Synergy Special Education

Synergy SE©
National Administrator Guide

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This edition applies to Synergy SE™ software and all subsequent releases and modifications until indicated with new editions or revisions.

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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 district computer hardware and software meet the minimum requirements for Synergy. If there are any questions about the system requirements, please refer to our Requirements document.

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 SE. 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.

Chapter One: OVERVIEW

In this chapter, the following topics are covered:

- ► Overview of Synergy SE National System Administration
- ► Implementation Considerations
- ► Configuration Preparation

OVERVIEW OF SYNERGY SE NATIONAL SYSTEM ADMINISTRATION

Synergy SE system administration primarily consists of the initial configuration and maintenance of the various special education modules through Synergy SE. The modules covered in this guide include:

- **District and School Setup**

  Information pertaining to the school district's special education department, such as address and contact information is maintained here. Districts can manage IEP and Progress Report options, Timeline Report options, and other Synergy SE document options. An option is available for districts to maintain default special education teams for each school.

- **Users and Security**

  Special Ed User Group Security can be set so that user groups and individual users have appropriate access to screens, documents and fields within documents. Access can be set to update, print or view only. Access to Manual Process moves and Student Document Unlock can be configured.

- **Synergy SE Processes**

  Synergy SE contains five special education processes in which special education students reside. Each process contains documents specific to that process. Through this module, districts can modify the processes, and the documents within the processes, to fit their unique needs.

- **Document Configuration**

  Synergy SE is a document driven application. The documents that are contained in Synergy SE have been created to ensure that districts meet state and federal guidelines. Districts have the ability to configure existing documents to meet their specific requirements. In addition, the Document Definition module allows districts to create their own unique documents to streamline work efficiency and meet their department's specifications. Translation into the student's home language is available, also.

- **Annual Goals Configuration**

  Synergy SE's Goal Library contains over 2000 individual annual goals that are aligned with state standards. The goals are organized into areas that focus on students specific needs. Using the Goal and Area of Need modules, districts can edit existing goals or add new goals to the Goal Library. The ability to add standard goals is available.

- **Special Ed Tests**

  Synergy SE contains various assessment templates that are used in the student's evaluation process. Existing assessments can be edited or removed and new assessments can be added to the Standardized Test or Special Ed Test modules.

Reference: For more information on the other modules not covered in this Guide, please refer to ***Synergy SIS System Administrator Guide.***

IMPLEMENTATION CONSIDERATIONS

Who does what?

A critical piece of the process is determining who will be responsible for each setup or data entry process in Synergy SE. This will determine the structure and security of the user groups. For example, what role will the IT staff play in both the initial implementation and the ongoing maintenance? Or is there a dedicated student records system administrator? What modules do the special education clerks setup and maintain? Who will enter the document information? Who can change student address and phone information?

CONFIGURATION PREPARATION

Before sitting down and setting up the Synergy SIS system, gather the following information:

- The district address, phone, fax, logo, and state code information
- A list of schools with their address, phone, fax, logo, and state code information, as well as the names of the principals.
- A list of staff with all of the schools in which they work and their role in the schools. If desired, the staff address & phone information, emergency contact information, and credentials may also be recorded.
- A list of the staff that will be using Synergy SIS, and their duties within Synergy SIS.
- If LDAP will be used, the domain name and server UNC path for the LDAP server will be needed.
- If Synergy SIS will be used to send e-mail notifications, the address of the mail server to be used as well as the email address to use as the “From” address.

Chapter Two: District and School Setup

In this chapter, the following topics are covered:

- Organization
- Setup
- Special Ed School Team
- Photo Attach

ORGANIZATION

The Special Education tab of the Organization screen contains individual district identifying information.

NAVIGATE TO THE ORGANIZATION SCREEN >SPECIAL EDUCATION TAB:

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

Figure 2-1 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Click on the name **Setup** or pointing right next to it. The triangle will turn green and point downward.

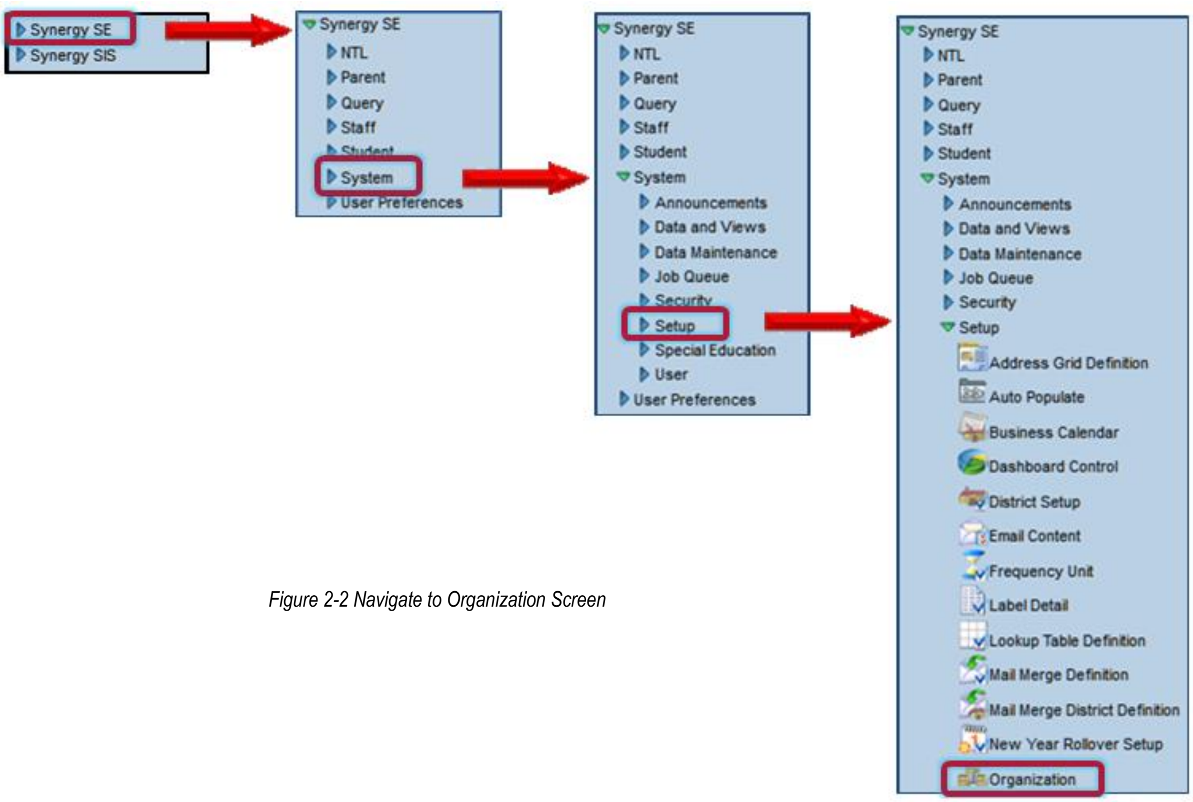


Figure 2-2 Navigate to Organization Screen

5. Click on the name **Organization.** The Organization screen displays.

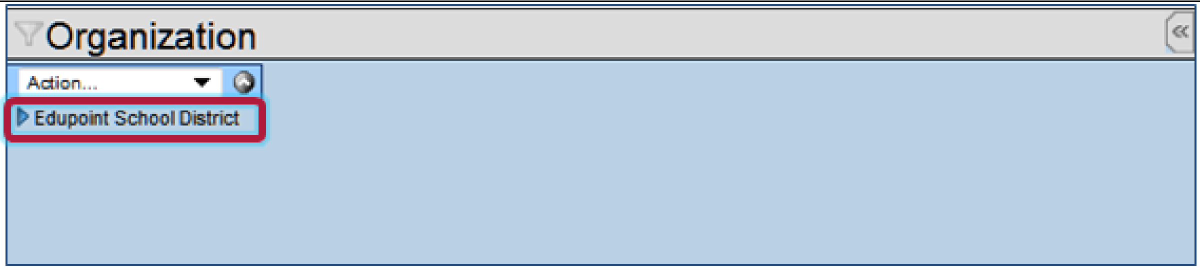


Figure 2-3 Organization Screen Organization Name

6. Click on the **name of your organization** or **distric**t. A detailed screen displays on the right.

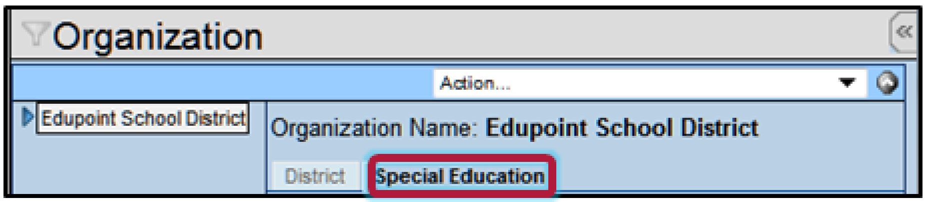


Figure 2-4 Organization Screen Special Education Tab

7. Click on the **Special Education** tab.

District Information Section

Information added to the District Information sections will appear on the header of all printable documents.

1. Enter **Department Name, Address, Department Phone** and **Fax** number.

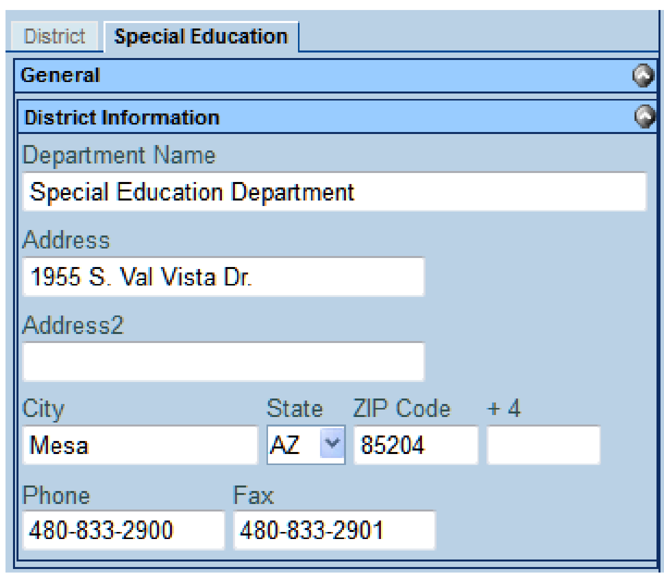


Figure 2-5 Organization Screen Special Educatrion Tab District Information

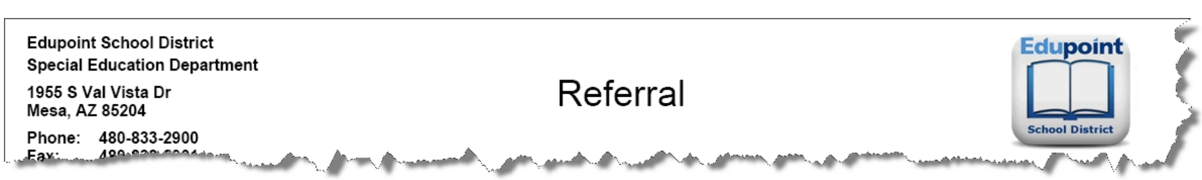


Figure 2-6 Document Header Example

SETUP

The Setup screen lists the options available for modifying individual documents at the District level. Settings selected here will apply to all documents of the designated type, for all Users.

NAVIGATE TO THE SETUP SCREEN

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

Figure 2-7 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name NTL or pointing right next to it. The triangle will turn green and point downward.
4. Under the NTL folder, click on the name **Setup**. The Setup screen opens.

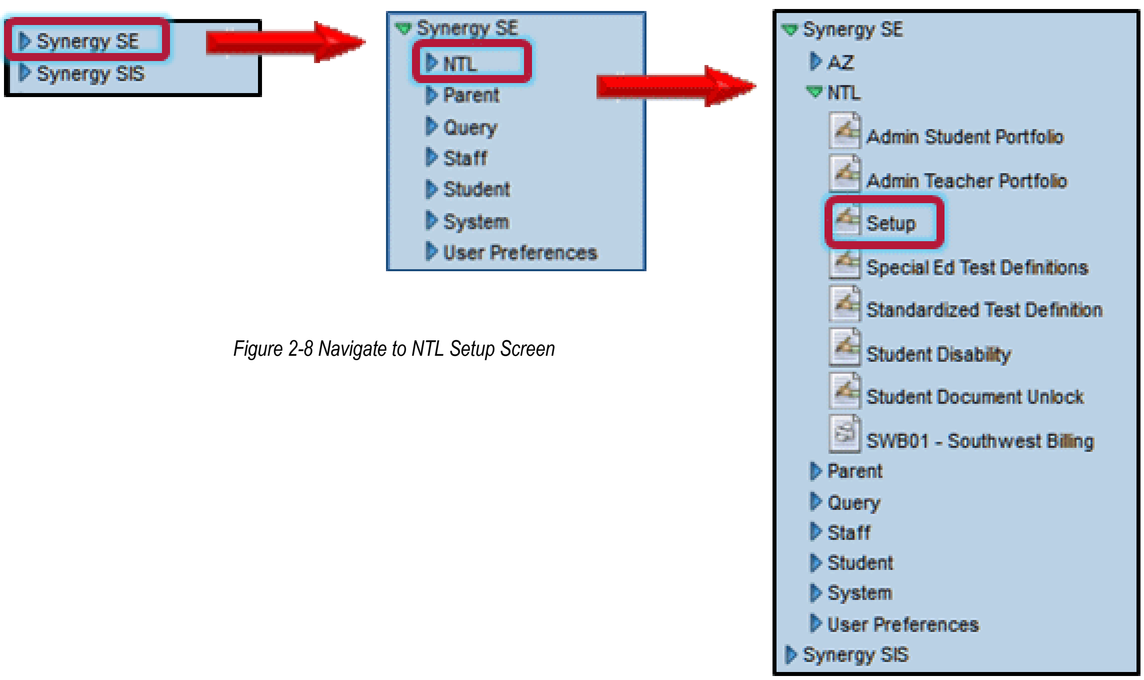


Figure 2-8 Navigate to NTL Setup Screen

IEP and Progress Report Options Tab

This tab lists the options available within the IEP and the Progress Report that is subsequently generated when an IEP is finalized.

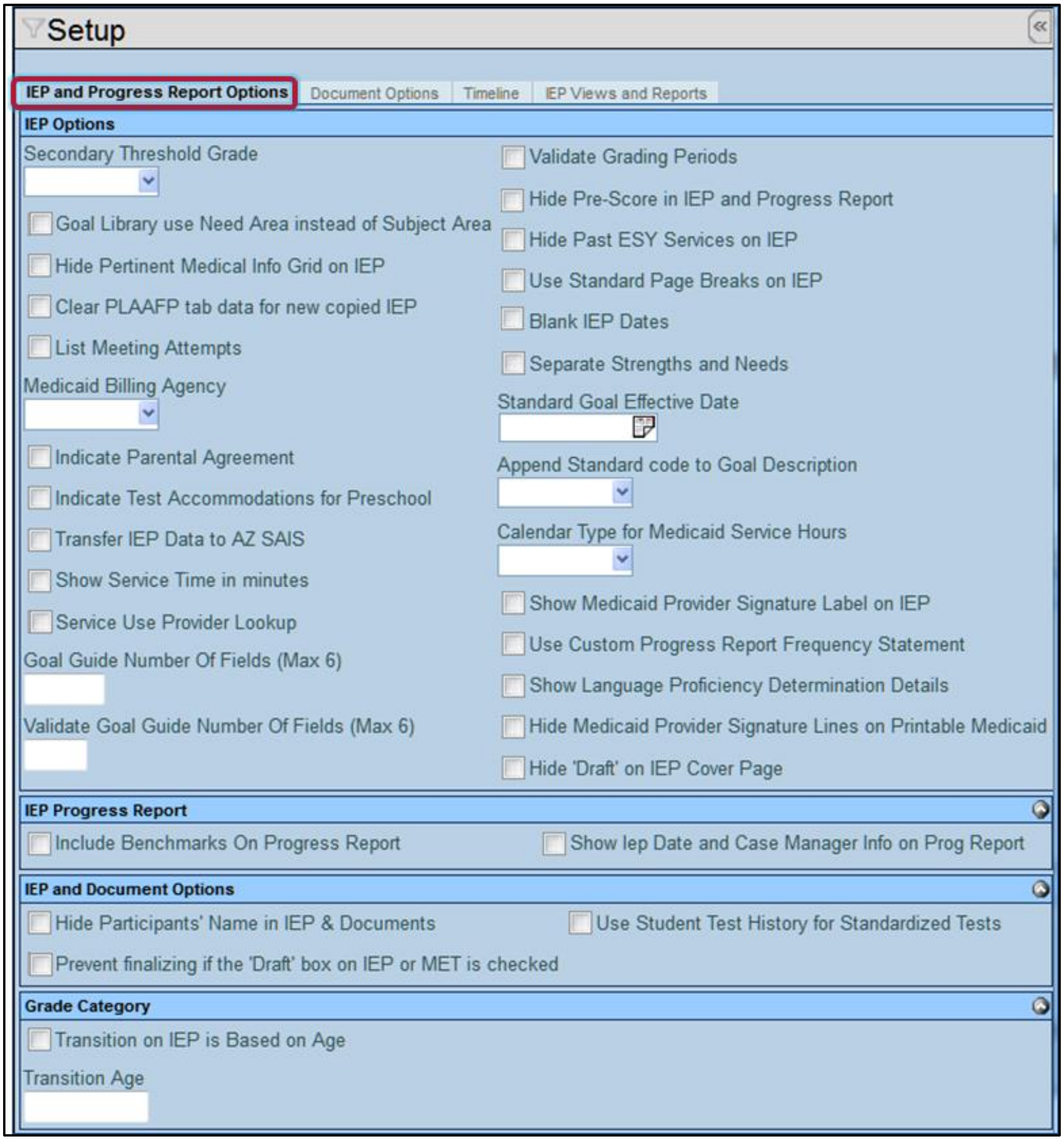


Figure 2-9 IEP and tProgress Report Tab

Note: Options will display based upon applicability to your locale. Not all of the functions described below for any one tab may be available.

IEP OPTIONS

- **Secondary Threshold Grade**

  Selecting the grade from the drop determines the lowest grade that displays the Individual Transition Plan grid in IEP.

- **Goal Library use Need Area Instead of Subject Area**

  For Districts using the default Goal Library, this box should always be selected.

- **Hide Pertinent Medical Grid on IEP**

  If checked, the Pertinent Medical Information Grid in the Medical Tab of the IEP will be removed from view. The grid will continue to exist in the Parent Input document as well as in a narrative in the MET Report.

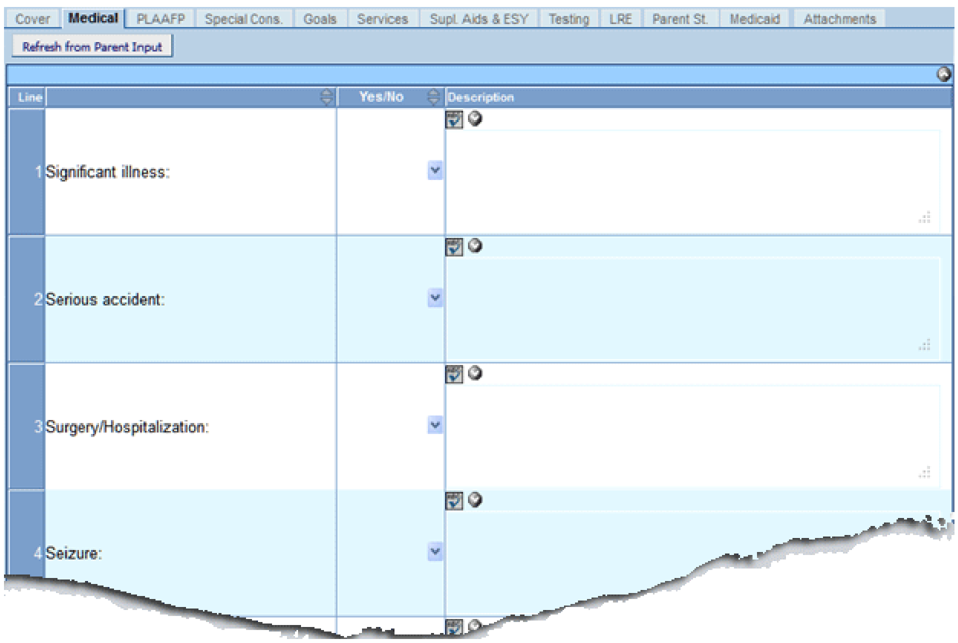


Figure 2-10 IEP Medical Grid

- **Clear PLAAFP tab data for new copied IEP**

  By default a draft copy of the most recently Finalized IEP exists for editing. If this option is checked, all data existing in the PLAAFP tab of the IEP draft copy will automatically be cleared after Finalizing.

- **List Meeting Attempts**

  If this option is checked, a grid appears on the IEP that can record the Date(s) and Description of attempts to schedule the IEP Meeting.

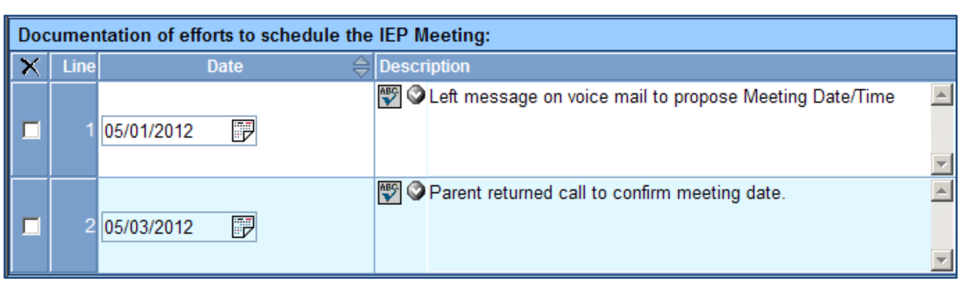


Figure 2-11 Documentation of Effort to Schedule IEP Meeting

Documentation of efforts to schedule the IEP Meeting:	
Date	**Description**
05/01/2012	Left message on voice mail to propose Meeting Date/Time.
05/03/2012	Parent returned call to confirm meeting date.

Figure 2-12 Documentation of Effort to Schedule IEP - Print Version

- **Medicaid Billing Agency (applies to Arizona districts only)**

  If the district is contracted with Southwest Billing for Medicaid, select SWBilling from the drop-down box.

  If selected, the Medicaid Billable information entered into a student's IEP will generate Consent to Claim Medicaid Reimbursement form and Medicaid DSC Health Related Services billing information form when the IEP is printed.

Printable Consent to Claim Medicaid Reimbursement

DISTRICT
CONSENT TO CLAIM MEDICAID REIMBURSEMENT

Edupoint School District receives funds from the Medicaid Direct Service Claiming (DSC) program for IEP covered services to eligible children through the Arizona Health Care Cost Containment System (AHCCCS), Arizona's Medicaid agency. Examples of covered services include speech therapy, assistance with daily living skills, special education transportation and nursing services.

Edupoint School District will need to determine if your child is eligible or should become eligible for the school-based Medicaid program. With the consent below, the District will submit your child's name to AHCCCS and their authorized agencies to verify eligibility for the DSC program. The school may use Medicaid (AHCCCS) benefits in which a child participates to provide or pay for the services in the student's Individualized Education Program (IEP). Parents are not required to sign up for or enroll in AHCCCS to receive IEP services or a free appropriate public education, nor are they responsible for any out of pocket expenses for these IEP services. **The school's use of this reimbursement program DOES NOT IN ANY WAY AFFECT OR IMPACT OTHER AHCCCS BENEFITS to which the child is entitled, including any otherwise eligible services outside of school.** Parents' refusal to allow access to their AHCCCS benefits does not relieve the school of its responsibility to ensure that all required services are provided at no cost to the parents. Granting of consent is voluntary on the part of the parent and may be revoked at anytime. If consent is revoked, that revocation is not retroactive (i.e., it does not negate an action that has occurred after the consent was given and before the consent was revoked). (CFR §300.154)

If my child is determined to be Title XIX eligible, Edupoint School District may submit a claim to my child's private insurance company for the sole purpose of obtaining a denial for the school based health related services being provided as prescribed in the IEP. Once the insurance carrier denies the claim, I understand that the school district will be able to seek reimbursement through AHCCCS. This reimbursement program will not in any way affect or impact our private insurance benefits.

The IEP services for which the school is seeking AHCCCS reimbursement are stated in the current IEP.

SERVICES ON IEP TO BE CLAIMED ARE CHECKED		ANNUAL AMOUNT OF SERVICE
Aide Assistance (Specific activities as stated on IEP)	☑	540 hours per year

Figure 2-13 Medical Related Services - Print Version

Printable Medicaid DSC Health Related Services

MEDICAID DSC HEALTH RELATED SERVICES
Complete all areas as needed

(includes all Health Aides assisting students that have Health Related Needs stated on the IEP. One-on-one and/or extensive individualized aide services must also be thoroughly described and listed as a Related or Supplemental Service)

Assistance with Personal Care/Activities of Daily Living

Duration/Frequency of Health Aide Assistance - Personal Care/ADL
3.00 hour(s) per day

The needs and services stated above have been identified and recommended by a qualified provider (Nurse, Psychologist, OT, PT, Speech Pathologist, etc.).

Signature/Position of Qualified Provider: ____________________ Date: __________

Signature/Position of Qualified Provider: ____________________ Date: __________

Figure 2-14 Medical Consent - Print Version

- **Indicate Parental Agreement**

  If this option is selected, a column appears in the IEP to indicate that the Parent has agreed to the attendance status (e.g. dismissal) of a Staff member from the IEP meeting.

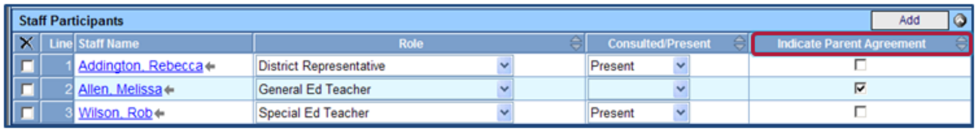


Figure 2-15 IEP Parental Agreement

- **Indicate Test Accommodations for Preschool (applies to Arizona districts only)**

  If this option is selected, districts can specify accommodations for testing that might be completed in kindergarten.

- **Transfer IEP Data to AZ SAIS (applies to Arizona districts only, and only if both SE and SIS are in use)**

  If selected, data will be automatically pulled from the ***Finalized* IEP** into **Special Ed Student Services** screen. Special Ed Student Services holds the container fields which are used to report information to the state.

  1. The **Primary Disability** selected in the Finalized IEP, Cover tab will populate the **Disability Code** for the student in Special Ed Student Services.

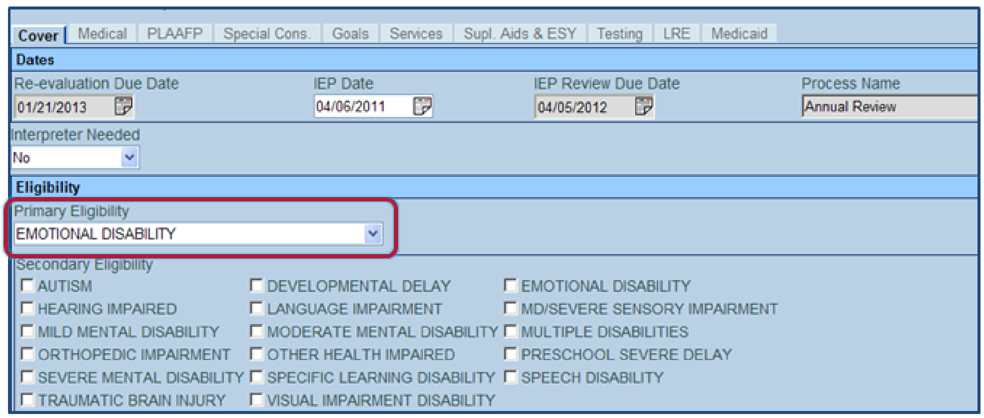


Figure 2-16 IEP Cover Tab

  2. The **Least Restrictive Environment** selection in the finalized IEP, LRE tab will populate the **Service Code** for the student in Special Ed Student Services.

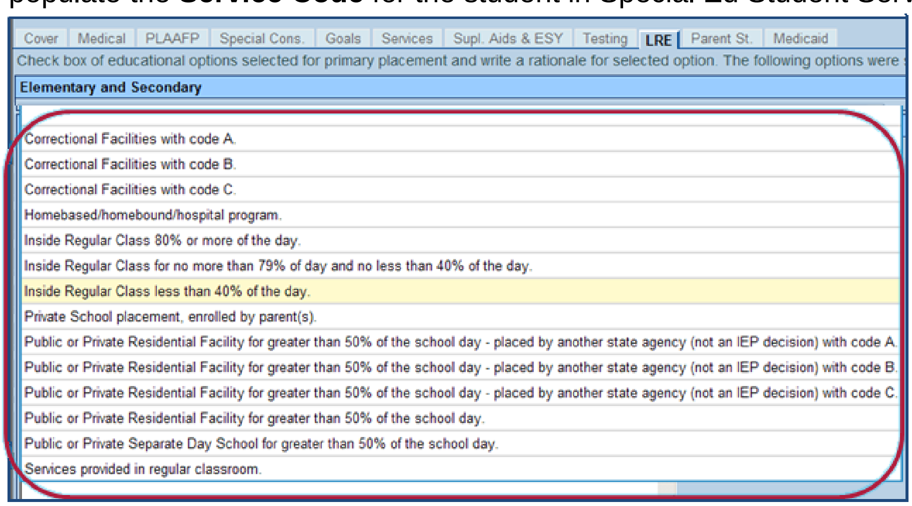


Figure 2-17 IEP LRE Tab

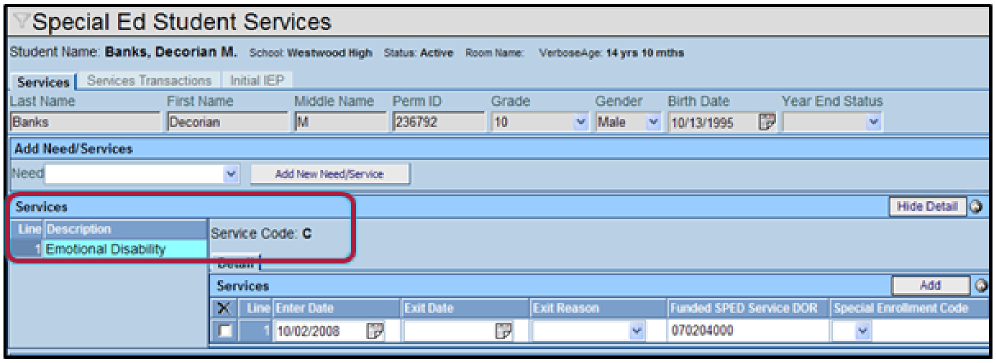


Figure 2-18 Special Ed Student Services Screen

- **Show Service Time in Minutes**

  If selected, Service time in the IEP will display in Minutes instead of the default Hours.

- **Service Use Provider Lookup**

  If selected, the Provider list in the Services grid of the IEP will be an independent list, separate from the Role table used in the Team list.

- **Goal Guide Number of Fields**

  If completed, The number of text boxes that display on the IEP goals tab correspond with the value in the new setup option. If the value is greater than 6, only 6 text boxes will display. When adding a goal, the description of the goal will have the values of the populated text boxes, separated by commas.

- **Validate Goal Guide Number of Fields**

  Validation to require that all textboxes be used to build a goal.

- **Validate Grading Periods**

  If selected, a specified number of Report Periods will appear on the Goal Page of the IEP, and Periods can be given default names.

- **Hide Prescore in IEP and Progress Report**

  Both of these fields display by default in these documents; they can optionally be hidden.

- **Hide Past ESY Services on IEP**

  Removes fields for discussion of past ESY history.

- **Use Standard Page Breaks on IEP**

  Printed document scrolls by default. This options sets ‘hard’ page breaks after the Participants list, before Goals, Services and Least Restrictive Environment.

- **Blank IEP Dates**

  The date in the IEP defaults to ‘today’, but can be set to blank. Validation will not allow the IEP to be finalized without a Date, however.

- **Separate Strengths and Needs**

  By default, there is a single textbox each for Student Strengths and Student Needs. This option creates an individual grid for each that can be pre-populated with specific areas that must be addressed (i.e. Reading, Math, Written Language, etc.) as defined at the district level.

- **Standard Goal Effective Date**

  Districts can opt to use a Goal format that aligns to State/Common Core Standards. This date designates a date when the default Goal Library is no longer available.

- **Append Standard code to Goal Description**

  This allows the code that applies to the Standard that the Goal references to be displayed before or after the Goal, or not at all.

- **Calendar Type for Medicaid Service Hours**

  If Services are Medicaid Billable, time will be calculated according to District Calendar.

- **Show Medicaid Signature Label on IEP**

  If selected, an additional column is available on the IEP Cover tab that allows for Medicaid Provider's signature.

- **Use Custom Progress Report Frequency Statement**

  Default statement in IEP indicates that 'Progress reports on goals will be sent home in accordance with the grading period'. This option allows for the creation of new default statement(s) at the district level, that can be customized within an individual IEP.

- **Show Language Proficiency Determination Details**

  If selected, Language Proficiency Determination details display.

- **Hide Medicaid Provider Signature Lines on Printable Medicaid Page**

  Line(s) for the Medicaid Providers' signature(s) display by default on the printable Medicaid page, but can be hidden with this option.

- **Hide Draft on IEP Cover Page**

  If selected, the word 'Draft' will not appear on IEP viewable or printable.

<u>IEP PROGRESS REPORT</u>

- **Include Benchmarks on Progress Report**

  Progress on Benchmarks can appear on Progress Reports in addition to Progress on Goals

- **Show IEP Date and Case Manager Info on Prog Report**

  Date of IEP, and Name and e-mail address of the Case manager can be optionally displayed on the printed Progress Report.

<u>IEP AND DOCUMENT OPTIONS</u>

- **Hide Participants' Name in IEP & Documents**

  Displays only Roles (i.e. General Education Teacher) of Participants without naming specific individuals in documents.

- **Prevent finalizing if the 'Draft' box on IEP or MET is checked**

  Draft' may be optionally displayed on printed documents. This option will not allow the documents to be finalized with 'Draft' in effect.

- **Use Student Test History for Standardized Tests**

  This option (available only to customers who use Synergy SIS as their student information system) allows a link to Student Test History to view all assessments that the Student has taken, which can be summarized in a narrative statement.

GRADE CATEGORY

- **Transition on IEP is Based on Age**

  Allows for appearance of Transition elements in the IEP to appear based upon the Age of the Student, which can be specified by the District. Transition elements can optionally appear at any age, but will be mandatory for any student of the **Transition Age** or older.

DOCUMENT OPTIONS TAB

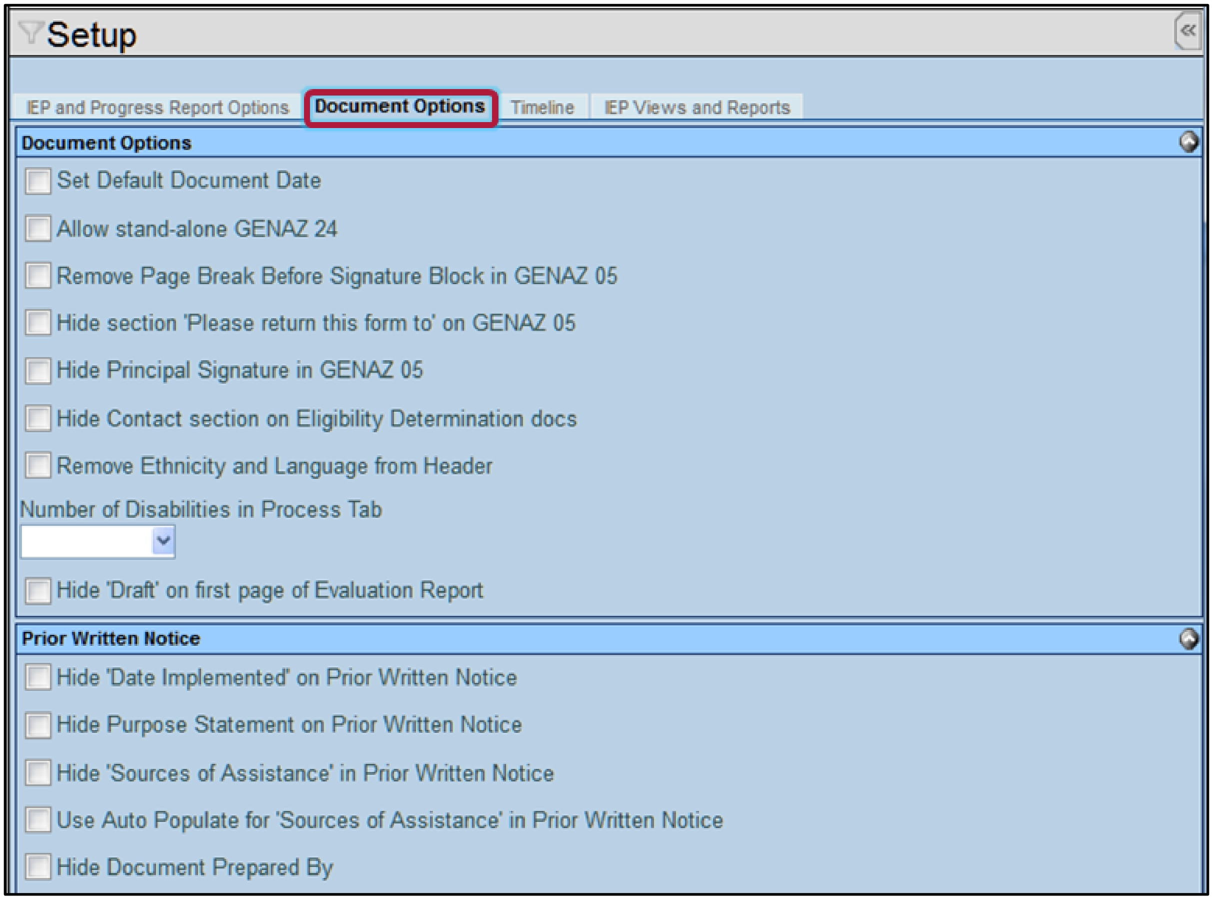


Figure 2-20 Setup Screen Document Options Tab

DOCUMENT OPTIONS

- **Set Default Document Date**

  Dates in documents other than the IEP are blank by default when first created. This option sets the default as the date the document is first created.

- **Allow stand-alone GENAZ 24**

  By default, the Synergy SE GENAZ 24 – Transfer IEP requires a finalized GENAZ 09 – IEP Meeting Request and finalized GENAZ 23 – Notice of Transfer before the GENAZ 24 – Transfer IEP can be generated. Checking the **Allow stand-alone GENAZ 24** removes this requirement.

- **Remove Page Break Before Signature Block in GENAZ 05**

  If the GENAZ 05 – Parent Permission is customized to add areas of assessment beyond a single page, the default break can be removed to allow for a neater appearance in print.

- **Hide section 'Please return this form to' on GENAZ 05**

  GENAZ 05 – Parent Permission has text fields available for name and phone of a contact person, that can be removed with this option.

- **Hide Principal Signature on GENAZ 05**
  A line for signature of principal displays by default on GENAZ 05 – Parent Permission, but can be hidden with this option.
- **Hide Contact section on Eligibility Determination docs**
  Statement that provides a contact person for parent(s), if they have questions about the determination, can be removed.
- **Remove Ethnicity and Language from Header**
  If selected, student's Ethnicity and Language are not displayed on printable documents.
- **Number of Disabilities in Process Tab**
  If district uses Secondary, Tertiary disabilities, number of drop-downs specified will be displayed
- **Hide 'Draft' on first page of Evaluation Report**
  If selected, the word 'Draft' will not appear on the Evaluation report, viewable MET report.

PRIOR WRITTEN NOTICE

- **Hide 'Date Implemented' on Prior Written Notice**
  A second date field is available in PWNs, if the decision will be implemented on a different date than the decision is reached, which can be hidden.
- **Hide Purpose Statement on Prior Written Notice**
  A default statement appears at the top of the printed PWNs to explain the reason for prior written notices. The statement can be removed from print with this option.
- **Hide 'Sources of Assistance' in Prior Written Notice**
  Sources of Assistance can be removed from print in the PWNs
- **Use Auto Populate for 'Sources of Assistance' in Prior Written Notice**
  Two sources of assistance appear by default in PWNs (usually District and State Department of Education). As many as four can be designated with this option.
- **Hide Document Prepared By**
  Within the Prior Written Notice, an optional field to identify the author of the document is available for completion. The statement can be removed with this option.

TIMELINE TAB

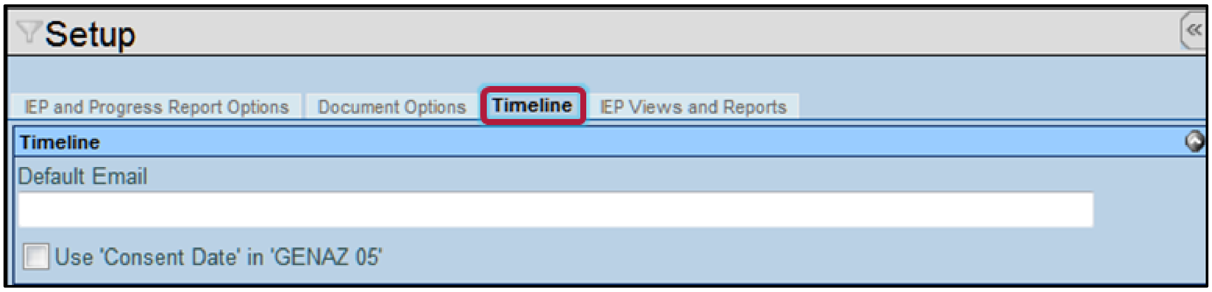


Figure 2-21 Setup Screen Timeline Tab

- **Default Email**

  When Timeline Reports are generated for emailing, a default email sender can be displayed rather than the actual sender's email.

- **Use 'Consent Date' in 'GENAZ 05'**

  Timelines created for GENAZ 05 – Parent Permission will use "Consent Received Date" field in Evaluation Tab.

IEP VIEWS AND REPORTS

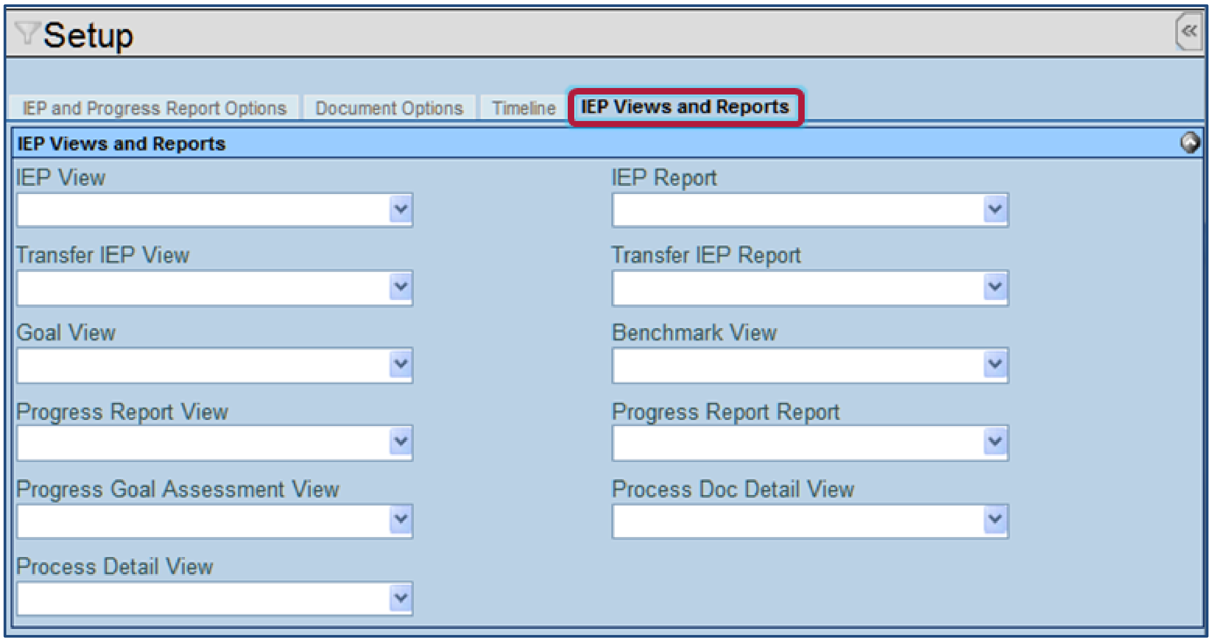


Figure 2-22 Setup Screen IEP Views and Reports

The IEP's Views and Reports tab is setup to work with a district's specific documents and shouldn't need to be modified following setup.

Special Ed School Team

The Special Ed School Team is an optional tool used by districts who would like a Default Team List set up for each special education student.

Navigate to Special Ed School Team Screen

1. Focus to the specific school.
2. Open the Synergy SE Navigation Tree by clicking on the **Tree** button.

Figure 2-23 Synergy Navigation Tree

3. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▷ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.
4. Under the Synergy SE folder, click on the name **System** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.

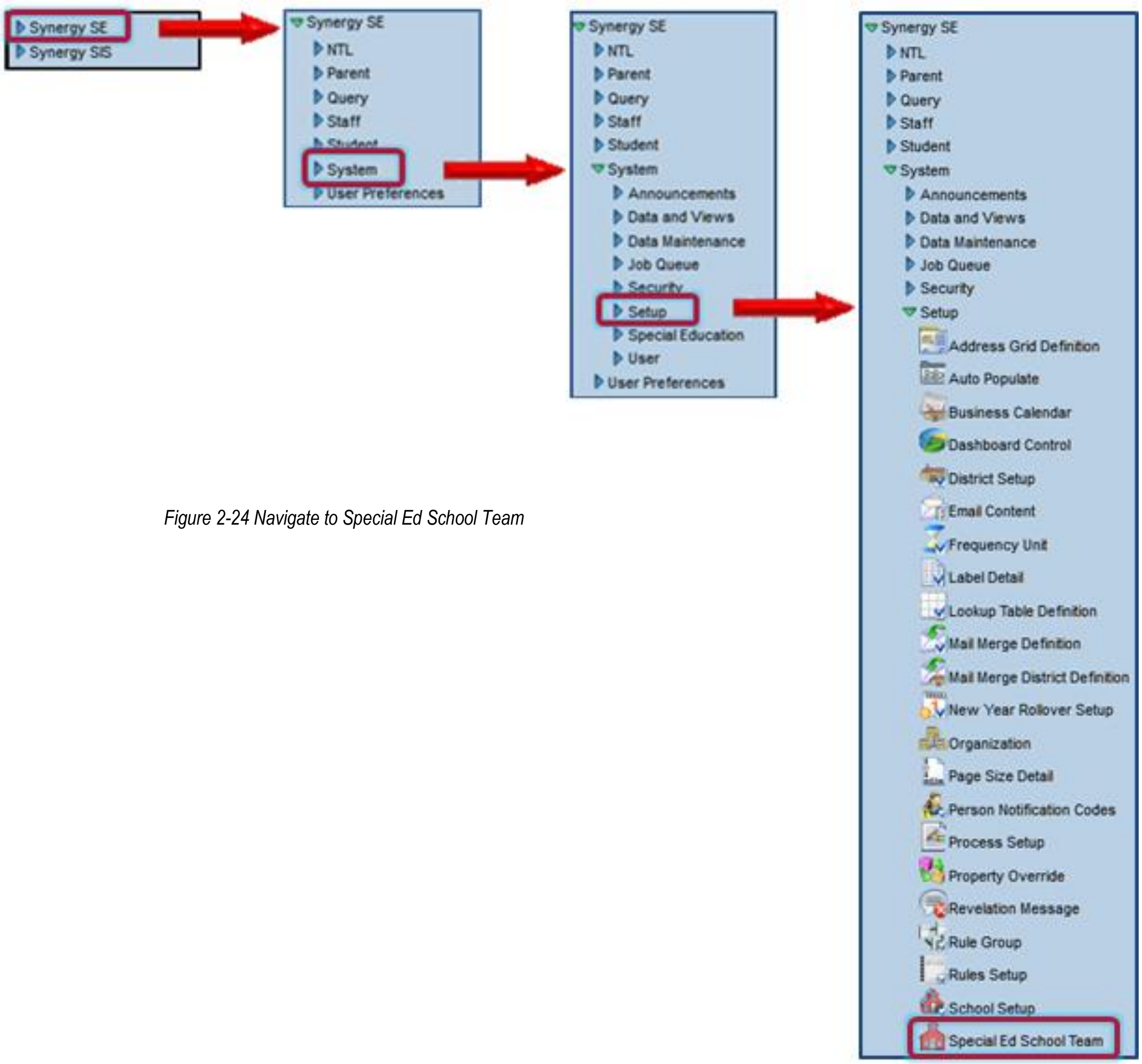


Figure 2-24 Navigate to Special Ed School Team

1. Click on the name **Setup** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.

2. Click on the name **Special Ed School Team.** The Special Ed School Team screen displays.

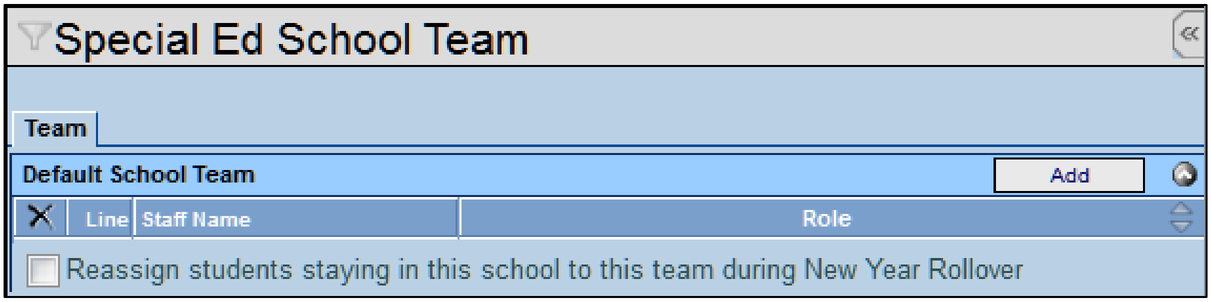


Figure 2-25 Special Ed School Team Screen

Set Up New Special Ed School Team

1. Click **Add**. A new staff row will displays on the Default School Team.

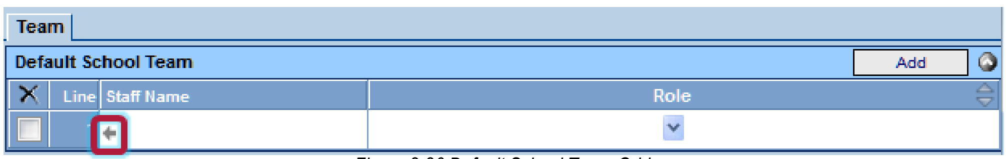


Figure 2-26 Default School Team Grid

2. Click the in the **Staff Name** field to open the Find: Staff screen.
3. Enter all or part of staff member's Last Name, First Name.
4. Click **Find**. Search Results displays a list of matching criteria.

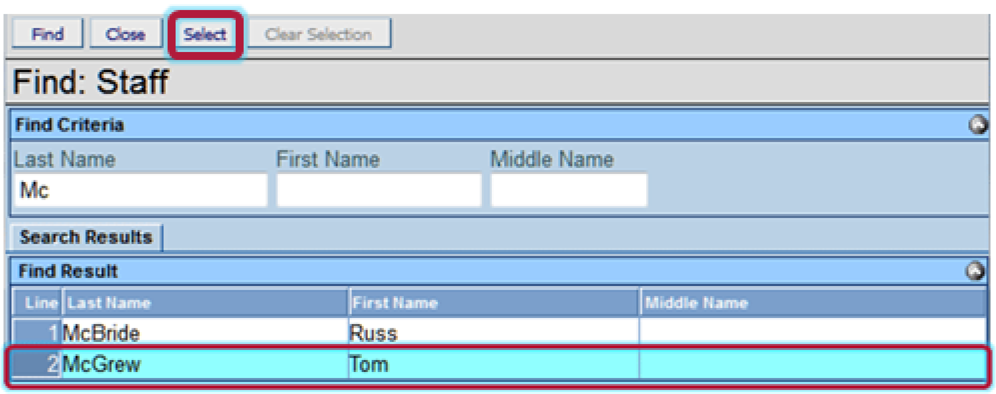


Figure 2-27 Find: Staff Screen

5. Click line of staff name. Line highlights.
6. Click again or click **Select.** The Find: Staff screen closes and the staff name displays.

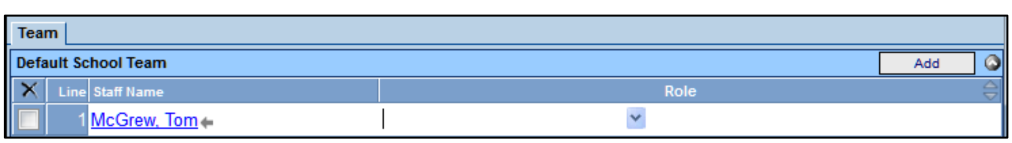


Figure 2-28 Default School Team Grid Populated with Staff Name

7. Click **Role** and select from list.
8. Continue adding staff to build the default Special Ed School Team.
9. Click Save at the top of the screen when finished.

Delete a Team Member

1. To delete a team member, check on the line of the staff name to delete.
2. Click Save.

PHOTO ATTACH

Photos can be attached to the student's record in bulk or individually.

MASS ATTACH PHOTOS TO STUDENT RECORDS

Use Student Photo Attach to attach photos to student records in bulk.

NAVIGATE TO STUDENT PHOTO ATTACH

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

Figure 2-29 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Expand the **Student** folder by clicking on the name Student or pointing next to the word. Once clicked, the triangle will turn green and point downward.
4. Expand the **Setup** folder by clicking on the name Setup or pointing next to the word. Once clicked, the triangle will turn green and point downward.

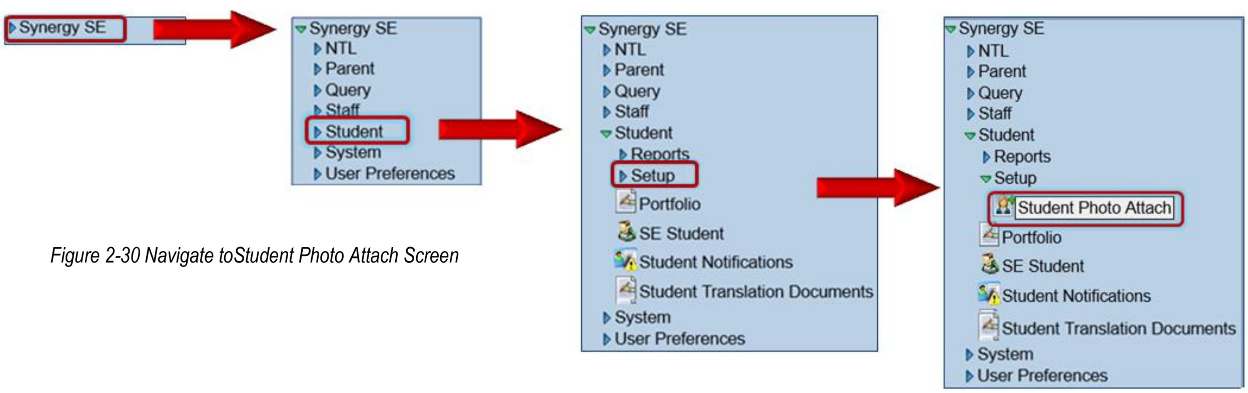


Figure 2-30 Navigate toStudent Photo Attach Screen

5. Click on the name **Student Photo Attach**. The Student Photo Attach screen opens.

Figure 2-31 Student Photo Attach Screen

Part 1 will guide you through the process of installing the photo and text files needed prior to utilizing the Student Photo Attach feature. Part 2 will guide you through the process of using Student Photo Attach.

