

# ***Synergy SIS***<sup>©</sup>

## **STATE OF ARIZONA DATA REPORTING USER GUIDE**



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# ABOUT THIS MANUAL

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

The table below lists the release date, software version, documentation volume number, and the content included in each volume of documentation to date.

## Software and Document History

Date	Volume	Edition	Revision	Content
May 2009	1	1	1	Initial release of this document
August 2009	1	1	2	Incorporated the changes from the July 2009 release of the software
March 2010	1	1	3	Updated to include changes from the November 2009 release and the February and March 2010 patches.
August 2011	1	1	4	Updated to include changes from the June 2011 release and August 2011 patches.

## CONVENTIONS USED IN THIS MANUAL

### **Bold Text**

**Bold Text** - Indicates a button or menu or other text on the screen to click, or text to type.



**Tip** – Suggests advanced techniques or alternative ways of approaching the subject.



**Note** – Provides additional information or expands on the topic at hand.



**Reference** – Refers to another source of information, such as another manual or website



**Caution** – Warns of potential problems. Take special care when reading these sections.

## BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, please be sure to rescreen the system requirements and make sure the district's computer hardware and software meet the minimum requirements. If there are any questions about the system requirements, please contact an Edupoint representative at (877) 899-9111.



**Caution:** The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

At any point, if there are any technical difficulties, please contact the Edupoint technical support team at [support@edupoint.com](mailto:support@edupoint.com) or by phone at 1-877-899-9111 option 1.



# Chapter One: THE SAIS SUBMISSION PROCESS

In this chapter, the following topics are covered:

- ▶ The four steps of the SAIS Submission process
- ▶ How to run the SAIS Submission process
- ▶ How to customize the submission options

# OVERVIEW OF THE STATE OF ARIZONA DATA REPORTING

Synergy SIS provides a seamless process to report the required data to the state of Arizona, and allows the district to simplify this process to the point where no manual intervention is required. Some of the notable features of the SAIS Data Reporting include:

- Synergy SIS sends all data at the district level so only one upload is needed for the entire district. Separate uploads for each school are not required.
- Synergy SIS can automatically create the transactions needed to report special program information such as ELL or Special Education. This is part of the normal submission process and does not need to be handled separately.
- Synergy SIS connects directly to the state's SAIS system. There is no need to create a separate file and manually upload it into the SAIS system.
- Synergy SIS automatically downloads new SAIS IDs when they are available. A separate download or separate data entry is not required.
- Synergy SIS automatically downloads the results of an uploaded transaction file and processes the results, providing the district with a more user-friendly report of any errors reported by the state. This process also ensure that the data in Synergy SIS stays synchronized with the data uploaded at the state, and will automatically resubmit failed transactions when the error in the data entry is fixed.
- Synergy SIS is updated every year to reflect the changes introduced by the Dept. of Education, and to ensure compliance with any state regulations. These updates are provided to the district at no additional cost (with an active support & maintenance contract).
- To double-check the data collected by the state and ensure the district's data is captured correctly, Synergy SIS provides the SAIS Comparison tool to compare all data collected in Synergy SIS against one of the state reports such as the ADMS72 or ADMS75 reports.
- The data submission process may be scheduled to run automatically with no manual intervention required.

## What is a transaction?

A transaction is a line in the file that is uploaded to the state that changes an individual student's records. An example of a transaction would be an entry that notifies the state that a specific student has enrolled in the school. Each transaction can either add information to the state's database, change existing information, or delete existing information.

There are a number of different transactions that are submitted to the state, and they fall into two general categories. Enrollment-related transactions submit information relating to the student's enrollment in the school such as withdrawals or absences. Need-related transactions submit information regarding the student's special needs and participation in need-related programs such as ELL or Special Education. The list of possible transactions is outlined on the next page.

**Student Enrollment-Related Transactions**

- 001 Student Enrollment
- 002 Student Readmission
- 003 Student Withdrawal
- 004 Student Absence
- 005 Student Personal Information
- 006 Student Membership Change
- 007 Student District of Residence Transfer
- 008 Student FTE
- 009 Student Grade Transfer
- 010 Student Payer Factors
- 016 Student Year End Status
- 017 Student Attendance
- 018 Student Summer Withdrawal
- 020 Community College Classes
- 022 Student Test Label

**Student Needs-Related Transactions****All Needs**

- 011 Student Need

**Language Needs**

- 012 Student Assessment
- 013 Language Program Participation

**Special Education Needs**

- 014 SPED Service Participation
- 021 Initial IEP

**Early Childhood Program Needs**

- 023 Early Childhood Program Participation
- 024 Early Childhood Preschool Assessment

**All Other Programs**

- 015 Support Program Participation

## How is the data collected?

The state requires that data be collected and submitted to the SAIS system regarding three general categories of student data:

- Student enrollment information
- Student attendance information
- Student participation in special programs such as ELL or Special Education

Student enrollment information is entered into the Student screen as part of the process of normal enrollment process. Attendance data is entered into Synergy SIS as part of the normal process of taking attendance. No special data entry is required to capture the information required by the state. Information regards the student's participation in special programs such as ELL or Special Education is recorded in the screens in the Student Programs folder.

## How is the data verified and checked?

Synergy SIS is capable of making every data entry field mandatory, and checking the data at the time it is entered. However, this approach for most districts is not practical because all data may not be available at the moment a student is enrolled or whenever some other data entry occurs. Instead, extensive validation is run when the upload is created based on the complex SAIS transaction validation rules from the state. These validation rules are updated when the state makes any changes to the SAIS transactions rules.

If any errors or invalid data are encountered in the data when the upload is created, transactions based on that data is not included in the upload. However, the upload will still be created and sent to the state with all the data that passed the validation process. The errors found are summarized in a PDF report that pops-up on the screen when the file creation process is complete. This allows the correct data to still be submitted in a timely manner, but problems in the data are still identified so they can be corrected. Once the errors are fixed, those transactions are included in the next upload.

## Where is this information located in Synergy SIS?

Data is collected throughout the Synergy SIS system for upload to the state. The demographic and enrollment information is collected through the Student screen, located in the Student folder. Attendance information is collected through the screens in the Attendance folder. Information regarding student participation in special program such as ELL or Special Education is captured in the screens in the Student Programs folder. The collected data is then processed and submitted using the screens in the AZ folder. To see exactly where each element of a SAIS transaction is recorded in Synergy SIS, please refer to Chapter Five of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

Entering information into the Student screen is explained in the *Synergy SIS – Student Information User Guide*. Attendance recording is covered in the *Synergy SIS – Attendance User Guide*. This manual illustrates how to record and edit data for the special programs,

and how to submit the collected data to the state of Arizona. It rescreens all screens and reports in the AZ folder and the Student Programs folders. There are also a number of reports that can be generated from this information, and Chapter Eleven rescreens the available reports and shows how to customize and print these reports.

The companion manual to this User Guide, *Synergy SIS – State of Arizona Data Reporting Administrator Guide*, covers the setup and configuration required for the special programs and the data submission process.

## THE FOUR STEPS OF THE SUBMISSION PROCESS

SAIS reporting in Synergy SIS consists of 4 steps. Throughout this reporting process, Synergy SIS reports the success or failure of any given step on screen so the progress of the submission can be monitored. The steps are:

1. **Creation:** The first step in the process is the creation of the transactions that will be sent to the state. When completed, this step generates a report of any errors that need to be fixed. It also creates the final file to be sent to the state. The file created is a text file, as this is quicker to upload and preferred by the SAIS system.
2. **Upload:** The second step uploads the text file created in step 1 to the SAIS system. This is done automatically through a direct connection to the SAIS system.
3. **Download:** The third step downloads the results of the state's SAIS validation process for each transaction included in the file that was uploaded in step 2. All errors that occurred are included in a PDF report that displays on screen after the completion of this step.
4. **Process Results:** The fourth step processes the results from the state that were downloaded in step 3. This step is critical so that any transactions that were not accepted by the state can be resubmitted when the data entry errors are corrected.

Transaction generation for EVIT, JTED and AOI (formerly TAPBI) is directly supported within Synergy SIS. The transaction generation and error reporting for these types of situations occurs during the normal process of the district's SAIS transaction generation, and no special steps are needed. The log of the student's time for AOI schools can be recorded as minutes in the attendance system either through manual data entry or by importing a file using the Synergy SIS Generic Data Conversion program. This time will then be submitted to the state in addition to the membership information for the AOI program. For the AZ Safe program, Synergy SIS can create a file of the required data that can be uploaded as needed.

**Before each submission**, the person in charge of the SAIS uploads can select specific schools or students for processing. They can also limit the submission to specific types of transactions, such as enrollment transactions or State Student ID requests.

**After each submission**, be sure to rescreen the SAIS01 and SAIS02 reports for errors, and try to correct the errors prior to the next submission.



**Caution:** Prior to the first submission each year, the district must update their school calendars at the state.

## PRE-SUBMISSION SETUP



**Caution:** The User account used throughout the SAIS submission process should be setup so that the Default Mode is set to Edit. For more information on how to setup a User account, please refer to the *Synergy SIS – System Administrator Guide*.

Figure 1.1 – User Screen, Default Mode

Prior to every submission, the person in charge of the SAIS uploads can select specific schools for processing instead of uploading all transactions for the entire district. This can be helpful in large districts where processing all transactions at the same time may overload the systems. However, **all four steps of the process must be completed before another submission is processed.** Since step 3 is dependent on the state of Arizona completing their file validation, there can frequently be delays in completing all 4 steps. To select which schools will be included in the submission:

1. Check to make sure the current **focus** is set to the **district** and not a school. The focus is indicated in the top right-hand corner of the screen.



Figure 1.2 – Checking Current Focus



**Note:** Most of the SAIS Submission setup & process is conducted from the district focus.

2. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

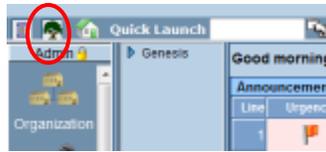


Figure 1.3 – Synergy SIS Navigation Tree

- Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 1.4 – Synergy SIS Folder

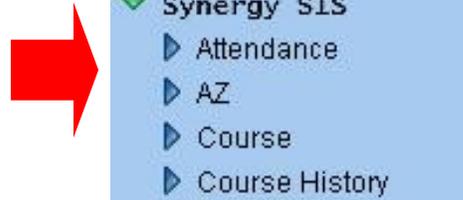


Figure 1.5 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 1.6 – AZ Folder



Figure 1.7 – AZ Folder Expanded

- Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.

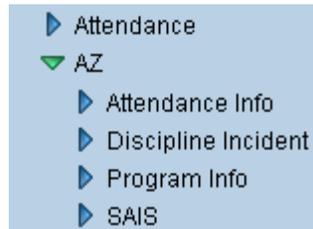


Figure 1.8 – SAIS Folder



Figure 1.9 – SAIS Folder Expanded

- Under the SAIS folder, open the **Setup** folder by clicking on the blue triangle pointing right, next to the word Setup. Once clicked, the triangle turns green and points downward.



Figure 1.10 – Setup Folder

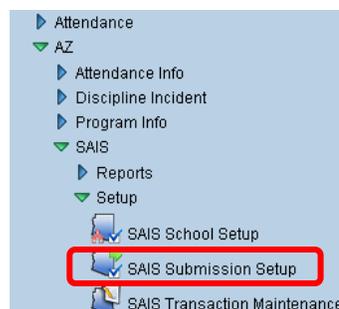


Figure 1.11 – Setup Folder Expanded

7. Click on the **SAIS Submission Setup** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 1.12 – SAIS Submission Screen Icon

8. The Schools tab of the SAIS Submission Setup screen is where schools are added or removed from the SAIS Submission process. To add a school to be processed, click on the **Chooser** button.

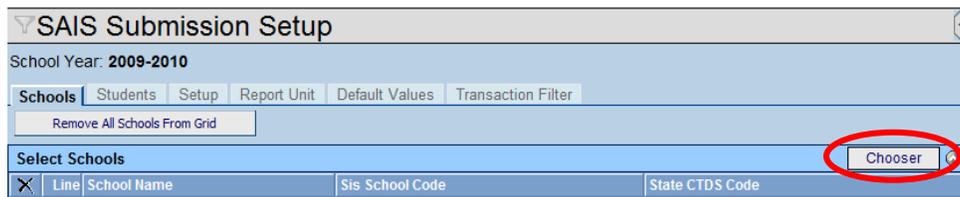


Figure 1.13 – SAIS Submission Setup Screen, Schools Tab

9. The Chooser screen appears. Click the **Find** button to list all schools, or enter the name of the school in the Find Criteria section before clicking Find to search for a specific school.

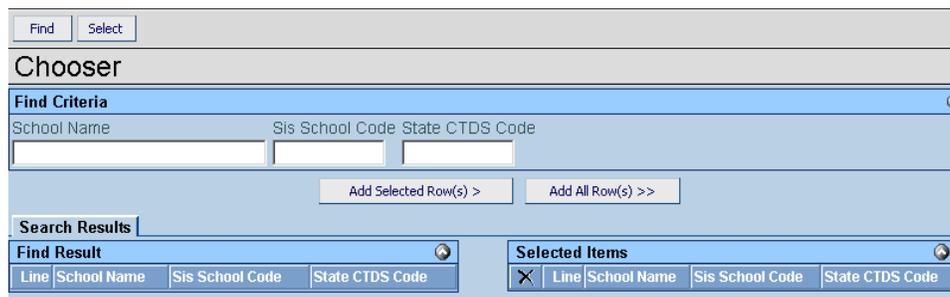


Figure 1.14 – Chooser Screen

10. The list of schools appears in the Search Results on the left-hand side. Click on the **school** to add, and click the **Add Selected Row(s)>>** button. To add all schools, click the Add All Row(s)>> button. Multiple schools may also be selected by holding down the CTRL key.

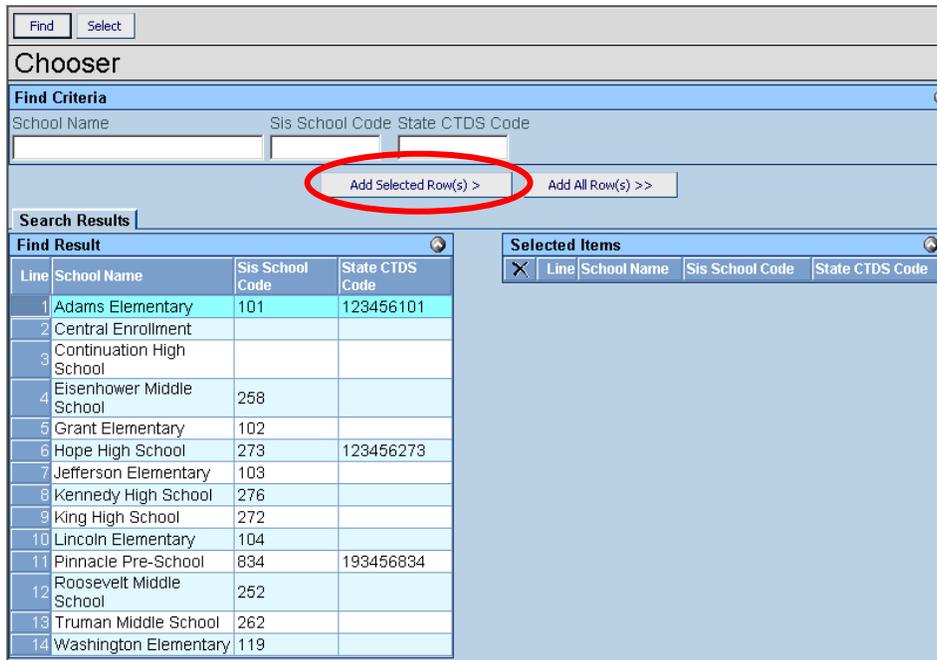


Figure 1.15 – Chooser Screen, Search Results

- Once all the desired schools are listed in the Selected Items section on the right-hand side, click the **Select** button at the top of the screen to add them to the Schools tab of the SAIS Submission Setup screen.

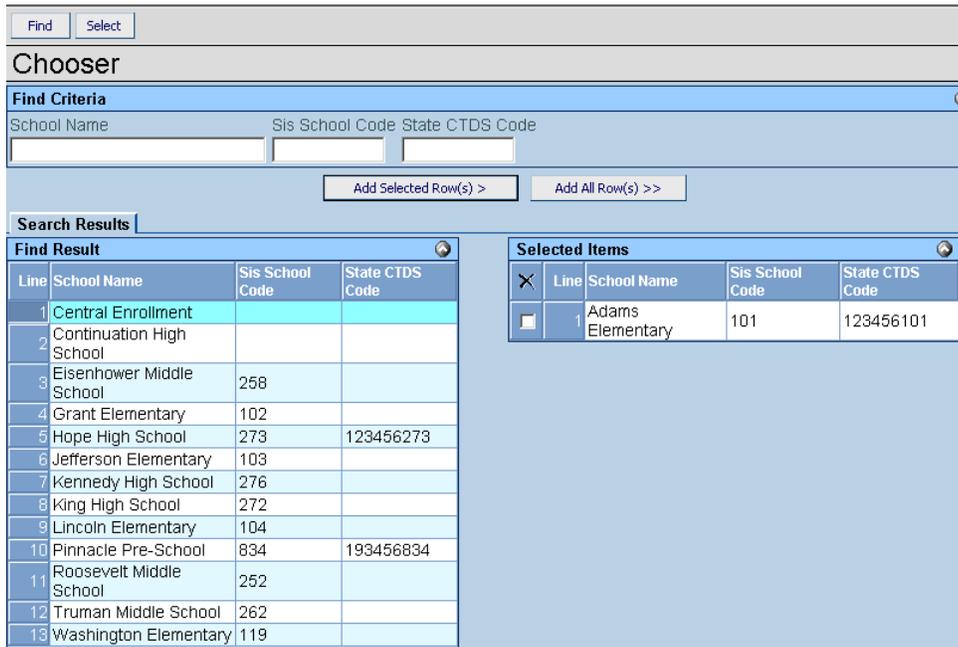


Figure 1.16 – Chooser Screen, Selected Items

- Click the **Save** button at the top of the screen to save the changes.

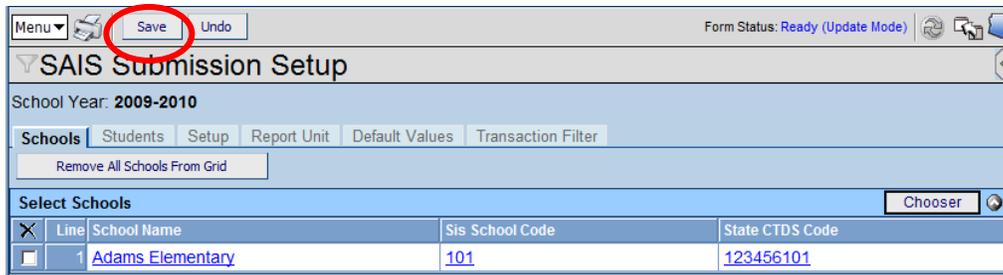


Figure 1.17 – Schools Tab, SAIS Submission Setup, Adding Schools

- To remove a school, check the box in the **X** column for the school. To remove all of the schools listed, click the **Remove All Schools From Grid** button.

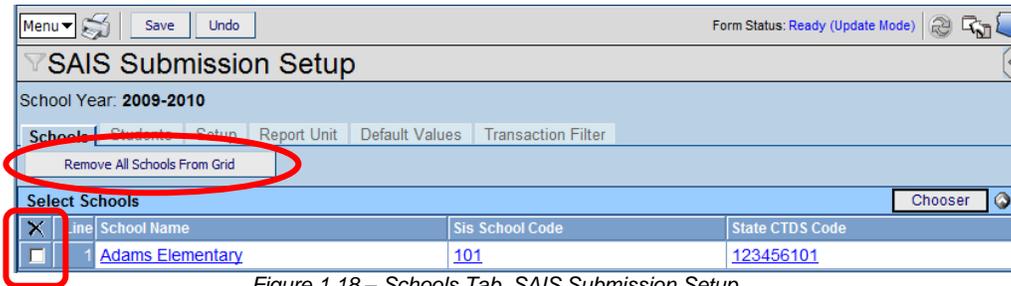


Figure 1.18 – Schools Tab, SAIS Submission Setup

- Click the **Save** button at the top of the screen to remove the school.

The submission may also be configured to only process certain students, or to exclude some students from the process. This can be helpful towards the end of the year when it may be necessary to resolve errors with just a select group of students. Since the state processes small groups of transactions more quickly, the results of the changes can be seen more quickly. To select which students are excluded or included in the submission process:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

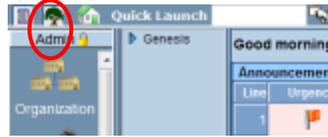


Figure 1.19 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 1.20 – Synergy SIS Folder



Figure 1.21 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 1.22 – AZ Folder

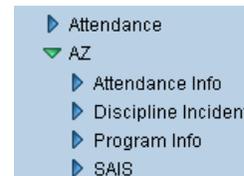


Figure 1.23 – AZ Folder Expanded

4. Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.

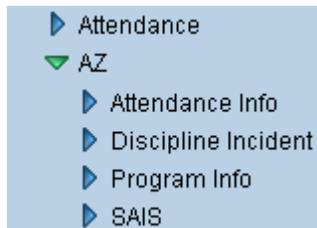


Figure 1.24 – SAIS Folder



Figure 1.25 – SAIS Folder Expanded

- Under the SAIS folder, open the **Setup** folder by clicking on the blue triangle pointing right, next to the word Setup. Once clicked, the triangle turns green and points downward.



Figure 1.26 – Setup Folder

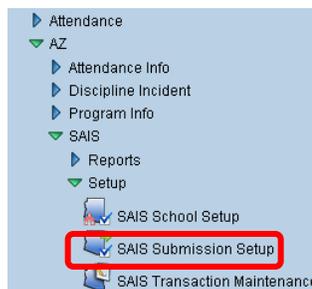
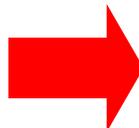


Figure 1.27 – Setup Folder Expanded

- Click on the **SAIS Submission Setup** screen, and the screen appears in the content pane on the right-side of the screen.

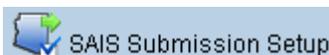


Figure 1.28 – SAIS Submission Screen Icon

- Click on the **Students** tab of the SAIS Submission Setup screen.

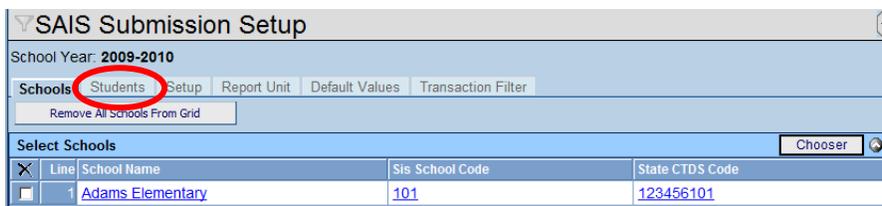


Figure 1.29 – SAIS Submission Setup Screen, Schools Tab

- To add students to be included in the submission process, click the **Chooser** button in the **Select Students to Include** section. To add students to be excluded from the submission process, click the **Chooser** button in the **Select Students to Exclude** section.

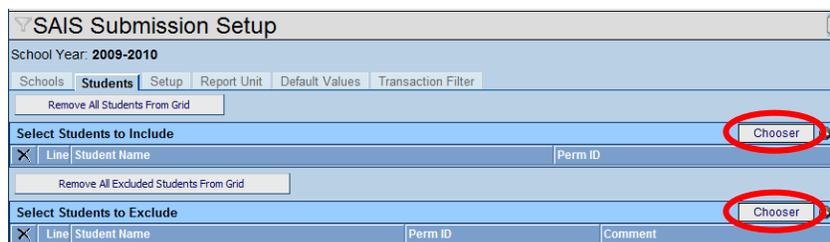


Figure 1.30 – SAIS Submission Setup Screen, Students Tab

- The Chooser screen appears. Click the **Find** button to list all students, or enter the name of the student in the Find Criteria section before clicking Find to search for a specific student.

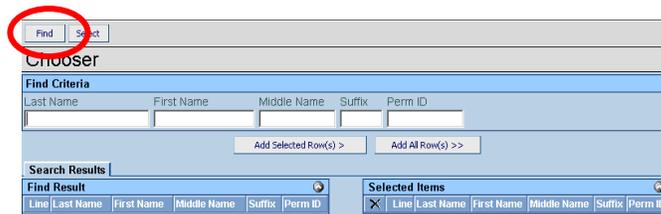


Figure 1.31 – Chooser Screen

- The list of students appears in the Search Results on the left-hand side. Click on the **student** to add, and click the **Add Selected Row(s)>>** button. To add all students listed, click the Add All Row(s)>> button. Multiple students may also be selected by holding down the CTRL key.

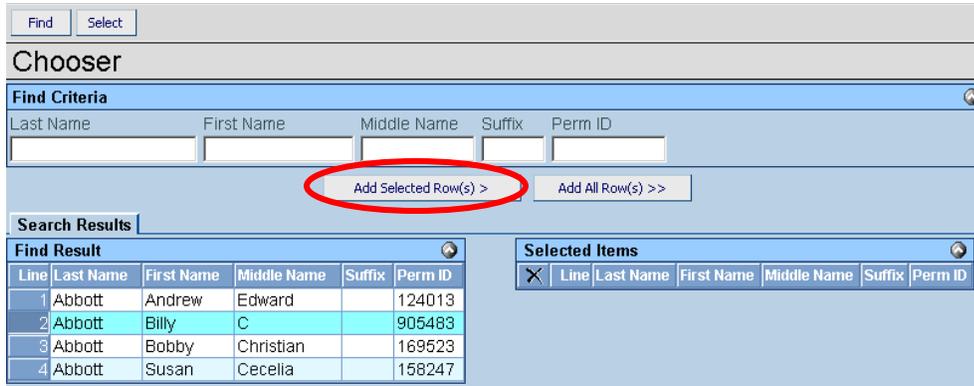


Figure 1.32 – Chooser screen, Search Results

- Once all the desired students are listed in the Selected Items section on the right-hand side, click the **Select** button at the top of the screen to add them to the Students tab of the SAIS Submission Setup screen.

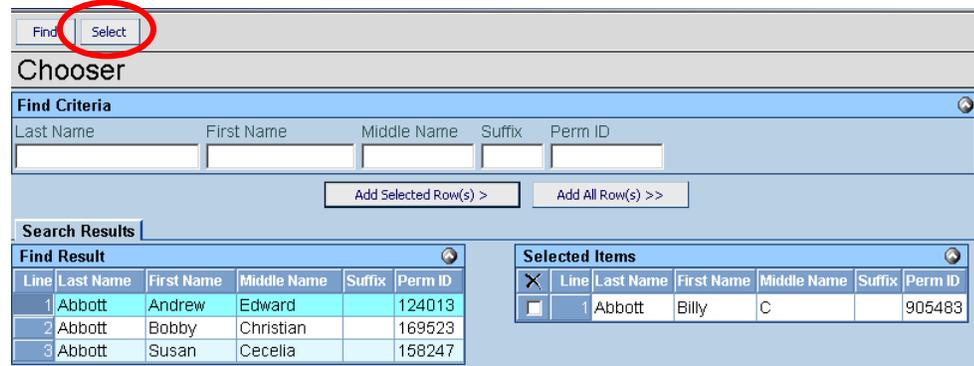


Figure 1.33 – Chooser Screen, Selected Items

- Click the **Save** button at the top of the screen to save the changes.

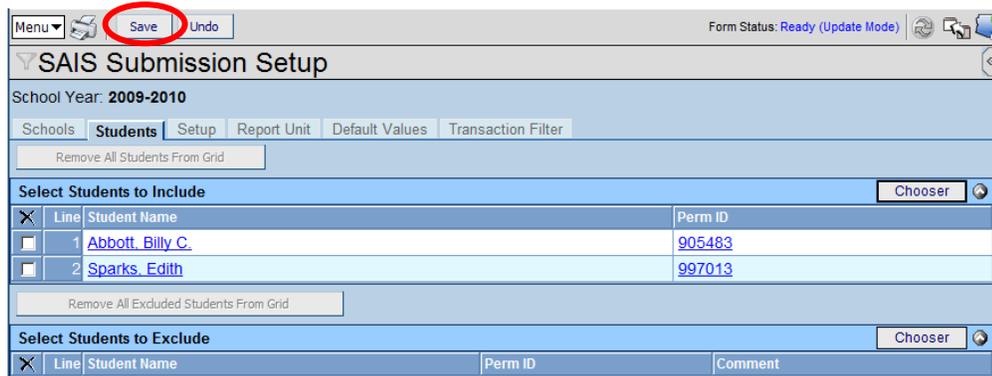


Figure 1.34 – Students Tab, SAIS Submission Setup, Adding Students

- To remove a student, check the box in the **X** column for the student. To remove all the students, click the **Remove All Students from Grid** or **Remove All Excluded Students From Grid** buttons.

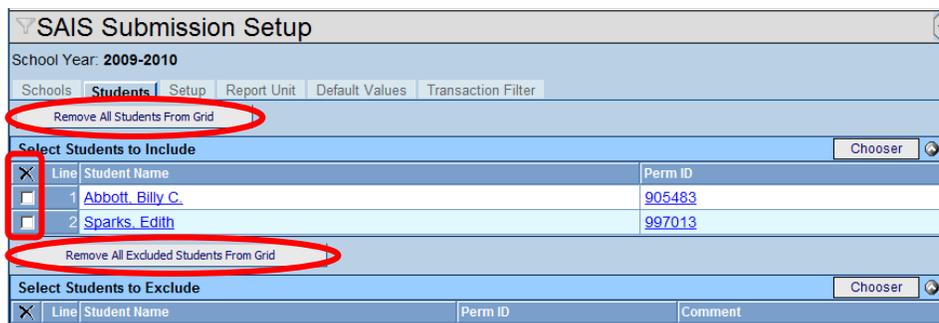


Figure 1.35 – Students Tab, SAIS Submission Setup

- Click the **Save** button at the top of the screen to remove the students.
- Next, switch to the **SAIS Submission** screen underneath the SAIS folder.



Figure 1.36 – SAIS Submission icon

- Check the box marked **Process Selected Students Only** in Step 1. This allows a group of students to stay selected as outlined above, but to only be processed separately when this checkbox is selected.

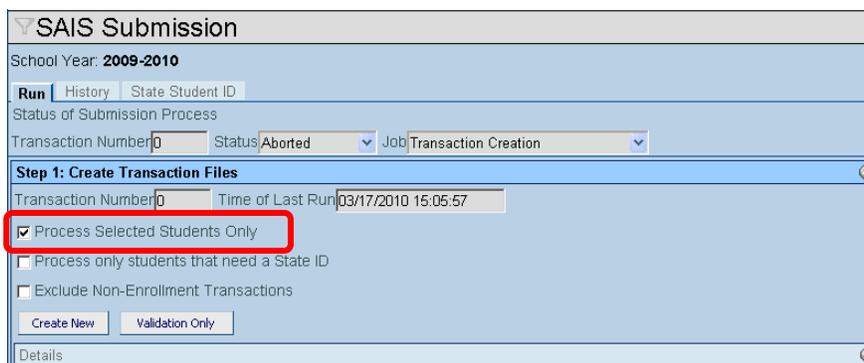


Figure 1.37 – SAIS Submission Screen, Process Selected Students Only

- Click the **Save** button at the top of the screen to save the changes. The process is ready to run for just the selected students.

# HOW TO RUN THE SUBMISSION PROCESS

After all of the selections have been made in the pre-submission setup process, the submission is ready to go. To run the submission process:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.



Figure 1.38 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 1.39 – Synergy SIS Folder

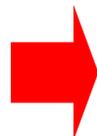


Figure 1.40 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 1.41 – AZ Folder



Figure 1.42 – AZ Folder Expanded

4. Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.

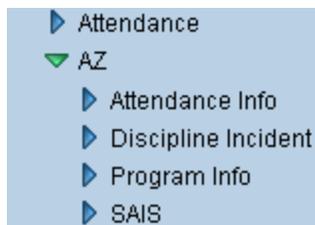


Figure 1.43 – SAIS Folder

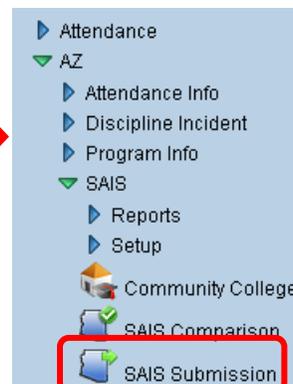


Figure 1.44 – SAIS Folder Expanded

- Click on the **SAIS Submission** screen, and the screen appears in the content pane on the right-side of the screen.
- At the very top of the Run tab of the SAIS Submission screen, the **status** of the last submission is shown. It shows the state transaction number, the status of the run (the last step completed), and the overall status of the job.

The screenshot shows the 'SAIS Submission' interface for the school year 2008-2009. It features a 'Run' tab and a 'Status of Submission Process' section. A red box highlights the 'Transaction Number' field with the value '1', the 'Status' dropdown menu with the value '4', and the 'Job' dropdown menu with the value 'Status Download'.

Figure 1.45 – SAIS Submission, Status of Submission Process

- The first step in the submission process creates the transaction file to be uploaded to the state. In the first part of step 1, select any options needed by clicking in the checkboxes in the Step 1 box. These options are:

The screenshot shows the 'SAIS Submission' interface for the school year 2009-2010. It features a 'Run' tab and a 'Step 1: Create Transaction Files' section. The 'Transaction Number' is 0 and the 'Time of Last Run' is 03/17/2010 15:05:57. The 'Process Selected Students Only' checkbox is checked, while 'Process only students that need a State ID' and 'Exclude Non-Enrollment Transactions' are unchecked. There are 'Create New' and 'Validation Only' buttons at the bottom.

Figure 1.46 – SAIS Submission Screen, Step One

- **Process Selected Students Only** – if checked, only the students selected on the Students tab of the SAIS Submission Setup screen are used to generate transactions. For more information, see the section in this chapter titled Pre-Submission Setup.
  - **Process only students that need a State ID** – if checked, only the transactions to request a state student ID for students without a state student ID are uploaded. For more information, see the section in this chapter on Downloading State Student IDs
  - **Exclude Non-Enrollment Transactions** – if checked, only enrollment-related transactions including attendance and absence records are uploaded. Transaction records for special programs such as special education will not be uploaded. This is helpful at the beginning of the year when they state may not be ready to accept transaction records for special programs.
- Click the **Save** button at the top of the screen to save the options.
  - Once the needed options have been checked, either a new file can be created to be uploaded or only the validation process can be run to check for errors. Running the validation process can be helpful to identify errors quickly and fix them before actually uploading data. Since the validation only process does not move on to step 2, there is no need to wait for the state to complete its processing before creating another transaction file. To create a file to be uploaded, click the **Create New** button. To only run the validation process, click the **Validation Only** button.

**Note:** The **Create New** and **Validation Only** buttons run the exact same process. The only difference is that the Validation Only button does not create a file to be uploaded. Both buttons check all of the data in Synergy SIS to be sent to the state for errors, and compile a report of those errors. However, even if the Create New button has been used, the process may always be cancelled before the file is uploaded by clicking the Cancel Submission button in Step 2.

At the beginning of each school year, the **Validation Only** and **Process State ID** options are the only processes available until the annual Synergy SIS software upgrade is released with the new changes required by the state. This is to ensure that the data submitted is compliant with any new state requirements for the new school year.



This is also explained on the screen in the **Details** box. When expanded, the Details box in each section outlines what happens and the options available for each step in the process.

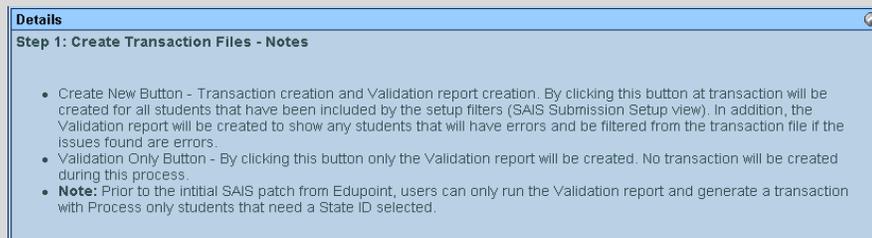


Figure 1.47 – Step 1 Details

10. Regardless of whether or not a new submission is created or a validation is selected, when step 1 is complete a report will pop-up on the screen in PDF format. This report, the **SAIS-01 report**, lists any errors or warnings encountered as part of the Synergy SIS validation process. This is different than the SAIS-02 report from step 3, which shows the errors from the state of Arizona's validation process.
11. Throughout the process, when a step is completed the options and buttons for that step are locked down and only the options on the next step are available. However, the screen does not automatically display this changed. Click the **Refresh** button at the top of the screen to display the step changes.

Figure 1.48 – SAIS Submission Screen, Refresh Button

12. **Step 2** of the submission process uploads transaction files to the state. In the Step 2 section, it shows the total number of files created in step 1, number of files waiting to be uploaded, the number of file upload errors (if any errors occurred during the upload process), validation errors (the number of errors found during the Synergy SIS validation process), and validation warnings (the number of warning found during the Synergy SIS validation process). Transactions with errors are not uploaded, but transactions with warnings display potential problems but still upload.

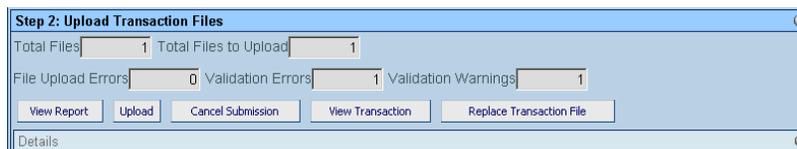


Figure 1.49 – SAIS Submission Screen, Step 2

13. If the SAIS-01 report that popped-up after Step 1 has been closed, it can be seen again by clicking the **Screen Report** button in Step 2. To see the actual file that will be uploaded to the state, click the **Screen Transaction** button. If the transaction file is larger than 10M, only the first transaction file is displayed. The additional transaction files can be seen from the History tab.
14. The **Replace Transaction File** button substitutes another file for the file ready for upload. This should only be used when directed by the Edupoint support staff.
15. To send the file to the state, click the **Upload** button. To cancel the process and start over, click the **Cancel Submission** button.
16. Once the file is uploaded, the state of Arizona must finish processing the uploaded file before moving on to Step 3. Be sure to check the schedule for the SAIS system to see when the SAIS system will be offline. When SAIS is offline, files cannot be uploaded or downloaded.
17. Don't forget to click the **Refresh** button between steps!

18. **Step 3** downloads the results of the state validation process for the file uploaded in Step 2. Click the Download button to get the file from the SAIS system. If the file is not ready yet, the process will stay in step 3.

The screenshot shows the SAIS Submission interface. At the top, it displays 'SAIS Submission' and 'School Year: 2009-2010'. Below this, there are tabs for 'Run', 'History', and 'State Student ID'. The 'Status of Submission Process' section shows 'Transaction Number: 1', 'Status: Completed', and 'Job: File Upload'. The main area is divided into four steps:

- Step 1: Create Transaction Files**: Includes fields for Transaction Number (1) and Time of Last Run (04/23/2010 11:49:50). There are checkboxes for 'Process Selected Students Only' (checked), 'Process only students that need a State ID', and 'Exclude Non-Enrollment Transactions'. Buttons for 'Create New' and 'Validation Only' are present.
- Step 2: Upload Transaction Files**: Shows 'Total Files: 1' and 'Total Files to Upload: 0'. It also displays 'File Upload Errors: 0', 'Validation Errors: 1', and 'Validation Warnings: 1'. Buttons include 'View Report', 'Upload', 'Cancel Submission', 'View Transaction', and 'Replace Transaction File'.
- Step 3: Download Transaction Status Data**: This section is highlighted with a red box. It shows 'Total Files to Download: 1' and 'Total Files Rejected: 0'. A 'Download' button is located below these fields.
- Step 4: Process Status Data (Synchronize with state SAIS database)**: Shows 'Total Files to Analyze: 0' and buttons for 'View Transaction Results' and 'Process Status Data'.

At the bottom, there is a table titled 'Transaction Files Created in Last Run':

Line	Run Seq	State Trans Num	File		Upload			Download			Result Analyzed
			Report Unit	Detail	Upload Time	Upload Status	Upload Status Description	Download Time	Download Status	Download Status Description	
1	1	2009-0001			04/23/2010 11:53:53	OK	File 2010.1.1.sdf successfully uploaded. (Bypassed)		Not Available		<input type="checkbox"/>

Figure 1.50 – SAIS Submission Screen, Step 3

19. Once the file is downloaded, step 3 will show the total number of files downloaded, and the number of files rejected at the state.
20. When the file is downloaded, a report will pop-up on the screen in PDF format. This report, the **SAIS-02 report**, lists any errors or warnings encountered as part of the state of Arizona’s validation process. This is different than the SAIS-01 report from step 1, which shows the errors from the Synergy SIS validation process.
21. To move on to step 4 immediately, click the **Refresh** button at the top of the screen.

This screenshot shows the same SAIS Submission interface as Figure 1.50. At the top right, there is a 'Form Status: Ready (Update Mode)' label and a circular 'Refresh' button with a circular arrow icon, which is circled in red. The rest of the interface, including the steps and the table, is identical to the previous screenshot.

Figure 1.51 – SAIS Submission Screen, Refresh Button

22. Step 4 will process the data downloaded from the SAIS system. This step is critical as it synchronizes the data between the SAIS database and Synergy SIS. The total number of files that need to be processed is displayed in step 4. To run the analysis, click the **Process Status Data** button

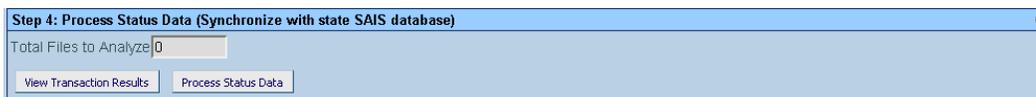


Figure 1.52 – SAIS Submission Screen, Step 4

23. If the SAIS-02 report that popped-up at the end of Step 3 has been closed, it can be seen again by clicking the **Screen Transaction Results** button.
24. At the very bottom of the SAIS Submission screen, the overall status of the submission process is displayed as the steps are completed. The first section of the status line displays the Run Sequence number that tracks the submission in Synergy SIS.

Transaction Files Created in Last Run												
Line	Run Seq	File			Upload			Download			Result Analyzed	
		State Trans Num	Report Unit	Detail	Upload Time	Upload Status	Upload Status Description	Download Time	Download Status	Download Status Description		
1	1	2009-0001			05/29/2009 10:44:00	OK	File 2009.1.1.sdf successfully uploaded.	05/29/2009 10:45:11	Not Available		<input type="checkbox"/>	

Figure 1.53 – SAIS Submission Screen, Transaction Status

25. The **File section** (the status of Step 1) displays the State Transaction Number, and the report unit used in the file. To see the actual file uploaded to the state, click the magnifying glass in the Detail column.

Transaction Files Created in Last Run												
Line	Run Seq	File			Upload			Download			Result Analyzed	
		State Trans Num	Report Unit	Detail	Upload Time	Upload Status	Upload Status Description	Download Time	Download Status	Download Status Description		
1	1	2009-0001			05/29/2009 10:44:00	OK	File 2009.1.1.sdf successfully uploaded.	05/29/2009 10:45:11	Not Available		<input type="checkbox"/>	

Figure 1.54 – SAIS Submission Screen, Transaction Status

26. The **Upload section** (the status of Step 2) shows the time and date the file was uploaded, the name of the file, and whether or not the file uploaded successfully.

Transaction Files Created in Last Run												
Line	Run Seq	File			Upload			Download			Result Analyzed	
		State Trans Num	Report Unit	Detail	Upload Time	Upload Status	Upload Status Description	Download Time	Download Status	Download Status Description		
1	1	2009-0001			05/29/2009 10:44:00	OK	File 2009.1.1.sdf successfully uploaded.	05/29/2009 10:45:11	Not Available		<input type="checkbox"/>	

Figure 1.55 – SAIS Submission Screen, Transaction Status

27. The **Download** (the status of Step 3) section shows the last date and time the download process was run and the status of the download. When step 4 is completed, the Result Analyzed box is checked.

Transaction Files Created in Last Run												
Line	Run Seq	File			Upload			Download			Result Analyzed	
		State Trans Num	Report Unit	Detail	Upload Time	Upload Status	Upload Status Description	Download Time	Download Status	Download Status Description		
1	1	2009-0001			05/29/2009 10:44:00	OK	File 2009.1.1.sdf successfully uploaded.	05/29/2009 10:45:11	Not Available		<input type="checkbox"/>	

Figure 1.56 – SAIS Submission Screen, Transaction Status

## POST-SUBMISSION ERROR CORRECTION

After each submission, be sure to rescreen the SAIS01 and SAIS02 reports for errors, and try to correct the errors prior to the next submission. The **SAIS-01** report normally appears after step one of the SAIS submission process. This report lists any errors or warnings found in the data in Synergy SIS during the **Synergy SIS validation process**. The first page of the report displays a summary of the number of errors and warnings found at each school, and the number of students that were not include in the submission because of the errors. Subsequent pages show each error and warning in detail so they can be corrected. This report can also be run separately from the submission process by following the instructions in Chapter 11.

