Synergy SE©
National User Guide

Edupoint Educational Systems, LLC
1955 South Val Vista Road, Suite 200
Mesa, AZ 85204
Phone (877) 899-9111
Fax (800) 338-7646

Volume 01, Edition 02 **September 2012**

Document Number: SEUG 0102

First Edition, July 2010

Second Revision, September 2012

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

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

The data in this document may include the names of individuals, schools, school districts, companies, brands, and products. Any similarities to actual names and data are entirely coincidental.

TABLE OF CONTENTS

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: INTRODUCTION TO SYNERGY SE

In this chapter, the following topics are covered:

- ► Browser configuration changes
- ► Connecting to Synergy SE
- ► Parts of the Synergy SE screen
- ► Navigation options
- ► Keyboard shortcuts
- ► Managing your Synergy SE account

WELCOME TO SYNERGY SE!

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

A web-based interface means the software is accessed using a web browser like Internet Explorer. A Windows-based interface is a separate program installed on a Windows-based computer.

Just because a web browser is used to access the software does not mean the software or information contained within it is available on the Internet! Any program can use a web interface. Each district can choose whether to make Synergy SE available on the Internet or only from the internal district network.

This user guide will explain the views and modules in the Synergy SE, where special education student demographic and report data is recorded. Special education student reports can also be generated here.

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

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

BROWSER CONFIGURATION CHANGE

Before accessing Synergy SE, the following changes should be made to the web browser (Internet Explorer, Firefox, etc.) so that Synergy SE works correctly. Please check the following:

- The Google toolbar, Yahoo toolbar, or any other extra toolbar prevents Synergy SE from working correctly. If any of these extra toolbars are installed, please uninstall them.
- The pop-up blocker will block certain Synergy SE screens. Please either turn off the pop-up blocker, or set it to allow pop-ups for Synergy SE.

CONNECTING TO SYNERGY SE

1. Open a new browser window.
2. Type **the web address of the Synergy SE web server,** provided by the district system administrator.