Requirements:

- Text (*.txt) file containing identification numbers and associated photograph file name - Provided by the photo vendor
- Photos in *.png format, sized in pixels to 100 (wide) x 125 (high) - Provided by school district photo vendor

Part 1 Install Photo and Text Files Received from Vendor

1. Create **\Photo Import directory** on local hard drive or network drive.
2. Create these sub-folders in \Photo Import directory.
   - **\Photos**
   - **\LinkText**
3. Open **Photos**.
4. Copy **individual photo files**, each in *.png format, into this folder.
5. Open **\LinkText**.
6. Copy ***.txt file** into this folder.
7. Verify ***.txt file** contains a separate line for each person with identification number and associated photograph file name in format of:
   "xxxxxxxxx","photographfilename.png"

Note: The reference file must have the format as shown below. The student number must match the student.png file.

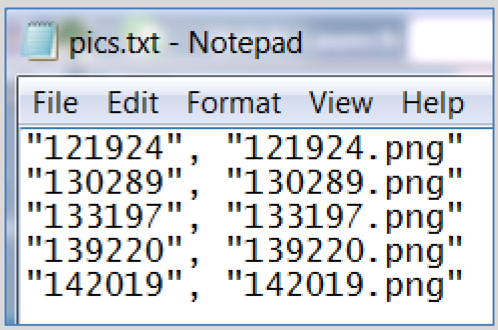


Figure 2-32 Reference File Example

Part 2 Run Photo Attach Application

1. Click Please click on this link to run the photo attach application. Photo Attach Window opens. URL (for Synergy SE) and Log in Name are auto-populated.

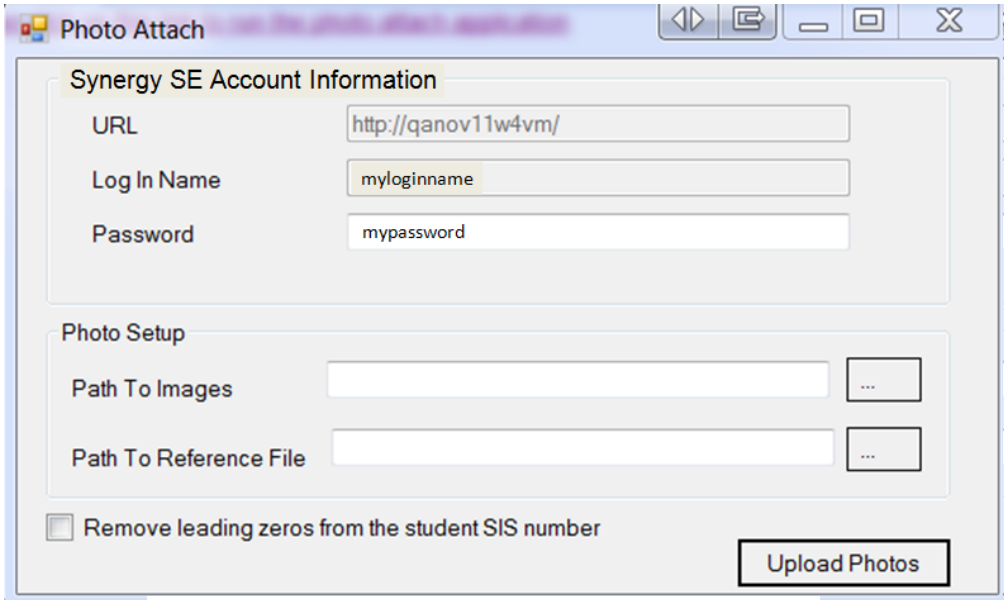


Figure 2-33 Photo Attach Screen

2. Enter your **Password**.
3. Type **Path To Images** or click [...] and browse to local path where images to upload are stored. This could be a CD or DVD provided by photo company.
4. Type **Path To Reference File** or click [...] and browse to reference file. Reference file maps SIS number to file name. If this field is blank then file name is assumed to be SIS number.
5. Check **Remove leading zeros from student SIS if number,** if appropriate. If photo company has placed leading zeros in Student ID, check to remove them during photo installation.
6. Click [Upload Photos]. A message will display with total updates and total errors. There is also an option to open a log file to see the status of the upload.

If an error occurs in upload look at log file for errors. Total number of permanent ID numbers in \LinkText file should equal total number of photos in \Photos file. Verify that the permanent ID numbers in \LinkText match the permanent ID numbers in Synergy SE.

Attach an Individual Photo to a Student Record

Use the Attach Photo option when attaching a photo to a single student record.

Navigate to Photo Attach Option

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

Figure 2-34 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▶ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.

3. Expand the **Student** folder by clicking on the name Student or pointing next to the word. Once clicked, the triangle will turn green and point downward.

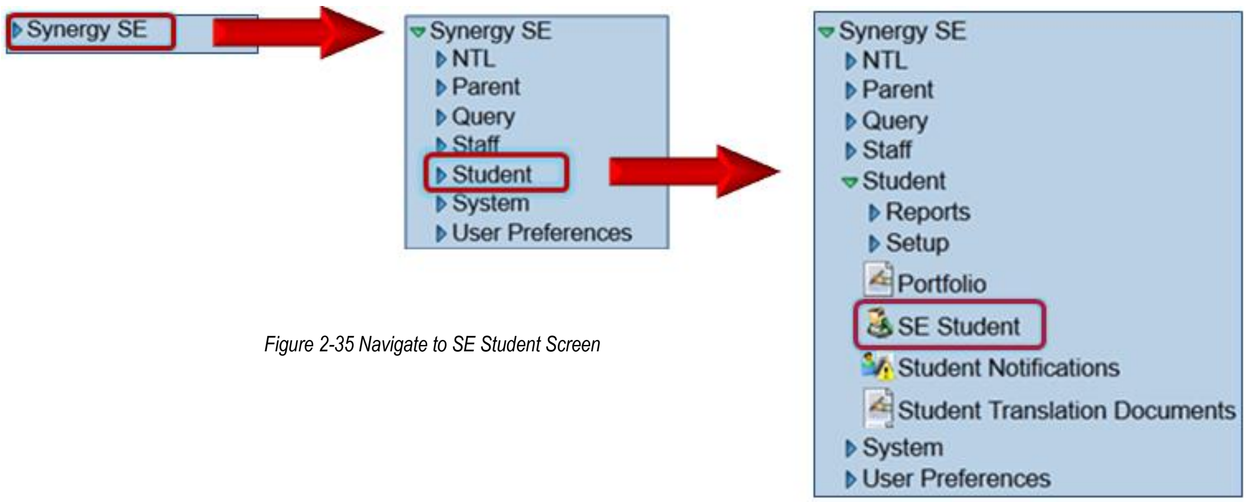


Figure 2-35 Navigate to SE Student Screen

4. Click on the name **Student (or SE Student)**. The Student screen opens.
5. Once the desired student record is in view, click on the **Menu**.

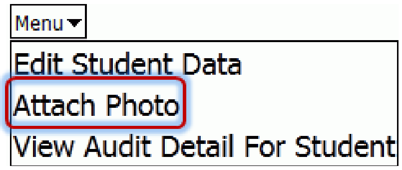


Figure 2-36 Student Screen Menu Drop-down

6. Select **Attach Photo**. A new window opens.

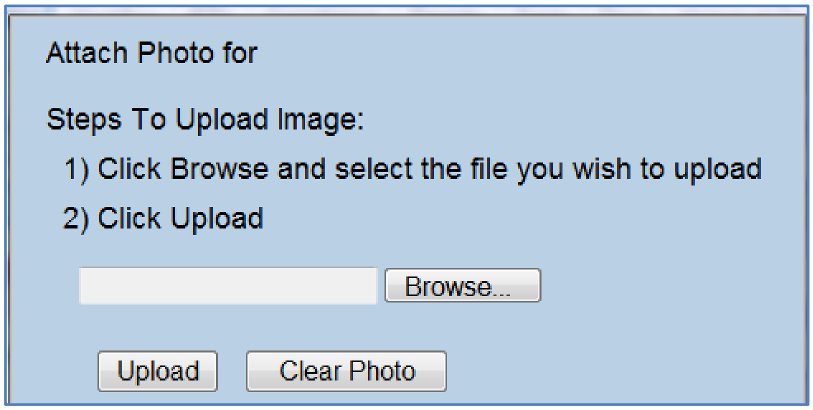


Figure 2-37 Attach Photo Screen

7. Click **Browse** and select the file.
8. Click **Upload.** A web message displays that the upload was successful.

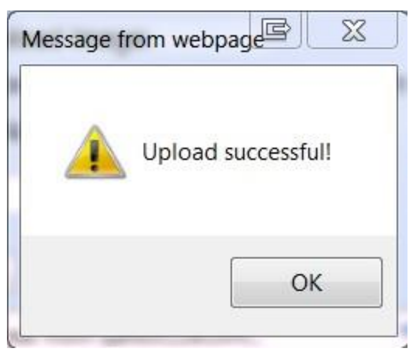


Figure 2-38 Web Message

Remove Individual Photo from Student Record

To clear a photo on an individual student record, follow the instructions above. When the Attach Photo screen displays:

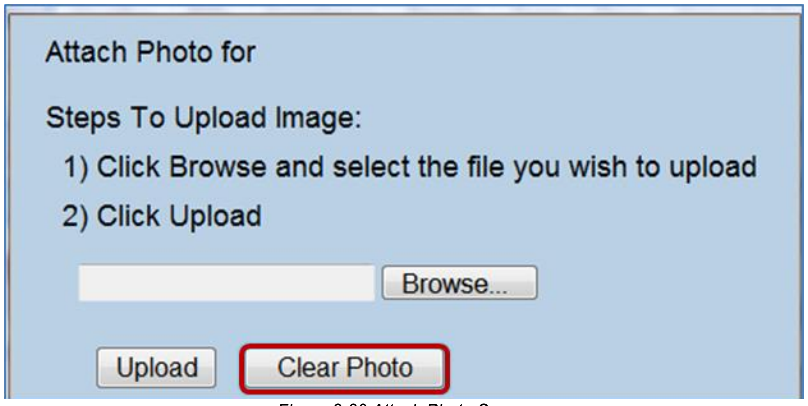


Figure 2-39 Attach Photo Screen

1. Click **Clear Photo**. A confirmation message displays.

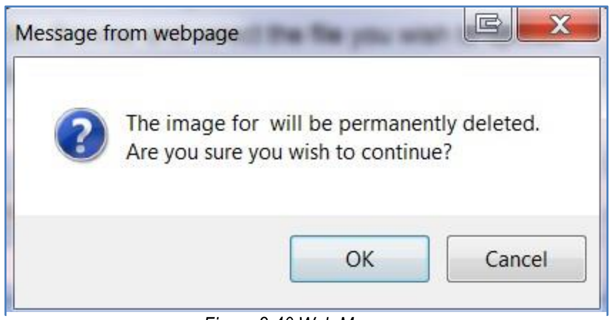


Figure 2-40 Web Message

2. Click **OK.** Another web message displays.

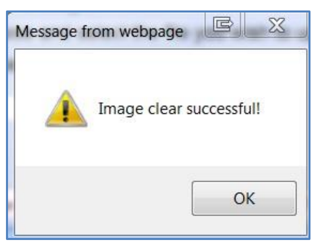


Figure 2-41 Web Message 2

Chapter Three:
USERS AND SECURITY

In this chapter, the following topics are covered:

- ► Special Ed Roles
- ► User Special Ed Settings
- ► Security Definition
- ► PAD Security
- ► Manual Process Moves
- ► Student Document Unlock Security

SPECIAL ED ROLES

Reference: The following chapter covers User and Security configuration relating to Synergy SE ***only.*** For more information on the complete setup and configuration of Staff and User records, please refer to *Synergy SIS System Administrator Guide.*

Special Ed User Roles are assigned to staff records and display in the student's Team List and Synergy SE documents that display the Special Ed Team List. Role Names are configured using the Role screen.

NAVIGATE TO THE ROLE SCREEN

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

Figure 3-1 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▷ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.
3. Under the Synergy SE folder, click on the name **System** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.
4. Under the System folder, click on the name **Special Education** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.

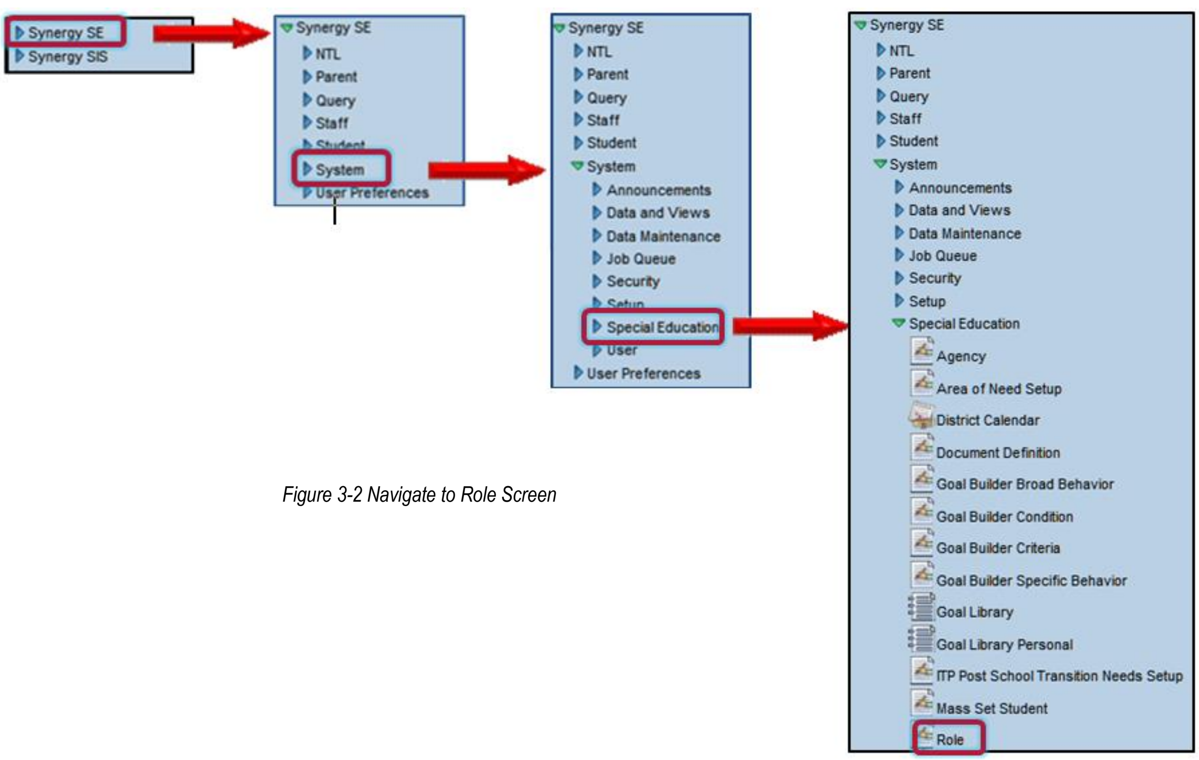


Figure 3-2 Navigate to Role Screen

5. Click on the name **Role**. The Role screen opens.

VIEW AND ADD ROLES

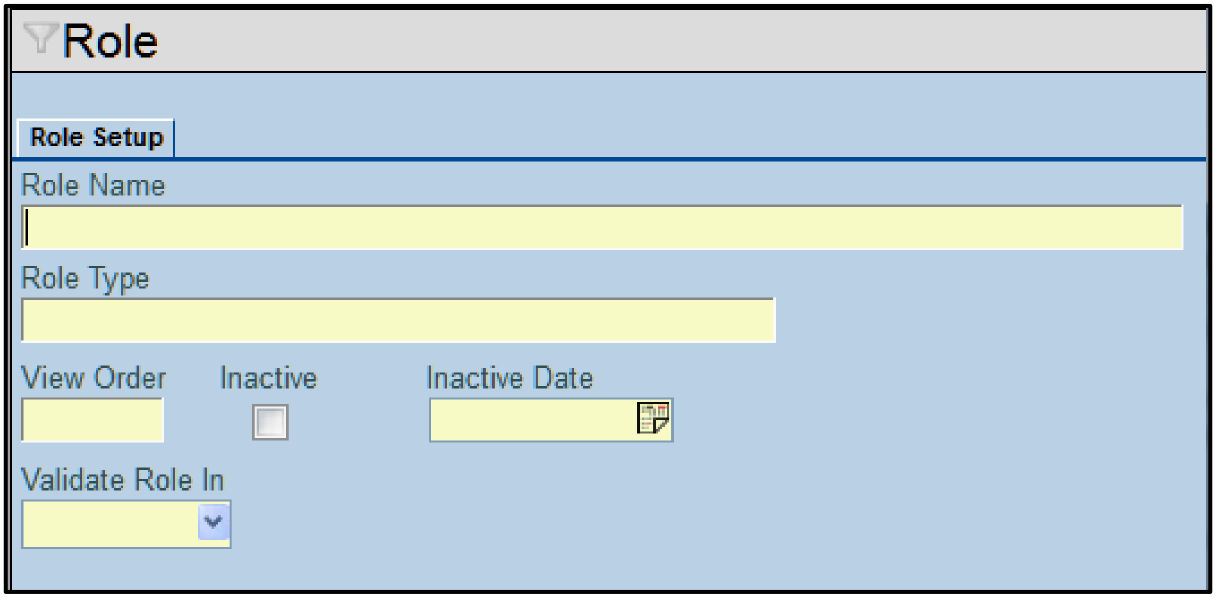


Figure 3-3 Role Screen

1. To view all current Roles that have been setup in the system, click , then clink at the top of the screen.
2. To view, edit or remove an existing role, double click on the desired **Role Name.** The Role: Find Result screen closes and the Role screen displays the information.
3. To add a new Role, click at the top of the screen.

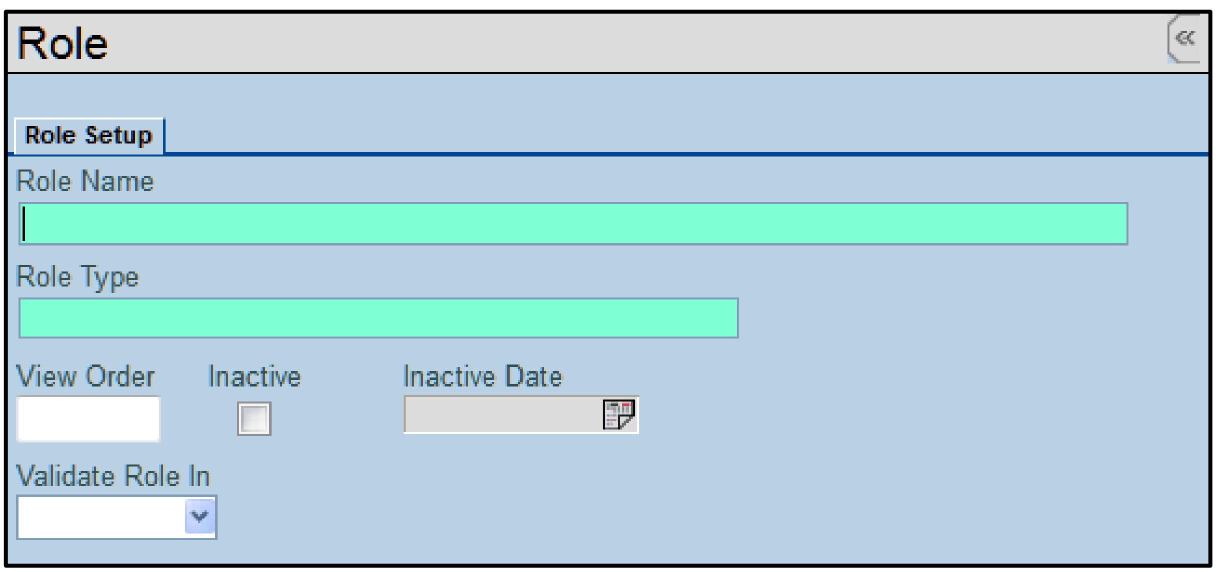


Figure 3-4 Add Role Screen

4. Using the system's standard Role Type formatting, enter the **Role Type**, which is the Role Name in upper-case. Use underscores in between words rather than spaces.

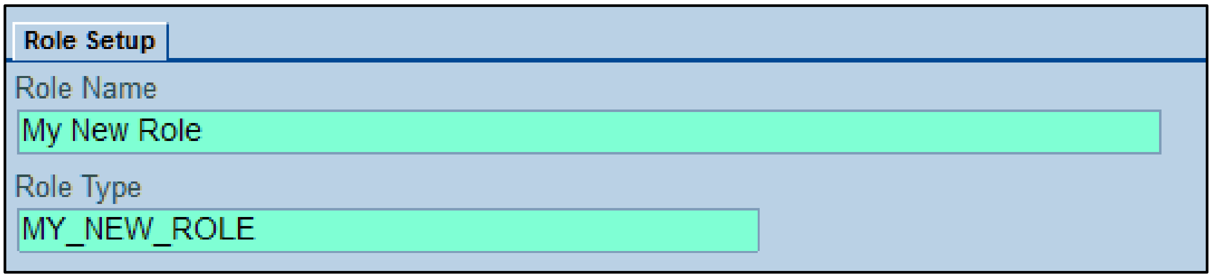


Figure 3-5 Add Role Name and Type

5. Click 

.

The new Role Name is now available in the User screen and the student's Team List.

THE USER SCREEN

NAVIGATE TO THE USER SCREEN

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

Figure 3-6 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **User** or pointing right next to it. The triangle will turn green and point downward.
5. Under the User folder, click on the name **User**. The User screen opens.

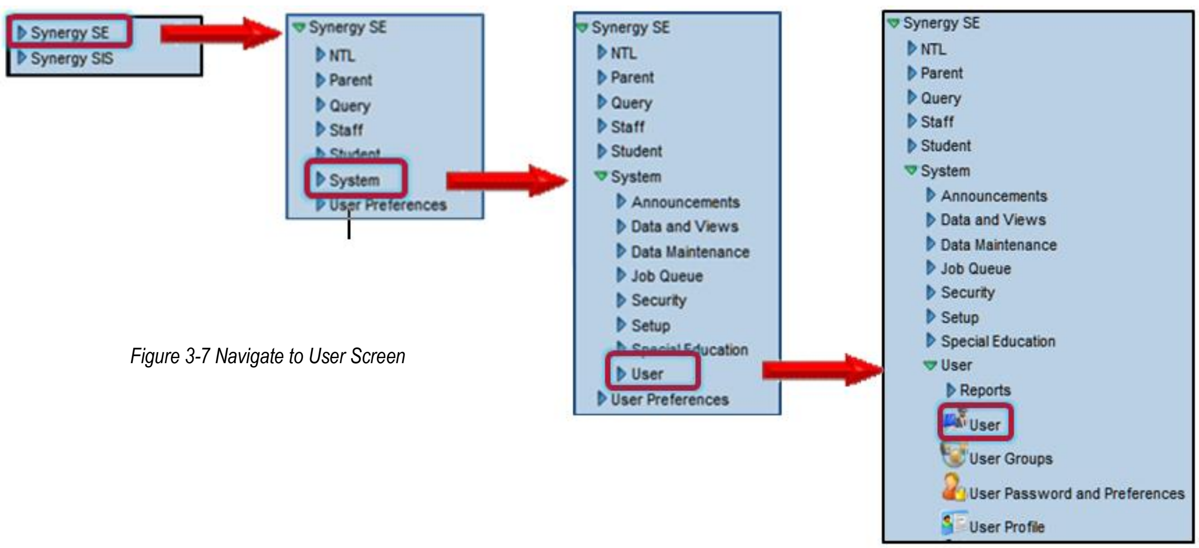


Figure 3-7 Navigate to User Screen

6. Click on the **Security Settings** tab.

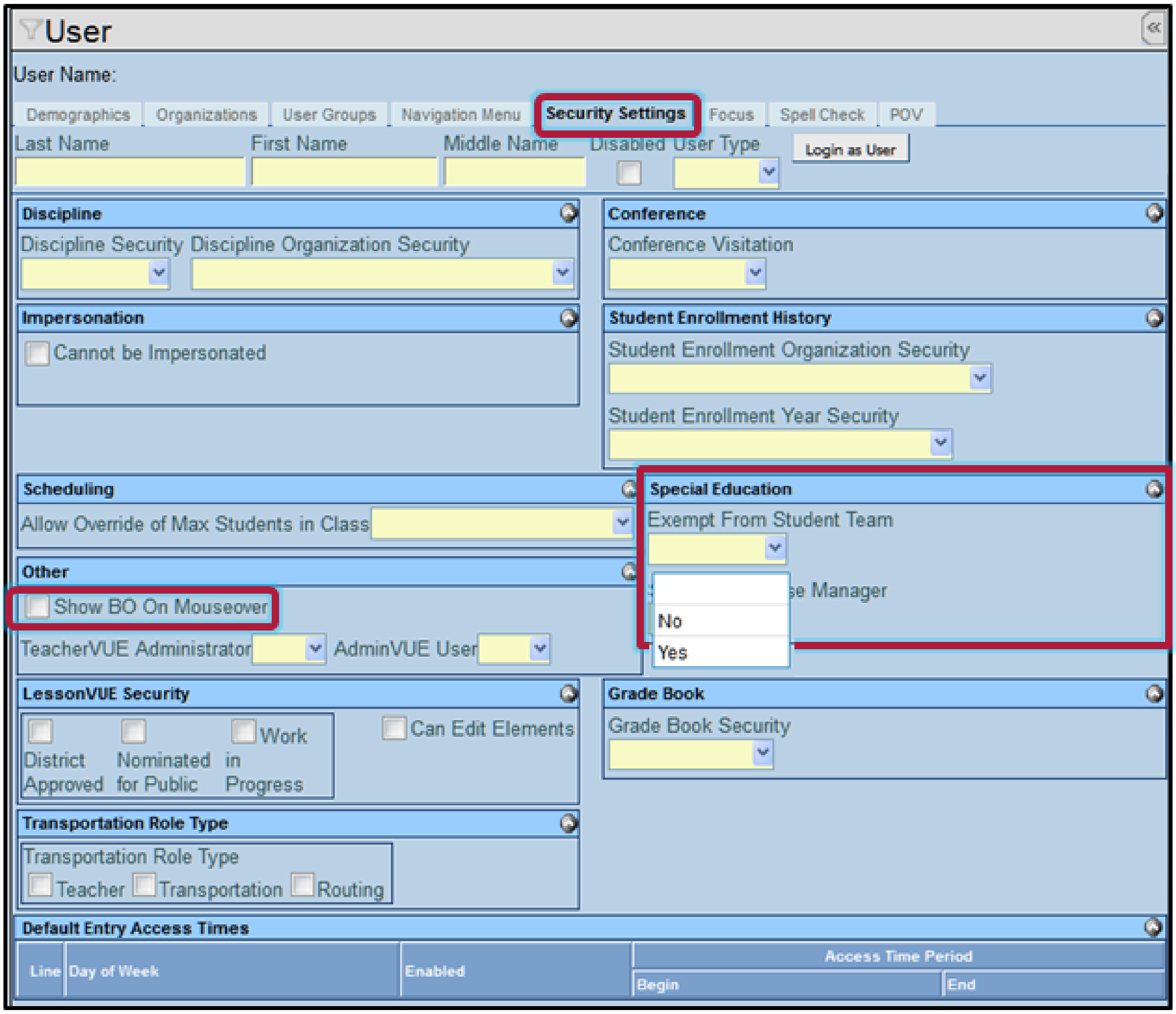


Figure 3-8 User Screen Security Settings Tab

USER SPECIAL ED SETTINGS

The field that pertains to Synergy SE Users on the User screen is Exempt From Student Team.

- If **No** is selected In Exempt From Student Team, the user will only be able to view and access students where the user is a team member.
- If **Yes** is selected,the user will be able to access all students at schools they have access, regardless of whether they are a member of the student's team.
- For System Administrators, check **Show BO On Mouseover**. This will ensure that the user can locate Business Objects when searching for system property lables. (*See Locating AutoPopulate and Lookup Tables in Chapter Five of this guide.*)

THE STAFF SCREEN

NAVIGATE TO THE STAFF SCREEN

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

Figure 3-9 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **Staff** or pointing right next to it. The triangle will turn green and point downward.
4. Under the Staff folder, click on the name **Staff**. The Staff screen opens.

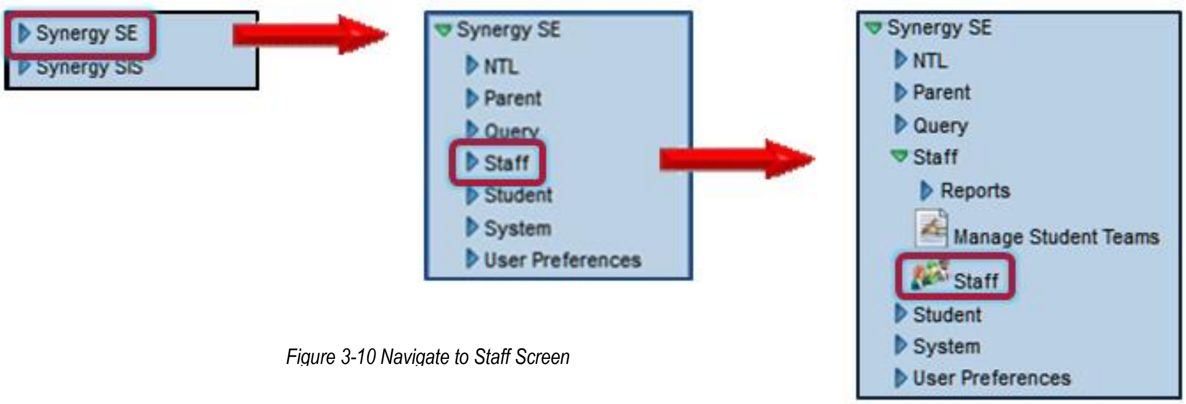


Figure 3-10 Navigate to Staff Screen

5. Click on the **SpecialEd** tab.

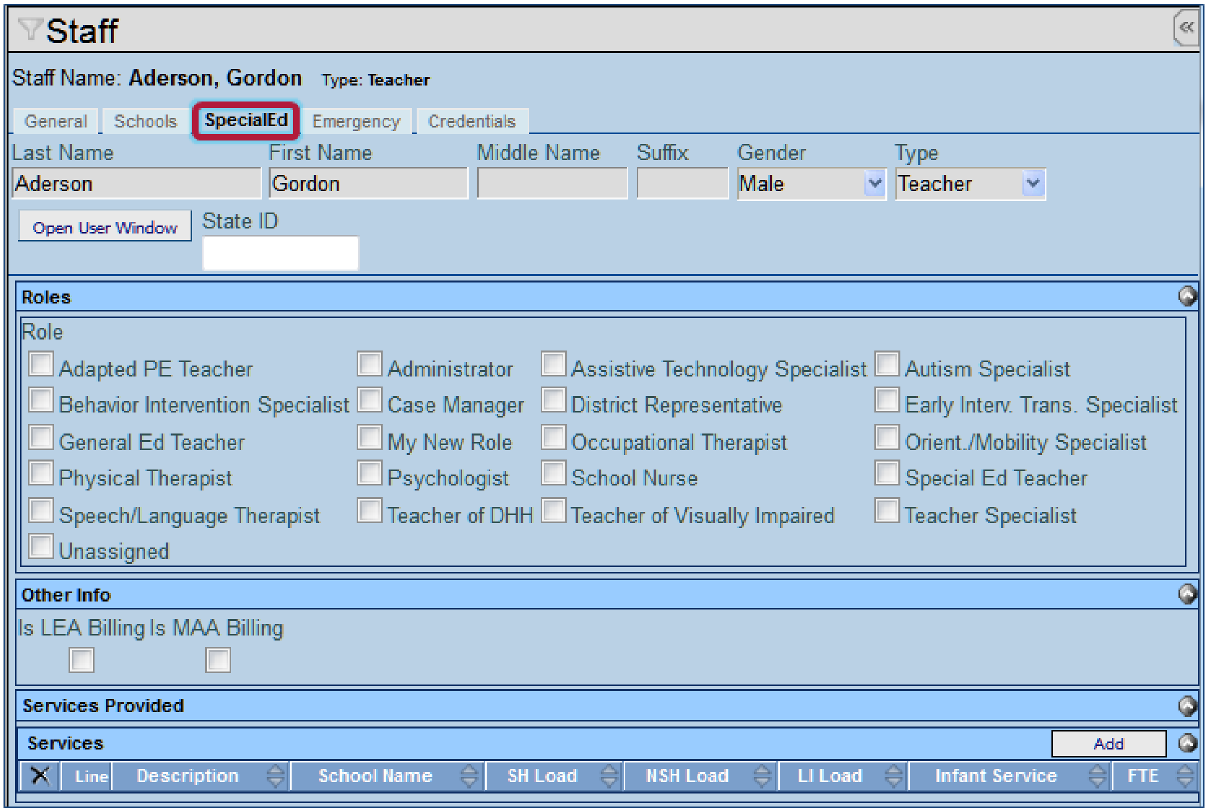


Figure 3-11 Staff Screen SpecialEd Tab

ASSIGN STAFF ROLE

The SpecialEd tab in the Staff screen displays the Roles available to assign to Staff records. One Role can be assigned to each user. This Role displays along with the staff member name as they are assigned to student teams.

Security Definition Screen

The Security Definition screen contains

- **Group Access Tab**

  Allows configuration of documents and screens for User Groups.

- **Group Property Access Tab**

  Allows configuration of document properties (text fields, drop-downs) for User Groups.

- **User Access Tab**

  Allows configuration of documents and screens for specific Users.

- **User Property Access Tab**

  Allows configuration of document properties (text fields, drop-downs) for specific Users

Navigate to the Security Definition Screen

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

Figure 3-12 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.

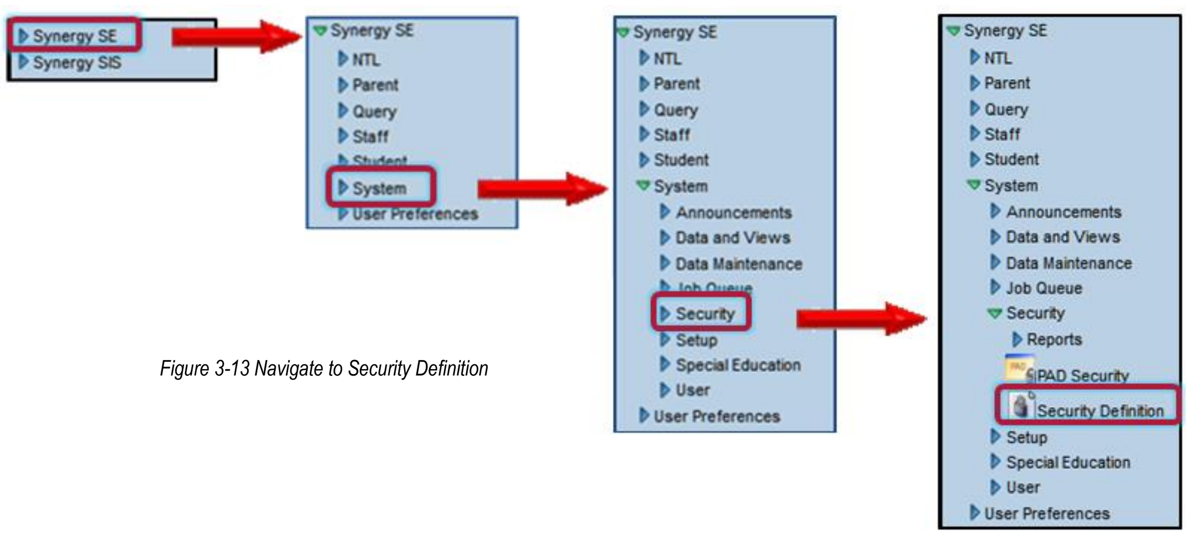


Figure 3-13 Navigate to Security Definition

4. Under the System folder, click on the name **Security Definition**. The Security Definition screen opens.

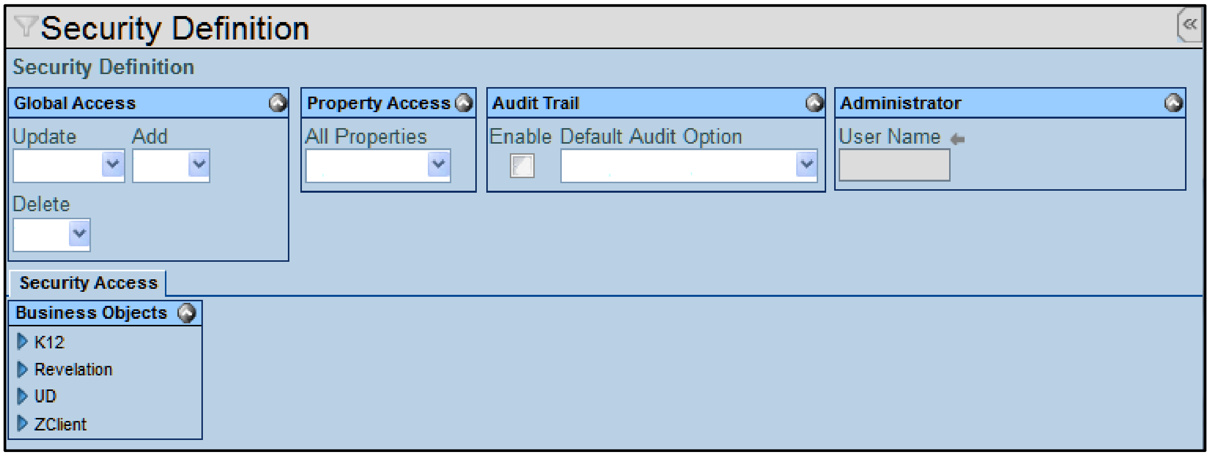


Figure 3-14 Security Definition Screen

Document Access for User Groups

Document Access is configured on the Security Definition screen through the Security Access tab.

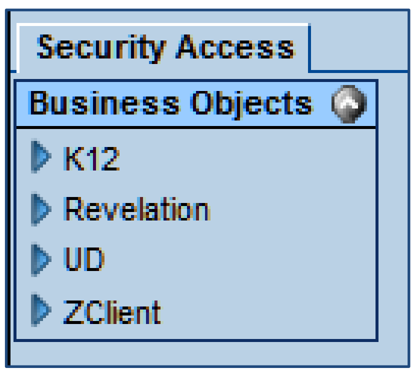
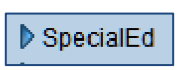


Figure 3-15 Security Configuration Screen Security Access Tab

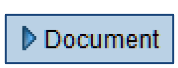
This *example* will restrict the Special Ed Teacher User Group from update ability in the MET Report document.

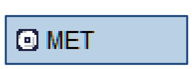
Locate the MET Report document: K12 > SpecialED > AZ > Document > MET

(a) Click on  then scroll down and

(b) Click on  then scroll down and

(c) Click on  then scroll down and

(d) Click on  then scroll down and

(e) Click on .

(f) Finally, scroll back up until the Security Grid is in view

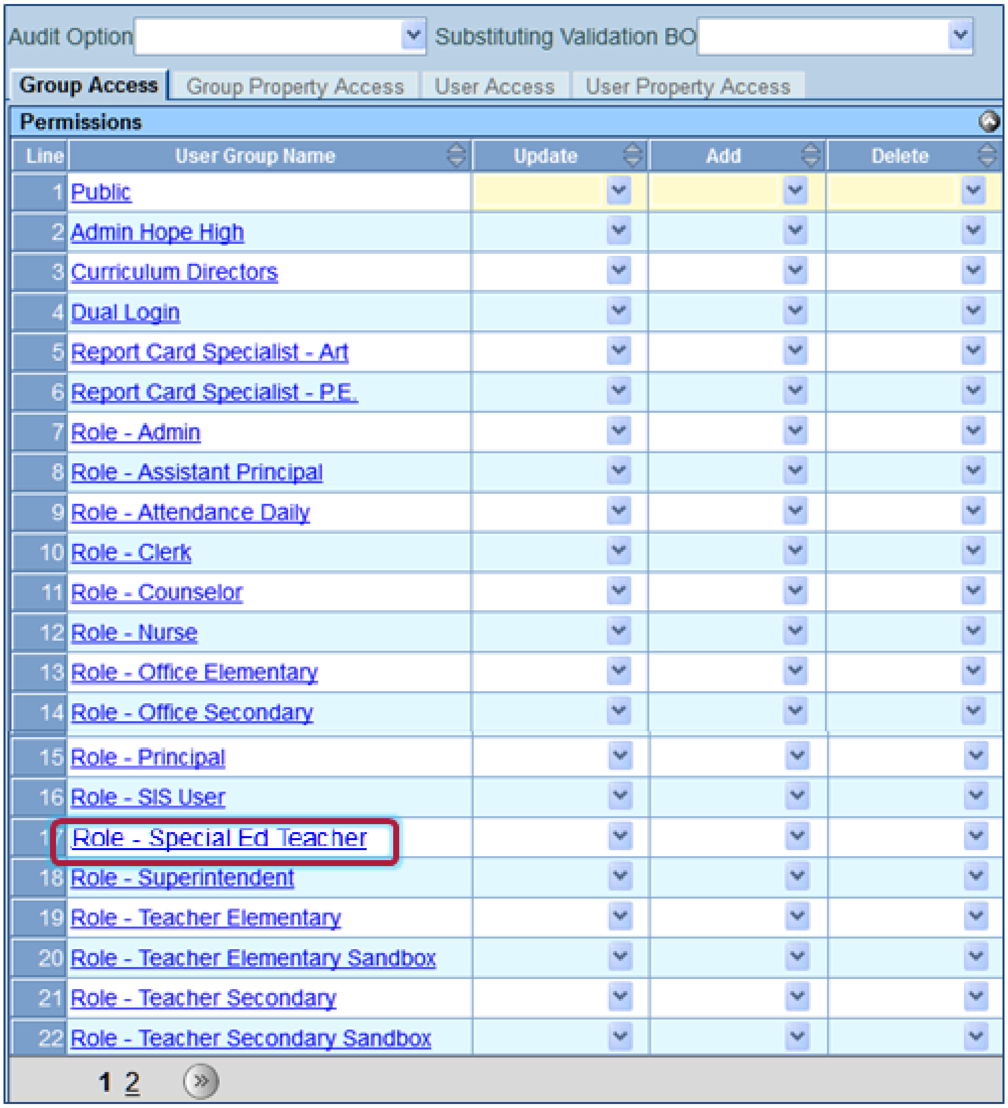


Figure 3-16 Security Configuration Security Grid

5. Click on Role – Special Ed Teacher.
6. Click on the drop-down in the **Update** column and select **View**. This will determine that users in the Special Ed Teacher User Group will be able to view the MET Report.
7. Click on the drop-down in the **Add** column and select **No**. This will determine that users in the Special Ed Teacher User Group cannot create any new MET Report documents.
8. Click on the drop-down in the Delete column and select No. This will determine that users in the Special Ed Teacher User Group cannot delete a MET Report document

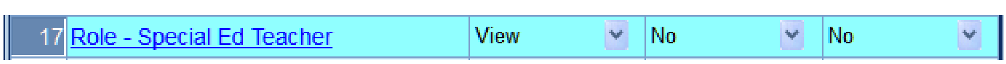


Figure 3-17 Security Configuration Security Grid Example

SECURITY SECTIONS WITHIN A DOCUMENT

GROUP ACCESS CHANGES

This example will give users in the Role - Special Ed Teacher to update the Instructional Strategies section of a Behavior Intervention Plan.

1. To locate the Instructional Strategies section of the Behavior Intervention Plan in Security Definition, open a Behavior Intervention Plan for a student.
2. Navigate to the **Method** tab.
3. Hover the mouse over **Strategy** under **III. Instructional Strategies** section.

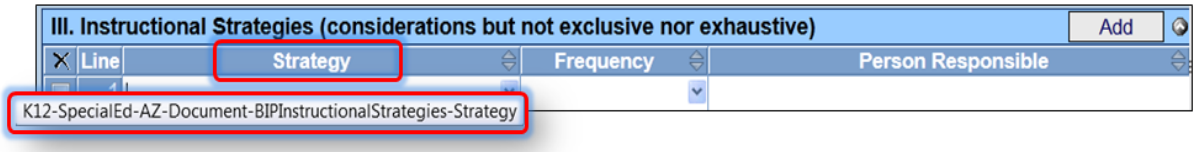


Figure 3-18 Behavior Intervention Plan Screen SpecificsTab Strategy

A box pops up with the name of the table. This functionality is referred to as show BO on mouseover. See: [User Special Ed Settings.]

4. Repeat the same by hovering over **Frequency**.

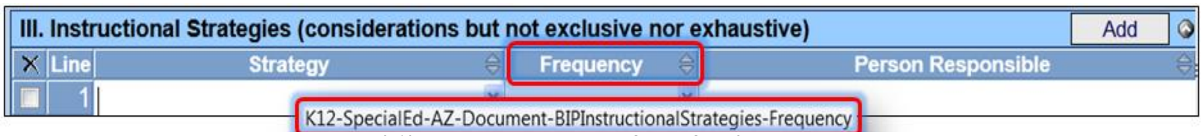


Figure 3-19 Behavior Intervention Plan Screen SpecificsTab Frequency

5. Repeat the same by hovering over **Person Responsible.**

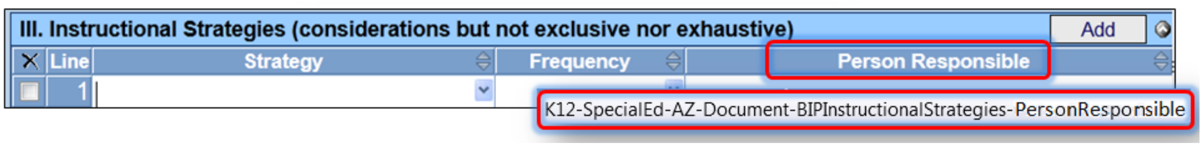


Figure 3-20 Behavior Intervention Plan Screen SpecificsTab Person Responsible

Based on the Business Object information, the properties to search for are **K12-SpecialEd-AZ-Document-BIPInstructionalStrategies-Strategy, K12-SpecialEd-AZ-Document-BIPInstructionalStrategies-Frequency,** and **K12-SpecialEd-AZ-Document-BIPInstructionalStrategies-PersonResponsible.**

6. Return to the **Security Definition** screen.
7. Navigate to **K12>SpecialEd>AZ>Document**.
8. Select **BIPInstructionalStrategies**.

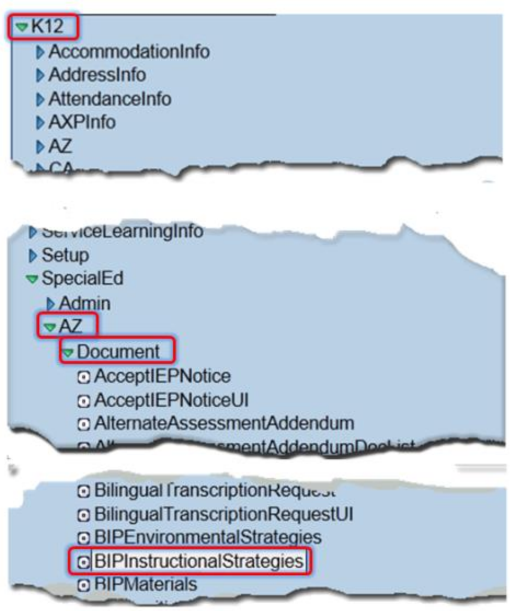


Figure 3-21 Security Definition Screen

9. Scroll back up the screen to view the From the **Group Property Access** tab in the **BIPInstructionalStrategies** grid,
10. Click on **Role - Special Ed Teacher**.

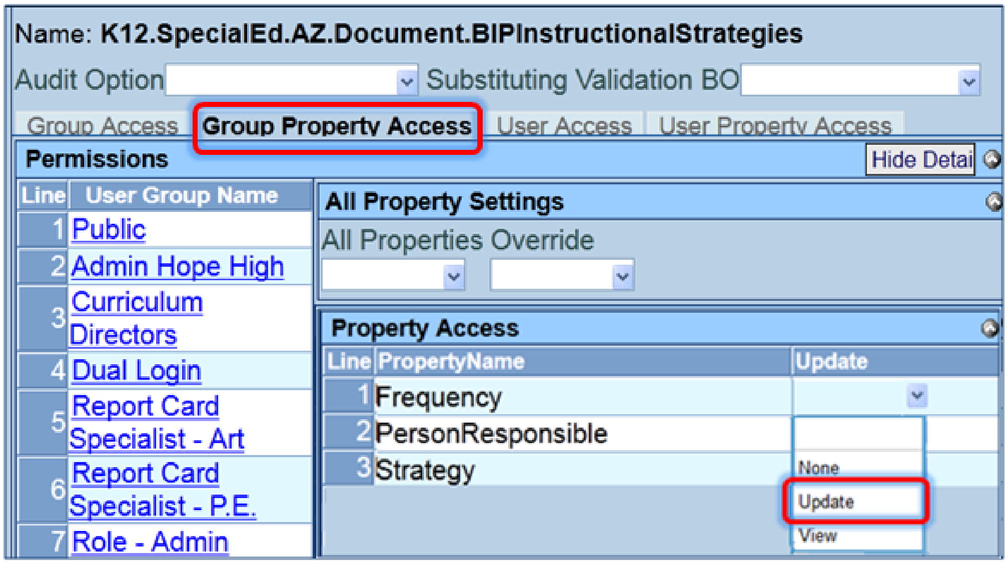


Figure 3-22 Security Definition Screen Group Property Access Tab

11. Select **Update** from the drop-down boxes.
12. Click Save when finished.

This will determine that users in the Role - Special Ed Teacher group can update the Frequency, Person Responsible and Strategy in the Behavior Intervention Plan.

INDIVIDUAL USER ACCESS CHANGES

Changes made to Individual Users will override changes made to User Groups. Security setting changes for Individual Users work similarly to changes made for User Groups.

1. Select the **User Property Access** tab.

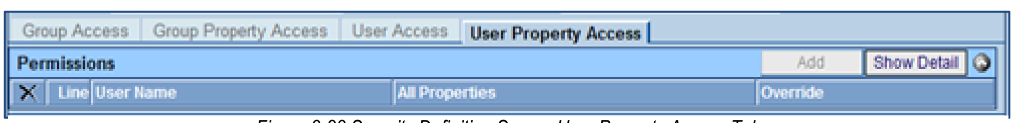


Figure 3-23 Security Definition Screen User Property Access Tab

2. Click Add to add the individual User to the Permissions list. The Find: RevUser screen displays.

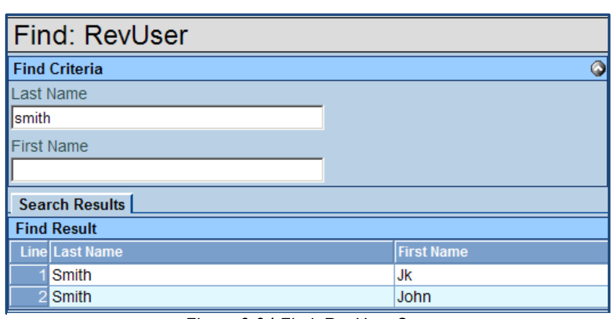


Figure 3-24 Find: RevUser Screen

3. Enter any or all of the information in the white fields.
4. Click Find or press ENTER.

5. The staff matching the criteria entered is listed in the Search Result grid. Click on the **name.** The row highlights in green.
6. Click Select at the top of the screen or just click on the **name** again The Find: RevUser screen closes.
7. Click on the **User Name** row to highlight.

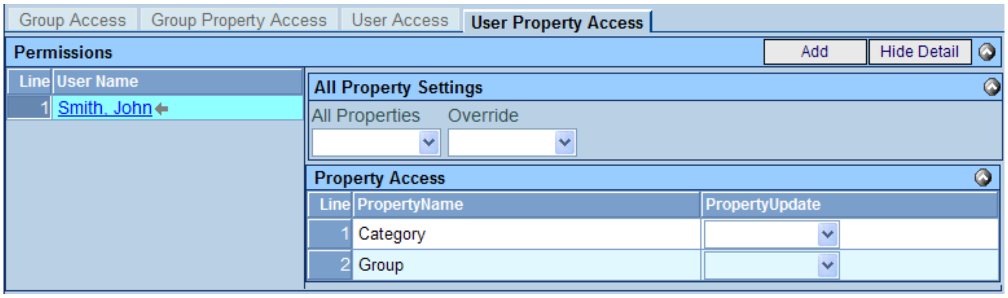


Figure 3-25 Security Definition Screen User Property Access Tab all Property Settings Grid

8. Make changes to the **Property Access** as instructed in the example above.
9. Click Save.

Delete Functions

Remove Delete Button from the IEP for Specific User Groups

1. Locate the **IEP** in **Security Definitions K12>SpecialEd>IEP>IEPInfo**.

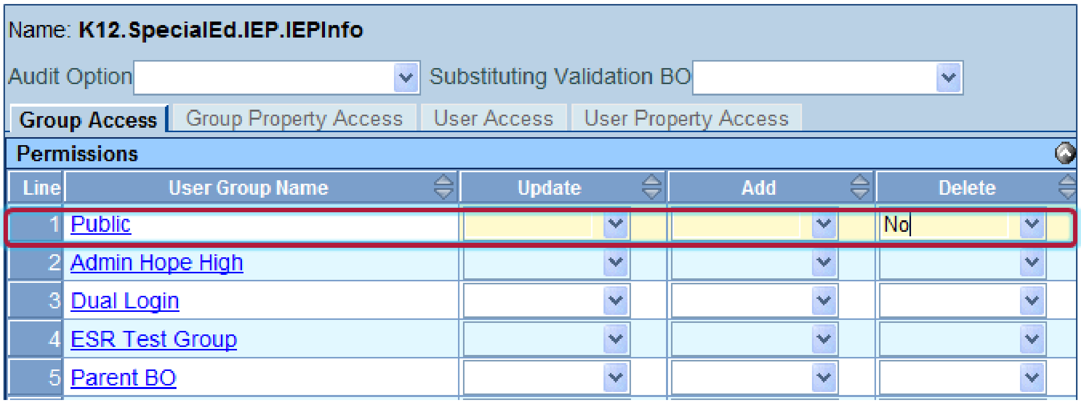


Figure 3-26 Security Definition Screen Group Access Tab

2. Under User Group Name column, select **Public**. The row by highlights.
3. Select **No** from the drop-down in the Delete Column.
4. Reassign the Delete access to **Yes** for specific user groups.
5. Click Save.

> **Note:** When taking away an access privilege for Public (All Groups) be sure to re-assign **Yes** access to the System Administrator Role..

Remove Delete *Button* from all Process Documents for Specific User Groups

1. Locate the Student Document in Security Definitions **K12>SpecialEd>Document>StudentDocument**.
1. Under User Group Name column, select **Public**. The row by highlights.
2. Select **No** from the drop-down in the Delete Column.
3. Reassign the Delete access to **Yes** for specific user groups.
4. Click Save.

Remove Delete *Column* from all Process Documents for Specific User Groups

1. Locate the DocumentGridProcess in Security Definitions **K12>SpecialEd>Document>DocumentGridProcess**.
2. In the DocumentGridProcess Security grid, select **Public**.
3. Select **No** from the drop-down in the Delete Column.
4. Reassign the Delete access to **Yes** for specific user groups.
5. Click Save.

PAD Security Screen

The PAD Security screen contains

- **Group Access Tab**

  Allows configuration of document tabs and buttons for User Groups.
- **User Access Tab**

  Allows configuration of document tabs and buttons for specific Users.