Sample School District						Year: 2005-2006
Transaction Creation and Data Validation						Report: SAIS-01
Summary by School						Run#: 40
Total Students	Excluded Students	Errors	Warnings	Setup Errors	Setup Warnings	Elementary School
3	3	3	0	0	0	
3	3	3	0	0	0	
Start Time: 09/15/2006 10:18:25 End Time: 09/15/2006 10:19:02 Total Files: 0						

Figure 1.57 – SAIS-01 Report, Summary Page

Sample School District						Year: 2005-2006
Transaction Creation and Data Validation						Report: SAIS-01
Validation Results						Run#: 40
Legend: E - Error, W - Warning						
Garcia Elementary School					Elementary School	
Name: Madeno, Cristian	Pern ID: 4462	DOB: 03/09/2000				
E STU003	Normal Graduation Year Missing. Years Until Graduation may need to be setup in District Setup. (Record 'PersonalInfo', Field 'NormalGraduationYear', Value '')					
Name: Razo, Alexis	Pern ID: 3466	DOB: 09/07/1999				
E STU003	Normal Graduation Year Missing. Years Until Graduation may need to be setup in District Setup. (Record 'PersonalInfo', Field 'NormalGraduationYear', Value '')					
Name: Rivera, Zaul C.	Pern ID: 5454	DOB: 07/31/2000				
E STU003	Normal Graduation Year Missing. Years Until Graduation may need to be setup in District Setup. (Record 'PersonalInfo', Field 'NormalGraduationYear', Value '')					

Figure 1.58 – SAIS-01 Report, Error Page

The most common errors that occur during the Synergy SIS validation process are due to missing information such as date of birth, state, graduation year. Most of these errors can be fixed on the Student screen by entering the missing data.

The **SAIS-02** report normally appears after step three of the SAIS submission process. This report lists any errors or warning found in the data in Synergy SIS during the **state of Arizona validation process**. The first page of the report displays a summary of the number of errors and warnings found at each school, and the number of students that were not include in the submission because of the errors. Subsequent pages show each error and warning in detail so they can be corrected.

The difference between this report and the SAIS-01 report is that the 01 report shows errors after the Synergy SIS validation process where the 02 reports shows the errors after the state of Arizona validation process. Synergy SIS can only validate the data itself, where the state of Arizona's process compares the data against other schools' information and the data already uploaded to the SAIS system. Both sets of errors need to be corrected.

SSD		Sample School District			Year: 2005-2006	
		Transaction Status			Report: SAIS-02	
		SAIS System Messages			Run#: 35	
Summary by School		Total Records	Rejected Records	Errors	Warnings	SAIS System Errors
Garcia Elementary School		2	1	1	0	0
Hamitce Elementary School		0	0	0	0	0
William Elementary School		0	0	0	0	0
Sullivan Elementary School		0	0	0	0	0
		2	1	1	0	0
Transaction Creation Start Time: 09/29/2005 17:15:25		Transaction Creation End Time: 09/29/2005 17:17:35				

Figure 1.59 – SAIS-02 Report, Summary Page

SSD		Sample School District			Year: 2005-2007	
		Transaction Status			Report: SAIS-02	
		SAIS System Messages			Run#: 22	
Record #	Error Type	Error Code	Warnings		Severity	
			Garcia Elementary School		Elementary School	
			070421070			
			Name: Doe J		Perm ID: 4477	
0	1	-211012	SAIS will not populate the normal graduation year; Grade not in high school; GradeLevelCode=3		0	

Figure 1.60 – SAIS-02 Report, Error Page

Common errors that occur during the state of Arizona's validation process:

- **Mismatched calendar dates** – if the calendar entered into SAIS does not match the calendar in Synergy SIS, errors will be generated. Make sure these calendars match.
- **Incorrect date of birth or gender** – if another school uploaded the student previously with incorrect information, the state will reject the upload of the student's membership information. To correct this:
  1. Change the student data to match the incorrect data at the state.
  2. Upload the incorrect data to the state.
  3. Once the student has been successfully uploaded, change the data back to the correct information.
  4. Upload the corrected information.
- **Incorrect SAIS ID** – if an incorrect SAIS ID was downloaded and assigned to a student through the SAIS Submission process, the student's SAIS data can be reset and uploaded again with the correct number by:
  1. Go to the **SAIS Online** website, and delete the student's enrollment record.
  2. In Synergy SIS, go to the **Student** screen and set the SAIS ID to the correct ID.
  3. In Synergy SIS, go to the **SAIS Transaction Maintenance** screen, found under Synergy SIS > AZ > Setup.
  4. Enter either the student's **SIS Number** or **SAIS Number**, and click the **Load Student** button.
  5. Click on the **Show Detail** button once the record is loaded.
  6. Delete all information from the **Snapshot** box.
  7. Uncheck the **Submitted State ID** checkbox.
  8. Click the **Save** button.

Be sure to correct all of the errors listed in both reports before creating another submission, or the same errors will be repeated in the reports.

Occasionally, the information in Synergy SIS will get “out of sync” with the information uploaded to the state. Synergy SIS maintains a file known as a snapshot that shows what Synergy SIS records as having been uploaded to the state. Since the data in Synergy SIS is constantly changing as new students are added or student data is changed, this snapshot records all of the data that was present on the date and time of the last upload to the state.

During the transaction creation process, Synergy SIS uses these snapshots to determine what data changes have occurred since the last upload by comparing the data in the snapshot against what is currently in Synergy SIS, and then creates transactions to change the data at the state to match what is now in Synergy SIS.

If something catastrophic occurs, such as the accidental deletion of a snapshot or an unusual change in the critical student identifiers used by the state or a manual change to the data at the state was made through the SAIS Online system, the snapshot may not match what is actually recorded at the state. To correct this problem and get Synergy SIS back “in sync” with the data at the state, it may be necessary to manually adjust the snapshot.



**Caution:** These procedures outlined below can cause major problems with the data upload to the state if done incorrectly. Only expert users should have access to the SAIS Transaction Maintenance screen, and all changes should be worked out with the Edupoint support team in advance.

To manually adjust the Synergy SIS snapshot:

1. Go to the **SAIS Transaction Maintenance** screen, found under Synergy SIS > SAIS > Setup.

Figure 1.61 – SAIS Transaction Maintenance Screen

2. To lookup an individual student’s records, enter either the student’s Perm ID (from the Student screen) in the **SIS Number** box or enter the student’s SAIS ID (from the Student screen) in the **SAIS Number** box.
3. Click the **Load Student** button, and the student’s records appear in the grid below.

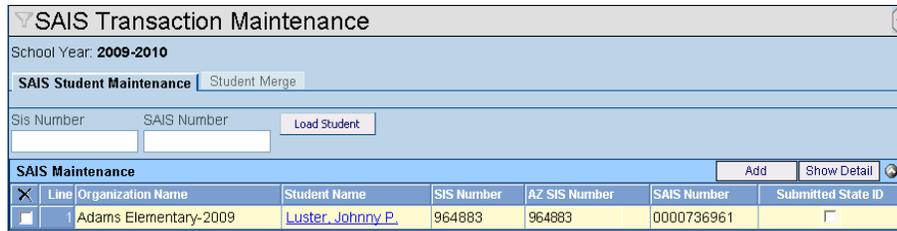


Figure 1.62 – SAIS Transaction Maintenance Screen, Student Data Loaded

4. For each student, the following information is listed:
  - **Organization Name** – the name of the student’s school followed by the school year. A separate record is listed for each school and year.
  - **Student Name** – the student’s name. When the student’s name is clicked, the Student screen pops-up in a separate window to show the student’s information.
  - **SIS Number** – the student’s Perm ID as listed in the Perm ID field on the student screen.
  - **AZ SIS Number** – the student’s Perm ID as submitted to the state by Synergy SIS. If the student’s Perm ID has been changed since the data was last uploaded to the state, this number may be different than the one in the SIS Number field.
  - **SAIS Number** – the student’s SAIS ID as listed in the SAIS ID field on the student screen
  - **Submitted State ID** – if the student does not have a SAIS ID and a request has been submitted to the state to have a SAIS ID generated for the student, this box is checked. If the request has been “lost” by the state, a new request can be generated by un-checking this box. The new request then submitted to the state through the next upload.
5. To screen all of the information for the student contained in the snapshot, click the **Show Detail** button.

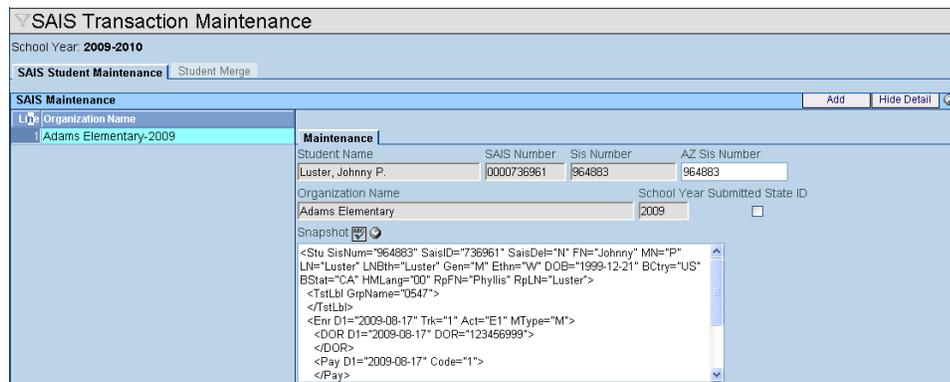


Figure 1.63 – SAIS Transaction Maintenance Screen, Detailed Screen

6. The snapshot is displayed in XML format in the Snapshot box. This data should only be edited in consultation with the Edupoint support team. The XML shows a data field name followed by the current value of the data in quotation marks. Some of the XML data fields commonly contained in the snapshot are:
  - **Stu SISNum** – the Perm ID
  - **SaisID** – the SAIS ID

- **SaisDel** – a flag indicating Y/N if the record should be deleted
  - **FN** – the student’s first name
  - **MN** – the student’s middle initial
  - **LN** – the student’s last name
  - **LNBth** – the last name the student was born with
  - **Gen** – the state code for the student’s gender
  - **Ethn** – the state code for the student’s ethnicity
  - **DOB** – the student’s date of birth
  - **BCtry** – the student’s birth country
  - **BState** – the student’s birth state
  - **HMLang** – the student’s home language
  - **RpFN** – the first name of the “responsible party”, or the first name of the student’s parent or guardian selected for upload
  - **RpLN** – the last name of the “responsible party”, or the first name of the student’s parent or guardian selected for upload
  - **TstLbl GrpName** – the section ID of the section selected for test label generation
  - **Enr D1** – the enter date of the student’s first enrollment for the school year
  - **Trk** – the track number
  - **Act** – the enter code of the student’s enrollment
  - **MType** – the state code for the student’s membership type
  - **DOR D1 & DOR** – the enter date and CTD number
  - **Pay D1 & Code** – the enter date and Tuition Payer Code
  - **Grd D1** – the enter date for the grade
  - **Grd** – the student’s grade level
  - **RegID** – the register ID number
  - **FTE D1 & FTE** – the enter date and FTE value
7. If the student has duplicate records in Synergy SIS, the duplicate record must be corrected at the state as well as in Synergy SIS. To merge the snapshots of two student records, click on the **Student Merge** tab of the SAIS Transaction Maintenance screen.

**SAIS Transaction Maintenance**

School Year: **2008-2009**

SAIS Student Maintenance | **Student Merge**

**Primary Snapshot**

Primary SIS Number Primary SAIS Number Find Primary Snapshot Save Primary Snapshot Clear Primary Properties

Primary Snapshot

Figure 1.64 – Student Merge Tab, SAIS Transaction Maintenance Screen

8. The Student Merge tab is divided into three sections. The top section is the **Primary Snapshot**, which displays the snapshot of the student that will be kept in Synergy SIS. To load the student snapshot, enter either the student's Perm ID (from the Student screen) in the **Primary SIS Number** box or enter the student's SAIS ID (from the Student screen) in the **Primary SAIS Number** box, and then click the **Find Primary Snapshot** button.

The screenshot shows the 'SAIS Transaction Maintenance' window with the 'Student Merge' tab selected. Under the 'Primary Snapshot' section, there are two input fields: 'Primary SIS Number' containing '964883' and an empty 'Primary SAIS Number' field. To the right are three buttons: 'Find Primary Snapshot', 'Save Primary Snapshot', and 'Clear Primary Properties'. Below these is a scrollable text area displaying XML data for a student snapshot.

```
<Stu SisNum="964883" SaisID="736961" SaisDel="N" FN="Johnny" MN="P" LN="Luster" LNBth="Luster" Gen="M"
Ethn="W" DOB="1999-12-21" BCtry="US" BStat="CA" HMLang="00" RpFN="Phyllis" RpLN="Luster">
<TstLbl GrpName="0547">
</TstLbl>
<Enr D1="2009-08-17" Trk="1" Act="E1" MType="M">
<DOR D1="2009-08-17" DOR="123456999">
</DOR>
<Pay D1="2009-08-17" Code="1">
</Pay>
<Grd D1="2009-08-17" Grd="5" RegID="1">
```

Figure 1.65 – Student Merge Tab, SAIS Transaction Maintenance Screen

9. The snapshot is displayed in XML format in the Snapshot box. This data should only be edited in consultation with the Edupoint support team. To save the changes to the XML, click the **Save Primary Snapshot** button. To remove the primary snapshot data from the screen (but not from the snapshot itself), click the **Clear Primary Properties** button.
10. The middle section is the **Additional Snapshot**, which shows the data for the student record that will be removed. To load the student snapshot, enter either the student's Perm ID (from the Student screen) in the **Primary SIS Number** box or enter the student's SAIS ID (from the Student screen) in the **Primary SAIS Number** box, and then click the **Find Additional Snapshot** button.

The screenshot shows the 'Additional Snapshot' section of the 'SAIS Transaction Maintenance' window. It features two input fields: 'SIS Number' containing '964883' and an empty 'SAIS Number' field. To the right are three buttons: 'Find Additional Snapshot', 'Save Additional Snapshot', and 'Clear Additional Properties'. Below these is a scrollable text area displaying XML data for an additional student snapshot.

```
<Stu SisNum="964883" SaisID="736961" SaisDel="N" FN="Johnny" MN="P" LN="Luster" LNBth="Luster" Gen="M"
Ethn="W" DOB="1999-12-21" BCtry="US" BStat="CA" HMLang="00" RpFN="Phyllis" RpLN="Luster">
<TstLbl GrpName="0547">
</TstLbl>
<Enr D1="2009-08-17" Trk="1" Act="E1" MType="M">
<DOR D1="2009-08-17" DOR="123456999">
</DOR>
<Pay D1="2009-08-17" Code="1">
</Pay>
<Grd D1="2009-08-17" Grd="5" RegID="1">
```

Figure 1.66 – SAIS Transaction Maintenance Screen, Student Merge Tab, Additional Snapshot

11. The snapshot is again displayed in XML format in the Snapshot box. This data should only be edited in consultation with the Edupoint support team. To save the changes to the XML, click the **Save Additional Snapshot** button. To remove the primary snapshot data from the screen (but not from the snapshot itself), click the **Clear Additional Properties** button.

12. The last section is the **Merged Snapshot**, which will display the results of combining the snapshots displayed in the Primary and Additional Snapshot boxes. To merge the data, click the **Merge Snapshot** button.

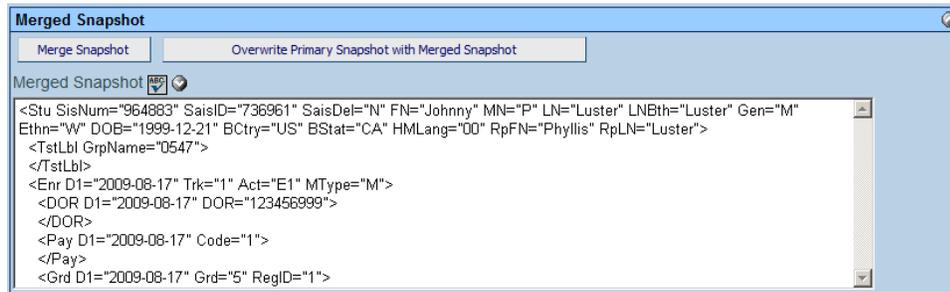


Figure 1.67 – SAIS Transaction Maintenance Screen, Student Merge Tab, Merged Snapshot

13. After the snapshots have been merged, the merged snapshot can be edited to ensure the merged data is combined correctly. Once everything is corrected, the merged snapshot can be saved as the primary snapshot by clicking the **Overwrite Primary Snapshot with Merged Snapshot**. **THIS CANNOT BE UNDONE**, so be sure the data is correct before clicking this button!!

## DOWNLOADING STATE STUDENT IDs

When a student is entered into Synergy SIS without a State Student ID and the enter code is an E3 or E6, the student is uploaded to the state with a request that a State Student ID be created for the student. The SAIS system double-checks to ensure an ID does not already exist for this student, and if not, creates the ID. Synergy SIS then downloads the created ID and enters it into the student's record.

The requests for a State Student ID are automatically included in any submission uploaded to the state, but they can also be processed separately. This can be helpful at the beginning of the year. To upload only those students requiring a state ID:

1. On the SAIS Submission screen in Step 1, check the box labeled **Process only students that need a State ID**.

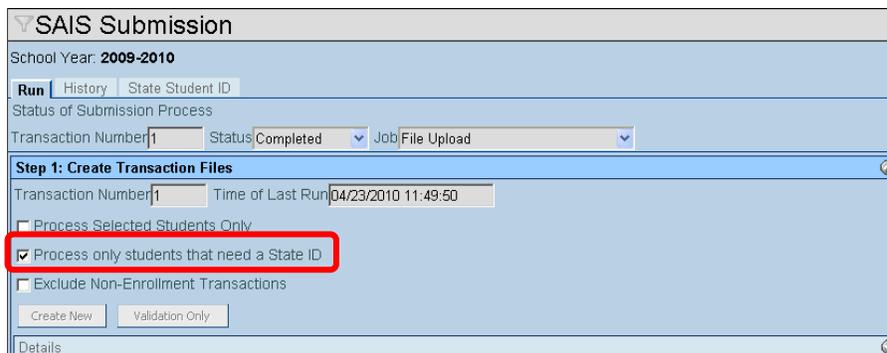


Figure 1.68 – SAIS Submission Screen, Processing Student IDs

2. Click the **Save** button at the top of the screen to save the changes.
3. Run the submission process as outlined in the section How to Run the Submission Process in this chapter.

To screen which students have been uploaded to the state requesting an ID:

1. Click on the **State Student ID** tab of the SAIS Submission screen.

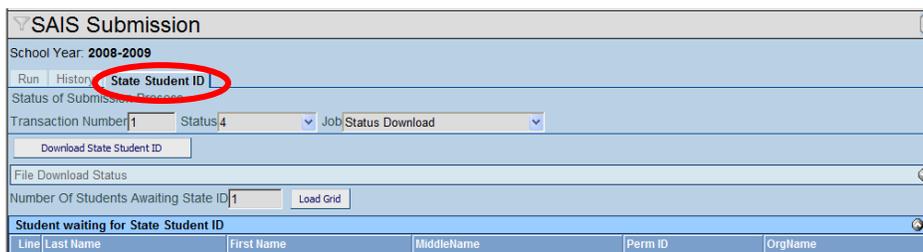


Figure 1.69 – State Student ID tab of the SAIS Submission Screen

2. Click the button labeled **Load Grid**. The students waiting for an ID are listed below. Note that it also lists how many students are waiting for a State ID.



Figure 1.70 – State Student ID tab, SAIS Submission Screen, Load Grid

Since the state does not notify the districts when the state student IDs have been created, it is necessary to periodically check to see if the IDs are ready. To check to see if the IDs have been created and download them to Synergy SIS:

1. Click on the **State Student ID** tab of the SAIS Submission Screen.

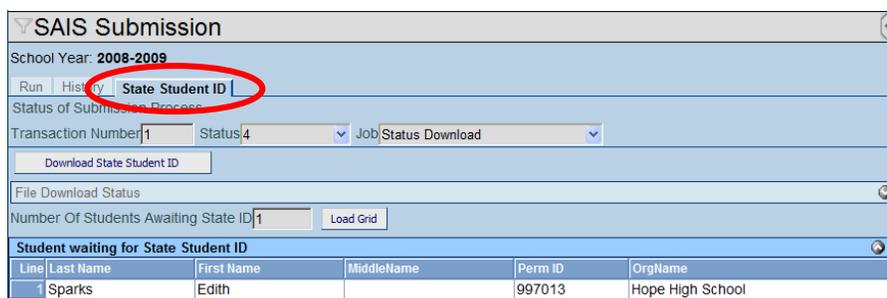


Figure 1.71 – State Student ID tab, SAIS Submission Screen

2. Click on the **Download State Student ID** button.

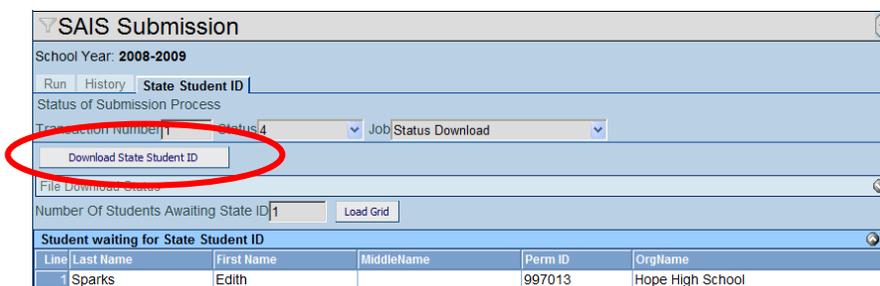


Figure 1.72 – State Student ID tab, SAIS Submission Screen, Download State Student ID Button

- If the IDs are ready, they are downloaded and entered into the student’s record. To check on the status of the download, expand the **File Download Status** area by clicking on the  button.

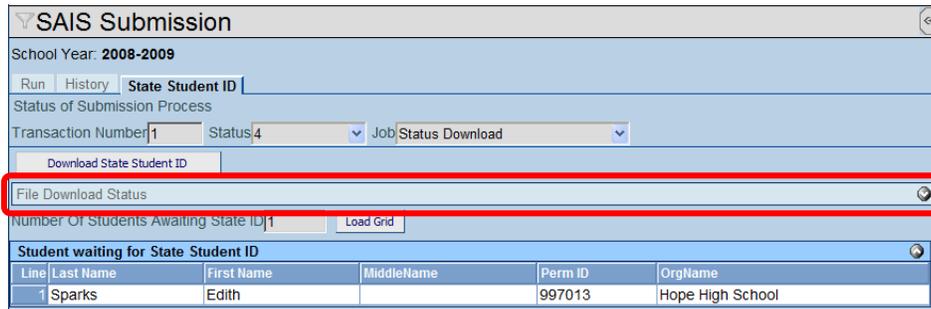


Figure 1.73 – State Student ID tab, File Download Status

- The status area displays the status of the latest attempt to download the IDs, and the date and time. If there were any errors, they are displayed as well.

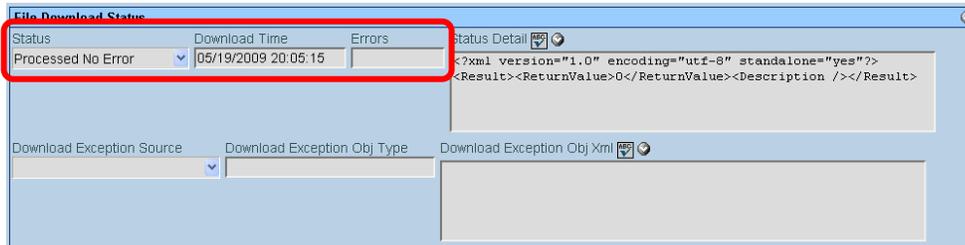


Figure 1.74 – State Student ID tab, File Download Status Expanded

## AUTOMATING THE SUBMISSION PROCESS

Once the submission process is running smoothly, it may be automated so that Synergy SIS will automatically run all four steps of the submission process. It would still be necessary to check the reports for errors. To automate the submission process:

- On the **SAIS Submission Setup** screen, click on the **Setup** tab.

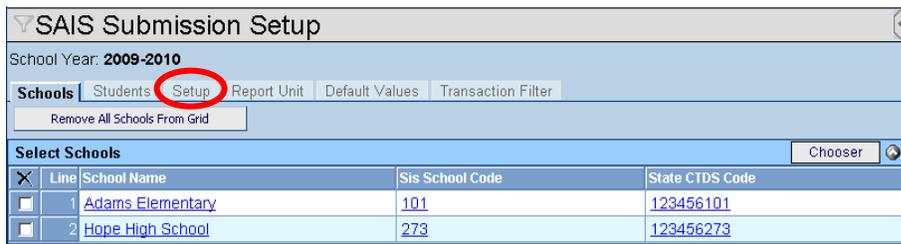


Figure 1.75 – SAIS Submission Setup Screen

2. Scroll to the bottom of the screen, and enter the **Number of Days Before Process Restarts**. For example, if 2 is entered the submission process will run every 2 days.

The screenshot shows the 'SAIS Submission Setup' window for the school year 2011-2012. The 'Setup' tab is selected. The 'Auto Processing' section is highlighted with a red box and contains the following fields:

- Number of Days Before Process Restarts**: A text input field.
- Run SAIS Process Automatically**: A checkbox.

Figure 1.76 – SAIS Submission Screen

9. Check the box labeled **Run SAIS Process Automatically** to turn on the automatic scheduled submission.
3. Click the **Save** button at the top of the screen.

Since the error reports won't pop-up on the screen, they will have to be retrieved from the **History** tab of the **SAIS Submission** screen. The two reports that should be rescreened are the SAIS-01 and the SAIS-02 reports. To retrieve these reports, please see the following section on Rescreening Transaction History.

When the submission process has been automated, the steps will run as follows:

- Step #1 will run as scheduled every selected number of days.
- Step #2 will run immediately after Step #1 has finished.
- Step #3 will run 60 minutes after the completion of Step #2. If the download is not available from the state after 60 minutes, Step #3 will run every 60 minutes until the file is available and the step is complete.
- Step #4 will run immediately after Step #3 has finished.

Each step is scheduled through the RT Process Server, and can be screened in the Job Queue Screener. If the RT Process Server is not running, the steps in queue will not be processed until the process server is turned back on. Each step creates and schedules the next step in the process server when the step is completed. In other words, step 1 creates step 2 when step 1 is completed; step 2 creates step 3 when step 2 is completed; etc.

Even with automation enabled, the schedule can always be overridden by using the buttons in the SAIS Submission screen to accelerate the process. For example, if there is still 40 minutes before the file will be downloaded, the download button can be clicked to download the file immediately. The scheduled job will be deleted and the download will be run immediately.

# RESCREENING TRANSACTION HISTORY

A list of every submission ever run is available on the History tab of the SAIS Submission screen. It includes cancelled jobs as well as validation only jobs.

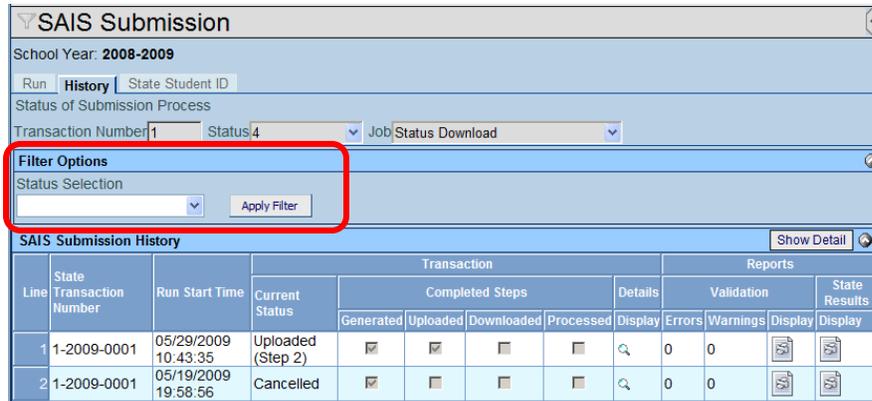


Figure 1.77 – History tab of the SAIS Submission Screen

To filter the submissions by their status, select the status to screen from the **Status Selection** drop-down and click **Apply Filter**. Each submission displays the state transaction number (or report unit), the last time a step in the submission was run, and the current status of the submission. Each of the 4 steps is checked off as it is completed, and the total number of validation warnings and errors is displayed.

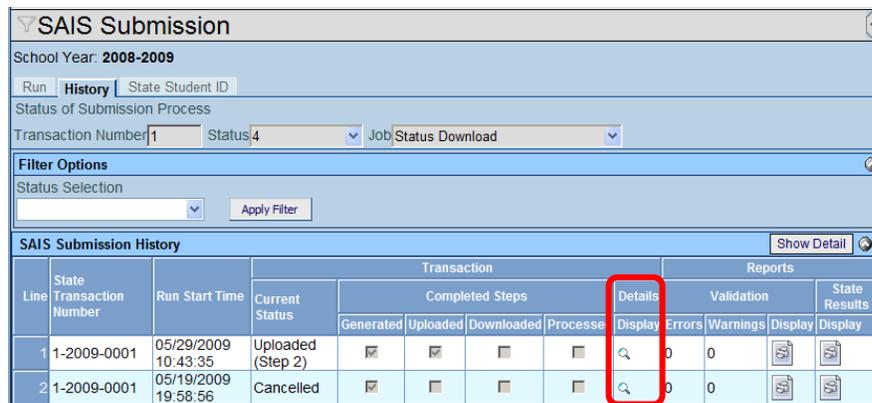


Figure 1.78 – History Tab of the SAIS Submission Screen

To display the actual file submitted to the state for each submission, click the **magnifying glass** in the Details Display column.

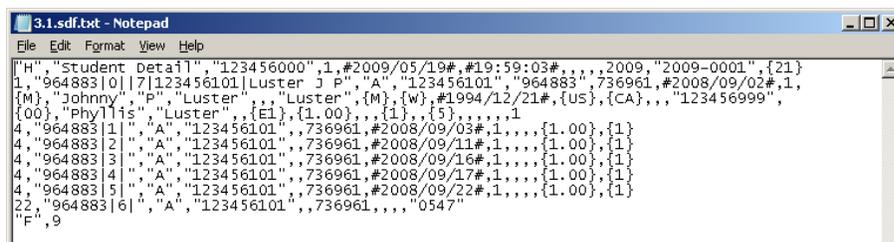


Figure 1.79 – SAIS Transaction File

The **SAIS-01** Report from Step 1 of the submission process may be displayed by clicking on the icon in the Display column in the Validation section. The **SAIS-02** Report from Step 3 may be displayed by clicking on the icon in the Display column in the State Results section.

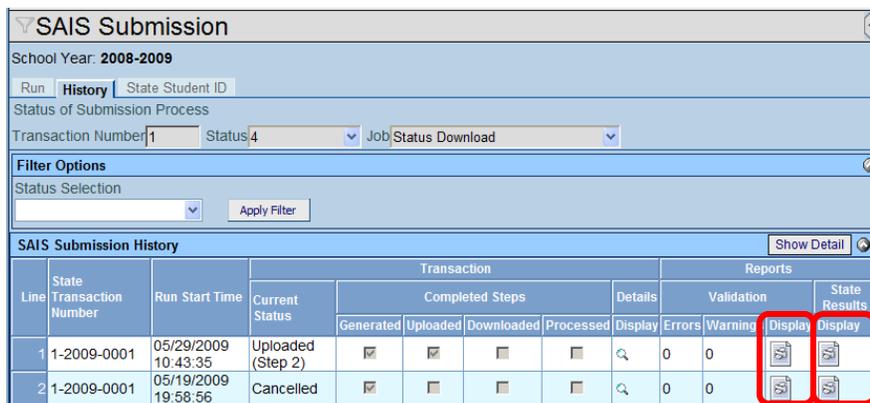


Figure 1.80 – History Tab of the SAIS Submission Screen

To see the detail of any one submission, click the **Show Detail** button and click the line number of the submission to screen.

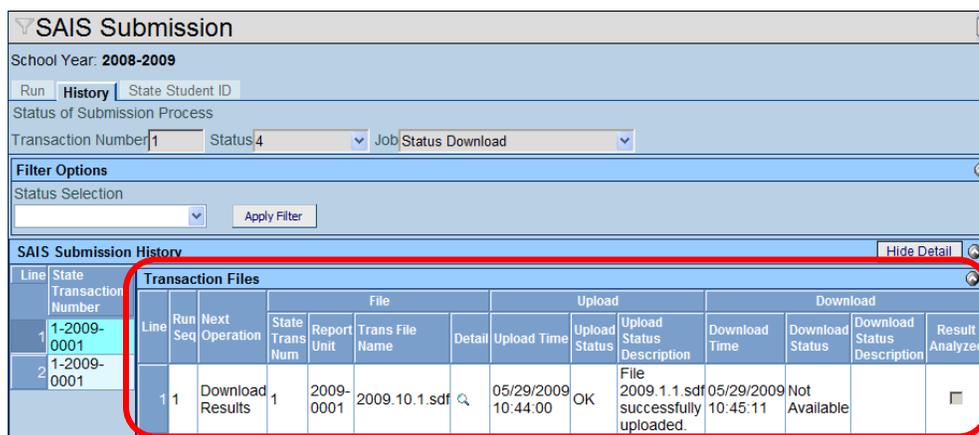


Figure 1.81 – History Tab of the SAIS Submission Screen, Show Detail

The information displayed is the same transaction status information that displays on the bottom of the Run tab as the submission is being processed. For a complete explanation of each section, see steps 22-26 of the How to Run the Submission Process section in this chapter.

## **YEAR END PROCESSES**

At the end of the school year, the state of Arizona frequently makes significant changes to the data upload process. Consequently, the submission process in Synergy SIS is updated to match the new processes and requirements for the state and can no longer submit for previous school years. Generally, the new release that switches the submission process to the new year occurs in August.

Before installing the patch or release that updates the submission process, districts should create a final backup of the database for the previous year and maintain a copy of the Synergy SIS release and patches for that year as of June 30. This allows districts to submit data through the 915 process for previous year data while still submitting for the new year.

# Chapter Two: SAIS COMPARISON

In this chapter, the following topics are covered:

- ▶ What is the SAIS Comparison
- ▶ How to run the SAIS Comparison process

# WHAT IS THE SAIS COMPARISON PROCESS?

The SAIS Comparison Process takes a file downloaded from the state of Arizona and compares the data in the file to the data stored in Synergy SIS. This helps districts identify missing or incorrect information to ensure all student information has been uploaded to the state. This will help the district receive all possible funding, and also provides a tool to use during the audit procedure to show compliance.

Currently only the ADMS72 is available for comparison, but eventually the SAIS Comparison tool will support the ADMS75 report, the ELL reports, the SPED reports, and any other reports available from the Dept. of Education that would be helpful in data verification and correction.

The ADMS72 Report is the Unadjusted ADM Report, and it lists all students reported for the school. For each student it records their enter and leave date, the track number, FTE, Tuition Payer Code, Special Enrollment Code, Homebound Code, and the number of absence days. Since only absences are reported to the state after FY2009, reported attendance is no longer available on the report.

SdADMS72												
Arizona Department of Education Unadjusted Membership Calculations Report											Page: 1	Print Date: 10/30/2007 15:14:13
Requesting District ID:		00-02-98										
Requesting District Name:		XYZ Unified School District										
School Name:		XYZ Elementary School										
School CTDS:		00-02-98-001										
Grade:		5										
<u>DOR CTDS</u>		<u>DOR Name</u>										
00-02-98		XYZ Unified School District										
<u>Grade</u>		<u>Register ID</u>										
5		0005										
SAIS ID	School Student ID	Name	First Day of Membership	Last Day of Membership	Track Num	FTE	Tuition Payer	Special Enroll	HB	Reported Absence	Reported Attendance	Codes
1234567	5555	Duck, Donald	08/06/2007	N/A	1	1.00	1	N/A	No	6.50	N/A	N/A
2345671	5432	Mouse, Mickey	08/06/2007	10/05/2007	1	1.00	1	N/A	No	N/A	N/A	N/A
3456712	4321	Mouse, Minnie	09/18/2007	N/A	1	1.00	1	N/A	No	0.50	N/A	N/A
<p>The Reported Absence number is the amount of absence reported for the specified period, and the Reported Attendance number is the amount of attendance reported during that period.</p> <p><b>Notes:</b></p> <ol style="list-style-type: none"> <li>1 Student has a concurrent enrollment during all or part of this membership in another grade, track, or register in this school.</li> <li>2 Student has a concurrent enrollment during all or part of this membership in another school in this district.</li> <li>3 Student has a concurrent enrollment during all or part of this membership in another school in another district./TED/charter.</li> <li>4 This membership failed integrity processing and was not included in the calculations for ADM and ADA.             <ol style="list-style-type: none"> <li>a. Integrity failed during the 40th day reporting period.</li> <li>b. Integrity failed during the 100th day reporting period.</li> <li>c. Integrity failed for the reporting period after 100th day.</li> </ol> </li> <li>5 Integrity has not been run since the last student data change.             <ol style="list-style-type: none"> <li>a. Integrity has not been run for the 40th day reporting period.</li> <li>b. Integrity has not been run for the 100th day reporting period.</li> <li>c. Integrity has not been run for the 101st day through End of Year reporting period.</li> </ol> </li> </ol>												

Figure 2.1 – Sample ADMS72 Report

## HOW TO RUN THE SAIS COMPARISON

Before starting the comparison process, select a school to examine. The comparison only works at the **school level**, and the screen is not available when focused at the district level.

The comparison process is a three-step process. For Step One, download the ADMS72 Report from the SAIS system for the school in a text file format. In Step Two, the file is uploaded into Synergy SIS. In the final step, the comparison process is run.

To download the ADMS72 report:

1. Using an Internet browser, go to the **Common Logon** page for the SAIS system: <https://www.ade.az.gov/commonlogon/Login.asp?Mode=Logon>.



Figure 2.2 – SAIS Common Logon

2. Enter the **username** and **password** and click the **Continue >>** button.
3. Click the **Student Detail Data Interchange (SDDI)** link.

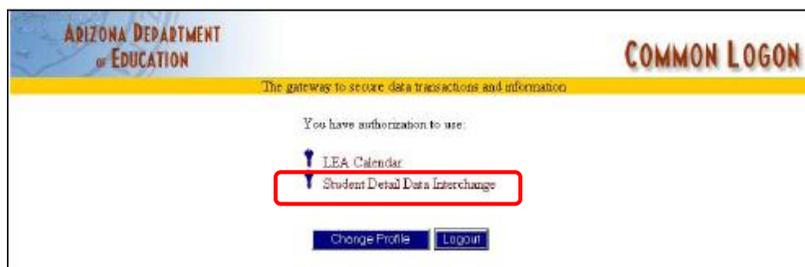


Figure 2.3 – SAIS List of Programs Available

4. Choose the school for comparison from the **Select the School** drop-down menu. The reports must be run at the school level, not the district level.

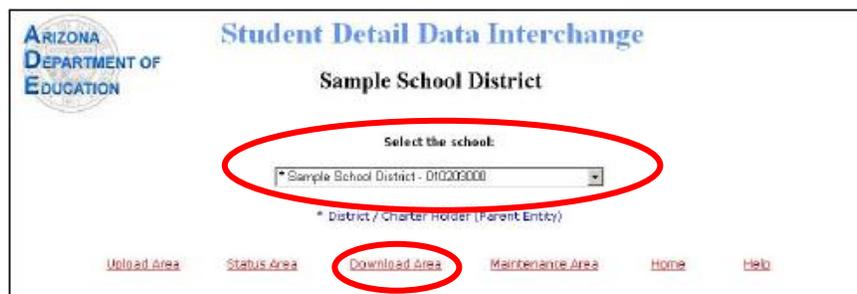


Figure 2.4 – Student Detail Data Interchange page

5. By default the report downloads for the current fiscal year. To run the report for a different year, select the four digit year in the **Fiscal Year** box.

- After the school and year is selected, click the **Download Area** link.

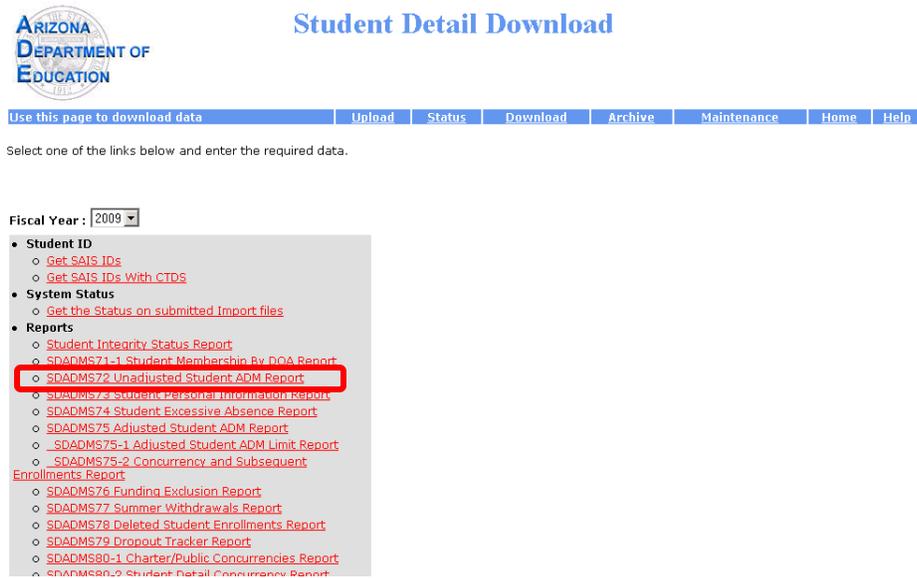


Figure 2.5 – Student Detail Download

- Select the **SDADMS72 Unadjusted Student ADM Report** from the list on the left-hand side of the page.

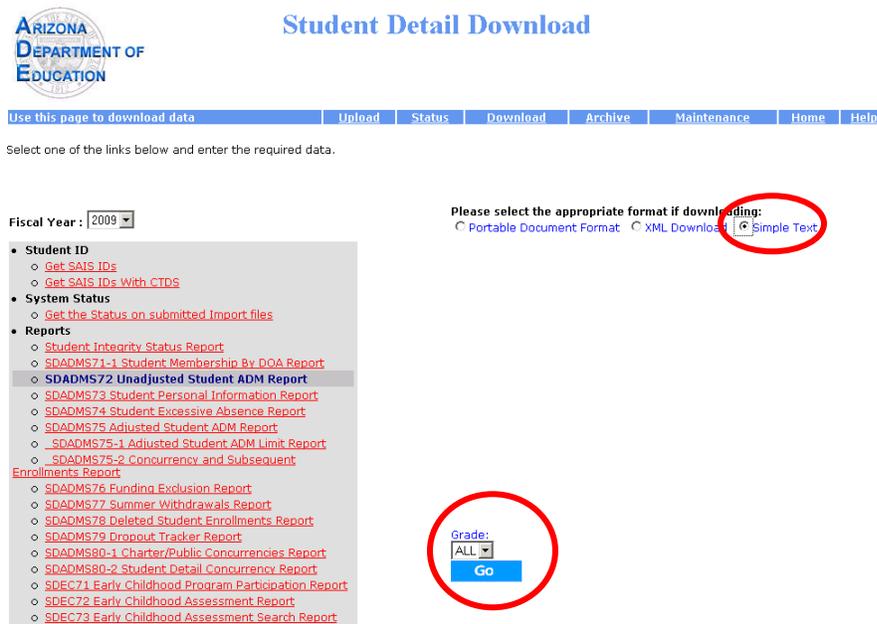


Figure 2.6 – Student Detail Download, SDADMS72 Download

- Click on the radio button for the **Simple Text** format.
- Choose the grade level to download from the **Grade** drop-down. Select All to download all grades at the school.
- When all options have been selected, click the **Go** button.

11. A box pops-up prompting to either Run or Save the file. Click the **Save** button to save the report. The name of the file may be in any format, but remember the location to where it is saved!



Figure 2.7 – File Download Dialog Box

To upload the file to Synergy SIS:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

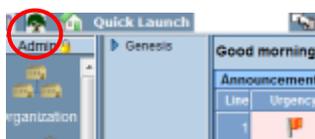


Figure 2.8 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

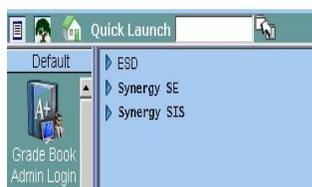


Figure 2.9 – Synergy SIS Folder

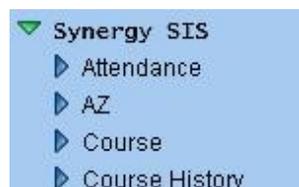
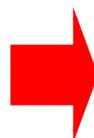


Figure 2.10 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word **AZ**. Once clicked, the triangle turns green and points downward.



Figure 2.11 – AZ Folder



Figure 2.12 – AZ Folder Expanded

4. Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.



