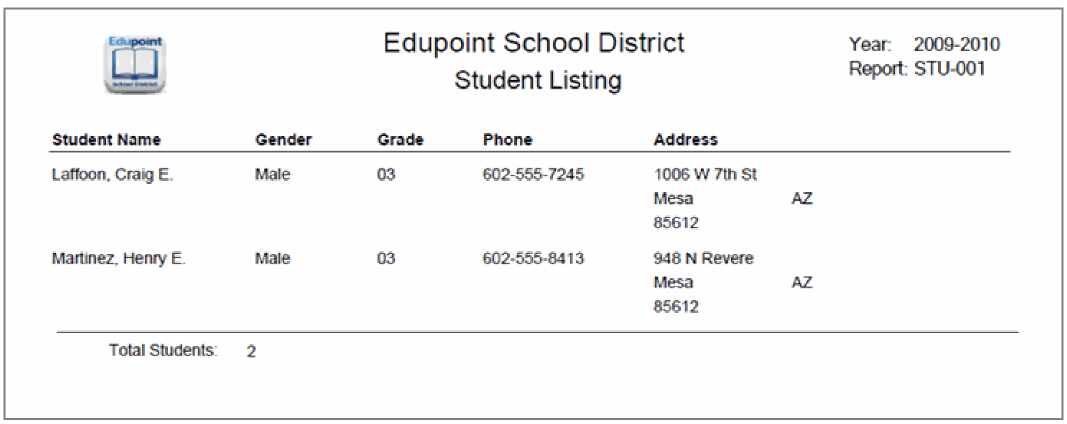
Lists Student Name, Gender, Grade Phone and Address of Students according to the Focus (for example, School or District) according to parameters specified.



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 School District
Student Listing
Year: 2009-2010
Report: STU-001

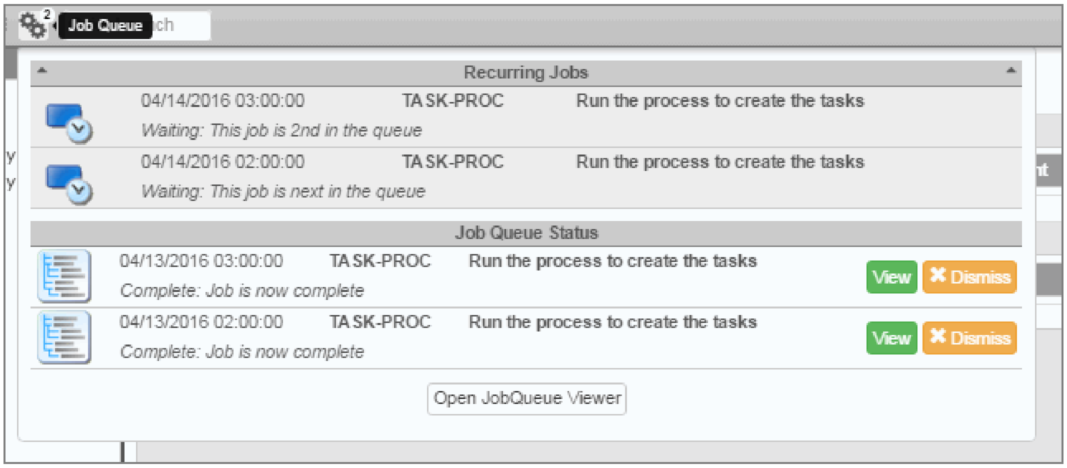
Student Name	Gender	Grade	Phone	Address
Laffoon, Craig E.	Male	03	602-555-7245	1006 W 7th St Mesa AZ 85612
Martinez, Henry E.	Male	03	602-555-8413	948 N Revere Mesa AZ 85612

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.

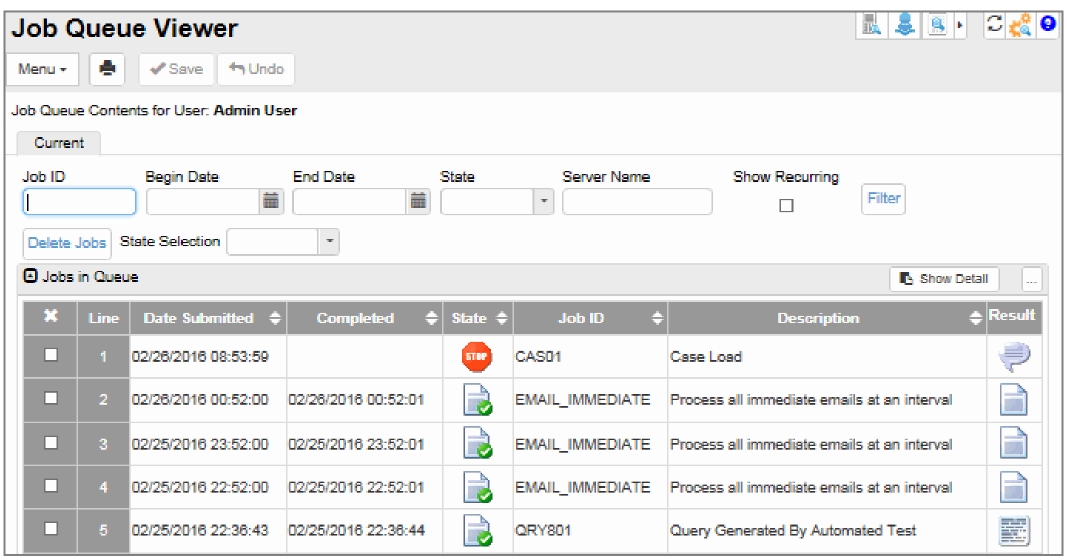


Job Queue

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**.