Navigate to the PAD Security Screen

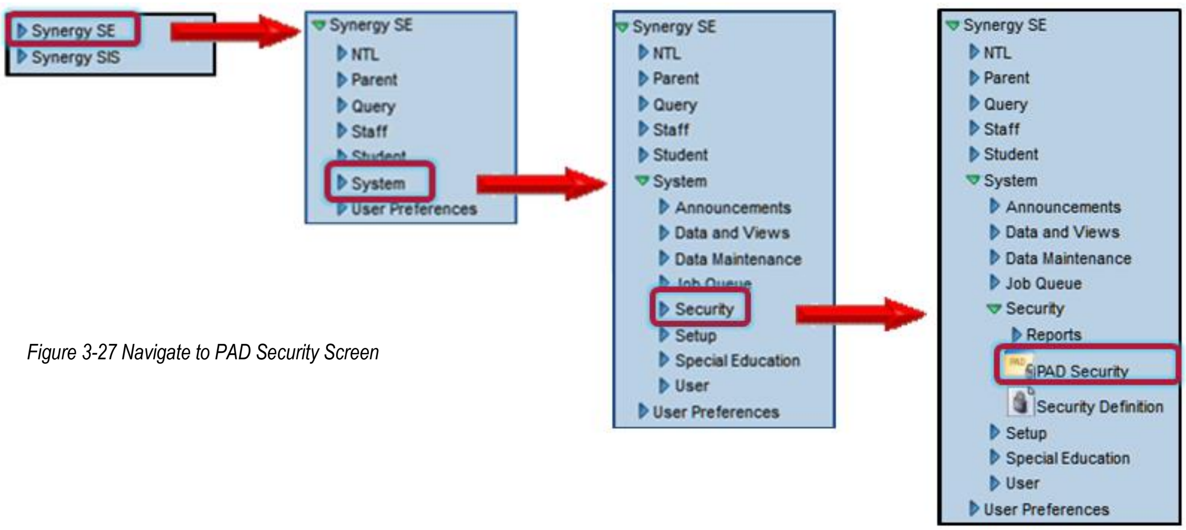


Figure 3-27 Navigate to PAD Security Screen

Buttons

Validate, Finalize and Print Preview Buttons

1. From the PAD Security screen, expand the **Synergy SE** folder by clicking on the pointing next to the word. Once clicked, the triangle will turn green and point downward.
2. Click the next to the word **Non PAD** to display the Documents folder.
3. Click the next to the word **Documents** to display the Synergy SE Documents.
4. Select the Document from the list by clicking on the **Document name**. The security grid for the document will display on the right.

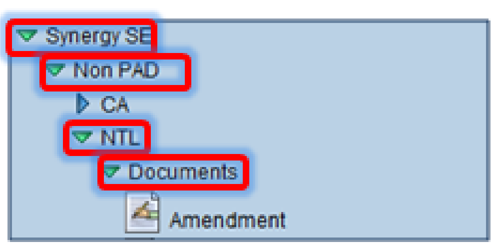


Figure 3-28 PAD Security Screen

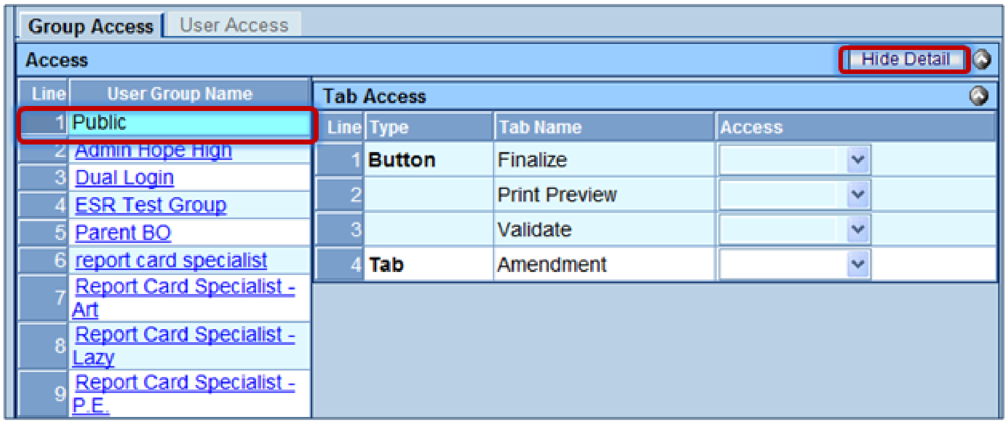


Figure 3-29 PAD Security Screen Group Access Tab

5. Select the **User Group Name** by highlighting the row.
6. Click the **Show Detail button** to display the document properties.

   The Type column indicates the property such as Tab or Button.

   The Tab Name indicates the location of the property.

7. Click **Access** to determine access for the group by selecting **Yes** or **No**.
8. Click Save.

Refresh Buttons

1. Locate and click on a Refresh item (example: **Behavior Intervention Plan**)
2. Under User Group Name column, select **Public**. The row by highlights.
3. Click **Access** and select **No.**
4. Set **Individual Groups** to **Yes**. This will allow access to Refresh Referral data into the MET for that user group.
5. Click Save.

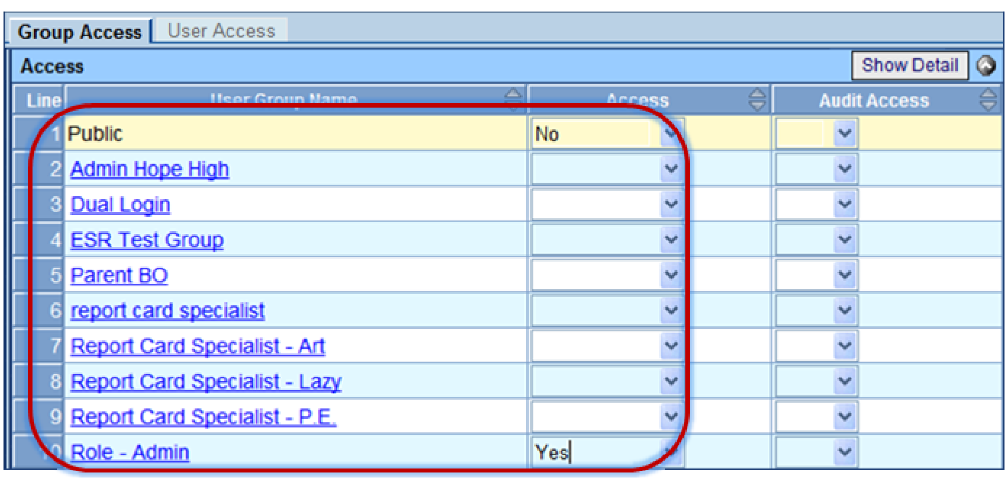


Figure 3-30 PAD Security Screen Group Access Tab

MANUAL PROCESS MOVE ACCESS

The Manual Process Move feature is located on the Student Screen Process Docs tab. This feature allows the user to move the student to any process within Synergy SE.

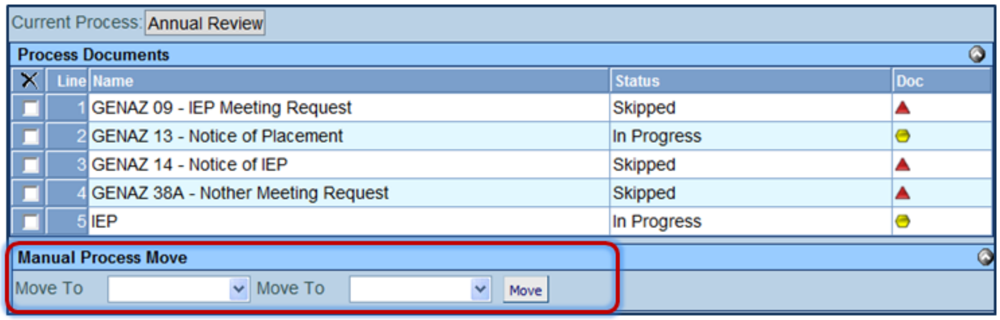


Figure 3-31 Student Screen Process Docs Tab Manual Process Move

The following steps will remove the Move To drop-down and Move button from specific User Groups.

REMOVE THE PROCESS MOVE DROP-DOWN FOR A SPECIFIC USER GROUP:

1. On the Security Definition screen, navigate to **K12>SpecialEd>AZ>StudentUI**
2. From the Security Grid, select the **Group Property Access** tab.
3. Under **User Group Name** column, select **Public.** The row by highlights.

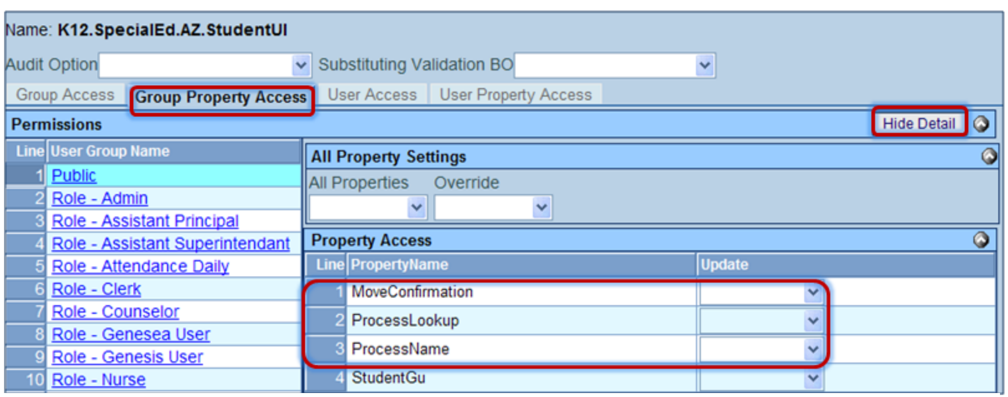


Figure 3-32 Security Definition Screen Group Property Access Tab

4. Click **Update** and select **None** for **MoveConfirmation**, **ProcessLookup**, and **ProcessName.**
5. Click Save. Access to Process Move has been removed from Public Groups.
6. Highlight specific **User Group Names** to give access back (example: System Admin).
7. Click Save.

REMOVE THE MOVE BUTTON

1. On the PAD Security screen, navigate to **Synergy SE>Student>Student**.
2. From the Security Grid, select the **Group Access** tab.
3. Under **User Group Name** column, select **Public.** The row by highlights.

4. Click **Access** on the **Move (Button)** line.
5. Select **No**.

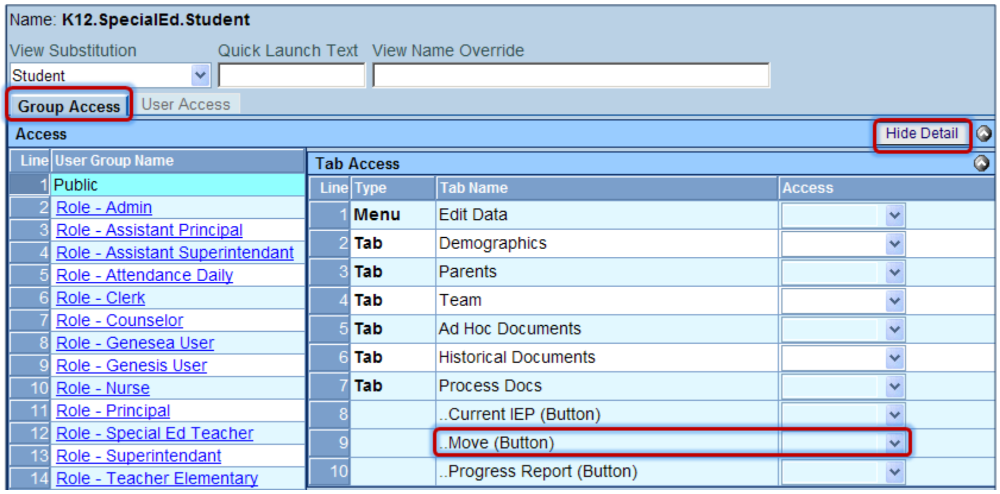


Figure 3-33 PAD Security Screen

6. Click Save .Access to the Move Button has been removed from Public Groups.
7. Highlight specific **User Group Names** to give access back (example: System Admin).

SECURITY FOR STUDENT DOCUMENT UNLOCK

Functionality can be secured from end users and/or added to other user groups, if desired, via Security Definition screen.

1. On the Security Definition screen, navigate to **Synergy SE>NTL>Student Document Unlock**.

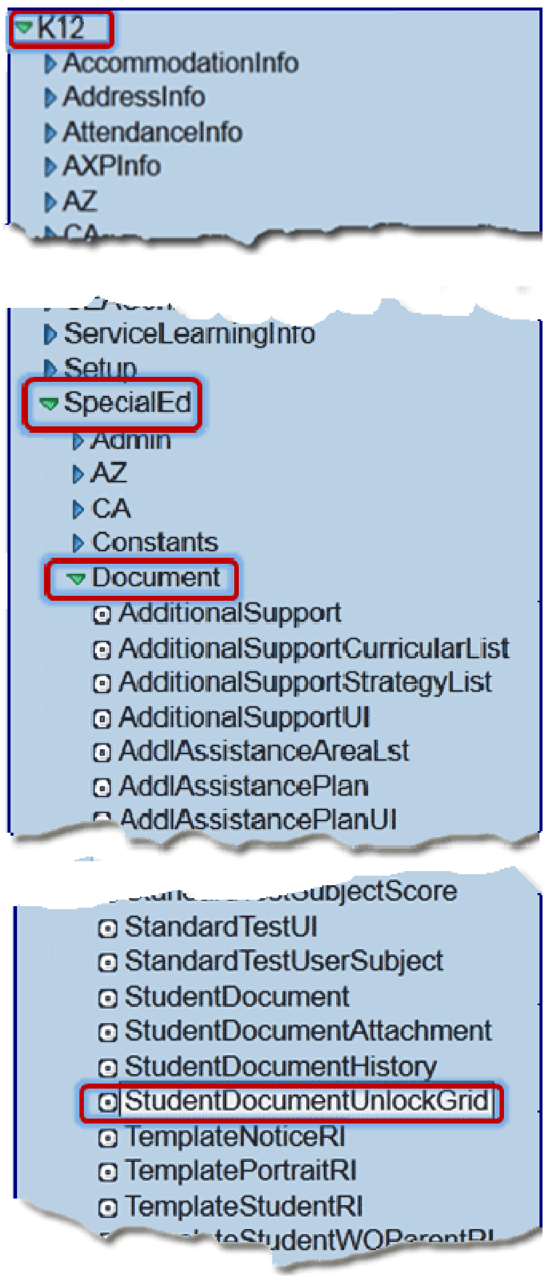


Figure 3-34Security Definition Screen

2. From the Security Grid, select the **Group Access** tab.
3. Under **User Group Name** column, select **Public.** The row by highlights.
4. Click **Access** and select **None.**

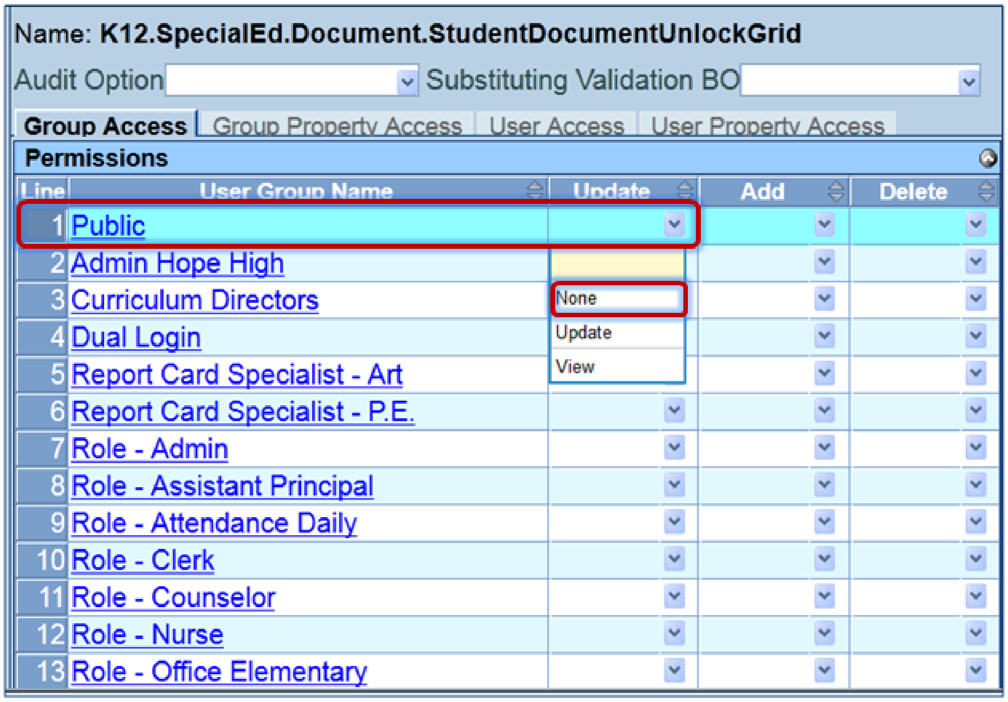


Figure 3-35 Security Definition Screen Group Access Tab

5. Set **Individual Groups** to **View** or **Update**. This will allow access to Student Document Unlock for specific user groups.
6. Click Save.

Chapter Four:
SYNERGY SE PROCESSES

In this chapter, the following topics are covered:

- ► Configuring Synergy SE Processes
- ► Adding and Removing Process Documents
- ► Configuring Synergy SE Processes
- ► Adding and Removing Process Documents

SYNERGY SE PROCESSES

Synergy SE contains six separate processes in which a student may reside in at any given time. Each process contains process documents that coincide with the basic steps of that process.

When the Synergy SE software application is set up at a school district, these processes and their corresponding documents are included.

Districts may customize Synergy SE with the ability to hide any process within the application (for example, the Preschool process), as well as add or hide a document within any process.

The six processes included in Synergy SE are: **Initial Evaluation, Annual Review, Reevaluation, Transfer, Preschool,** and **504.**

INITIAL EVALUATION PROCESS DOCUMENTS	
❖	GENAZ 01 – Referral
❖	GENAZ 02 – Notice of Referral
❖	GENAZ 03 – Parent Input
❖	GENAZ 04 – Notice of Evaluation Decision
❖	GENAZ 05 – Parent Permission
❖	GENAZ 06 – Multidisciplinary Evaluation Team (MET)
❖	Eligibility Document List
❖	GENAZ 07 – MET Meeting Request
❖	GENAZ 08 – Notice of Eligibility
❖	GENAZ 09 – IEP Meeting Request
❖	GENAZ 10 – Notice of Placement
❖	GENAZ 11 – Notice of IEP
❖	GENAZ 12 – IEP

Table 1 Initial Evaluation Process Documents

Reevaluation Process Documents
❖ GENAZ 01 – Referral
❖ GENAZ 15 – Reevaluation Waiver
❖ GENAZ 16 – Notice of Referral
❖ GENAZ 03 – Parent Input
❖ GENAZ 17 - Notice of Reevaluation Decision
❖ GENAZ 18 – Notice of Triennial
❖ GENAZ 19 – Notice of Test Intent
❖ GENAZ 05 – Parent Permission
❖ GENAZ 06 – Multidisciplinary Evaluation Team (MET)
❖ Eligibility Document List
❖ GENAZ 07 – MET Meeting Request
❖ GENAZ 08 – Notice of Eligibility
❖ GENAZ 20 – Notice of Termination
❖ GENAZ 09 – IEP Meeting Request
❖ GENAZ 21 – Notice of Continued Placement
❖ GENAZ 22 – Notice of IEP
❖ GENAZ 12 - IEP

Table 2 Reevaluatioon Process Documents

Annual Review Process Documents
❖ GENAZ 09 – IEP Meeting Request
❖ GENAZ 13 – Notice of Placement
❖ GENAZ 14 – Notice of IEP
❖ GENAZ 12 - IEP

Table 3 Annual Review Process Documents

Transfer Process Documents
❖ GENAZ 09 – IEP Meeting Request
❖ GENAZ 23 – Notice Transfer
❖ GENAZ 24 – Transfer Process

Table 4 Transfer Process Documents

PRESCHOOL PROCESS DOCUMENTS	
❖	GENAZ 25 – Notice of Referral
❖	GENAZ 03 – Parent Input
❖	GENAZ 26 – Notice of Evaluation Decision
❖	GENAZ 05 – Parent Permission
❖	Eligibility Document List
❖	GENAZ 06 – Multidisciplinary Evaluation Team (MET)
❖	GENAZ 07 – MET Meeting Request
❖	GENAZ 08 – Notice of Eligibility
❖	GENAZ 09 – IEP Meeting Request
❖	GENAZ 27 – Notice of Placement
❖	GENAZ 28 – Notice of IEP
❖	GENAZ 12 – IEP

Table 5 Preschool Process Documents

504 ANNUAL PROCESS DOCUMENTS	
❖	GENAZ 504– Notice of Section 504 Eligibility Form
❖	GENAZ 504 EEOP - Section 504 Equal Education Opportunity Plan

Table 6 504 Annual Process Documents

NAVIGATE TO THE PROCESS SETUP SCREEN

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

Figure 4-1 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▷ pointing next to the word. Once clicked, the triangle will turn green ▼ and point downward.
3. Under the Synergy SE folder, click on the name **System** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.
4. Click on the name **Setup** or ▷ pointing right next to it. The triangle will turn green ▼ and point downward.
5. Click on the name **Process Setup.** The Process Setup screen displays.

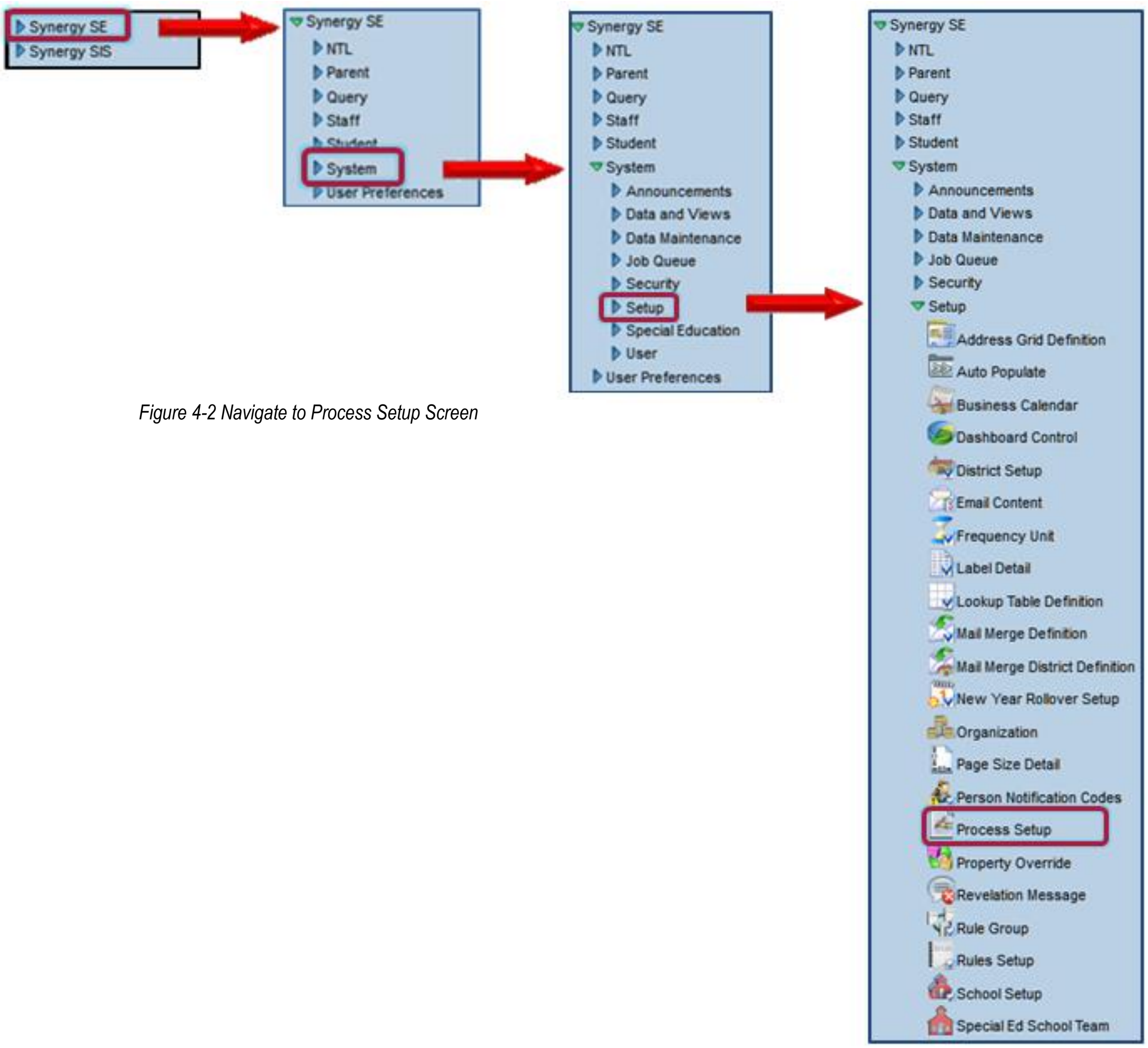


Figure 4-2 Navigate to Process Setup Screen

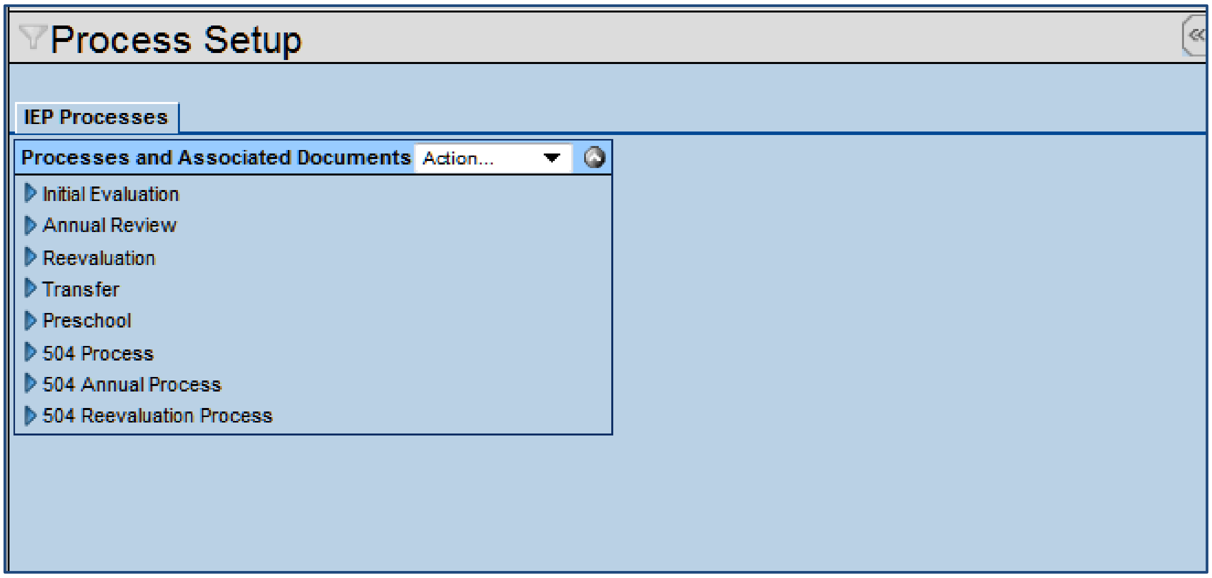


Figure 4-3 Process Setup Screen

Edit a Process

1. To open an existing process for editing, click on the blue triangle next to the specific process. Once clicked, the triangle will turn green and point downward. All documents that are displayed in that process will appear.

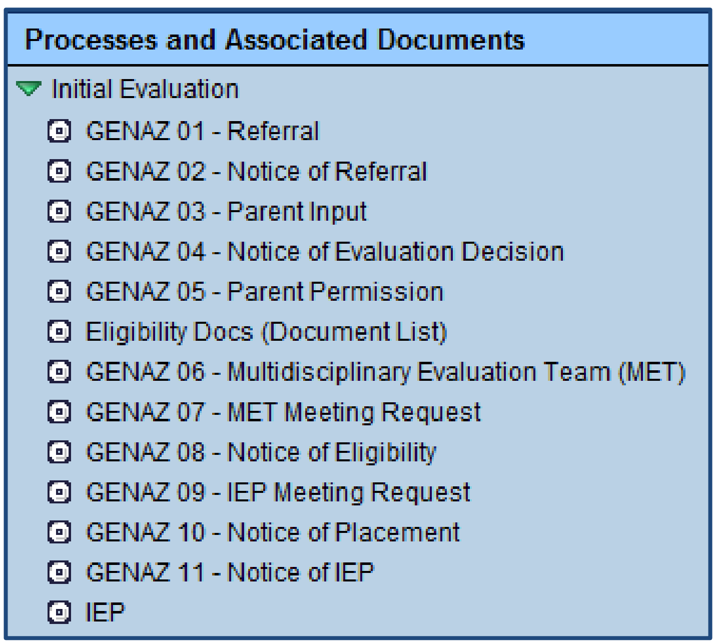


Figure 4-4 Processes and Associated Documents

2. To edit components within a process, click on the name of the process. The process name highlights and the detail screen displays on right.

Each process allows for configuration by individual districts.

1. Current Process highlighted.
2. The **Action** drop-down provides an option to hide the process from user view or add a new document to the process.
3. The **Process Name** and **View Order** area allows districts to change the name of the process and move the view order the process appears in the Portfolio screen.

4. The **Next Process Options** provides an option to either have the system prompt the user for the next process when an IEP is finalized. The **Suggested Next Process** will move the student to that process when the IEP is finalized.
5. The **IEP Options** will display details regarding the IEP screen in the Portfolio.
6. **Process Documents** list all documents that display under that process and provide the district the ability to hide documents, add new documents and label the documents. View order can also be changed on this screen.

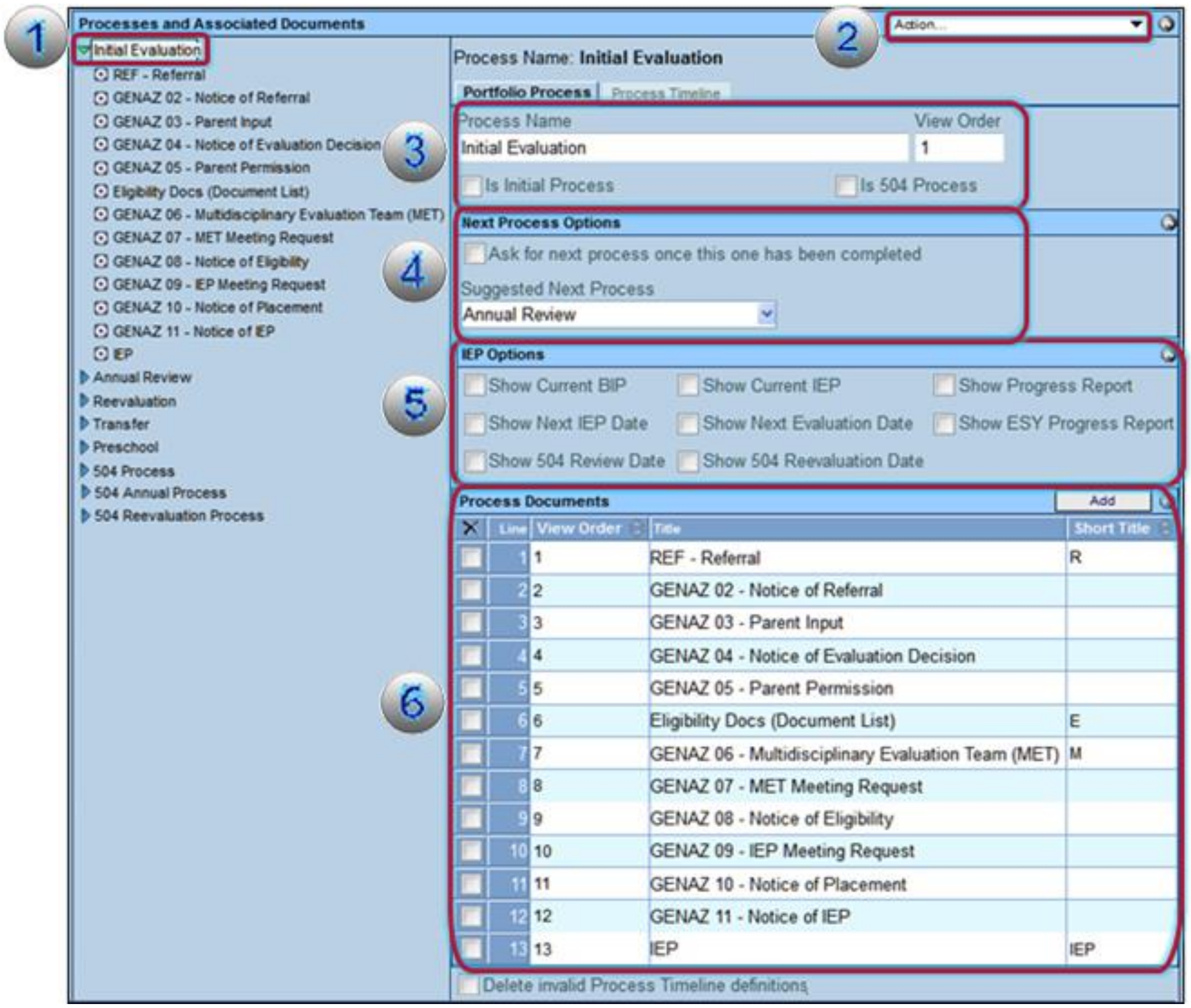


Figure 4-5 Process Setup Screen Detailed View

DELETE PROCESS FROM PORTFOLIO SCREEN

1. Click **Action ...** .

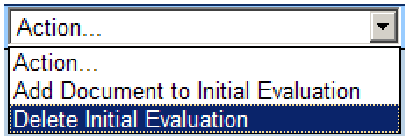


Figure 4-6 Process Delete Option

2. Select **Delete "Process" Evaluation.**

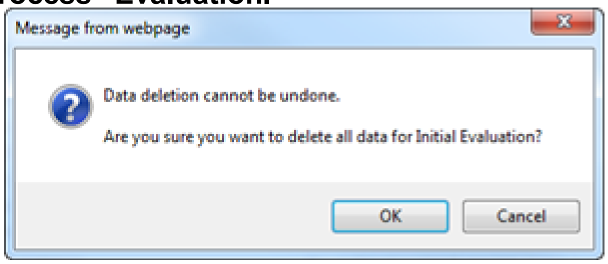


Figure 4-7 Confirmation Screen

3. Click **OK.**

ADD DOCUMENT TO PROCESS

1. Click on the **Action....** .

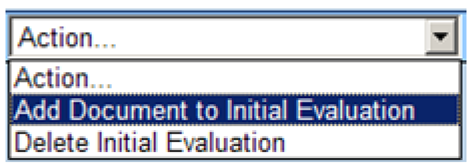


Figure 4-8 Add Document to Process

2. Select **Add Document to "Process" Evaluation**. The Process Document window opens.
3. Click **Document Definition** to select the desired document. The name of the elected document displays in the **Document Definition** field.
4. Enter the **View Order** number to have the document placed in the desired order.

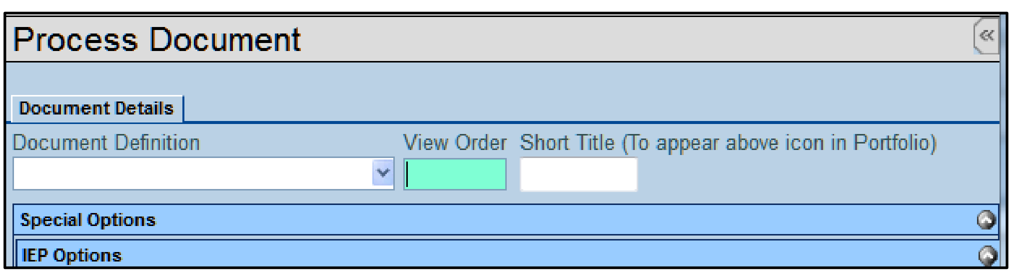


Figure 4-9 Process Document Add Screen

5. Enter a **Short Title** (optional) to have a title appear directly above the documents icon.

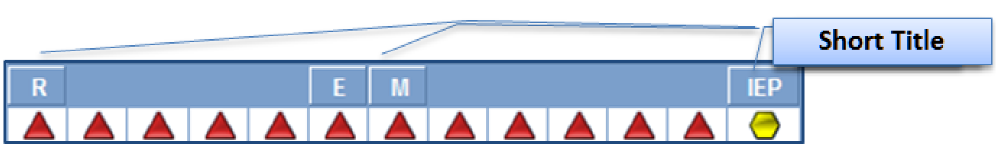


Figure 4-10 Short Title Portfolio Screen

6. Selecting specific checkboxes in the IEP Options checkbox will add additional information or icons to the Portfolio screen.

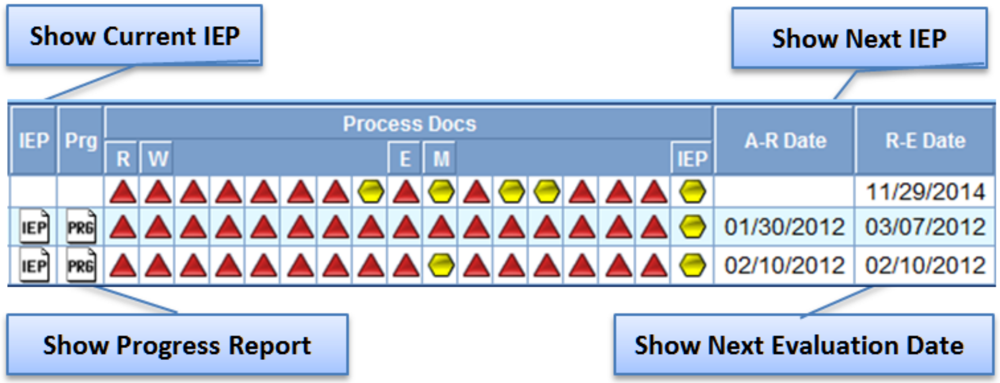


Figure 4-11 Portfolio Display Options

7. Click Save when finished. The screen closes and the new document displays in the list.

Edit Process Documents from Process Documents Grid

☒	Line	View Order	Title	Short Title
☐	1	1	GENAZ 01 - Referral	R
☐	2	2	GENAZ 02 - Notice of Referral	
☐	3	3	GENAZ 03 - Parent Input	
☐	4	4	GENAZ 04 - Notice of Evaluation Decision	
☐	5	5	GENAZ 05 - Parent Permission	
☐	6	6	GENAZ 06 - Multidisciplinary Evaluation Team (MET)	M
☐	7	7	Eligibility Docs (Document List)	E
☐	8	8	GENAZ 07 - MET Meeting Request	
☐	9	9	GENAZ 08 - Notice of Eligibility	
☐	10	10	GENAZ 09 - IEP Meeting Request	
☐	11	11	GENAZ 10 - Notice of Placement	
☐	12	12	GENAZ 11 - Notice of IEP	
☐	13	13	IEP	IEP

Figure 4-12 Process Setup Screen Process Documents Grid

1. Check ☒ on line of the document to remove it from the Process Screen.
2. Click Save.
3. Change the **View Order,** if desired.
4. Click Save.
5. Add or edit a **Short Title**
6. Click Save.
7. Click Add on the Process Documents bar to add a new document. See Add a Document to a Process above.

Document Details

Document Details can be accessed by clicking on an individual document under the process folder.

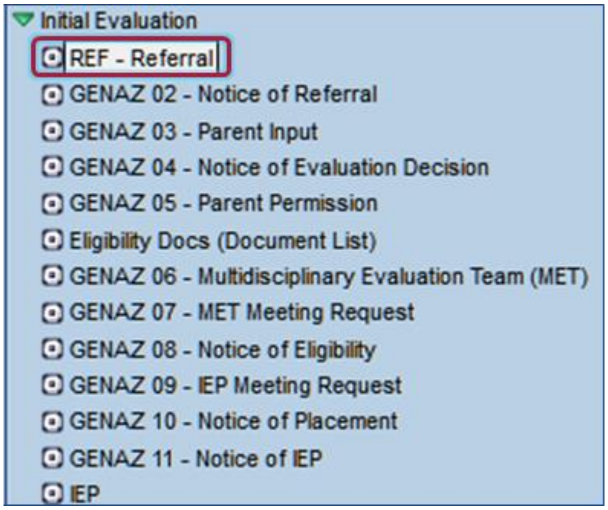


Figure 4-13 Process Setup Screen Process Folder

The same options are available for each individual document through Document Detail as through the Process Documents screen except for the IEP. The IEP Document Detail will need to be set for each instance of the IEP in each process.

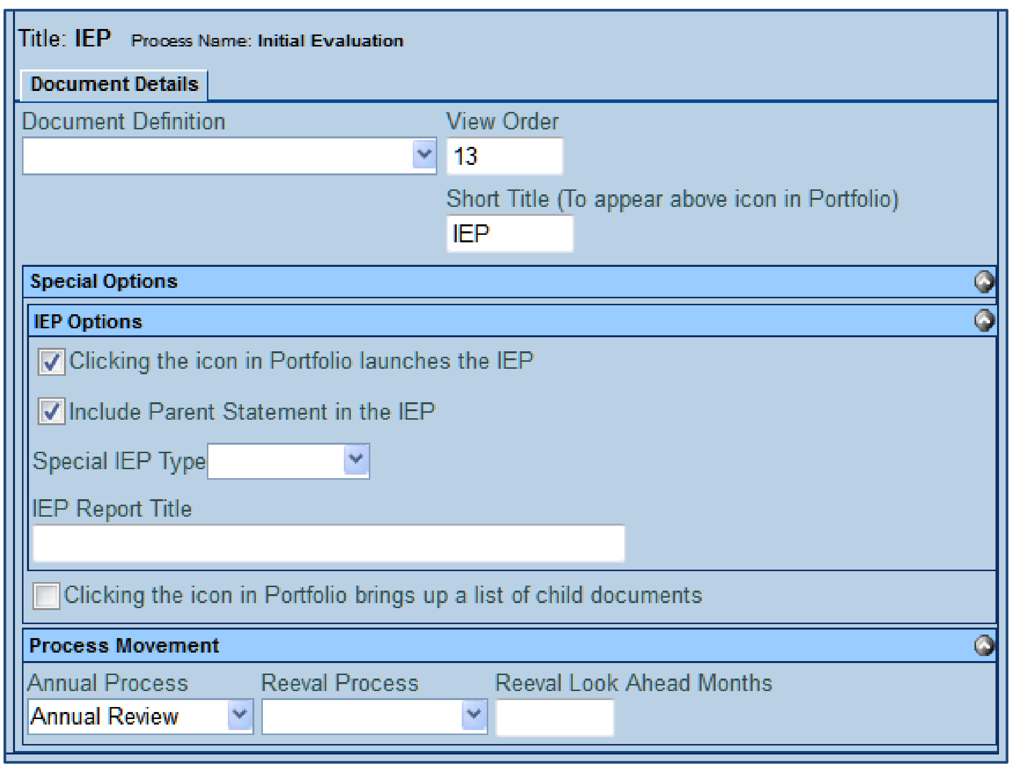


Figure 4-14 Process Setup Screen Document Details

1. Click on **IEP** from one of the Process folders to view the Document Detail for the IEP. The Document Detail screen opens for the IEP.
2. **Clicking the icon in Portfolio launches the IEP** checkbox should be checked. This will make sure the IEP opens upon clicking the IEP icon.
3. **If the Include Parent Statement in the IEP** is checked, the Parent Statement signature area will be included in the IEP.

The Process Movement options allow districts to determine process movement of the student after the IEP is finalized. More detail on Process Movement is covered in the *Synergy SE User Guide.*

The IEP in Initial Process is set up so that the student will move to the Annual Review Process once the IEP is finalized.

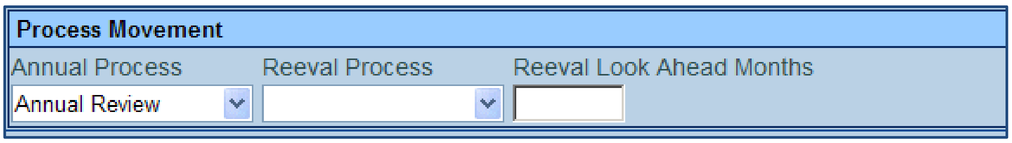


Figure 4-15 Process Setup ScreenDocument Details IEP Process Movement Initial

The IEP in Annual Review Process is set up so that the student will remain in Annual Review Process unless the Reevaluation is due within 6 months or less when the IEP is finalized.

Figure 4-16 Process Setup ScreenDocument Details IEP Process Movement Annual Review

The IEP in Reevaluation Process is set so that the student will always move to the Annual Review Process once the IEP is finalized.

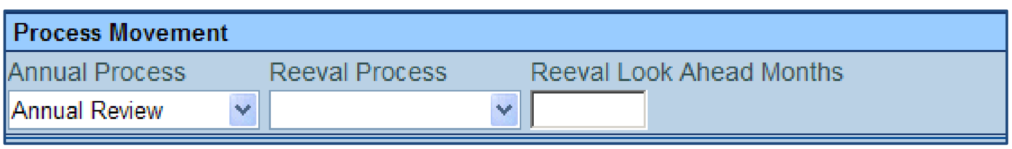


Figure 4-17 Process Setup ScreenDocument Details IEP Process Movement Reevaluation

The IEP in Preschool Process is set so that the student will always move to the Annual Review Process once the IEP is finalized.

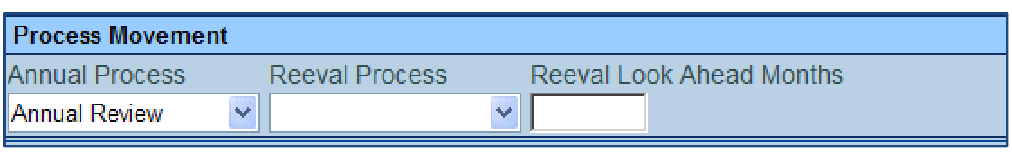


Figure 4-18 Process Setup ScreenDocument Details IEP Process Movement Preschool

Individual documents can also be set up as a “trigger” document that, upon finalizing, will move the student to another process. An example of this is the Notice of Reevaluation Waiver (GENAZ 15) located in the Reevaluation Process.

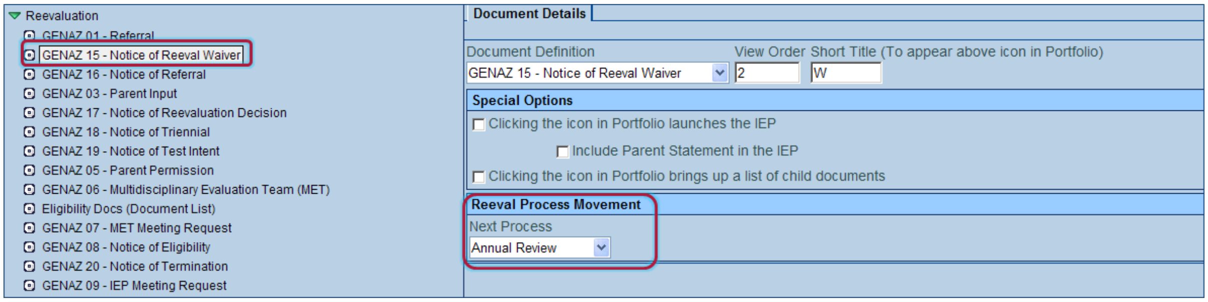


Figure 4-19 Process Setup ScreenDocument Details Document Process Movement

The Next Process drop-down has been set to Annual Review. Upon finalizing the Notice of Reevaluation Waiver, the student moves to the Annual Review Process. All finalized documents including the Waiver will be moved

Chapter Five:
DOCUMENT CONFIGURATION

In this chapter, the following topics are covered:

- ► Auto Populate and Document Definition
- ► Special Ed Service
- ► Student Document Unlock
- ► Look Up Table Definition
- ► Translation

USE AND CONSTRUCTION OF AUTO POPULATE AND DOCUMENT DEFINITION

Many critical documents can be can be configured by individual districts using the Auto Populate and Document Definition screens.

NAVIGATE TO THE AUTO POPULATE SCREEN

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

Figure 5-1 Synergy Tree Button

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Click on the name **Setup** or pointing right next to it. The triangle will turn green and point downward.
5. Click on the name **Auto Populate .** The Auto Populate screen displays.

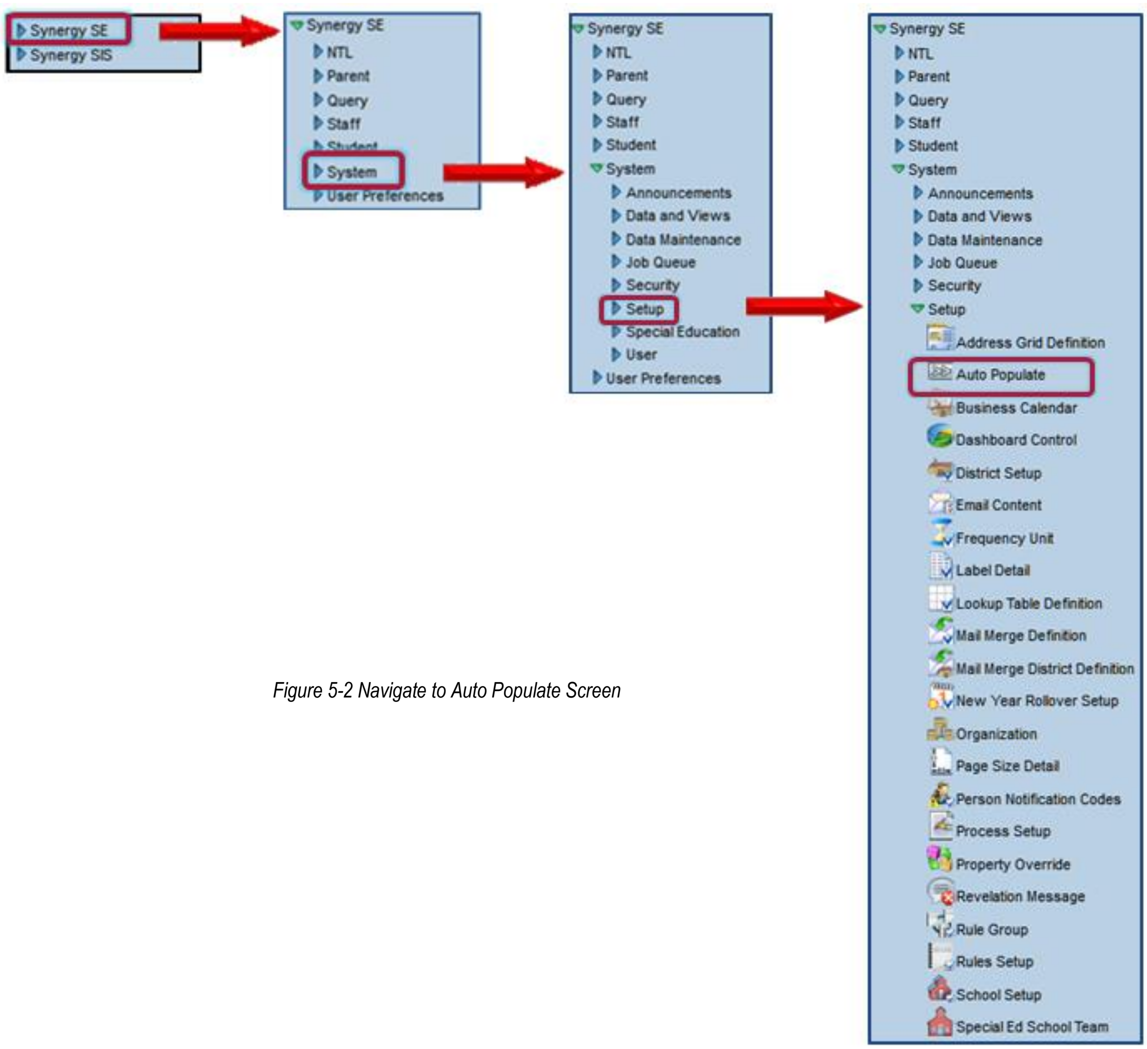


Figure 5-2 Navigate to Auto Populate Screen

Figure 5-3 Auto Populate Screen

NAVIGATE TO THE DOCUMENT DEFINITION SCREEN

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

Figure 5-4 Synergy Tree Button

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **Special Education** or pointing right next to it. The triangle will turn green and point downward
5. Click on the name **Document Definition.** The Document Definition screen opens.