Figure 2.13 – SAIS Folder



Figure 2.14 – SAIS Folder Expanded

5. Click on the **SAIS Comparison** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 2.15 – SAIS Comparison Screen Icon

6. Check to make sure the current **focus** is set to the school for which the report was downloaded. The focus is indicated in the top right-hand corner of the screen.



Figure 2.16 – Checking Current Focus

7. If this is the first time the comparison has been run for the school, continue to Step 9. If the comparison has been run before, the current data must be cleared before adding a new 72 report or the 72 data will be duplicated. To clear the current data, click on the **Show Detail** button.

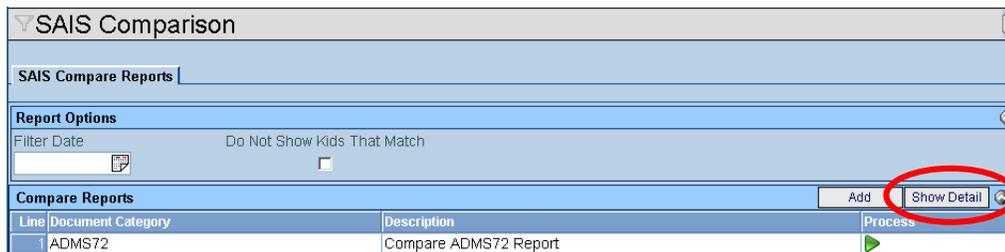


Figure 2.17 – SAIS Comparison Screen, Show Detail Button

- To remove all the students from the comparison, click the **Clear All Students** button. This only removes the students loaded for the school in focus. Students uploaded at other schools will remain. Once the students have been cleared, a new file can be uploaded.

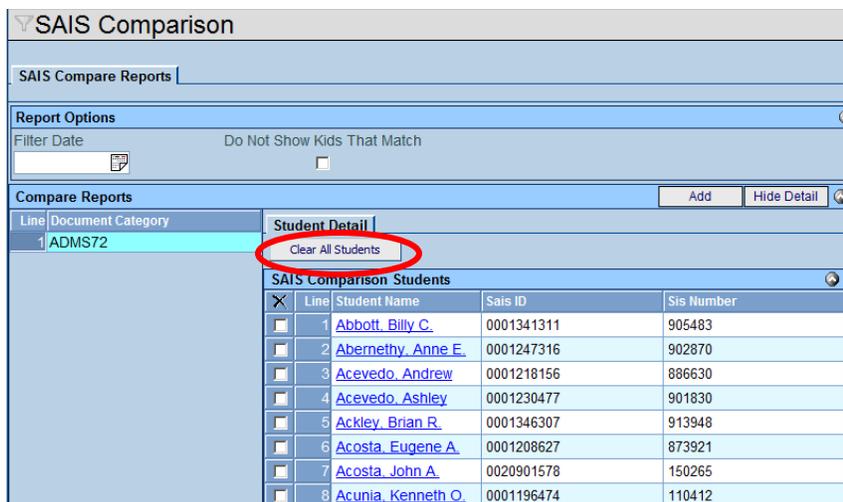


Figure 2.18 – SAIS Comparison, Detailed Screen

- To add a new 72 report, click the **Add** button in the Compare Reports section.

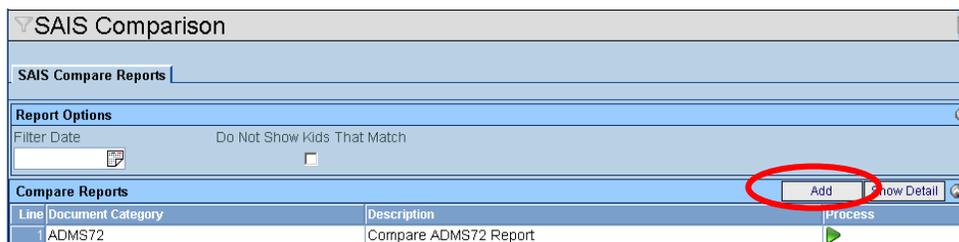


Figure 2.19 – SAIS Comparison Screen

- The Attach Document box pops-up. Click the **Browse** button to locate the report file downloaded from the state.

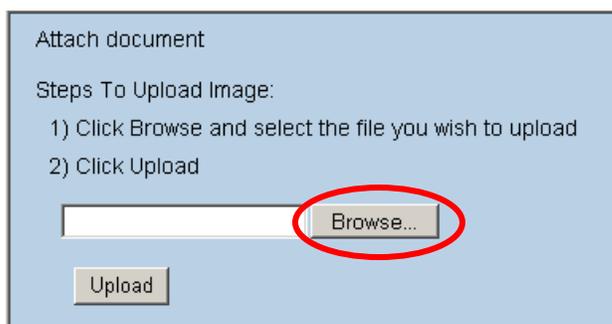


Figure 2.20 – Attach Document box

11. Click through the folders to locate the file that was downloaded. Click on the file, and then click the **Open** button.

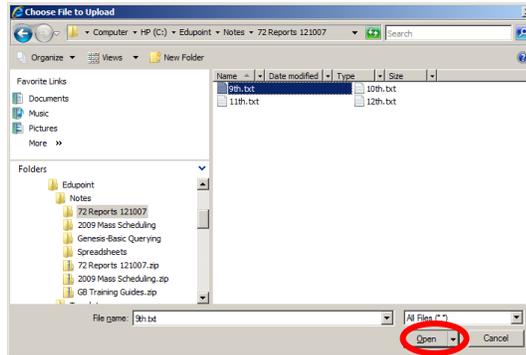


Figure 2.21 – Choose File to Upload Box

12. When the location and name of the file appears in the box, click the **Upload** button.

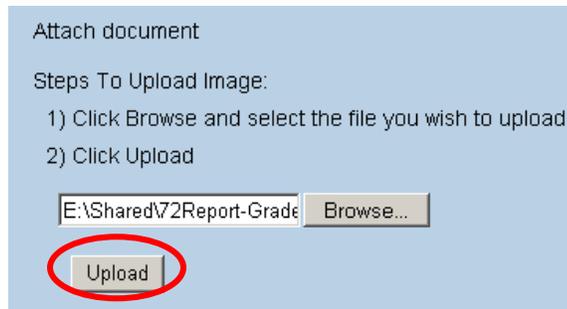


Figure 2.22 – Upload Box

13. When the upload is complete, the Upload Successful! Box appears. Click **OK** to acknowledge the message.



Figure 2.23 – Upload Successful Box

Once the data from the state has been uploaded, the uploaded students can be seen in the detailed screen of the SAIS Comparison screen. To see the uploaded students:

1. Click the **Show Detail** button on the SAIS Comparison screen.

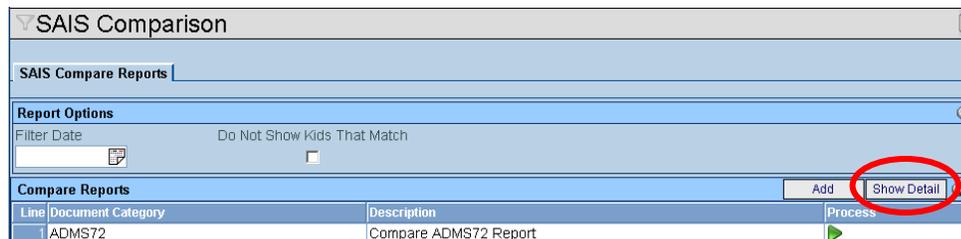


Figure 2.24 – SAIS Comparison Screen, Show Detail Button

- To remove all the students from the comparison, click the **Clear All Students** button. This only removes the students loaded for the school in focus. Students uploaded at other schools will remain.

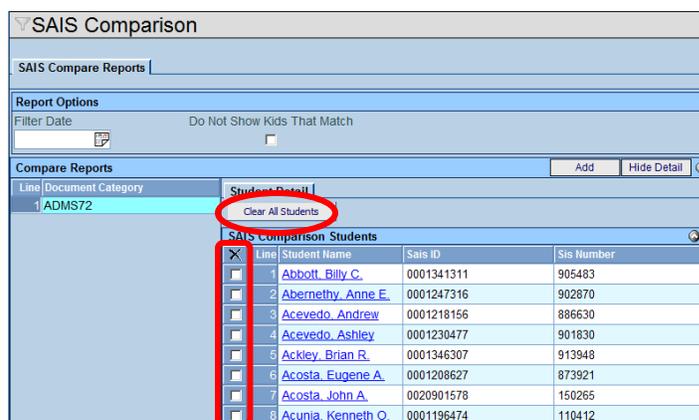


Figure 2.25 – SAIS Comparison, Detailed Screen

- Individual students may also be removed from the comparison process by checking them off in the **X** column. Then click the **Save** button to delete those students.

To run the comparison process:

- Adjust the **Report Options** for the comparison. The options are:
  - Filter Date** – The report downloaded from the state only contains the data up through the last SAIS submission. Any data in Synergy SIS entered **AFTER** the last submission will not be on the downloaded ADMS72 report, and it will show up as “unmatched” in the comparison report. To exclude the latest data and remove potential errors, enter the date of the last submission in the Filter Date box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.
  - Do Not Show Kids That Match** – Students that match are uploaded to the state correctly and the data at the state and in Synergy SIS is matching. Since no action needs to be taken for these students, they can be excluded from the report by checking the Do Not Show Kids That Match box.

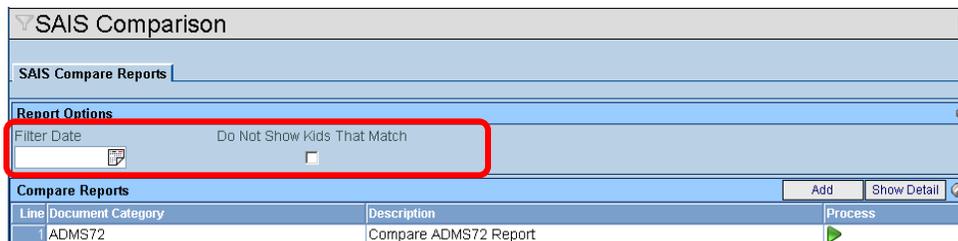


Figure 2.26 – SAIS Comparison Screen, Report Options

- Once the options are set, click the **green arrow symbol** in the Process column in the ADMS72 row to run the report.

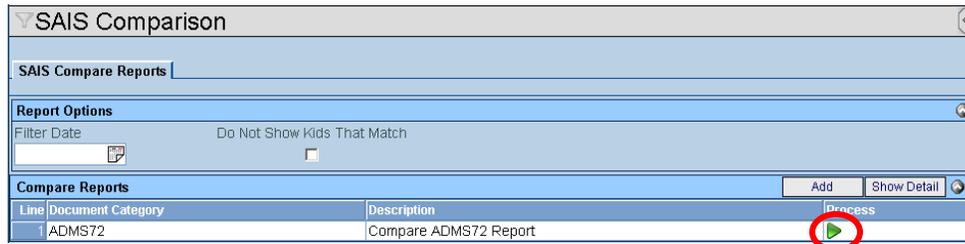


Figure 2.27 – SAIS Comparison Screen, Process Button

- The report pops-up in a PDF format.

The PDF report is titled 'Adams Elementary SAIS Comparison ADMS72' for the year 2008-2009, Report: STU501. It features the Edupoint School District logo. The main content is a table titled 'Students at ADE and in GENESIS but have differences'. The table has columns for Student Name, Grd, SIS Number, SAIS ID, Genesis Absence, ADE Absence, and Difference. The data is as follows:

Student Name	Grd	SIS Number	SAIS ID	Genesis Absence	ADE Absence	Difference
Begay, Bruce	06	126210	00034155 31	2.00	1.50	-0.50
Brown, David	04	152885	00210083 51	2.00	1.00	-1.00
Calixto, Laura	05	967629	00006101 56	1.00	0.00	-1.00
Carter, Phillip	K	148954	00206177 39	1.00	0.50	-0.50
Charley, Beverly	06	968612	00007373 33	1.00	0.00	-1.00
Cohoe, Patrick	04	972119	00007376 85	1.00	0.50	-0.50
Corthell, Jason	01	148321	00209943 58	1.00	0.00	-1.00
Delgado, Billy	03	124906	00028951 56	1.00	0.00	-1.00
Escoto, Helen	03	105585	00189006 75	1.00	0.50	-0.50
Flores Chacon, Douglas	02	115411	00078415 12	1.00	0.50	-0.50
Galindo, Louis	06	135603	00106860 58	2.00	0.00	-2.00
Luster, Johnny	05	964883	00007369 61	1.00	1.50	0.50
Student Sub Total		12				

Figure 2.28 – SAIS Comparison Report

- The report is divided into 4 sections of students:
  - Students in both but not matching* – These students are in both Synergy SIS and the 72 Report, but the attendance numbers don't match.
  - Students in Synergy SIS but not the 72 Report* – These students are in Synergy SIS but are not on the ADMS72 report, and most likely have not been uploaded to the SAIS system due to a validation error.
  - Students in the 72 Report but not in Synergy SIS* – These students are listed in the 72 report but are no longer in Synergy SIS. They may have been deleted from Synergy SIS or no showed, but the data removing them from the SAIS system has not been uploaded.
  - Students that match* – These students' data is the same in both Synergy SIS and the 72 Report and it does not need further correction.

**Note:** Possible causes for a student to be in Synergy SIS but not on the ADMS72 Report

- A transaction adding an *enrollment* for the missing student has not been successfully processed in SAIS. This would most likely occur for one of two reasons: 1) an enrollment transaction for the missing student was never submitted to SAIS; 2) a submitted enrollment transaction failed during SAIS import processing.
- The last enrollment transaction to successfully process in SAIS deleted the enrollment for the missing student. Students who have been successfully deleted from membership, participation in special education or participation in an English Language Learner program are listed on the *SDADMS78 – Deleted Student Enrollment Report*.
- The student has been successfully enrolled as a member of the school in SAIS, but, due to a data entry error, is listed under a funded district of residence, grade level or register ID other than what had been intended. Such students will appear on an SDADMS72 report, but not under the grade, register or DOR intended.

*--from Reconciling ADMS72 and 75 Reports with Student Rosters, Arizona Department of Education, November 2007*



# Chapter Three: COMMUNITY COLLEGE

In this chapter, the following topics are covered:

- ▶ Adding community college courses to a student's record

# ADDING COMMUNITY COLLEGE RECORDS

If students at the district take community college classes for credit at their high school, a record of these classes needs to be entered into Synergy SIS. To enter a student's records:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

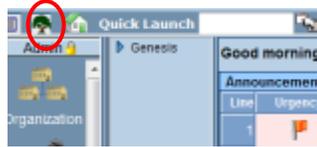


Figure 3.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

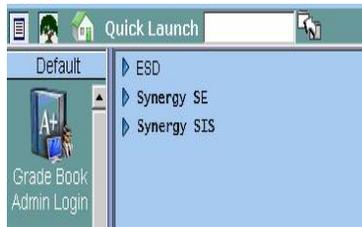


Figure 3.2 – Synergy SIS Folder



Figure 3.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 3.4 – AZ Folder



Figure 3.5 – AZ Folder Expanded

4. Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.



Figure 3.6 – SAIS Folder



Figure 3.7 – SAIS Folder Expanded

5. Click on the **Community College** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 3.8 – Community College Screen Icon

Find the student for which to enter the courses. To find a student's record, there are two methods: **Scroll or Find**. To scroll through the student records to find the student:

1. Click on the **right Scroll button** at the top of the screen to advance to the first student's records. Records are sorted alphabetically by last name, so the first student to appear most likely has a last name that starts with A.



Figure 3.9 – Right Scroll Button

2. To scroll in reverse alphabetical order, click the **left Scroll button** at the top of the screen.



Figure 3.10 – Left Scroll Button

3. Continue clicking on the scroll buttons until the desired student record appears.

To switch to the Find mode to look for the student records:

1. Click on the **Find Mode** button.



Figure 3.11 – Find Mode Button

2. Enter either the whole last name or the first part of the last name of the student in the **Last Name** box.

 A screenshot of the software interface in Find Mode. The 'Form Status' is 'Find'. The search bar contains 'Community College'. Below it, the 'Student Name: School: Status:' fields are visible. A table with columns 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'Grade', and 'Gender' is shown. The 'Last Name' cell contains 'Smith' and is circled in red. Below the table is a section titled 'Community College Classes' with an 'Add' button and a table with columns 'Line', 'College State ID', 'College Entry Date', 'College Exit Date', and 'College Class Count'.

Figure 3.12 – Finding By Last Name

3. Click the **Find** button or press the **Enter** key. The first student with the last name entered into the Find screen appears. Then use the scroll buttons if needed to find the exact student.



**Note:** In the Find Mode, students can also be found by searching by any of the yellow fields on the screen. Entering anything in any box but the first one brings up a pop-up window with a list of students matching

the criteria entered. To select a student, click on their name and their student record appears in the Community College screen. Close the pop-up window after selecting the record. For more about finding students in any screen, please refer to the *Synergy SIS – Student Information User Guide*.

4. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 3.13 – Checking Current Focus

5. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 3.14 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 3.15 – Current Form Status

6. Click the **Add** button in the Community College Classes section.

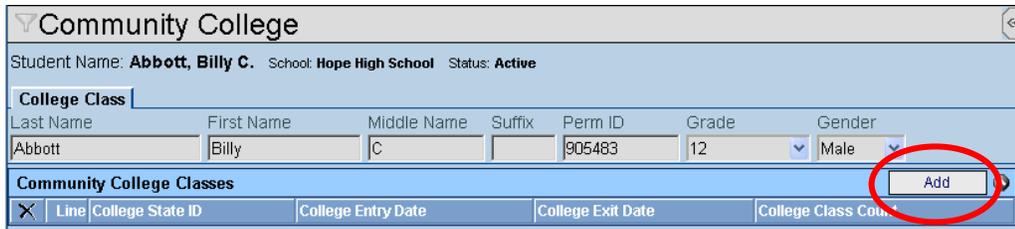


Figure 3.16 – Community College Screen, Adding

7. A blank line is added. Enter the class ID of the course in the **College State ID** box.

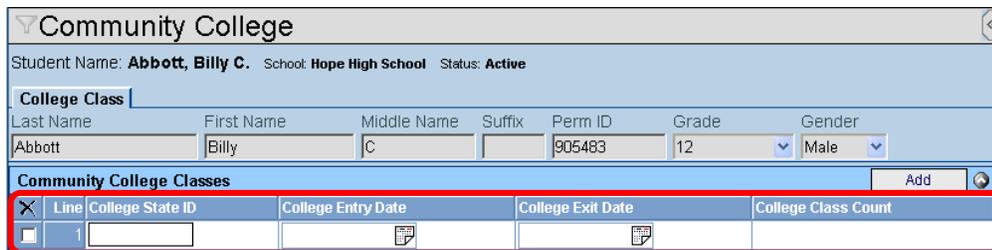


Figure 3.17 – Community College Screen, Adding

8. Enter the date the student started the class in the **College Entry Date** box, and the date the student completed the class in **College Exit Date**. The dates should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.
9. Enter the number of classes completed in the **College Class Count** field.
10. Click the **Save** button at the top of the screen to save the changes.

To delete a course:

1. Check the box in the **X** column next to the class to be deleted.

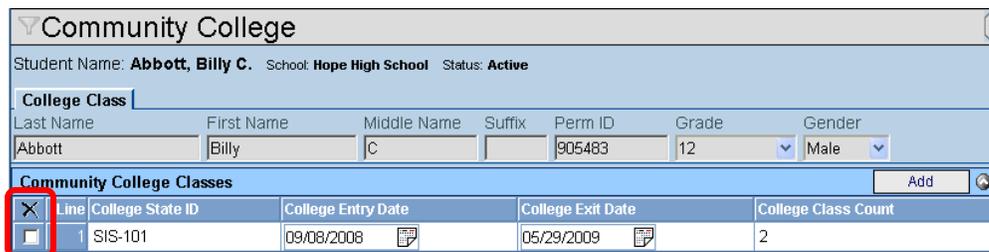


Figure 3.18 – Community College Class, Deleting

2. Click the **Save** box at the top of the screen to delete the class.

## MENU OPTIONS

At the top of the Community College screen, a **Menu** button provides access to additional information regarding the student’s records.



Figure 3.19 – Community College Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Community College** – the Audit Trail History screen lists all of the changes made to the student’s records, what was changed, who changed it, and the date and time the change was made. It is the same audit trail report available through the Student screen. Since the college information is stored in a grid, it is not yet available for tracking via the audit detail report.

The screenshot shows the 'Audit Trail History' screen with a table of properties. The table has columns: Line, Business Object, Property Name, Crud Action, New Value, Old Value, User Name, and Date Time Stamp.

Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name	Date Time Stamp
1	Student	HomeLanguage	Update	01	00	Wilson, Rob	12/08/2008 08:20:02
2	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/24/2008 15:45:41
3	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:31
4	Student	GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:31
5	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:22
6	Student	GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:22
7	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:43
8	Student	GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:43
9	Student	GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:36
10	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:36
11	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/15/2008 16:49:31
12	Student	GridCode	Update	741B	741B	Wilson, Rob	06/03/2008 21:40:50
13	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:40:50
14	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:40:50
15	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:39:56
16	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:39:56
17	Student	GridCode	Update	741B	741B	Wilson, Rob	06/03/2008 21:39:56
18	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:37:57
19	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:37:57
20	Student	GridCode	Update	99999	99999	Wilson, Rob	06/03/2008 21:37:57

Figure 3.20 – Audit Trail History for Community College

The **Print** button at the top of the screen may be used to print the information on the Special Ed Student Services screen.



Figure 3.21 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Menu | << | 🔍 | >> |  | Save | Undo |  Form Status: Ready (Update Mode) |  |  | 

---

 **Community College**

---

Student Name: **Abbott, Billy C.** School: Hope High School Status: Active

**College Class** |

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Ge
Abbott	Billy	C		905483	12	Ma

**Community College Classes** Add 

X	Line	College State ID	College Entry Date	College Exit Date	College Class Count
<input type="checkbox"/>	1	SIS-101	09/08/2008 	05/29/2009 	2

Figure 3.22 – Printed Community College Screen

# Chapter Four: SPECIAL EDUCATION

In this chapter, the following topics are covered:

- ▶ The 45-day special education screening date
- ▶ The initial IEP date
- ▶ Adding special education service records
- ▶ Screening & deleting special education service records
- ▶ Recording a student's withdrawal from special education
- ▶ How to re-enroll a student in special education

## ENTERING THE SCREENING DATE

Within 45 days of a student's enrollment, every student must go through a special education screening. The date of this screening should be entered into Synergy SIS.

To enter the special education screening date:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

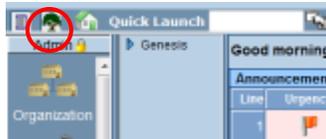


Figure 4.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 4.2 – Synergy SIS Folder



Figure 4.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student** folder by clicking on the blue triangle pointing right, next to the word Student. Once clicked, the triangle turns green and points downward.



Figure 4.4 – Student Folder



Figure 4.5 – Student Folder Expanded

4. Click on the **Student** screen, and the screen appears in the content pane on the right-side of the screen.

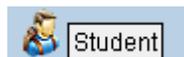


Figure 4.6 – Student Screen Icon

Find the student for which to enter the screening date. To find a student's record, there are two methods: **Scroll or Find**. To scroll through the student records to find the student:

1. Click on the **right Scroll button** at the top of the screen to advance to the first student's records. Records are sorted alphabetically by last name.



Figure 4.7 – Right Scroll Button

2. To scroll in reverse alphabetical order, click the **left Scroll button**.



Figure 4.8 – Left Scroll Button

3. Continue clicking on the scroll buttons until the desired student record appears.

To switch to the Find mode to look for the student records:

1. Click on the **Find Mode** button.



Figure 4.9 – Find Mode Button

2. Enter either the whole last name or the first part of the last name of the student in the **Last Name** box.

 A screenshot of the 'Student Information' form. The 'Last Name' field in the 'Demographic' section is circled in red. The form includes various tabs like 'Parent/Guardian', 'Other Info', 'Emergency', etc., and several input fields for student details.

Figure 4.10 – Finding By Last Name

3. Click the **Find** button or press the **Enter** key. The first student with the last name entered into the Find screen appears. Then use the scroll buttons if needed to find the exact student.



**Note:** In the Find Mode, students can also be found by searching by any of the yellow fields on the screen. Entering anything in any box but the first one brings up a window with a list of students matching the criteria entered. To select a student, click on their name and their student record appears in the Student screen. Close the window after selecting the record. For more about finding students in any screen, please refer to the *Synergy SIS – Student Information User Guide*.

4. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.11 – Checking Current Focus

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.12 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 4.13 – Current Form Status

- Click on the **Other Info** tab.

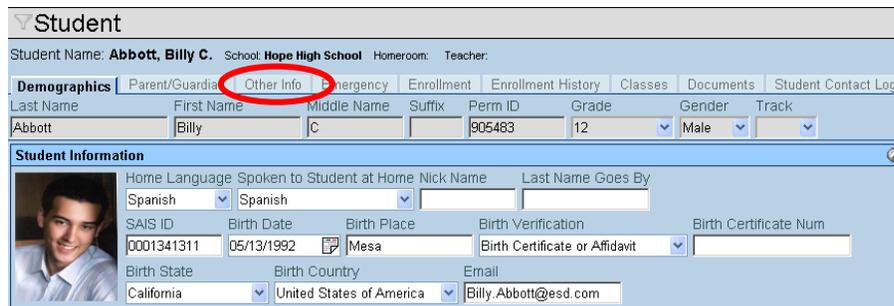


Figure 4.14 – Student Screen

- Enter the date in the **Special Ed Screening Date** field. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.

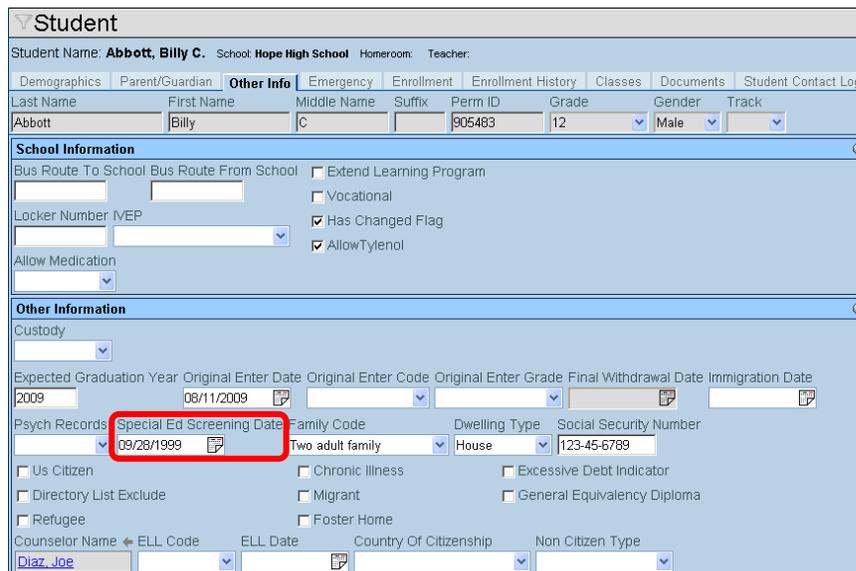


Figure 4.15 – Other Info Tab, Student Screen

- Save your changes by clicking the **Save** button at the top of the screen.

## ENTERING THE INITIAL IEP DATE

If a student is determine eligible for special education services and has not been in a special education program before, an initial IEP (Individualized Education Plan) must be completed within 30 days. To enter the date on which the initial IEP was completed:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

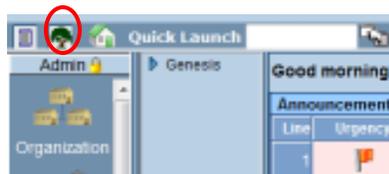


Figure 4.16 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 4.17 – Synergy SIS Folder

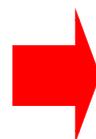


Figure 4.18 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 4.19 – Student Folder



Figure 4.20 – Student Programs Folder Expanded

4. Click on the **Special Ed Student Services** screen, and the screen appears in the content pane on the right-side of the screen.

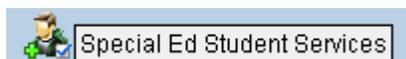


Figure 4.21 – Special Ed Student Services Screen Icon

5. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.22 – Checking Current Focus

- Find the student for which to enter the initial IEP date using either the **Scroll or Find** method.

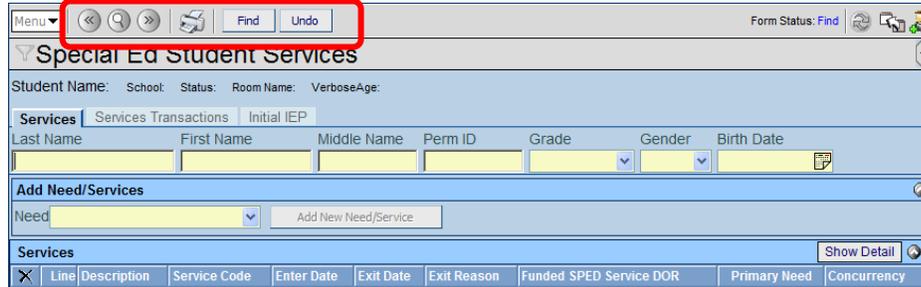


Figure 4.23 – Special Ed Student Services Screen

- Once the student has been located, click on the **Initial IEP** tab.

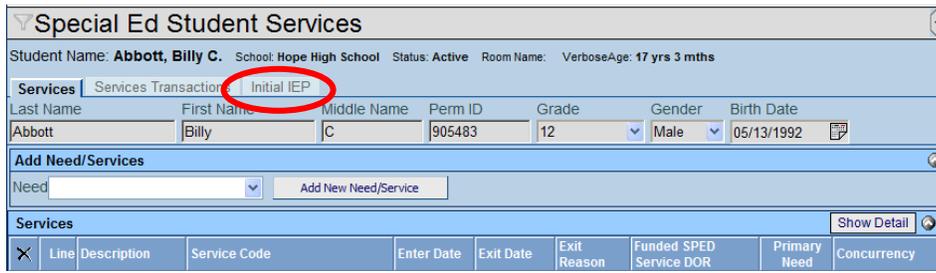


Figure 4.24 – Special Ed Student Services Screen, Student Info

- Change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.25 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 4.26 – Current Form Status

9. Enter the following information in the boxes provided:

Special Ed Student Services

Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Room Name: **231** VerboseAge: **24 yrs 0 mths**

Services | Services Transactions | **Initial IEP**

Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Birth Date
Abbott	Billy	C	905483	12	Male	05/13/1985

**IEP Dates**

Initial IEP Date	Proposed Service Date	AZ EIP Indicator
		<input type="checkbox"/>

Figure 4.27 – Special Ed Student Services Screen, Initial IEP Tab

- **Initial IEP Date** – enter the date on which the initial IEP was completed. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- **Proposed Service Date** – enter the date on which the student will begin to received special education services. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- **AZ EIP Indicator** – if the student participated in the AZ EIP (Arizona Early Intervention Program for children from birth to age 3), check this box.

10. Click the **Save** button at the top of the screen to save the data.

## ADDING SPECIAL EDUCATION SERVICES

Once a student is eligible for special education services, the special education team determines the primary need and what services will be provided to fulfill that need. This information needs to be recorded in Synergy SIS so that it can be reported to the state in conjunction with the normal upload procedure. To record a student's special education need and service:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

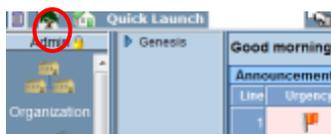


Figure 4.28 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 4.29 – Synergy SIS Folder

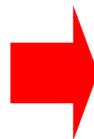


Figure 4.30 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 4.31 – Student Folder

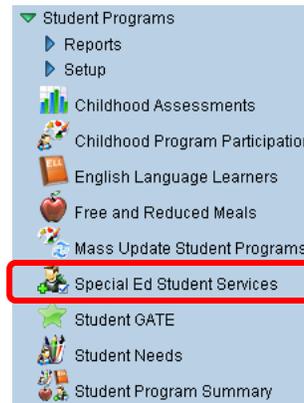


Figure 4.32 – Student Programs Folder Expanded

- Click on the **Special Ed Student Services** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 4.33 – Special Ed Student Services Screen Icon

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.34 – Checking Current Focus

- Find the student for which to enter the special education services using either the **Scroll or Find** method.

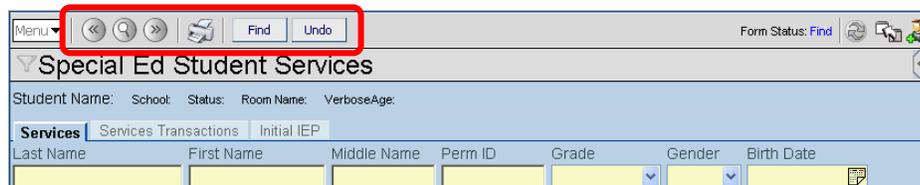


Figure 4.35 – Special Ed Student Services Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.36 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 4.37 – Current Form Status

- Select the student's need from the **Need** drop-down box, and click the **Add New Need/Service** button.

Special Ed Student Services

Student Name: **Abbott, Billy C.** School: Hope High School Status: Active Room Name: VerboseAge: 17 yrs 3 mths

Services | Services Transactions | Initial IEP

Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Birth Date
Abbott	Billy	C	905483	12	Male	05/13/1992

**Add Need/Services**

Need: [Dropdown] Add New Need/Service

Services [Show Detail]

Line	Description	Service Code	Enter Date	Exit Date	Exit Reason	Funded SPED Service DOR	Primary Need	Concurrency
------	-------------	--------------	------------	-----------	-------------	-------------------------	--------------	-------------

Figure 4.38 – Special Ed Student Service Screen, Adding

- The Spec Ed Service Add screen pops-up. Select the service the student will be receiving from the **Service Code** drop-down box.

Save Service Close

Spec Ed Service Add

Add Service

Need: Hearing Impairment

Service

Service Code	Enter Date	Exit Date	Exit Reason
A-Inside Regular Class 80% or more of the	09/08/2008		

Funded SPED Service DOR	Concurrency
123456000	

Figure 4.39 – Spec Ed Service Add Screen

- Enter the date the student will begin receiving the service in the **Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button. By default it enters today's date.
- By default the CTD code of the current district in focus in Synergy SIS is entered in the **Funded SPED Service DOR** box. If this student's special education services are funded by another district enter the CTD code for that district in the Funded SPED Service DOR box.
- Select the school's role in coordinating the student's special education needs from the **Concurrency** drop-down list. If this school is the primary coordinator, select **Primary**. If this school provides some special education services to the student but does not manage the student's case, select **Secondary**. If nothing is selected, it is uploaded to the state as Primary. **All services for a student must have the same concurrency selected.**



**Reference:** The CTD code is assigned to the district by the state of Arizona. For instructions on how to look up the CTD code of a district, see the Before Starting section in Chapter 1 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

- Click the **Save Service** button at the top of the screen to save the record, or click Close to close the screen without saving.

- Once the need & service has been added, indicate the primary need on the Services tab by clicking the box under **Primary Need**.

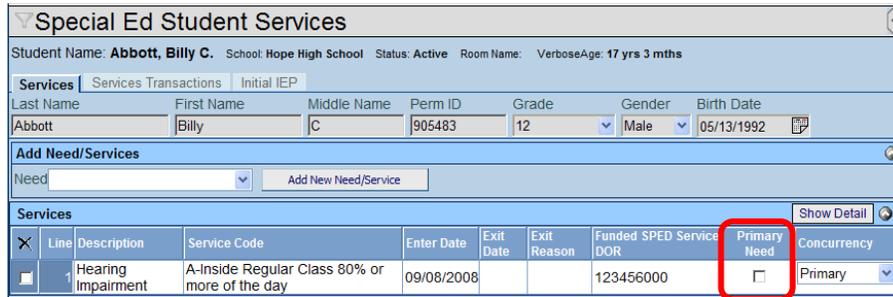


Figure 4.40 – Special Ed Student Services Screen

- Click the **Save** button at the top of the screen to save the change.
- If the student entered the school with a Certificate of Educational Convenience or through Open Enrollment, enter this enrollment code in the detailed screen of the need/service. To enter the special enrollment code, click the **Show Detail** button.

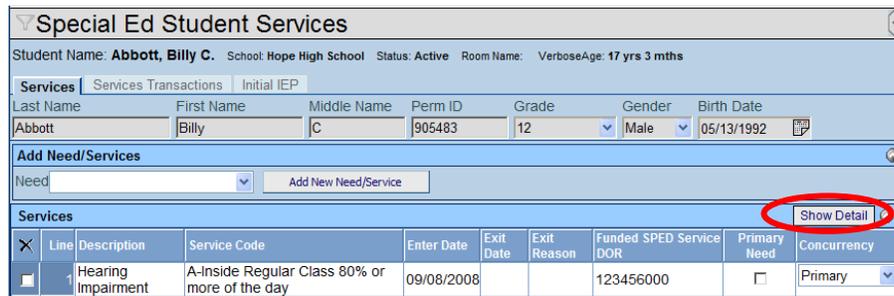


Figure 4.41 – Special Ed Student Services Screen, Show Detail button

- Select the type of enrollment from the **Special Enrollment Code** drop-down box.

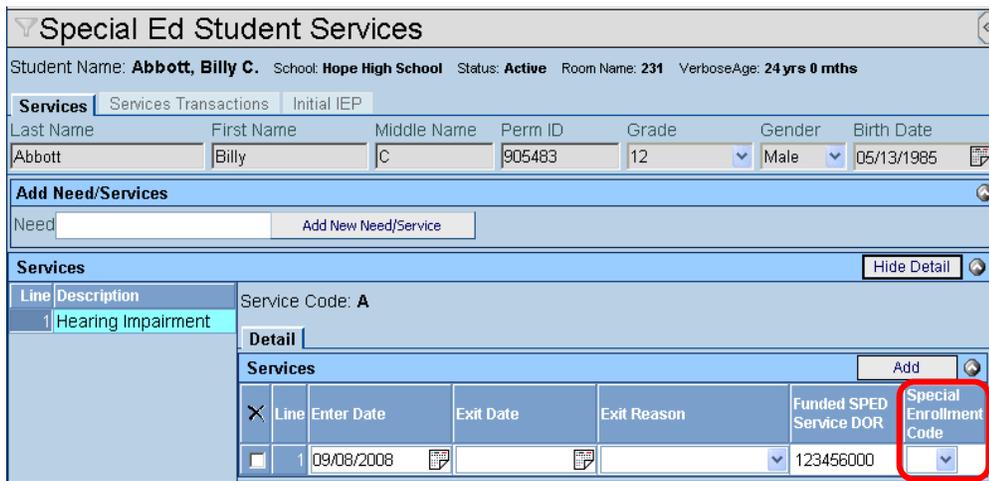


Figure 4.42 – Special Ed Student Services, Detailed Screen

- If there are multiple needs/services, the enrollment code must be entered for each need/service during that enrollment period. Click on each need/service line on the left-hand side to select the enrollment code.
- Click the **Save** button at the top of the screen to save the changes.

# WITHDRAWING FROM SPECIAL EDUCATION SERVICES

When a student is no longer participating in special education, the exit date and reason must be recorded in the Special Ed Student Services screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the special education services at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

To record the student’s withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.43 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.

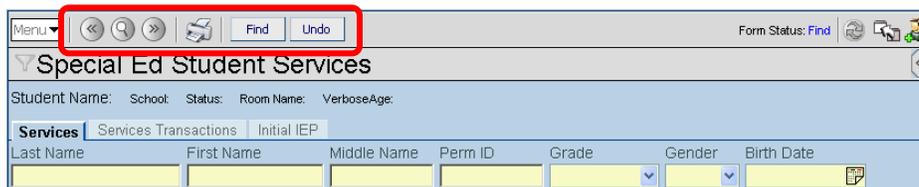


Figure 4.44 – Special Ed Student Services Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.45 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 4.46 – Current Form Status

- Click on the **Show Detail** button in the Special Ed Student Services screen.

The screenshot shows the 'Special Ed Student Services' interface for student Abbott, Billy C. The student's status is 'Active' and room name is 'VerboseAge: 17 yrs 3 mths'. The 'Services' tab is selected. Below the student information, there is an 'Add Need/Services' section. The main 'Services' table has one row: Line 1, Description 'Hearing Impairment', Service Code 'A-Inside Regular Class 80% or more of the day', Enter Date '09/08/2008', and Funded SPED Service DOR '123456000'. The 'Show Detail' button at the end of this row is circled in red.

Figure 4.47 – Special Ed Student Services Screen, Show Detail button

- Select the **need/service line** to withdraw by clicking on it on the left-hand side of the screen.

This screenshot shows the detailed view of the 'Hearing Impairment' service line. The line is highlighted with a red box. Below the line, the 'Detail' section is open, showing a table with columns for Line, Enter Date, Exit Date, Exit Reason, Funded SPED Service DOR, and Special Enrollment Code. The 'Exit Date' and 'Exit Reason' fields are highlighted with red boxes. The 'Exit Date' field contains '09/08/2008' and the 'Exit Reason' field is empty.

Figure 4.48 – Special Ed Student Services, Detailed Screen

- Enter the date the student withdrew in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- Select the reason the student withdrew from the **Exit Reason** drop-down box.
- Click the **Save** button at the top of the screen.



**Tip:** All students must be marked as withdrawn from Special Education Services at the end of the year using the School is Out code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

The exit code selected for the SPED withdrawal must also match the withdrawal code used in the enrollment record for the student or the Year End Status. The appropriate matches are:

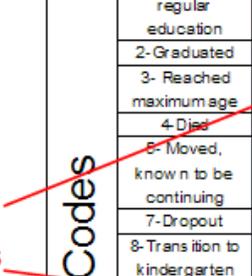
		Year End Codes							
		G-Graduated	C-Completed	A-Attended	SA-Still Enrolled (AIMS)	SC-Still Enrolled (course req)	SE-Still Enrolled (met no req)	P-Promoted	R-Retained
<b>SPED Exit Codes</b>	1-Transfer to regular education	yes	yes	yes	yes	yes	yes	yes	yes
	2-Graduated	yes	no	no	no	no	no	no	no
	3- Reached maximum age	no	yes	yes	no	no	no	no	no
	4-Died	no	no	no	no	no	no	no	no
	5- Moved, known to be continuing	no	no	no	no	no	no	no	no
	7-Dropout	no	no	no	no	no	no	no	no
	8-Transition to kindergarten	no	no	no	no	no	no	yes	no
	9-Ends one SPED service but starts another	no	no	no	no	no	no	no	no
	10-Withdrawn by parent request and no longer enrolled	no	no	no	no	no	no	no	no
	11-Expelled but still receiving services	no	no	no	no	no	no	no	no
	12-Exit from one need but continuing in another	no	no	no	no	no	no	no	no
	13-End of school year	no	yes	yes	yes	yes	yes	yes	yes

Note that 'J' service code participations cannot be validated against Year End code as they are private school students and do not receive ADM

		Withdrawal Codes													
		W1-Transfer	W2-Illness	W3-Expelled or long-term suspension	W4-Absence status unknown	W5-Dropout	W6-Age	W7-Graduated	W8-Deceased	W9-Transfer to be home-taught	W10-Transfer to detention	W11-GED	W12-Vocational school	W13-Completed (AIMS)	
SPED Exit Codes	1-Transfer to regular education	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
	2-Graduated	no	no	no	no	no	no	yes	no	no	no	no	no	no	
	3- Reached maximum age	no	no	no	no	no	yes	no	no	no	no	no	no	no	
	4-Died	no	no	no	no	no	no	no	yes	no	no	no	no	no	
	5-Moved, known to be continuing	yes	no	no	no	no	no	no	no	yes	yes	no	no	no	
	7-Dropout	no	yes	yes	yes	yes	no	no	no	no	no	yes	yes	yes	
	8-Transition to kindergarten	yes	no	no	no	no	no	no	no	no	no	no	no	no	
	9-Ends one SPED service but starts another	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	10-Withdrawn by parent request and no longer enrolled	no	yes	no	no	no	yes	no	no	yes	no	no	no	no	no
	11-Expelled but still receiving services	no	no	yes	no	no	no	no	no	no	no	no	no	no	no
	12-Exit from one need but continuing in another	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	13-End of school year	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Note that service code J participations cannot be validated against withdrawal codes as they are private school students and do not receive ADM.

Matrix Changes



## RE-ENROLLING IN SPECIAL EDUCATION SERVICES

If the student re-enrolls in the school or special education services after the special education service has been marked as withdrawn, the enrollment record needs to be entered into the Special Ed Student Services screen. Since all of the special education services records have to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new enrollment record as well.



**Note:** Only one record with the same need and service may be entered into the student’s special education record. The same need may be entered only if the student is receiving a different service. To enter a different need, or the same need with a different service, follow the instructions for Adding Special Education Services in this chapter. Otherwise, if the student is re-enrolling with the same need and service, follow the instructions in this section.

To re-enroll a student in the same need and service:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.49 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.