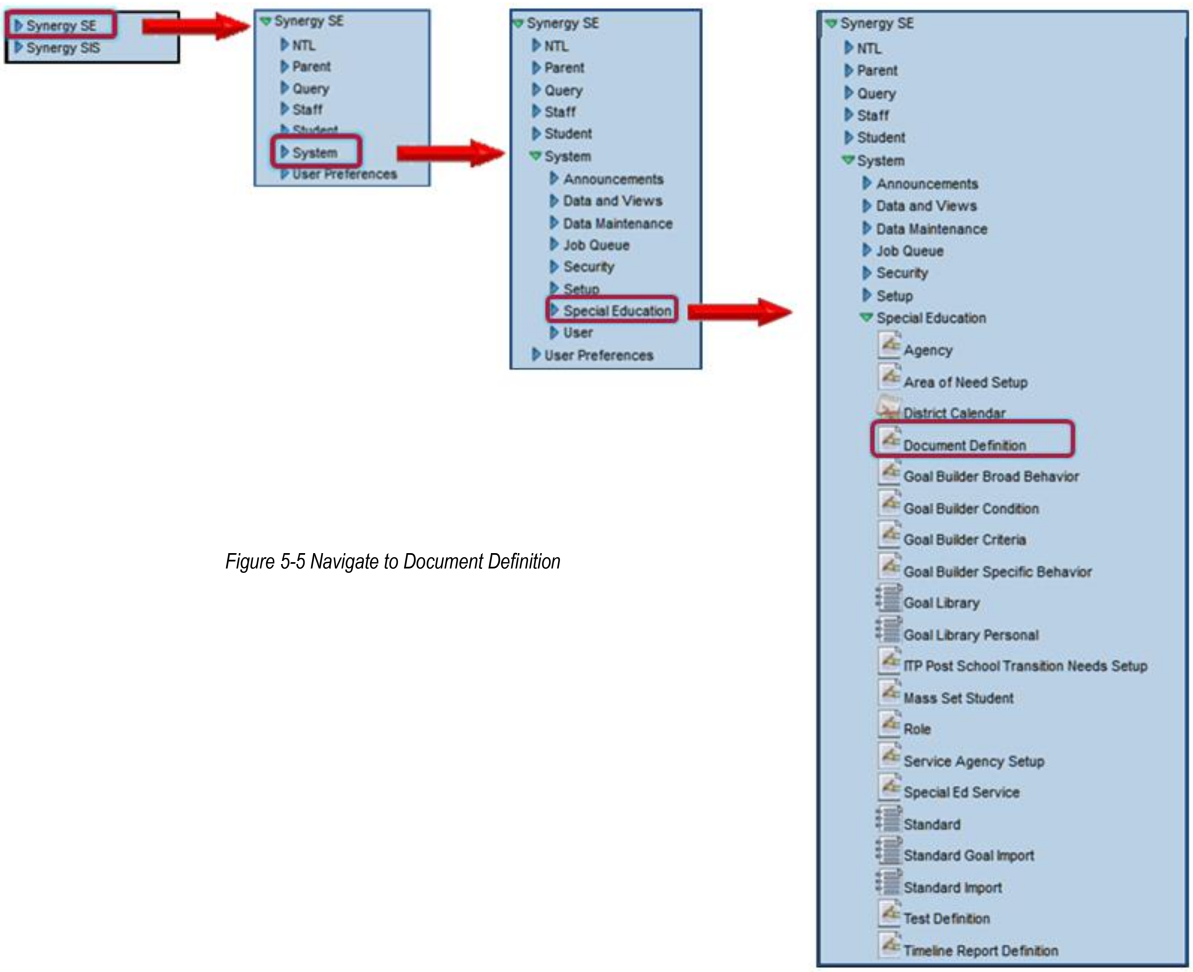


Figure 5-5 Navigate to Document Definition

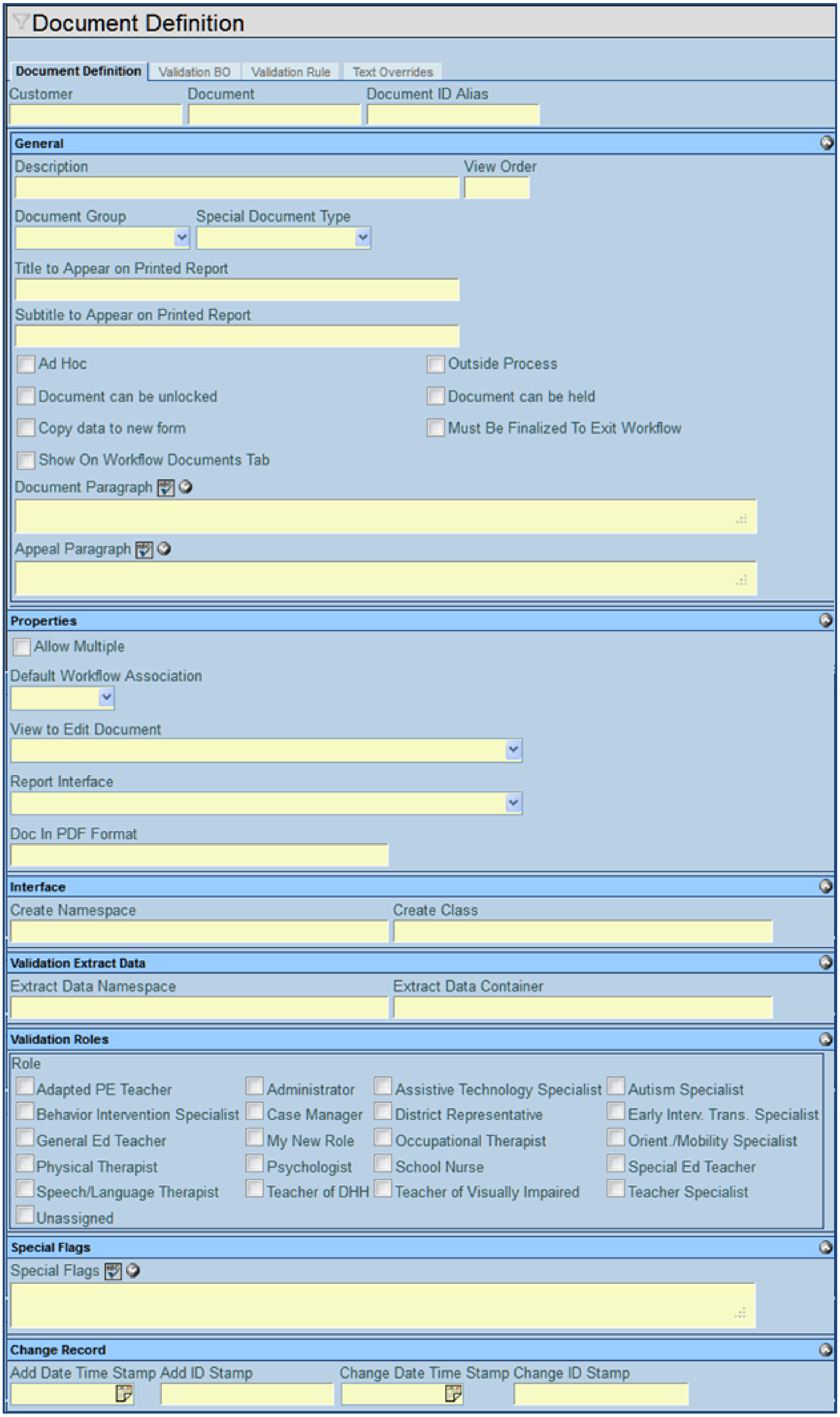


Figure 5-6 Document Definition Screen

Functional Behavior Assessment Plan (FBA)

The FBA is located in the Ad Hoc Docs folder for each student. The FBA contains several drop-down libraries on the Specifics tab. The library statements can be maintained by individual districts. Statements can be edited, removed or added.

1. To locate the correct Auto Populate library, open an **FBA** document in Ad Hoc Docs. Navigate to the **Specifics** tab.

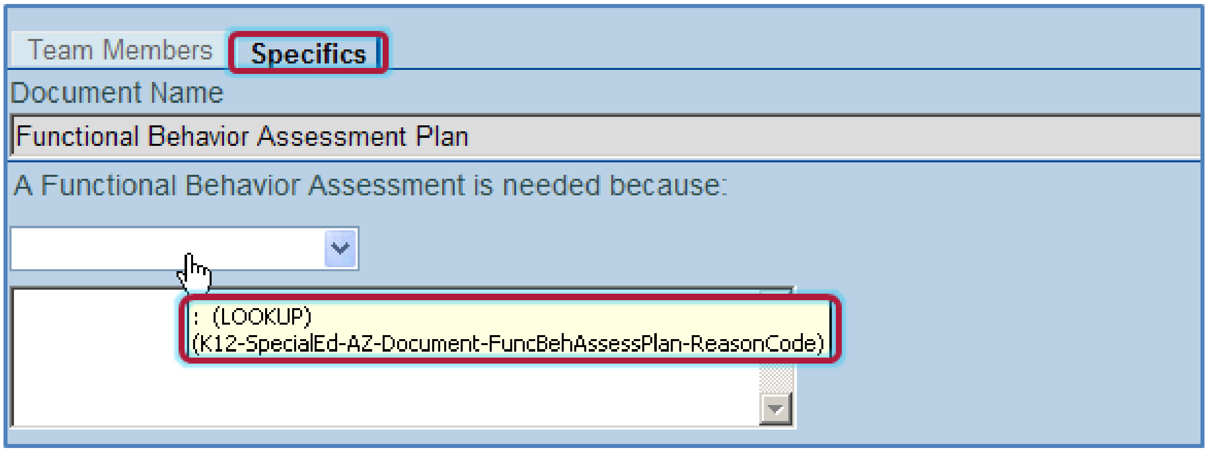


Figure 5-7 FBA Screen Specifics Tab

2. Hover the mouse over the drop-down list. A box pops up with the name of the table. This functionality is referred to as *show BO on mouseover.* See: User Special Ed Settings.
3. Navigate to the **Auto Populate** screen.

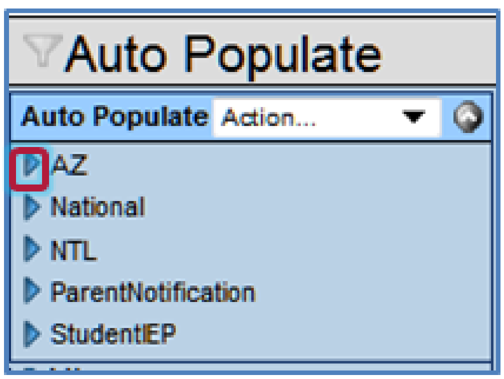


Figure 5-8 Auto Populate Screen

4. Click on next to **AZ** to expand.

5. Click on next to **FBA** to expand.

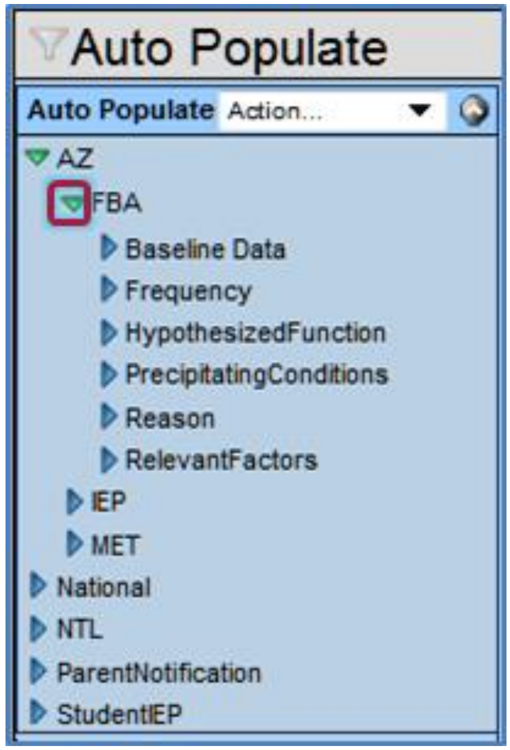


Figure 5-9 Auto Populate Screen

6. Click on the name **Reason**. It will highlight and open its Auto Populate library statements. From this screen, the statements can be removed or edited. New statements can also be added.

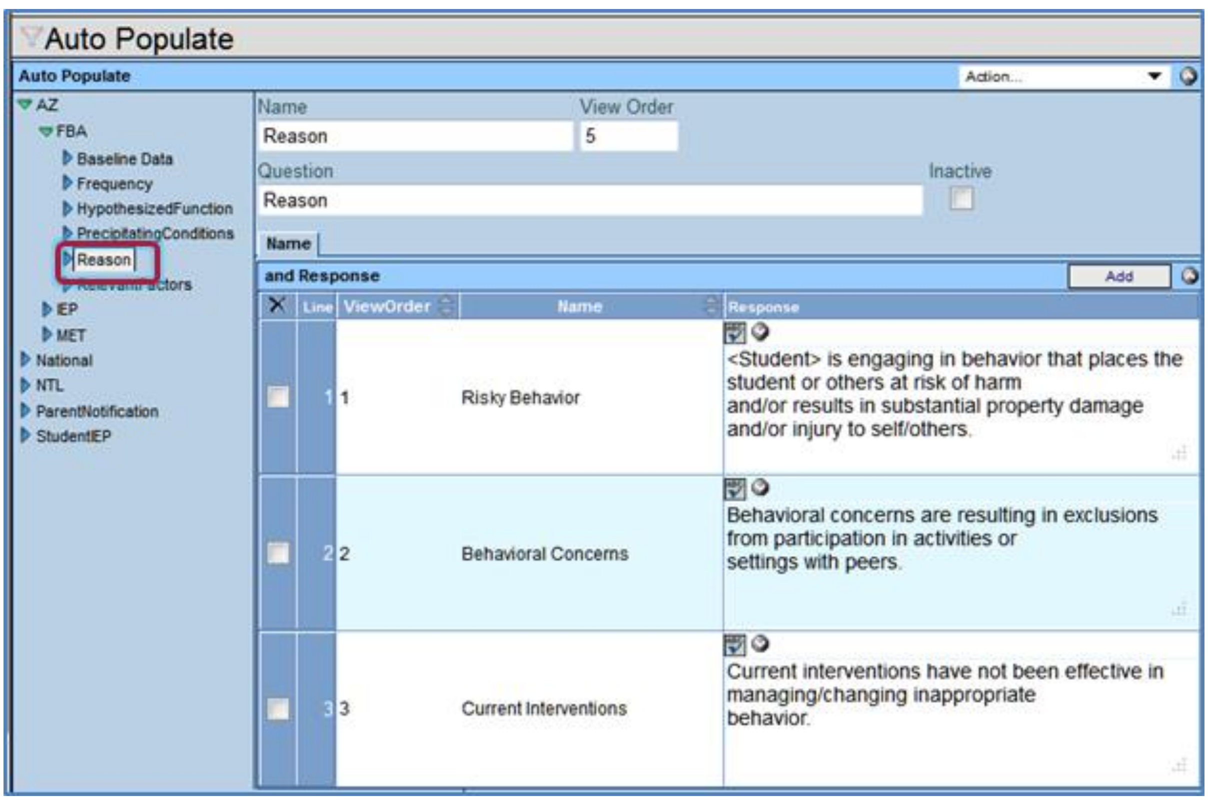


Figure 5-10 Auto Populate Screen Reason Grid

Add New Auto Populate Statement

1. Click Add on the **and Response** bar. A new row displays at the bottom of list.
2. Enter the **View Order.**

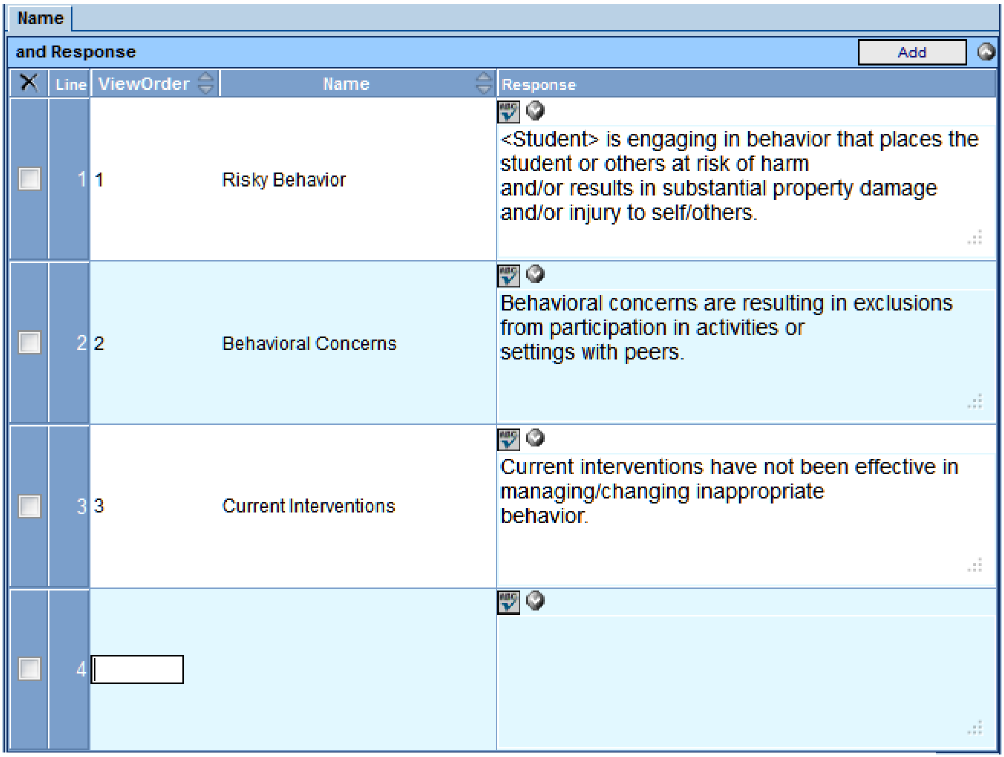


Figure 5-11 Auto Populate FBA Response Grid

3. Enter the **Name** of the statement. This is what the user will see from the drop-down list.
4. Enter the **Response** statement. This is what will populate in the text box.
5. Click Save.

Edit Existing Auto Populate Statement

1. Edit the numbers in the **ViewOrder** column to reflect the desired order of the statements.
2. Check on the line of a statement to delete, if desired.
3. Edit the **Name** of the statement. These are the key words that the user sees in the drop-down. Once selected the entire statement (Response) displays in the textbox.
4. Edit the Response statement. If desired, the student name will populate in the textbox if **<Student>** is typed into the statement. For example: *"<Student> is engaging in behavior…"* will appear in the document as *"Harry is engaging in behavior…"* for a student named Harry.
5. Click Save when finished.

Individualized Education Plan (IEP)

Library Statements

The IEP is located in the Process Documents for each student (depending on the current process the student is in). The IEP document contains several drop-down libraries. The library statements can be maintained by individual districts. Statements can be edited, removed or added.

1. To locate the correct Auto Populate library, open an **IEP** document in the student's Process Docs tab.
2. Locate the textbox in question.
3. Hover the mouse over the drop-down list. A box pops up with the name of the table. This functionality is referred to as *show BO on mouseover.* See: User Special Ed Settings.

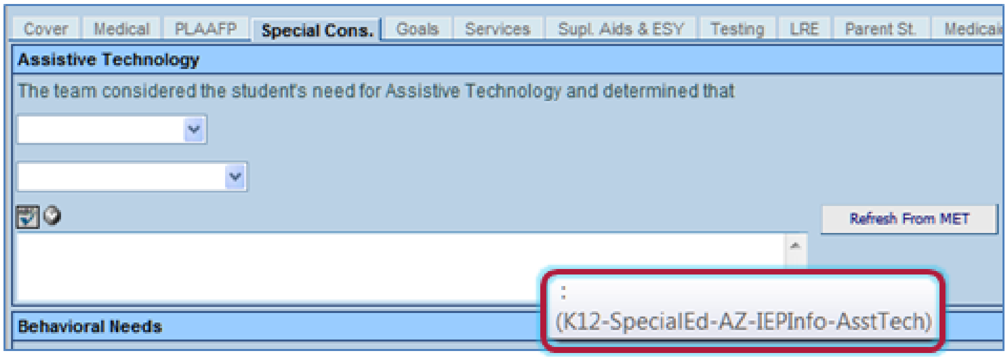


Figure 5-12 IEP Screen Special Cons.Tab

4. Navigate to the **Auto Populate** screen.

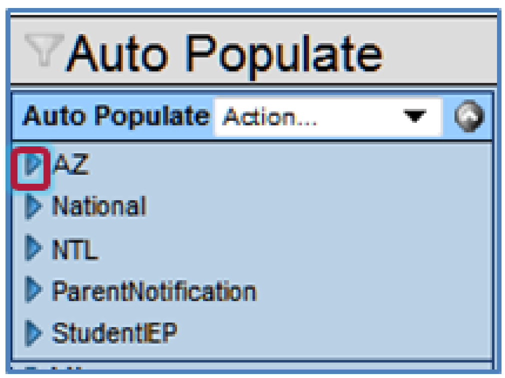


Figure 5-13 Auto Populate Screen

5. Click on next to **AZ** to expand.
6. Click on next to **IEP** to expand.

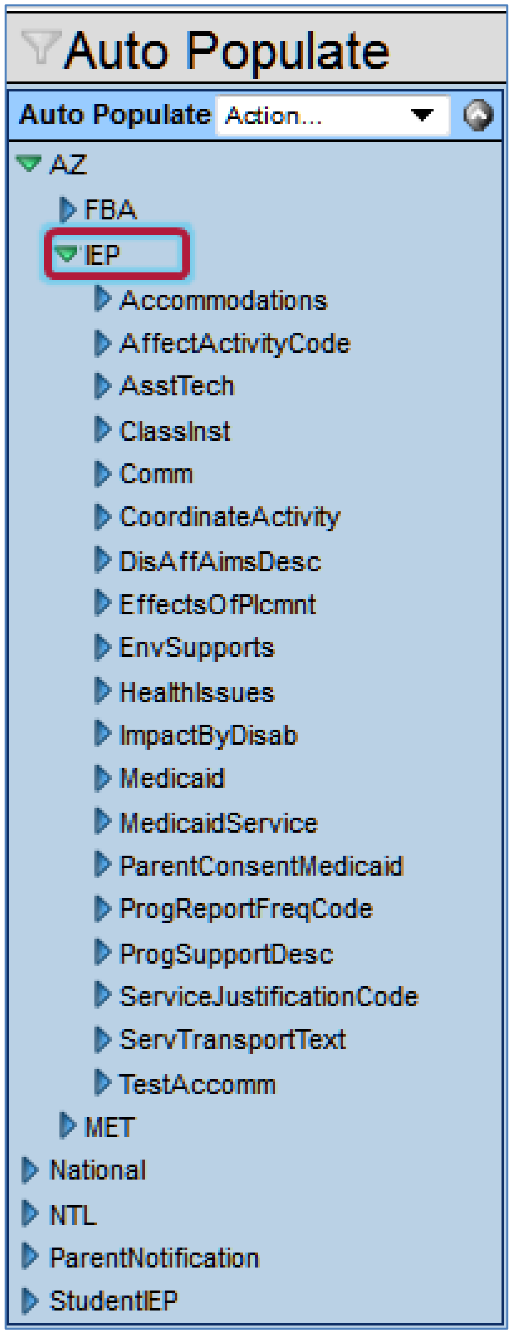
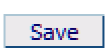


Figure 5-14 Auto Populate Screen

7. Click on the name of the specific **Auto Populate Library** to highlight and open its Auto Populate library statements. In this example, the BO told us the library was AsstTech.
8. From this screen, the statements can be removed or edited. New statements can also be added.
9. Click 

 when finished.

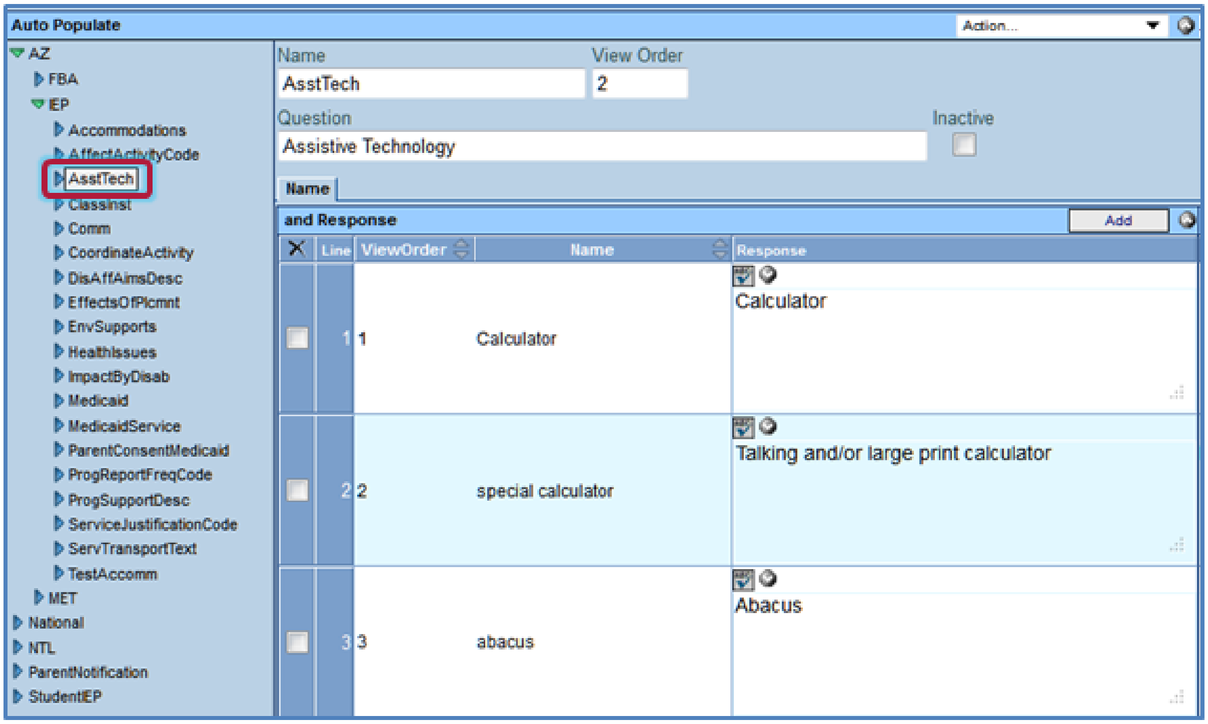


Figure 5-15 Auto Populate Screen AsstTech Response Grid

Add New Auto Populate Statement

1. Click Add on the **and Response** bar. A new row displays at the bottom of list.

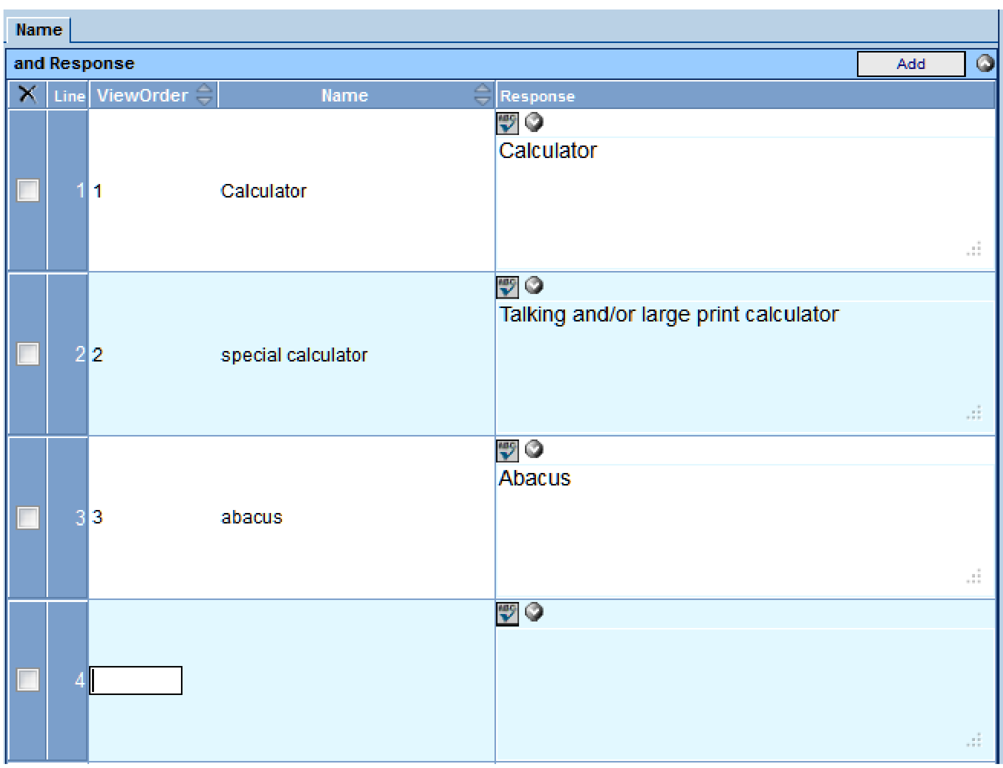


Figure 5-16 Auto Populate Screen AsstTech Response Grid New Line

2. Enter the **View Order.**
3. Enter the **Name** of the statement. This is what the user will see from the drop-down list.
4. Enter the **Response** statement. This is what will populate in the text box.

5. Click Save.
6. Edit Existing Auto Populate Statement
7. Edit the numbers in the ViewOrder column to reflect the desired order of the statements.
8. Check on the line of a statement to delete, if desired.
9. Edit the Name of the statement. These are the key words that the user sees in the drop-down. Once selected the entire statement (Response) displays in the textbox.
10. Edit the Response statement. If desired, the student name will populate in the textbox if <Student> is typed into the statement. For example: *"<Student> is engaging in behavior…"* will appear in the document as *"Harry is engaging in behavior…"* for a student named Harry.
11. Click Save when finished.

Library Statements with Sub-Categories

Some Auto Populate Libraries in the IEP will have additional categories embedded within the libraries. For example, on this screen, Medicaid Services has seven subcategories. Subcategories are helpful when many library statements exist for a library. Sets of statements can be divided into subcategories which assist the user in locating the statements.

The sub-categories display in folders underneath the main library statement.

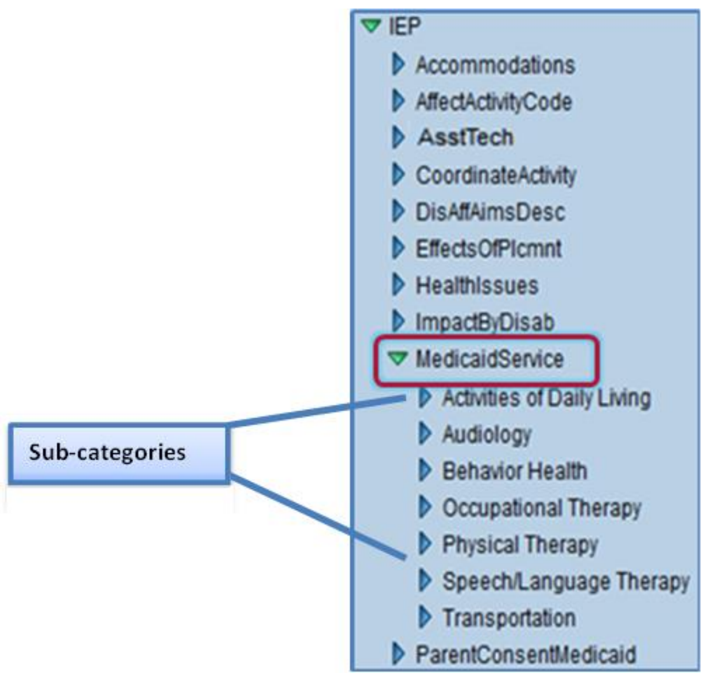


Figure 5-17 Auto Populate Screen

1. Click on next to the **category** to expand the sub-categories.
2. Click on the sub-category to open the statements.
3. Edit the statements as instructed above.
4. Click Save when finished.

IEP Parent Consent Statement

The ability to customize the Parent Consent Statement in the IEP is available.

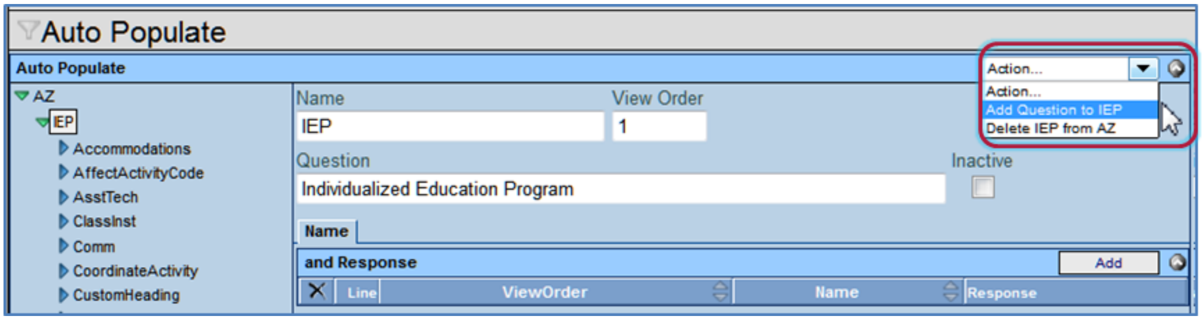


Figure 5-18 Auto Populate Screen Action Drop-down

1. Navigate to the **Auto Populate** screen.
2. Click on ▷ next to **NTL** or **AZ** to expand.
3. Click on **IEP.**
4. Click **Action ...** .
5. Select **Add Question** to node. The AutoPopulateGrid screen opens.
6. Name the new question ParentStatementCustomizations.
7. Click Save. The screen closes and the information is displayed.
8. Click Add.
9. Enter the **View Order.**

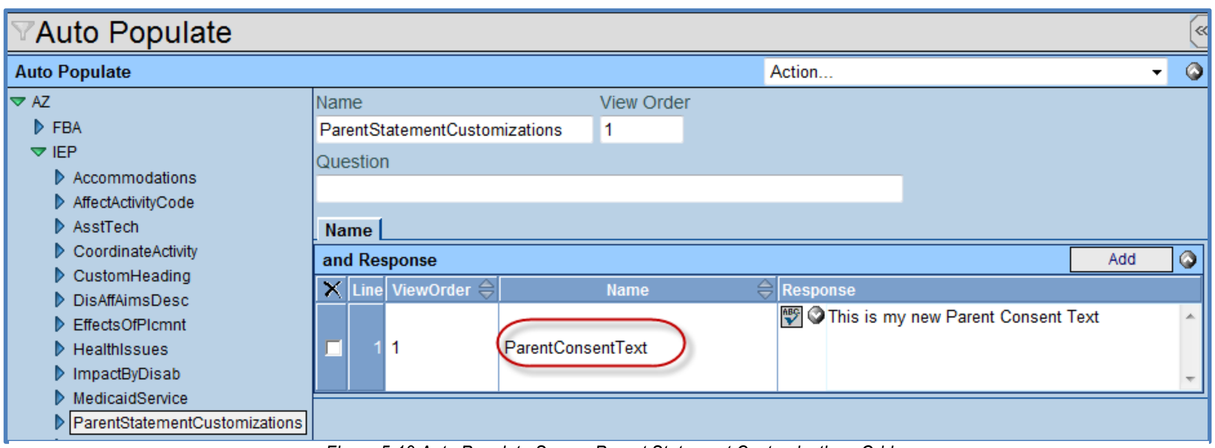


Figure 5-19 Auto Populate Screen Parent Statement Customizations Grid

10. Type **ParentConsentText** in the **Name** column.
11. Enter the desired text in the **Response** column.
12. Click Save.

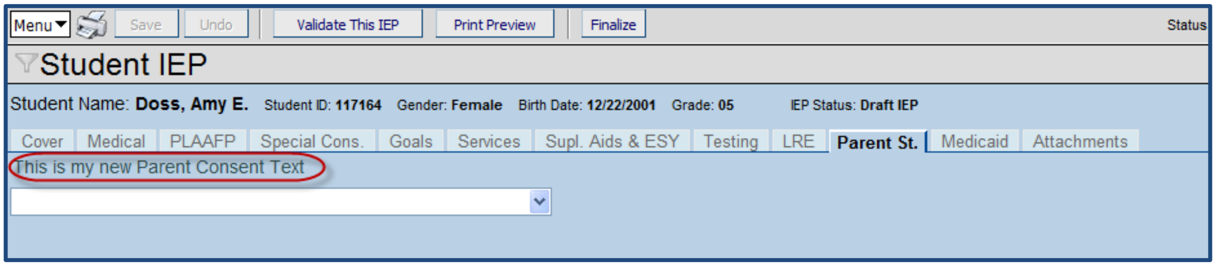


Figure 5-20 Student IEP Screen

Printable IEP from Auto Populate ParentStatementCustomizations

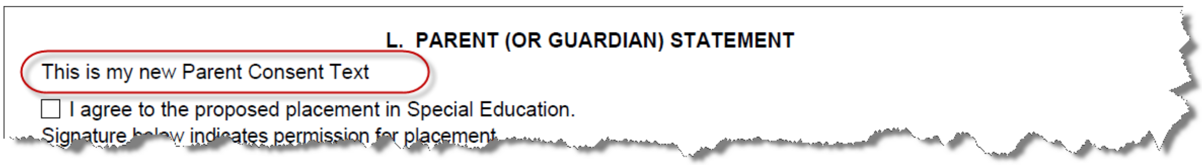


Figure 5-21 Printable Student IEP

Medicaid Tab ADL Statements

Detailed library statements can be added to Medicaid Assistance with Personal Care/Activities of Daily Living Services located on the IEP/Medicaid tab.

1. Navigate to the **Auto Populate** screen.
2. Click on ▷ next to **AZ** to expand.

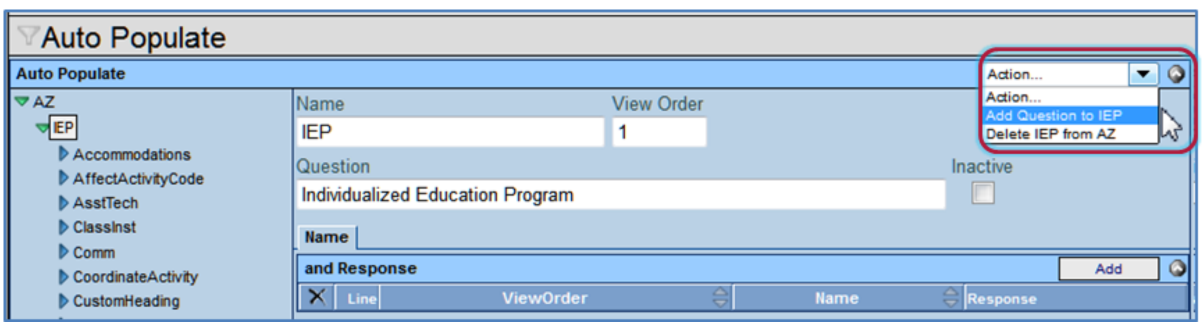


Figure 5-22 Auto Populate Screen IEP Response Grid

3. Click on **IEP.**
4. Select Add Question to IEP.
5. The AutoPopulateGrid screen opens.
6. Name the new question **Medicaid.**
7. Click Save. The screen closes and the information is displayed.

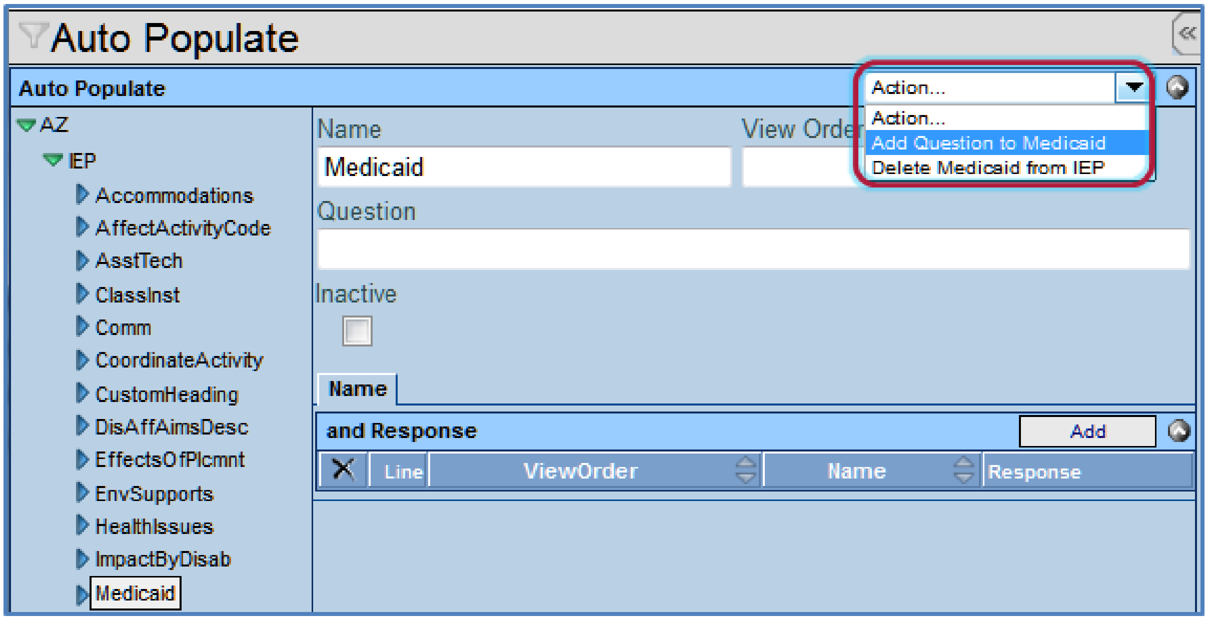


Figure 5-23 Auto Populate Screen Medicaid Response Grid

8. Add the following **Questions** to the Medicaid node by using the same procedure:
   - **Eating/Feeding**
   - **Grooming**
   - **Dressing**
   - **UseofAssistiveDevices**
   - **Mobility**
   - **Toileting**
   - **Transfers**
   - **Positioning**

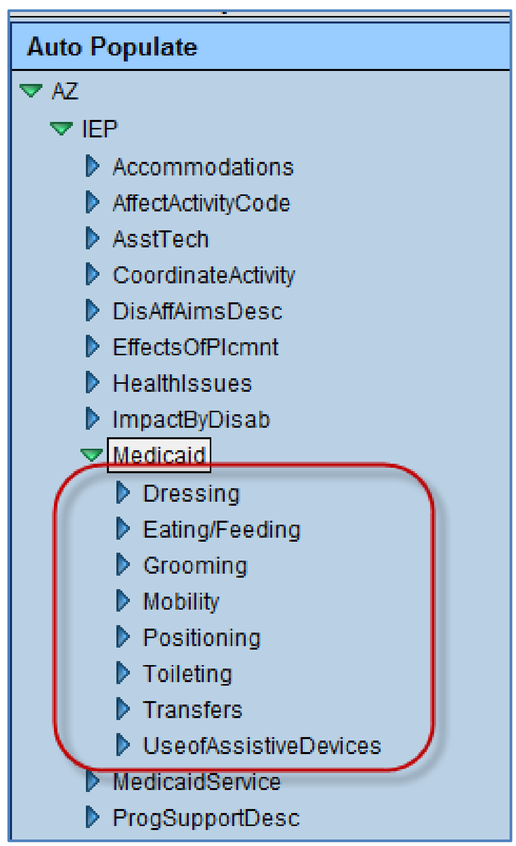


Figure 5-24 Auto Populate Screen Medicaid Sub-categories

For each new question:

9. Add lines to Name and Response grid.
10. Text in the **Name** column will be seen in the drop-down.
11. Text in the **Response** column will feed into the text field when the name is selected.
12. Click Save when finished.

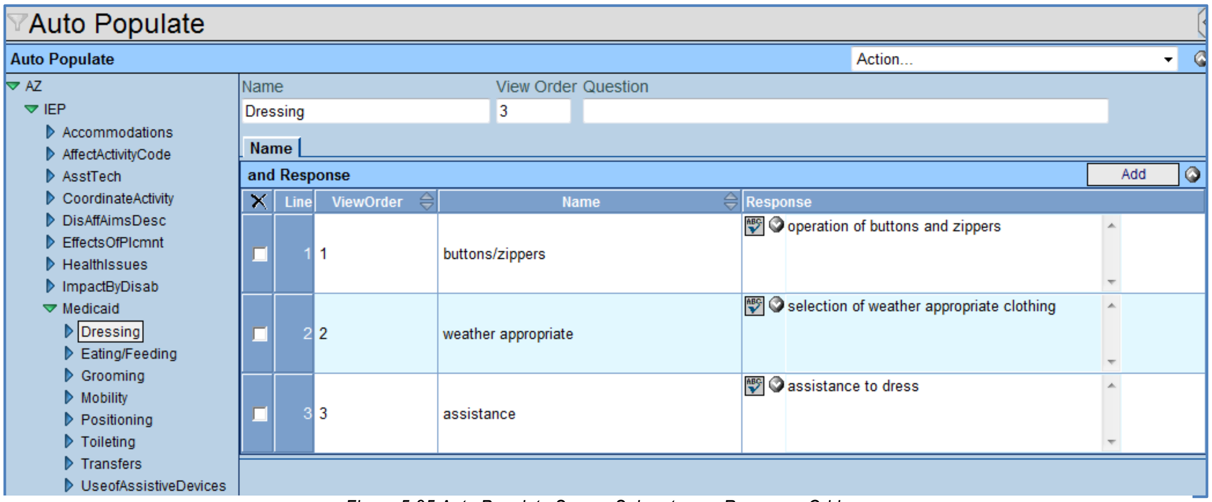


Figure 5-25 Auto Populate Screen Sub-catogory Response Grid

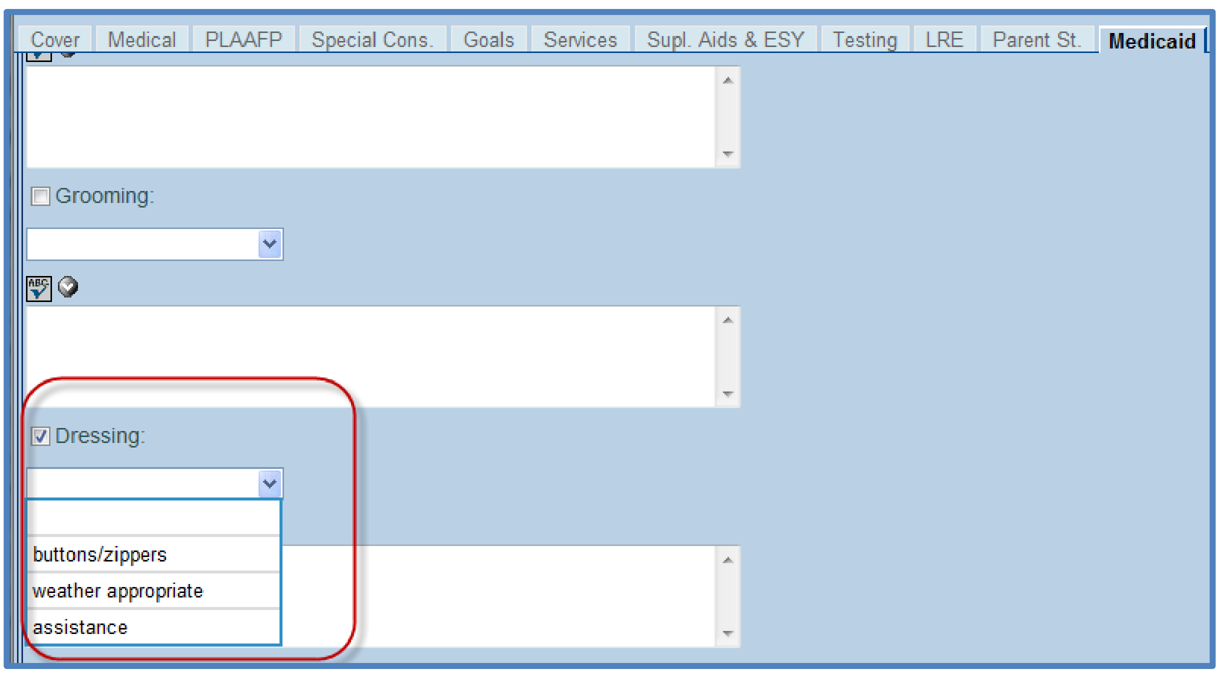


Figure 5-26 Student IEP Screen Medicaid Tab Drop-down

Suggested text for additional areas; others may be added at local option

Eating/Feeding
food preparation
cleaning up spoon feeding
food choices
setting up foods
assisting to eat
Mobility
moving between locations
assisting with wheelchair
Toileting
use of toilet/sink
ensuring cleanliness following elimination
feminine hygiene
diapering
UseofAssistiveDevices
communicative devices
standers
lifters
braces

Grooming
personal hygiene
combing/brushing hair
insertion and removal of contact lenses
putting on and removing glasses
insertion and removal of hearing aids
Positioning
assisting and accompanying between locations
assisting with walker
Transfers
assisting with moving between positions
two people transfers
Hoyer lift
sliding board

Table 7 Suggested Medicaid Billing Statements

IEP Section Titles

Specific headings and subheadings in the AZ IEP, VA IEP, KS IEP, MET, SEC, and CET can be edited. The customization can be made using Auto Populate. The auto populate path for the IEP is NTL> IEP > CustomHeading.

> **Note:** To support existing AZ customers the Auto Populate path of AZ > IEP > CustomHeading and AZ > MET > CustomHeading can be used. All customers who have not used this custom heading/subheading feature should use the NTL path in Auto Populate.

1. Navigate to the Auto Populate screen.
2. Click on next to **NTL** to expand.
3. Click on **IEP.**
4. Click Action ... .
5. Select **Add Question to IEP.** AutoPopulateGrid screen opens.
6. Enter CustomHeading in the Name field.
7. Click Save. AutoPopulateGrid screen closes and CustomHeading displays under the IEP.

Your Auto Populate tree should look similar to the picture below.

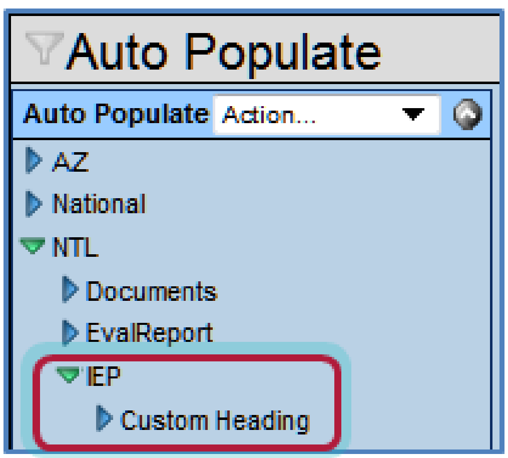


Figure 5-27 Auto Populate Screen Custom Heading

Add Customized IEP Section Headings And Subheadings

The IEP section headings that are customizable include Sections B, D, F, G, H, I, J, K, and L.

1. **Add** lines to Name and Response Grid *only* for IEP section headings that will be modified.
2. Complete the **ViewOrder, Name, and Response fields**. View Order and Name *must* be as shown in the chart below (Table 8); the letter *cannot* be changed.
3. For subheadings, add **SH** to the end of the **Name** as shown in picture and chart below.
4. Click Save when finished.

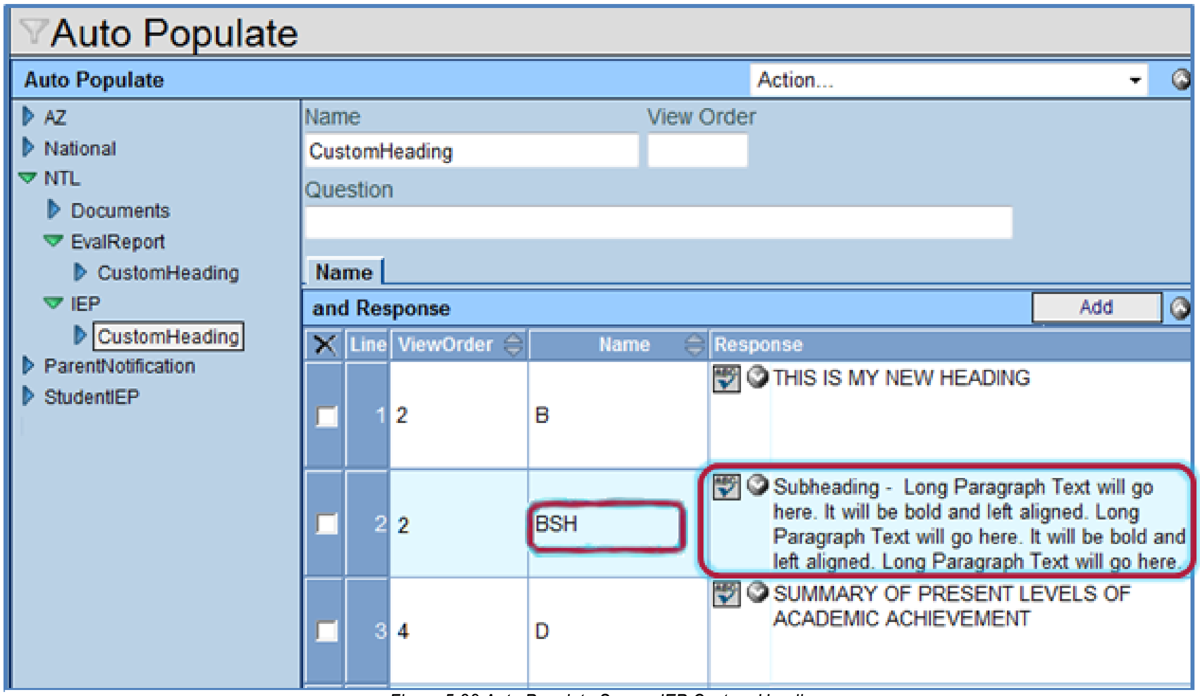
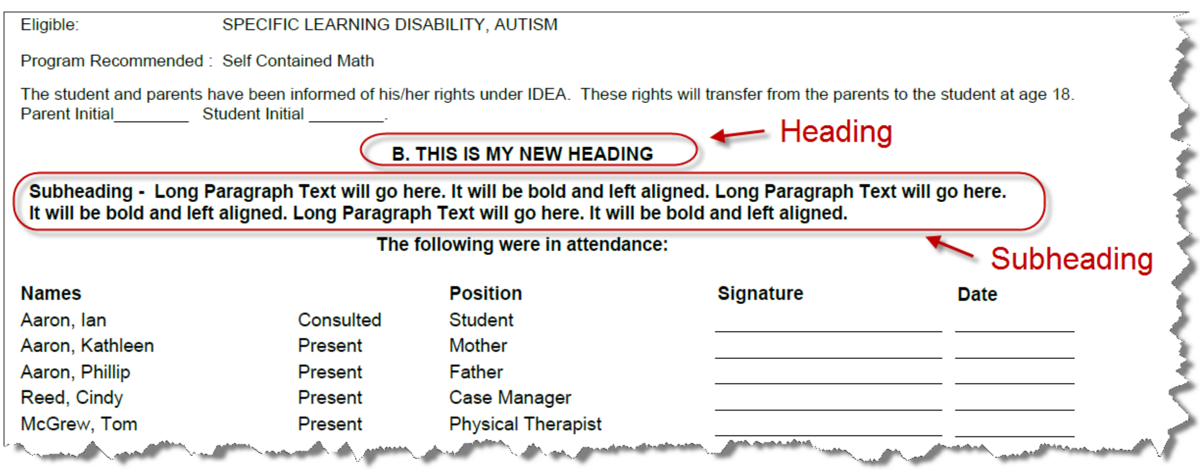


Figure 5-28 Auto Populate Screen IEP Custom Heading

Printable IEP from Auto Populate CustomHeading



Eligible: SPECIFIC LEARNING DISABILITY, AUTISM

Program Recommended : Self Contained Math

The student and parents have been informed of his/her rights under IDEA. These rights will transfer from the parents to the student at age 18.
Parent Initial________ Student Initial ________.

B. THIS IS MY NEW HEADING

Subheading - Long Paragraph Text will go here. It will be bold and left aligned. Long Paragraph Text will go here. It will be bold and left aligned. Long Paragraph Text will go here. It will be bold and left aligned.

The following were in attendance:

Names		Position	Signature	Date
Aaron, Ian	Consulted	Student		
Aaron, Kathleen	Present	Mother		
Aaron, Phillip	Present	Father		
Reed, Cindy	Present	Case Manager		
McGrew, Tom	Present	Physical Therapist		

Figure 5-29 Printalble IEP Custom Heading

Titles (letters) as they should appear in the **Name** column are listed below. The letter must *match exactly* in order for the Response text to display in the printable IEP:

IEP VIEWORDER AND NAME REFERENCE	
VIEWORDER	**NAME**
2	B
2	BSH
4	D
4	DSH
6	F
6	FSH
7	G
7	GSH
8	H
8	HSH
9	I
9	ISH
10	J
10	JSH
11	K
11	KSH
12	L
12	LSH

Table 8 IEP View Order

Multidisciplinary Education Team Report (MET)

The MET Report is located in the Process Documents for each student (depending on the current process the student is in). The MET Report document contains several drop-down libraries. The library statements can be maintained by individual districts. Statements can be edited, removed or added.

Library Statements

1. To locate the correct Auto Populate library open a **MET** report document on the student's Process Docs tab.
2. Locate the textbox in question.
3. Hover the mouse over the textbox. A box pops up with the name of the table. This functionality is referred to as *show BO on mouseover.* See: User Special Ed Settings.

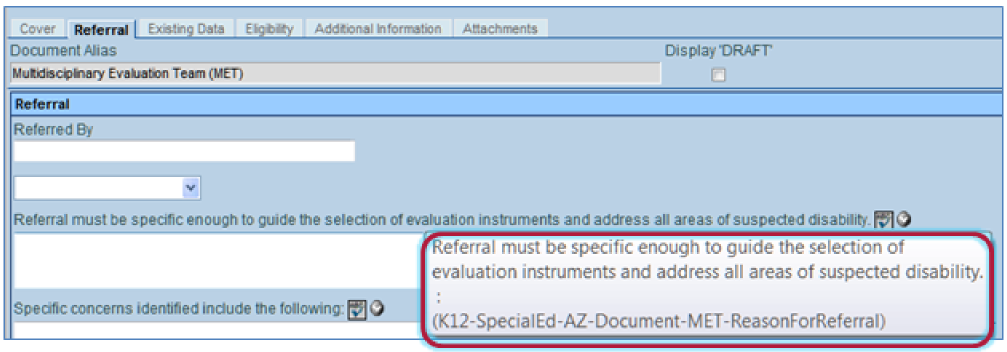


Figure 5-30 MET Screen BO Mouseover Example

4. Navigate to the **Auto Populate** screen.

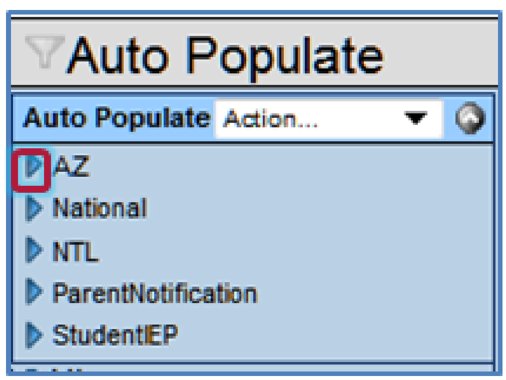


Figure 5-31 Auto Populate Screen Expand Library

5. Click on next to AZ to expand.
6. Click on next to **MET** to expand.

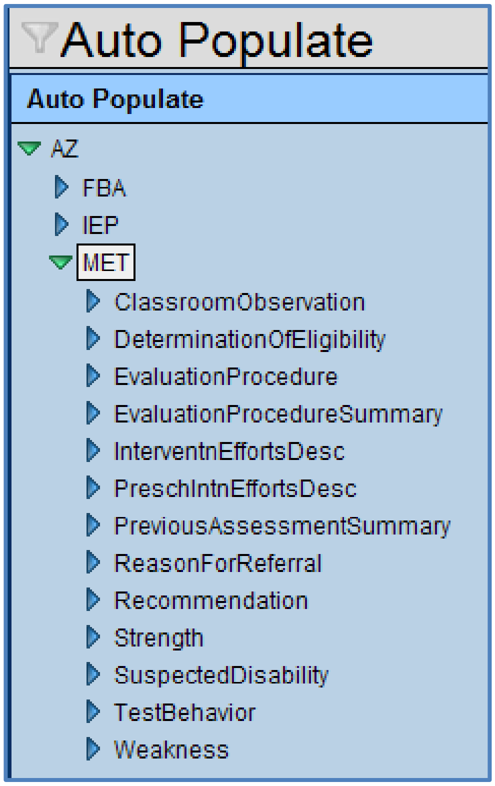


Figure 5-32 Auto Populate Screen Expand Library

7. Click on the name of the specific **Auto Populate Library** to highlight and open its Auto Populate library statements. In this example, the BO told us the library was ReasonForRefferal.

On this screen, the statements can be added, deleted or edited.

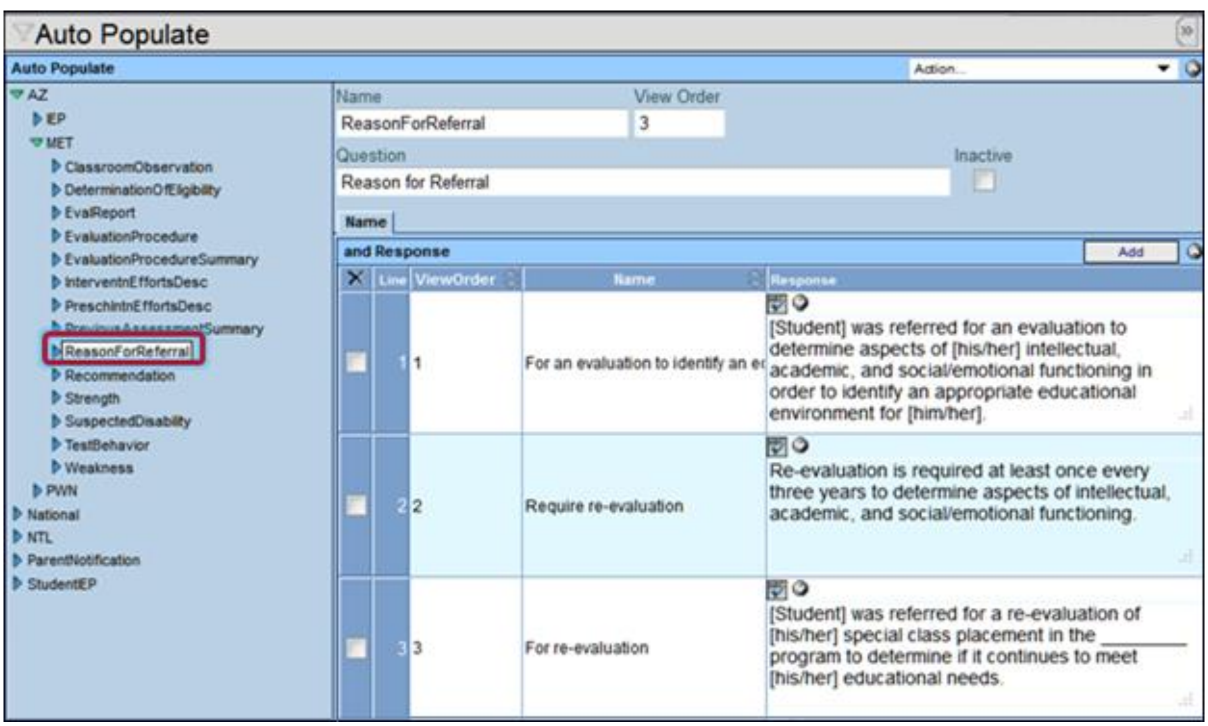


Figure 5-33 Auto Populate Screen Reason for Referral Library Statements

Add New Auto Populate Statement

1. Click Add on the and Response bar. A new row displays at the bottom of list.
2. Enter the **View Order**.
3. Enter the **Name** of the statement. This is what the user will see from the drop-down list.
4. Enter the **Response** statement. This is what will populate in the text box.
5. Click Save.

Edit Existing Auto Populate Statement

1. Edit the numbers in the ViewOrder column to reflect the desired order of the statements.
2. Check on the line of a statement to delete, if desired.
3. Edit the **Name** of the statement. These are the key words that the user sees in the drop-down. Once selected the entire statement (Response) displays in the textbox.
4. Edit the Response statement. If desired, the student name will populate in the textbox if **<Student>** is typed into the statement. For example: *"<Student> is engaging in behavior…"* will appear in the document as *"Harry is engaging in behavior…"* for a student named Harry.
5. Click Save when finished.

Library Statements with Sub-Categories

Some Auto Populate Libraries in the MET Report will have additional categories embedded within the libraries. For example, on this screen, Recommendation has eleven subcategories. Subcategories are helpful when many library statements exist for a library. Sets of statements can be divided into subcategories which assist the user in locating the statements.

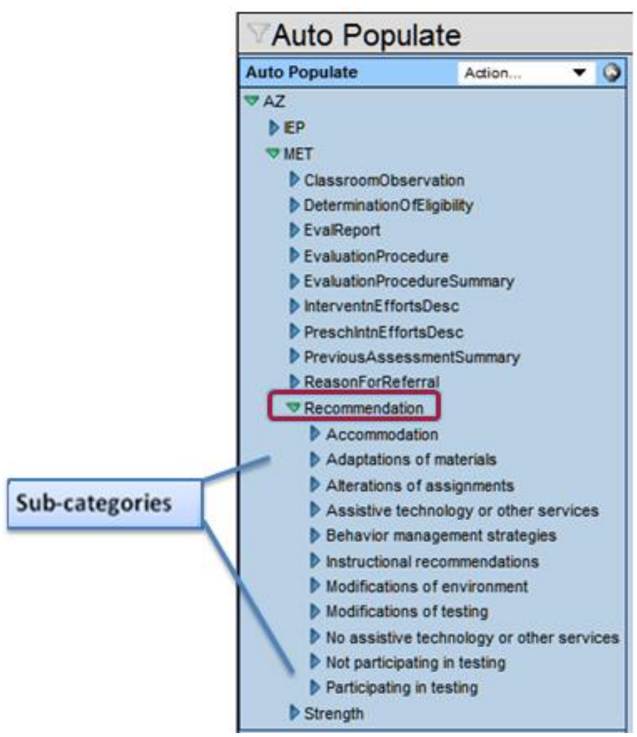


Figure 5-34 Auto Populate Screen Sub-categories

The sub-categories display in folders underneath the main library statement.

1. Click on next to the **category** to expand the sub-categories.
2. Click on the **sub-category** to open the statements.
3. Edit the statements as instructed above.

MET Section Titles

Specific headings and subheadings in the AZ IEP, VA IEP, KS IEP, MET, SEC, and CET can be edited. The customization can be made using Auto Populate. The auto populate path for the MET NTL > EvalReport > CustomHeading (EvalReport pertains to the MET).

Note: To support existing AZ customers the Auto Populate path of AZ > IEP > CustomHeading and AZ > MET > CustomHeading can be used. All customers who have not used this custom heading/subheading feature should use the NTL path in Auto Populate.

1. Navigate to the **Auto Populate** screen.
2. Click on next to **NTL** to expand.
3. Click **Action ...** .
4. Select **Add Question to NTL**. AutoPopulateGrid screen opens.

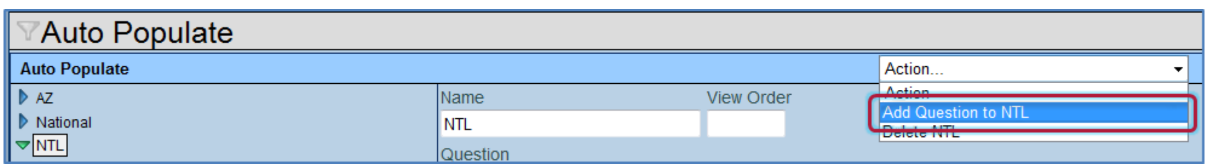


Figure 5-35 Auto Populate Screen NTL Library

5. Enter **EvalReport** in the **Name** field.
6. Click Save. AutoPopulateGrid screen closes and EvalReport displays under NTL.
7. Click on **EvalReport.**
8. Click **Action ... .**
9. Select **Add Question to EvalReport.** AutoPopulateGrid screen opens.
10. Enter **CustomHeading** in the Name field**.**
11. Click Save. AutoPopulateGrid screen closes and CustomHeading displays under EvalReport.

Your Auto Populate tree should look similar to the picture below.

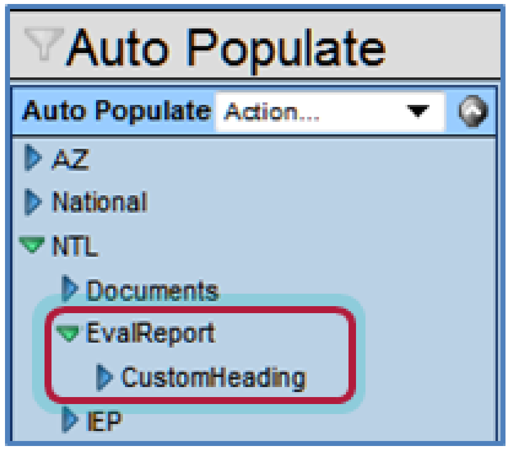


Figure 5-36 Auto Populate Screen Expand Library

ADD CUSTOMIZED EVAL REPORT (MET) SECTION HEADINGS & SUBHEADINGS

1. Add lines to **Name** and **Response** grid *only* for Eval Report (MET) section headings that will be modified. Complete the **ViewOrder, Name, and Response fields**. Name *must* be as shown in the chart below; the letter *cannot* be changed.
2. For subheadings, add **SH** to the end of the **Name** as shown in picture and chart below.

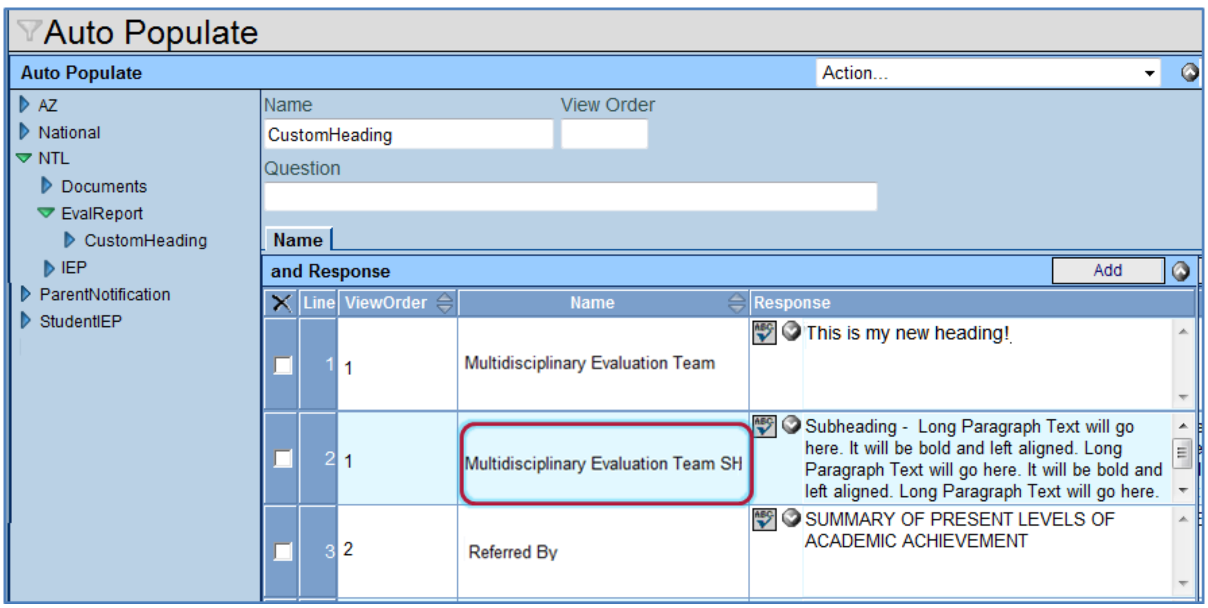


Figure 5-37 Auto Populate Screen CustomHeading Grid

Each Name corresponds to a specific section title (see Table 9).

Titles as they should appear in the **Name** column are listed below (Table 9). The name must *match exactly* in order for the Response text to display in the printable MET report.

MET ViewOrder and Name Reference			
ViewOrder	**Name**	**ViewOrder**	**Name**
1	Multidisciplinary Evaluation Team	11	Need for Additional Data
1	Multidisciplinary Evaluation Team SH	11	Need for Additional Data SH
2	Referred By	12	Evaluation Procedures
2	Referred By SH	12	Evaluation Procedures SH
3	Reason for Referral	13	Classroom Observations
3	Reason for Referral SH	13	Classroom Observations SH
4	Efforts to Educate	14	Test Behavior
4	Efforts to Educate SH	14	Test Behavior SH
5	Attendance and Educational History	15	Assessment Results
5	Attendance and Educational History SH	15	Assessment Results SH
6	Summary of Previous Assessments	16	Other Findings
6	Summary of Previous Assessments SH	16	Other Findings SH
7	State and District Testing	17	Summary of Additional Data
7	State and District Testing SH	17	Summary of Additional Data SH
8	Background Information	18	Summary of Student Performance
8	Background Information SH	18	Summary of Student Performance SH
9	Classroom Based Assessment	19	Educational Needs andRecommendations
9	Classroom Based Assessment SH	19	Educational Needs andRecommendation SH
10	Impact of Educational Disadvantage	20	Determination of Eligibility
10	Impact of Educational Disadvantage SH	20	Determination of Eligibility SH

Table 9 MET View Order and Name Reference

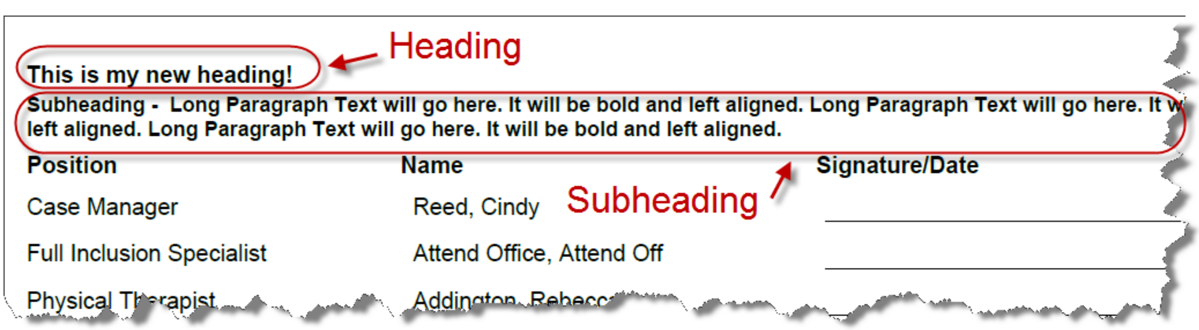


Figure 5-38 Printable MET Report Example

Printable MET from Auto Populate CustomHeading

PARENT PERMISSION (GENAZ 05)

CUSTOM PARAGRAPHS

The Parent Permission GENAZ 05 contains 2 paragraphs below the salutation that may be customized using Auto Populate.

1. Navigate to the **Auto Populate** screen.
2. Click on the name **AZ.** The detailed view displays on right.
3. Click **Action ...** .
4. Select **Add Question to AZ.** The AutoPopulateGrid screen opens.

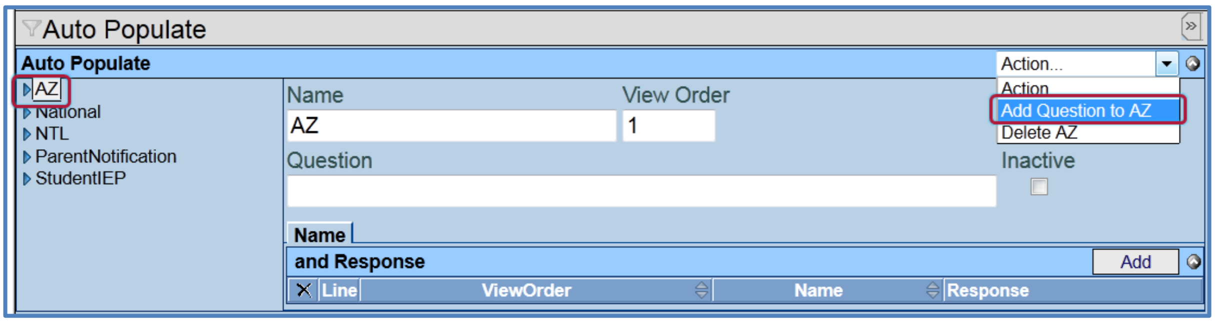


Figure 5-39 Auto Populate Screen AZ Details

5. Name the new question **ParentStatementCustomizations**.
6. Click Save. The screen closes and the information is displayed.
7. Click on name **ParentPermission**. The detailed view displays on right.
8. Click Add on the **and Response** bar. A new line is added to the grid.
9. Enter **Parent Permission Text 1** in the **Name** field.
10. Enter the text that will replace the current first paragraph of the Parent Permission document in the **Response** field.

> **Note:** The Response for Parent Permission Text 1 may contain a token that will be replaced with the defined Organization name. The Response must contain the embedded text "[!Organization]". It will be replaced by the defined Organization name.

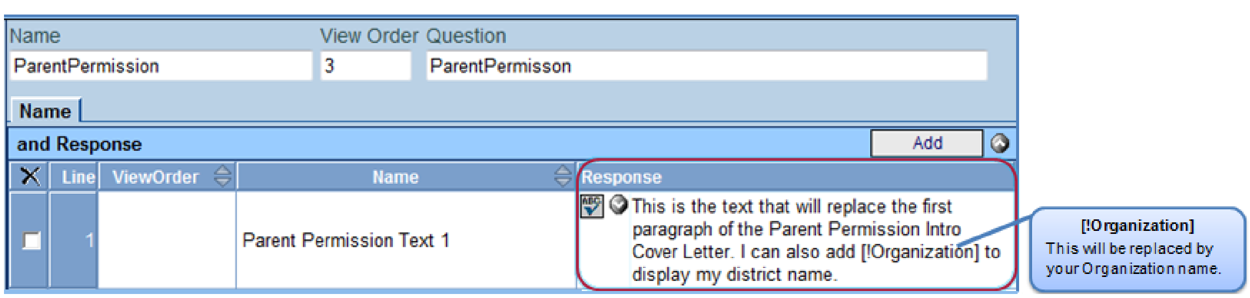


Figure 5-40 Auto Populate Screen Parent Permission Grid

11. Click Add on the **and Response** bar, again. Another line is added to the grid.

12. Enter **Parent Permission Text 2** in the **Name** field.
13. Enter the text that will replace the current second paragraph of the Parent Permission document in the **Response** field.
14. Click Save.

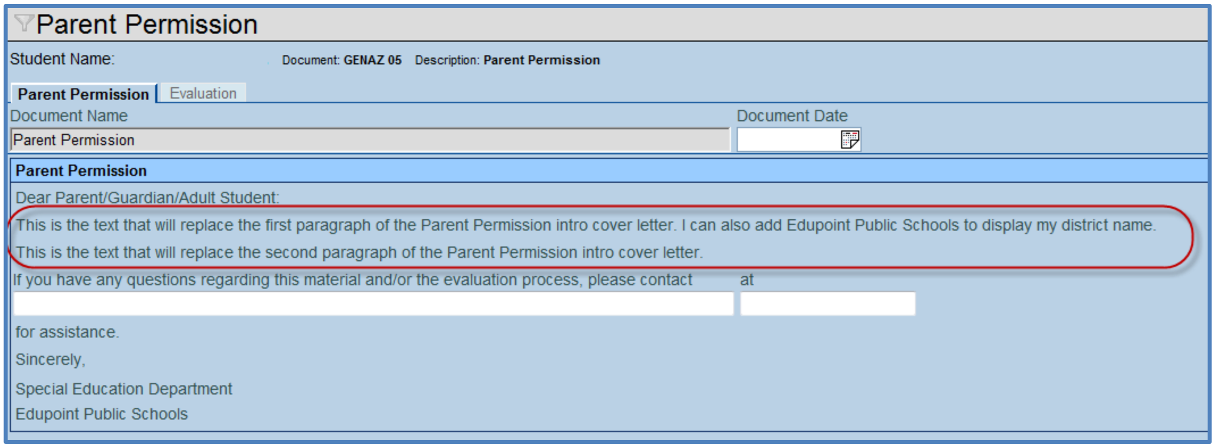


Figure 5-41 Parent Permission Screen Example of Custom Text

Custom Evaluation Components

The Evaluation Components listed in the Evaluation tab of the Parent Permission document can be managed by individual districts.

1. Navigate to the **Auto Populate** screen.
2. Click on next to **National** to expand.
3. Click on the name **Documents.** The detailed screen displays on right.
4. Click **Action ...** .

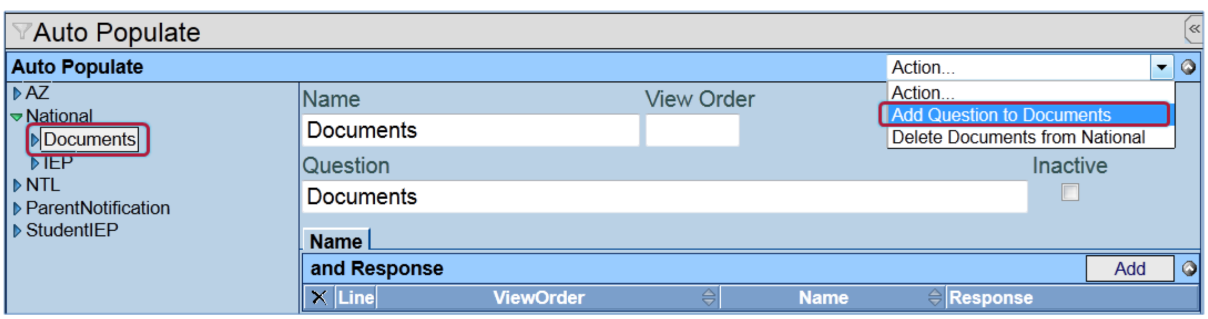


Figure 5-42 Auto Populate Screen Documents Grid

5. Select **Add Question to Documents**. AutoPopulateGrid screen opens.
6. Enter **GENAZ 05** in the **Name** field. AutoPopulateGrid screen closes and the information displays.
7. Use Add to create rows. Each row will represent an evaluation component.

Enter the Name(s) of the components as indicated in the screenshot below.

Enter the text that will display in the Response column.

8. Click Save.

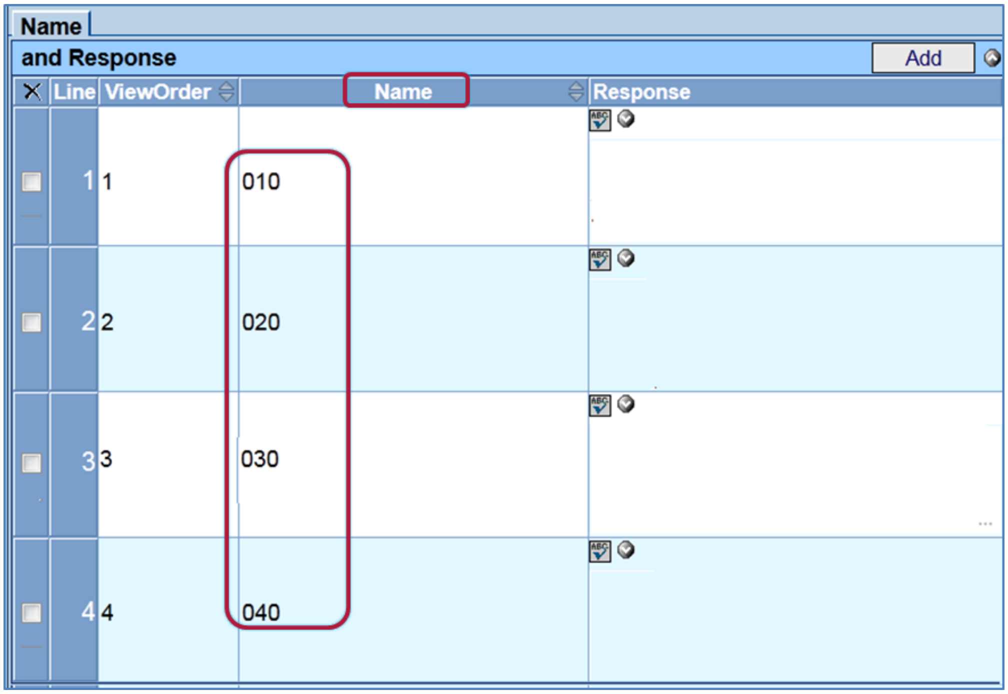


Figure 5-43 GENAZ05 Details Grid

9. Navigate to the **Document Definition** screen.
10. Open **GENAZ 05.**
11. On the Document Definition tab enter **EVALUATION_LIST="New**" in the **Special Flags** textbox.

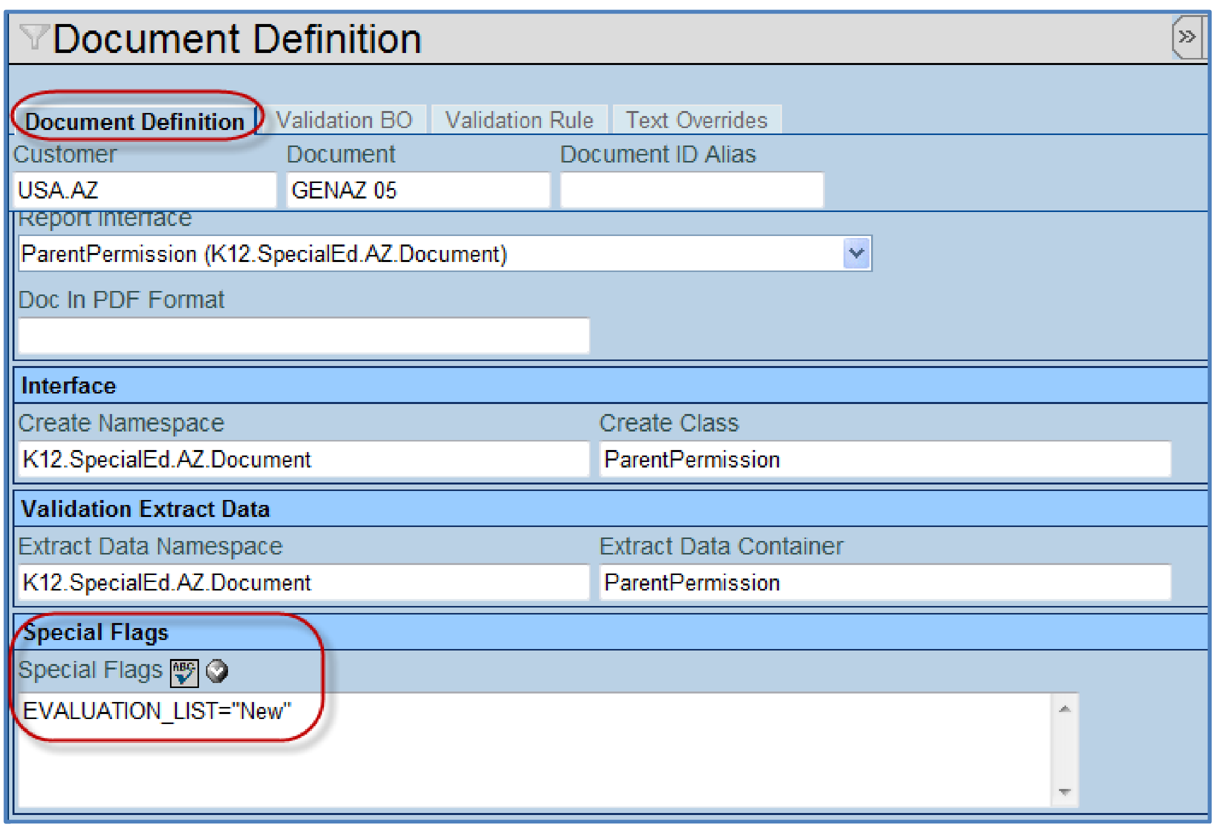


Figure 5-44 Document Definition Screen Document Definition Tab

12. Click Save.

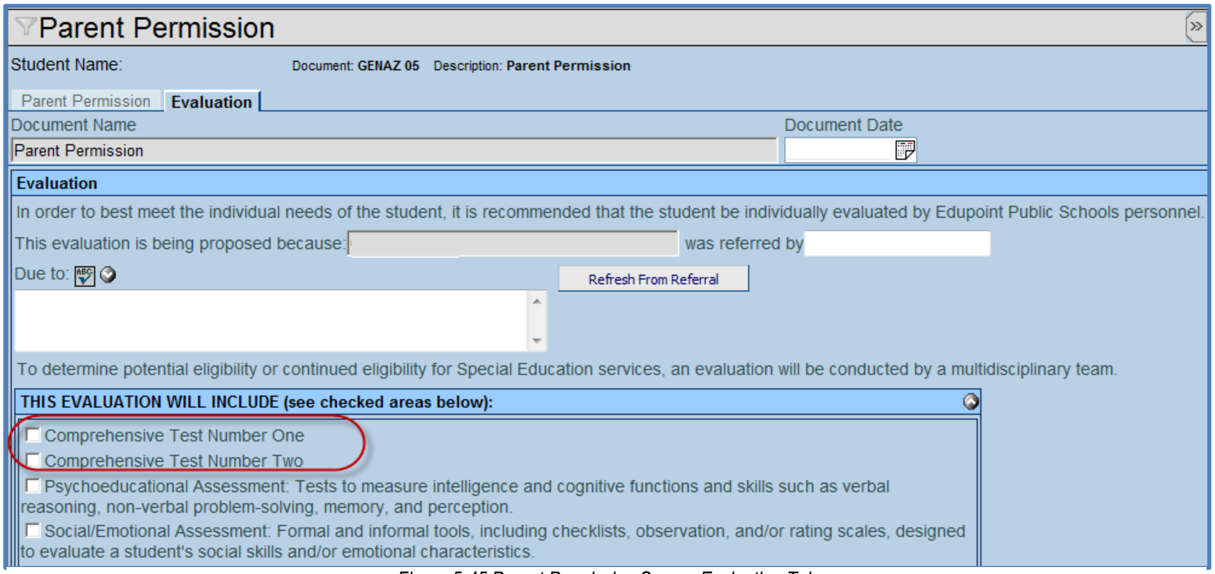
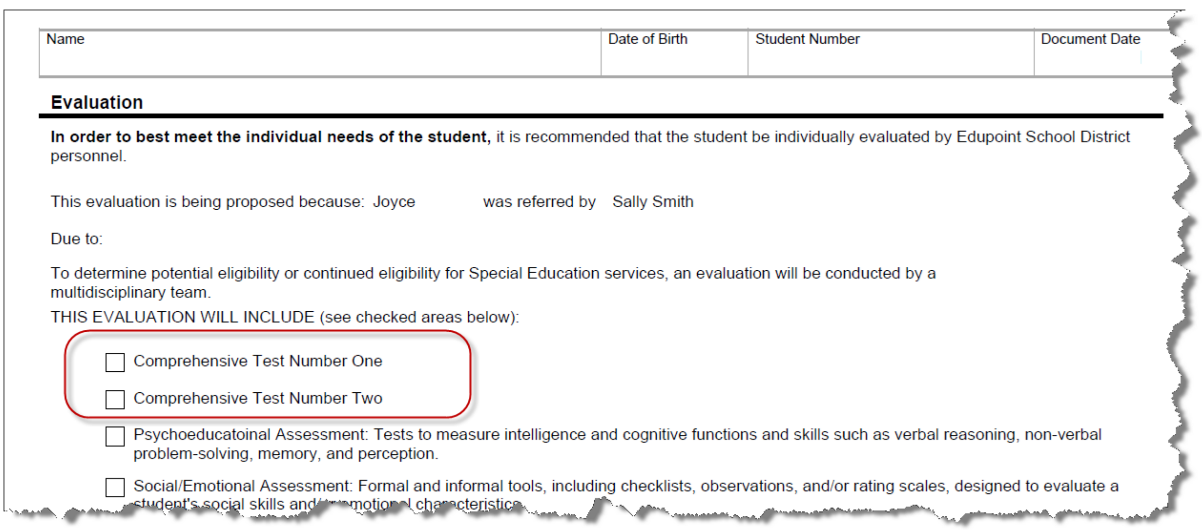


Figure 5-45 Parent Permission Screen Evaluation Tab

Printable Parent Permission from Auto Populate GENAZ 05



Name	Date of Birth	Student Number	Document Date

Evaluation

In order to best meet the individual needs of the student, it is recommended that the student be individually evaluated by Edupoint School District personnel.

This evaluation is being proposed because: Joyce was referred by Sally Smith

Due to:

To determine potential eligibility or continued eligibility for Special Education services, an evaluation will be conducted by a multidisciplinary team.

THIS EVALUATION WILL INCLUDE (see checked areas below):

- ☐ Comprehensive Test Number One
- ☐ Comprehensive Test Number Two
- ☐ Psychoeducatoinal Assessment: Tests to measure intelligence and cognitive functions and skills such as verbal reasoning, non-verbal problem-solving, memory, and perception.
- ☐ Social/Emotional Assessment: Formal and informal tools, including checklists, observations, and/or rating scales, designed to evaluate a student's social skills and/or emotional characteristics

Figure 5-46 Parent Permission Printable Example

Prior Written Notice (PWN)

Customize Opening Statement

The opening statement of a Prior Written Notice (PWN) may be customized through Document Definition.

1. Insert this value in the Special Flags textbox (statement goes between quotes): **PURPOSE_STATEMENT=" ";**
2. Click Save.

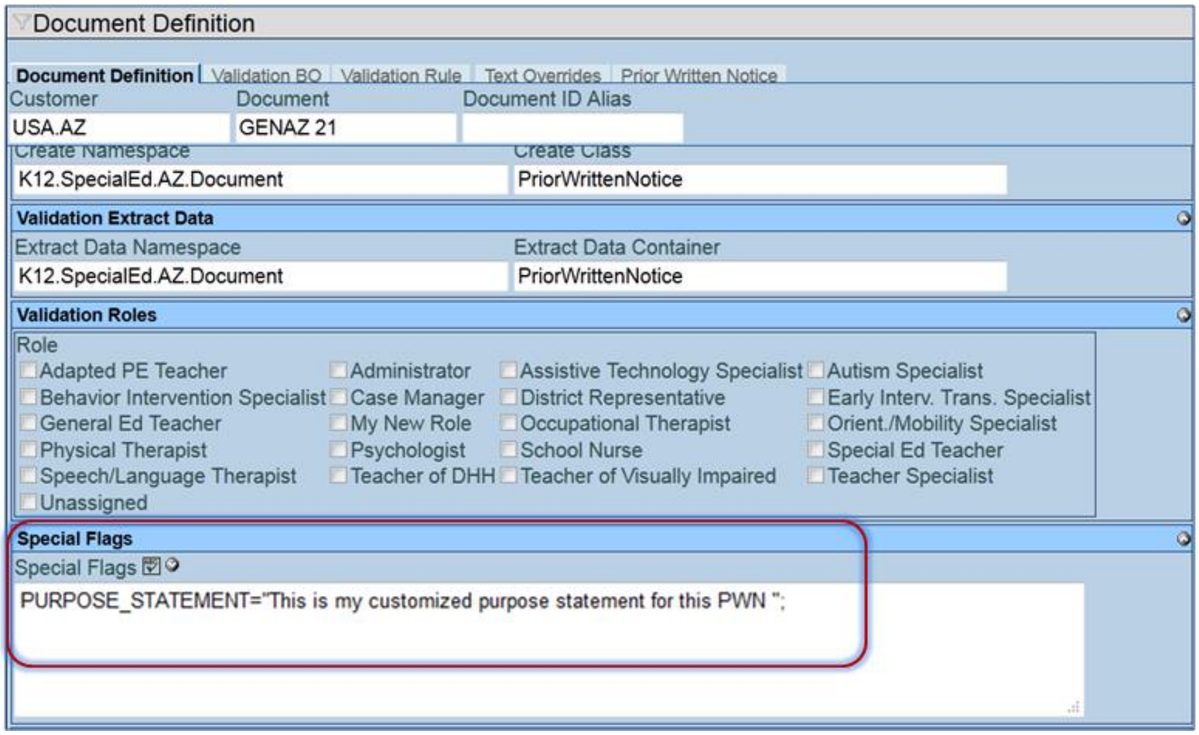


Figure 5-48 Document Definition Screen Document Definition Tab

Printable PWN from Document Definition

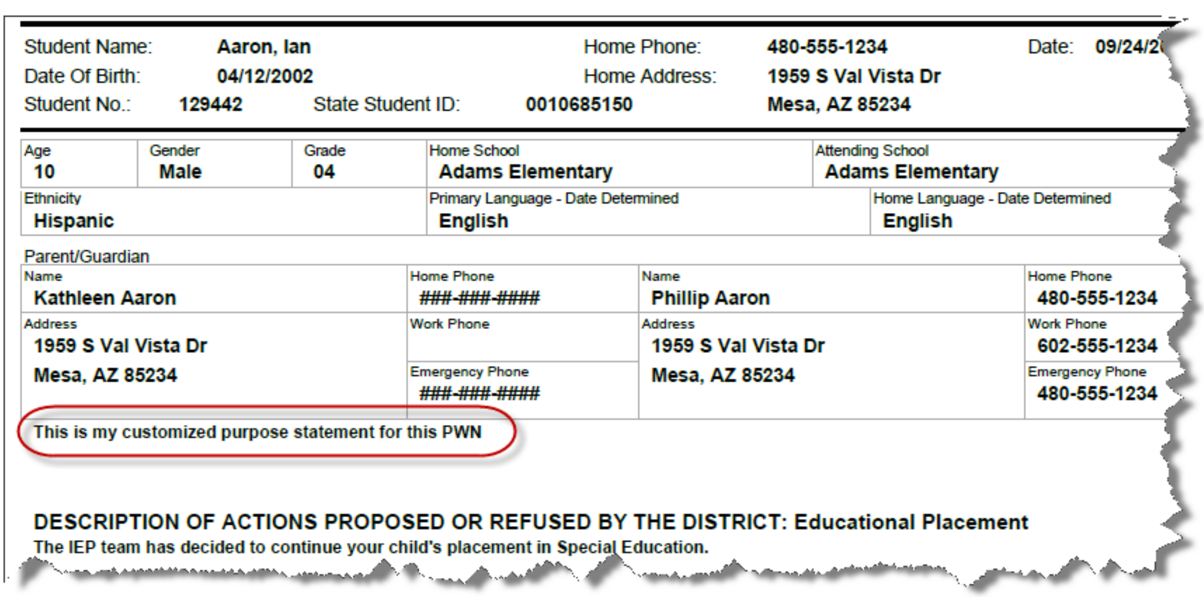


Figure 5-49 Cusomized Printable PWN Example

Customize Sources of Assistance

To customize Sources of Assistance it needs to be selected from the Document Options tab of the NTL Setup screen.

1. Navigate to **NTL>Setup** screen.
2. Select the **Document Options** tab.
3. Make sure Use Auto Populate for ‘Sources of Assistance’ in Prior Written Notice is checked.
4. Click Save.

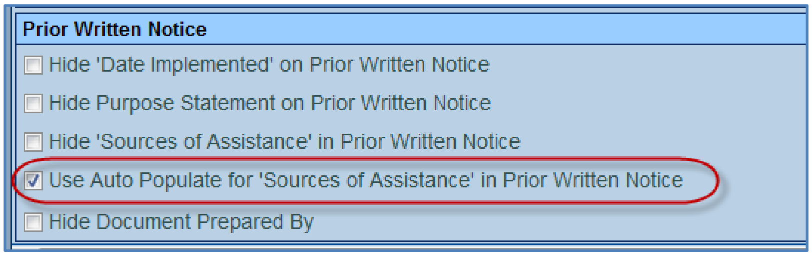


Figure 5-50 Setup Screen Document Options Tab

5. Navigate to the **Auto Populate** screen.
6. Click on next to **AZ** to expand.

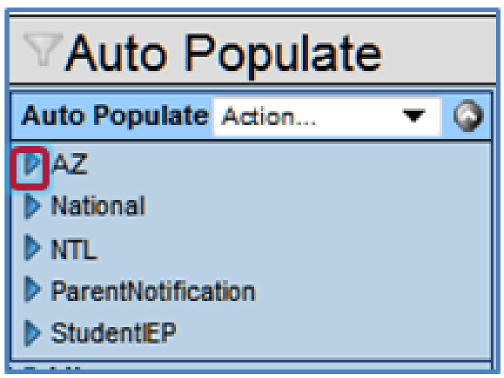


Figure 5-51 Auto Populate Screen

7. Click on name **Document.** The detailed screen displays on right..
8. Click **Action ...**
9. Select **Add Question to Document**. The AutoPopulateGrid screen opens.
10. **Name** the new question **PWN.**.
11. Click Save. The screen closes and the information is displayed.
12. Click Add on the **and Response** bar.
13. Enter the View Order.
14. Enter **SOURCE_OF_ASSISTANCE_1** in the **Name** field.
15. Enter the text to display in the **Response** field..
16. Repeat the above instructions for additional sources. Up to four Sources of Assistance can be added.
17. Click Save when finished.

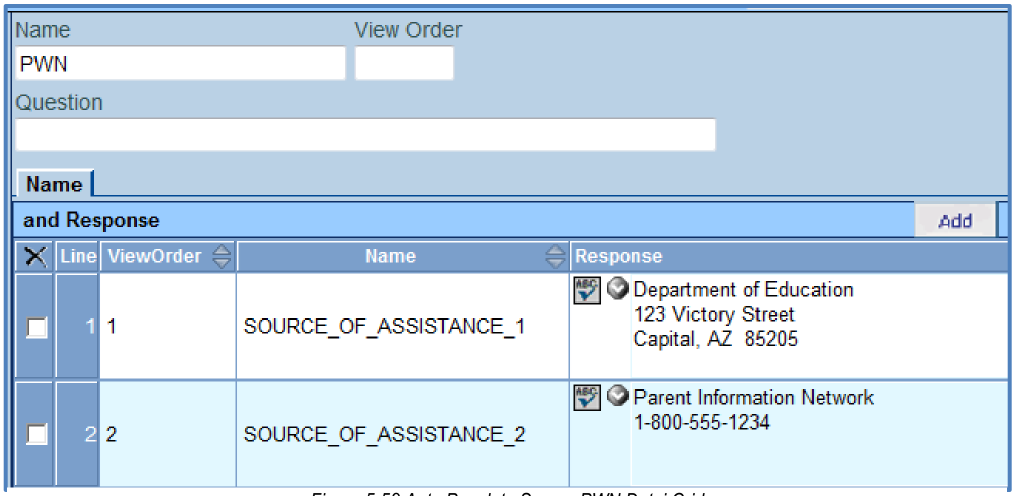
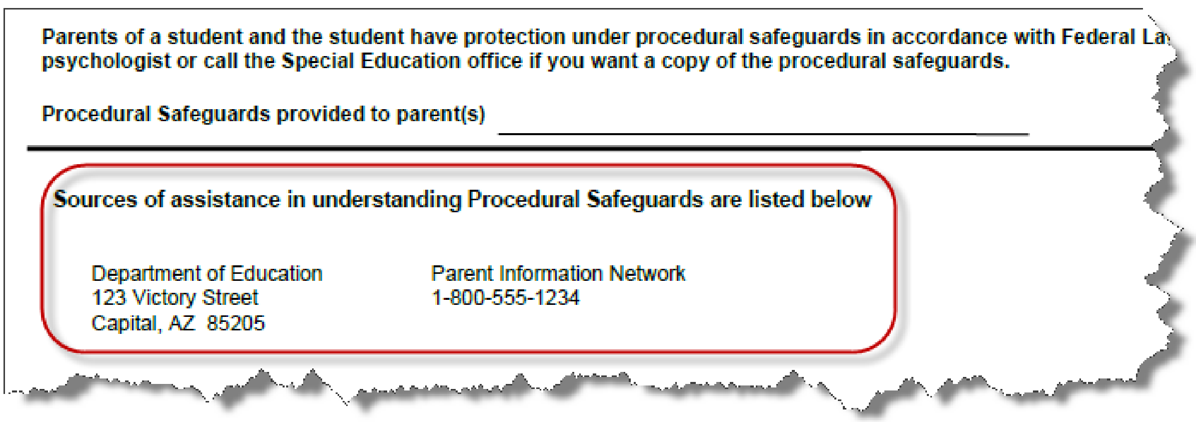


Figure 5-52 Auto Populate Screen PWN Detai Grid

Printable Prior Written Notice from Auto Populate PWN.


Parents of a student and the student have protection under procedural safeguards in accordance with Federal La psychologist or call the Special Education office if you want a copy of the procedural safeguards.

Procedural Safeguards provided to parent(s) ____________________

Sources of assistance in understanding Procedural Safeguards are listed below

Department of Education
123 Victory Street
Capital, AZ 85205

Parent Information Network
1-800-555-1234

Figure 5-53 Prior Written Notice Printable Example

PRINT ONLY AD HOC DOCUMENTS

The font and style for Print Only Ad Hoc Documents can be modified.

MODIFY EXISTING PRINT ONLY AD HOC DOCUMENT

1. Navigate to **Document Definition.**
2. Navigate to the **Print Only document** you wish to modify. (If desired, select and copy the current text of the Print Only document from the Print Only tab. This text will be pasted into a new textbox for formatting.)

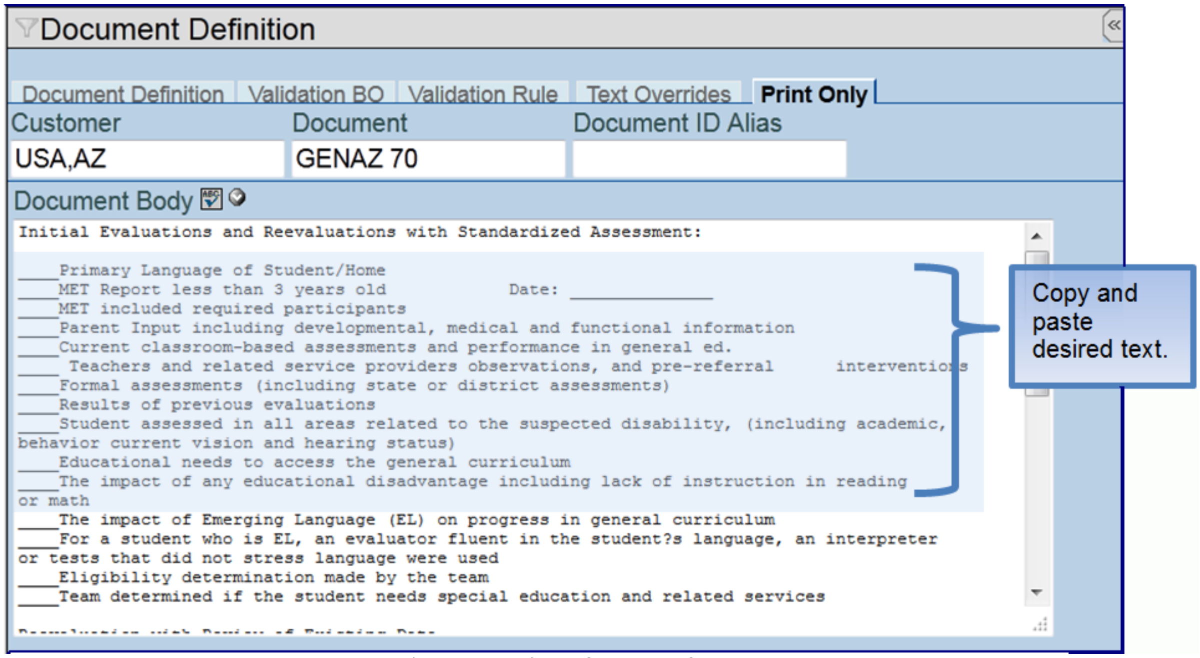


Figure 5-54 Document Definition Screen Print Only Tab

3. Return to the **Document Definition** tab.

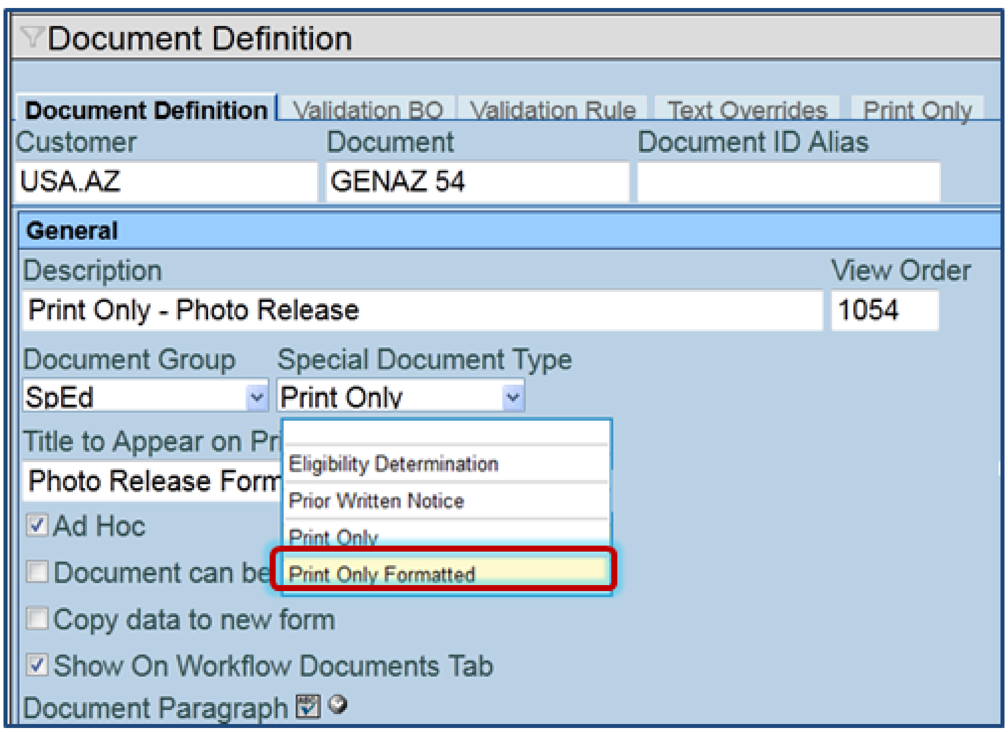


Figure 5-55 Doucment Definition Screen Document Definition Tab

4. Click **Special Document Type** and select **Print Only Formatted**.
5. Click Save. A new tab labeled Print Only Formatted is displayed.
6. Click on the **Print Only Formatted** tab.

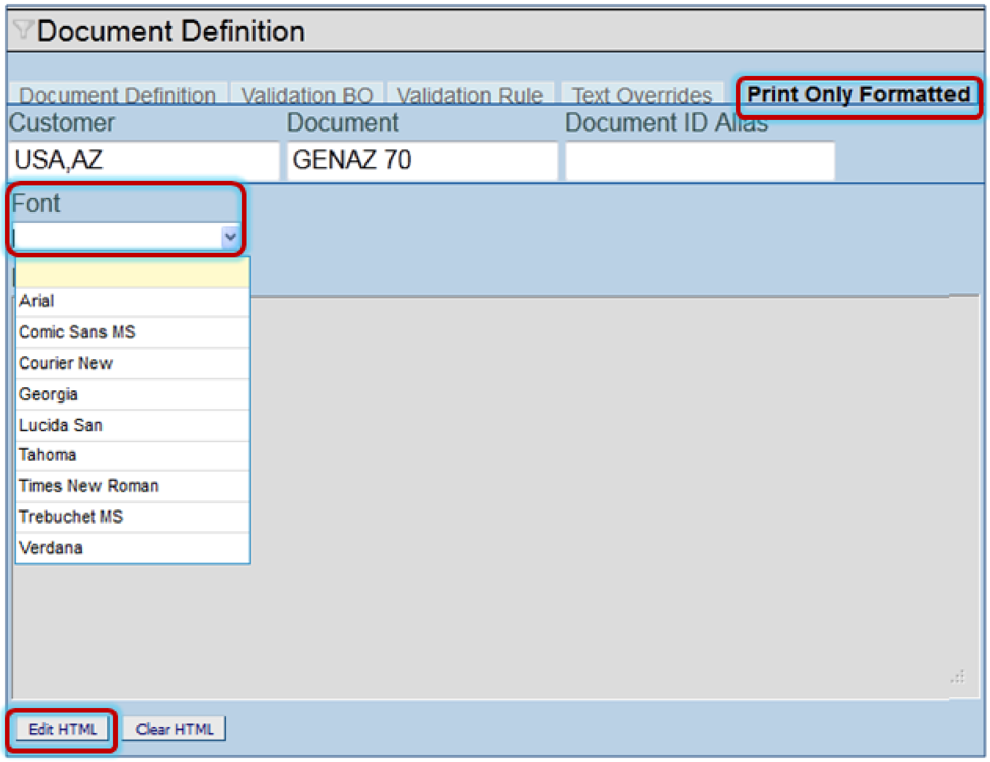


Figure 5-56 Document Definition Screen Print Only Formatted Tab

7. Click **Font** and select desired font.
8. Click Save.
9. Click **Edit HTML**. The Edit HTML Report Body screen opens.