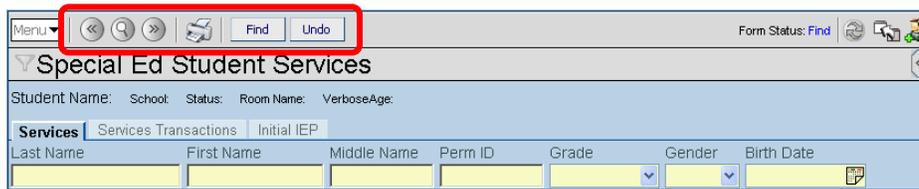


Figure 4.50 – Special Ed Student Services Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.51 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 4.52 – Current Form Status

- Click on the **Show Detail** button in the Special Ed Student Services screen.

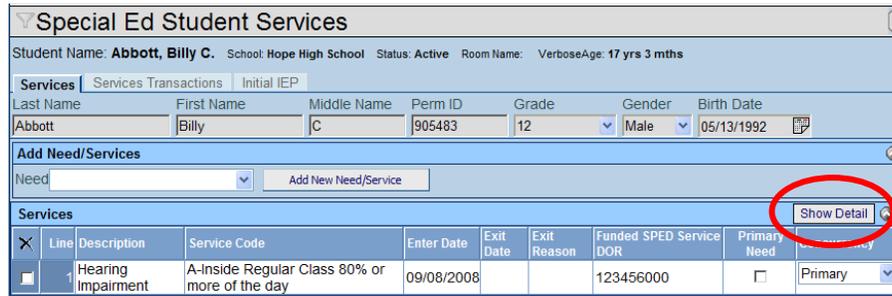


Figure 4.53 – Special Ed Student Services Screen, Show Detail button

- Click on the **need/service line** on the left-hand side of the screen in which to re-enroll the student.

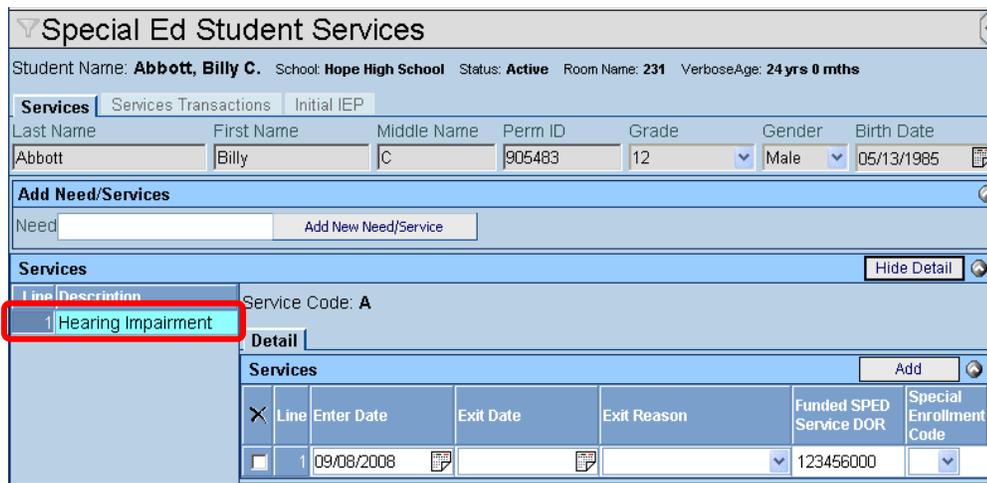


Figure 4.54 – Special Ed Student Services, Detailed Screen

- Click the **Add** button in the Detail section.

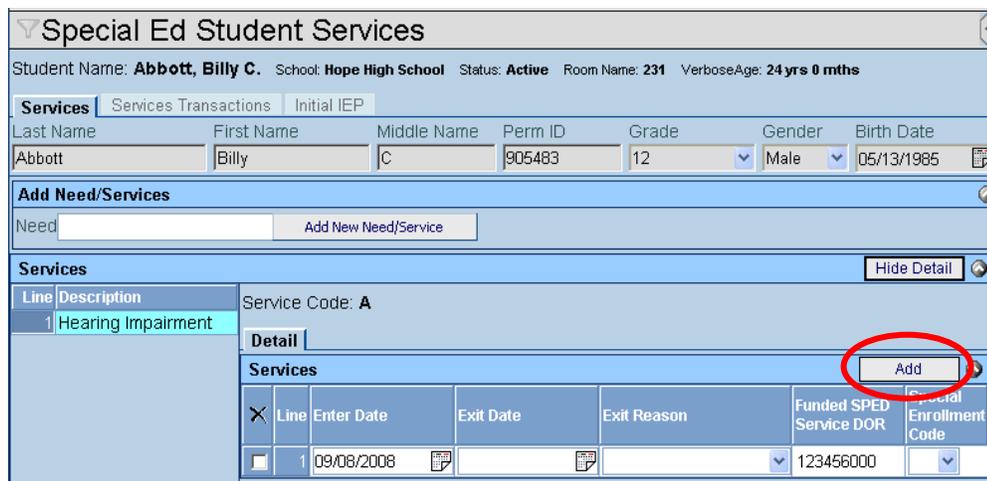


Figure 4.55 – Special Ed Student Services, Detailed Screen, Add button

- In the blank line that appears, edit the **Enter Date** so that it reflects the student’s enrollment date. By default it enters today’s date. The date should be entered in the format M/D/YY or it may be selected by clicking the Calendar  button.

Figure 4.56 – Special Ed Student Services, Detailed Screen, Adding Enrollment

- Enter the CTD code of the district in the **Funded SPED Service DOR** box.
- If the student entered the school with a Certificate of Educational Convenience or through Open Enrollment, select the **Special Enrollment Code** from the drop-down.
- Click the **Save** button at the top of the screen to save the new enrollment.
- If the student receives multiple services, they must be re-enrolled in each service by repeating the steps above.

## SCREENING SPECIAL ED TRANSACTIONS

Synergy SIS can automatically create the transaction records that need to be uploaded to the SAIS system at the State of Arizona. This is configured on the District Setup screen. For more information about setting this up, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*. To screen the transactions:

- Click the **Services Transactions** tab of the Special Ed Student Services screen.

Figure 4.57 – Services Transactions tab of the Special Ed Student Services Screen

- Each transaction is listed on a separate line. Values that are shown in **Bold** are calculated by Synergy SIS.
- If there is an error in the transaction that needs to be fixed, the line is highlighted and the error message is shown in the **Error** column. Errors are fixed by editing the data entered on the Services tab according to the instructions in the Error message.

Transactions listed here may not have been uploaded to the state yet. This screen shows all transactions, not just those uploaded. Which records have been uploaded depends on a number of factors, including the error status of the transactions, the date of the last submission, and if Synergy SIS has been setup to automatically create the transactions.

## DELETING SPECIAL EDUCATION SERVICE RECORDS

To completely remove a special education service record:

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 4.58 – Checking Current Focus

- Find the student for which to enter the special education services using either the **Scroll or Find** method.

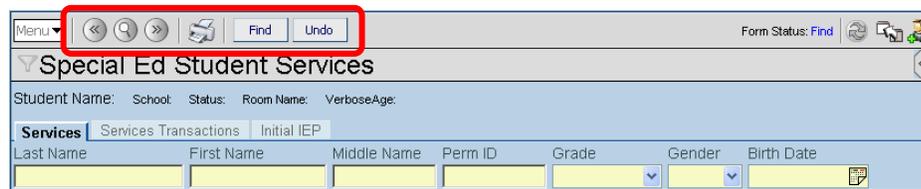


Figure 4.59 – Special Ed Student Services Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 4.60 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 4.61 – Current Form Status

- Click on the **Show Detail** button on the Services tab of the Special Education Services screen.

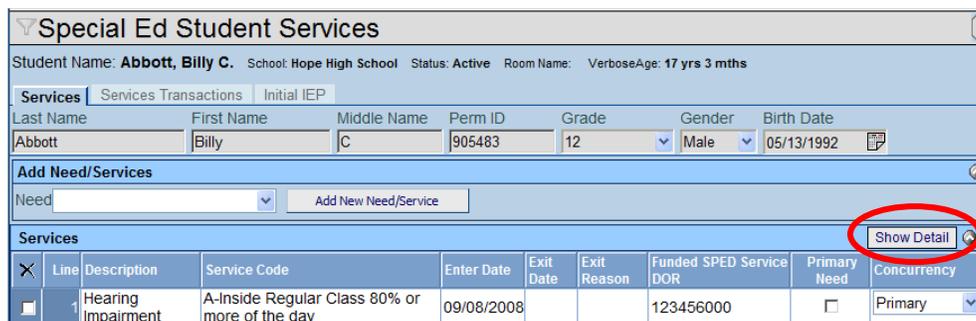


Figure 4.62 – Special Ed Student Services Screen, Show Detail Button

- Click on the **need/service line** on the left-hand side of the screen that needs to be deleted.

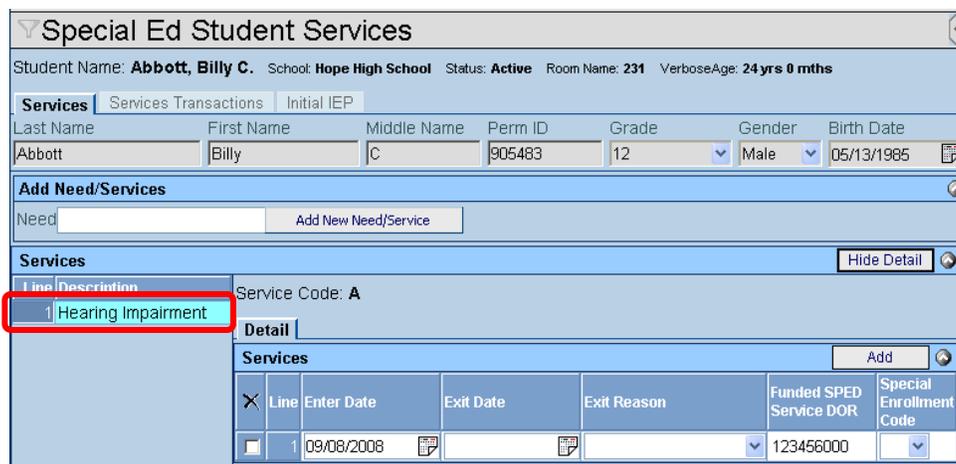


Figure 4.63 – Special Ed Student Services, Detailed Screen

- Click on the **X** column of all enrollment records in the detailed area on the right.

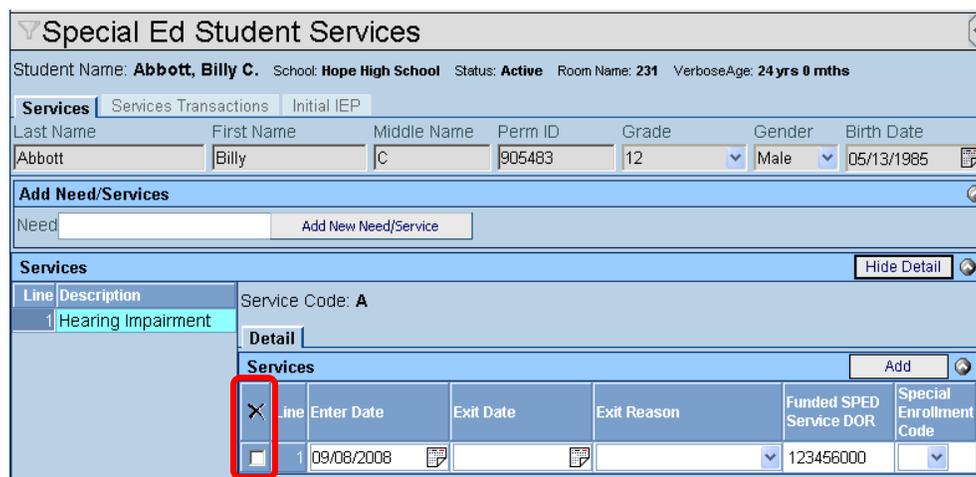


Figure 4.64 – Special Ed Student Services, Detailed Screen

- Click the **Save** button at the top of the screen to delete the record, or click the **Undo** button to cancel the operation without deleting the record.

# MENU OPTIONS

At the top of the Special Ed Student Services screen, a **Menu** button provides access to additional information regarding the student’s special education records.



Figure 4.65 – Special Ed Student Services Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Special Ed Student Services** – the Audit Trail History screen lists all of the changes made to the student’s records, what was changed, who changed it, and the date and time the change was made. It is the same audit trail report available through the Student screen. Since the Special Education information is stored in a grid, it is not yet available for tracking via the audit detail report.

Audit Trail History							
Properties							
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name	Date Time Stamp
1	Student	HomeLanguage	Update	01	00	Wilson, Rob	12/08/2008 08:20:02
2	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/24/2008 15:45:41
3	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:31
4		GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:31
5	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:22
6		GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:22
7	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:43
8		GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:43
9	Student	GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:36
10		HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:36

Figure 4.66 – Audit Trail History for Special Ed Student Services

The **Print** button at the top of the screen may be used to print the information on the Special Ed Student Services screen.



Figure 4.67 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Special Ed Student Services

Student Name: **Abbott, Billy C.** School: Hope High School Status: Active Room Name: 231 VerboseAge: 24 yrs 0 mths

Services | Services Transactions | Initial IEP

Last Name	First Name	Middle Name	Perm ID	Grade	Gender
Abbott	Billy	C	905483	12	Male

Add Need/Services

Need: [Dropdown] Add New Need/Service

X	Line	Description	Service Code	Enter Date	Exit Date	Exit Reason	Funded SPED Service DOR	PrimaryNeed
<input type="checkbox"/>	1	Hearing Impairment	A-Inside Regular Class 80% or more of the day	09/08/2008			123456000	<input type="checkbox"/>

Figure 4.68 – Printed Special Ed Student Services Screen

# Chapter Five: ELL

In this chapter, the following topics are covered:

- ▶ Adding, modifying and deleting ELL Assessments
- ▶ Adding ELL program records
- ▶ Withdrawing & re-enrolling a student in the ELL program
- ▶ Entering & deleting an ELL waiver
- ▶ Recording follow-up and parent contact notes

## OVERVIEW OF THE ENGLISH LANGUAGE LEARNERS PROGRAM

For any student that indicates that their home language is other than English, an English language proficiency exam (AZELLA) must be administered within 30 days of enrollment. Prior to FY2009 (the state's fiscal year 2009, school year 2008-09), the results of these tests must be entered into Synergy SIS so that they can be reported to the state. After FY2009, the test results are returned directly to the state by the company processing the tests and the tests do not have to be recorded in Synergy SIS. However, districts may continue to enter the test results to maintain their own records of the assessment results.

If the student is classified as anything but proficient in English on the test, the student must be placed in an ELL program or their parent must sign a waiver. The program or waiver information must be recorded in Synergy SIS so that it can be uploaded to the state.

The English Language Learners screen can also keep a record of any communication with the student's parents regarding the student's ELL participation, and it can record any follow-up communication.

## ADDING A ELL ASSESSMENT RECORD

To add a record of a completed assessment of a student:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

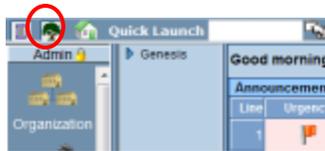


Figure 5.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 5.2 – Synergy SIS Folder



Figure 5.3 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 5.4 – Student Programs Folder



Figure 5.5 – Student Programs Folder Expanded

- Click on the **English Language Learners** screen, and the screen appears in the content pane on the right-side of the screen.

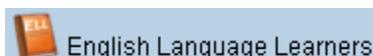


Figure 5.6 – English Language Learners Screen Icon

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.7 – Checking Current Focus

- Find the student for which to enter the record using either the **Scroll or Find** method.



Figure 5.8 – English Language Learners Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.9 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 5.10 – Current Form Status

- Select the test to add from the **ELL Test** drop-down list, and click the **Add** button. The year of the test may be a year previous to the current school year. The year of

the test simply indicates the year the test definition was created, and it does not have to match the current school year.

Figure 5.11 – English Language Learners Screen, Assessment Tab

- The Student ELL Test Detail screen pops-up. Enter the date the student completed the assessment in the **Admin Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button. By default it enters today's date.

Line	Part Number	Part Name	Performance Level	Raw Score
1	1	Oral	Basic	354
2	2	Reading	Emergent	259
3	3	Writing	Pre-Emergent	178
4	4	Overall	Emergent	245

Figure 5.12 – Student ELL Test Detail Screen, Adding

- To associate the test with a specific school, such as the school that administered the test, click on the **gray arrow** next to the **School Name**. Find the school in the Find School screen that pops-up, and click **Select**.
- For each part listed (Oral, Reading, Writing & Overall), select the **Performance Level** achieved from the Performance Level drop-down list and enter the score achieved in the **Raw Score** column. The performance levels are Pre-Emergent, Emergent, Basic, Intermediate or Proficient.

**Note:** Acceptable test scores fall in between 100-997. If the student did not complete that part of the test, enter 998. If the student is classified as Continuing FEP (Fluent English Proficient), enter 999.

- Click the **Save** button at the top of the screen to save the record.

Figure 5.13 – English Language Learners Screen, New Record Added

13. Once the assessment has been saved, two additional pieces of information need to be added. Select the overall **Result Code** from the drop-down list. The result code indicates the student's overall ELL classification. Possible values are:
- **English Language Learner (ELL)** – overall result of test is not proficient.
  - **ELL After Reclassification (ELLAR)** – student was previously classified as proficient, but the latest test results show the student is not proficient.
  - **Initial Fluent English Proficient (IFEP)** – the test results show the student is proficient in English.
  - **Reclassified Fluent English Proficient (RFEP)** – student was previously classified as not proficient, but the latest test results show the student is proficient.
  - **Continuing Fluent English Proficient (CFEP)** – the student was previously classified as proficient and the latest test results show the student is still proficient in the English language.
14. Before FY2009, if the assessment should not be reported to SAIS, check the box in the column **Exclude From SAIS**. From FY2009 on, assessment results are no longer reported to the state.
15. Click the **Save** button at the top of the screen to save the changes.

## MODIFYING AN ELL ASSESSMENT

To modify an existing ELL Assessment:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.14 – Checking Current Focus

2. Find the student's ELL record using either the **Scroll or Find** method.



Figure 5.15 – English Language Learners Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.16 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.

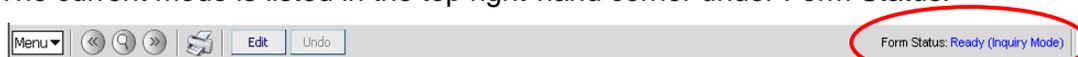


Figure 5.17 – Current Form Status

- Click in the fields of the test to modify, and make the necessary changes.

English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: Staff Name:

Assessment | ELL | ELL Transactions | Waiver History | Follow Up | Parent Contact

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

Add Test To Student

ELL Test:  Add

ELL Assessment

Line	Admin Date	Test Name	Grade	Result Code	Oral	Reading	Writing	Overall	Test Details	School Name	Exclude From
1	09/30/2009	ELL - 2008	12		354	259	178	245	Show Details		<input type="checkbox"/>

Figure 5.18 – English Language Learners Screen, Modifying

- Click the **Save** button at the top of the screen to save the changes.
- To modify the performance levels on each part of the test, click on **Show Details**.

English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: Staff Name:

Assessment | ELL | ELL Transactions | Waiver History | Follow Up | Parent Contact

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

Add Test To Student

ELL Test:  Add

ELL Assessment

Line	Admin Date	Test Name	Grade	Result Code	Oral	Reading	Writing	Overall	Test Details	School Name	Exclude From SAIS
1	09/30/2009	ELL - 2008	12		354	259	178	245	Show Details		<input type="checkbox"/>

Figure 5.19 – English Language Learners Screen, Show Details

- The Student ELL Test Detail screen pops-up. Make the necessary modifications, and click the **Save** button at the top of the screen to save the changes.

Student ELL Test Detail

Student Name: **Abbott, Billy C.** Test Name and Year: **ELL - 2008**

Test Parts

Admin Date: 09/30/2009 Grade: 12 School Name:

Line	Part Number	Part Name	Performance Level	Raw Score
1	1	Oral	Basic	354
2	2	Reading	Emergent	259
3	3	Writing	Pre-Emergent	178
4	4	Overall	Emergent	245

Figure 5.20 – Student ELL Test Detail Screen, Modifying

# DELETING AN ELL ASSESSMENT

To completely remove an existing ELL Assessment:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.21 – Checking Current Focus

2. Find the student for which to delete the record using either the **Scroll or Find** method.



Figure 5.22 – English Language Learners Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.23 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 5.24 – Current Form Status

4. Check the box in the **X** column of the test to delete.

English Language Learners											
Student Name: <b>Abbott, Billy C.</b> School: <b>Hope High School</b> Room Name: Staff Name:											
Assessment   ELL   ELL Transactions   Waiver History   Follow Up   Parent Contact											
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender					
Abbott	Billy	C		905483	12	Male					
Add Test To Student											
ELL Test: <input type="text"/> Add											
ELL Assessment											
X	Line	Admin Date	Test Name	Grade	Result Code	Oral	Reading	Writing	Overall	Test Details	Exclude From SAIS
<input checked="" type="checkbox"/>	1	09/30/2009	ELL - 2008	12		354	259	178	245	Show Details	<input type="checkbox"/>

Figure 5.25 – English Language Learners Screen, Deleting

5. Click the **Save** button at the top of the screen to remove the record.

## RECORDING PARTICIPATION IN THE ELL PROGRAM

To record the student's participation in the ELL program:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

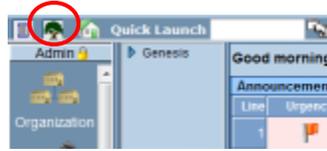


Figure 5.26 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 5.27 – Synergy SIS Folder



Figure 5.28 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 5.29 – Student Programs Folder

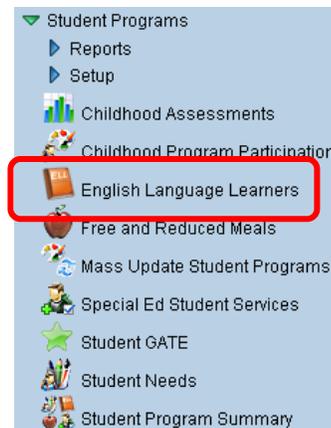


Figure 5.30 – Student Programs Folder Expanded

4. Click on the **English Language Learners** screen, and the screen appears in the content pane on the right-side of the screen.

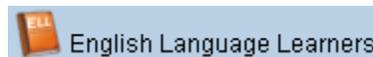


Figure 5.31 – English Language Learners Screen Icon

5. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.32 – Checking Current Focus

6. Find the student for which to enter the program using either the **Scroll or Find** method.



Figure 5.33 – English Language Learners Screen

7. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.34 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 5.35 – Current Form Status

8. Click on the **ELL** tab of the English Language Learners screen.

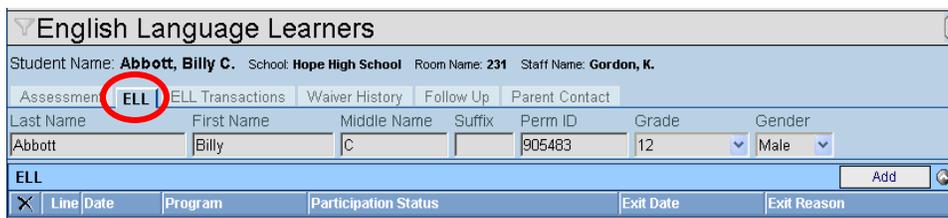


Figure 5.36 – English Language Learners Screen, ELL Tab

9. Click the **Add** button in the ELL section.

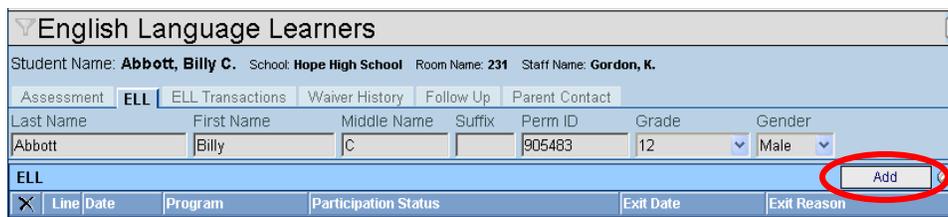


Figure 5.37 – English Language Learners Screen, ELL Tab, Add button

10. A new line appears in the ELL grid. Enter the date the student will begin participating the program in the **Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.

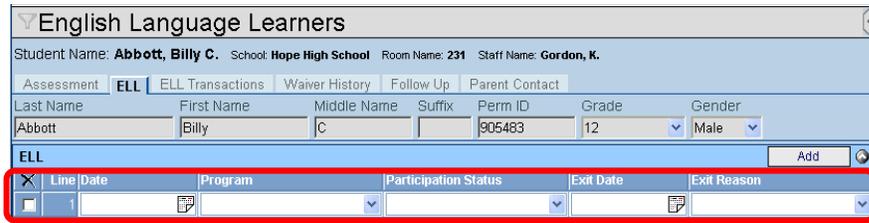


Figure 5.38 – English Language Learners Screen, ELL Tab, Adding

11. Select the type of program from the **Program** drop-down list. The possible options are: Structured or Sheltered English Immersion (SEI), Bilingual/Dual Language with Waiver 1, Bilingual/Dual Language with Waiver 2, Bilingual/Dual Language with Waiver 3, or Individual Language Learner Plan (ILLP)
12. Select if the student is New or Continuing in the program from the **Participation Status** drop-down list.
13. Click the **Save** button at the top of the screen to save the record.

## WITHDRAWING FROM THE ELL PROGRAM

When a student is no longer participating in a program, the exit date and reason must be recorded on the ELL tab of the English Language Learners screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the programs at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*.

To record the student’s withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.39 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 5.40 – English Language Learners Screen

- Once the student's records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.41 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 5.42 – Current Form Status

- Click on the **ELL** tab of the English Language Learners screen.

 The 'English Language Learners' screen for student 'Abbott, Billy C.' at 'Hope High School'. The 'ELL' tab is selected and circled in red. Below the student information, there is a table with columns: Line, Date, Program, Participation Status, Exit Date, and Exit Reason.

Figure 5.43 – English Language Learners Screen, ELL Tab

- Enter the date the student withdrew in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.

 The same 'English Language Learners' screen as in Figure 5.43. The 'Exit Date' and 'Exit Reason' columns in the table are highlighted with a red box. The 'Exit Date' field contains '09/05/2008' and the 'Exit Reason' field contains 'N-New'.

Figure 5.44 - English Language Learners Screen, ELL Tab, Exit Date &amp; Reason

- Select the reason the student is withdrawing from the program from the **Exit Reason** drop-down list. The possible exit reasons are: Reclassified as FEP by Reassessment, Withdrawn from school, Withdrawn by parent request, Transferred to a different program, Withdrawn due to SPED Criteria, and Transferred to Different Track.
- Click the **Save** button at the top of the screen.



**Tip:** All students must be marked as withdrawn from programs at the end of the year using the Withdrawn from School code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

## RE-ENROLLING IN THE ELL PROGRAM

If the student re-enrolls in the school or in the ELL program after the program has been marked as withdrawn, a new record needs to be entered into the ELL tab of the English Language Learns screen. Since the student's ELL program has to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new record for the program as well.

To re-enroll the student in the program, just add a new record with the new date following the instructions in the Recording Participation in the ELL Program section in this chapter.

## DELETING ELL PROGRAM RECORDS

To completely remove an ELL program record:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.45 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 5.46 – English Language Learners Screen

3. Once the student's records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.47 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 5.48 – Current Form Status

4. Click on the **ELL** tab of the English Language Learners screen.

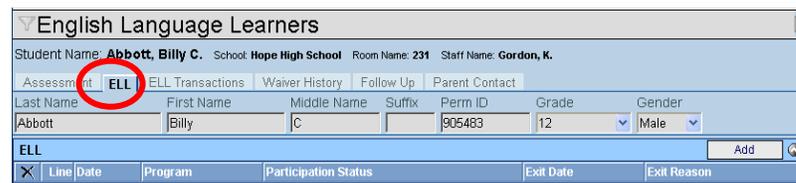


Figure 5.49 – English Language Learners Screen, ELL Tab

5. Click on the **X** column of all enrollment records in the detailed area on the right.

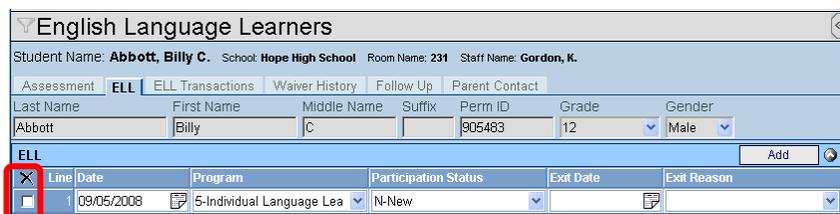


Figure 5.50 – English Language Learners Screen, ELL Tab

6. Click the **Save** button at the top of the screen to delete the record.

## SCREENING ELL TRANSACTIONS

Synergy SIS can automatically create the transaction records that need to be uploaded to the SAIS system at the State of Arizona. This is configured on the District Setup screen. For more information about setting this up, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*. To screen the transactions:

1. Find the student’s records using either the **Scroll or Find** method.



Figure 5.51 – English Language Learners Screen

2. Click the **ELL Transactions** tab of the English Language Learners screen.

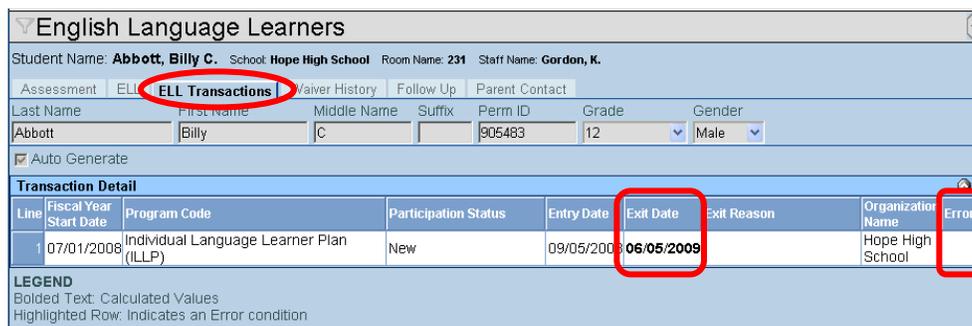


Figure 5.52 – ELL Transactions tab of the English Language Learners Screen

3. Each transaction is listed on a separate line. Values that are shown in **Bold** are calculated by Synergy SIS.
4. If there is an error in the transaction that needs to be fixed, the line is highlighted and the error message is shown in the **Error** column. Errors are fixed by editing the data entered on the Needs tab according to the instructions in the Error message.

Transactions listed here may not have been uploaded to the state yet. This screen shows all transactions, not just those uploaded. Which records have been uploaded depends on a number of factors, including the error status of the transactions, the date of the last submission, and if Synergy SIS has been setup to automatically create the transactions.

## ENTERING & DELETING A WAIVER

If the student’s parents do not want the student participating in ELL, they may sign a waiver. The waiver should be recorded on the Waiver History tab of the English Language Learners screen. Waivers, however, are not reported to the state. To record a waiver:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.53 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 5.54 – English Language Learners Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.55 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 5.56 – Current Form Status

4. Click on the **Waiver History** tab of the English Language Learners screen.

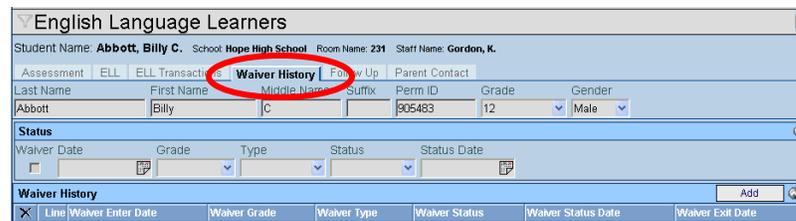


Figure 5.57 – English Language Learners Screen, Waiver History Tab

5. Click the **Add** button in the Waiver History grid.



Figure 5.58 – English Language Learners Screen, Waiver History Tab, Add Button

- A new line appears in the grid. Enter the date of the waiver in the **Waiver Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.

English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | **Waiver History** | Follow Up | Parent Contact

Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Suffix:  Perm ID: **905483** Grade: **12** Gender: **Male**

**Status**

Waiver Date:  Grade:  Type:  Status:  Status Date:

**Waiver History**

X	Line	Waiver Enter Date	Waiver Grade	Waiver Type	Waiver Status	Waiver Status Date	Waiver Exit Date
<input type="checkbox"/>	1						

Figure 5.59 – English Language Learners Screen, Waiver History Tab, Adding

- Select the grade level of the student from the **Waiver Grade** drop-down.
- Choose the **Waiver Type** from the drop-down list. Since this is not reported to the state, these are district-created values but they generally list the three types of waivers allowed by the state – My child already knows English, My child has special individual needs, or My child is 10 years or older.
- Select the **Waiver Status** from the drop-down list. Since this is not reported to the state, these are district-created values but they generally list if the waiver was denied or approved.
- Enter the date the waiver status was changed in the **Waiver Status Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- If the waiver is withdrawn by the parents or the student withdraws from school, enter the Waiver Exit Date. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- Click the **Save** button at the top of the screen to save the waiver.

To delete a waiver:

- Click in the box in the **X** column in front of the waiver to be deleted.

English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | **Waiver History** | Follow Up | Parent Contact

Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Suffix:  Perm ID: **905483** Grade: **12** Gender: **Male**

**Status**

Waiver Date: **09/05/2008** Grade: **12** Type: **My child is 10** Status: **Granted** Status Date: **09/05/2008**

**Waiver History**

X	Line	Waiver Enter Date	Waiver Grade	Waiver Type	Waiver Status	Waiver Status Date	Waiver Exit Date
<input checked="" type="checkbox"/>	1	09/05/2008	12	My child is 10	Granted	09/05/2008	

Figure 5.60 – English Language Learners Screen, Waiver History Tab, Deleting

- Click the **Save** button at the top of the screen.

# RECORDING FOLLOW-UP

To record a note regarding a follow up action taken with regards to the student's ELL assessment or participation in the ELL program:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.61 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 5.62 – English Language Learners Screen

3. Once the student's records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.63 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.

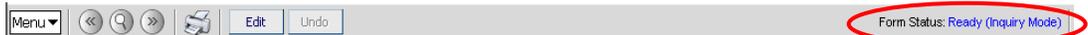


Figure 5.64 – Current Form Status

4. Click on the **Follow Up** tab of the English Language Learners screen.



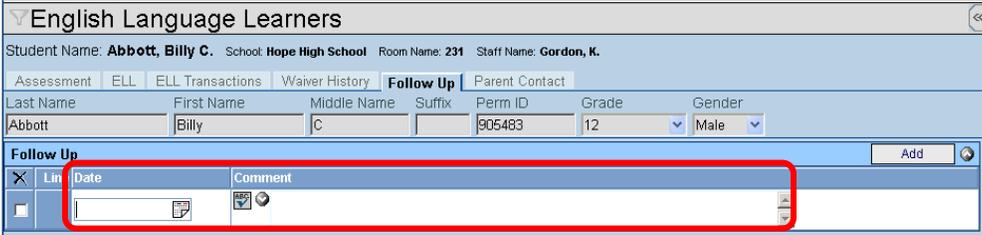
Figure 5.65 – English Language Learners Screen, Follow Up Tab

5. Click the **Add** button in the Follow Up grid.



Figure 5.66 – English Language Learners Screen, Follow Up Tab, Add Button

- A new line appears in the grid. Enter the date of the follow up in the **Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.



English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | Waiver History | **Follow Up** | Parent Contact

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

**Follow Up** Add

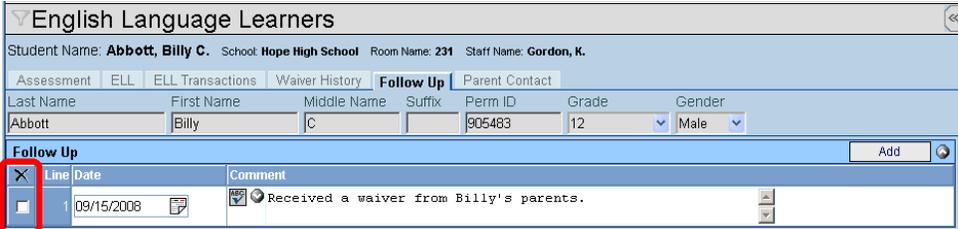
X	Line	Date	Comment
<input type="checkbox"/>			

Figure 5.67 – English Language Learners Screen, Follow Up Tab, Adding

- Enter a note regarding the follow-up action in the **Comment** field. The comments may be checked for spelling by clicking the SpellCheck  button.
- Click the **Save** button at the top of the screen to save the follow-up note.

To delete a follow-up note:

- Click in the box in the **X** column in front of the follow-up note to be deleted.



English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | Waiver History | **Follow Up** | Parent Contact

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

**Follow Up** Add

X	Line	Date	Comment
<input type="checkbox"/>		09/15/2008	Received a waiver from Billy's parents.

Figure 5.68 – English Language Learners Screen, Follow Up Tab, Deleting

- Click the **Save** button at the top of the screen.

# RECORDING PARENT CONTACT

To record a note regarding contact made with the student’s parents regarding their ELL participation or their ELL assessment:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 5.69 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 5.70 – English Language Learners Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 5.71 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 5.72 – Current Form Status

4. Click on the **Parent Contact** tab of the English Language Learners screen.



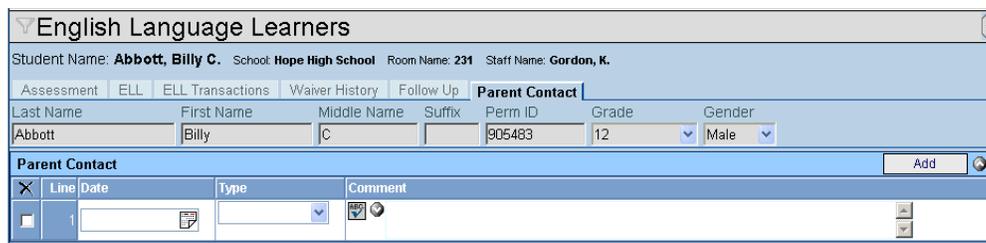
Figure 5.73 – English Language Learners Screen, Parent Contact Tab

5. Click the **Add** button in the Parent Contact grid.



Figure 5.74 – English Language Learners Screen, Parent Contact Tab, Add Button

- A new line appears in the grid. Enter the date of the parent contact in the **Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.



English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | Waiver History | Follow Up | **Parent Contact**

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

**Parent Contact** Add

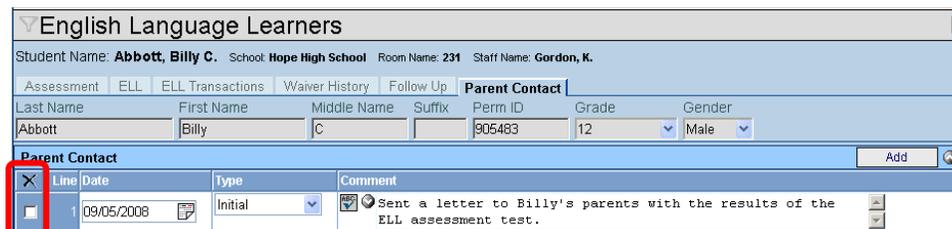
X	Line	Date	Type	Comment
<input type="checkbox"/>	1			

Figure 5.75 – English Language Learners Screen, Waiver History Tab, Adding

- Choose the **Type** of contact from the drop-down list. Since this is not reported to the state, these are district-created values but they generally list such types as Initial or Annual.
- Enter a note regarding the parent contact in the **Comment** field. The comments may be checked for spelling by clicking the SpellCheck  button.
- Click the **Save** button at the top of the screen to save the record.

To delete a note regarding parent contact:

- Click in the box in the **X** column in front of the note to be deleted.



English Language Learners

Student Name: **Abbott, Billy C.** School: **Hope High School** Room Name: **231** Staff Name: **Gordon, K.**

Assessment | ELL | ELL Transactions | Waiver History | Follow Up | **Parent Contact**

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	Male

**Parent Contact** Add

X	Line	Date	Type	Comment
<input type="checkbox"/>	1	09/05/2008	Initial	Sent a letter to Billy's parents with the results of the ELL assessment test.

Figure 5.76 – English Language Learners Screen, Parent Contact Tab, Deleting

- Click the **Save** button at the top of the screen.

## MENU OPTIONS

At the top of the English Language Learners screen, a **Menu** button provides access to additional information regarding the student's records.

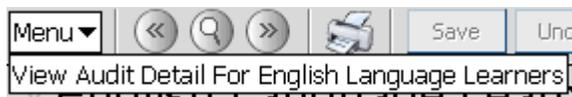


Figure 5.77 – English Language Learners Screen, Menu Options

The option available under the Menu button is:

- Screen Audit Detail For English Language Learners** – the Audit Trail History screen lists all of the changes made to the student's records, what was changed, who changed it, and the date and time the change was made. It is the same audit

trail report available through the Student screen. Since the ELL information is stored in a grid, it is not yet available for tracking via the audit detail report.

Audit Trail History							
Properties							
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name	Date Time Stamp
1	Student	HomeLanguage	Update	01	00	Wilson, Rob	12/08/2008 08:20:02
2	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/24/2008 15:45:41
3	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:31
4		GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:31
5	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	11/12/2008 23:24:22
6		GridCode	Update	741B	741B	Wilson, Rob	11/12/2008 23:24:22
7	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:43
8		GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:43
9	Student	GridCode	Update	741B	741B	Wilson, Rob	10/22/2008 08:17:36
10		HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/22/2008 08:17:36
11	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	10/15/2008 16:49:31
12	Student	GridCode	Update	741B	741B	Wilson, Rob	06/03/2008 21:40:50
13		HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:40:50
14	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:40:50
15	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:39:56
16	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:39:56
17		GridCode	Update	741B	741B	Wilson, Rob	06/03/2008 21:39:56
18	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:37:57
19	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob	06/03/2008 21:37:57
20		GridCode	Update	99999	99999	Wilson, Rob	06/03/2008 21:37:57

Figure 5.78 – Audit Trail History for English Language Learners

The **Print button** at the top of the screen may be used to print the information on the ELL screen.



Figure 5.79 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Menu [Navigation Icons] Save Undo [Warning Icon] Form Status: Ready (Update Mode) [Help Icons]

### English Language Learners

Student Name: **Abbott, Billy C.** School: Hope High School Room Name: 231 Staff Name: Gordon, K.

**Assessment** | ELL | ELL Transactions | Waiver History | Follow Up | Parent Contact

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Ge
Abbott	Billy	C		905483	12	Ma

**Add Test To Student**

ELL Test [Dropdown] [Add]

**ELL Assessment**

X	Line	Admin Date	Test Name	Grade	Result Code	Oral	Reading	Writing	Overall
<input type="checkbox"/>	1	09/05/2008	ELL - 2006	12	English Language Learner (ELL)	523	758	397	518

Figure 5.80 – Printed English Language Learners Screen

# Chapter Six: CHILDHOOD PROGRAMS

In this chapter, the following topics are covered:

- ▶ Adding childhood assessment records
- ▶ Modifying & deleting childhood assessment records
- ▶ Adding childhood program participation records
- ▶ Withdrawing & re-enrolling a student in a childhood program
- ▶ Screening program transactions
- ▶ Deleting program records

## OVERVIEW OF CHILDHOOD PROGRAMS

Childhood Programs are used by pre-schools or other pre-kindergarten programs in the state of Arizona. Recordkeeping for the Childhood Programs requires two sets of records. Prior to FY2012 (the state's fiscal year 2012, school year 2011-12), the results of these tests must be entered into Synergy SIS so that they can be reported to the state. After FY2012, the test results are returned directly to the state by the company processing the tests and the tests do not have to be recorded in Synergy SIS. However, districts may continue to enter the test results to maintain their own records of the assessment results. In addition to the test records, the information regarding the programs in which the student is participating must be entered and submitted to the state as well. This chapter outlines how to add assessment records as well as the program records for the Childhood Programs.

## ADDING A CHILDHOOD ASSESSMENT

While six different tests may be used to monitor student progress in a childhood program, each district standardizes on one test to use during the assessment process. The Childhood Assessment screen is then customized to record the information for the selected test. For instructions on how to customize this screen to match the test selected, please refer to the section on Early Childhood Education (ECE) Reporting in Chapter Three of the *State of Arizona Data Reporting Administrator Guide*. To add a record of a completed assessment of a student:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

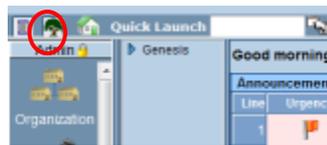


Figure 6.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 6.2 – Synergy SIS Folder

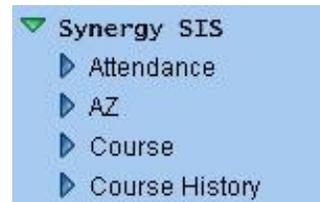
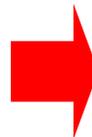


Figure 6.3 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 6.4 – Student Programs Folder

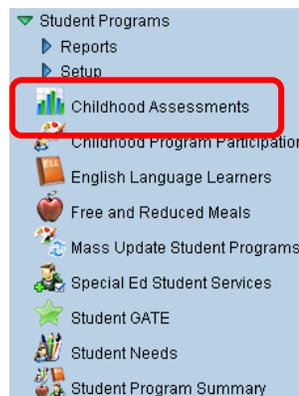


Figure 6.5 – Student Programs Folder Expanded

- Click on the **Childhood Assessments** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 6.6 – Childhood Assessments Screen Icon

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.7 – Checking Current Focus

- Find the student for which to enter the record using either the **Scroll or Find** method.