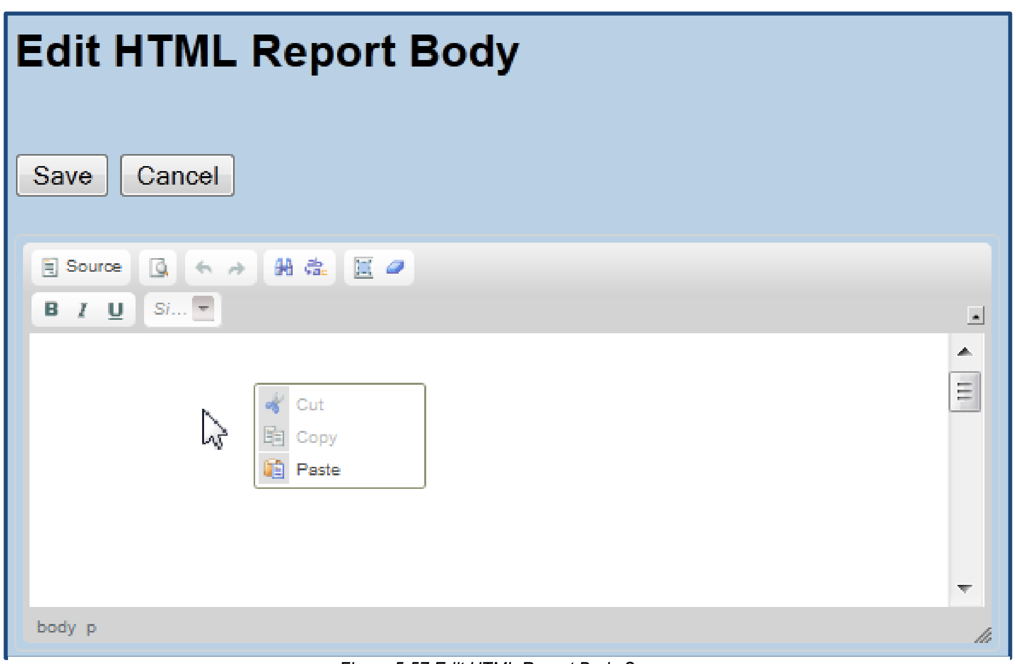
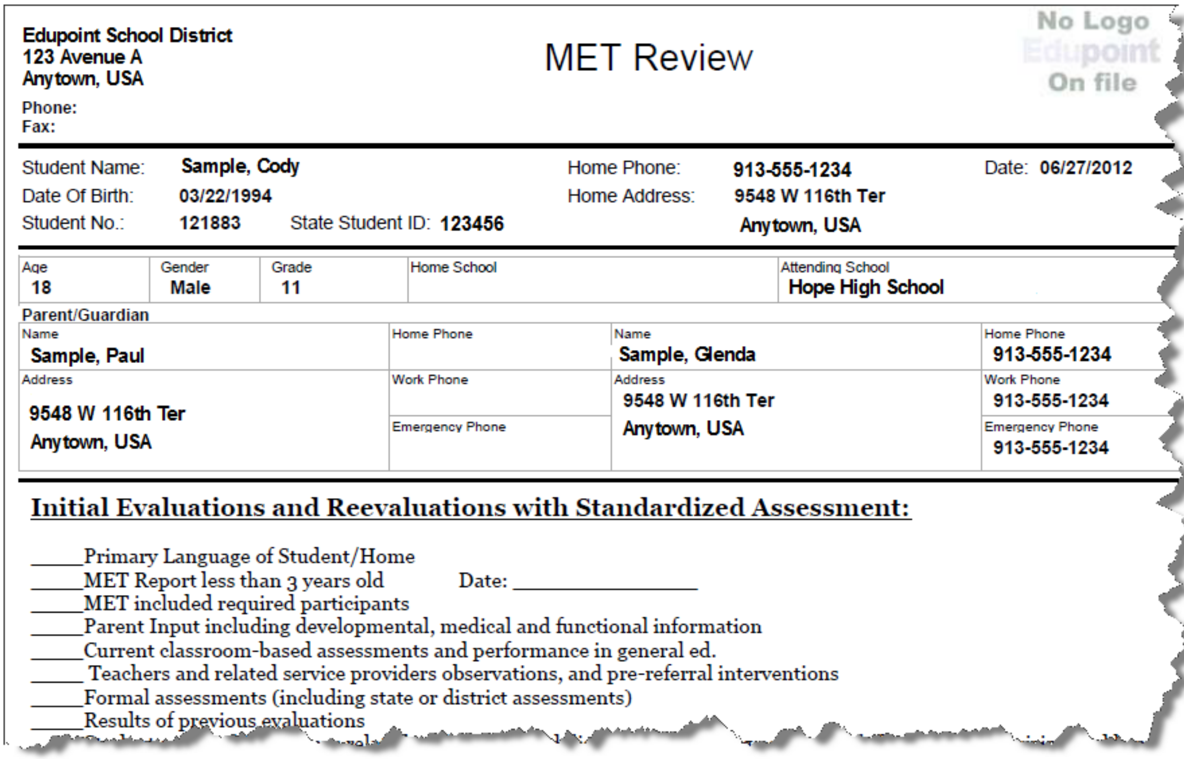


Figure 5-57 Edit HTML Report Body Screen

10. Paste your previously copied Print Only text by placing your cursor in the box, right clicking and selecting **Paste.**
11. Using the Style buttons, **format text** as desired.

12. Click Save. The new formatted text displays when the Print Only document in Ad Hoc Documents is accessed.

Example of new print only document from Document Definition



Edupoint School District
123 Avenue A
Anytown, USA
Phone:
Fax:

MET Review

No Logo Edupoint On file

Student Name:	**Sample, Cody**	Home Phone:	**913-555-1234**	Date:	**06/27/2012**
Date Of Birth:	**03/22/1994**	Home Address:	**9548 W 116th Ter**		
Student No.:	**121883** State Student ID: **123456**		**Anytown, USA**		

Age	Gender	Grade	Home School	Attending School
18	Male	11		Hope High School

Parent/Guardian

Name	Home Phone	Name	Home Phone
Sample, Paul		**Sample, Glenda**	**913-555-1234**
Address	**Work Phone**	**Address**	**Work Phone**
9548 W 116th Ter Anytown, USA		**9548 W 116th Ter Anytown, USA**	**913-555-1234**
	Emergency Phone		**Emergency Phone**
			913-555-1234

Initial Evaluations and Reevaluations with Standardized Assessment:

_____Primary Language of Student/Home
_____MET Report less than 3 years old Date: _______________
_____MET included required participants
_____Parent Input including developmental, medical and functional information
_____Current classroom-based assessments and performance in general ed.
_____ Teachers and related service providers observations, and pre-referral interventions
_____Formal assessments (including state or district assessments)
_____Results of previous evaluations

Figure 5-58 Example of Customized Print Only Document

CREATE NEW FORMATTED PRINT ONLY AD HOC DOCUMENT

1. Navigate to the **Document Definition** screen.
2. Click Add to create a new document.
3. Enter the following values in the appropriate fields:

Field Name	Value
Customer	USA.AZ
Document	(user defined)
Description	(user defined)
View Order	(user defined)
Document Group	SpEd
Special Document Type	Print Only Formatted
Title to Appear on Printed Report	(user defined)
Ad Hoc	Checked
Report Interface	GENAZPrintOnly (K12.SpecialEd.AZ.Document)

Create Namespace	K12.SpecialEd.AZ.Document
Create Class	GENAZPrintOnly
Extract Data Namespace	K12.SpecialEd.AZ.Document
Extract Data Container	GENAZPrintOnly

Table 10 New Print Only Document Values

4. Click 

.

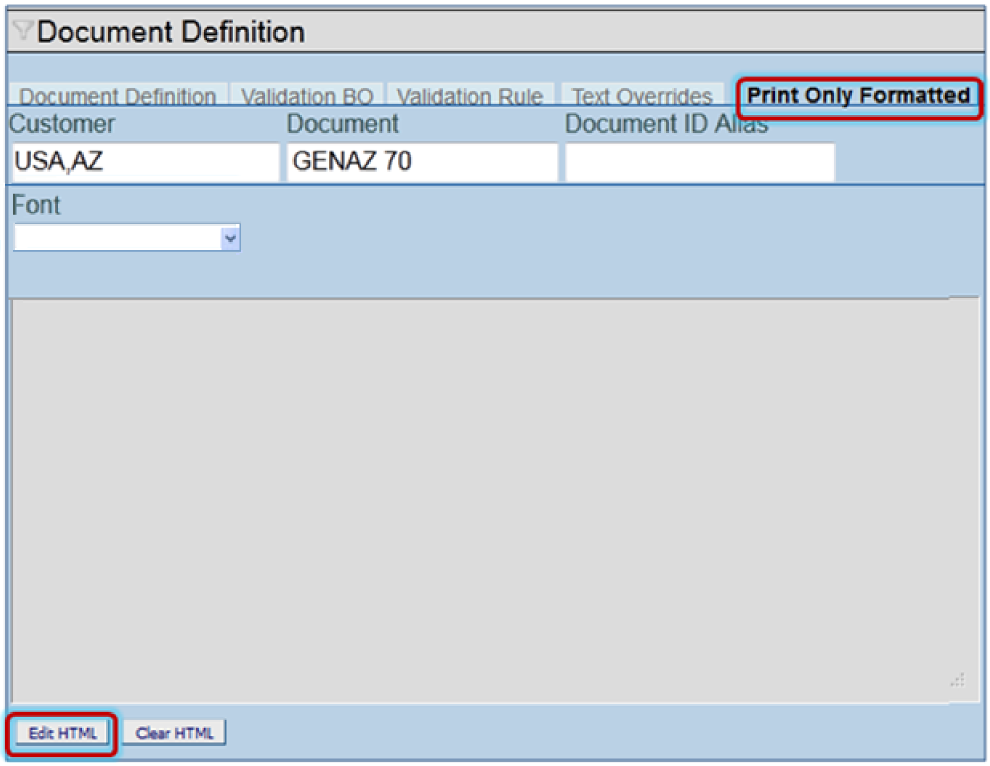


Figure 5-59 Document Definition Screen Print Only Formatted Tab

5. Click the **Print Only Formatted** tab.

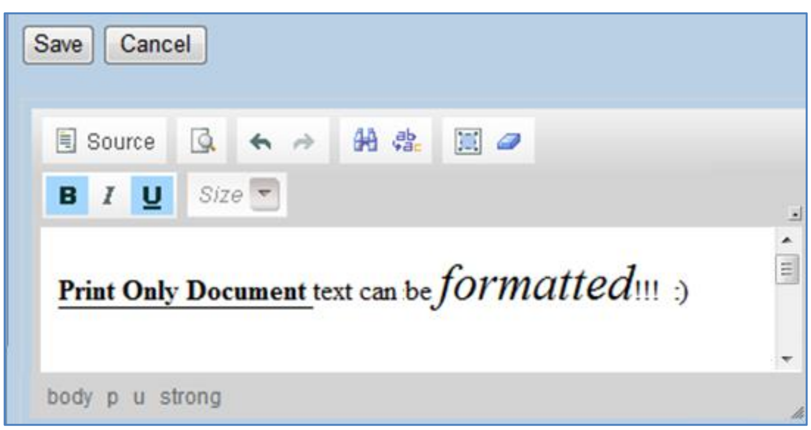


Figure 5-60 Edit HTML Report Body Screen Formatting Features

6. Click **Edit HTML** The Edit HTML Report Body screen opens.
7. Add text and format using the Style buttons.
8. Click 

. The new formatted, Print Only document is available in Ad Hoc Documents

SPECIAL ED SERVICE

The Special Ed Service screen contains the following components:

- **Description**
  The name or label given to the service.

- **Type**
  The type or category of the service.

- **Inactive Date**
  To remove a service, it is recommended that the service be Inactivated. This will cause the service to not appear on new IEP's.

- **Medicaid Eligible**
  This checkbox designates the service to be Medicaid Billable. The hours will be calculated in the services section of the IEP. The services and hours will be displayed on the Consent to Claim Medicaid Reimbursement that will print with the IEP document.

NAVIGATE TO THE SPECIAL ED SERVICE SCREEN

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

Figure 5-61 Synergy Tree Button

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **Special Education** or pointing right next to it. The triangle will turn green and point downward

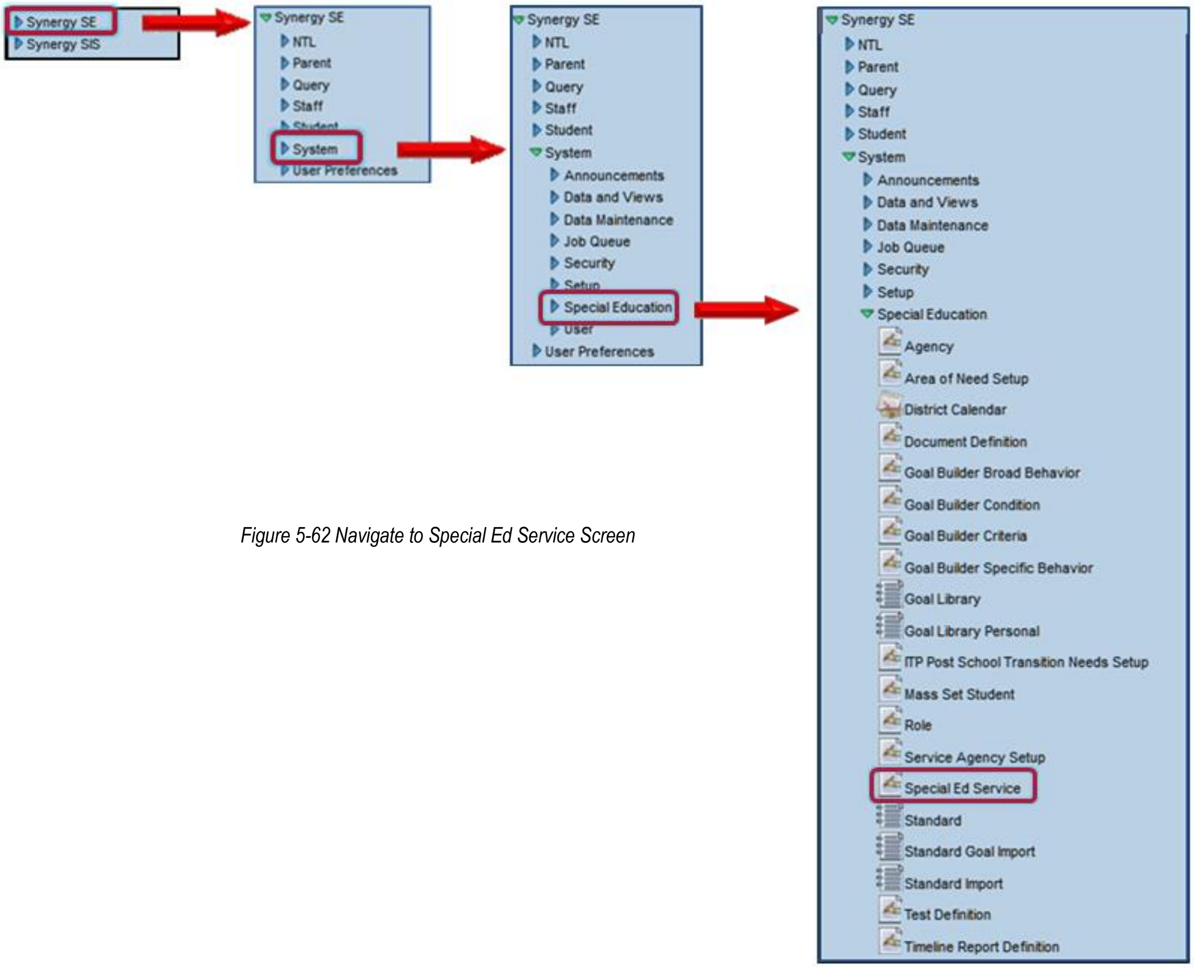


Figure 5-62 Navigate to Special Ed Service Screen

5. Click on the name **Special Ed Service.** The Special Ed Service screen opens.

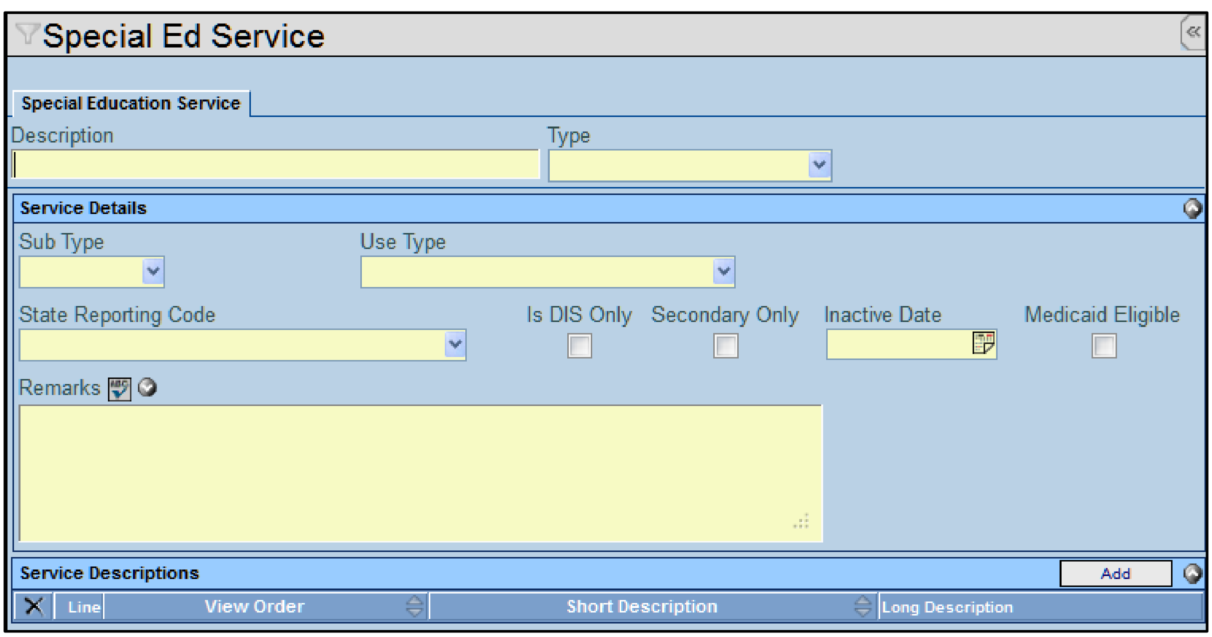
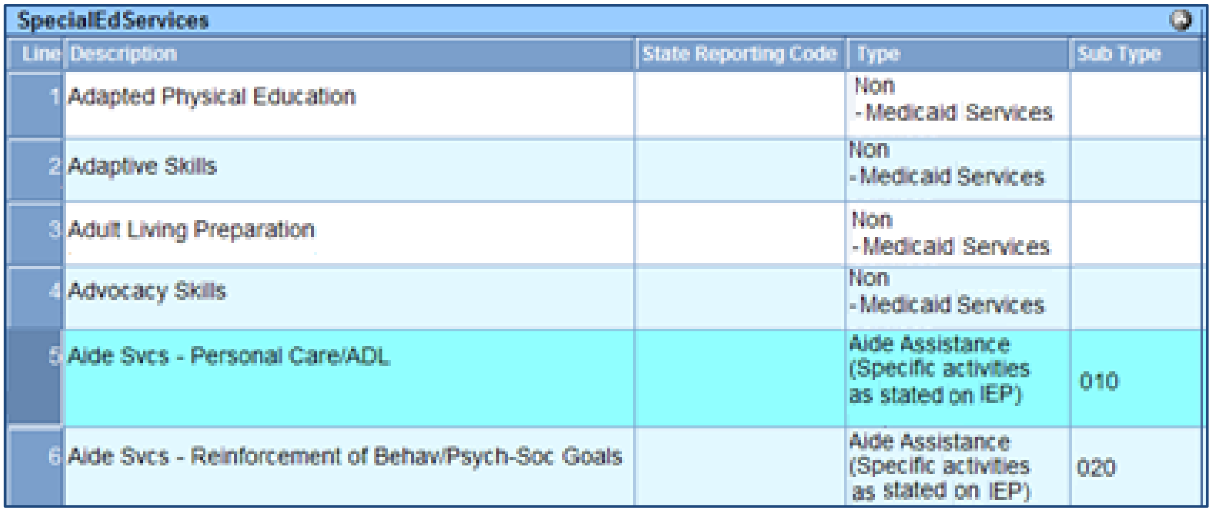


Figure 5-63 Special Ed Service Screen

Access Special Ed Services

1. To view the current list of Special Ed Services, click Find. The list displays in a new window.
2. Click on the row of the desired service to view. The row highlights



Line	Description	State Reporting Code	Type	Sub Type
1	Adapted Physical Education		Non -Medicaid Services	
2	Adaptive Skills		Non -Medicaid Services	
3	Adult Living Preparation		Non -Medicaid Services	
4	Advocacy Skills		Non -Medicaid Services	
5	Aide Svcs - Personal Care/ADL		Aide Assistance (Specific activities as stated on IEP)	010
6	Aide Svcs - Reinforcement of Behav/Psych-Soc Goals		Aide Assistance (Specific activities as stated on IEP)	020

Figure 5-64 Special Ed Services: Find Screen

3. Close the window. The service displays in the Special Ed Service screen.
4. Changes can be made to the **Description** or **Type**.
5. Click Save to save any changes.

Add New Service

1. Click Add. The **Special Ed Service Add** screen displays.
2. Enter the name of the service in **Description.** .

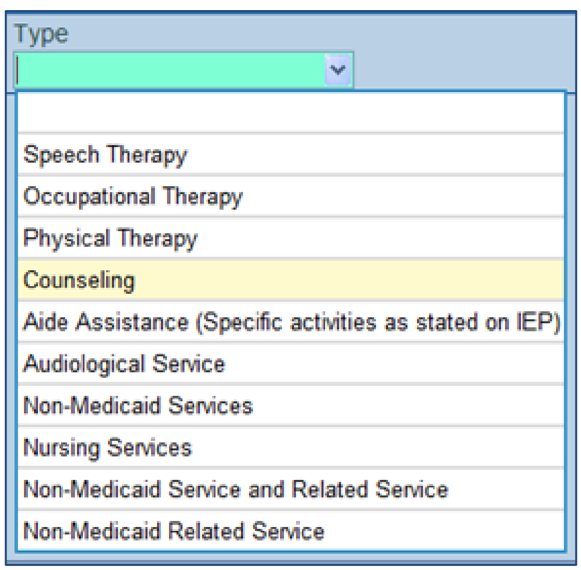


Figure 5-65 Special Ed Service Add Screen Type Drop-down

3. Click **Type** and select.
4. Click the Save. The screen closes and the new service displays.

5. Check **Medicaid Eligible** if the service will be Medicaid billable.
6. Click Save. The new service is available in the IEP document.

DELETE A SERVICE

It is *not* recommended to delete a service. Use the Inactive Date feature. This will ensure that current documents are not affected and that the inactive service is not available on new IEP documents created after the entered date.

7. Enter **Inactive Date (**MMDDYY) or click and select date.
8. Click Save.

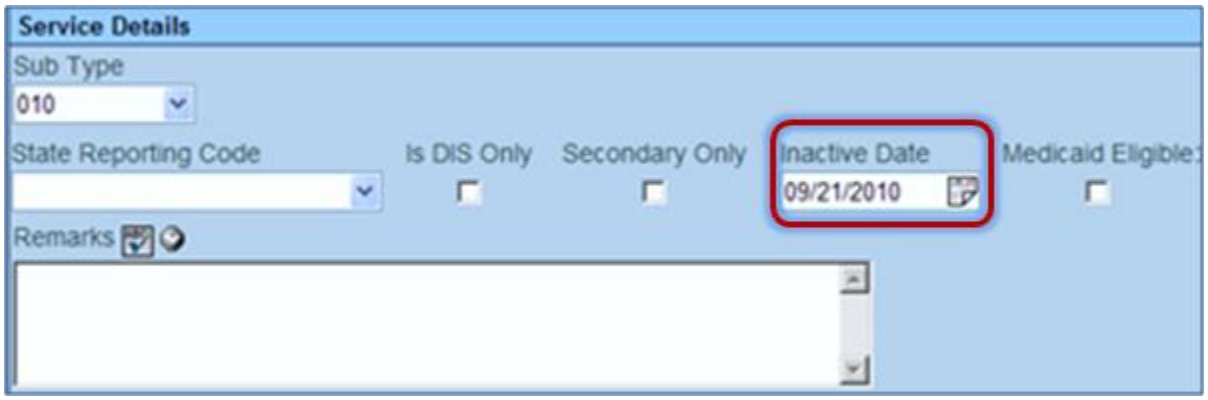


Figure 5-66 Special Ed Services Screen Service Details Grid

LOOKUP TABLE DEFINITION

Many views in Synergy SE have drop-down lists where the user can select a standard value for the field instead of typing the value. This produces more consistent and accurate data entry, as well at the ability to query consistent data for reports. Each drop-down list has its own lookup table. While some tables are "Product-Owned" and cannot be changed, many tables can be edited to match the individual district's specifications.

NAVIGATE TO LOOKUP TABLE DEFINITION SCREEN

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

Figure 5-67 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Click on the name **Setup** or pointing right next to it. The triangle will turn green and point downward.

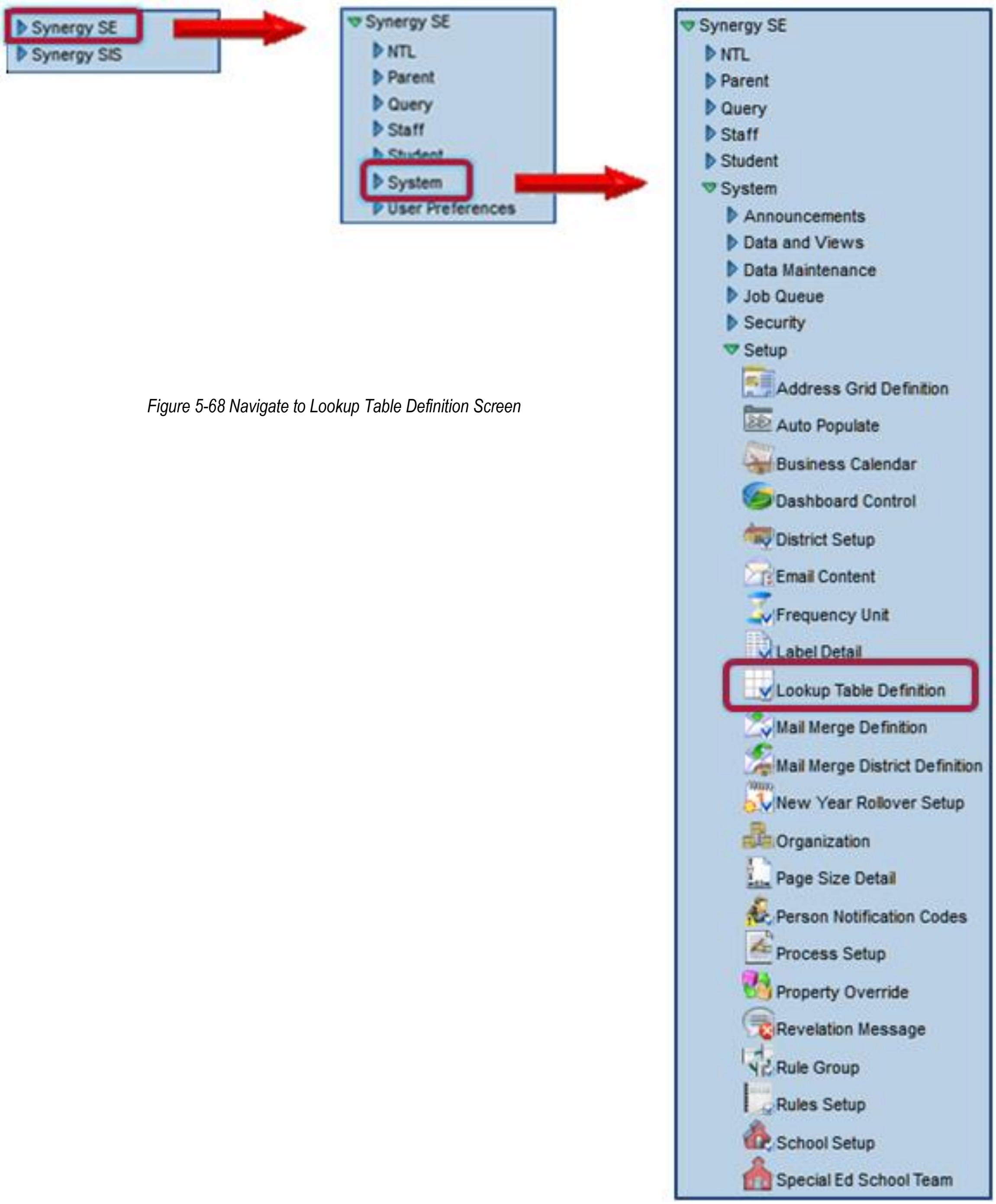


Figure 5-68 Navigate to Lookup Table Definition Screen

5. Click on the name **Lookup Table Definition.** The Lookup Table Definition screen displays

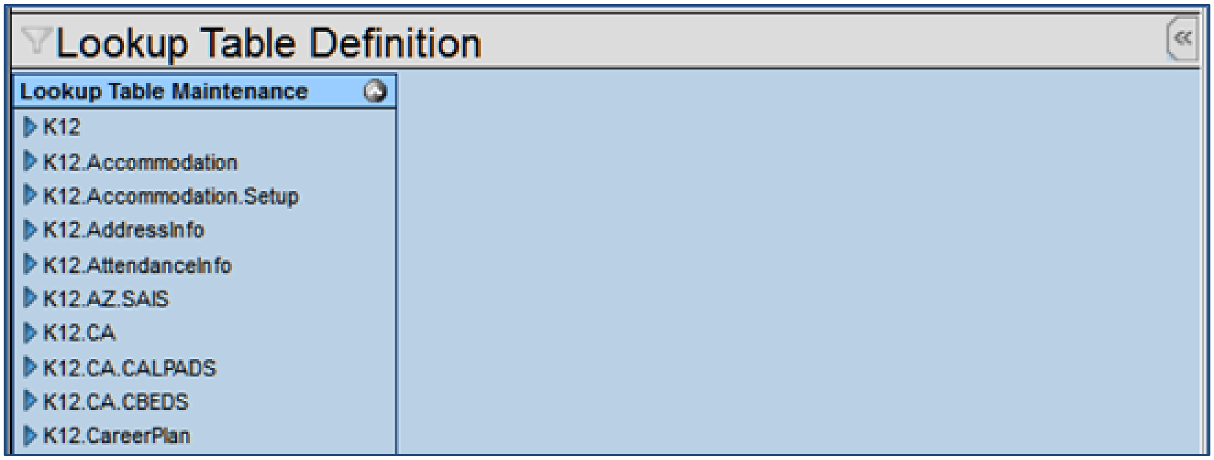


Figure 5-69 Lookup Table Definition Screen

1. Find the table by clicking on the triangles next to each node.

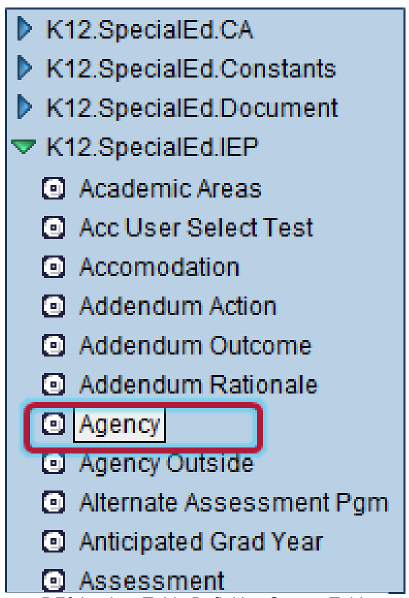
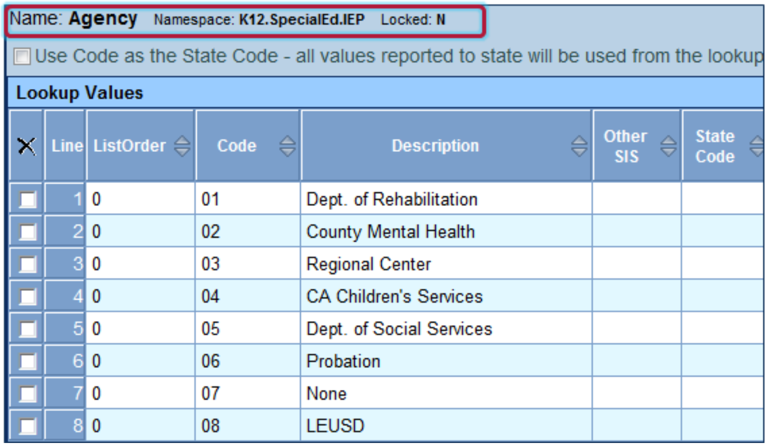


Figure 5-70 Lookup Table Definition Screen Tables

2. Once the triangle of a node has been clicked, a list of the lookup tables associated with that node (or business object) appears underneath the node. To see the values in the lookup table, click on the table name. If necessary, scroll back up the screen to view the table.


Name: **Agency** Namespace: **K12.SpecialEd.IEP** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup

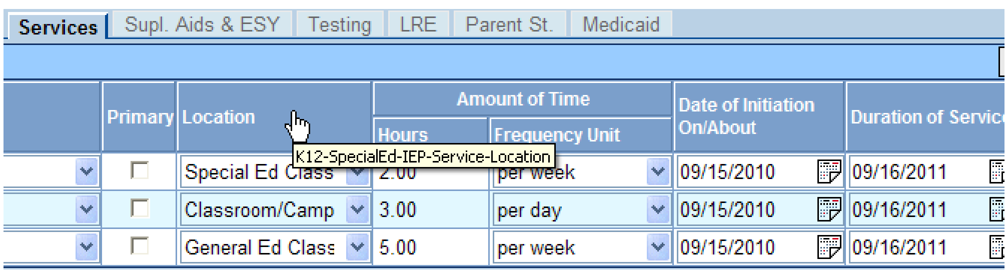
Lookup Values

Line	ListOrder	Code	Description	Other SIS	State Code
1	0	01	Dept. of Rehabilitation		
2	0	02	County Mental Health		
3	0	03	Regional Center		
4	0	04	CA Children's Services		
5	0	05	Dept. of Social Services		
6	0	06	Probation		
7	0	07	None		
8	0	08	LEUSD		

Figure 5-71 LookupTable Definition Screen Table Value

Locating a Lookup Table

1. To discover the name of a lookup table on a screen, navigate to the document screen and hover the mouse over the drop-down list. A box pops up with the name of the table. This functionality is referred to as *show BO on mouseover.* See: User Special Ed Settings.



	Primary	Location	Amount of Time: Hours	Amount of Time: Frequency Unit	Date of Initiation On/About	Duration of Servic
		Special Ed Class	2.00	per week	09/15/2010	09/16/2011
		Classroom/Camp	3.00	per day	09/15/2010	09/16/2011
		General Ed Class	5.00	per week	09/15/2010	09/16/2011

Figure 5-72 IEP Screen Services Tab

The Business Object (BO) in this example indicates that the Lookup table name is *K12-SpecialEd-IEP-Service-Location.*

2. Navigate to the **Lookup Table** screen.
3. Locate the **Lookup Table** from the list.

Figure 5-73 LookupTable Definition Screen List of Values

4. Click on the **Lookup Table Name**.
5. Scroll back up to the top of the screen, if necessary to see the Lookup Values grid. The **Service Location Descriptions** can be added to, edited, deleted or inactivated.
6. The **Status** column allows the inactivation for specific school years. By selecting a school year in the **Year End** drop-down, the specific Lookup Description will not be available after that year.

Name: **Service Location** Namespace: **K12.SpecialEd.IEP** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
1	1	01	Special Ed Classroom						
2	2	02	General Ed Classroom						
3	3	03	General/Special Ed Classroom						
4	4	07	Special School						
5	5	09	Classroom/Campus						
6	6	04	Playground						
7	7	05	Resource Room						
8	8	06	Speech Room						
9	9	08	Community						
10	10	10	Therapy Regional Center						
11	11	11	Audiology Offices						
12	12	12	Campus/Community						
13	13	13	Regional Center/Campus						
14	14	14	Homebound						
15	15	15	Health Office						

Figure 5-74 Lookup Table Definition Screen Service Location Grid

STUDENT DOCUMENT UNLOCK

The ability to unlock and edit any non-Print Only document listed in Document Definition such as a finalized IEP or a finalized MET is available. This allows users with the appropriate security to make corrections to the most recent Historical document and resave it. This function should be limited to a small number of key individuals within the district.

NAVIGATE TO STUDENT DOCUMENT UNLOCK

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

Figure 5-75 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name Synergy SE or ▷ pointing next to the word. Once clicked, the triangle will turn green ▽ and point downward.
3. Under the Synergy SE folder, click on the name NTL or ▷ pointing right next to it. The triangle will turn green ▽ and point downward.
4. Under the NTL folder, click on the name **Student Document Unlock**. The Student Document Unlock screen opens.

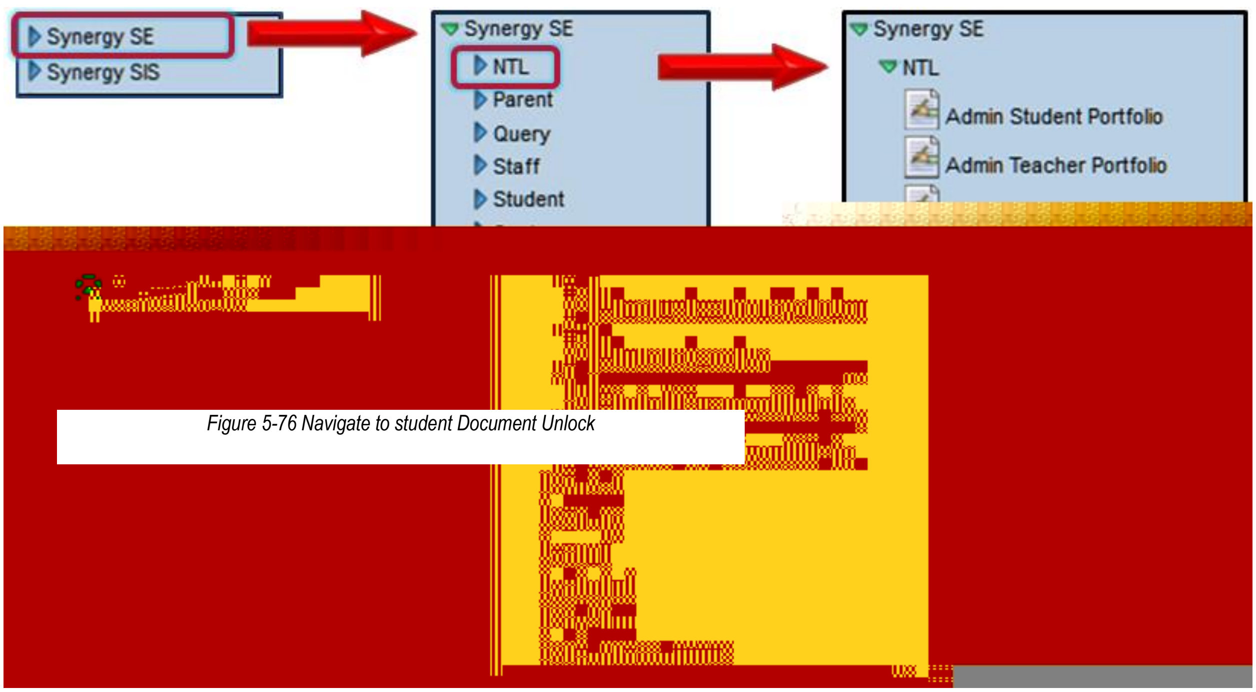


Figure 5-76 Navigate to student Document Unlock

ENABLE STUDENT DOCUMENT UNLOCK FUNCTION

1. Navigate to the Document Definition screen by clicking on the **Tree** button.

Figure 5-77 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or ▷ pointing next to the word. Once clicked, the triangle will turn green ▽ and point downward.
3. Under the Synergy SE folder, click on the name **System** or ▷ pointing right next to it. The triangle will turn green ▽ and point downward.
4. Under the System folder, click on the name **Special Education** or ▷ pointing right next to it. The triangle will turn green ▽ and point downward
5. Click on the name **Document Definition.** The Document Definition screen opens.

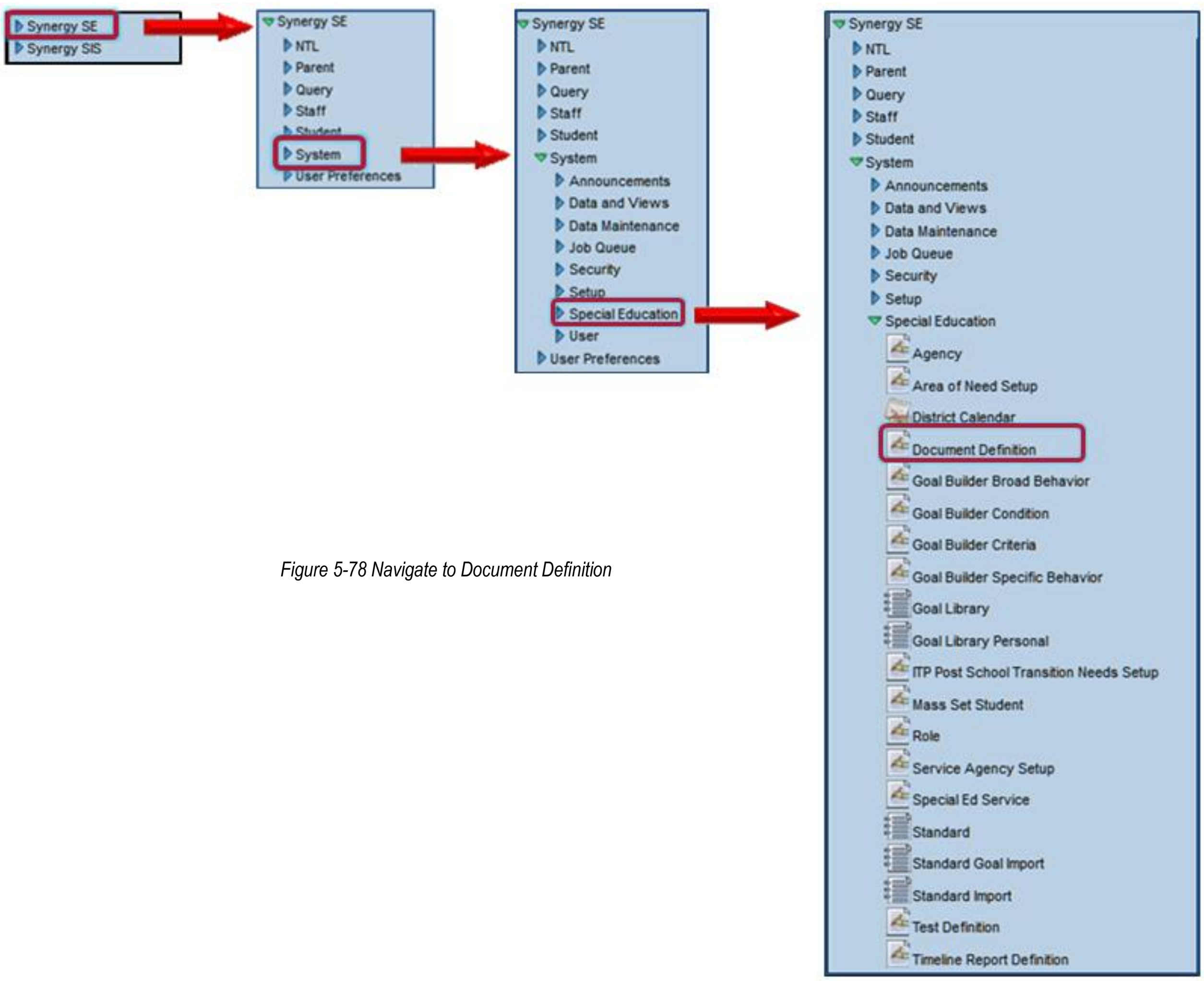


Figure 5-78 Navigate to Document Definition

6. Click Find. Document Definition: Find Result screen opens.
7. Double-click the line of the desired **Document**. The screen closes and selected document displays on the Document Definition screen.
8. On the Document Definition tab, check **Document can be unlocked.**
9. Click Save.

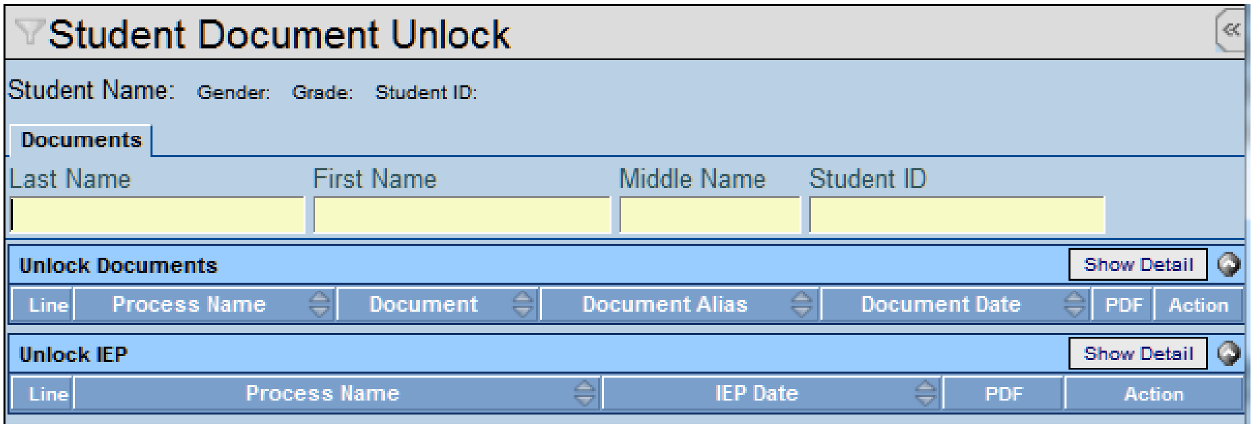


Figure 5-79 Student Document Unlock Screen

UNLOCK DOCUMENT

1. Enter student **Name** and **Student ID** number.
2. Click Find.

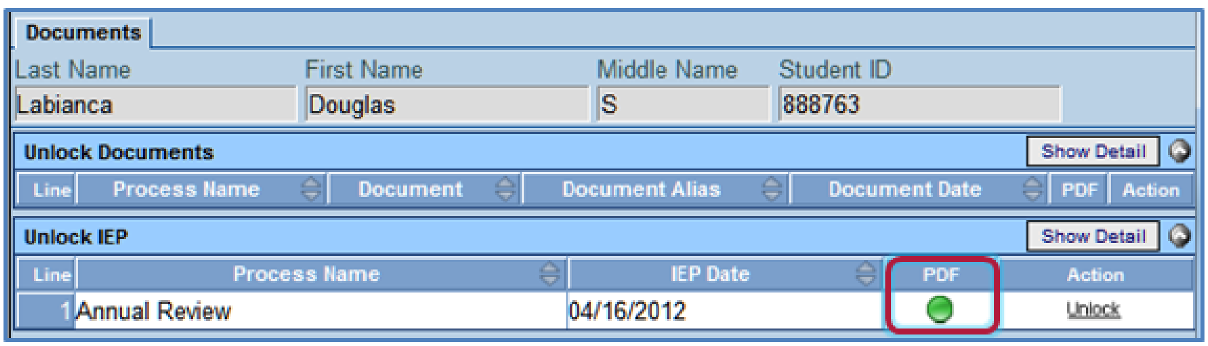


Figure 5-80 Student Document Unlock Screen Available Documentt Unlock

3. If student has a finalized document available for editing, it displays in the Unlock Documents or Unlock IEP grids. It displays, initially, with a green dot in the PDF column

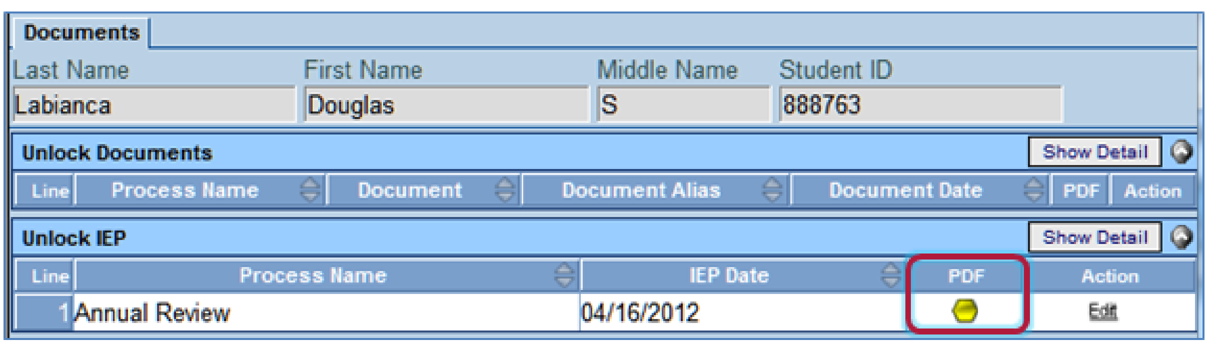


Figure 5-81 Student Document Unlock Screen Available Document Edit

4. Click Unlock in the Action column, the dot will turn yellow and the Action becomes Edit.
5. Click on Edit. A confirmation message displays.

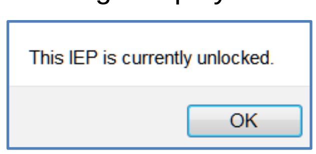


Figure 5-82 Confirmation Message

6. Click **OK.** The document is now available for editing in the student's Historical documents.

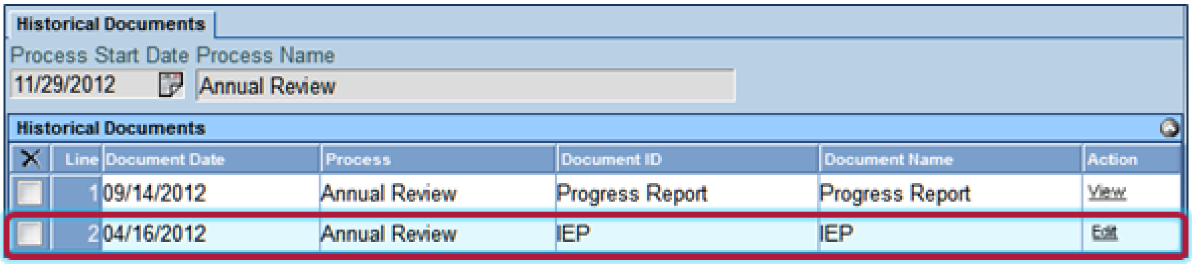


Figure 5-83 SE Student Historical Documents Tab

8. When finished, click Finalize. A confirmation message displays.
9. Click **OK.** The document will process and display the completed PDF.

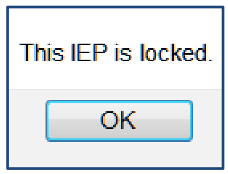


Figure 5-84 Confirmation Message

The newly edited version will now be accessible in Historical Documents tab and via the Current IEP Button, as well as IEPs in Student Document Unlock.

Security Considerations

This functionality can be secured from End Users, if desired. See: Security for Student Document Unlock.

TRANSLATION

The Translation screen enables document translation into various supported languages. Use this screen to perform the initial translation of labels, data fields, screens, reports and/or processes.

NAVIGATE TO THE TRANSLATION SCREEN

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

Figure 5-85 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **Setup** or pointing right next to it. The triangle will turn green and point downward.

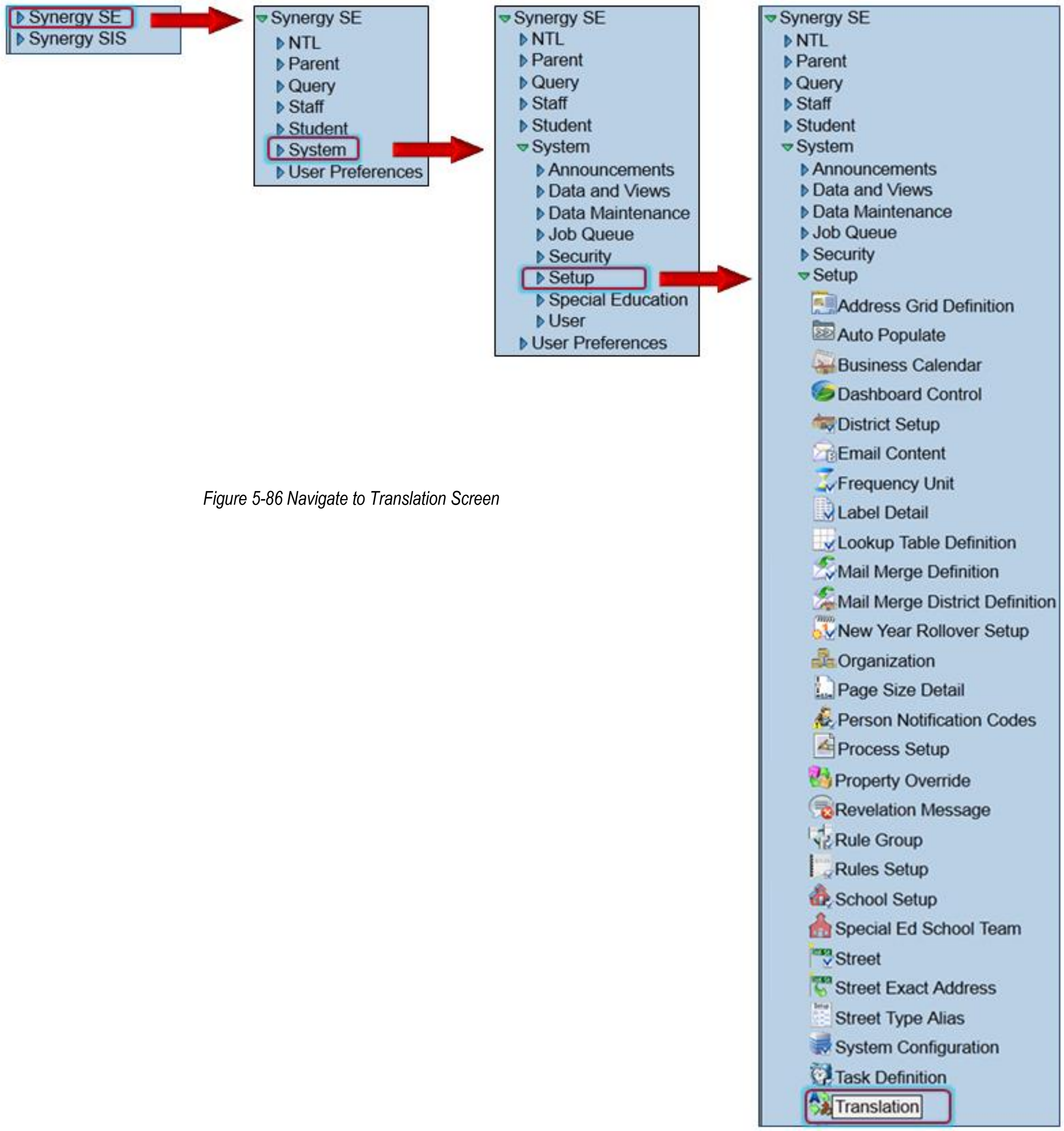


Figure 5-86 Navigate to Translation Screen

5. Click on the name **Translation.** The Translation screen opens

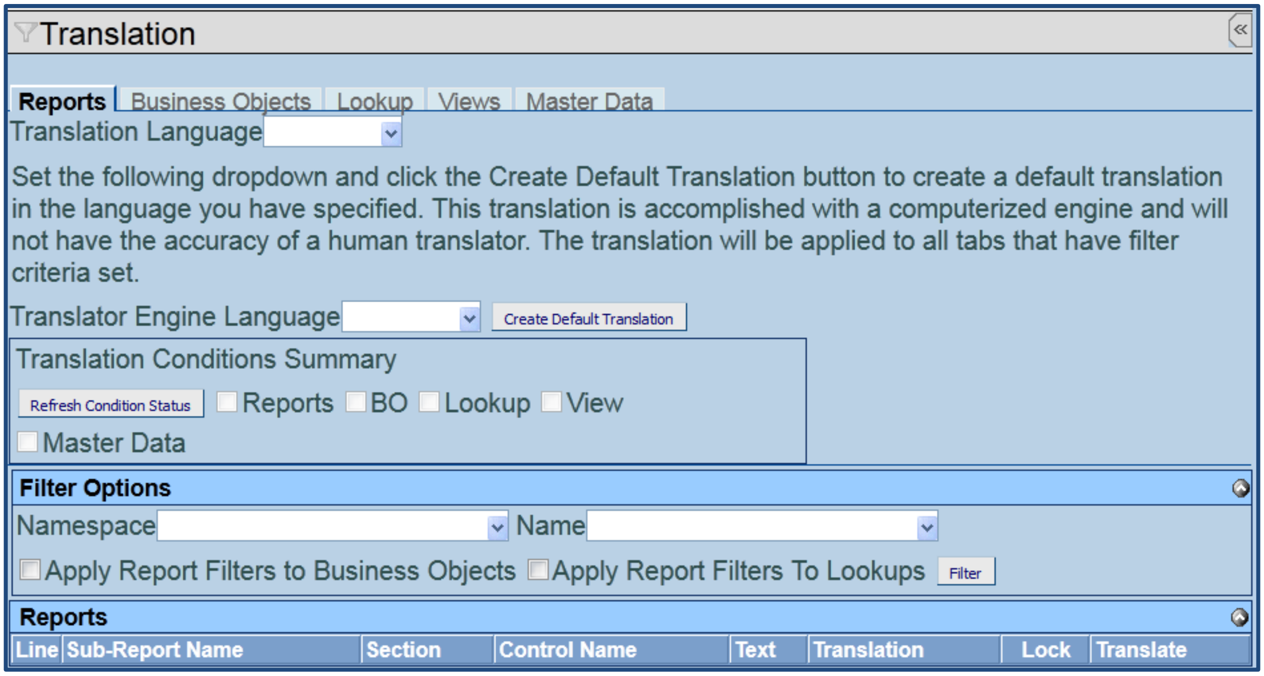


Figure 5-87 Translation Screen

REPORTS TAB SETUP

1. Select the **Reports** tab.
2. Click **Translation Language** and specify the desired translation language. The Translator Engine Language will match it by default.
3. Click **Namespace** and **Name** s and select.
4. Click Filter.
5. Click Create Default Translation to translate all lines simultaneously

   OR

   Click Translate at the far right on an individual line to translate that line, only.
6. The translations may take several seconds to load. Click if necessary, to display the new translations.