Figure 6.8 – Childhood Assessments Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.9 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 6.10 – Current Form Status

- Select the test to add from the **Child Assessment Test** drop-down list, and click the **Add** button.

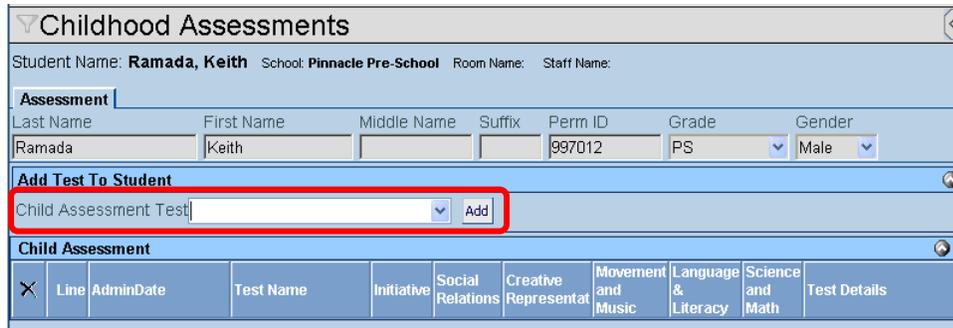


Figure 6.11 – Childhood Assessments Screen, Adding

- The Child Assessment Test Detail screen pops-up. Enter the date the student completed the assessment in the **Admin Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button. By default it enters today's date.

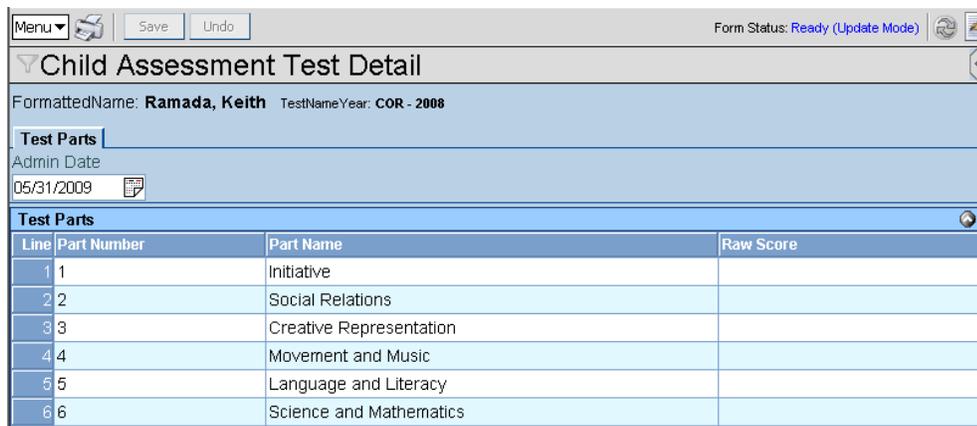


Figure 6.12 – Child Assessment Test Detail Screen, Adding

- For each part listed, enter the score achieved in the **Raw Score** column. The names and number of parts differ depending on the test used at the district.
- Click the **Save** button at the top of the screen to save the record.

## MODIFYING A CHILDHOOD ASSESSMENT

To modify an existing childhood assessment:

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.13 – Checking Current Focus

- Find the student for which to modify the record using either the **Scroll** or **Find** method.



Figure 6.14 – Childhood Assessments Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.15 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 6.16 – Current Form Status

- Click in the fields of the test to modify, and make the necessary changes.

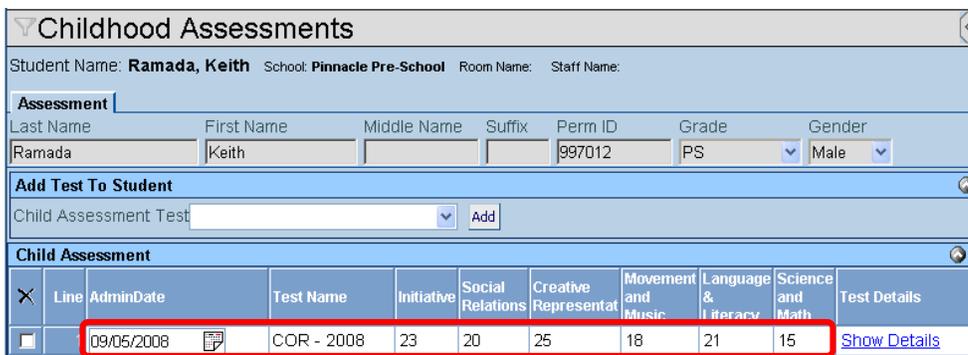


Figure 6.17 – Childhood Assessment Screen, Modifying

- Click the **Save** button at the top of the screen to save the changes.

The test may also be modified by clicking on **Show Details**.

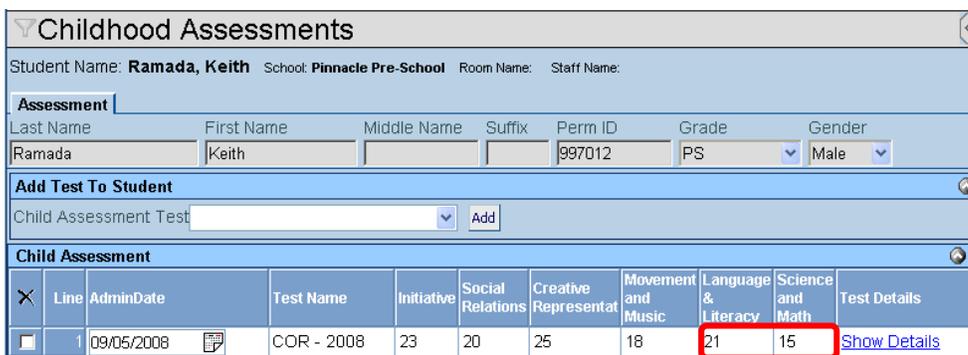


Figure 6.18 – Childhood Assessment Screen, Show Details

The Child Assessment Test Detail screen pops-up. Make the necessary modifications, and click the **Save** button at the top of the screen to save the changes.

Line	Part Number	Part Name	Raw Score
1	1	Initiative	23
2	2	Social Relations	20
3	3	Creative Representation	25
4	4	Movement and Music	18
5	5	Language and Literacy	21
6	6	Science and Mathematics	15

Figure 6.19 – Child Assessment Test Detail Screen, Modifying

## DELETING A CHILDHOOD ASSESSMENT

To completely remove an existing childhood assessment:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.20 – Checking Current Focus

2. Find the student for which to delete the record using either the **Scroll** or **Find** method.



Figure 6.21 – Childhood Assessments Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.22 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 6.23 – Current Form Status

4. Check the box in the **X** column of the test to delete.

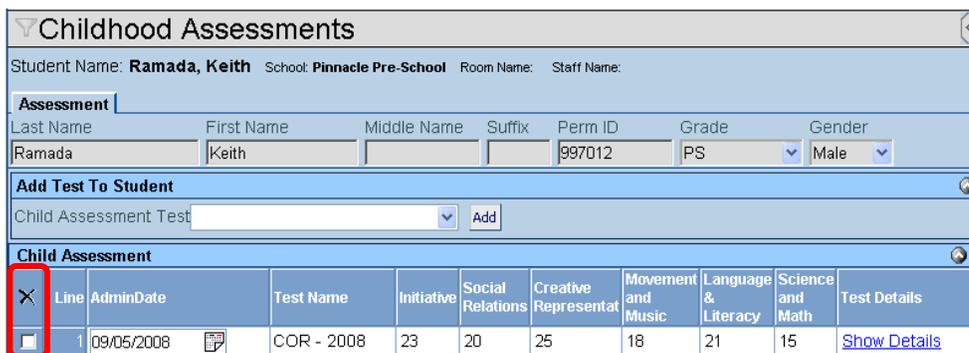


Figure 6.24 – Childhood Assessment Screen, Deleting

5. Click the **Save** button at the top of the screen to remove the record.

## ADDING A CHILDHOOD PROGRAM

Seven different programs are available to pre-school students such the Early Childhood Block Grant or the Title I Even Start Programs. More than one program may be recorded for each student. To record a student's participation in a program:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.



Figure 6.25 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 6.26 – Synergy SIS Folder

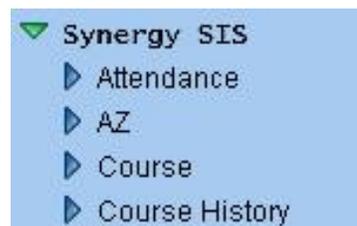


Figure 6.27 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.

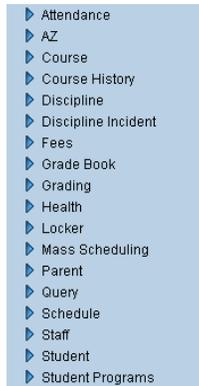


Figure 6.28 – Student Programs Folder



Figure 6.29 – Student Programs Folder Expanded

- Click on the **Childhood Program Participation** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 6.30 – Childhood Program Participation Screen Icon

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.31 – Checking Current Focus

- Find the student for which to enter the program using either the **Scroll** or **Find** method.



Figure 6.32 – Childhood Program Participation Screen

- Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.33 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 6.34 – Current Form Status

- Select the student's program from the **Childhood Programs** drop-down box, and click the **Add New Program** button.

The screenshot shows the 'Childhood Program Participation' screen for student Ramada, Keith. The student's information is displayed at the top: Student Name: Ramada, Keith; School: Pinnacle Pre-School; Status: Active; Room Name: ; VerboseAge: 3 yrs 8 mths. Below this, there are tabs for 'Programs' and 'Programs Transactions'. The 'Programs' tab is active, showing a table with columns: Last Name, First Name, Middle Name, Perm ID, Grade, Gender, Birth Date. The student's information is populated in the first row. Below the table, there is an 'Add Program' section with a dropdown menu for 'Childhood Programs' and an 'Add New Program' button. The dropdown menu is highlighted with a red box. Below this, there is a 'Services' section with a 'Show Detail' button and a table with columns: Line, Description, Code, Enter Date, Leave Date, CTDS, Family Income, Live In Household, Mother Emp Status, Father Emp Status, PPVT Exempt, Adult Education ID.

Figure 6.35 – Childhood Program Participation Screen, Adding

- The **Childhood Program Participation Add** screen pops-up.

The screenshot shows the 'Childhood Program Participation Add' screen. At the top, there are 'Save Service' and 'Close' buttons. Below them is the title 'Childhood Program Participation Add' and a tab for 'Add Program'. The 'Program' section is active, showing a table with columns: EnterDate, ExitDate, ProgramCTDS, FamilyIncome, Live In Household, MotherEmpStatus, FatherEmpStatus. The first row is populated with: EnterDate: 5/31/2009; ExitDate: ; ProgramCTDS: 123456000; FamilyIncome: ; Live In Household: ; MotherEmpStatus: ; FatherEmpStatus: . Below this, there are fields for Grade, PPVT Exempt, and Adult Education ID. The Grade field is populated with 'PS'.

Figure 6.36 – Childhood Program Participation Add Screen

- Enter the date the student will begin participating the program in the **Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button. By default it enters today's date.
- By default the CTD code of the current district in focus in Synergy SIS is entered in the **Program CTDS** box. If this student's programs are funded by another district enter the CTD code for that district in the Program CTDS box.



**Reference:** The CTD code is assigned to the district by the state of Arizona. For instructions on how to look up the CTD code of a district, see the Before Starting section in Chapter 1 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

- If the family's income is at or below federal poverty level standards, check the box labeled **Family Income**.
- Indicate which family members live in the house with the child by selecting the appropriate value from the **Live in Household** drop-down box.
- If the mother is employed, check the box labeled **MotherEmpStatus**. If the father is employed, check the box labeled **FatherEmpStatus**.
- Select the student's grade level from the **Grade** drop-down.
- If the child is participating in the Title I Even Start or State Family Literacy programs but is exempt from taking the PPVT III and PALS-PreK tests, select the exemption reason from the **PPVT Exempt** drop-down.

17. If the child is participating in the Title I Even Start or State Family Literacy programs which require other family members participate in an adult education program in conjunction with the child, enter the **Adult Education ID** of the program. This ID is assigned by the Arizona Dept. of Education.
18. Click the **Save Service** button at the top of the screen to save the record, or click Close to close the screen without saving.

## WITHDRAWING FROM A CHILDHOOD PROGRAM

When a student is no longer participating in a program, the exit date and reason must be recorded in the Childhood Program Participation screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the programs at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*.

To record the student’s withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.37 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 6.38 – Childhood Program Participation Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.39 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 6.40 – Current Form Status

- Click on the **Show Detail** button in the Childhood Program Participation screen.

Childhood Program Participation

Student Name: **Ramada, Keith** School: **Pinnacle Pre-School** Status: **Active** Room Name: VerboseAge: **3 yrs 8 mths**

**Programs** Programs Transactions

Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Birth Date
Ramada	Keith		997012	PS	Male	09/15/2005

**Add Program**

ChildHood Programs  Add New Program

**Services** Show Detail

Line	Description	Code	Enter Date	Leave Date	CTDS	Family Income	Live In Household	Mother Emp Status	Father Emp Status	PPVT Exempt	Adult Education ID
1	Early Childhood Block Grant	1	09/05/2008		123456000	<input checked="" type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Figure 6.41 – Childhood Program Participation Screen, Show Detail button

- Select the **program line** to withdraw by clicking on it on the left-hand side of the screen.

Childhood Program Participation

Student Name: **Ramada, Keith** School: **Pinnacle Pre-School** Status: **Active** Room Name: VerboseAge: **3 yrs 8 mths**

**Programs** Programs Transactions

Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Birth Date
Ramada	Keith		997012	PS	Male	09/15/2005

**Add Program**

ChildHood Programs  Add New Program

**Services** Hide Detail

**Detail**

Line	Enter Date	Exit Date	CTDS	Family Income	Live In Household	Mother Emp Status	Father Emp Status	PPVT Exempt	Adult Education ID
1	09/05/2008		123456000	<input checked="" type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Figure 6.42 – Childhood Program Participation, Detailed Screen

- Enter the date the student withdrew in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
- Click the **Save** button at the top of the screen.



**Tip:** All students must be marked as withdrawn from programs at the end of the year using the End of School Year code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

Note: Childhood Program Participation data may be modified in the same manner as explained for withdrawing from the program. Click on the Show Detail button, make the changes, and click on the Save button.

## RE-ENROLLING IN A CHILDHOOD PROGRAM

If the student re-enrolls in the school or in a program after the program has been marked as withdrawn, the enrollment record needs to be entered into the Childhood Program Participation screen. Since all of the student program records have to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new enrollment record for the program as well.



**Note:** Only one record with the same program may be entered into the student's record. To enter a different program, follow the instructions for Adding a Childhood Program in this chapter. Otherwise, if the student is re-enrolling with the same program, follow the instructions in this section.

To re-enroll a student in the same program:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.43 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 6.44 – Childhood Program Participation Screen

3. Once the student's records are located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.45 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 6.46 – Current Form Status

- Click on the **Show Detail** button in the Childhood Program Participation screen.



Figure 6.47 – Childhood Program Participation Screen, Show Detail button

- Click on the **program line** on the left-hand side of the screen in which to re-enroll the student.

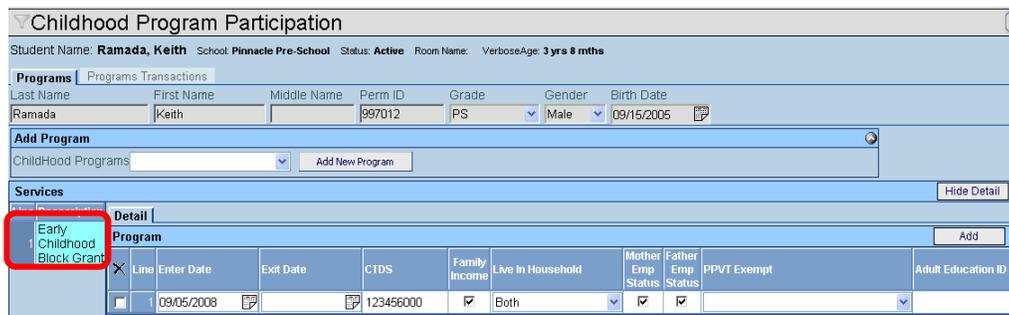


Figure 6.48 – Childhood Program Participation, Detailed Screen

- Click the **Add** button in the Detail section.

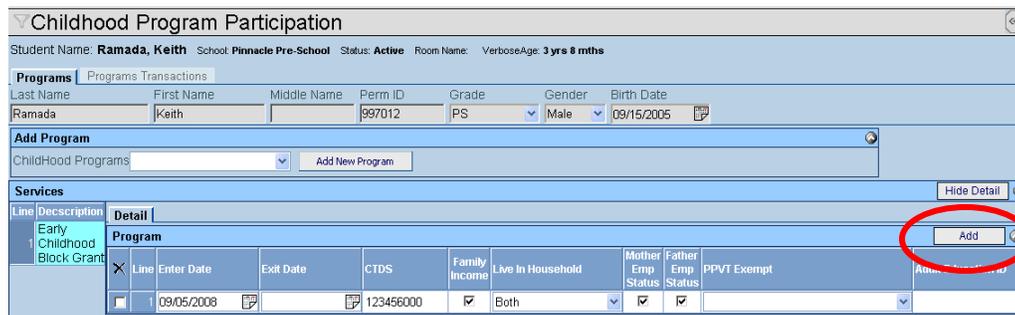
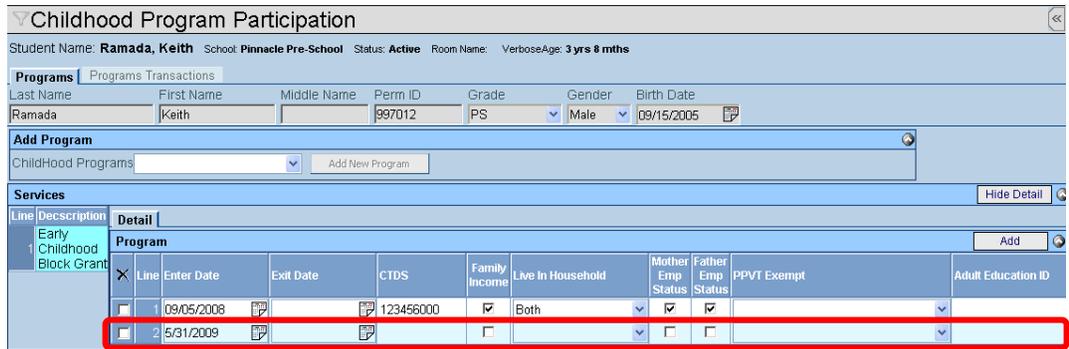


Figure 6.49 – Childhood Program Participation, Detailed Screen, Add button

7. In the blank line that appears, edit the **Enter Date** so that it reflects the student's enrollment date. By default it enters today's date. The date should be entered in the format M/D/YY or it may be selected by clicking the Calendar  button.



Childhood Program Participation

Student Name: **Ramada, Keith** School: **Pinnacle Pre-School** Status: **Active** Room Name: VerboseAge: **3 yrs 8 mths**

**Programs** Programs Transactions

Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Birth Date
Ramada	Keith		997012	PS	Male	09/15/2005

**Add Program**

ChildHood Programs  Add New Program

**Services** Hide Detail

Line	Description	Detail
1	Early Childhood Block Grant	Program
2		

Line	Enter Date	Exit Date	CTDS	Family Income	Live In Household	Mother Emp Status	Father Emp Status	PPVT Exempt	Adult Education ID
1	09/05/2008		123456000	<input checked="" type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
2	5/31/2009			<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		

Figure 6.50 – Childhood Program Participation, Detailed Screen, Adding Enrollment

8. Enter the CTD code of the district that is paying for the program in the **CTDS** box.



**Reference:** The CTD code is assigned to the district by the state of Arizona. For instructions on how to look up the CTD code of a district, see the Before Starting section in Chapter 1 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

9. If the family's income is at or below federal poverty level standards, check the box labeled **Family Income**.
10. Indicate which family members live in the house with the child by selecting the appropriate value from the **Live in Household** drop-down box.
11. If the mother is employed, check the box labeled **MotherEmpStatus**. If the father is employed, check the box labeled **FatherEmpStatus**.
12. Select the student's grade level from the **Grade** drop-down.
13. If the child is participating in the Title I Even Start or State Family Literacy programs but is exempt from taking the PPVT III and PALS-PreK tests, select the exemption reason from the **PPVT Exempt** drop-down.
14. If the child is participating in the Title I Even Start or State Family Literacy programs which require other family members participate in an adult education program in conjunction with the child, enter the **Adult Education ID** of the program. This ID is assigned by the Arizona Dept. of Education.
15. Click the **Save** button at the top of the screen to save the new enrollment.
16. If the student receives multiple programs, they must be re-enrolled in each program by repeating the steps above.

## SCREENING PROGRAM TRANSACTIONS

Synergy SIS can automatically create the transaction records that need to be uploaded to the SAIS system at the State of Arizona. This is configured on the District Setup screen. For more information about setting this up, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*. To screen the transactions:

1. Find the student's records using either the **Scroll or Find** method.



Figure 6.51 – Childhood Program Participation Screen

2. Click the **Programs Transactions** tab of the Childhood Program Participation screen.

Line	Fiscal Year Start Date	Program	Entry Date	Exit Date	TDS	Family Income	LiveInHousehold	Mother Emp Status	Father Emp Status	Organization Name	Error
1	07/01/2008	Early Childhood Block Grant	09/05/2008	<b>05/29/2009</b>	23456000					Pinnacle Pre-School	

**LEGEND**  
 Bolded Text: Calculated Values  
 Highlighted Row: Indicates an Error condition

Figure 6.52 – Programs Transactions tab of the Childhood Program Participation Screen

3. Each transaction is listed on a separate line. Values that are shown in **Bold** are calculated by Synergy SIS.
4. If there is an error in the transaction that needs to be fixed, the line is highlighted and the error message is shown in the **Error** column. Errors are fixed by editing the data entered on the Needs tab according to the instructions in the Error message.

Transactions listed here may not have been uploaded to the state yet. This screen shows all transactions, not just those uploaded. Which records have been uploaded depends on a number of factors, including the error status of the transactions, the date of the last submission, and if Synergy SIS has been setup to automatically create the transactions.

# DELETING PROGRAM RECORDS

To completely remove a program record:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 6.53 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 6.54 – Childhood Program Participation Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 6.55 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 6.56 – Current Form Status

4. Click on the **Show Detail** button on the Programs tab of the Childhood Program Participation screen.

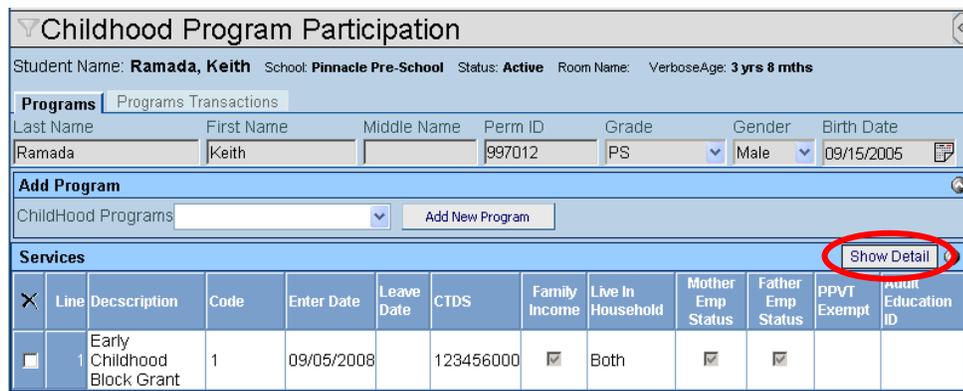


Figure 6.57 – Childhood Program Participation Screen, Show Detail Button

- Click on the **program line** on the left-hand side of the screen that needs to be deleted.

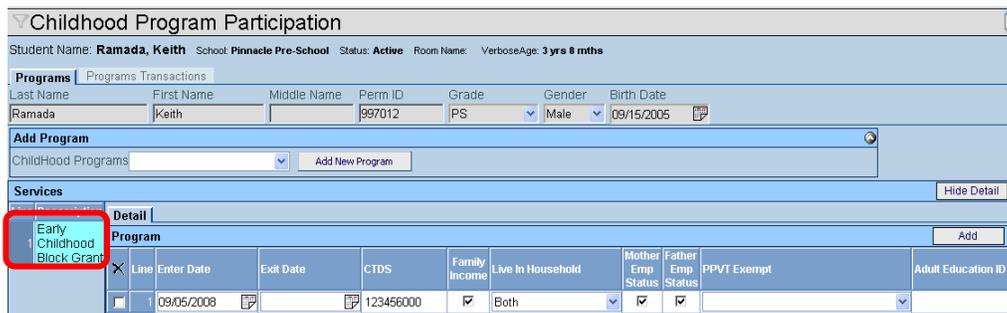


Figure 6.58 – Childhood Program Participation, Detailed Screen

- Click on the **X** column of all enrollment records in the detailed area on the right.

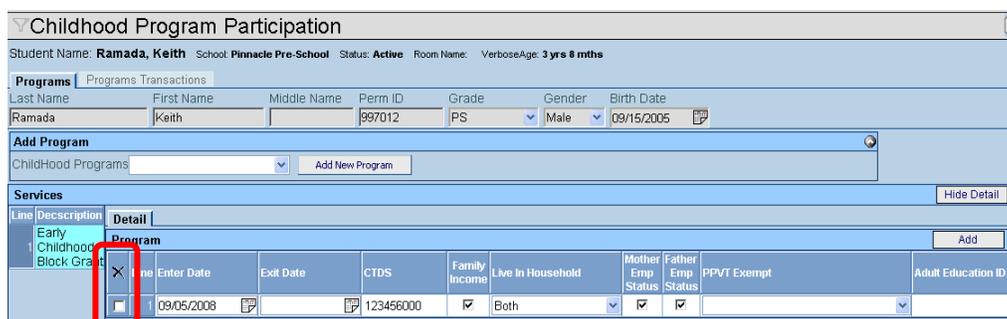


Figure 6.59 – Childhood Program Participation, Detailed Screen

- Click the **Save** button at the top of the screen to delete the record, or click the **Undo** button to cancel the operation without deleting the record.

## MENU OPTIONS

At the top of the Childhood Program Participation screen, a **Menu** button provides access to additional information regarding the student's records.



Figure 6.60 – Childhood Program Participation Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Childhood Program Participation** – the Audit Trail History screen lists all of the changes made to the student’s records, what was changed, who changed it, and the date and time the change was made.

Audit Trail History							
Properties							Show Detail
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name	Date Time Stamp
1	ChildProgParticipation	FatherEmpStatus	Delete		Y	User, Admin	05/31/2009 17:04:09
2		StudentGU	Delete		<Link>	User, Admin	05/31/2009 17:04:09
3		ChildPgmPartHisGU	Delete		<Link>	User, Admin	05/31/2009 17:04:09
4		ProgramCtds	Delete		123456000	User, Admin	05/31/2009 17:04:09
5		LiveInHouse	Delete		3	User, Admin	05/31/2009 17:04:09
6		MotherEmpStatus	Delete		Y	User, Admin	05/31/2009 17:04:09
7		FamilyIncome	Delete		N	User, Admin	05/31/2009 17:04:09
8		Grade	Delete		090	User, Admin	05/31/2009 17:04:09
9		AdultEducationID	Delete			User, Admin	05/31/2009 17:04:09
10		EnterDate	Delete		20090905	User, Admin	05/31/2009 17:04:09
11		ExitDate	Delete			User, Admin	05/31/2009 17:04:09
12		ProgramCode	Delete		1	User, Admin	05/31/2009 17:04:09
13		PpvtExempt	Delete			User, Admin	05/31/2009 17:04:09

Figure 6.61 – Audit Trail History for Childhood Program Participation

The **Print button** at the top of the screen may be used to print the information on the Childhood Program Participation screen.



Figure 6.62 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Line	Description	Code	Enter Date	Leave Date	CTDS	Family Income	Live In Household	Mother Emp Status	Father Emp Status	PPVT Exempt	Adult Educatio ID
1	Early Childhood Block Grant	1	09/05/2008		123456000	<input checked="" type="checkbox"/>	Both	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Figure 6.63 – Printed Childhood Program Participation Screen



# Chapter Seven: STUDENT GATE

In this chapter, the following topics are covered:

- ▶ Adding GATE program records
- ▶ Withdrawing & re-enrolling in the GATE program
- ▶ How to delete a GATE program record

## ADDING STUDENT GATE RECORDS

If the school offers a GATE program (Gifted and Talented Education), the student’s record of participation in this program can be entered into the Student GATE screen. GATE records are not used for state reporting at this time, and student participation in GATE-related programs for state reporting purposes is recorded in the Other Needs & Programs screen. The GATE screen can also store the results of the tests taken for entry into the program such as the Stanford-Binet or CogAT. To enter a student’s records:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

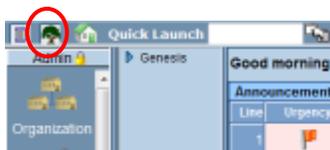


Figure 7.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 7.2 – Synergy SIS Folder

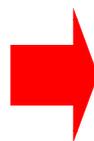


Figure 7.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.

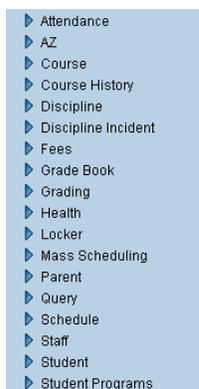


Figure 7.4 – Student Programs Folder



Figure 7.5 – Student Programs Folder Expanded

4. Click on the **Student GATE** screen, and the screen appears in the content pane on the right-side of the screen.

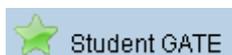


Figure 7.6 – Student GATE Screen Icon

5. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 7.7 – Checking Current Focus

6. Find the student for which to enter the record using either the **Scroll** or **Find** method.

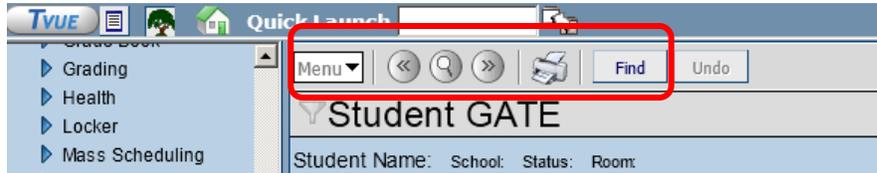


Figure 7.8 – Student GATE Screen

7. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 7.9 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 7.10 – Current Form Status

8. Click the **Add** button in the Student GATE section.

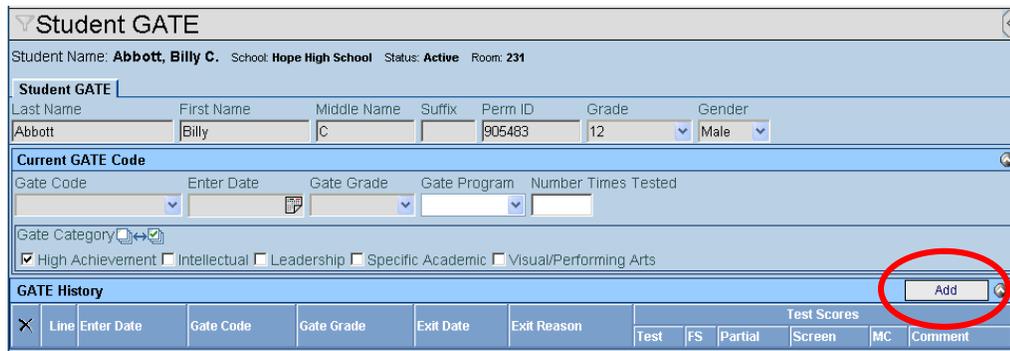
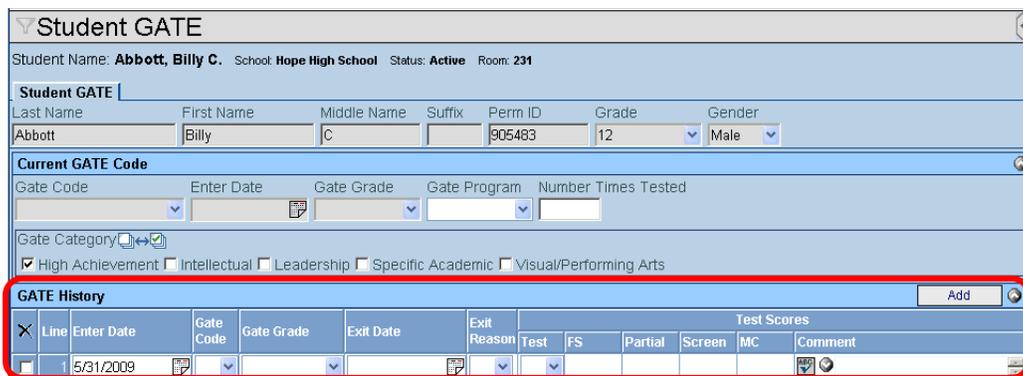


Figure 7.11 – Student GATE Screen, Adding

9. A blank line is added. Enter the date the student will begin participating the program in the **Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button. By default it enters today's date.

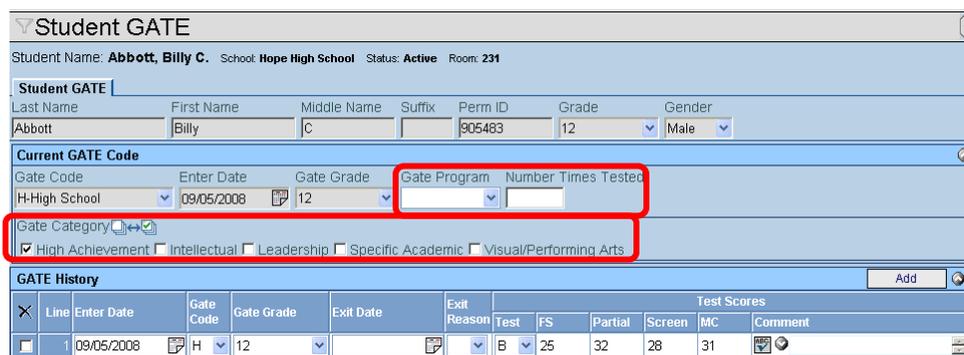


The screenshot shows the 'Student GATE' form for student Abbott, Billy C. The 'Current GATE Code' section has 'Enter Date' set to 5/31/2009. The 'GATE History' table below has one row:

Line	Enter Date	Gate Code	Gate Grade	Exit Date	Exit Reason	Test	FS	Partial	Screen	MC	Comment
1	5/31/2009										

Figure 7.12 – Student GATE Screen, Adding

10. Select the **GATE Code** from the drop-down. These values are set by the district, and may be used as a status code such as applied, disqualified, etc.
11. Select the student's grade from the **Gate Grade** drop-down menu.
12. Enter the student's test scores in the Test Scores section. Select which test was used from the **Test** drop-down menu. These values are set by the district, but are commonly set to tests such as the Stanford-Binet or WISC.
13. Enter the scores themselves in the **FS**, **Partial**, **Screen**, and **MC** fields.
14. Enter any notes about the test in the **Comment** field. The comments may be checked for spelling by clicking the SpellCheck  button.
15. Click the **Save** button at the top of the screen to save the record.
16. Three fields can also store overall information about the student's participation in the GATE program. The **GATE Category** lists the category of the student's participation. The categories are selected by the district. Check the boxes of all that apply to the student.



The screenshot shows the 'Student GATE' form for student Abbott, Billy C. The 'Current GATE Code' section has 'Enter Date' set to 09/05/2008, 'Gate Code' set to H-High School, 'Gate Grade' set to 12, and 'Gate Program' set to B. The 'GATE History' table below has one row:

Line	Enter Date	Gate Code	Gate Grade	Exit Date	Exit Reason	Test	FS	Partial	Screen	MC	Comment
1	09/05/2008	H	12			B	25	32	28	31	

Figure 7.13 – Student Gate Screen

17. Select the **GATE Program** from the drop-down list, and enter the number of times a student took the entrance test in the **Number Times Tested** field. The GATE program is also selected by the district.
18. Click the **Save** button at the top of the screen to save the changes.



**Reference:** Additional details about the district-created fields such as the GATE Program and GATE Category, and how to setup these values, can be found in the Student GATE section in Chapter Three of the *State of Arizona Data Reporting Administrator Guide*.

## WITHDRAWING FROM THE STUDENT GATE PROGRAM

When a student is no longer participating in the Student GATE program, the date of withdrawal and the reason for the withdrawal must be recorded in the Student GATE screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the program at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*.

To record the student's withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 7.14 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 7.15 – Student GATE Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



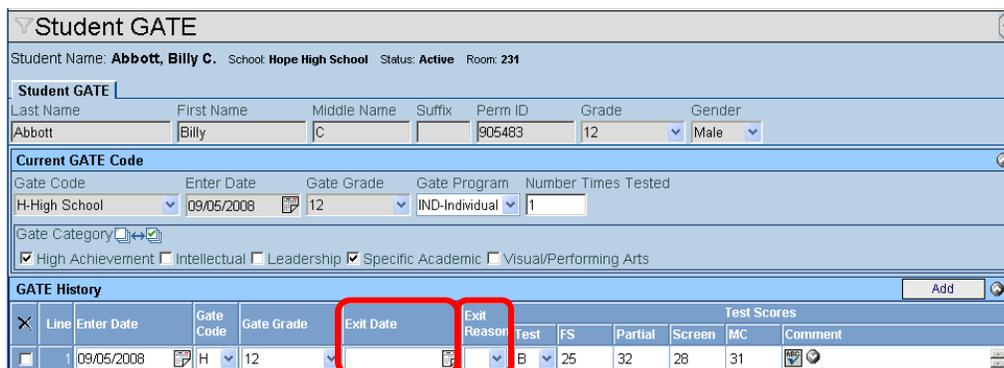
Figure 7.16 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 7.17 – Current Form Status

- Enter the date of withdrawal in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.



The screenshot shows the 'Student GATE' form for a student named Abbott, Billy C. The 'Current GATE Code' section includes fields for Gate Code (H-High School), Enter Date (09/05/2008), Gate Grade (12), Gate Program (IND-Individual), and Number Times Tested (1). The 'GATE History' table below has two columns highlighted with red boxes: 'Exit Date' and 'Exit Reason'. The table contains one record with the following data:

X	Line	Enter Date	Gate Code	Gate Grade	Exit Date	Exit Reason	Test	FS	Partial	Screen	MC	Comment
	1	09/05/2008	H	12			B	25	32	26	31	

Figure 7.18 – Student GATE Screen, Exit Date & Reason

- Select the reason the student withdrew from the **Exit Reason** drop-down. These values are selected by the district.
- Click the **Save** button at the top of the screen.



**Tip:** All students should be marked as withdrawn from programs at the end of the year using the End of School Year code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

## RE-ENROLLING IN THE STUDENT GATE PROGRAMS

If the student re-enrolls in the school or in the Student GATE program after the program has been marked as withdrawn, a new record needs to be entered into the Student GATE screen. Since the student's Student GATE program has to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new record for the program as well.

To re-enroll the student in the program, just add a new record with the new date following the instructions in the Adding Student GATE Records section in this chapter.

# DELETING STUDENT GATE RECORDS

To complete remove a record of participation in the Student GATE program:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 7.19 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 7.20 – Student GATE Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 7.21 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 7.22 – Current Form Status

4. Click the checkbox in the **X** column for the record to be deleted.

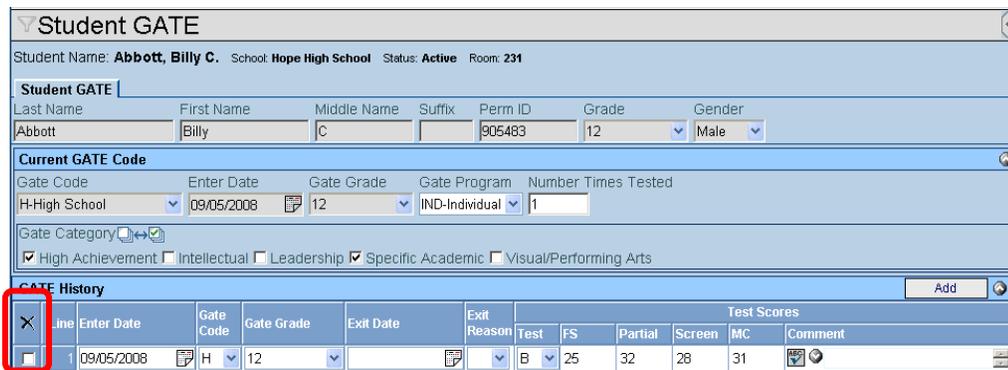


Figure 7.23 – Student GATE Screen, Deleting

5. Click the **Save** button at the top of the screen to delete the record, or click Undo to cancel the deletion.

# MENU OPTIONS

At the top of the Student GATE screen, a **Menu** button provides access to additional information regarding the student's records.



Figure 7.24 – Student GATE Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Student GATE** – the Audit Trail History screen lists all of the changes made to the student's records, what was changed, who changed it, and the date and time the change was made.

Audit Trail History						
Properties						
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name Date Time Stamp
1	StudentGATECategoryLst	StuPgmGatCatLstGU	Insert	<Link>		User, Admin 05/31/2009 13:34:58
2		GateCategory	Insert	S		User, Admin 05/31/2009 13:34:58
3		StudentGU	Insert	<Link>		User, Admin 05/31/2009 13:34:58
4	StudentGATE	GateProgram	Update	IND		User, Admin 05/31/2009 13:34:52
5		NumberTimesTested	Update	1		User, Admin 05/31/2009 13:34:52
6	StudentGATEHistory	StudentGU	Insert	<Link>		User, Admin 05/31/2009 13:28:57
7		GateTest	Insert	B		User, Admin 05/31/2009 13:28:57
8		TestScreenScore	Insert	28		User, Admin 05/31/2009 13:28:57
9		EnterDate	Insert	20080905		User, Admin 05/31/2009 13:28:57
10		TestPartialScore	Insert	32		User, Admin 05/31/2009 13:28:57
11		GateGrade	Insert	220		User, Admin 05/31/2009 13:28:57
12		StuPgmGatHisGU	Insert	<Link>		User, Admin 05/31/2009 13:28:57
13		GateCode	Insert	H		User, Admin 05/31/2009 13:28:57
14		TestMcScore	Insert	31		User, Admin 05/31/2009 13:28:57
15		TestFScore	Insert	25		User, Admin 05/31/2009 13:28:57
16	StudentGATE	GateCode	Insert	H		User, Admin 05/31/2009 13:28:57
17		GateGrade	Insert	220		User, Admin 05/31/2009 13:28:57
18		GateProgram	Insert	<Link>		User, Admin 05/31/2009 13:28:57
19		StudentGU	Insert	<Link>		User, Admin 05/31/2009 13:28:57
20		NumberTimesTested	Insert			User, Admin 05/31/2009 13:28:57
21		EnterDate	Insert	20080905		User, Admin 05/31/2009 13:28:57

Figure 7.25 – Audit Trail History for Student GATE

The **Print** button at the top of the screen may be used to print the information on the Student Needs screen.



Figure 7.26 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Menu	Navigation	Save	Undo	Form Status: Ready (Update Mode)		
<b>Student GATE</b>						
Student Name: <b>Abbott, Billy C.</b> School: Hope High School Status: Active Room: 231						
<b>Student GATE</b>						
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Ge
Abbott	Billy	C		905483	12	Ma
<b>Current GATE Code</b>						
Gate Code	Enter Date	Gate Grade	Gate Program	Number Times Tested		
H-High School	09/05/2008	12	IND-Individual	1		
Gate Category: <input checked="" type="checkbox"/> High Achievement <input type="checkbox"/> Intellectual <input type="checkbox"/> Leadership <input checked="" type="checkbox"/> Specific Academic <input type="checkbox"/> Visual/Performing Arts						
<b>GATE History</b>						
X Line	Enter Date	Gate Code	Gate Grade	Exit Date	Exit Reason	Test FS Partial Screen
1	09/05/2008	H	12			B 25 32 28

Figure 7.27 – Printed Student GATE Screen



## Chapter Eight: FREE & REDUCED MEALS

In this chapter, the following topics are covered:

- ▶ Adding free & reduced meals program records
- ▶ Withdrawing & re-enrolling in the free & reduce meals program
- ▶ Screening the free & reduced meals transaction records
- ▶ How to delete a free & reduced meals record

## ADDING FREE & REDUCED MEAL RECORDS

If a student is eligible for free & reduced meals, this information needs to be recorded in Synergy SIS so that they can be reported to the state in conjunction with the normal upload procedure. If all the students at a school are eligible for free or reduced meals, the entire school can be marked for free & reduced meals as outlined in the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*. If the school has been set to report all students with NCLB Indicator 1 or 2, individual student records do not need to be entered.

Otherwise, to record an individual student's free & reduced meal eligibility:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.



Figure 8.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 8.2 – Synergy SIS Folder



Figure 8.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 8.4 – Student Programs Folder



Figure 8.5 – Student Programs Folder Expanded

4. Click on the **Free and Reduced Meals** screen, and the screen appears in the content pane on the right-side of the screen.



Figure 8.6 – Free and Reduced Meals Screen Icon

5. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 8.7 – Checking Current Focus

6. Find the student using either the **Scroll or Find** method.



Figure 8.8 – Free and Reduced Meals Screen

7. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 8.9 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 8.10 – Current Form Status

8. Click the **Add** button in the Free and Reduced Meals section.

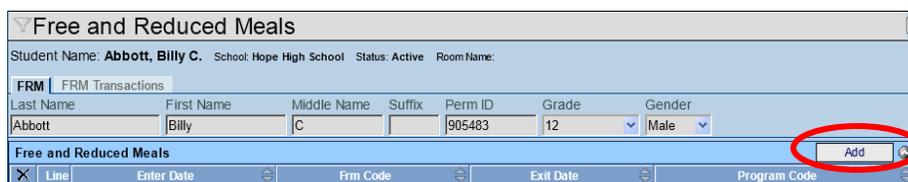


Figure 8.11 – Free and Reduced Meals Screen, Adding

9. A blank line is added. Enter the date the student will begin participating the program in the **Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button. By default it enters today's date.

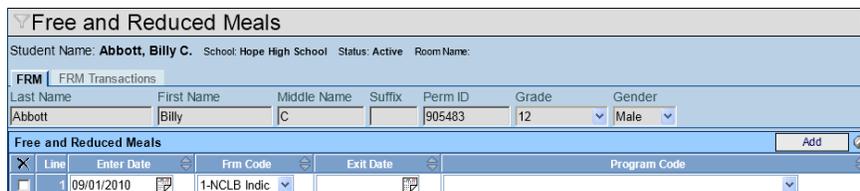


Figure 8.12 – Free and Reduced Meals Screen, Adding

10. Select either **NCLB Indicator 1** or **NCLB Indicator 2** from the **FRM Code** drop-down. NCLB Indicator 1 is free, and NCLB Indicator 2 is reduced.
11. If the school is in federal improvement status, the student's participation in the School Improvement Supplemental Education Services program can be selected from the **Program Code** drop-down.
12. Click the **Save** button at the top of the screen to save the record.

## WITHDRAWING FROM THE FREE & REDUCED MEALS PROGRAM

When a student is no longer participating in the Free & Reduced Meals program, the date of withdrawal must be recorded in the Free & Reduced Meals screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the programs at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

To record the student's withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 8.13 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 8.14 – Free and Reduced Meals Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



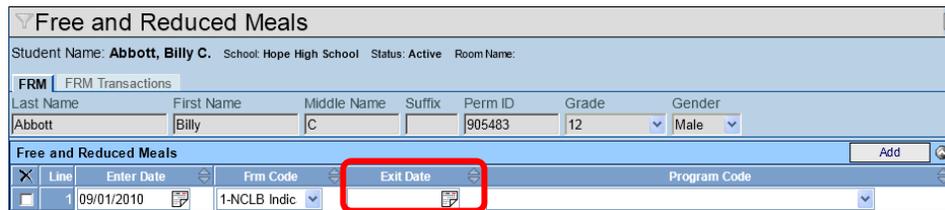
Figure 8.15 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 8.16 – Current Form Status

4. Enter the date of withdrawal in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.



The screenshot shows the 'Free and Reduced Meals' screen for student Abbott, Billy C. The student's information is displayed at the top, including school (Hope High School) and status (Active). Below this, there are fields for Last Name (Abbott), First Name (Billy), Middle Name (C), Suffix, Perm ID (905483), Grade (12), and Gender (Male). The main section is a table for 'Free and Reduced Meals' with columns: Line, Enter Date, Frm Code, Exit Date, and Program Code. The first row has Line 1, Enter Date 09/01/2010, Frm Code 1-NCLB Indic, and Exit Date is highlighted with a red box. There is an 'Add' button at the top right of the table.

Figure 8.17 – Free and Reduced Meals Screen, Exit Date

5. Click the **Save** button at the top of the screen.



**Tip:** All students must be marked as withdrawn from programs at the end of the year using the End of School Year code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

## RE-ENROLLING IN THE FREE & REDUCED MEALS PROGRAMS

If the student re-enrolls in the school or in the Free & Reduced Meals program after the program has been marked as withdrawn, a new record needs to be entered into the Free & Reduced Meals screen. Since the student's Free & Reduced Meals program has to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new record for the program as well.

To re-enroll the student in the program, just add a new record with the new date following the instructions in the Adding Free & Reduced Meal Records section in this chapter.

# SCREENING FREE & REDUCED MEALS TRANSACTIONS

Synergy SIS can automatically create the transaction records that need to be uploaded to the SAIS system at the State of Arizona. This is configured on the District Setup screen. For more information about setting this up, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*. To screen the transactions:

1. Find the student using either the **Scroll or Find** method.

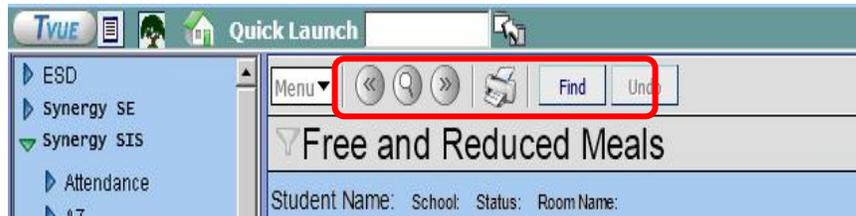


Figure 8.18 – Free and Reduced Meals Screen

2. Click the **FRM Transactions** tab of the Free and Reduced Meals screen.

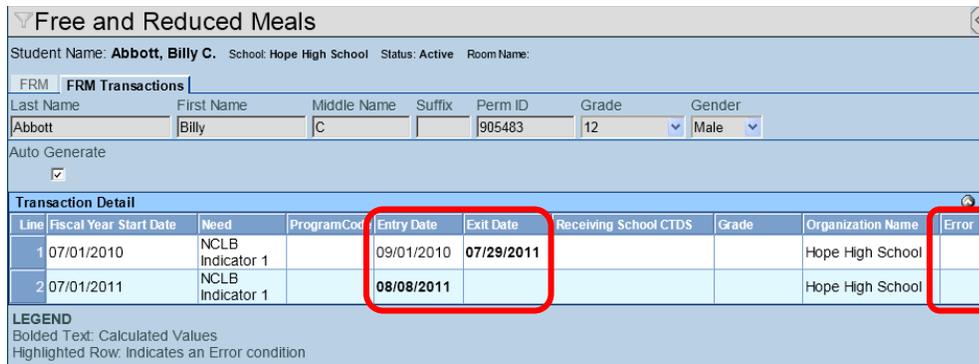


Figure 8.19 – FRM Transactions tab of the Free and Reduced Meals Screen

3. Each transaction is listed on a separate line. Values that are shown in **Bold** are calculated by Synergy SIS.
4. If there is an error in the transaction that needs to be fixed, the line is highlighted and the error message is shown in the **Error** column. Errors are fixed by editing the data entered on the FRM tab according to the instructions in the Error message.

Transactions listed here may not have been uploaded to the state yet. This screen shows all transactions, not just those uploaded. Which records have been uploaded depends on a number of factors, including the error status of the transactions, the date of the last submission, and if Synergy SIS has been setup to automatically create the transactions.

# DELETING FREE & REDUCED MEAL RECORDS

To completely remove a record of participation in the Free & Reduced Meals program:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 8.20 – Checking Current Focus

2. Find the student's records using either the **Scroll or Find** method.



Figure 8.21 – Free and Reduced Meals Screen

3. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 8.22 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 8.23 – Current Form Status

4. Click the checkbox in the **X** column for the record to be deleted.

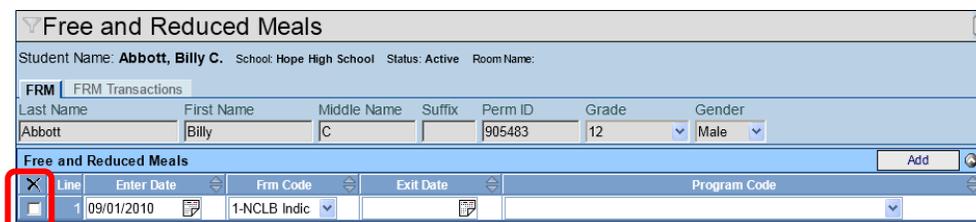


Figure 8.24 – Free and Reduced Meals Screen, Deleting

5. Click the **Save** button at the top of the screen to delete the record, or click Undo to cancel the deletion.

# MENU OPTIONS

At the top of the Free and Reduced Meals screen, a **Menu** button provides access to additional information regarding the student's records.



Figure 8.25 – Free and Reduced Meals Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Free and Reduced Meals** – the Audit Trail History screen lists all of the changes made to the student's records, what was changed, who changed it, and the date and time the change was made.

Audit Trail History						
Properties						
Line	Business Object	Property Name	Crud Action	New Value	Old Value	Date Time Stamp
1	StudentFRMHistory	EnterDate	Update	20080905	20090530	User, Admin 05/31/2009 07:50:06
2	StudentFRMHistory	StudentGU	Insert	<Link>		User, Admin 05/31/2009 07:49:49
3		EnterDate	Insert	20090530		User, Admin 05/31/2009 07:49:49
4		StuPgmFRmHisGU	Insert	<Link>		User, Admin 05/31/2009 07:49:49
5		FrmCode	Insert	2		User, Admin 05/31/2009 07:49:49
6	StudentFRMHistory	FrmCode	Delete		2	User, Admin 05/30/2009 19:43:09
7		EnterDate	Delete		20080909	User, Admin 05/30/2009 19:43:09
8		StuPgmFRmHisGU	Delete		<Link>	User, Admin 05/30/2009 19:43:09
9		StudentGU	Delete		<Link>	User, Admin 05/30/2009 19:43:09
10		ExitDate	Delete			User, Admin 05/30/2009 19:43:09
11	StudentFRMHistory	EnterDate	Insert	20080909		Wilson, Rob 12/08/2008 16:43:33
12		StudentGU	Insert	<Link>		Wilson, Rob 12/08/2008 16:43:33
13		StuPgmFRmHisGU	Insert	<Link>		Wilson, Rob 12/08/2008 16:43:33
14		FrmCode	Insert	2		Wilson, Rob 12/08/2008 16:43:33
15	Student	HomeLanguage	Update	01	00	Wilson, Rob 12/08/2008 08:20:02
16	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob 11/24/2008 15:45:41
17	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob 11/12/2008 23:24:31
18		GridCode	Update	741B	741B	Wilson, Rob 11/12/2008 23:24:31
19	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob 11/12/2008 23:24:22
20		GridCode	Update	741B	741B	Wilson, Rob 11/12/2008 23:24:22
21	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob 10/22/2008 08:17:43
22		GridCode	Update	741B	741B	Wilson, Rob 10/22/2008 08:17:43
23	Student	GridCode	Update	741B	741B	Wilson, Rob 10/22/2008 08:17:36
24		HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob 10/22/2008 08:17:36
25	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob 10/15/2008 16:49:31

Figure 8.26 – Audit Trail History for Free and Reduced Meals

The **Print** button at the top of the screen may be used to print the information on the Student Needs screen.



Figure 8.27 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Line	Enter Date	Frm Code	Exit Date
1	09/05/2008	2-NCLB Indicator 2	

Figure 8.28 – Printed Free and Reduced Meals Screen

## Chapter Nine: OTHER NEEDS & PROGRAMS

In this chapter, the following topics are covered:

- ▶ Adding other needs & programs records
- ▶ Screening & deleting other needs & programs records
- ▶ Recording a student's withdrawal from other needs & programs
- ▶ How to re-enroll a student in a program

## ADDING OTHER NEEDS & PROGRAMS

If a student is eligible for other needs & program, this information needs to be recorded in Synergy SIS so that they can be reported to the state in conjunction with the normal upload procedure. If only a need is recorded, only a Student Need transaction will be submitted to the state. If the student's participation in a program is also recorded, then a Support Program transaction will also be sent to the state.

If all the students at a school are eligible for a need/program such as Title I, the entire school can be marked for the program as outlined in the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*. If the school has been set to report all students with the program, individual student records do not need to be entered.

To record an individual student's needs & programs:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

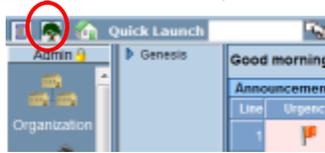


Figure 9.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

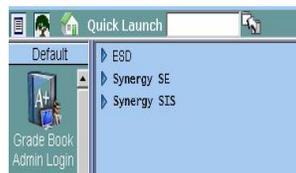


Figure 9.2 – Synergy SIS Folder

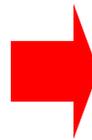


Figure 9.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.



Figure 9.4 – Student Programs Folder



Figure 9.5 – Student Programs Folder Expanded

4. Click on the **Student Needs** screen, and the screen appears in the content pane on the right-side of the screen.

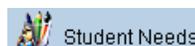


Figure 9.6 – Student Needs Screen Icon

5. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 9.7 – Checking Current Focus

6. Find the student for which to enter the needs & programs using either the **Scroll or Find** method.



Figure 9.8 – Student Needs Screen

7. Once the student has been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 9.9 – Edit Button

The current mode is listed in the top right-hand corner under Form Status.



Figure 9.10 – Current Form Status

8. Select the student's need from the **Needs** drop-down box, and click the **Add New Need/Service** button.

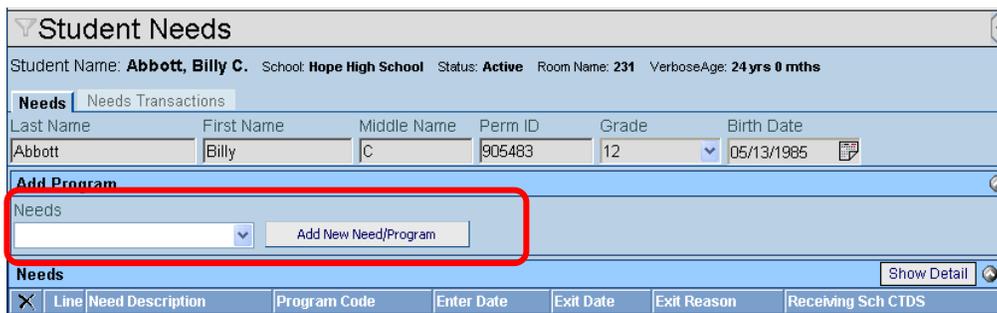


Figure 9.11 – Student Needs Screen, Adding

- The Student Program Add screen pops-up. Select the program in which the student will be participating from the **Program Code** drop-down box.

Figure 9.12 – Student Program Add Screen

- Enter the date the student will begin participating the program in the **Enter Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button. By default it enters today’s date.
- By default the CTD code of the current district in focus in Synergy SIS is entered in the **Receiving Sch CTDS** box. If this student’s programs are funded by another district enter the CTD code for that district in the Receiving Sch CTDS box.



**Reference:** The CTD code is assigned to the district by the state of Arizona. For instructions on how to look up the CTD code of a district, see the Before Starting section in Chapter 1 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

- Click the **Save Program** button at the top of the screen to save the record, or click Close to close the screen without saving.

## HOMELESS NEED

If the student’s need is **Homeless**, it is also required to select the student’s primary nighttime residence. To add this to the student’s record:

- Once the Homeless need has been entered, click on the **Show Detail** button.

Line	Need Description	Program Code	Enter Date	Exit Date	Exit Reason	Receiving Sch CTDs
1	Homeless	21st Century program	09/05/2008			123456000

Figure 9.13 – Student Needs Screen

2. Select the student's residence from the **Nighttime Residence** drop-down list. This field only appears on the detailed screen if Homeless is selected as the need.

The screenshot displays the 'Student Needs' interface for a student named Billy C. Abbott. The student's information includes: School: Hope High School, Status: Active, Room Name: , VerboseAge: 17 yrs 3 mths. The 'Needs' section is expanded, showing a table with one entry: Line 1, Need Description: Homeless, Program Code: 21. Below this, the 'History' table shows a record for 'Homeless' starting on 09/05/2008. A red box highlights the 'Nighttime Residence' drop-down menu, which is currently set to 'Sheltered'.

Figure 9.14 – Student Needs Screen, Detailed Screen

3. Click the **Save** button at the top of the screen to save the changes.

## HOMEBOUND

A homebound or hospitalized student is one who is capable of profiting from academic instruction but is unable to attend school due to illness, disease, accident, or other health conditions, who has been examined by a competent medical doctor and is certified by that doctor as being unable to attend regular classes for a period of not less than three school months or a pupil who is capable of profiting from academic instruction but is unable to attend school regularly due to chronic or acute health problems, who has been examined by a competent medical doctor and who is certified by that doctor as being unable to attend regular classes for intermittent periods of time totaling three school months during a school year. The medical certification shall state the general medical condition, such as illness, disease or chronic health condition that is the reason that the pupil is unable to attend school.

Homebound or hospitalized categories can include students who are unable to attend school for a period of less than three months due to a pregnancy if a competent medical doctor, after an examination, certifies that the student is unable to attend regular classes due to risk to the pregnancy or to the student's health. (A.R.S. § 15-901(B)(13))

To maintain homebound status the following requirements must be met:

- The student must be enrolled in the school the student would otherwise attend
- The student must be receiving at least 240 minutes of instruction per week (A.R.S. § 15-901(A)(2)(b)(iii) and (A)(6)(f))
- A certified teacher must be providing the instruction

Homebound and hospitalized students must report attendance by minutes attended. For homebound and hospitalized students, a full week of attendance may be counted for each week in which the student receives at least four hours of instruction.

To report a student as homebound in Synergy SIS, do not enter a need in the Student Needs screen. Instead, the student is flagged as homebound on the Enrollment tab of the Student screen, and the needs transaction is automatically generated and sent to the state. To mark a student as homebound:

1. Go to the **Student** screen, found under Synergy SIS > Student, and click on the **Enrollment** tab.

The screenshot shows the 'Student' screen for 'Abbott, Billy C.' at 'Hope High School'. The 'Enrollment' tab is active. In the 'Enrollment Activity' section, the 'Effective Date' is set to 09/15/2011. The 'Homebound' checkbox is checked, and the 'Access 504' dropdown is set to 'Homebound'. Other fields include SAIS ID 0001341311, Enter Date 08/08/2011, Enter Code E1, Grade 12, and District Of Residence 123456000.

Figure 9.15 – Student Screen, Enrollment Tab, Homebound Student

2. Check the box labeled **Homebound**, and enter the date the student first became homebound in the **Effective Date** box. Dates must be entered in MM/DD/YY format or they can be selected by clicking on the Calendar button.
3. Click the **Save** button at the top of the screen.

When the student returns to the classroom, the homebound designation must be removed. To mark a student as returned from homebound status:

1. Go to the **Student** screen, found under Synergy SIS > Student, and click on the **Enrollment** tab.

The screenshot shows the 'Student' screen for 'Abbott, Billy C.' at 'Hope High School'. The 'Enrollment' tab is active. In the 'Enrollment Activity' section, the 'Effective Date' is set to 09/15/2011. The 'Homebound' checkbox is unchecked. Other fields include SAIS ID 0001341311, Enter Date 08/08/2011, Enter Code E1, Grade 12, and District Of Residence 123456000.

Figure 9.16 – Student Screen, Enrollment Tab, Returning Student

- Uncheck the box labeled **Homebound**, and enter the date the student returned to school in the **Effective Date** box. Dates must be entered in MM/DD/YY format or they can be selected by clicking on the Calendar button.
- Click the **Save** button at the top of the screen.

In addition to flagging the student as homebound, the minutes of instruction the student receives must be documented and sent to the state. To record the minutes of instruction received:

- Go to the **Daily Attendance** screen, found under Synergy SIS > Attendance, and find the student using the Scroll buttons or Find mode.
- Click on the **Daily Entry** tab.

The screenshot displays the 'Daily Attendance' interface for a student named Billy C. Abbott. The 'Daily Entry' tab is active, showing a form with the following sections:

- Student Information:** Last Name (Abbott), First Name (Billy), Middle Name (C), Suffix, Perm ID (905483), Grade (12), Gender (Male).
- Date:** 09/08/2011, with 'Go To Date' and 'Go To Current Date' buttons.
- Attendance Reasons:** A dropdown menu for 'Reason 1'.
- Attendance Minutes:** Fields for 'Arrive Time', 'Depart Time', and 'Total Minutes Attended'.
- Attendance Note:** A text area for entering notes.

Figure 9.17 – Daily Attendance Screen, Daily Entry Tab

- Enter the total minutes of instruction received in the **Total Minutes Attended** box.
- Click the **Save** button at the top of the screen.

Even if the school takes period attendance, the minutes of instruction for the day should be recorded in the Daily Attendance screen.

## WITHDRAWING FROM A PROGRAM

When a student is no longer participating in a program, the exit date and reason must be recorded in the Student Needs screen.



**Reference:** If the student is withdrawing from the school, Synergy SIS can be setup to automatically withdraw the student from the programs at the same time the withdrawal is entered into the Student screen. To configure this, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *State of Arizona Data Reporting Administrator Guide*.

To record the student’s withdrawal:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 9.18 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.

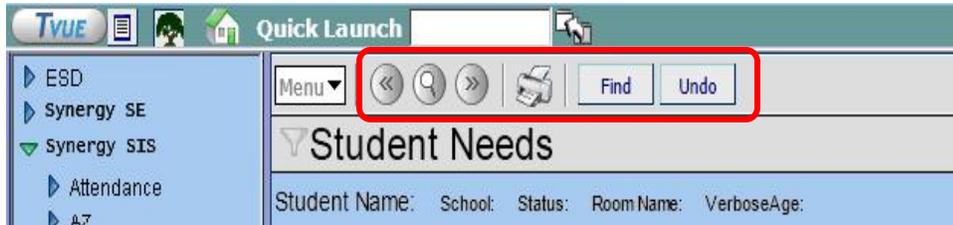


Figure 9.19 – Student Needs Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 9.20 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 9.21 – Current Form Status

4. Click on the **Show Detail** button in the Student Needs screen.

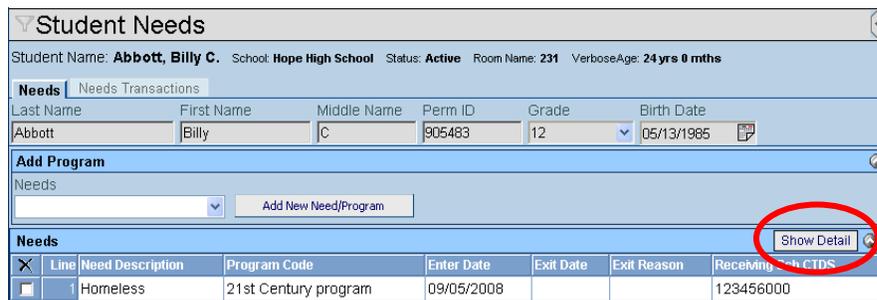


Figure 9.22 – Student Needs Screen, Show Detail button

5. Select the **need/program line** to withdraw by clicking on it on the left-hand side of the screen.

**Student Needs**

Student Name: **Abbott, Billy C.** School: Hope High School Status: Active Room Name: VerboseAge: 17 yrs 3 mths

**Needs** Needs Transactions

Last Name	First Name	Middle Name	Perm ID	Grade	Birth Date
Abbott	Billy	C	905483	12	05/13/1992

**Add Program**

Needs

Program Code: 21

**Homeless** Detail

**History**

Line	Enter Date	Exit Date	Exit Reason	Receiving Sch CTDS	Nighttime Residence
1	09/05/2008			123456000	Sheltered

Figure 9.23 – Student Needs, Detailed Screen

6. Enter the date the student withdrew in the **Exit Date** box. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar button.
7. Select the reason the student withdrew from the **Exit Reason** drop-down box.
8. Click the **Save** button at the top of the screen.



**Tip:** All students must be marked as withdrawn from programs at the end of the year using the End of School Year code. A quick way to do this is using the Mass Update Student Programs screen. For more information about this screen, see Chapter 10 in this guide.

## RE-ENROLLING IN A PROGRAM

If the student re-enrolls in the school or in a program after the program has been marked as withdrawn, the enrollment record needs to be entered into the Student Needs screen. Since all of the student needs & program records have to be marked as withdrawn at the end of the year, any student who returns to the school the following year must have a new enrollment record for the program as well.



**Note:** Only one record with the same need and program may be entered into the student's record. The same need may be entered only if the student is receiving a different program. To enter a different need, or the same need with a different program, follow the instructions for Adding Other Needs & Programs in this chapter. Otherwise, if the student is re-enrolling with the same need and program, follow the instructions in this section.

To re-enroll a student in the same need and program:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 9.24 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 9.25 – Student Needs Screen

3. Once the student’s records are located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 9.26 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 9.27 – Current Form Status

4. Click on the **Show Detail** button in the Student Needs screen.

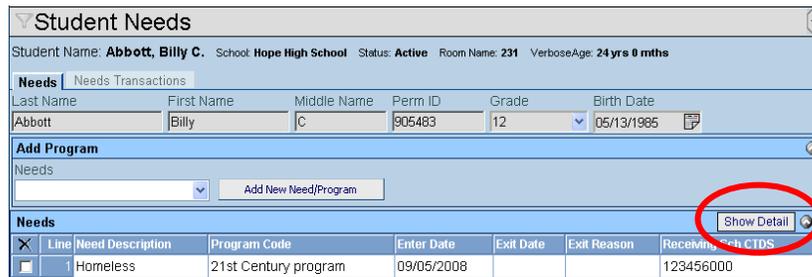


Figure 9.28 – Student Needs Screen, Show Detail button

- Click on the **need/program line** on the left-hand side of the screen in which to re-enroll the student.

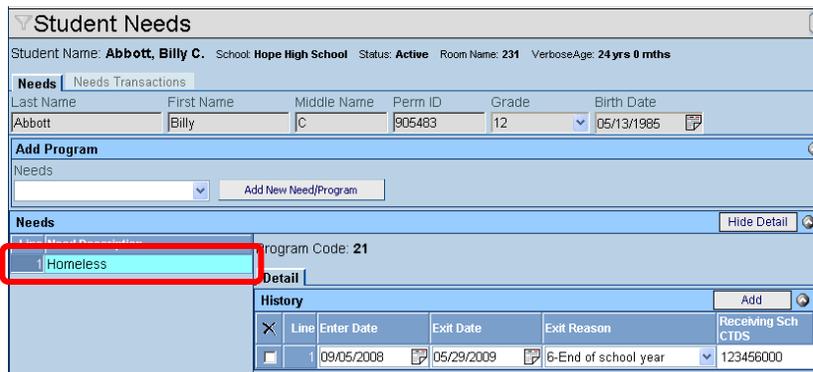


Figure 9.29 – Student Needs, Detailed Screen

- Click the **Add** button in the Detail section.

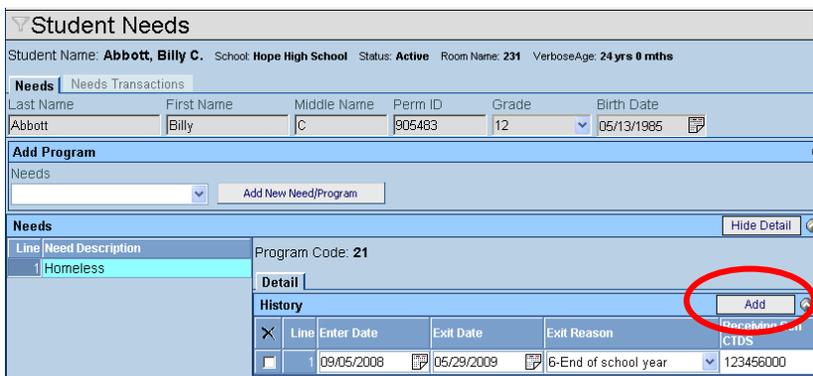


Figure 9.30 – Student Needs, Detailed Screen, Add button

- In the blank line that appears, edit the **Enter Date** so that it reflects the student's enrollment date. By default it enters today's date. The date should be entered in the format M/D/YY or it may be selected by clicking the Calendar button.

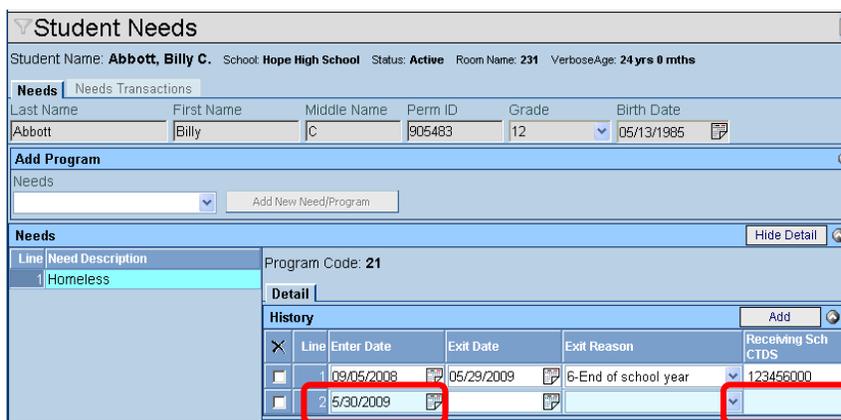


Figure 9.31 – Student Needs, Detailed Screen, Adding Enrollment

- Enter the CTD code of the district in the **Receiving Sch CTDS** box.
- Click the **Save** button at the top of the screen to save the new enrollment.

10. If the student receives multiple programs, they must be re-enrolled in each program by repeating the steps above.

## SCREENING NEEDS TRANSACTIONS

Synergy SIS can automatically create the transaction records that need to be uploaded to the SAIS system at the State of Arizona. This is configured on the District Setup screen. For more information about setting this up, see the section on Overall Student Programs Transactions Setup in Chapter 3 of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*. To screen the transactions:

1. Find the student's records using either the **Scroll or Find** method.

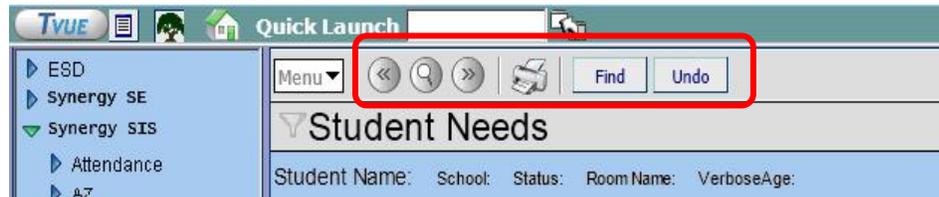


Figure 9.32 – Student Needs Screen

2. Click the **Needs Transactions** tab of the Student Needs screen.

 A screenshot of the 'Student Needs' screen with the 'Needs Transactions' tab selected. The student information is: Student Name: Abbott, Billy C., School: Hope High School, Status: Active, Room Name: 231, VerboseAge: 24 yrs 0 mths. Below this is a table with columns: Line, Fiscal Year Start Date, Need, Program Code, Enter Date, Exit Date, Exit Reason, Receiving School CTDS, School, and Error. The 'Exit Date' column for line 1 is bolded as '06/05/2009'. The 'Error' column for line 1 is highlighted in red. A legend at the bottom states: 'Bolded Text: Calculated Values' and 'Highlighted Row: Indicates an Error condition'.
 

Line	Fiscal Year Start Date	Need	Program Code	Enter Date	Exit Date	Exit Reason	Receiving School CTDS	School	Error
1	07/01/2008	Homeless	21st Century program	09/05/2008	<b>06/05/2009</b>		123456000	Hope High School	

Figure 9.33 – Needs Transactions tab of the Student Needs Screen

3. Each transaction is listed on a separate line. Values that are shown in **Bold** are calculated by Synergy SIS.
4. If there is an error in the transaction that needs to be fixed, the line is highlighted and the error message is shown in the **Error** column. Errors are fixed by editing the data entered on the Needs tab according to the instructions in the Error message.

Transactions listed here may not have been uploaded to the state yet. This screen shows all transactions, not just those uploaded. Which records have been uploaded depends on a number of factors, including the error status of the transactions, the date of the last submission, and if Synergy SIS has been setup to automatically create the transactions.

# DELETING NEEDS & PROGRAMS RECORDS

To completely remove a need/program record:

1. Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 9.34 – Checking Current Focus

2. Find the student’s records using either the **Scroll or Find** method.



Figure 9.35 – Student Needs Screen

3. Once the student’s records have been located, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.



Figure 9.36 – Edit Button

The current mode is indicated in the top right-hand corner of the screen where it says Form Status.



Figure 9.37 – Current Form Status

4. Click on the **Show Detail** button on the Needs tab of the Student Needs screen.

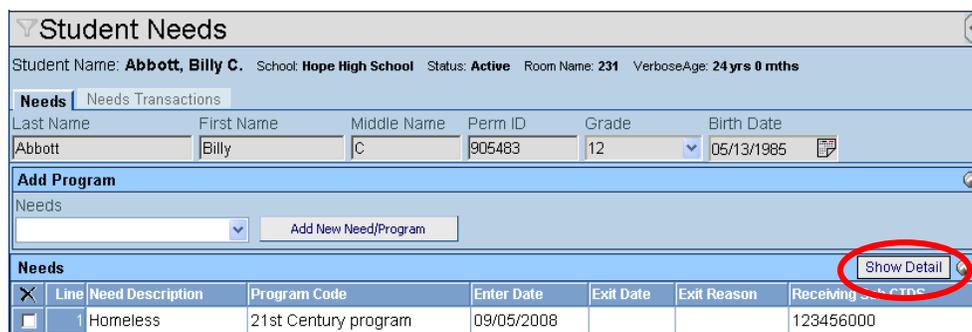


Figure 9.38 – Student Needs Screen, Show Detail Button

- Click on the **need/program line** on the left-hand side of the screen that needs to be deleted.

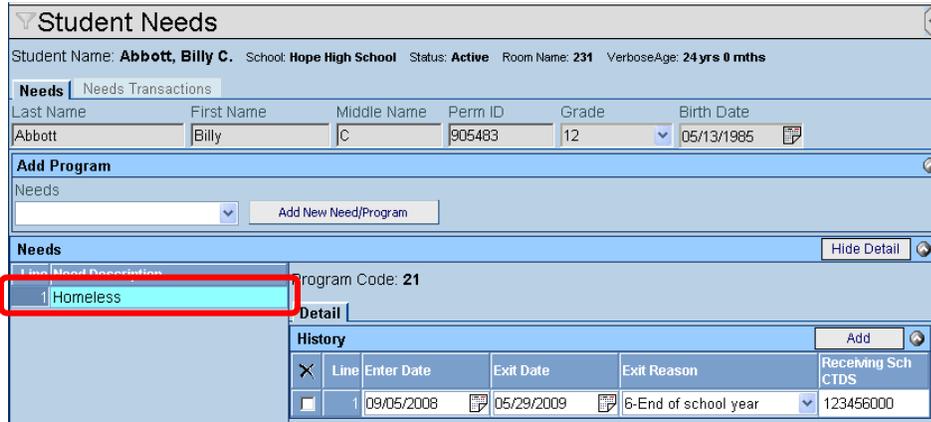


Figure 9.39 – Student Needs, Detailed Screen

- Click on the **X** column of all enrollment records in the detailed area on the right.

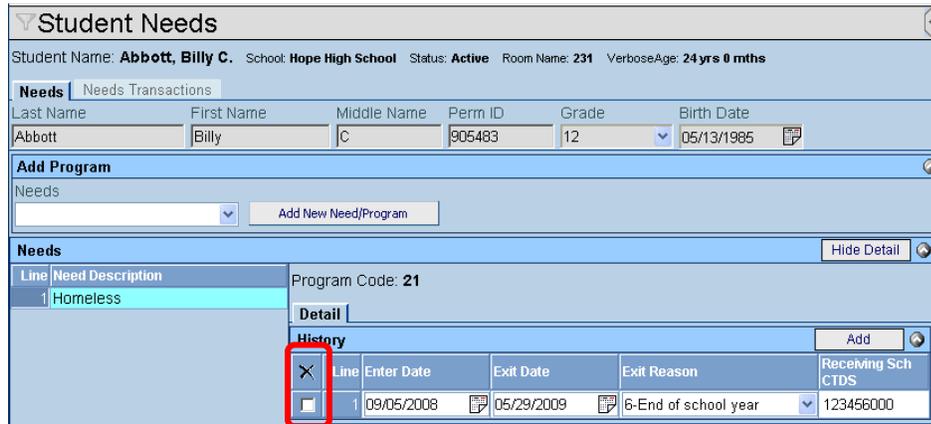


Figure 9.40 – Student Needs, Detailed Screen

- Click the **Save** button at the top of the screen to delete the record, or click the **Undo** button to cancel the operation without deleting the record.

# MENU OPTIONS

At the top of the Student Needs screen, a **Menu** button provides access to additional information regarding the student's records.



Figure 9.41 – Student Needs Screen, Menu Options

The option available under the Menu button is:

- **Screen Audit Detail For Student Needs** – the Audit Trail History screen lists all of the changes made to the student's records, what was changed, who changed it, and the date and time the change was made. It is the same audit trail report available through the Student screen. Since the Needs/Program information is stored in a grid, it is not yet available for tracking via the audit detail report.

Audit Trail History						
Properties						
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name
1	Student	HomeLanguage	Update	01	00	Wilson, Rob
2	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob
3	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
4	Student	GridCode	Update	741B	741B	Wilson, Rob
5	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
6	Student	GridCode	Update	741B	741B	Wilson, Rob
7	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
8	Student	GridCode	Update	741B	741B	Wilson, Rob
9	Student	GridCode	Update	741B	741B	Wilson, Rob
10	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
11	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob
12	Student	GridCode	Update	741B	741B	Wilson, Rob
13	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
14	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob
15	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob
16	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
17	Student	GridCode	Update	741B	741B	Wilson, Rob
18	Student	MailAddressGU	Update	<Link>	<Link>	Wilson, Rob
19	Student	HomeAddressGU	Update	<Link>	<Link>	Wilson, Rob
20	Student	GridCode	Update	99999	99999	Wilson, Rob

Figure 9.42 – Audit Trail History for Student Needs

The **Print button** at the top of the screen may be used to print the information on the Student Needs screen.



Figure 9.43 – Print Button

The Print button prints the information exactly as it is displayed on the screen, and does not show the information available using the scroll bars.

Menu [Navigation Icons] Save Undo [Warning Icon] Form Status: Ready (Update Mode)

**Student Needs**

Student Name: **Abbott, Billy C.** School: Hope High School Status: Active Room Name: 231 VerboseAge: 24 yrs 0 mths

Needs Needs Transactions

Last Name	First Name	Middle Name	Perm ID	Grade	Birth Date
Abbott	Billy	C	905483	12	05/13/1985

Add Program

Needs [Dropdown] Add New Need/Program

Needs [Show Detail]

X	Line	Need Description	Program Code	Enter Date	Exit Date	Exit Reason	Receiving Sch CTDS
<input type="checkbox"/>	1	Homeless	21st Century program	09/05/2008			123456000

Figure 9.44 – Printed Student Needs Screen



# Chapter Ten: WORKING WITH ALL STUDENT PROGRAMS

In this chapter, the following topics are covered:

- ▶ How to run a mass update of student programs
- ▶ How to screen a summary of all student programs

# HOW TO MASS UPDATE STUDENT PROGRAMS

The Mass Update Student Programs screen provides a convenient way to enter the exit date and exit reason (if required) to withdraw all students from a program. This is particularly helpful at the end of the year, when all students are required to be withdrawn from the programs. It can also be used to “open” or remove all exit dates. To run the mass update:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.



Figure 10.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 10.2 – Synergy SIS Folder



Figure 10.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.

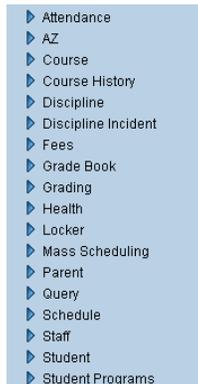


Figure 10.4 – Student Programs Folder



Figure 10.5 – Student Programs Folder Expanded

4. Click on the **Mass Update Student Programs** screen and the screen appears in the content pane on the right-side of the screen.

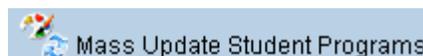


Figure 10.6 – Mass Update Student Programs Screen Icon

5. Select whether to **Close** (enter the exit dates) or **Open** (remove the exit dates) for the selected programs from the **Action** drop-down list. The exit date that will be entered for each program is the last valid school day for the school in which the student is enrolled.



Figure 10.7 – Mass Update Student Programs Screen

6. Check the **Include in Process** box on the **Childhood Programs** tab to modify the exit dates for Childhood Program Participation records.
7. Click on the **English Language Learners** tab and check the **Include in Process** box to modify the exit dates for the English Language Learners records.

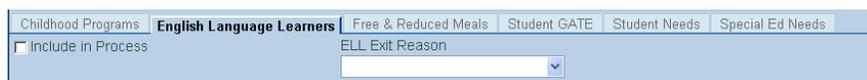


Figure 10.8 – Mass Update Student Programs Screen, English Language Learners Tab

8. Select the exit reason to be entered for the ELL records from the **ELL Exit Reason** drop-down list.
9. Click on the **Free & Reduced Meals** tab and check the **Include in Process** box to modify the exit dates for the Free and Reduced Meals records.



Figure 10.9 – Mass Update Student Programs Screen, Free & Reduced Meals Tab

10. Click on the **Student GATE** tab and check the **Include in Process** box to modify the exit dates for the Student GATE records.



Figure 10.10 – Mass Update Student Programs Screen, Student GATE Tab

11. Select the exit reason to be entered for the Student GATE records from the **GATE Exit Reason** drop-down list.
12. To only process specific grade levels, check the grade levels to be processed in the **Grade Filter** box.
13. Click on the **Student Needs** tab and check the **Include in Process** box to modify the exit dates for the Student Needs records.

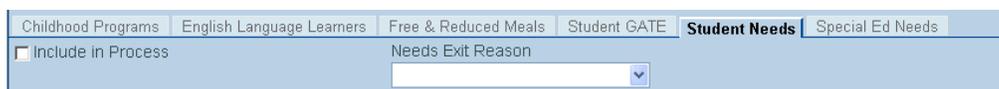


Figure 10.11 – Mass Update Student Programs Screen, Student Needs Tab

14. Select the exit reason to be entered for the Student Needs records from the **Needs Exit Reason** drop-down list.
15. Click on the **Special Ed Needs** tab and check the **Include in Process** box to modify the exit dates for the Special Ed Student Services records.



Figure 10.12 – Mass Update Student Programs Screen, Special Ed Needs Tab

16. Select the exit reason to be entered for the Special Ed Student Services records from the **Special Ed Exit Reason** drop-down list.
17. Click the **Update Programs** button at the top of the screen to withdraw all students in the currently focused high school from the student programs selected.

## STUDENT PROGRAMS SUMMARY

The Student Programs Summary screen lists the transactions that have been generated for a student for all student programs. To access the Student Programs Summary screen:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the screen.

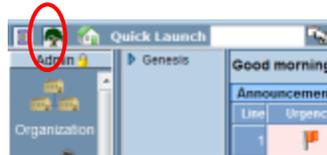


Figure 10.13 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

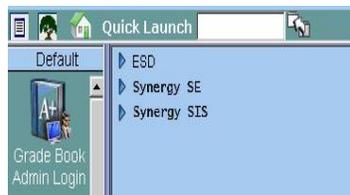


Figure 10.14 – Synergy SIS Folder



Figure 10.15 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.

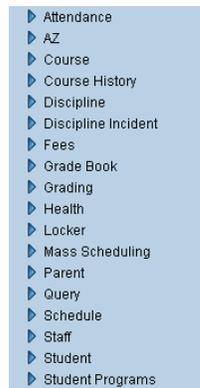


Figure 10.16 – Student Programs Folder



Figure 10.17 – Student Programs Folder Expanded

- Click on the **Student Program Summary** screen and the screen appears in the content pane on the right-side of the screen.

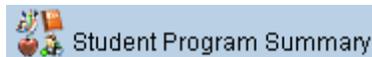


Figure 10.18 – Student Program Summary Screen Icon

- Check to make sure the current **focus** is set to a school and not the district. The focus is indicated in the top right-hand corner of the screen.



Figure 10.19 – Checking Current Focus

- Find the student for which to enter the needs & programs using either the **Scroll or Find** method.



Figure 10.20 – Student Program Summary Screen

- The Student Program Summary displays all student program transactions that have been uploaded to the state for the student. This includes the transactions for Childhood Program Participation, English Language Learners, Free and Reduced Meals, Special Ed Student Transactions, Student Needs, and Student GATE.