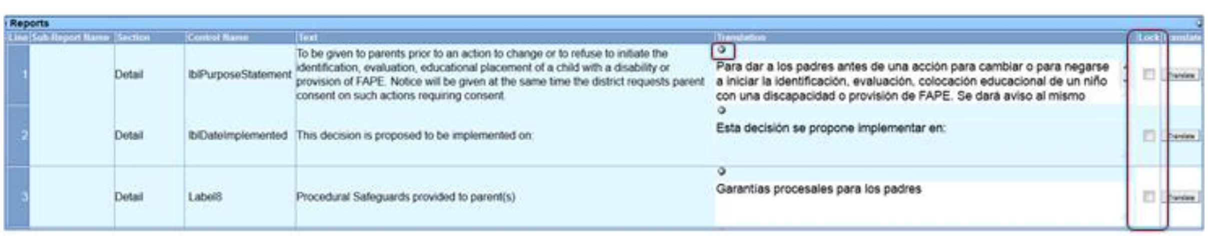


Figure 5-88 Translation Screen Reports Grid

7. Review for appropriate translation, considering local usage. Click to expand the Translation text field to expose the full entry.
8. Edit as necessary.
9. When satisfied with all translation, check **Lock** on each line**.**

10. Click Save. The text entered reverts to a read-only format. Should additional changes be necessary, uncheck **Lock** and it will again become editable.

MASTER DATA SETUP

1. Select the **Master Data** tab.
2. Click **Filter Group, Namespace** and **Name** s and select. The **Document Definition** becomes available.

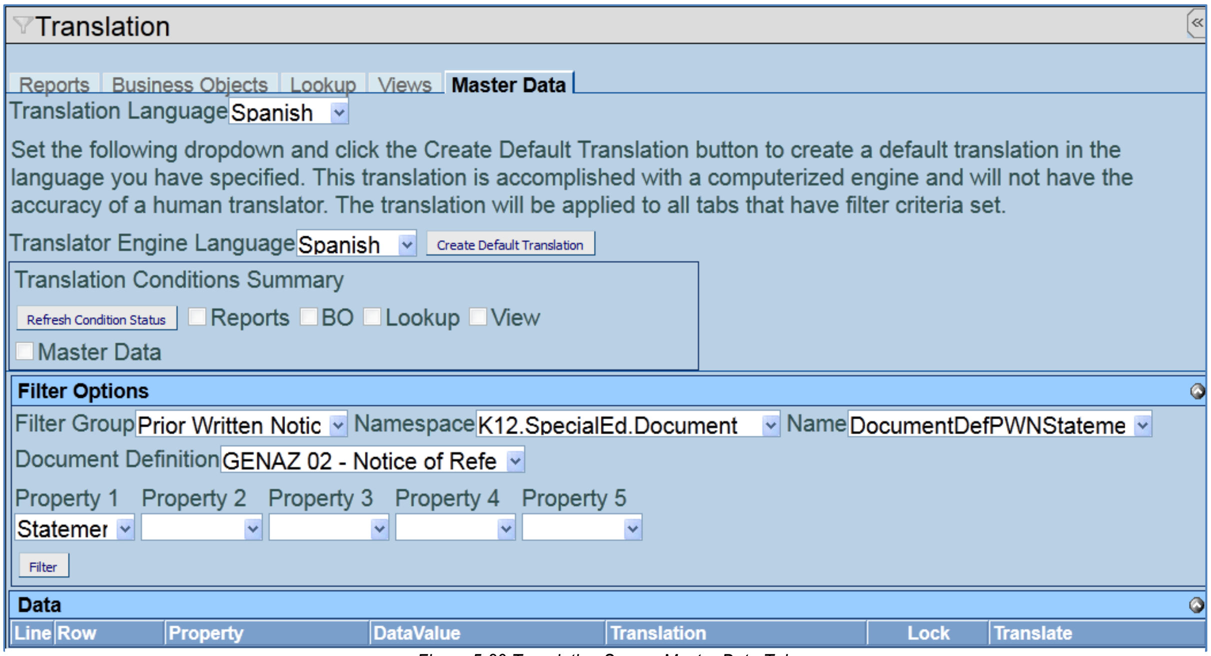


Figure 5-89 Translation Screen Master Data Tab

3. Click **Document Definition** and select desired **Notice** to be translated**.**
4. In the Property 1 field, select **StatementText.**
5. Click Create Default Translation.
6. Click Filter.
7. Edit as necessary.
8. When satisfied with all translation, check **Lock** on each line**.**
9. Click Save. The text entered reverts to a read-only format. Should additional changes be necessary, uncheck Lock and it will again become editable.

TRANSLATE STUDENT DOCUMENTS

1. Navigate to **Synergy SE>Student >Student Translation Documents**.
2. Locate the student whose document is to be translated. Original Document Groups will display Processes for the Student. Finalized Documents will be within the Folder icon.

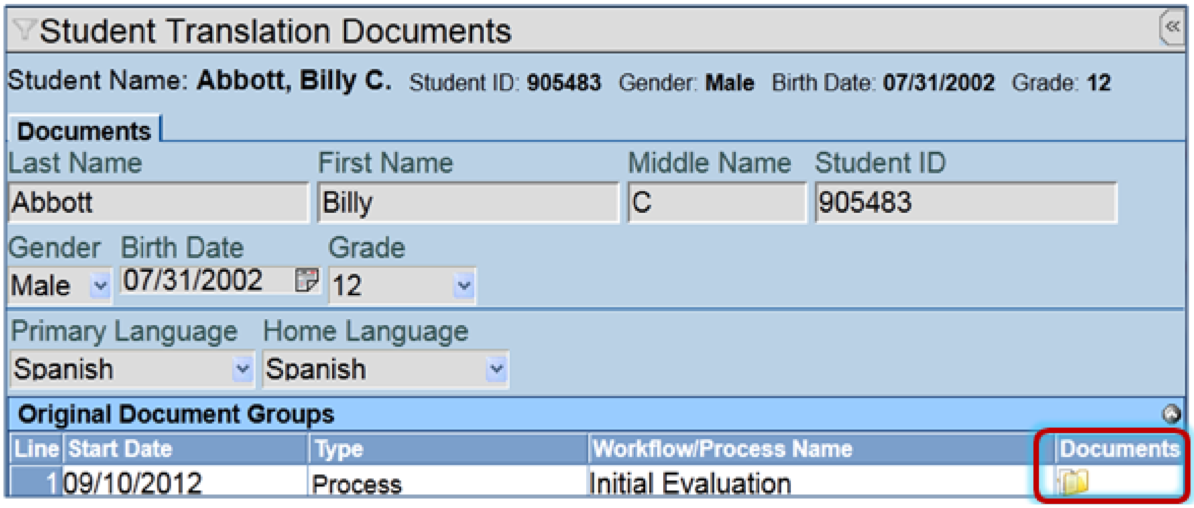


Figure 5-90 Student Translation Documents Screen

3. Click the **Folder** icon. The Translation Documents screen opens displaying all included documents in the folder.

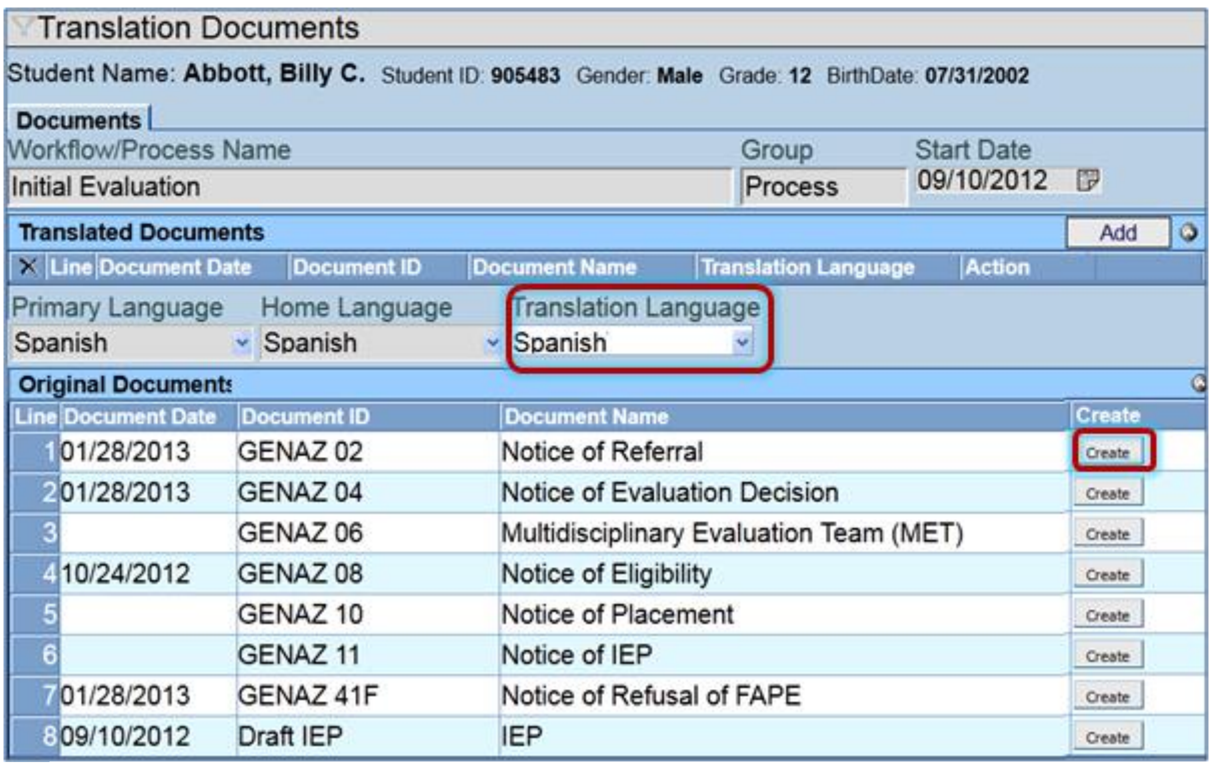


Figure 5-91 Translation Documents Screen

4. Select from the **Translation Language** The documents available for translation in that language display on the Original Documents grid

5. Click Create on the line of the desired document. It will display in the Translated Documents Grid.

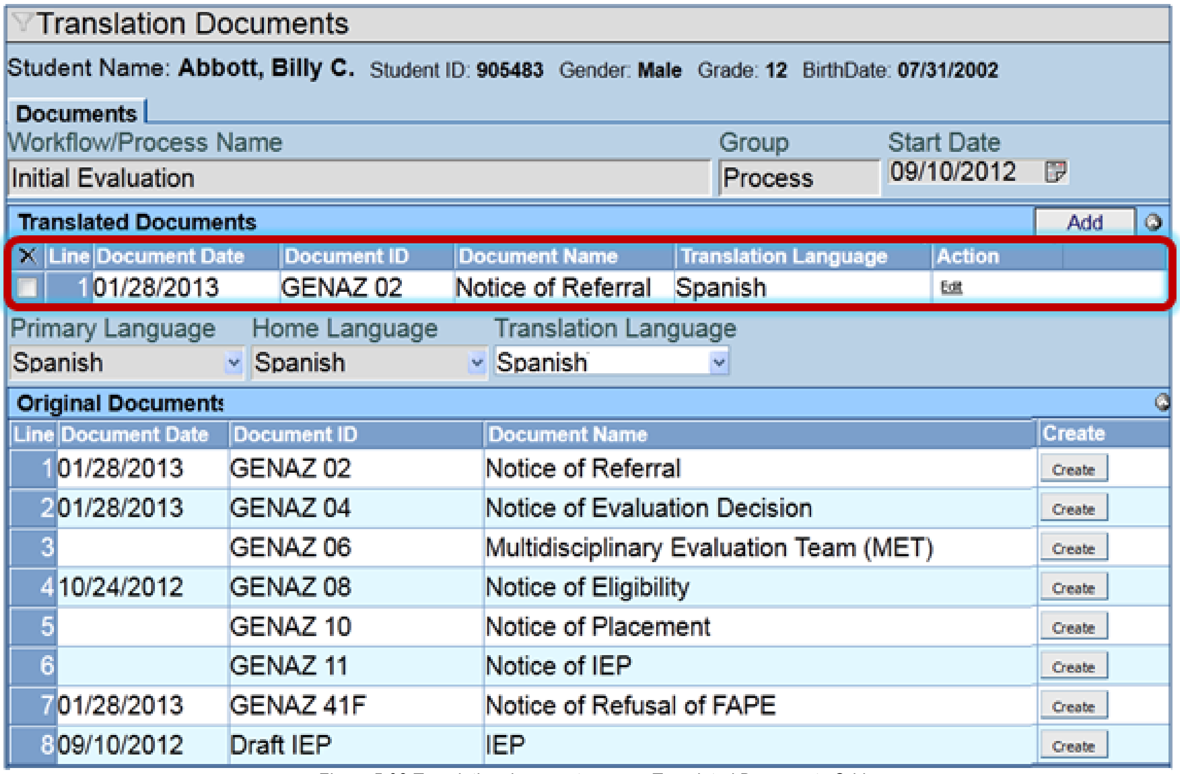


Figure 5-92 Translation documents screen Translated Documents Grid

6. Click Edit in the Action column.

The document screen opens in its original (English) version with the translated language name in parenthesis behind the title.

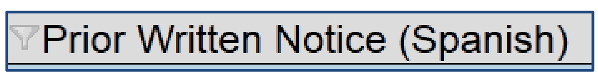


Figure 5-93 Prior Written Notice Screen Title (Spanish)

7. Edit as appropriate.
8. Click Save when finished.
9. Click Print Preview to view the translated document.

Translated Text Displayed In Print Preview – English/Spanish Versions

To be given to parents prior to an action to change or to refuse to initiate the identification, evaluation, educational placement of a child with a disability or provision of FAPE. Notice will be given at the same time the district requests parent consent on such actions requiring consent.

DESCRIPTION OF ACTIONS PROPOSED OR REFUSED BY THE DISTRICT: Identification
The evaluation team has received a referral for a possible comprehensive evaluation of your child.

Para dar a los padres antes de una acción para cambiar o para negarse a iniciar la identificación, evaluación, colocación educacional de un niño con una discapacidad o provisión de FAPE. Se dará aviso al mismo tiempo el distrito pide consentimiento en tales acciones, requiere el consentimiento de los padres.

DESCRIPCIÓN DE LAS ACCIONES PROPUESTAS O RECHAZADA POR EL DISTRITO: Identificación
El equipo de evaluación ha recibido una remisión para una posible evaluación integral de su hijo.

Figure 5-94 Printed Example Prior Written Notice English/Spanish Versions

TRANSLATION IMPORT EXPORT

Use the Translation Import Export screen to import a language pack or export current translations to share with a partnered district. This screen lists all the defined languages in Synergy.

NAVIGATE TO TRANSLATION IMPORT EXPORT SCREEN

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

Figure 5-95 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.

4. Under the System folder, click on the name **Setup** or pointing right next to it. The triangle will turn green and point downward.

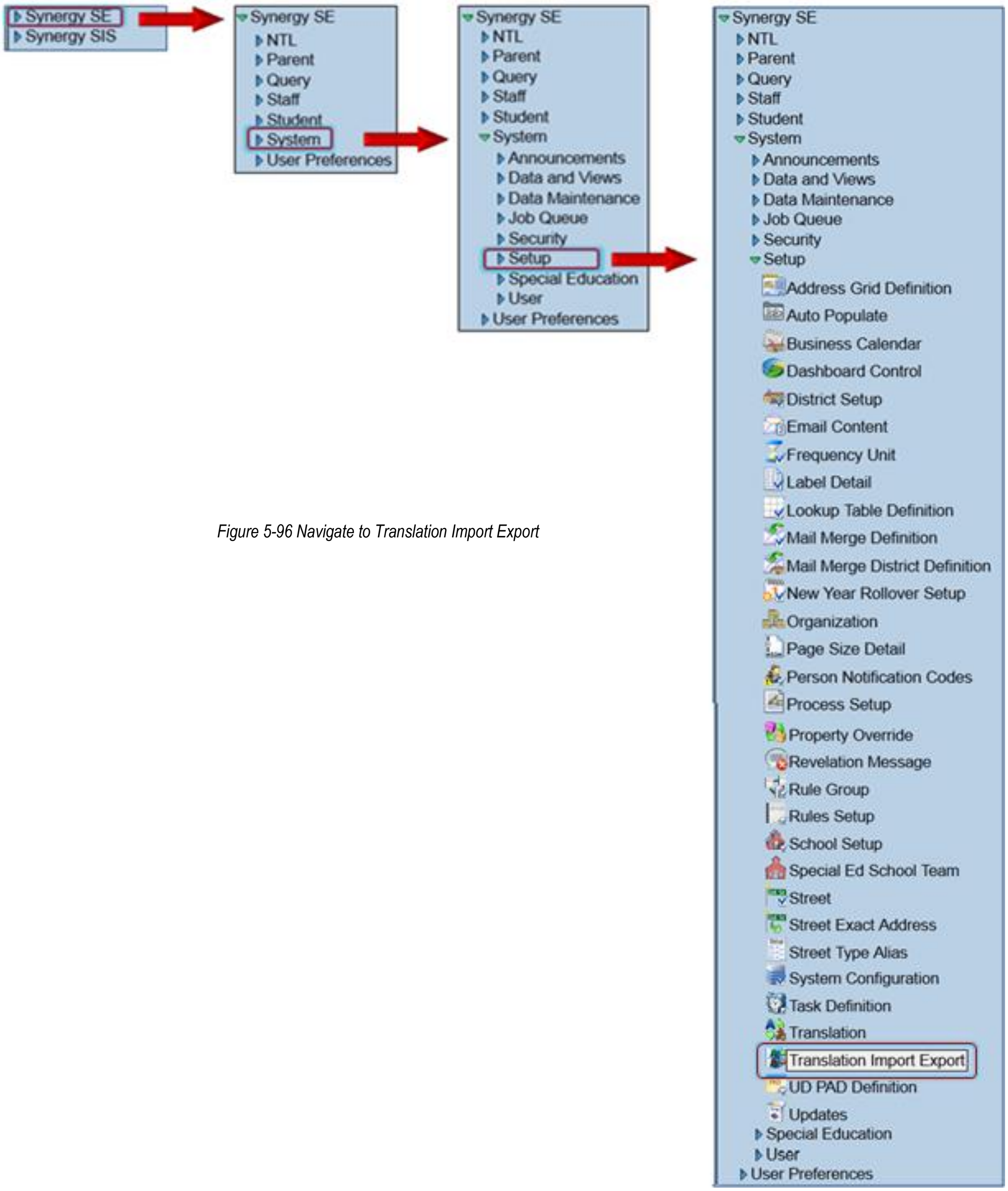


Figure 5-96 Navigate to Translation Import Export

5. Click on the name **Translation Import Export.** The Translation Import Export screen opens

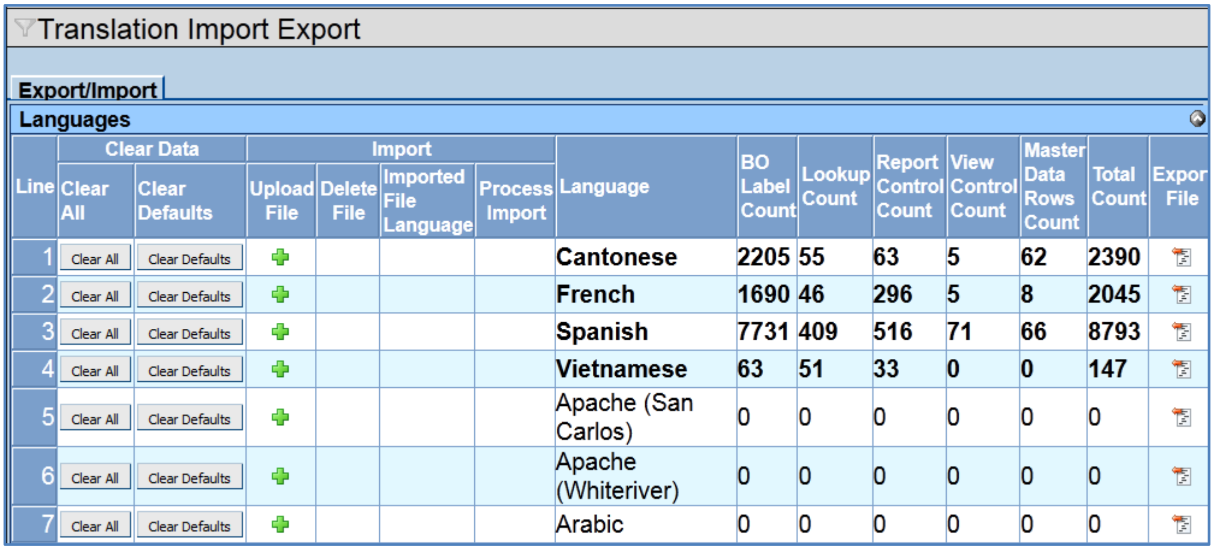


Figure 5-97 Translation Import Export Screen

IMPORT A LANGUAGE PACK

1. Click on line of desired language pack to import. Import Translation screen opens.

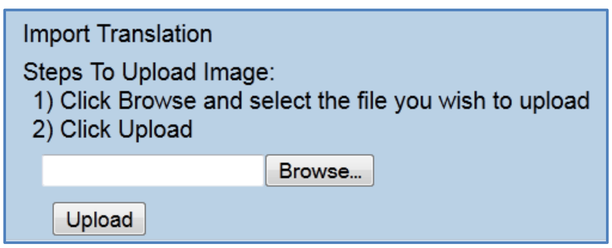


Figure 5-98 Import Translation Screen

2. Click Browse... to locate language file.
3. Select file. The file name displays in the window.
4. Click Upload. A message displays that the upload was successful. The Delete File, Imported File Language, and Process Import fields display.
5. Click to delete file that was uploaded, if desired.

   OR

   Click to process translations from file that was uploaded.

The Job Status screen displays while the file is processing. The language displays in bolded text toward top of grid. The number and category of translations for the imported language displays.

EXPORT CURRENT TRANSLATIONS

1. Click on the line of the language translation file to export. An XML document opens in the browser.
2. Save as desired.

Chapter Six: ANNUAL GOALS CONFIGURATION

In this chapter, the following topics are covered:

- Area of Need
- Goal Library
- State Standard Goal Import

Area of Need

The Area of Need Setup screen contains the Goal Categories and Sub-Categories that hold the individual Goal statements.

Navigate to the Area of Need Screen

3. Open the Synergy SE Navigation Tree by clicking on the **Tree** button.

Figure 6-1 Synergy Navigation Tree

4. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
5. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
6. Under the System folder, click on the name **Special Education** or pointing right next to it. The triangle will turn green and point downward
7. Click on the name **Area of Need.** The Area of Need screen opens.

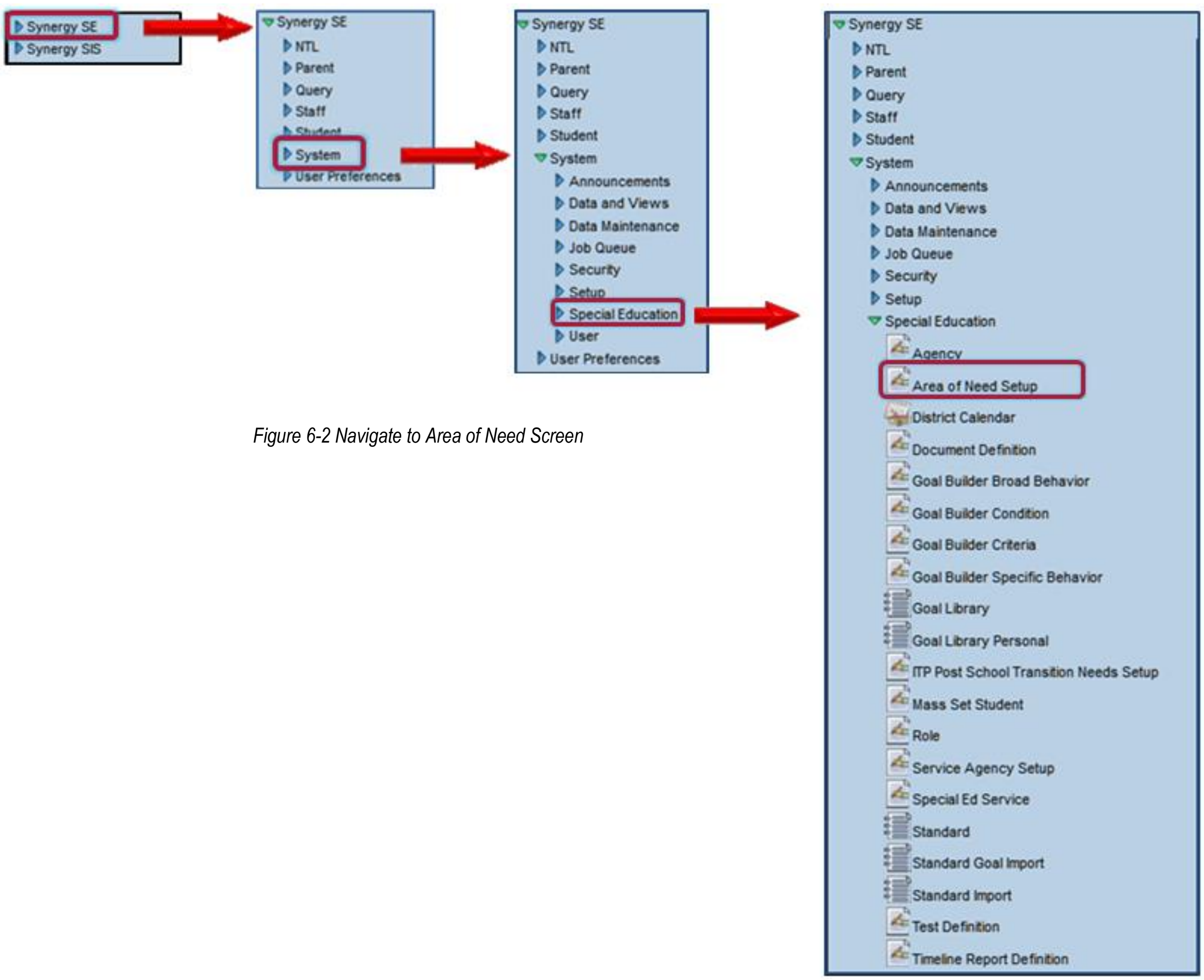


Figure 6-2 Navigate to Area of Need Screen

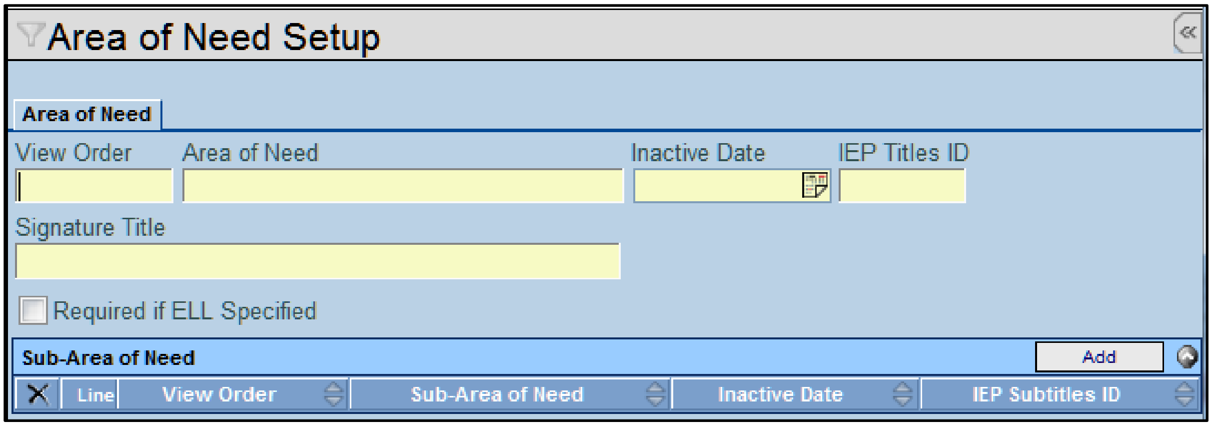


Figure 6-3 Area of Need Setup Screen

View Current Area Of Need Categories

1. Click Find.
2. The list of Area of Need Categories displays in a new screen.

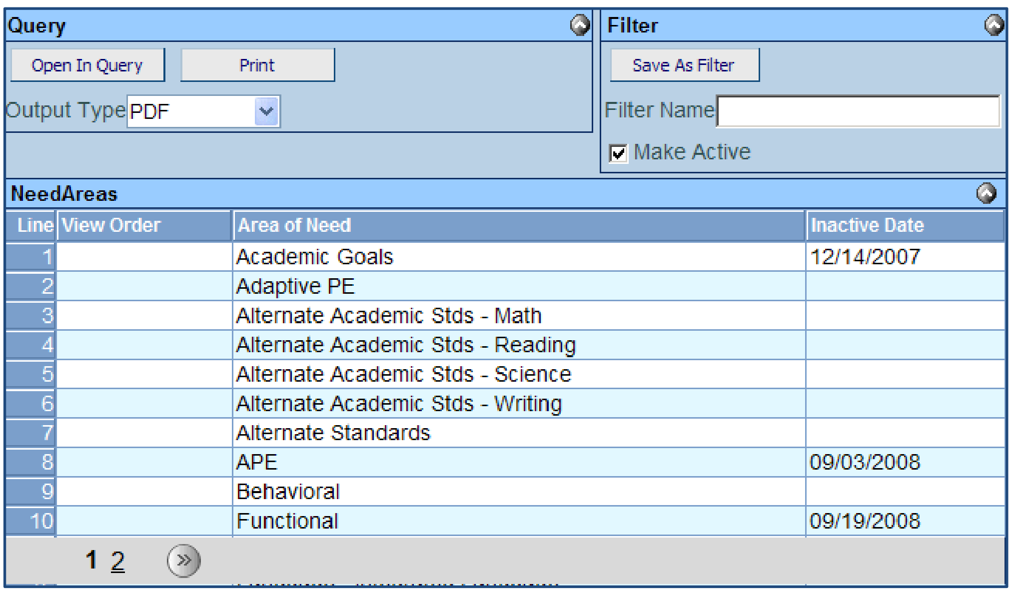


Figure 6-4 Find: Area of Need Screen

3. Double-click the line of an **Area of Need** to display. The screen closes and Area of Need along with the Sub-Area of Need display on the Area of Need Setup screen.

Add New Area of Need Category

1. Click Add at the top of the screen. The **Area of Need Setup Add** screen opens.
2. Enter **View Order** (optional)
3. Enter a title in **Area of Need.**
4. Enter **IEP Titles ID** (optional)
5. Enter **Signature Title** (optional)
6. Check Required if ELL Specified, if appropriate.
7. Click Save at the top of the screen.

8. Click Add on the Sub Area of Need bar to add a Sub-Area of Need
9. Enter **View Order** (optional)
10. Enter Sub Area of Need title.
11. Enter IEP Subtitles ID (optional)
12. Click Save when done or click Close to close the window without saving.

Remove An Area of Need Category

It is recommended to never delete an existing Area of Need Category or Sub-Area of Need Category. Use the **Inactive Date** field instead. By Inactivating the Area of Need it will no longer be available to in any future IEP document.

Inactivate an Area of Need Category

1. Click Find.
2. The list of Area of Need Categories displays in a new screen.
3. Double-click the line of the desired **Area of Need**. The screen closes and Area of Need along with the Sub-Area of Need(s) display on the Area of Need Setup screen.
4. Enter the **Inactive Date (**MMDDYY) or click and select date that the inactivity of the category will take effect.
5. Click Save.
6. If only inactivating certain Sub Area(s) of Need, enter **Inactive Date (**MMDDYY) or click and select date of inactivity on the appropriate line of the Sub Area of Need.
7. Click Save.

Goal Library

The Goal Library contains goal statements that have been created in each of the Area of Need categories. Each goal contains state standards. The existing goal statements can be edited or removed and new goal statements can be added to the Goal Library.

Navigate to the Goal Library Screen

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

Figure 6-5 Synergy Navigation Tree

2. Expand the **Synergy SE** folder by clicking on the name Synergy SE or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **Special Education** or pointing right next to it. The triangle will turn green and point downward
5. Click on the name **Goal Library.** The Goal Library screen opens.

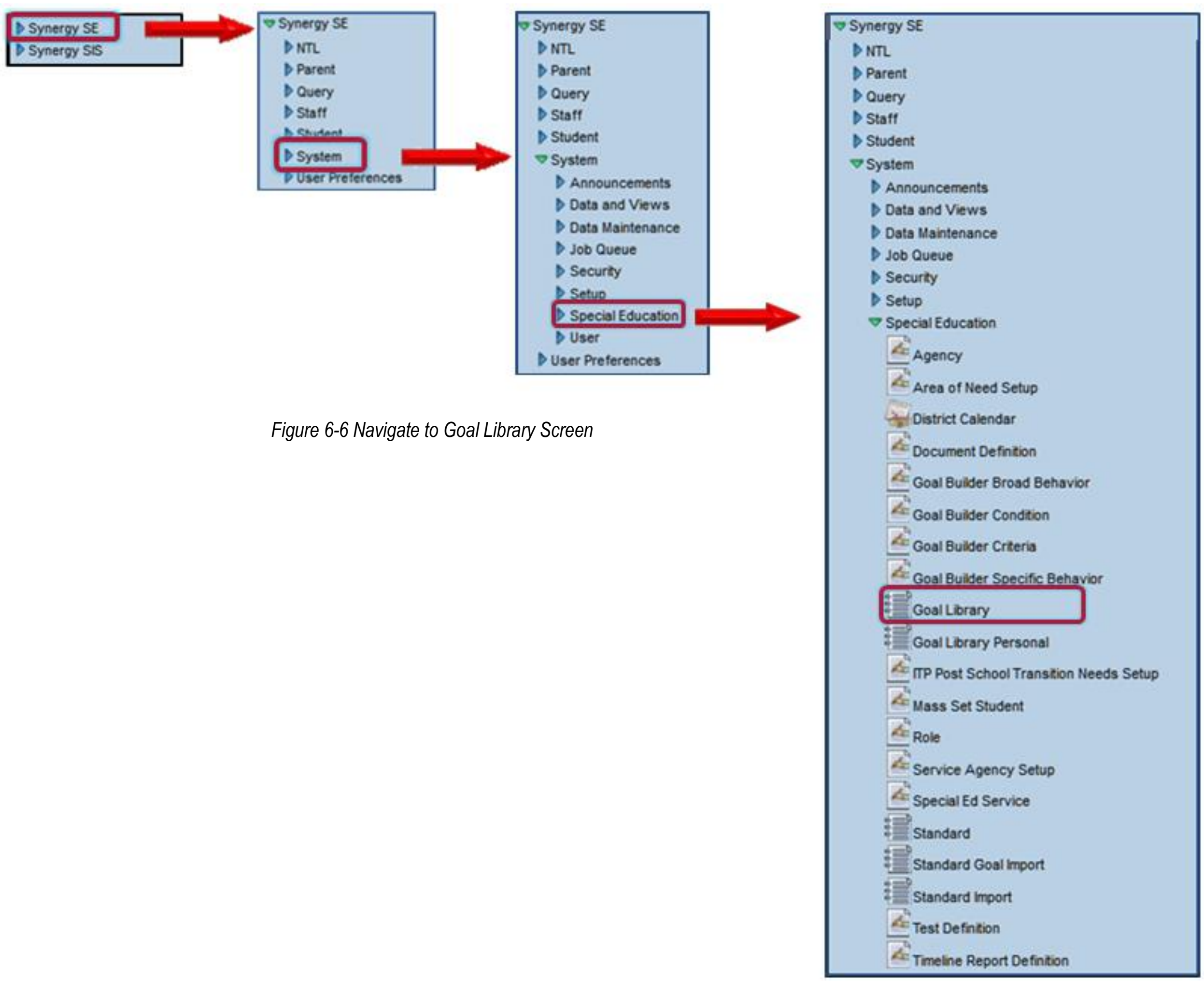


Figure 6-6 Navigate to Goal Library Screen

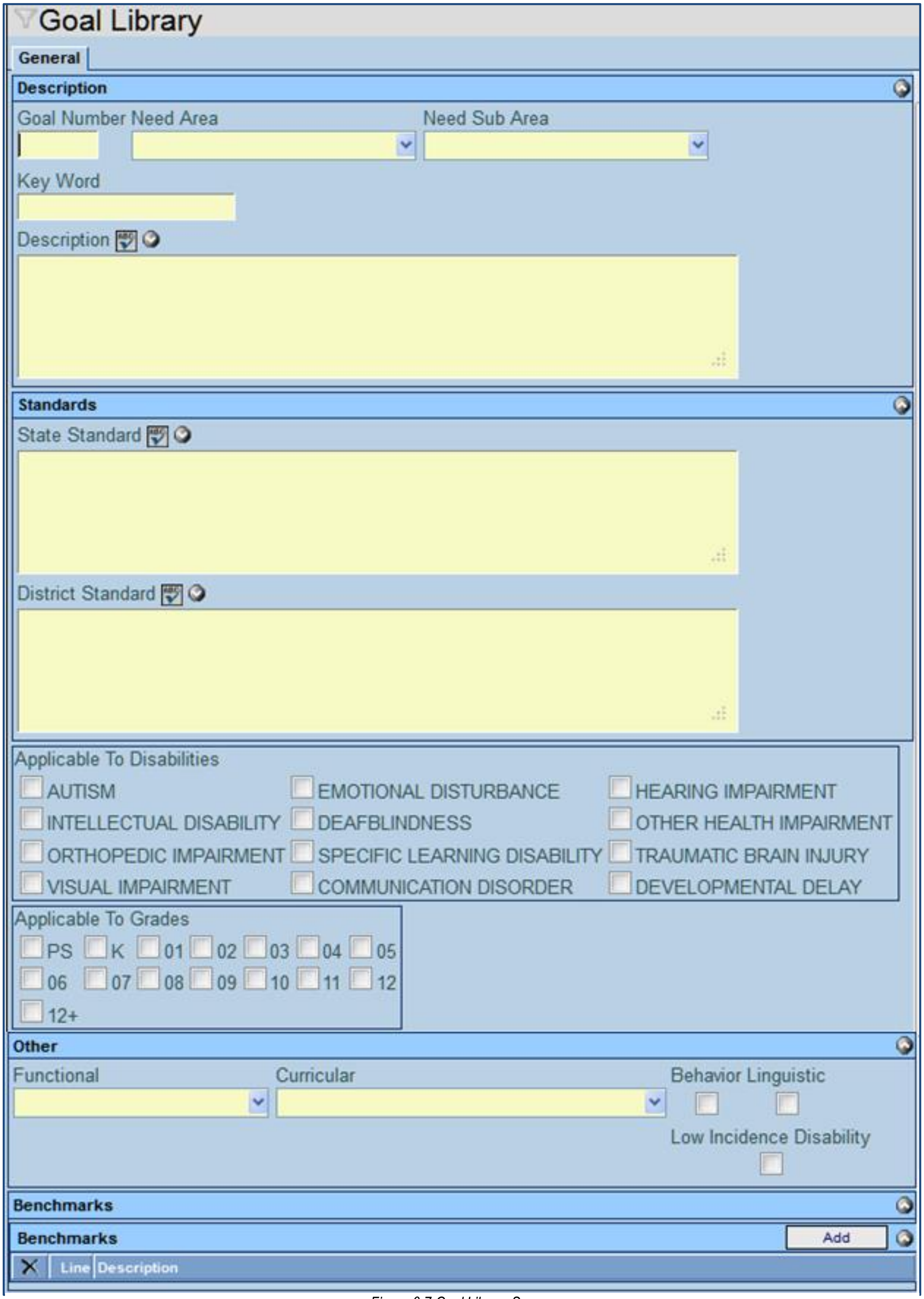


Figure 6-7 Goal Library Screen

The fields that are applicable for **Synergy SE** are

- **Need Area**

  The Area of Need Category that holds the current goal statement.

- **Need Sub Area**

  The Sub Area Category that holds the current goal statement.

- **Description**

  The goal statement that displays on the IEP document.

STATE STANDARD GOAL IMPORT

A district option is available that allows state standards to be imported from Grade Book into Synergy SE. Standards can be aligned with goals. The goal structure in the IEP has been modified to allow locating goals by selecting Grade and Need Area and then searching by Strand/Concept/Performance Objective.

1. Begin by navigating to the Setup screen under NTL. screen.
2. Open the Synergy SE Navigation Tree by clicking on the **Tree** button.

Figure 6-8 Synergy Navigation Tree

3. Expand the Synergy SE folder by clicking on the name **Synergy SE** or pointing next to the word. Once clicked, the triangle will turn green and point downward.
4. Under the Synergy SE folder, click on the name **NTL** or pointing right next to it. The triangle will turn green and point downward.
5. Under the NTL folder, click on the name **Setup**. The Setup screen opens.

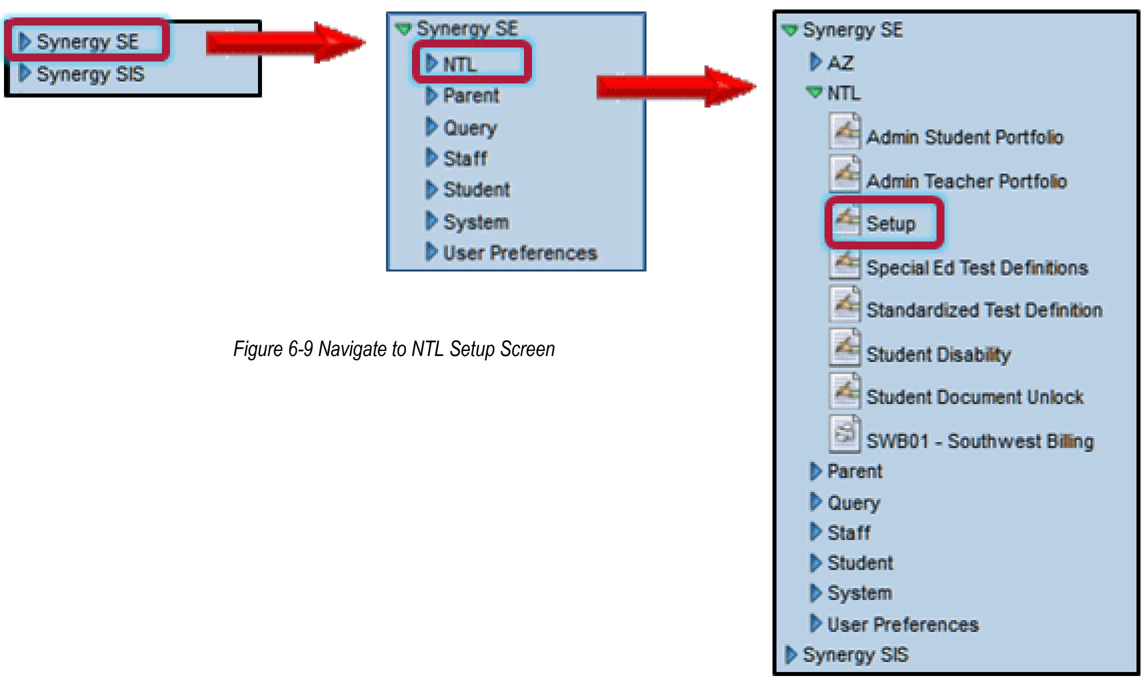


Figure 6-9 Navigate to NTL Setup Screen

6. Enter **Standard Effective Date**. **(**MMDDYY) or click and select date. This date will determine when the new Goal Structure displays in the IEPs. IEPs currently being drafted will not be affected.
7. Click **Append Standard code to Goal Description** and select **Suffix, Prefix**, or **None**.

Standard Description *<u>Suffix</u>* Example:

Dayton will demonstrate improved oral expression by showing greater proficiency and functional use of the targeted communication skill (summarize or paraphrase something heard or read) at grade level, given group/classroom activities with the necessary levels of support, scoring 15 out of 18 on a district Integrated language rubric, measured quarterly.

Grade 01, Strand 1: American History, Concept 01: Research Skills for History, 01 Place important life events in chronological order on a timeline.

8. Click Save.

Import State Standards from Grade Book into Synergy SE

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

Figure 6-10 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **System** or pointing right next to it. The triangle will turn green and point downward.
4. Under the System folder, click on the name **Special Education** or pointing right next to it. The triangle will turn green and point downward.
5. Click on the name **Standard Import**. The Standard Import screen opens.

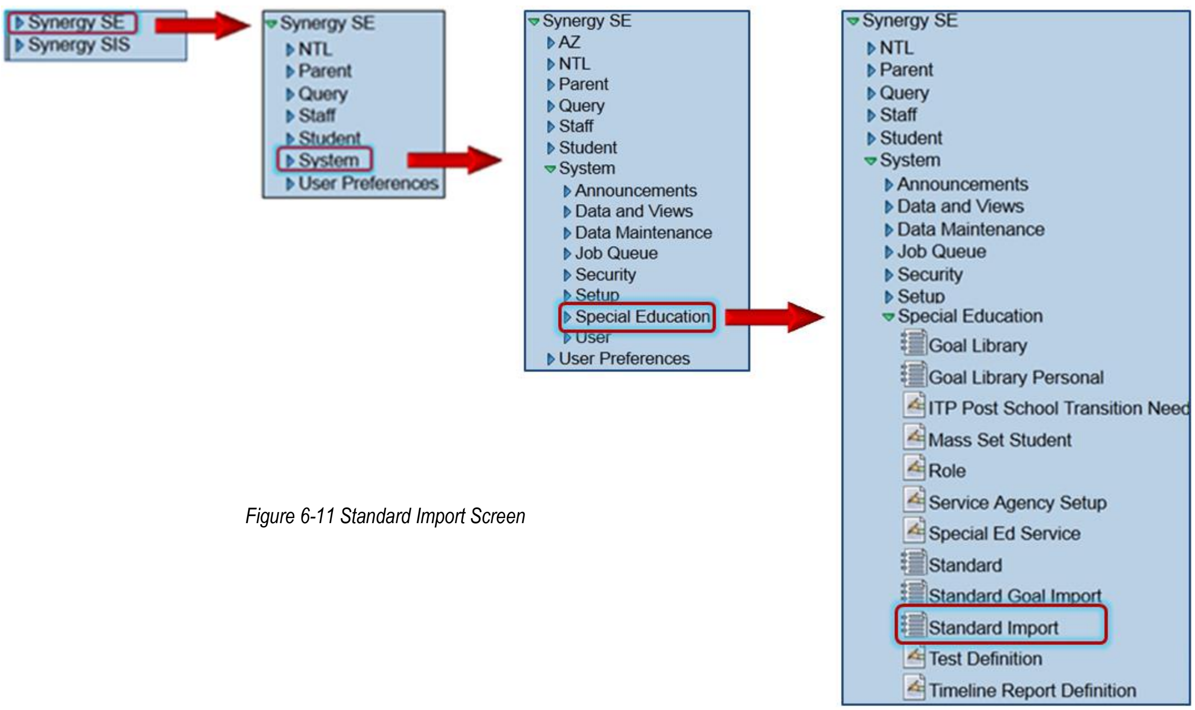
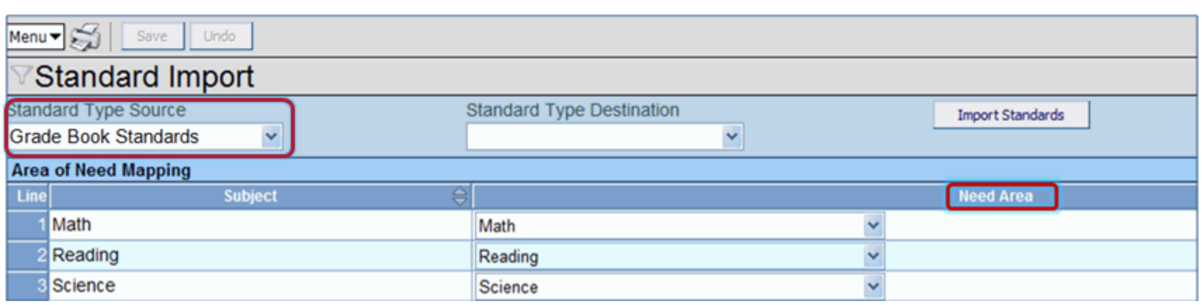


Figure 6-11 Standard Import Screen

6. Select **Grade Book Standards** from **Standard Type Source**. The **Standard Type Destination** can be left blank. A destination will be created when standards are imported.



7. Select **Need Area**.This drop-down list is generated from System>Special Education>Area of Need Setup. Your current **Need Area** list will most likely need to be modified to align appropriately with the standard subjects. Only one **Need Area** can be selected for each **Subject**.
8. Click Save.

ATTACH GOALS TO IMPORTED STANDARDS

Figure 6-12 Standard Import Screen

9. Navigate to Synergy SE>System>Special Education>Standard.

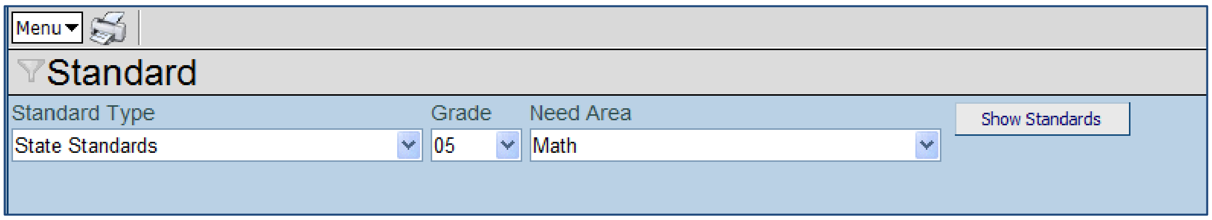


Figure 6-13 Standard Screen

10. Click Standard **Type**, **Grade** and **Need Area** and select.
11. Click Show Standards.
12. Navigate to the specific standard by expanding the appropriate **Strand**, **Concept** and **Performance Objective** node.

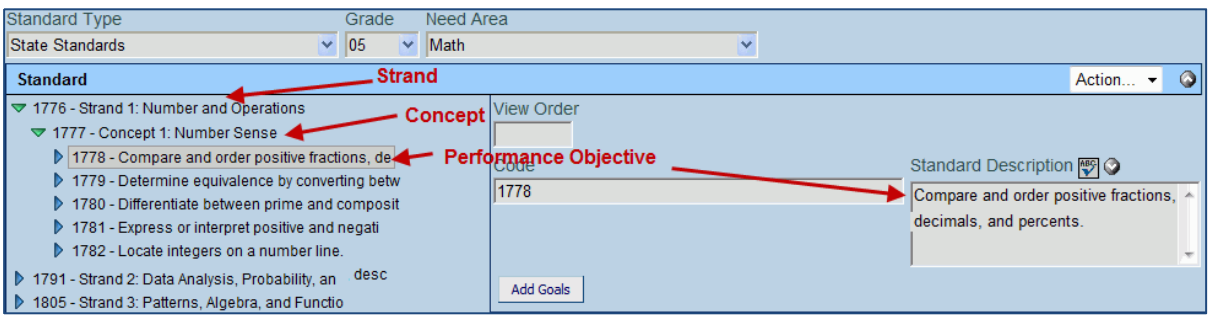
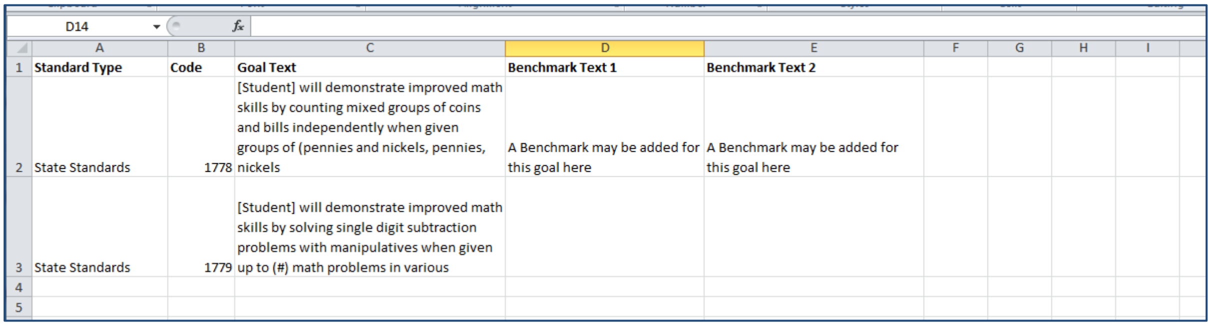


Figure 6-14 Standard Screen Show Standards

13. Click Add. A new line displays on grid.
14. Enter **Description.** Click to spell check. Click for more space.
15. Goals can be uploaded via spreadsheet, also.
16. Click Save.

UPLOADING GOALS FROM SPREADSHEET

1. Navigate to System>Special Education>Standard Goal Import screen.



	A	B	C	D	E
1	Standard Type	Code	Goal Text	Benchmark Text 1	Benchmark Text 2
2	State Standards	1778	[Student] will demonstrate improved math skills by counting mixed groups of coins and bills independently when given groups of (pennies and nickels, pennies, nickels	A Benchmark may be added for this goal here	A Benchmark may be added for this goal here
3	State Standards	1779	[Student] will demonstrate improved math skills by solving single digit subtraction problems with manipulatives when given up to (#) math problems in various		
4					
5					

Figure 6-15 Spreadsheet Format for Importing Goals

2. Use the above format (**Standard Type, Code, Goal Text, Benchmark Text 1, Benchmark Text 2**) to create a list of desired goals to upload. The **Code** column represents the Performance Objective of the Standard.
3. Click Add to browse, locate and upload the spreadsheet.
4. Check **Process.**
5. Click Save.
6. Click Process Files. The goals listed in the spreadsheet should now be attached to the appropriate standard.

Add Goals to IEP

If the **Standard Goal Effective Date** has been set all new IEPs will display the standard goal format.