**Student Program Summary**

Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Room Name: Age: **17 yrs 11 mths**

**Student Programs**

Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Perm ID: **905483** Grade: **12** Gender: **Male** Birth Date: **05/13/1992**

Auto Generate Needs:  As Of Date:  **Go To Date**

**Childhood Program Participation Transaction Detail**

Line	Fiscal Year	Start Date	Program	Entry Date	Exit Date	CTDS	Family Income	LevelHousehold	Mother Emp Status	Fathe Emp Status	Organization Name	Error

**English Language Learners Transaction Detail**

Line	Fiscal Year	Start Date	Program Code	Participation Status	Entry Date	Exit Date	Exit Reason	Organization Name	Error
1	07/01/2009		Structured or Sheltered English Immersion	New	09/07/2009	04/30/2010	2-Withdrawn from school	Hope High School	

**Free and Reduced Meals Transaction Detail**

Line	Fiscal Year	Start Date	Need	Entry Date	Exit Date	Receiving School CTDS	Grade	Organization Name	Error
1	07/01/2009		NCLB Indicator 2	09/08/2009	04/30/2010			Hope High School	

**Special Ed Student Transaction Detail**

Line	Fiscal Year	Start Date	Need	Service Type	Entry Date	Exit Date	Exit Reason	Grade	Organization Name	Error
1	07/01/2009		Hearing Impairment	Services provided in regular classroom. (sc)	12/07/2009	04/30/2010	Moved, known to be continuing	12	Hope High School	

**Student Needs Transaction Detail**

Line	Fiscal Year	Start Date	Need	Program Code	Enter Date	Exit Date	Exit Reason	Receiving School CTDS	School	Error

**Student Gate Transaction Detail**

Line	Enter Date	Gate Code	Gate Grade	Exit Date	Exit Reason	Test	FS	Partial	Screen	MC	Test Comment	Super Title

**LEGEND**  
 Bolded Text: Calculated Values  
 Highlighted Row: Indicates an Error condition

Figure 10.21 – Student Program Summary Screen

- By default, the screen displays all of the transactions that have been created for the school in focus, and all transactions for the year up to the current date. To list the transactions uploaded up through a previous date (removing all transactions from the screen that were uploaded after that date), enter the new date in the **As Of Date** box in MM/DD/YY format. The date can also be selected by clicking on the Calendar  button. Then click on the **Go To Date** button to change the screen.
- Values that are bolded are calculated values as opposed to manually entered values. If an entire row is highlighted, it indicates there is an error in the transaction and it has not been uploaded correctly.



# Chapter Eleven: REPORTS

In this chapter, the following topics are covered:

- ▶ What are the available SAIS & Student Programs reports
- ▶ How to customize the reports before printing

## AVAILABLE REPORTS

The available reports for SAIS and Student Programs are found in four locations. Three of these locations are under the AZ folder, and one under the Student Programs folder. Under the AZ folder, the reports can be found in the Attendance Info folder, The Programs Info Folder, and the SAIS folder. Under the Student Programs folder, the reports are found under the Reports folder.

Report Folders		
AZ >	Attendance Info >	Reports
AZ >	Programs Info >	Reports
AZ >	SAIS >	Reports
Student Programs >	Reports	

There are also four types of reports available – individual, list, summary and extract. Individual reports print out information about a single student per page, but can be printed for multiple students at one time. List reports generate lists of multiple students, generally one student's information per line. Summary reports summarize student data into statistics and numbers. Extracts pull information out into a data file that can be used in another program.

## ATTENDANCE INFO REPORTS

The Attendance Info reports summarize the attendance information that is reported to the state. These reports are similar to the ADMS72 reports from the SAIS system, and summarize the school and district ADM and ADA. The available reports are:

- ADM475 – Average Daily Membership
- ADM601 – Cumulative ADM/Absence Rate Report
- ADM602 – Student Count Report
- ADM640 – Current Year ADM
- ADM675 – Average Daily Membership Summary

To access the Attendance Info reports:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

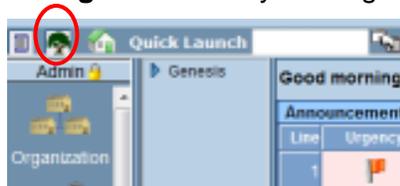


Figure 11.1 – Synergy SIS Navigation Tree

- Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

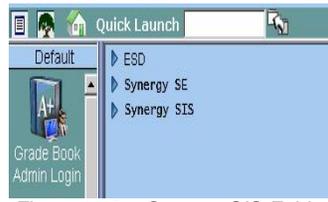


Figure 11.2 – Synergy SIS Folder



Figure 11.3 – Synergy SIS Folder Expanded

- Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 11.4 – AZ Folder

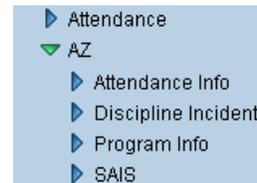


Figure 11.5 – AZ Folder Expanded

- Under the AZ folder, open the **Attendance Info** folder by clicking on the blue triangle pointing right, next to the words Attendance Info. Once clicked, the triangle turns green and points downward.

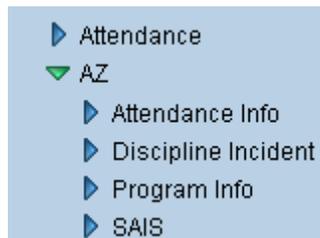


Figure 11.6 – Attendance Info Folder

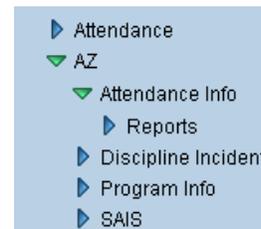


Figure 11.7 – Attendance Info Folder Expanded

- Under the Attendance Info folder, open the **Reports** folder by clicking on the blue triangle pointing right, next to the word Reports. Once clicked, the triangle turns green and points downward.



Figure 11.8 – Reports Folder

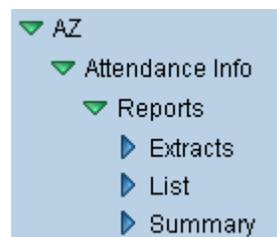


Figure 11.9 – Reports Folder Expanded

1. To access the Extracts reports, click on the blue triangle next to the word **Extracts**. To access the List reports, click on the blue triangle next to the word **List**. To access the Summary reports, click on the blue triangle next to the word **Summary**.

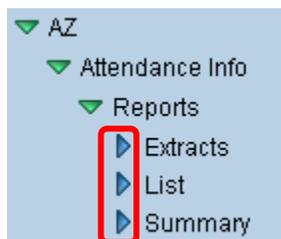


Figure 11.10 – List & Summary Folders

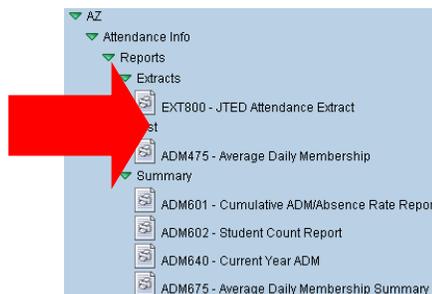


Figure 11.11 –List & Summary Folders Expanded

2. Click on the **name of the report** to open the report and select the options to be used in printing the report.
3. Once the report options have been set, click on the **Print** button to print the report. The report is printed as a PDF file to the screen, which can then be sent to the printer.



**Reference:** This chapter covers only the customizations specific to each of the reports used in the State of Arizona Data Reporting, and the additional options available on the other tabs are explained in the manual titled *Synergy SIS – Query & Reporting Guide*.

## EXT800 – JTED Attendance Extract

The JTED Attendance Extract report generates a file for upload for all students with JTED attendance & demographics. It also prints a PDF report with student contact information.

Phone:					
Fax:					
Student Name:			Home Phone:		Date:
Date Of Birth:			Home Address:		
Student No.:					
Age	Gender	Grade	Current Program	Home School	Attending School
Primary Language - Date Determined			Home Language - Date Determined		
Parent/Guardian					
Name		Home Phone		Name	
Address		Work Phone		Address	
		Emergency Phone		Emergency Phone	

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Figure 11.12 – JTED Attendance Extract

For more information about configuring and extracting JTED data, please see the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

**Report Interface**

Name: **JTED Attendance Extract**    Number: EXT800    Page Orientation: Portrait

Options | Sort / Output | Conditions | Selection | Advanced

JTED CTDS Number

**Leave Date Option Details**

Use Section Leave Date

By Default the extract will calculate the leave date based on the rules defined in the JTED documentation. Those rules are as follows:

1. Use first day of following term for students expected to complete current term  
-- This is the first valid school day following the term
2. Use the day after last day of school for students expected to complete final term  
-- This would be the first day after the school calendar
3. For students who exit their JTED ADM course in the middle of a term, use the first school day after their last JTED ADM day in that course.  
-- This is the first valid school day following the class leave date

If this option is selected then the Leave Date used in GENESIS will be used.

Figure 11.13 – JTED Attendance Extract, Report Interface

## ADM475 – Average Daily Membership

The ADM475 reports lists each student by school and grade, and summarizes the number of member days, absence days, ADM for each student, the Adjusted ADM for each student, and the ADA.

Edupoint School District		Hope High School Average Daily Membership										Year: 2008-2009 Report: ADM475		
100th Day Report														
School Name: Hope High School													Report Start Date: 10/29/2008	
School Code: 273													Report End Date: 02/05/2009	
Grade: 12 Register Code: 0000 Tuition Payer Code: 1														
State Student Number	Name	SIS Number	Membership Start	EC	Membership End	LC	FTE	Homebound	Mbr Days	Abs Days	ADM	Adjusted ADM	ADA	
0001293166	Hancock, Sandra J.	873379	11/04/2008	E1	11/04/2008		0.75	N	45.00	0.00	0.75	0.75	0.75	
0019850184	Kellar, Joyce L.	125038	11/24/2008	E11	12/19/2008		0.25	N	10.50	0.00	0.18	0.18	0.18	
0001215186	Knudsen, Alan D.	878209	11/07/2008	E1	11/07/2008		0.50	N	30.00	0.00	0.50	0.50	0.50	
0001306114	(Ramirez, Janet D.)	880521	11/18/2008	E3	11/19/2008	W1	0.25	N	4.75	0.00	0.08	0.08	0.08	
0001259597	Valdez, Kathryn G.	911098	11/24/2008	R1	11/24/2008		0.50	N	21.00	0.00	0.35	0.35	0.35	
0001259597	Valdez, Kathryn G.	911098	11/25/2008	R1	12/19/2008		0.25	N	10.50	0.00	0.18	0.18	0.18	
<b>Register Totals:</b>									121.75	0.00	2.04	2.04	2.04	
<b>School Totals:</b>									192.25	0.00	3.21	3.21	3.21	

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Figure 11.14 - ADM475 – Average Daily Membership Report



**Note:** When the ADM475 report is run, it also automatically runs the ADM675 report, the Average Daily Membership Summary. While the ADM675 report does not automatically pop-up on screen with the ADM475 report, it can be accessed from the Job Queue screen.

Options that can be selected when printing the ADM475 report are:

The screenshot shows the 'Report Interface' for 'Average Daily Membership' (Number: ADM475, Page Orientation: Landscape). The interface is divided into several sections:

- Options:** Includes tabs for 'Sort / Output', 'Conditions', 'Selection', and 'Advanced'.
- Report Range:** Contains a 'Report Period' dropdown, 'Report Start Date' and 'Report End Date' fields with calendar icons, and a 'Grade Range' dropdown.
- Advanced:** Contains several checkboxes:
  - Do Not Show Homebound
  - Eligible for state funding
  - Ineligible for state funding
  - Foreign exchange student
  - Non-special education students in residential treatment centers
  - JTED/Non-Resident Charter (concurrent)
  - District of Residence: [ ]
- Absence Definition:** Contains four 'Reason Type' dropdowns and a list of 'Absence Reasons' with checkboxes:
  - Other
  - Illness
  - Suspension
  - Exc Tardy
  - Busspend
  - Unverified
  - Couns/admi
  - Excused
  - Waived
  - Tardy
  - Unexcused
  - Activity

Figure 11.15 - ADM475 – Average Daily Membership, Report Interface

- **Date Range** – to select the dates to be included in the report, either select one of the pre-configured ranges available in the **Report Period** drop-down or create a custom range using the **Report Start Date** and **Report End Date** boxes. The dates should be entered in the format M/D/YY or may be selected by clicking the Calendar  button. The ranges available in the Report Period drop-down are: **40<sup>th</sup> Day**, **100<sup>th</sup> Date**, and **Year-to-Date**. Select **Custom** to use the dates entered in the start and end date fields.
- **Grade Range** – select the range of grades to be included in the report.
- **Tuition Payer Code** – check off the tuition payer codes that should be included in the report. For a valid ADMS72 report comparison, check the Eligible for state funding box and the JTED/Non-Resident Charter box.
- **Homebound** – if homebound students should not be include in the report, check the box labeled **Do Not Show Homebound**.
- **District of Residence** – to filter the students by the district of residence listed in their enrollment record, enter the district of residence to display in this field.
- **Absence Reasons** – either select the categories of absences from the **Reason Type** drop-downs, or check off individual absences reasons. To check or uncheck all absence reasons, use the   boxes. The blank box un-checks all boxes, and the checked box checks all boxes. If the purpose of the report is to compare it against the ADMS72 report from the state, select Unverified, Excused, and Unexcused from the Reason Type drop-downs as this will mirror the information collected at the state.

## ADM601 – Cumulative ADM/Absence Rate Report

The ADM601 report lists all schools and summarizes their ADM and Absence Rate for Day 1, Day 20, Day 40, Day 60, Day 80 and Day 100.

SCHOOL	Day 1	Day 20		Day 40		Day 60		Day 80		Day 100	
	ADM	ADM	ABSENCE RATE								
Hope High School	0.00	17.30	0.00%	16.62	0.00%	19.46	0.00%	19.48	0.00%	15.60	0.00%
09-12	0.00	17.30	0.00%	16.62	0.00%	19.46	0.00%	19.48	0.00%	15.60	0.00%
<b>Total District</b>	<b>0.00</b>	<b>17.30</b>	<b>0.00%</b>	<b>16.62</b>	<b>0.00%</b>	<b>19.45</b>	<b>0.00%</b>	<b>19.48</b>	<b>0.00%</b>	<b>15.60</b>	<b>0.00%</b>

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Figure 11.16 - ADM601 – Cumulative ADM/Absence Rate Report

The only option available for this report is to filter it by the district of residence listed in the student’s enrollment record. If blank, all students are included. Otherwise, only students with the district of residence entered are included.

**Report Interface** ⏪

Name: **Cumulative ADM/Absence Rate Report** Number: **ADM601** Page Orientation: **Landscape**

Options | Sort / Output | Conditions | Selection | Advanced

District of Residence

Figure 11.17 - ADM601 – Cumulative ADM/Absence Rate, Report interface

## ADM602 – Student Count Report

The ADM602 report summarizes the number of active students, the gain & loss for the date range, and the absence rate by grade and by school.

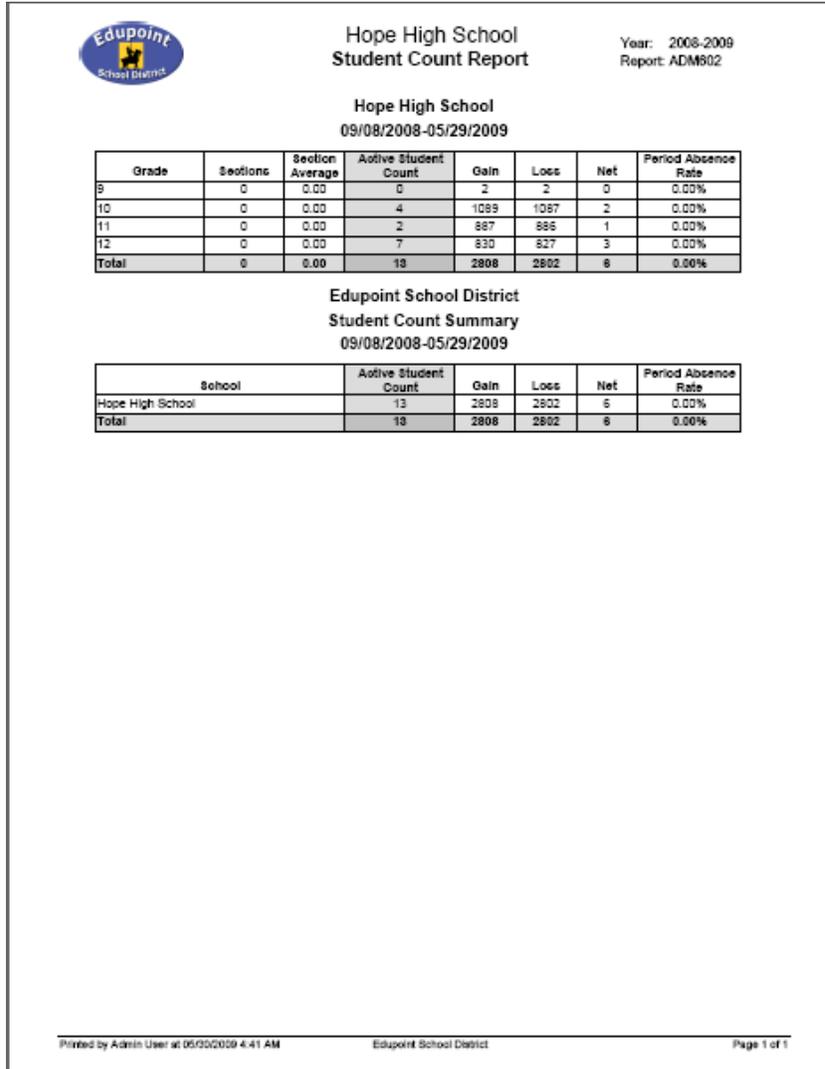
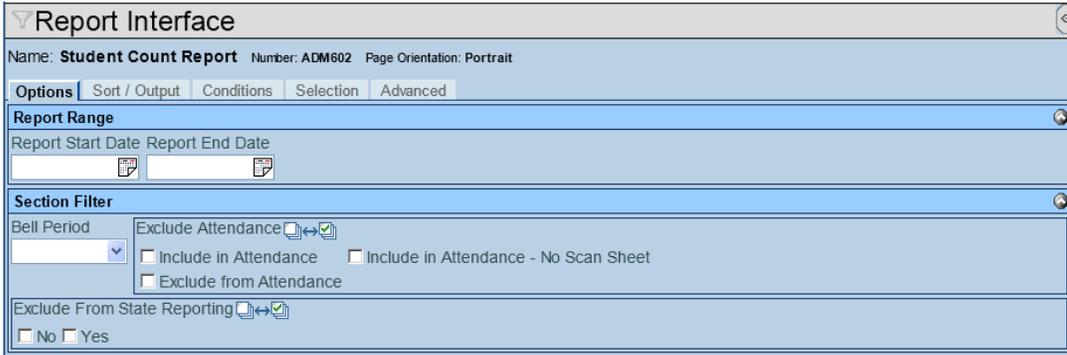


Figure 11.18 - ADM602 – Student Count Report

The ADM640 may be customized with the following options:



The screenshot shows the 'Report Interface' for a 'Student Count Report'. The interface includes a header with the report name, number (ADM602), and page orientation (Portrait). Below the header are tabs for 'Options', 'Sort / Output', 'Conditions', 'Selection', and 'Advanced'. The 'Options' tab is active, showing two main sections: 'Report Range' and 'Section Filter'. The 'Report Range' section has fields for 'Report Start Date' and 'Report End Date', each with a calendar icon. The 'Section Filter' section has a 'Bell Period' dropdown menu, a 'Exclude Attendance' checkbox (checked), and two sub-sections: 'Include in Attendance' and 'Exclude from Attendance', both with unchecked checkboxes. At the bottom of the 'Section Filter' section is an 'Exclude From State Reporting' checkbox (checked) and a 'No/Yes' selection area.

Figure 11.19 - ADM602 – Student Count, Report Interface

- Enter the **Report Start Date** and the **Report End Date** in the format M/D/YY or select them by clicking the Calendar  button to only count the students enrolled during a specific timeframe.
- To only count students attending classes in a specific period, select the period from the **Bell Period** drop-down list.
- To only include students enrolled in sections marked as excluded or include in attendance, check the options to include from the **Exclude Attendance** section.
- To only include students enrolled in sections that are either excluded or included in state reporting, select the section status in the **Exclude From State Reporting** section.

## ADM640 – Current Year ADM

The ADM640 report shows the average daily membership and average daily attendance numbers by grade for the district.

		Average Daily Membership			Average Daily Attendance			
		Y T D	Period 01	Period 02	Y T D	Period 01	Period 02	Abs %
9		0.6532	0.0000	0.3833	0.6532	0.0000	0.3833	0.0000
10		1,047. 1757	1,061. 8500	1,044. 8333	1,033. 4054	1,002. 3500	1,033. 7000	1.3150
11		870.3874	877.9500	868.1333	857.4955	822.8250	857.2667	1.4812
12		824.5046	827.1250	823.3167	811.4550	772.0000	812.3833	1.5935
<b>Totals</b>								
<b>KG:</b>								
<b>01 - 08:</b>								
<b>Total Elem:</b>								
<b>School</b>		2,742. 8108	2,766. 9250	2,736. 8667	2,703. 0090	2,597. 1750	2,703. 7333	1.4511

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Figure 11.20 – ADM640 – Current Year ADM Report

The ADM640 may be customized with the following options:

Figure 11.21 - ADM640 – Current Year ADM, Report Interface

- **Date Range** - Select a custom date range to be used for the report. Enter the Report Start Date and the Report End Date in the format M/D/YY or select them by clicking the Calendar button.
- **Absence Reasons** – either select the categories of absences from the **Reason Type** drop-downs, or check off individual absences reasons. To check or uncheck all absence reasons, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes. If the purpose of the report is to compare it against the ADMS72 report from the state, select Unverified, Excused, and Unexcused from the Reason Type drop-downs as this will mirror the information collected at the state.

## ADM675 – Average Daily Membership Summary

The ADM675 report is identical to the ADM475 report except it presents the information summarized by grade, track and school instead of listing every student. It lists the total number of member days, absence days, the ADM Total, the Adjusted ADM Total and the ADA Total.

Register	Mbr Days	Abs Days	ADM Total	Adjusted ADM Total	ADA Total
<b>Grade: 9</b>					
9:0000:1	0	0.00	0.00	0.00	0.00
<b>Grade Totals:</b>	<b>0</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Grade: 10</b>					
10:0000:1	70.50	0.00	1.17	1.17	1.17
<b>Grade Totals:</b>	<b>70.50</b>	<b>0.00</b>	<b>1.17</b>	<b>1.17</b>	<b>1.17</b>
<b>Grade: 11</b>					
11:0000:1	0	0.00	0.00	0.00	0.00
<b>Grade Totals:</b>	<b>0</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Grade: 12</b>					
12:0000:1	121.75	0.00	2.04	2.04	2.04
<b>Grade Totals:</b>	<b>121.75</b>	<b>0.00</b>	<b>2.04</b>	<b>2.04</b>	<b>2.04</b>
<b>School Totals:</b>	<b>192.26</b>	<b>0.00</b>	<b>3.21</b>	<b>3.21</b>	<b>3.21</b>

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Figure 11.22 - ADM675 – Average Daily Membership Summary Report



**Note:** When the ADM675 report is run, it also automatically runs the ADM475 report, the Average Daily Membership Summary. While the ADM475 report does not automatically pop-up on screen with the ADM675 report, it can be accessed from the Job Queue screen.

Options that can be selected when printing the ADM475 report are:

The screenshot shows the 'Report Interface' for 'Average Daily Membership Summary' (ADM675). The interface is divided into several sections:

- Report Range:** Includes a 'Report Period' dropdown set to '100th Day', 'Report Start Date' and 'Report End Date' input fields with calendar icons, and a 'Grade Range' dropdown.
- Advanced:** Contains checkboxes for 'Do Not Show Homebound', 'Eligible for state funding', 'Foreign exchange student', 'JTED/Non-Resident Charter (concurrent)', and 'Show Summary (ADM475)'. It also has a 'District of Residence' input field and a note: 'Leaving District of Residence blank means no filtering will be done based on District of Residence. A valid entry is a 9 digit number (including the 000 at the end). Example - 123456000'.
- Absence Definition:** Features four 'Reason Type' dropdowns (Unverified, Excused, Unexcused, Positive) and a grid of 'Absence Reasons' checkboxes: Other, Illness, Suspension, Exc Tardy, Busspend, Unverified, Couns/admi, Excused, Waived, Tardy, Unexcused, and Activity.

Figure 11.23 - ADM675 – Average Daily Membership Summary, ReportInterface

- **Date Range** – to select the dates to be included in the report, either select one of the pre-configured ranges available in the **Report Period** drop-down or create a custom range using the **Report Start Date** and **Report End Date** boxes. The dates should be entered in the format M/D/YY or may be selected by clicking the Calendar  button. The ranges available in the Report Period drop-down are: **40<sup>th</sup> Day**, **100<sup>th</sup> Date**, and **Year-to-Date**. Select **Custom** to use the dates entered in the start and end date fields.
- **Grade Range** – select the range of grades to be included in the report.
- **Tuition Payer Code** – check off the tuition payer codes that should be included in the report. For a valid ADMS72 report comparison, check the Eligible for state funding box and the JTED/Non-Resident Charter box.
- **Homebound** – if homebound students should not be include in the report, check the box labeled **Do Not Show Homebound**.
- **District of Residence** – to filter the students by the district of residence listed in their enrollment record, enter the district of residence to display in this field.
- **Absence Reasons** – either select the categories of absences from the **Reason Type** drop-downs, or check off individual absences reasons. To check or uncheck all absence reasons, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes. If the purpose of the report is to compare it against the ADMS72 report from the state, select Unverified, Excused, and Unexcused from the Reason Type drop-downs as this will mirror the information collected at the state.

## AZ SAFE EXTRACT

Starting in FY2009, the state of Arizona implemented the AZ Safe program to track student disciplinary incidents. The data needed for upload to the AZ Safe program is entered through the Discipline Incident screens, and the setup for these screens is outlined in the *Synergy SIS – Discipline and Conference Administrator Guide*. Once the data has been captured, it is uploaded by extracting a file from Synergy SIS and uploading the file through the AZ Safe web interface. To create the extract file for uploading:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.



Figure 11.24 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 11.25 – Synergy SIS Folder



Figure 11.26 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 11.27 – AZ Folder



Figure 11.28 – AZ Folder Expanded

- Under the AZ folder, open the **Discipline Incident** folder by clicking on the blue triangle pointing right, next to the words Discipline Incident. Once clicked, the triangle turns green and points downward.

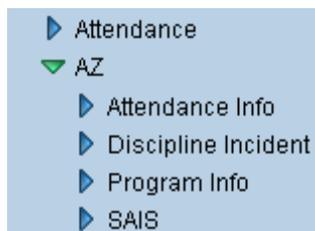


Figure 11.29 – Discipline Incident Folder

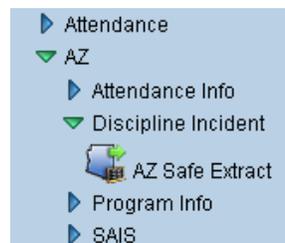


Figure 11.30 – Discipline Incident Folder Expanded

- Click on the **AZ Safe Extract** program icon.



Figure 11.31 – AZ Safe Extract Program Icon

- The AZ Safe Extract screen displays.

Figure 11.32 – AZ Safe Extract Screen

- Enter the **Fiscal Year** for the file to be generated as a 4-digit year such as 2010.
- Select whether to include **All Data** or **Mandatory Data Only** from the **Submission Type** drop-down list.
- Select whether to identify students using their **Person ID** or their **SAIS ID** from the **Student ID Type**. The Person ID is a randomly generated ID only used for the AZ Safe Extract.
- To use the **Access 504** drop-down on the Enrollment tab of the Student screen to flag students as SPED instead of their service participation in the Special Ed Student Services screen, check this box. If the drop-down is blank, the student will not be flagged. Any other value will flag the student.
- To calculate the disposition days, select an option from the **Disposition Days Calculation** drop-down. It can either only **Calculate Missing**, or **Recalculate All**. By default, no calculation is done.
- If calculating the disposition days, check the **Update Calculated Days in Database** to also enter the calculated days in the disposition records.

13. If calculating the disposition days, check **Split Disposition Days Evenly Over All Associated Violations** to assign the days equally amongst all the violations associated with the disposition.
14. If a disposition was not assigned to a discipline incident, a default disposition can be assigned. Select the **Student Default Disposition**, **Other Person Default Disposition**, and **Victim Default Disposition** from the drop-down lists. Only dispositions not requiring additional information are available for selection.
15. Click the **Get XML** button at the top of the screen to generate the extract.
16. The Job Result screen displays the two files that are generated by the extract. The **AZ Safe Extract Log** is the file that can be uploaded to the AZ Safe website. Click on the icon in the Result column and then save the file that opens up as a text file.

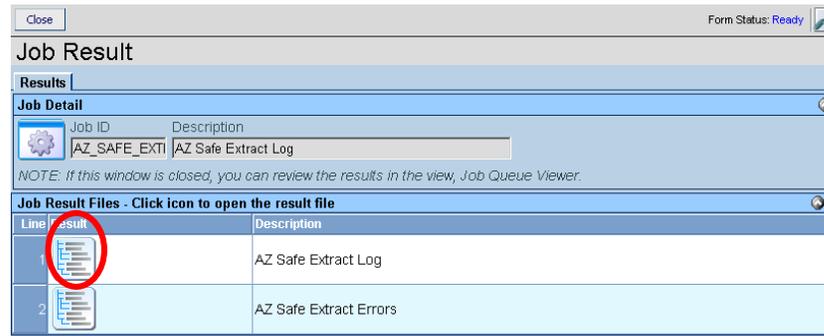


Figure 11.33– Job Result Screen

17. The **AZ Safe Extract Errors** file lists the errors that occurred when creating the file. Click on the icon in the Result column to see the list of errors. Look for the word **ERROR** in the file to see what errors occurred and correct the errors before regenerating the extract.

```

- <AZSafeErrors TransactionType="ReplaceAll" SubmissionOption="ALLWUQID" date="2010-04-
23T20:29:25.20" ownerCTDS="123456000" schoolCTDS="123456273" FiscalYear="2010">
- <incident SMSIncidentID="2">
  <incdate>2009-10-10</incdate>
  <inctime>19:15:00</inctime>
  <refdate>2009-10-10</refdate>
  <reffname>David</reffname>
  <reflname>Jones</reflname>
  <location_other>Football field</location_other>
  <gangrelated>0</gangrelated>
  <haterrelated>0</haterrelated>
- <person SMSPersonID="2009000000000000002">
  <persontype>2</persontype>
  <role>1</role>
  <disabled504>0</disabled504>
  <gender>M</gender>
  <dob>1992-07-16</dob>
  <fname>Albert</fname>
  <lname>Adams</lname>
  <mname>Robert</mname>
  <reltoschool>15</reltoschool>
  <injurysustained>0</injurysustained>
  <injuryserious>0</injuryserious>
- <violation ERROR="State Code is missing for violation id '2'." SMSViolationID="2">
  <primaryviolationind>0</primaryviolationind>
  </violation>
</person>

```

Figure 11.34– AZ Safe Extract Errors File

When staff are entering the discipline incident information, these are the common errors that should be avoided:

1. When selecting a violation code (discipline code), staff must select **at least two levels** for the discipline code. For example, they can't select just the Other Violation of School Policies option. They must also select one of the discipline codes underneath that category such as Disruption.
2. Every violation should have an associated **disposition**.
3. When adding a disposition, the selected **disposition code** must be at least two levels. For example, they can't just select Removal. They must also select one of the disposition codes under that category such as Expulsion without Service.
4. When selecting an **“other” discipline or disposition code**, a description should be entered in the additional text box.

Common errors that display in the error log are:

- **XML is not valid “Data at the root level is invalid. Line1, position1.”** – to fix this, be sure to save the extract file as a text document.
- **ERROR= “State Code is missing for violation id x”** – either the Report to State option or the State Code is missing in the discipline code listed in the incident. Go to the District Discipline Code Setup screen, found under Synergy SIS > Discipline Incident > Setup, and correct the missing data.
- **ERROR= “No dispositions associated with violation”** – either the Offender or Victim does not have a disposition assigned, or the disposition code selected does not have an assigned state code, or the disposition code was not marked as Report to State. For the first problem, make sure staff assign a disposition to all incidents. For the other issues, go to the District Disposition Code Setup screen, found under Synergy SIS > Discipline Incident > Setup, and correct the missing data.
- **ERROR= “No reportable dispositions found for violation id x”** – either the disposition code selected does not have an assigned state code, or the disposition code was not marked as Report to State. Go to the District Disposition Code Setup screen, found under Synergy SIS > Discipline Incident > Setup, and correct the missing data.

For instructions on how to upload the file to AZ Safe, please see the AZ Safe Implementation Manual at:

<http://www.ade.az.gov/sa/health/AZSafeImplementManual.asp>

Once data has been uploaded for the district, the reports in the AZ Safe online system can be run for the district. Note that some of these reports require the student's SAIS ID, so if the upload used the Person ID option these reports cannot be run.

The discipline incidents included in the upload are any incidents with either a discipline or disposition code marked as Report to State, or any incident that is marked as involving an injury.

# PROGRAM INFO REPORTS

The Program Info Reports list students who are participating in the various programs. The reports available are:

- PGM401 – Need List
- PGM402 – Free and Reduced Meals List
- PGM403 – ELL List
- PGM404 – ELL Assessment List
- PGM405 – Early Childhood List
- PGM406 – Early Childhood Assessment List
- PGM407 – Special Education List
- PGM413 – ELL by Class
- PGM414 – ELL Assessment by Class

To access the available reports:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

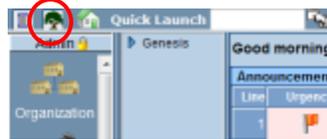


Figure 11.35 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 11.36 – Synergy SIS Folder



Figure 11.37 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.

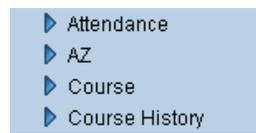


Figure 11.38 – AZ Folder



Figure 11.39 – AZ Folder Expanded

4. Under the AZ folder, open the **Program Info** folder by clicking on the blue triangle pointing right, next to the words Program Info. Once clicked, the triangle turns green and points downward.



Figure 11.40 – Program Info Folder

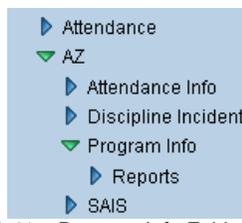


Figure 11.41 – Program Info Folder Expanded

- Under the Program Info folder, open the **Reports** folder by clicking on the blue triangle pointing right, next to the word Reports. Once clicked, the triangle turns green and points downward.



Figure 11.42 – Reports Folder

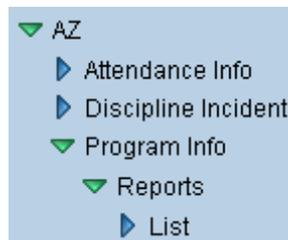
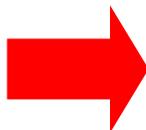


Figure 11.43 – Reports Folder Expanded

- To access the List reports, click on the blue triangle next to the word **List**.

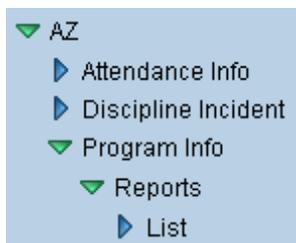


Figure 11.44 – List Folder



Figure 11.45 –List Folder Expanded

- Click on the **name of the report** to open the report and select the options to be used in printing the report.
- Once the report options have been set, click on the **Print** button to print the report. The report is printed as a PDF file to the screen, which can then be sent to the printer.



**Reference:** This chapter covers only the customizations specific to each of the reports used in the State of Arizona Data Reporting, and the additional options available on the other tabs are explained in the manual titled *Synergy SIS – Query & Reporting Guide*.

## PGM401 – Need List

The PGM401 reports lists all students listed under the Student Needs screen, with the program they are using and their enter and exit dates.

Service Type	Student Name	Grade	SAIS ID	SIS Number	Service Entry	Service Exit	Exit Reason
21st Century program	Abbott, Billy C.	12	0001341311	905483	05/29/2009	06/05/2009	
Group Total:		1					

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Figure 11.46 - PGM401 – Need List Report

Prior to printing, select the **Grade** range to display, and check off which **Needs** will be included in the report. To check or uncheck all needs, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

Report Interface

Name: **Need List** Number: **PGM401** Page Orientation: **Landscape**

Options | Sort / Output | Conditions | Selection | Advanced

**Filter Report**

Grade

Need

<input checked="" type="checkbox"/> Delinquent	<input checked="" type="checkbox"/> Evacuee	<input checked="" type="checkbox"/> Homebound
<input checked="" type="checkbox"/> Homeless	<input checked="" type="checkbox"/> Immigrant	<input checked="" type="checkbox"/> Language Arts (reading and/or writing)
<input checked="" type="checkbox"/> Language Arts (Verbal) Giftedness	<input checked="" type="checkbox"/> Math	<input checked="" type="checkbox"/> Migrant Education
<input checked="" type="checkbox"/> Neglected	<input checked="" type="checkbox"/> No Need	<input checked="" type="checkbox"/> Non-Verbal Reasoning Giftedness
<input checked="" type="checkbox"/> Other Academic Services	<input checked="" type="checkbox"/> Quantitative (Math) Giftedness	<input checked="" type="checkbox"/> Refugee
<input checked="" type="checkbox"/> Science	<input checked="" type="checkbox"/> Social Studies	<input checked="" type="checkbox"/> Unaccompanied Youth

Figure 11.47 - PGM401 – Need List, Report Interface

## PGM402 – Free and Reduced Meals List

The PGM402 report lists all students who have participated in the Free and Reduced Meals program this school year.

School Name: Hope High School		FRMCode: NCLB Indicator 2 (2)			
Grade	Student Name	SAIS ID	SIS Number	Service Entry	Service Exit
12	Abbott, Billy C.	0001341311	905483	09/09/2008	06/05/2009
Group Total:		1			
Report Total:		1			

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Figure 11.48 - PGM402 – Free and Reduced Meals List Report

Prior to printing, select the **Grade** range to display, and check off which **Codes** will be included in the report. To check or uncheck all codes, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

Report Interface

Name: **Free and Reduced Meals List** Number: **PGM402** Page Orientation: **Landscape**

Options | Sort / Output | Conditions | Selection | Advanced

**Filter Report**

Grade: 09 - 12

Free/Reduced Meal Codes

NCLB Indicator 1  NCLB Indicator 2

Figure 11.49 - PGM402 – Free and Reduced Meals List, Report Interface

### PGM403 – ELL List

The PGM403 reports lists all students who have participated in the ELL program this school year.

The screenshot shows the PGM403 ELL List Report for Hope High School. At the top left is the Edupoint School District logo. The title 'Hope High School ELL List' is centered, and 'Year: 2008-2009 Report: PGM403' is on the right. A box contains 'School Name: Hope High School'. Below is a table with columns: Grade, Student Name, SAIS ID, SIS Number, Need, Service Entry, Service Exit, and Withdrawal Reason. Two students are listed: Andrew Acevedo (Grade 11) and Billy C. Abbott (Grade 12), both with 'Structured or Sheltered English Imm' needs. Summary lines show 'Group Total: 2' and 'Report Total: 2'. The footer includes 'Printed by Admin User at 05/30/2009 5:12 AM', 'Edupoint School District', and 'Page 1 of 1'.

Grade	Student Name	SAIS ID	SIS Number	Need	Service Entry	Service Exit	Withdrawal Reason
11	Acevedo, Andrew	0001218156	886630	Structured or Sheltered English Imm	09/02/2008	05/29/2009	Withdrawn from school
12	Abbott, Billy C.	0001341311	905483	Structured or Sheltered English Imm	09/08/2008	05/29/2009	Withdrawn from school
Group Total:							2
Report Total:							2

Figure 11.50 - PGM403 – ELL List Report

Prior to printing, select the **Grade** range to display, and check off which **Needs/Programs** will be included in the report. To check or uncheck all codes, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

The screenshot shows the 'Report Interface' for the PGM403 ELL List. It includes a title bar with a close button, and a header with 'Name: ELL List', 'Number: PGM403', and 'Page Orientation: Landscape'. Below are tabs for 'Options', 'Sort / Output', 'Conditions', 'Selection', and 'Advanced'. The 'Filter Report' section has a 'Grade' filter set to '09 - 12'. Under 'Need', there are checkboxes for 'Structured or Sheltered English Immersion', 'Bilingual/Dual Language with Waiver 1', 'Bilingual/Dual Language with Waiver 2', 'Bilingual/Dual Language with Waiver 3', 'Mainstream', and 'Individual Language Learner Plan (ILLP)'. All checkboxes are currently checked.

Figure 11.51 - PGM403 – ELL List, Report Interface

## PGM404 – ELL Assessment List

The PGM404 report lists all ELL assessments recorded this school year.

Grd	Student Name	SAIS ID	SIS Number	Test Date	Overall	Overall Result	Type	Score	Prof Level
12	Abbott, Billy C.	0001341311	905483	10/18/2008	38	ELL After Re-classification (ELLAR)	Writing	26	Basic
							Reading	34	Intermediate
							Oral	43	Proficient
Group Total:								1	
Report Total:								1	

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Figure 11.52 - PGM404 – ELL Assessment List Report

This report can be filtered by **Grade** range prior to printing.

Report Interface

Name: **ELL Assessment List**    Number: **PGM404**    Page Orientation: **Landscape**

Options | Sort / Output | Conditions | Selection | Advanced

**Filter Report**

Grade

[Dropdown] - [Dropdown]

Figure 11.53 - PGM404 – ELL Assessment List, Report Interface

## PGM405 – Early Childhood List

The PGM405 reports lists all students who have participated in the Early Childhood Program this school year.

<div style="float: right; text-align: right;">                     Pinnacle Pre-School  <b>Early Childhood List</b>                      Year: 2008-2009                      Report: PGM405                 </div>										
School Name: <b>Pinnacle Pre-School</b>										
Grd	Student Name	SAIS ID	SIS Number	Service Entry	Service Exit	Father Emp Status	Mother Emp Status	Family Income	Lives in House	Program CTDS
PS	Ramada, Keith		997012	05/19/2009	05/29/2009	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Both	123456000
Group Total: <u>    </u> 1										

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Figure 11.54 - PGM405 – Early Childhood List Report

Prior to printing, select the **Grade** range to display, and check off which **Programs** will be included in the report. To check or uncheck all codes, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

Name: **Early Childhood List**    Number: **PGM405**    Page Orientation: **Landscape**

Options: **Sort / Output** | Conditions | Selection | Advanced

**Filter Report**

Grade: PS - PS

ProgramCode

Early Childhood Block Grant     State Family Literacy     Title I Even Start

Migrant Education Even Start

Figure 11.55 - PGM405 – Early Childhood List, Report Interface

## PGM406 – Early Childhood Assessment List

The PGM406 report lists all early childhood assessments recorded this school year.

Edupoint Educational Systems		Hope Childhood Center Early Childhood Assessment List				Year: 2007-2008 Report: PGM406										
School Name: <b>Hope Childhood Center</b>					Assessment Test Scores											
Student Name	SAIS ID	SIS Number	Assessment Type	Test Date	1	2	3	4	5	6	7	8	9	10	11	12
Villegaso, Joseann N.	277100030	61200105	Creative Curriculum Development	12/04/2007	7	9	8	10	6	10	14	6	8	12		
Vin, Paulette	288480020	700040008	Creative Curriculum Development	12/06/2007	8	10	8	10	6	10	16	6	12	14		
Walkerman, Zaran	254780058	61210006	Creative Curriculum Development	12/04/2007	8	10	8	10	6	10	16	6	13	15		
Washington, Connie	274500003	6128000303	Creative Curriculum Development	12/03/2007	7	9	8	9	6	6	9	4	10	8		
Whittman, Kari	2750006	61291003	Creative Curriculum Development	12/03/2007	7	10	7	9	5	8	8	3	8	11		
Yanp, Heather	2884004	700039003	Creative Curriculum Development	12/06/2007	8	10	9	16	8	9	19	6	13	13		
Yassa, Mohammed	2670006	61200086	Creative Curriculum Development	12/06/2007	5	10	8	6	5	6	12	5	11	10		
Zabara, Harold	288490008	7001101010	Creative Curriculum Development	12/06/2007	6	10	8	11	7	10	16	6	11	16		
Zamma, Alan E.	288480006	700140009	Creative Curriculum Development	12/03/2007	7	10	8	10	5	9	16	6	12	13		
Zapopatos, Josh A.	275313003	6129002020	Creative Curriculum Development	12/06/2007	6	10	8	6	5	8	14	6	11	9		
Zepeb, Roger	2884800255	700140030	Creative Curriculum Development	12/06/2007	8	10	10	13	6	10	17	6	12	14		
<b>Group Total:</b> _____ <b>408</b>																
<b>Report Total:</b> _____ <b>408</b>																

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Figure 11.56 – PGM406 Early Childhood Assessment List Report

This report can be filtered by **Grade** range prior to printing.

**Report Interface**

Name: **Early Childhood Assessment List** Number: **PGM406** Page Orientation: **Landscape**

Options | Sort / Output | Conditions | Selection | Advanced

**Filter Report**

Grade

PS - K

Figure 11.57 - PGM406 – Early Childhood Assessment List, Report Interface

## PGM407 – Special Education List

The PGM407 report lists all students who have participated in special education this school year.

Grd	Student Name	SAIS ID	SIS Number	Gen	Need	Srvc Type	Service Entry	Service Exit	Withdrawal Reason	DOR CTDS	DOR Start	DOR End	Fed Prim. Need
12	Abbott, Billy C.	000134131905483		M	Hi	A	10/30/2008	06/05/2009		123456000	09/02/2008	06/05/2009	<input type="checkbox"/>
Group Total: <u>1</u>													
Report Total: <u>1</u>													

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Figure 11.58 - PGM407 – Special Education List Report

Prior to printing, select the **Grade** range to display, and check off which **Needs** will be included in the report. To check or uncheck all codes, use the boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

Report Interface

Name: **Special Education List** Number: **PGM407** Page Orientation: **Landscape**

Options: Sort / Output | Conditions | Selection | Advanced

**Filter Report**

Grade: 09 - 12

Need:  All

- Autism
- Emotional Disability
- Emotional Disability (private school)
- Hearing Impairment
- Mild Mental Retardation
- Moderate Mental Retardation
- Multiple Disabilities
- Multiple Disabilities - Severe Sensory Impairment
- Orthopedic Impairment
- Other Health Impairment
- Preschool - Moderate Delay
- Preschool - Severe Delay
- Preschool - Speech/Language Delay
- Severe Mental Retardation
- Specific Learning Disability
- Speech/Language Impairment
- Traumatic Brain Injury
- Visual Impairment

Figure 11.59 - PGM407 – Special Education List, Report Interface

## PGM413 – ELL by Class

The PGM413 report prints a separate page for each class section, and on each class page lists the students from that class who are participating in the ELL program.

Edupoint School District		Hope High School ELL by Class		Year: 2010-2011 Report: PGM413						
School Name: Hope High School		Section ID: 0258		Teacher Name: Gardner, David						
Grd	Gen	Student Name	Perm ID	SAIS ID	Program Entry Date	Pgm Code	Participation Status	Program Exit Reason	Program Exit Date	SPED
12	M	Abbott, Billy C.	905483	0001341311	08/08/2011	0	New	End of school year	05/24/2012	<input checked="" type="checkbox"/>
Section Total:		1								

**Program Code Legend:** A - Structured or Sheltered English Immersion (SEI), B1 - Bilingual/Dual Language with Waiver 1, B2 - Bilingual/Dual Language with Waiver 2, B3 - Bilingual/Dual Language with Waiver 3, M - Mainstream

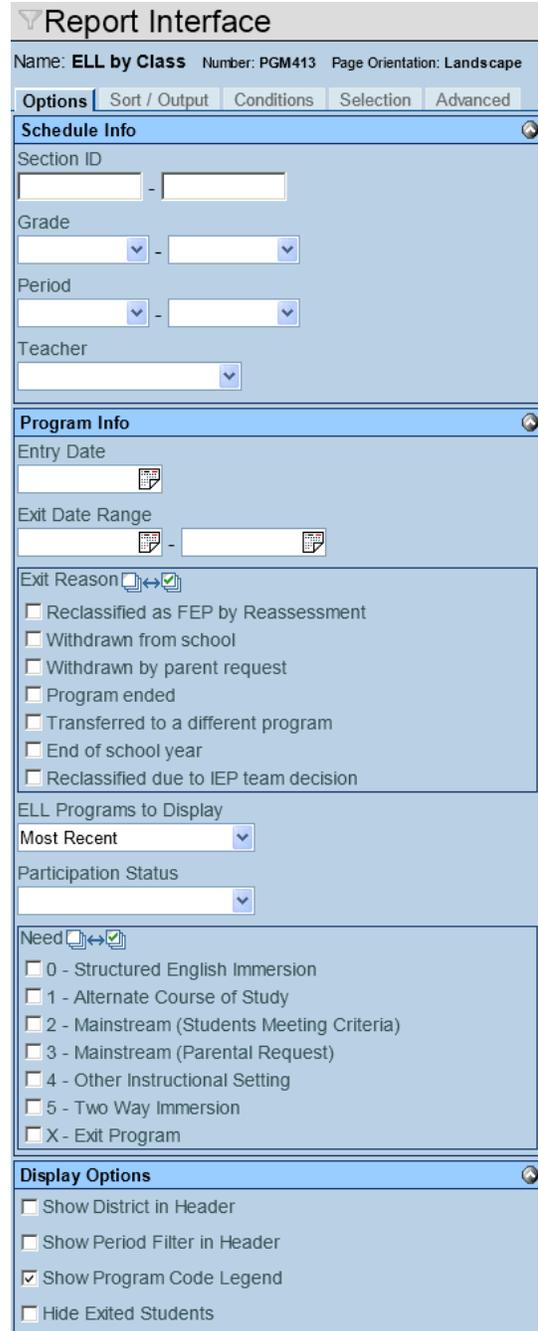
Printed by Admin User at 09/08/2011 10:29 PM Edupoint School District Page 2 of 11

Figure 11.60 - PGM413 – ELL by Class Report

Options for this report include:

- **Section ID** – enter a range of section ID to only print the report for certain sections
- **Grade** – select the grade range to display on the report.
- **Period** – select the range of class periods to display.
- **Teacher** – to print the report for a single teacher, select the name of the teacher from the drop-down list.
- **Entry Date** – enter a date to only print the report for students who entered on a specific date. The date should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.
- **Exit Date Range** – select a range of dates when students exited the program to customize the date range for the report. Enter the dates in the format M/D/YY or select by clicking the Calendar  button.
- **ELL Programs to Display** – select **Most Recent** to only show to latest ELL program entry, or select **All ELL Programs**.
- **Participation Status** – select **New** to display students who are in the ELL program for the 1<sup>st</sup> time, or **Continuing** to display returning students.
- **Need** – check off which needs to display. To check or uncheck all codes, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes.

- **Show District in Header** – check this box to display the name of the district at the top of the report.
- **Show Period Filter in Header** – check this box to list the periods included
- **Show Program Code Legend** – check this box to show a legend explaining the program codes
- **Hide Exited Students** – check here to not display students exited from the program



**Report Interface**

Name: **ELL by Class** Number: PGM413 Page Orientation: Landscape

Options | Sort / Output | Conditions | Selection | Advanced

**Schedule Info**

Section ID: [ ] - [ ]

Grade: [ ] - [ ]

Period: [ ] - [ ]

Teacher: [ ]

**Program Info**

Entry Date: [ ]

Exit Date Range: [ ] - [ ]

Exit Reason   

Reclassified as FEP by Reassessment

Withdrawn from school

Withdrawn by parent request

Program ended

Transferred to a different program

End of school year

Reclassified due to IEP team decision

ELL Programs to Display

Most Recent 

Participation Status

[ ] 

Need   

0 - Structured English Immersion

1 - Alternate Course of Study

2 - Mainstream (Students Meeting Criteria)

3 - Mainstream (Parental Request)

4 - Other Instructional Setting

5 - Two Way Immersion

X - Exit Program

**Display Options**

Show District in Header

Show Period Filter in Header

Show Program Code Legend

Hide Exited Students

Figure 11.61 - PGM413 – ELL by Class, Report Interface

## PGM414 – ELL Assessment by Class

The PGM413 report prints a separate page for each class section, and on each class page lists the students from that class who have taken the ELL assessment this school year.

Edupoint School District		Hope High School ELL Assessment by Class				Year: 2008-2009 Report: PGM414					
School Name: Hope High School		Section ID: 0258		Teacher Name: Gardner, David							
Grd	Gen	Student Name	SAIS ID	SIS Number	Test Date	Overall Score	Overall Pro Level	Result Code	Test Type	Test Score	Prof Level
12	M	Abbott, Billy C.	0001341311	905483	10/18/2008	38	Intermediate	5	Oral	43	P
									Reading	34	I
									Writing	25	B
Section Total: _____											1

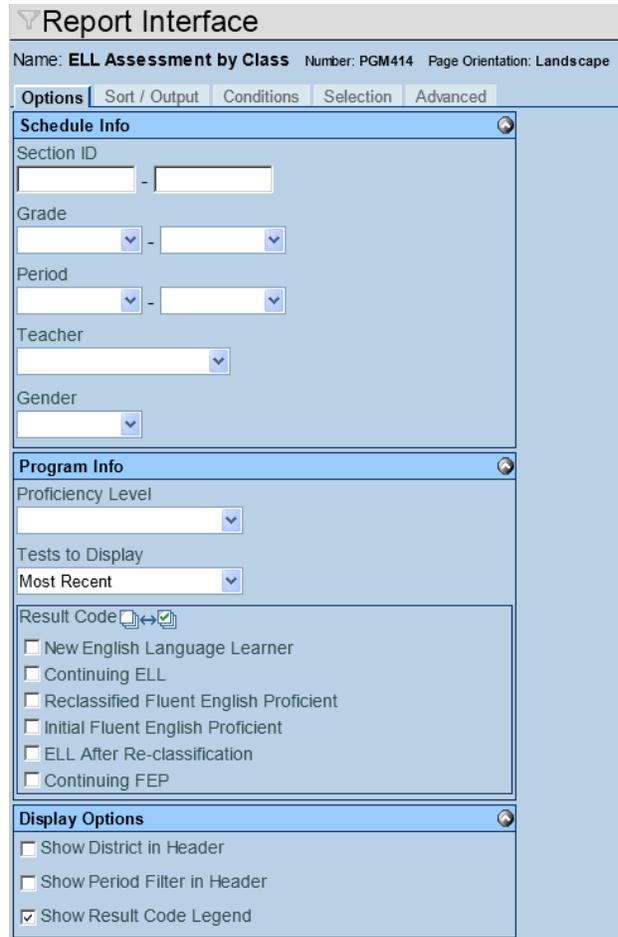
Result Code Legend:  
 1-New, 2-Continuing, 3-Reclassified FEP, 4-Initial FEP, 5-ELL after reclassification, 6-Continuing FEP, 7-ELL

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Figure 11.62 - PGM414 – ELL Assessment by Class Report

Options for this report include:

- **Section ID** – enter a range of section ID to only print the report for certain sections
- **Grade** – select the grade range to display on the report.
- **Period** – select the range of class periods to display.
- **Teacher** – to print the report for a single teacher, select the name of the teacher from the drop-down list.
- **Gender** – select Male or Female to filter the report by gender.
- **Proficiency Level** – select the overall proficiency level attained on the test to display.
- **Tests to Display** – select **Most Recent** to only show to latest ELL assessment, or select **All Tests**.
- **Result Code** – select the assessment result codes to be included in the report. To check or uncheck all codes, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes.



**Report Interface**

Name: **ELL Assessment by Class** Number: PGM414 Page Orientation: Landscape

Options | Sort / Output | Conditions | Selection | Advanced

**Schedule Info**

Section ID: [ ] - [ ]

Grade: [ ] - [ ]

Period: [ ] - [ ]

Teacher: [ ]

Gender: [ ]

**Program Info**

Proficiency Level: [ ]

Tests to Display: [ ]

Result Code 

New English Language Learner

Continuing ELL

Reclassified Fluent English Proficient

Initial Fluent English Proficient

ELL After Re-classification

Continuing FEP

**Display Options**

Show District in Header

Show Period Filter in Header

Show Result Code Legend

Figure 11.63 - PGM413 – ELL Assessment by Class, Report Interface

- **Show District in Header** – check this box to display the name of the district at the top of the report.
- **Show Period Filter in Header** – check this box to list the periods included
- **Show Result Code Legend** – check this box to show a legend explaining the result codes

## SAIS REPORTS

The SAIS Reports are very useful in troubleshooting errors that occurred during the SAIS submission process. The available reports are:

- SAIS-01 – Transaction Creation and Data Validation
- SAIS-02 – Transaction Status
- STU500.AZ – Student Transactions

To access the reports:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.

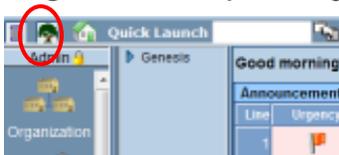


Figure 11.64 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 11.65 – Synergy SIS Folder

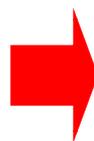


Figure 11.66 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **AZ** folder by clicking on the blue triangle pointing right, next to the word AZ. Once clicked, the triangle turns green and points downward.



Figure 11.67 – AZ Folder

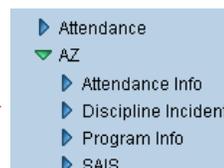


Figure 11.68 – AZ Folder Expanded

- Under the AZ folder, open the **SAIS** folder by clicking on the blue triangle pointing right, next to the word SAIS. Once clicked, the triangle turns green and points downward.

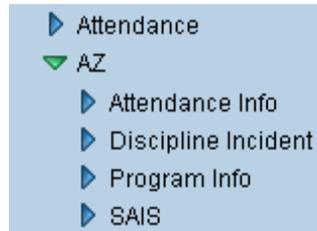


Figure 11.69 – SAIS Folder

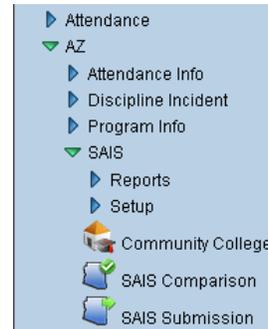


Figure 11.70 – SAIS Folder Expanded

- Under the SAIS folder, open the **Reports** folder by clicking on the blue triangle pointing right, next to the word Reports. Once clicked, the triangle turns green and points downward.



Figure 11.71 – Reports Folder

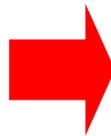


Figure 11.72 – Reports Folder Expanded

- Click on the **name of the report** to open the report and select the options to be used in printing the report.
- Once the report options have been set, click on the **Print** button to print the report. The report is printed as a PDF file to the screen, which can then be sent to the printer.



**Reference:** This chapter covers only the customizations specific to each of the reports used in State of Arizona Data Reporting, and the additional options available on the other tabs are explained in the manual titled *Synergy SIS – Query & Reporting Guide*.

## SAIS-01 – Transaction Creation and Data Validation

The SAIS-01 report normally appears after step one of the SAIS submission process. This report lists any errors or warning found in the data in Synergy SIS during the **Synergy SIS validation process**. The first page of the report displays a summary of the number of errors and warnings found at each school, and the number of students that were not include in the submission because of the errors. Subsequent pages show each error and warning in detail so they can be corrected.

SSD		Sample School District				Year: 2006-2007
		Transaction Creation and Data Validation				Report: SAIS-01
		Summary by School				Run#: 35
Total Students	Excluded Students	Errors	Warnings	Setup Errors	Setup Warnings	
<b>Garcia Elementary School</b> Elementary School						
2	1	1	0	0	0	
<b>Hamilton Elementary School</b> Elementary School						
2	0	0	0	0	0	
<b>Sullivan Elementary School</b> Elementary School						
4	0	0	0	0	0	
<b>William Elementary School</b> Elementary School						
3	0	0	0	0	0	
<b>11</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	
Start Time: 09/29/2005 17:16:26 End Time: 09/29/2005 17:17:35 Total Files: 1						

Figure 11.73 - SAIS-01 – Transaction Creation and Data Validation Report, Page 1

SSD		Sample School District		Year: 2006-2007
		Transaction Creation and Data Validation		Report: SAIS-01
		Validation Results		Run#: 1
		Legend: E - Error, W - Warning		
<b>Central High</b>		<b>High School</b>		
Name:	Carpenter, Glen C. Jr	Perm ID:	142204	DOB: 03/14/1989
E DataXml	The 'TuitionPayerCode' element has an invalid value according to its data type. An error occurred at , (1, 949). Record 'Enrollment', Field 'TuitionPayerCode'			
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 188). Record 'Enrollment', Field 'CTDS' is required			
Name:	Johnson, Katrina M.	Perm ID:	596197	DOB: 06/23/1961
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 188). Record 'PersonalInfo', Field 'CTDS' is required			
Name:	Jones, Harold	Perm ID:	161199	DOB: 04/16/1990
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 186). Record 'PersonalInfo', Field 'CTDS' is required			
Name:	Mendez, Adina C.	Perm ID:	212204	DOB: 03/16/1989
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 183). Record 'Enrollment', Field 'CTDS' is required			
E DataXml	The 'TuitionPayerCode' element has an invalid value according to its data type. An error occurred at , (1, 899). Record 'Enrollment', Field 'TuitionPayerCode'			
Name:	Peterson, Britney C.	Perm ID:	152	DOB: 09/04/1991
E ENR003	Responsible party information is missing. Either change the Guardian Filter in SAIS School Setup, or check the appropriate field in the parental information tab for this student. (Record 'PersonalInfo', Field 'MotherLastName', Value *)			
Name:	Rodriguez, Alexander C.	Perm ID:	252199	DOB: 11/20/1990
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 197). Record 'PersonalInfo', Field 'CTDS' is required			
Name:	Williams, Natalie	Perm ID:	198252	DOB: 02/07/1990
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 189). Record 'PersonalInfo', Field 'CTDS' is required			
Name:	Williams, Jenna M.	Perm ID:	198204	DOB: 07/14/1988
E DataXml	The 'CTDS' element has an invalid value according to its data type. An error occurred at , (1, 189). Record 'PersonalInfo', Field 'CTDS' is required			

Figure 11.74 - SAIS-01 – Transaction Creation and Data Validation Report, Detail Page

This report does not have any customization options.

**Report Interface**

Name: **Transaction Creation and Data Validation** Number: **SAIS-01** Page Orientation: **Portrait**

**Sort / Output** | Conditions | Selection | Advanced

**Output** | **Label Options**

File Type: Do not open result in the browser, prompt for download  
PDF

Display "Confidential"

TransactionRun Mandatory Sort Properties:  
None

**TransactionRun**

Line	Sort By	Sort Order
1	Run # (TransactionRun)	Ascending

**Mail Merge Options**

Merge Document  Merge Output Type  Merge Language Property

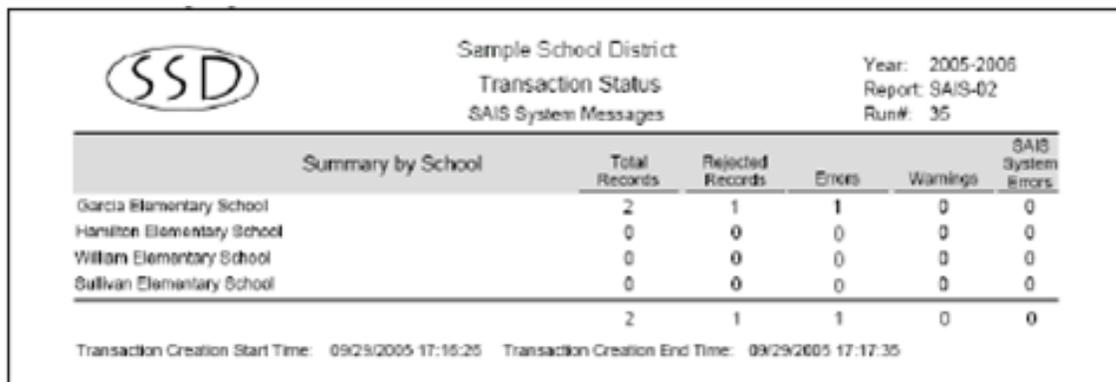
The Merge Language Property is used to determine which version of the document (defined in Mail Merge setup) will be created. If there is no corresponding document for the given language (or this field is left blank) the default letter is used.

Figure 11.75 - SAIS-01 – Transaction Creation and Data Validation, Report Interface

## SAIS-02 – Transaction Status

The SAIS-02 report normally appears after step three of the SAIS submission process. This report lists any errors or warning found in the data in Synergy SIS during the **state of Arizona validation process**. The first page of the report displays a summary of the number of errors and warnings found at each school, and the number of students that were not include in the submission because of the errors. Subsequent pages show each error and warning in detail so they can be corrected.

The difference between this report and the SAIS-01 report is that the 01 report shows errors after the Synergy SIS validation process where the 02 reports shows the errors after the state of Arizona validation process. Synergy SIS can only validate the data itself, where the state of Arizona’s process compares the data against other schools’ information and the data already uploaded to the SAIS system. Both sets of errors need to be corrected.

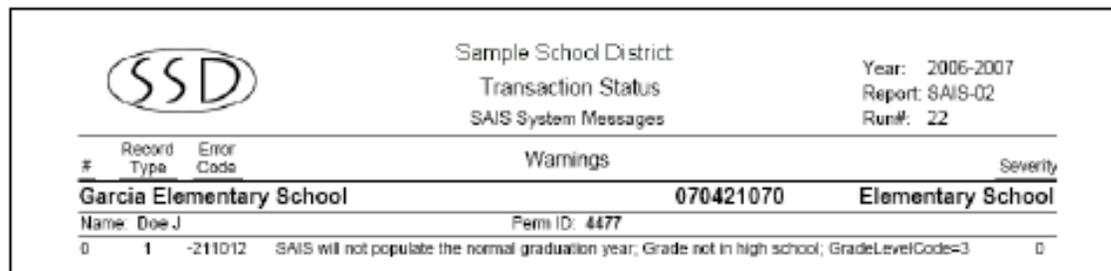


SSD Sample School District Year: 2005-2006  
 Transaction Status Report: SAIS-02  
 SAIS System Messages Run#: 35

Summary by School	Total Records	Rejected Records	Errors	Warnings	SAIS System Errors
Garcia Elementary School	2	1	1	0	0
Hamilton Elementary School	0	0	0	0	0
William Elementary School	0	0	0	0	0
Sullivan Elementary School	0	0	0	0	0
	2	1	1	0	0

Transaction Creation Start Time: 09/25/2005 17:15:25 Transaction Creation End Time: 09/29/2005 17:17:35

Figure 11.76 - SAIS-02 – Transaction Status Report, Summary Page



SSD Sample School District Year: 2006-2007  
 Transaction Status Report: SAIS-02  
 SAIS System Messages Run#: 22

#	Record Type	Error Code	Warnings	Severity
0	1	-211012	SAIS will not populate the normal graduation year; Grade not in high school; GradeLevelCode=3	0

Garcia Elementary School 070421070 Elementary School  
 Name: Doe J Ferns ID: 4477

Figure 11.77 - SAIS-02 – Transaction Status Report, Detail Page

While the report normally displays following step three, it can also be run afterwards using the report interface to customize it. The customization options allow the report to be divided into different types of transactions, to make it easier to redistribute the errors to the appropriate work area for resolution. For example, a report could be run with all of the special education errors so that the special education team can resolve them.

**Report Interface**

Name: **Transaction Status** Number: **SAIS-02** Page Orientation: **Portrait**

Options | Sort / Output | Conditions | Selection | Advanced

Transaction Run Number

**Filters**

Error Codes

For multiple error codes enter as a comma delimited list

Transaction Numbers

<input type="checkbox"/> 1 - Enrollment	<input type="checkbox"/> 2 - Readmission	<input type="checkbox"/> 3 - Withdrawal
<input type="checkbox"/> 4 - Absence	<input type="checkbox"/> 5 - Personal Info	<input type="checkbox"/> 6 - Membership Change
<input type="checkbox"/> 7 - District of Residence	<input type="checkbox"/> 8 - FTE and Share	<input type="checkbox"/> 9 - Grade Transfer
<input type="checkbox"/> 10 - Payer Factor	<input type="checkbox"/> 11 - Need	<input type="checkbox"/> 12 - Assessment
<input type="checkbox"/> 13 - English Prog	<input type="checkbox"/> 14 - Service	<input type="checkbox"/> 15 - Support Program
<input type="checkbox"/> 16 - Status	<input type="checkbox"/> 17 - Attendance	<input type="checkbox"/> 18 - Summer Withdrawal
<input type="checkbox"/> 19 - SPED Service DOR Transfer	<input type="checkbox"/> 20 - Community College Classes	<input type="checkbox"/> 21 - Initial IEP
<input type="checkbox"/> 22 - Test Label	<input type="checkbox"/> 23 - Childhood Program	<input type="checkbox"/> 24 - Childhood Program Assessment

Filters are treated as an OR condition

Figure 11.78 - SAIS-02 – Transaction Status, ReportInterface

To customize the report:

1. Select the **Transaction Run Number** from the drop-down list. The transaction run number is the sequentially serial number automatically assigned to a submission by Synergy SIS. To see more detail about each run number, go to the History tab of the SAIS Submission screen.
2. To filter the report for specific types of errors, enter the error code(s) in the **Error Codes** box. Multiple error codes may be entered if each code is separated by a comma. For example, error code 9019 means that no school membership was found for the student. For a complete list of error codes, see the SAIS document Transaction System Messages.
3. To select which transactions should be included in the report, check the box in front of the **Transaction Number**. To check or uncheck all codes, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes.
4. The error codes selected and the transaction numbers selected are treated as an **OR condition**, which means if the transaction meets any of the criteria entered (it has the any of the error codes or any of the transaction numbers), it will display on the report.

## STU500.AZ – Student Transactions

The STU500.AZ report prints a list of all the transactions sent to the state for a particular student. This is very helpful in diagnosing the cause of error messages. The report lists the date, run number and name of the transaction as well as the type of transaction (Add, Change, Delete) and the result of the upload (Successful or Failed).

Student Name	Grade	Perm ID	State Number	Date	Seq Num	Run Num	ID	Transaction Name	Type	Result
Sparks, Edith	09	997013		05/29/2009	1	10	1	Enrollment	Add	Waiting For Result

**Error ID**    **Severity**    **Description**  
 1,"997013|0|1|123456273|Sparks    E","A","123456273","997013",0,2009/09/08#,1,(M),"Edith","Sparks","Sparks",  
 {F},{M},#1998/04/16#,(US),(AZ),2013,"193456000",{01},"Joe","Sparks",{E6},{1.00},...{1},{S},.....1

Figure 11.79 - STU500.AZ – Student Transactions Report

The report can be customized using the following options:

**Report Interface**  
 Name: **Student Transactions**    Number: **STU500.AZ**    Page Orientation: **Portrait**

Options | Sort / Output | Conditions | Selection | Advanced

**Student Filter Options**

Perm ID    State Student Number  
   

Last Name    First Name  
   

Grade  ↔

09     10     11     12

Instructional Setting  ↔

Adult Transition     County Students     Independent Study  
 Learning Center     Other Alternative Program     Out of County  
 Special Ed

**Transaction Filter Options**

Operation Type

Transaction Numbers  ↔

Enrollment     Readmission     Withdrawal     Absence  
 Personal Info     Membership Change     District of Residence     FTE and Share  
 Grade Transfer     Payer Factor     Need     Assessment  
 English Prog     Service     Support Program     Status  
 Attendance     Summer Withdrawal     SPED Service DOR Transfer     Community College Classes  
 Initial IEP     Test Label     Childhood Program     Childhood Program Assessment

**Report Options**

Sort By

Show Transaction Row Details  
 Include Cancelled Transaction

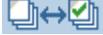
Transaction Date  
 -

Run Number

Figure 11.80 - STU500.AZ – Student Transactions, Report Interface

- **Student Filter Options** – students can be selected by **Perm ID**, **State Student Number** (SAIS ID), **Last Name**, **First Name** or **Grade**. The students may also be selected using their **Instructional Setting** as defined in their enrollment record. The Instructional Settings is customized by each district, so the values in the picture

above differ from district to district. To check or uncheck all grades or instructional settings, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes. The report works best if only one student's records are displayed, so adjust the criteria accordingly.

- **Transaction Filter Options** – the transactions displayed for each student may be filtered by the **Operation Type** (Add, Change, Delete) and the **Transaction Number**. **At least one transaction number must be selected.** This filter option works as an OR condition – the transaction can be any of the numbers selected. To check or uncheck all transaction numbers, use the  boxes. The blank box un-checks all boxes, and the checked box checks all boxes.
- **Sort By** - Select the order by which the transactions will be sorted from the **Sort By** drop-down list. Transactions may be sorted by **Date**, **Operation Type (A, C, D)** or **Transaction Number**.
- **Show Transaction Row Details** – check this box to display the details of each transaction (highly recommended!)
- **Include Cancelled Transaction** – check this box to show transactions that were included in cancelled submissions.
- **Transaction Date** – enter the date range of the transactions to display. The dates should be entered in the format M/D/YY or may be selected by clicking the Calendar  button.
- **Run Number** – to show only transactions from one submission, enter the Run Number of the submission here.

**Note:** When the Report Interface is first displayed, the **Transaction Filter Options** and **Report Options** are minimized.



Figure 11.81 – Expanding Filter Options

To expand these sections to further customize the report, click on the  button in each section.

## STUDENT PROGRAMS REPORTS

The Student Programs reports provide two reports regarding the student program. The majority of available reports regarding student programs are located in the Program Info folder in the AZ folder. The two reports available are:

- PGM801 – Tetra Data Extract
- ELL201 – ELL Section List
- ELL402 – In District Total Semesters

To access the reports:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button.



Figure 11.82 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.

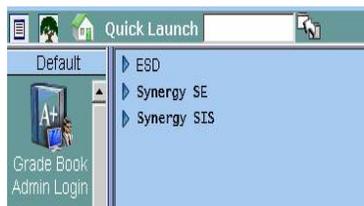


Figure 11.83 – Synergy SIS Folder



Figure 11.84 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **Student Programs** folder by clicking on the blue triangle pointing right, next to the words Student Programs. Once clicked, the triangle turns green and points downward.

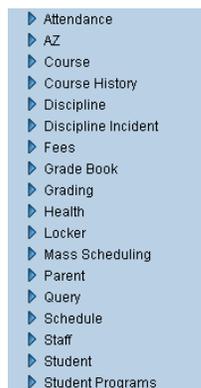


Figure 11.85 – Student Programs Folder



Figure 11.86 – Student Programs Folder Expanded

- Under the Student Programs folder, open the **Reports** folder by clicking on the blue triangle pointing right, next to the word Reports. Once clicked, the triangle turns green and points downward.



Figure 11.87 – Reports Folder



Figure 11.88 – Reports Folder Expanded

- To access the extracts, click on the blue triangle next to the word **Extracts**. To access the List reports, click on the blue triangle next to the word **List**.

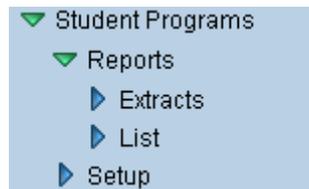


Figure 11.89 – Reports Folder

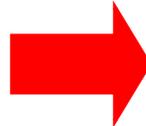


Figure 11.90 – Reports Folder Expanded

- Click on the **name of the report** to open the report and select the options to be used in printing the report.
- Once the report options have been set, click on the **Print** button to print the report. The report is printed as a PDF file to the screen, which can then be sent to the printer.



**Reference:** This chapter covers only the customizations specific to each of the reports used in the State of Arizona Data Reporting, and the additional options available on the other tabs are explained in the manual titled *Synergy SIS – Query & Reporting Guide*.

## PGM801 – Tetra Data Extract

The PGM801 extract exports data from Synergy SIS to a text file for use in the TetraData system. When the extract is complete, the Job Result screen appears with a list of all the data files extracted.

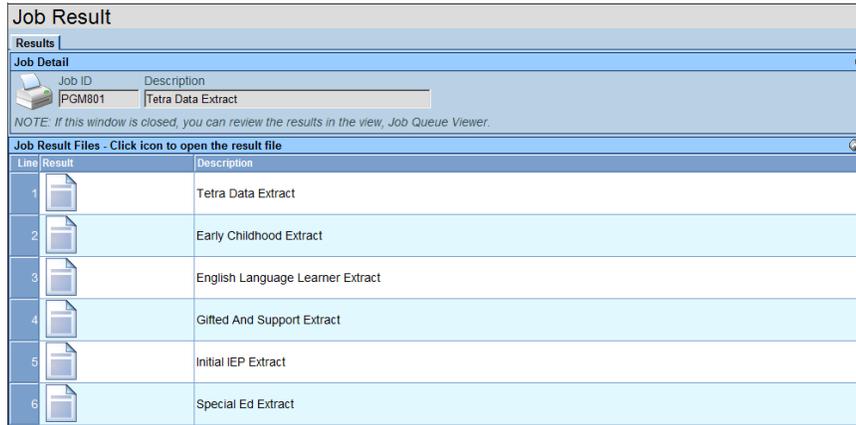


Figure 11.91 – Job Result Screen

The **Tetra Data Extract** is a summary sheet that displays the number of records exported in each category. Each of the other extract files listed (Early Childhood, English Language Learner, etc.) is a text file that can be imported to the TetraData software. Click on each extract listed in the Job Result screen to open the file and save it to the desired location.

The screenshot shows a report titled "Tetra Data Extract". At the top, it displays the date "08/30/2009", time "5:14 AM PST", and page information "Page: 1 of 1" and "Report: PGM801". The report content is organized into sections for different data categories, each with a sub-section for "Hope High School" and "Begin school processing", followed by a count of 273 records.

Date	Time	Page	Report
08/30/2009	5:14 AM PST	1 of 1	PGM801
<b>Early Childhood</b>			
Hope High School	273		
Begin school processing			
<b>Initial IEP</b>			
Hope High School	273		
Begin school processing			
<b>ELL</b>			
Hope High School	273		
Begin school processing			
<b>SPED</b>			
Hope High School	273		
Begin school processing			
<b>Gifted And Support</b>			
Hope High School	273		
Begin school processing			

Figure 11.92 - PGM801 Tetra Data Extract Summary Sheet Report

This report does not have any customization options.

**Report Interface**

Name: **Tetra Data Extract** Number: **PGM801** Page Orientation: **Portrait**

**Sort / Output** Conditions Selection Advanced

**Output** **Label Options**

File Type Do not open result in the browser, prompt for download  
PDF  Display "Confidential"

TetraDataExtractErrorsFB Mandatory Sort Properties:  
None

**TetraDataExtractErrorsFB** Add

Line	Sort By	Sort Order
------	---------	------------

**Mail Merge Options**

Merge Document Merge Output Type Merge Language Property

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

Figure 11.93 - PGM801 – Tetra Data Extract Report Interface

## ELL201 – ELL Section List

The ELL201 reports prints a list of all active class sections at a school. If a student in the section has taken an ELL assessment, the assessment data displays for that student.

Edupoint School District		Hope High School ELL Section List								Year: 2008-2009 Report: ELL201							
Class ID: 0077		Staff Jackson, Kathy				Room 216				Assess Primary Lang		DES Current		DES Enter			
Student Name	Sis Num	State SN	Grd	Gen	Eth Code	Birth Date	Enter Date	Home Language	Phone	Date	Oral	Read	Write	Date	Code	Date	Date
Abbott, Billy C.	905483	0001341311	12	M	Hispanic or Latn	05/13/1965	09/02/2008	Spanish	480-555-1214								
Test Name Admin Date Oral Reading Writing Overall ELL 10/18/2008 Prof Inter Bas Inter																	
Barker, Juan B.	967065	0001270916	12	M	White (Not Hisp)	08/29/1968	09/02/2008	English	480-555-4218								
No Assessment Data																	
Beckstead, Phyll	871738	0001289967	12	F	White (Not Hisp)	06/11/1968	09/02/2008	English	480-555-2890								
No Assessment Data																	
Branch, Clarence	831203	0001200689	12	M	White (Not Hisp)	08/01/1967	09/02/2008	English	480-555-2634								
No Assessment Data																	
Cody, Harry D.	872242	0001290929	12	M	American Indian	05/04/1968	09/02/2008	English	480-555-5461								
No Assessment Data																	
Cooley, Carolyn	922759	0001348466	12	F	White (Not Hisp)	04/15/1968	09/02/2008	English	480-555-5461								
No Assessment Data																	
Dixon, Eugene B.	922236	0001263031	12	M	White (Not Hisp)	12/31/1967	09/02/2008	English	480-555-1830								
No Assessment Data																	
Forsythe, Ralph	968250	0001354607	12	M	White (Not Hisp)	09/09/1967	09/02/2008	English	480-555-4962								
No Assessment Data																	
Gunnell, Diana L.	874772	0001209981	11	F	White (Not Hisp)	07/15/1968	09/02/2008	English	480-555-8633								
No Assessment Data																	
Harvey, Mildred J.	839901	0001201457	12	F	White (Not Hisp)	08/12/1967	09/02/2008	English	480-555-7835								
No Assessment Data																	
Hedges, Jose D.	874258	0001212356	12	M	White (Not Hisp)	03/05/1968	09/02/2008	English	480-555-9464								
No Assessment Data																	
Kleinsorge, Dorol	872411	0001205967	12	F	White (Not Hisp)	09/11/1967	09/02/2008	English	480-555-6654								
No Assessment Data																	
Knudsen, Alan D.	878209	0001215186	12	M	White (Not Hisp)	11/27/1967	09/02/2008	English	480-555-8630								
No Assessment Data																	
Loncar, Jessica	987511	0001272686	11	F	White (Not Hisp)	09/19/1968	09/02/2008	English	480-555-3634								
No Assessment Data																	
Martin, Kimberly	872069	0001205189	12	F	White (Not Hisp)	07/13/1968	09/02/2008	English	480-555-6964								
No Assessment Data																	
Miller, Deborah	874245	0001208706	12	F	White (Not Hisp)	04/08/1968	09/02/2008	English	480-555-3634								
No Assessment Data																	

Figure 11.94 - ELL201 – ELL Section List Report

The report can be customized using the following options:

The screenshot shows the 'Report Interface' for 'ELL Section List' (Number: ELL201, Page Orientation: Portrait). The interface is divided into several sections:

- Options:** Includes tabs for 'Options', 'Sort / Output', 'Conditions', 'Selection', and 'Advanced'.
- Report Options:**
  - Section ID:** Two input fields for a range.
  - Limit tests to only the most recent
  - Hide Totals
  - Teacher:** A dropdown menu.
  - Student Grade:** Radio buttons for 09, 10, 11, and 12.
  - Assessment Test Options:**
    - Display Performance Level
    - Display Raw Score
- Fields to Include:** A list of checkboxes for various fields:
  - Grade
  - Gender
  - Enter Date
  - Birth Date
  - Ethnic Code
  - State ID
  - Phone Number
  - SIS Number
  - Home Language
  - Include Assessment of Primary Language
  - Include DES
  - Include IDEA

Figure 11.95 - ELL201 – ELL Section List, Report Interface

- **Filter Options** – the reports can be filtered so that only a range of sections is printed by entering a beginning and ending **Section ID**. It can also be limited to sections taught by a specific teacher by selecting the **Teacher** from the drop-down list. Finally, the report can be restricted so only students at the grade levels checked off in the **Student Grade** section are displayed.
- **Test Display Options** – to show only the latest ELL assessment, check the box labeled **Limit tests to only the most recent**. The test results may **Display Performance Level** and /or **Display Raw Score** by checking the appropriate boxes.
- **Overall Display Options** – At the end of each section, the total number of students is displayed, as well as the total number of each gender. To hide these totals check the box labeled **Hide Totals**. To select which information is displayed for each student, regardless of their ELL assessment status, click on the **Fields to Include**.

## ELL402 – In District Total Semesters

The ELL402 report lists the students that should be participating in ELL based on their ELL assessment results, and shows the number of semesters enrolled versus the number of semesters they participated in ELL.

Edupoint School District		Hope High School In District Total Semesters			Year: 2010-2011 Report: ELL402		
Student Name	Perm ID	Gender	Semesters Expected	Semesters in ELL	Missing Semesters		
					Date	School Year	Semester
Abbott, Billy C.	905483	M	11	0	12/19/2008	2008-2009	Semester 1
					05/29/2009	2008-2009	Semester 2
					12/22/2009	2009-2010	Semester 1
					05/26/2010	2009-2010	Semester 2
					12/23/2010	2010-2011	Semester 1
					07/29/2011	2010-2011	Semester 2
Acevedo, Andrew	886630	M	10	1	12/19/2008	2008-2009	Semester 1
					05/29/2009	2008-2009	Semester 2
					12/22/2009	2009-2010	Semester 1
					05/26/2010	2009-2010	Semester 2
					07/29/2011	2010-2011	Semester 2

Printed by Admin User at 09/08/2011 11:00 PM      Edupoint School District      Page 1 of 1

Figure 11.96 – ELL402 – In District Total Semesters Report

The report can be customized using the following options:

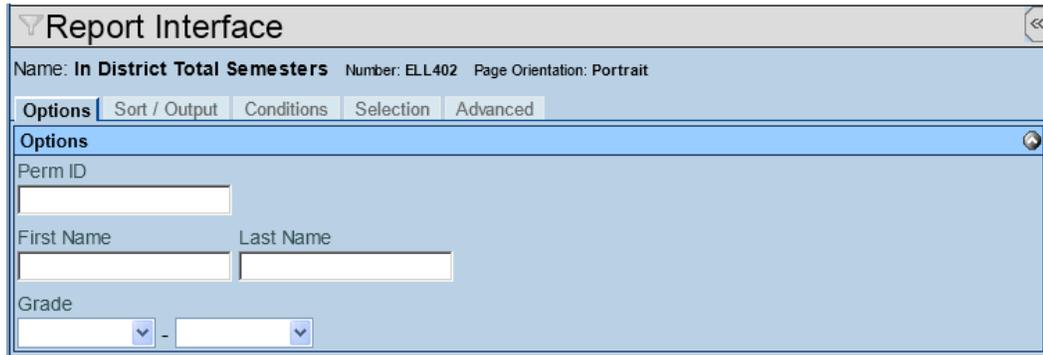


Figure 11.97 – ELL402 – In District Total Semesters Report Interface

An individual student or group of students can be selected by filtering on the **Perm ID**, **Last Name**, **First Name**, or **Grade**. For example, if grade 12 is selected the report prints an individual report for each student in grade 12. A range of grades may also be selected.

Before this report can be run, the Update Semester Totals process must be run for the district. To configure and run the Update Semester Totals, please see the section in Chapter Four of the *Synergy SIS – State of Arizona Data Reporting Administrator Guide*.

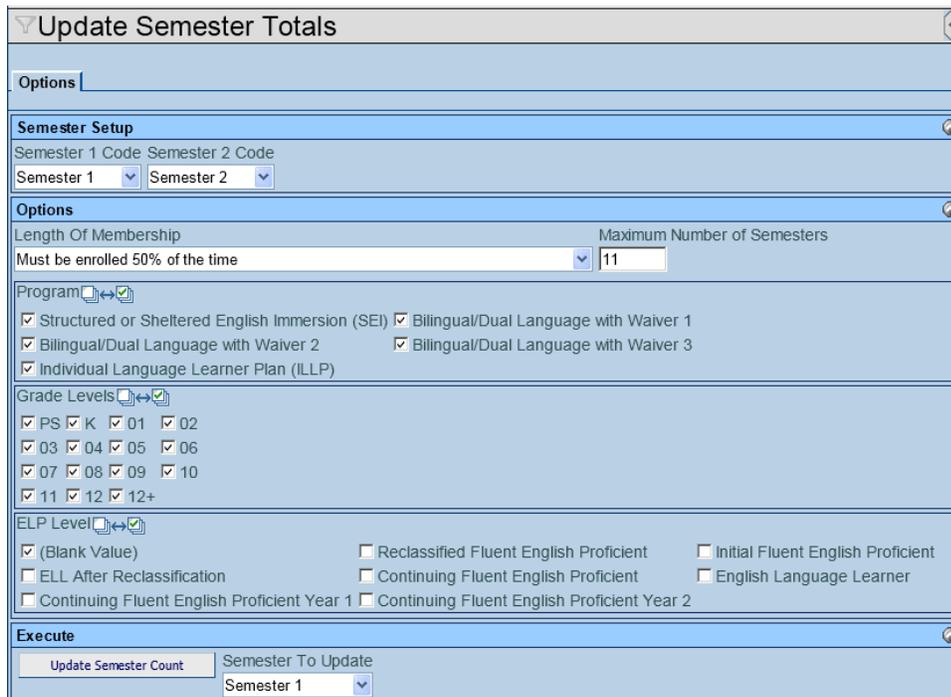


Figure 11.98 – Update Semester Totals Screen

## QUERIES

Queries that may be helpful in managing SAIS requirements are:

### Students Missing SAIS ID

```
K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1 COLS R0.StateStudentNumber  
(0.5in,'SAIS ID',Hide), R0.SisNumber (0.75in), R0.FormattedName, R0.BirthDate, R0.Gender,  
R1.Grade (0.5in), R1.EnterDate, R1.EnterCode (0.75in) If R0.StateStudentNumber = Sort  
R0.FormattedName
```

### List of Native American Students

```
K12.Student R0, Revelation.RevPersonSecondaryEthnic R1 (PersonGU,R0.StudentGU,Outer)  
COLS R0.FirstName, R0.LastName, R0.StudentGU (,,Hide), R0.HispanicIndicator, R1.EthnicCode  
If R1.EthnicCode Start ('I')
```

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