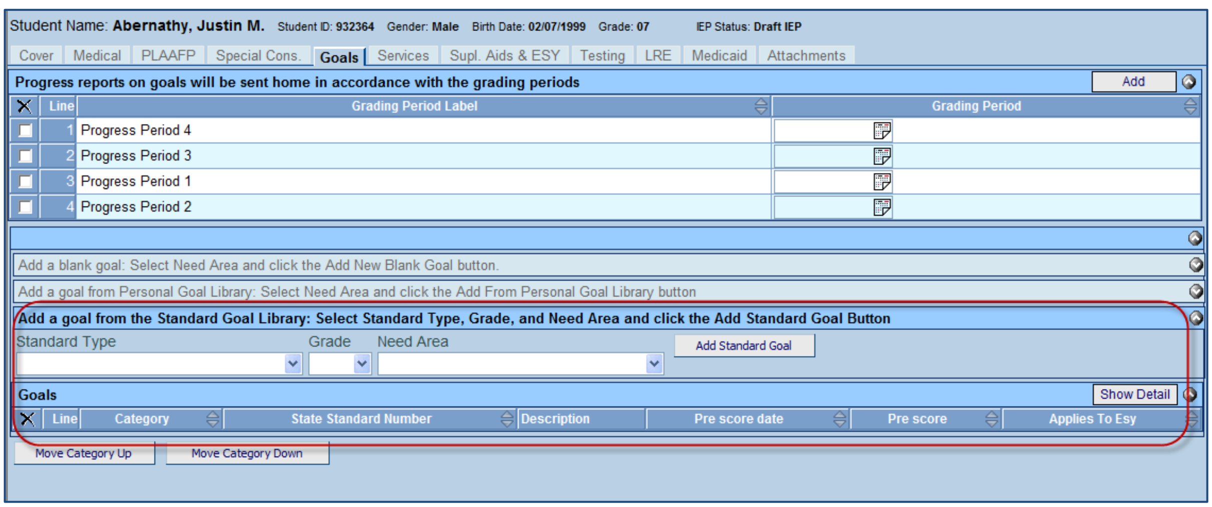


Figure 6-16 IEP Screen Goals Tab

Search Standard Goal Library- Add Goals

1. Click Standard Type, Grade, and Need Area and select.
2. Click Add Standard Goal.
3. The standards that have been aligned with the selected Need Area will display.
4. Select the goal by clicking to expand the **Strand**, then **Concept**, then **Performance Objective.** If a goal is aligned with the selected Performance Objective in the Standard Goal Import, it will display.

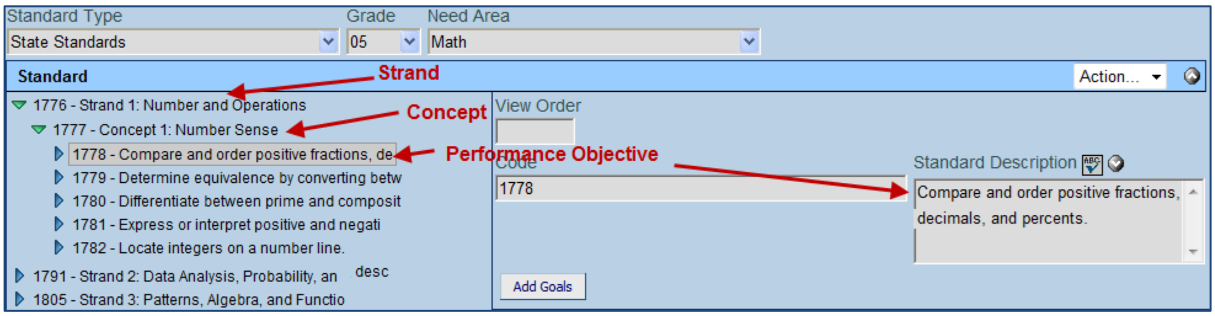


Figure 6-17 Goal Statements Aligned With Standard

5. Check **Add** on the line of the desired goals.
6. Click Add Goals. A message confirming the selected goal has been assigned to the IEP appears.
7. Click Save when finished adding goals.
8. Close the **Goal** screen. The selected goals display in the IEP.

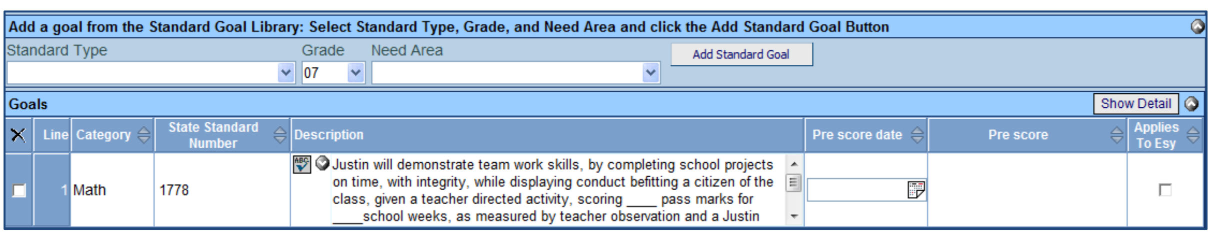


Figure 6-18 IEP Screen Goal Added From Standard Search

Chapter Seven:
SPECIAL ED TESTS

In this chapter, the following topics are covered:

- Special Ed Test Definitions
- Standardized Test Definitions

OVERVIEW

Special Ed Tests exist in two categories:

- **Special Ed Test Definitions**

  Special Ed Test Definitions are templates based on evaluation assessments. Individual school districts have the ability to edit existing test definitions as well as create new templates. The templates are accessed through the MET Report (GENAZ 06).

- **Standardized Test Definitions**

  Standardized Test Definitions are templates based on district tests. Individual school districts have the ability to edit existing standardized tests as well as create new templates. The Standardized Test Definitions are accessed through the Referral document (GENAZ 01), MET Report (GENAZ 06) and the IEP (GENAZ 12).

Special Ed Test Definitions

Navigate to the Special Ed Test Definitions Screen

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

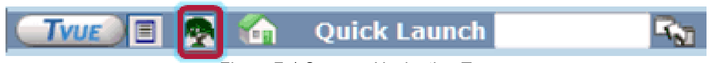


Figure 7-1 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or ▷ pointing next to the word. Once clicked, the triangle will turn green ▽ and point downward.
3. Under the Synergy SE folder, click on the name **NTL** or ▷ pointing right next to it. The triangle will turn green ▽ and point downward.
4. Under the NTL folder, click on the name **Special Ed Test Definitions**. The Special Ed Test Definitions screen opens.

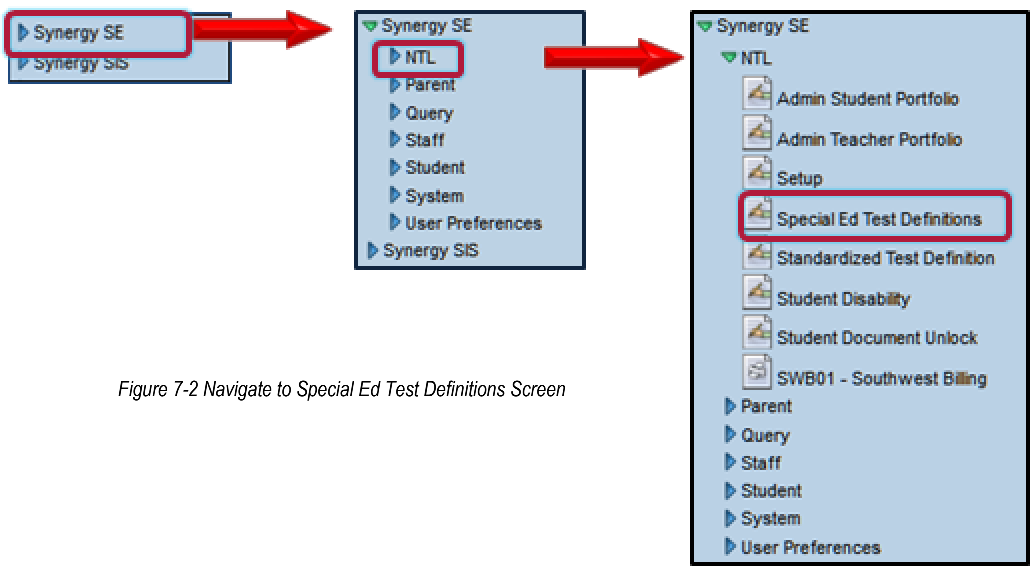


Figure 7-2 Navigate to Special Ed Test Definitions Screen

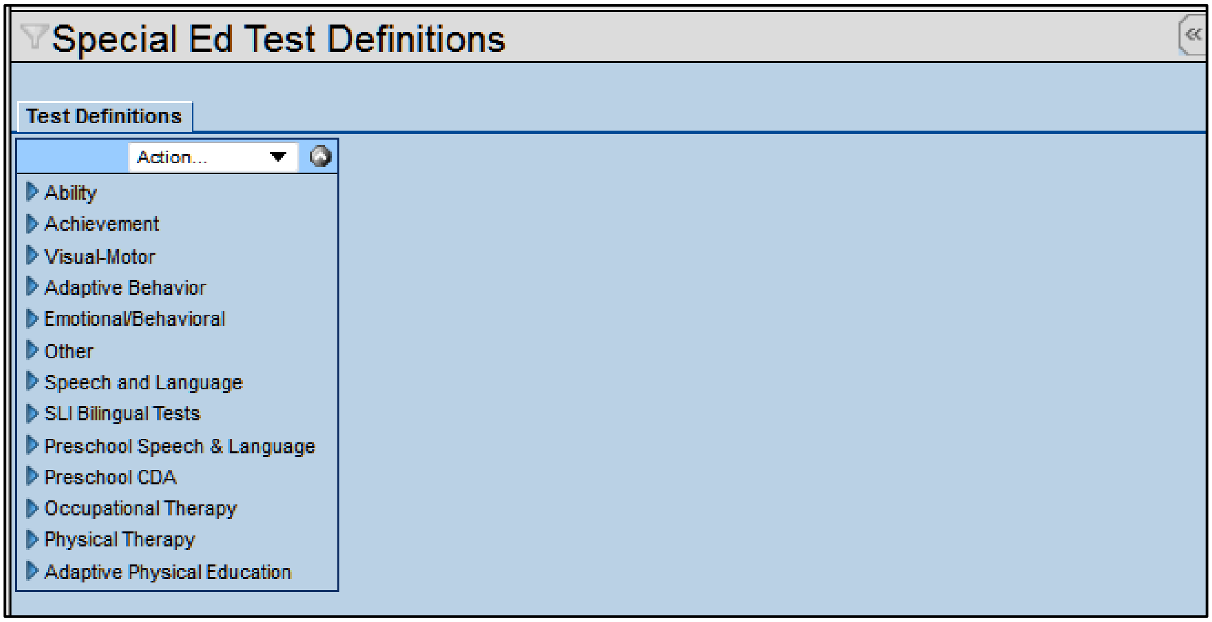


Figure 7-3 Special Ed Test Definitions Screen

Add a New Category

1. Click on **Action...** on the Test Definitions tab.

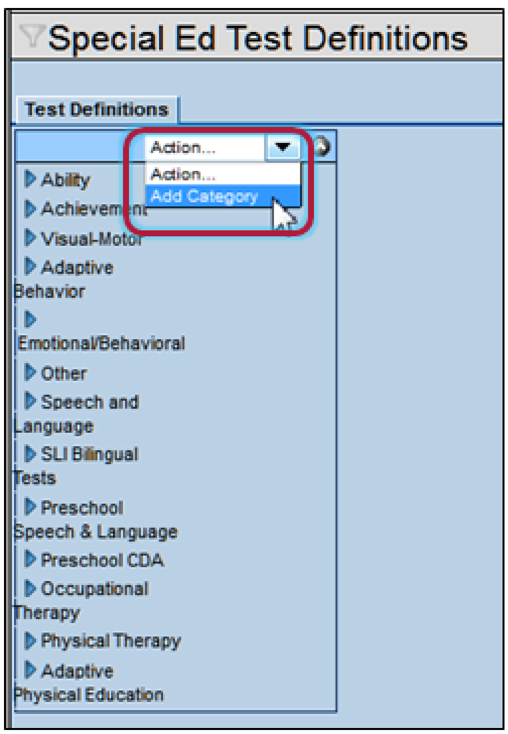


Figure 7-4 Special Ed Test Definitions Screen Action Drop-down

2. Select **Add Category**. The SpedTestDefinitionCategory screen displays.

3. Enter the **Long Name** of the new category.
4. Enter a **Short Name** for the category. (15 characters).

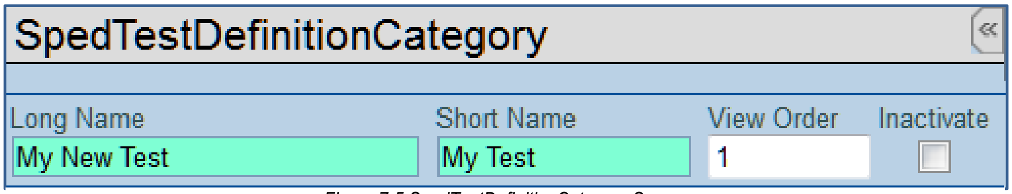


Figure 7-5 SpedTestDefinitionCategory Screen

5. Enter the **View Order** for the category to display in the Category list.
6. Click Save. The new category will appear in the Category list.

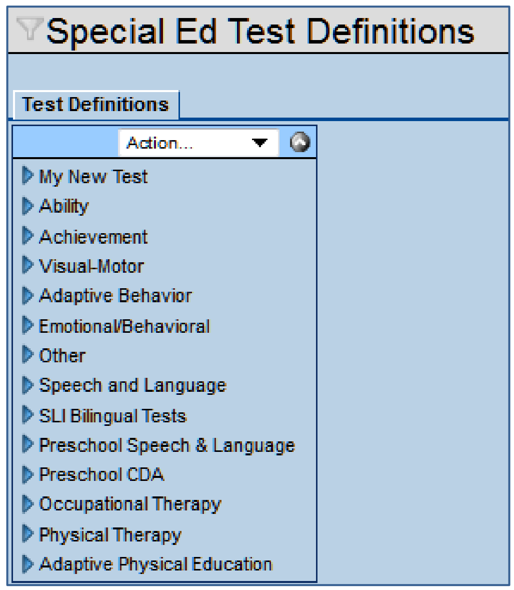


Figure 7-6 Special Ed Test Definitions Screen New Category Displayed

ADD NEW TEST GROUP TO AN EXISTING CATEGORY

1. Click on the **Category** name. The Category Definition displays on the right..
2. Click on **Action...** .

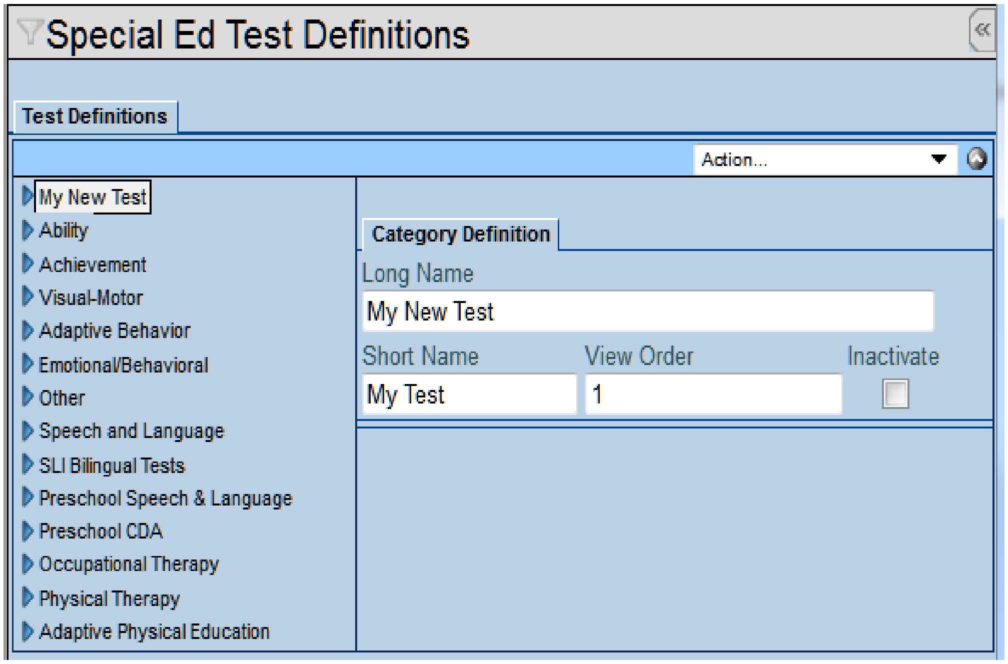


Figure 7-7 Special Ed Test Definitions Screen Detailed View

3. Select Add Group to *selected category*. The SpedTestDefinitionGroup screen will open in a new window.

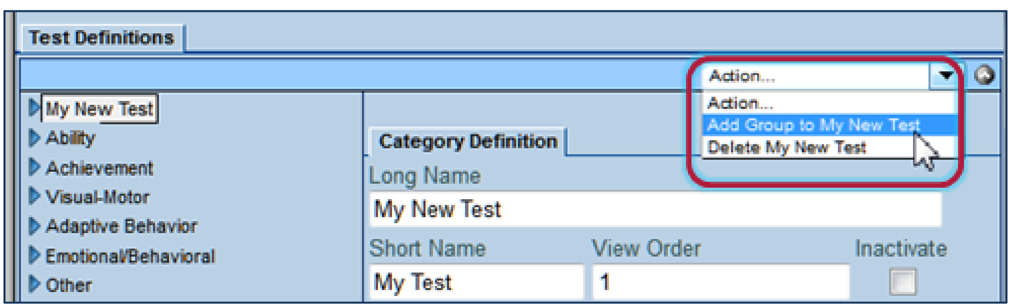


Figure 7-8 Special Ed Test Definitions Screen Action Drop-down

4. Enter the **Long Name** of the new test group
5. Enter the **Short Name** of the new test group (15 characters).

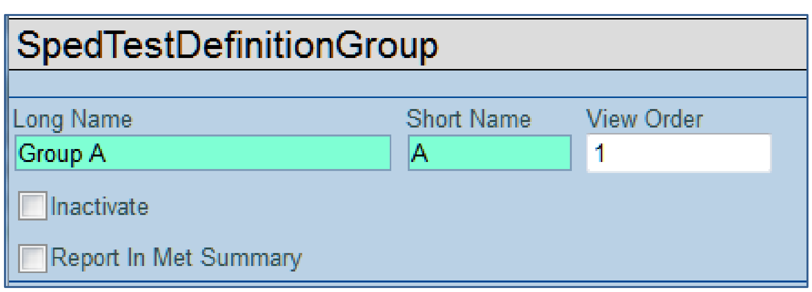


Figure 7-9 SpedTestDefinitionGroup Screen

6. Enter the **View Order** for the test group to display in the Category list.
7. Click Save. The new test group will appear under the Category.

ADD A NEW TEST TO A TEST GROUP

1. Click on the ▶ next to **Category** name.
2. Click on the **Test Group** name. The Group Definition details display on right.
3. Click on **Action...** .

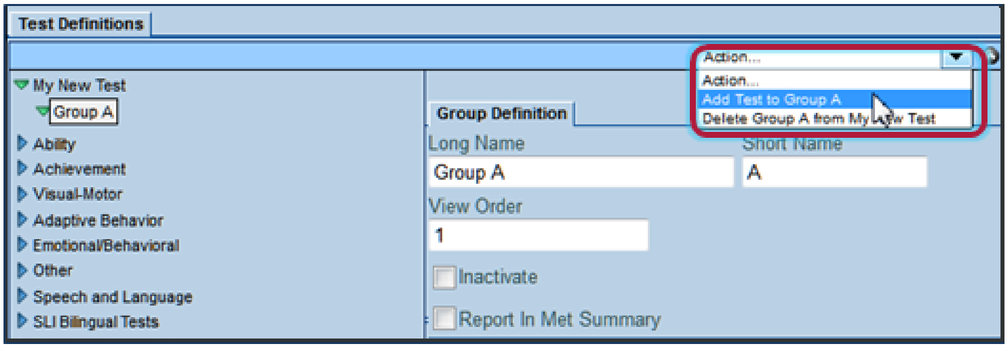


Figure 7-10 Special Ed Test Definitions Screen Action Drop-down

4. Select **Add Test to *selected group*.** The SpedTestDefinitionTest screen opens.

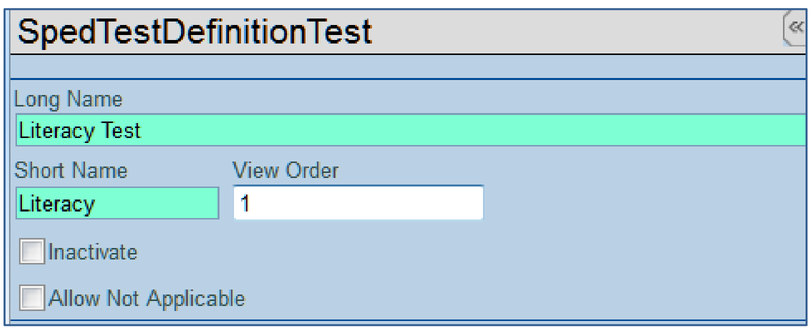


Figure 7-11 SpedTestDefinitionTest Screen

5. Enter the **Long Name** of the new test.
6. Enter the **Short Name** of the new test (15 characters).
7. Enter the **View Order** for the test to display in the group.
8. Click Save. The new test will appear under the group.

EDIT EXISTING SPECIAL ED TEST DEFINITIONS

1. Click on the ▶ next to **Category** name. The name highlights and the details display on the right.

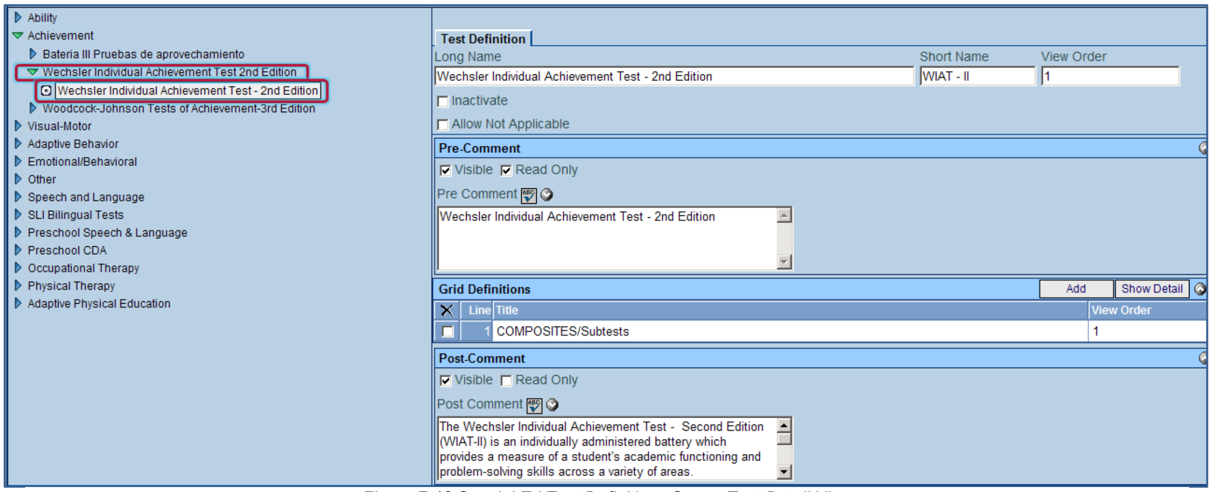


Figure 7-12 Special Ed Test Definitions ScreenTest Detail View

2. Select the **Test** (group).
3. Select the **Test** name from the Test (group). The Test Definition tab displays on right.

The Test Definitions for each test are divided into 5 areas:

- **Test Definition**
- **Pre-Comment**
- **Grid Definitions**
- **Post-Comment**
- **Library Statements**

TEST DEFINITION

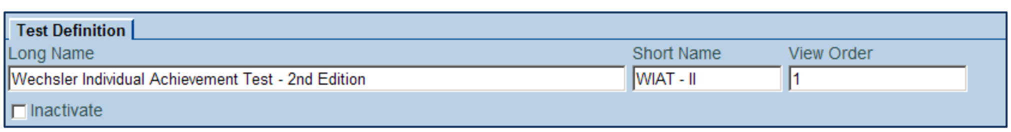


Figure 7-13 Special Ed Test Definitions ScreenTest Detail View Test Definition

1. **Long Name**, **Short Name** and **View Order** can be changed in this area. The **Inactivate** checkbox will remove the test from MET Report Assessment List.

PRE-COMMENT

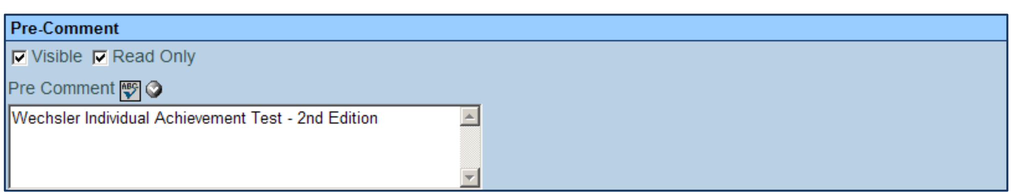


Figure 7-14 Special Ed Test Definitions ScreenTest Detail View Pre Comment

2. The **Visible** checkbox ensures that the user can see the textbox from document screen.
3. If **Read Only** is selected, this textbox cannot be edited from the document.
4. The **Pre-Comment** textbox will display any information on this test prior to the Grid Definitions.

Figure 7-15 Special Ed Test Definitions ScreenTest Detail View Grid Definitions

Grid Definitions

Grid Definitions contains the test scoring tables.

5. Click to add a new table (grid).
6. Enter the **Title** of the table and list the **View Order.**

Define Column and Row Definitions

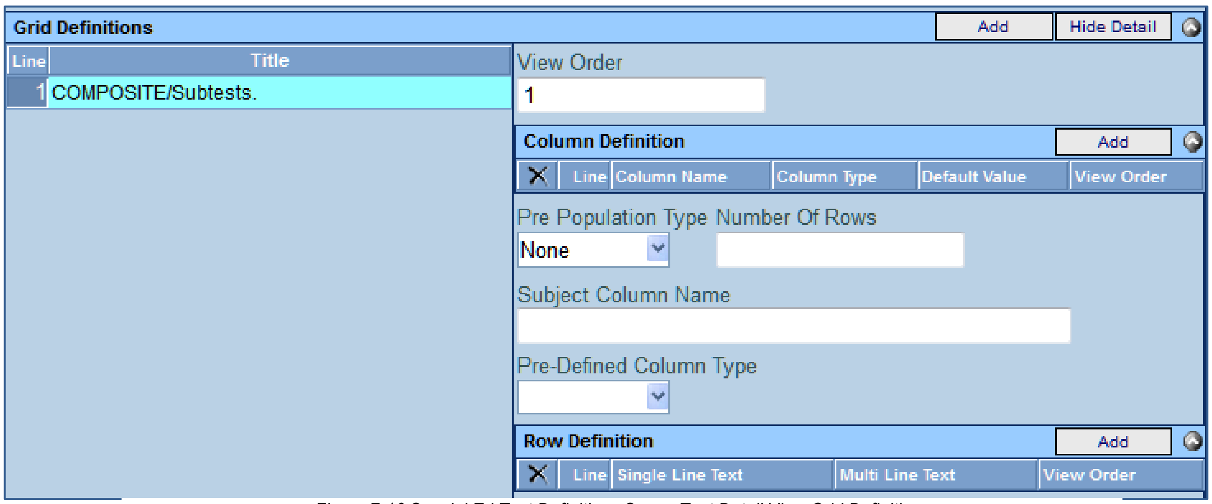


Figure 7-16 Special Ed Test Definitions ScreenTest Detail View Grid Definitions

7. Double click the row of the **Title** to highlight or click the row once to highlight and then click . A detailed screen opens to the right.
8. Click on the Column Definition bar. A new line is added to the grid.
9. Enter a **Column Name**.
10. Click **Column Type** and select the type of data that will be entered. The choices are: **Text, Date, Yes/No Drop Down Or Multi-Line Text**..

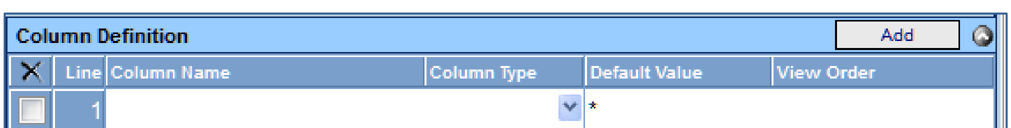


Figure 7-17 Special Ed Test Definitions ScreenTest Detail View Grid Definitions Column Definitions

11. A **Default Value** can be added (optional).
12. Enter the **View Order** to define the column order.
13. Click **Pre Population Type** and select. The choices are: **None, Number of Rows, or Define Rows.** Usually Define Rows is selected. If Number of Rows is selected, the **Number of Rows** textbox will need to be addressed.
14. Enter the title of the first column of the table in **Subject Column Name.**
15. Select the type of data that to be entered in the first column in **Pre-Defined Column Type** **.** The choices are: **Text or Multi-Line Text.**

16. Click Add on the Row Definition bar.to define the data that will appear on the first row of this table (Row Titles). A new line is added to grid.

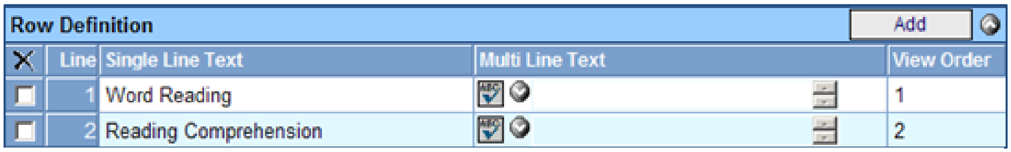


Figure 7-18 Special Ed Test Definitions ScreenTest Detail View Grid Definitions Row Definitions

17. Select whether the data will be **Text** or **Multi-Line Text**.
18. Enter the **View Order** for each row.
19. Click Save.

POST COMMENT

20. The **Visible** checkbox ensures that the user can see the textbox from document screen.

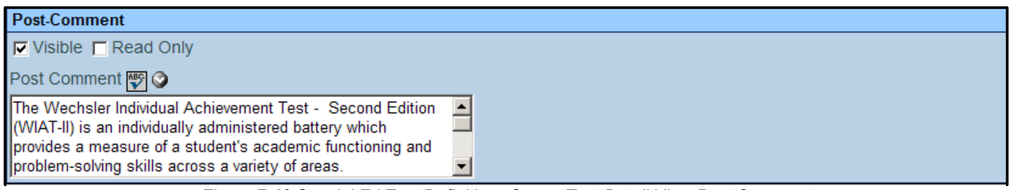


Figure 7-19 Special Ed Test Definitions ScreenTest Detail View Post Comment

21. If **Read Only** is selected, this textbox cannot be edited from the document.
22. The **Post-Comment textbox** displays any information on this test prior to the Grid Definitions.

LIBRARY STATEMENTS

23. Click Add on the Library Statements bar to add Library Statements to the document. These are available to the user as editable drop-down statements that display in a textbox. Check Library Statements Visible or they will be hidden from view.
24. Click Save.

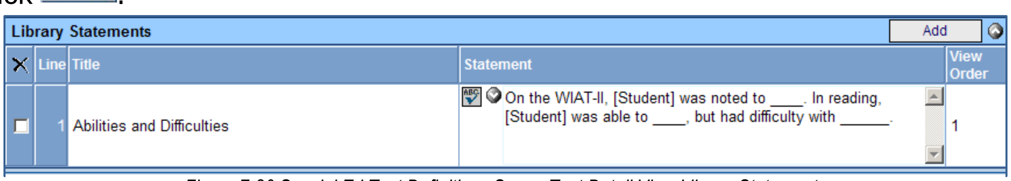


Figure 7-20 Special Ed Test Definitions ScreenTest Detail View Library Statements

Test Definition as it will appear to Users in the MET Report

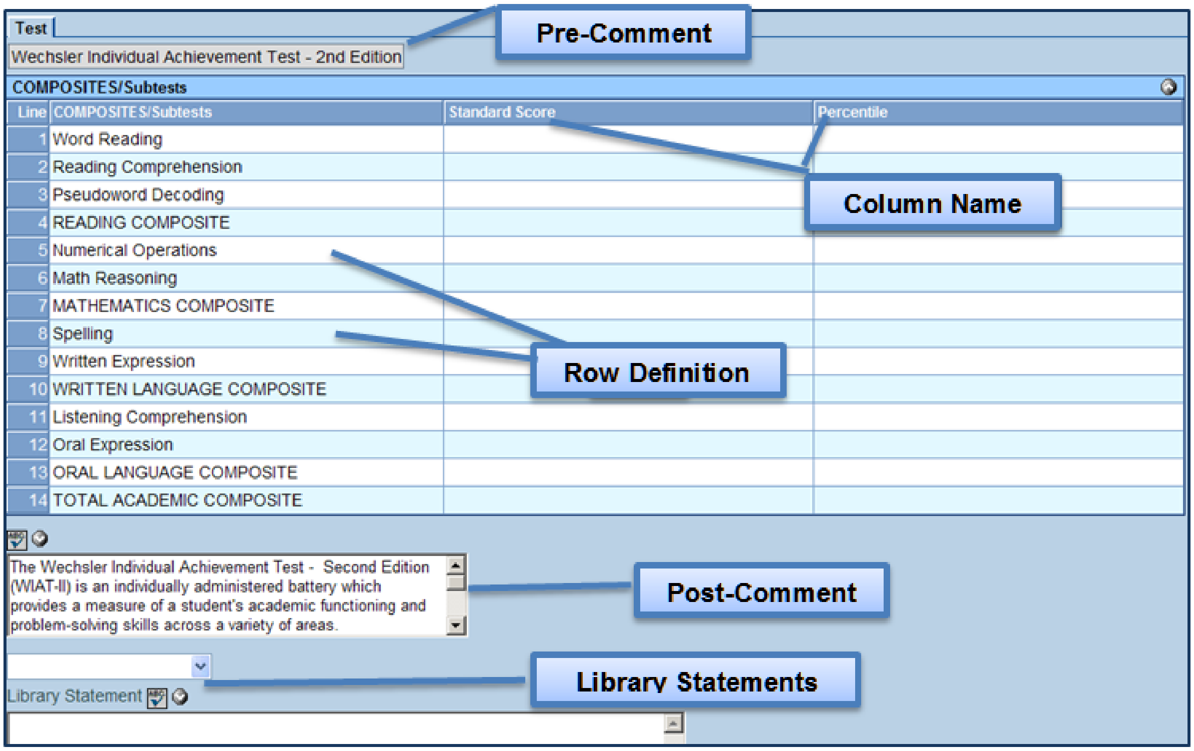


Figure 7-21 MET Test Definition Example

DELETE A SPECIAL ED TEST DEFINITION

It is not recommended that Special Ed Test Definitions Categories or Groups (Tests) be deleted. Rather, they should be ***Inactivated***.

1. From the Special Ed Test Definitions screen, click on the **Category** to be inactivated.
2. Check Inactivate.
3. Click Save. The Special Ed Groups and Sub-groups which exist under the selected Category will no longer be accessible in the MET Report.
4. If desired, Special Ed Groups and Sub-groups may be inactivated by themselves, by checking Inactivate on their respective screens.

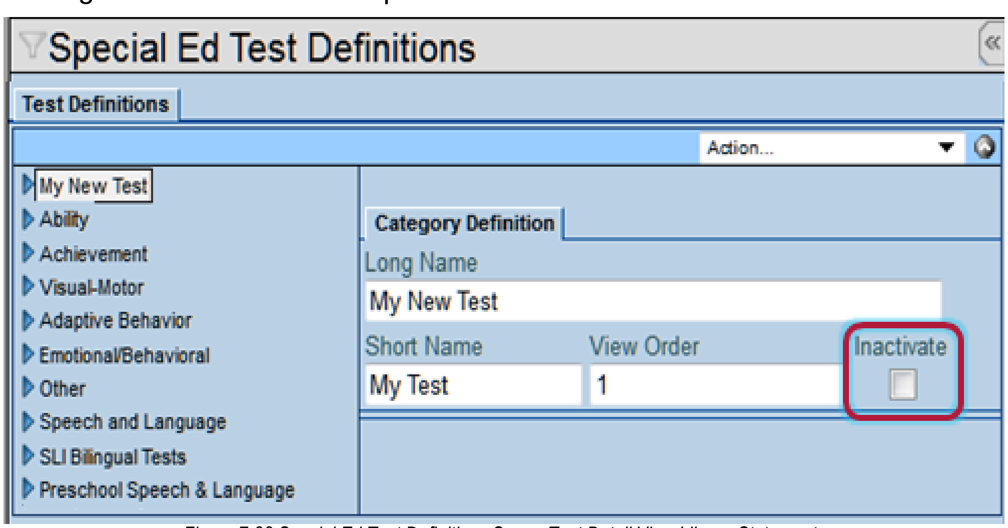


Figure 7-22 Special Ed Test Definitions ScreenTest Detail View Library Statements

STANDARDIZED TEST DEFINITIONS

NAVIGATE TO THE STANDARDIZED TEST DEFINITIONS SCREEN

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

Figure 7-23 Synergy Navigation Tree

2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SE folder, click on the name **NTL** or pointing right next to it. The triangle will turn green and point downward.
4. Under the NTL folder, click on the name **Standardized Test Definitions**. The Standardized Test Definitions screen opens.

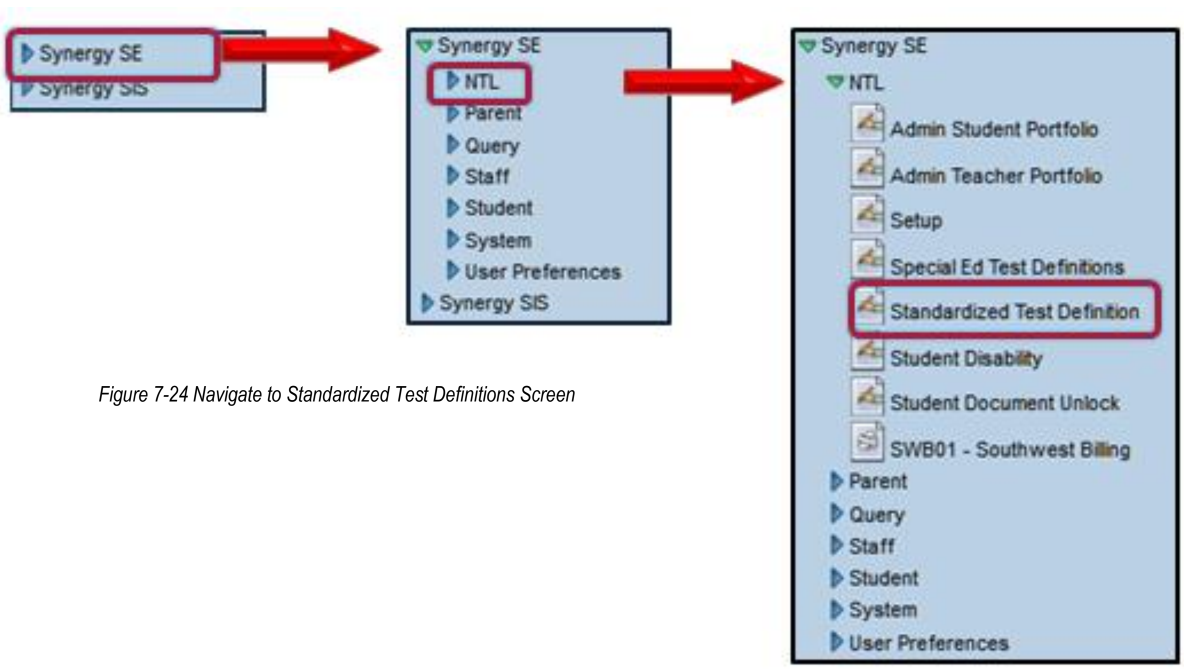


Figure 7-24 Navigate to Standardized Test Definitions Screen

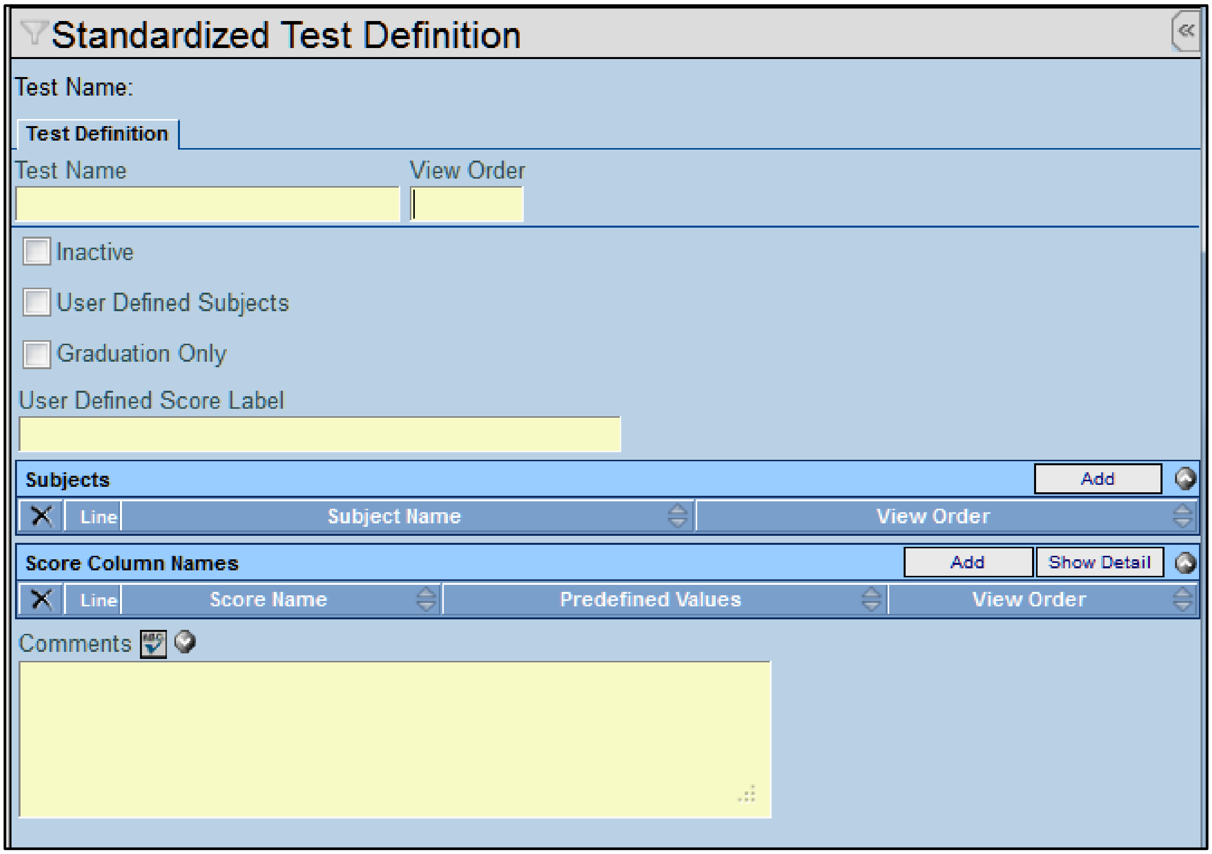


Figure 7-25 Standardized Test Definition Screen

The Standardized Test Definition screen contains the following components:

- **Test Name**

  The Test Name is entered in this textbox.

- **View Order**

  Controls the view order of the test as it appears in the Synergy SE documents.

- **Inactive**

  Rather than deleting the Standardized Tests, it is recommended that they be Inactivated. Once checked, they will no longer appear in the Synergy SE documents.

- **User Defined Subjects**

  Allows the user to add the subject data to the test.

- **User Defined Score Label**

  Allows the user to add the Score Label data to the test.

- **Subject and Score Column Names grid**

  If User Defined is *not* selected, the Subject and Score information are entered in this grid.

VIEW EXISTING STANDARDIZED TEST DEFINITIONS

1. From the Standardized Test Definition screen, click Find. The Standardized Test Definition: Find Result screen opens.

2. Double click the row of the desired **Test Definition**. The Standardized Test Definition: Find Result screen closes and the selected Test Definition displays on the Standardized Test Definition screen.

ADD NEW STANDARDIZED TEST

1. Click  the Standardized Test Definition screen. A new **Standardized Test Definition** screen displays.

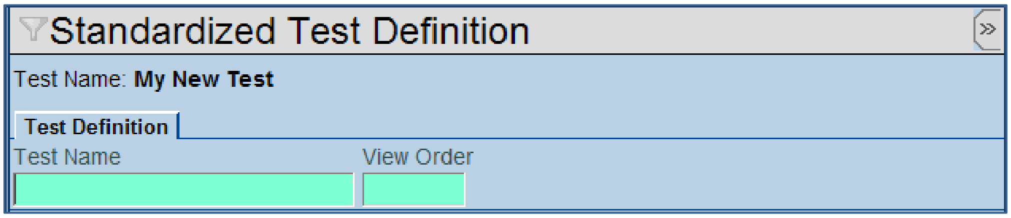


Figure 7-26 Standardized Test Definition Add Screen

2. Enter the **Test Name** and **View Order**.
3. Click . The screen closes and the new definition displays.

USER DEFINED TEST

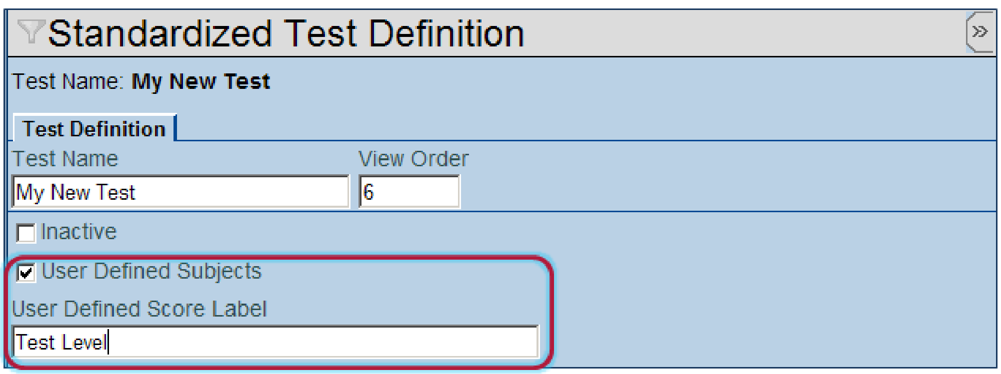


Figure 7-27 Standardized Test Definition Screen User Defined Test

1. If the test will be User Defined, check **User Defined Subjects**.
2. Enter a **User Defined Score Label.**
3. Click  when complete.

The new test will display to the user in the Standardized Test section of the Synergy SE documents. Since it has been set up as User Defined, the score label area is set up by the user.

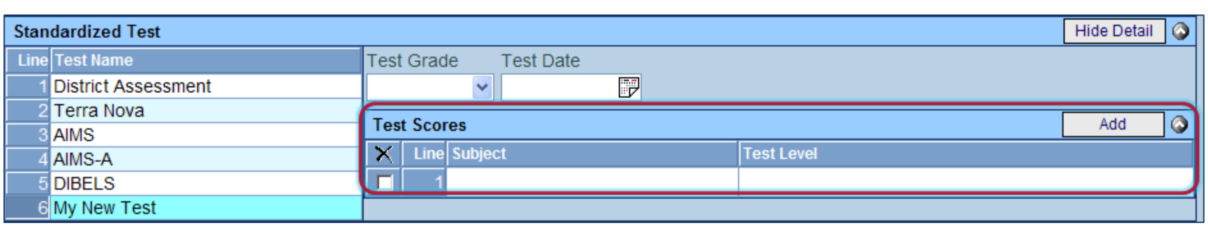


Figure 7-28 SE Documents User Defined Test Example

Non-User Defined Test

If the test is *not* set up as User Defined, The User Defined Subjects checkbox and Score Label textbox will be left blank. The Subjects included in this test will be added to the Subject grid.

1. Click Add on the **Subjects** bar. A new line is added.
2. Enter the **Subject** name.
3. Enter the **View Order**.

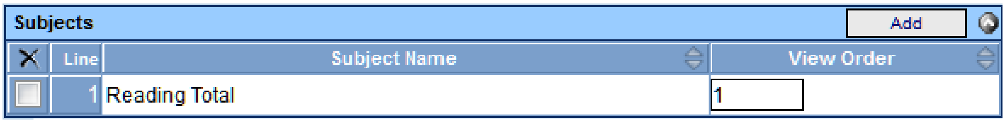


Figure 7-29 Standardized Test Definition Screen Non-User Defined Test Subjects Grid

4. Repeat until all subjects have been added.
5. Click Add on the **Score Column Names** bar to add columns.
6. Enter **Score Name**.
7. Check to use **Predefined Values**, if appropriate.
8. Enter **View Order.**
9. Click Save.
10. Click Show Detail to add the Predefined Values, for the Score drop-down selection.

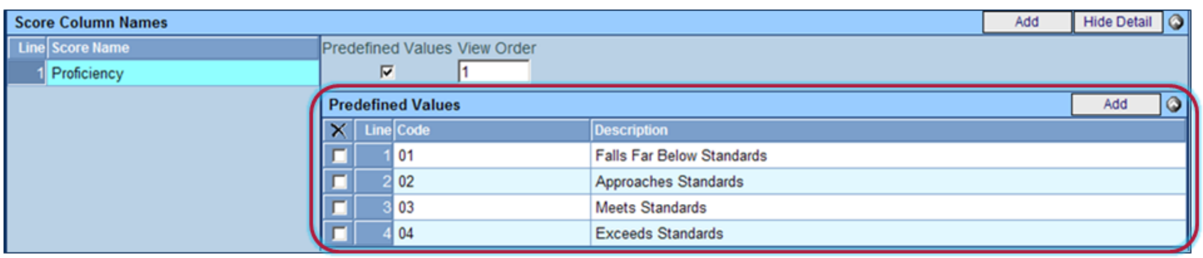


Figure 7-30 StandardizedTest Definition Screen Non-User Defined Test Score Column Names Grid

11. Click Add on the **Predefined Values** bar.
12. For each value, enter the **Code**.
13. Enter a **Description.**
14. Click Save when complete.

The new test will display to the user in the Standardized Test section of the Synergy SE documents. Since it has been set up as User Defined, the score label area is set up by the user.

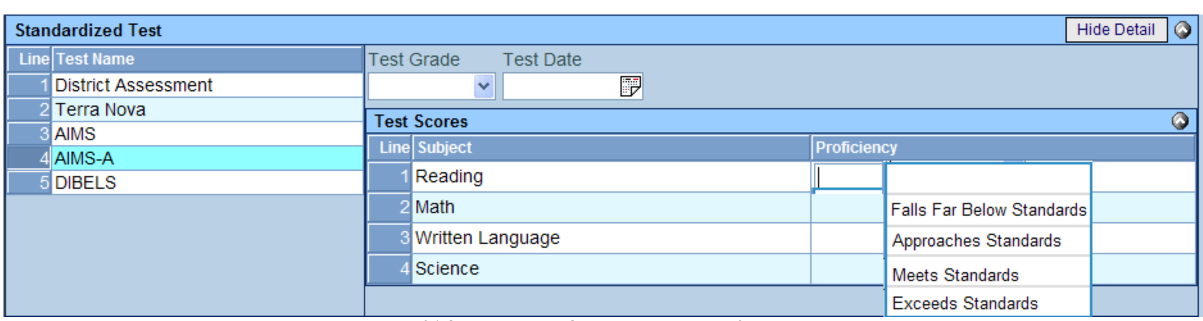


Figure 7-31 SE Documents Standardized Test Definition Example

Delete Standardized Tests

It is not recommended that Standardized Tests be deleted. Rather, they should be ***Inactivated.***

1. To inactivate, check **Inactivate.**
2. Click 

.

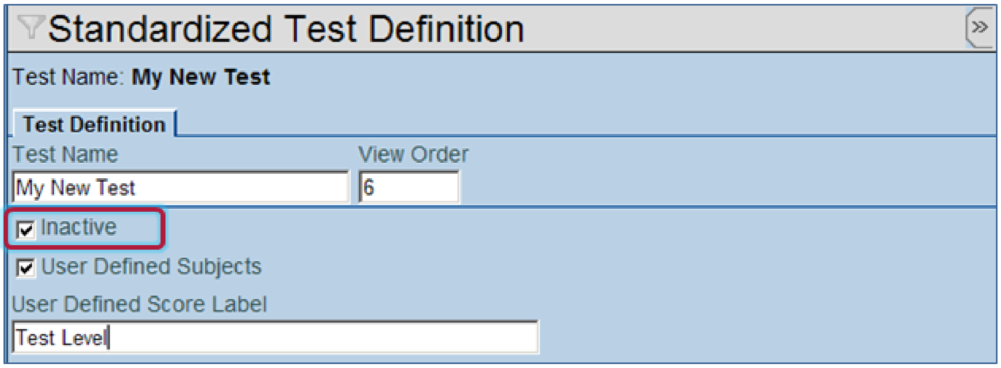


Figure 7-32 Standardized Test Definition

The test will no longer be visible in the Synergy SE documents Standardized Test grid.

Chapter Eight: COMMON TABLE LOCATIONS

In this chapter, the following topics are covered:

- ► Commonly Used Table Locations

Document ID	**Table Content**	**Location**
GENAZ 01 Referral	Areas of Concern	Synergy SE*>System>Setup>Lookup Table Definition>K12.SpecialEd.AZ.Document>Ref (Area) List
	Student Evaluation Report>Details	Synergy SE*>System>Setup>Lookup Table Definition>K12.SpecialEd.AZ.Document>Ref Student Eval List
All Prior Written Notices	Statement Drop-downs	Synergy SE>System>Special Education>Document Definition
GENAZ 06 MET	Additional Data Tab>Evaluation Procedures	Synergy SE*>System>Setup>Auto Populate, AZ>MET>Evaluation Procedure
	Additional Data Tab>Evaluation Procedure Summary	Synergy SE*>System>Setup>Auto Populate, AZ>MET>EvaluationProcedureSummary
	Additional Data Tab>Classroom Observations	Synergy SE*>System>Setup>Auto Populate, AZ>MET>ClassroomObservation
	Additional Data Tab>Test Behavior	Synergy SE*>System>Setup>Auto Populate, AZ>MET>TestBehavior
	Additional Data Tab>Assessment Results Category and Test	Synergy SE>AZ>Special Ed Test Definitions
	Eligibility Tab>Educational Needs and Recommendations	Synergy SE*>System>Setup>Auto Populate, AZ>MET>Suspected Disability
	Eligibility Tab>Accommodation Category	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>Accommodations
	Eligibility Tab>Accommodation Category Detail	Same as above, but click specific Accommodation
	Eligibility Tab>Assistive Technology	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>AsstTech
	Eligibility Tab>Primary and Secondary Disability	Synergy SE*>System>Setup>Lookup Table Definition>K12.SpecialEd>Disability Code or Disability Code Ps
GENAZ 12 IEP	Cover Tab>Primary and Secondary Disability	Synergy SE*>System>Setup>Lookup Table Definition>K12.SpecialEd>Disability Code or Disability Code Ps(preschool)
	Medical Tab>Health Issues	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>HealthIssues
	PLAAFP Tab>Strengths of Student	Synergy SE*>System>Setup>Auto Populate, AZ>MET>Strength
	PLAAFP Tab>Needs as They	Synergy SE*>System>Setup>Auto Populate,

	Affect Learning	AZ>MET>Weakness
	PLAAFP Tab>Medicaid Service Category	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>MedicaidService
GENAZ 12 IEP	PLAAFP Tab>Medicaid Service Code	Same as above, but click specific Service
	Special Cons. Tab>Assistive Technology	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>AsstTech
	Goals	Synergy SE>System>Special Education>Goal Library
	Supl. Aids and ESY Tab>Accommodation Category	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>Accommodations
	Supl. Aids and ESY Tab>Accommodation Category Detail	Same as above, but click specific Accommodation
	Testing Tab>Accommodations	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>TestAccomm
	LRE Tab>Preschool	Synergy SE*>System>Setup>Lookup Table Definition> K12.SpecialEd.AZ.IEP> Lre Preschool
	LRE Tab>Elementary and Secondary	Synergy SE*>System>Setup>Lookup Table Definition> K12.SpecialEd.AZ.IEP> Lre Elemsec
	LRE Tab>Progress in the General Curriculum	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>ImpactByDisab
	LRE Tab>Potential Harmful Effects	Synergy SE*>System>Setup>Auto Populate, AZ>IEP>EffectsOfPlcmnt

Table 11 Common Table Locations

INDEX

INDEX OF SCREENS