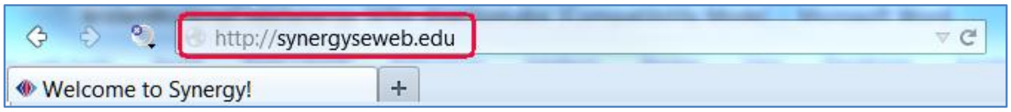


Figure 1-1 Synergy SE Web Address

3. Press **Enter** or click the **Go** button. The SYNERGY SE logon screen displays.

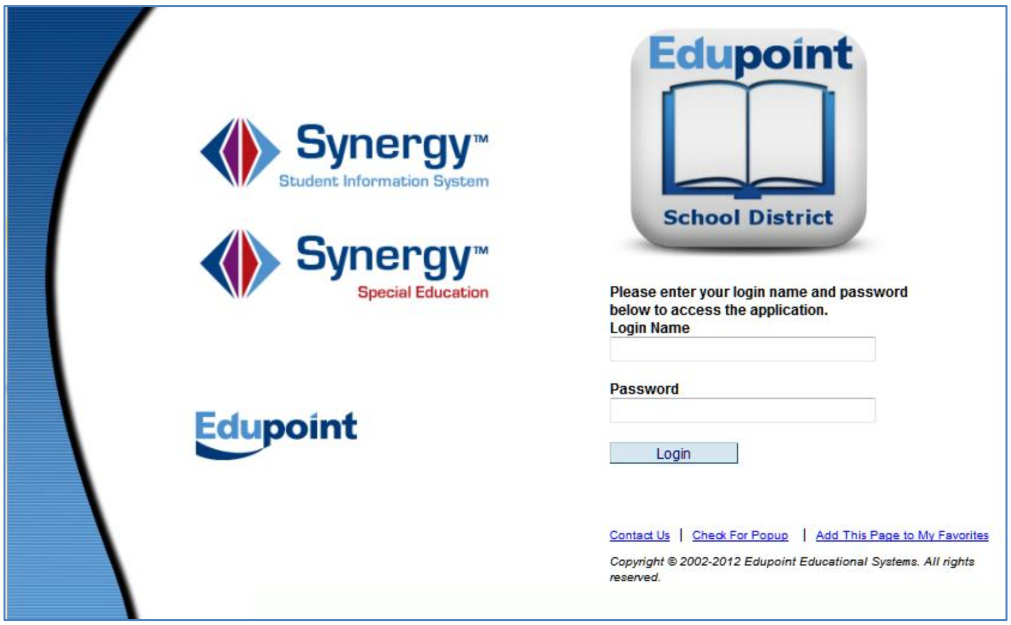


Figure 1-2 Synergy SE Logon Screen

4. Enter Login Name, and Password.
5. Click **Login** or press the **Enter** button on the keyboard.

PARTS OF THE SYNERGY SE SCREEN

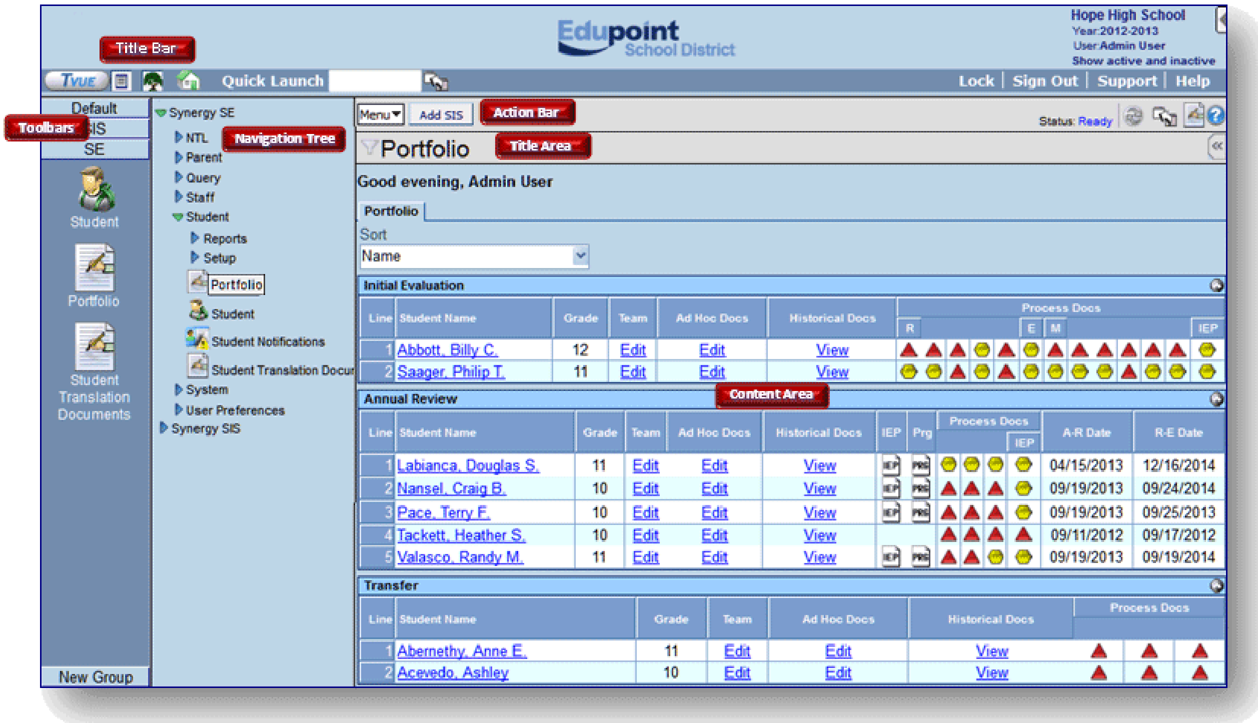


Figure 1-3 Parts of the Synergy SE Screen

The six main areas of the Synergy SE screen are:

- **Title Bar**

  The Title Bar shows the current focus, contains the Navigation icons and Quick Launch box, and lists links for locking the screen, signing out, contacting support, and searching online help.

- **Action Bar**

  This contains links and buttons for performing activities such as Save or Add relating to the current screen.

- **Title Area**

  The Tile Area displays the title information about the current screen and the icon for the Quick Nav Bar.

- **Content Area**

  This contains the current screen where records can be displayed and edited. **This is an example using the Portfolio screen.*

- **Toolbars**

  This shows one or more groups of icons setup by the Synergy SE system administrator representing shortcuts to frequently used areas in Synergy SE. Each user can create custom toolbar groups, also.

- **Navigation Tree**

  The Navigation Tree, also known as the PAD Tree, contains a tree structure that shows all of the screens and reports that can be accessed.

Title Bar

The Title Bar contains the Navigation Controls, the About button, the Support Links, and the Focus Area.

Figure 1-4 Title Bar

The Navigation Controls

The Navigation Controls are located at the top left-hand corner of the page. The controls are:

- **Toolbars Icon**

  By default, the Toolbars are turned on. To turn them off, click on the Toolbars icon. To turn them back on, click on the icon again.

- **Navigation Tree Icon**

  By default, the Navigation Tree is turned off. To turn it on, click on the Navigation Tree icon. To turn it off, click on the icon again.

- **Home Icon**

  To return to the Home page at any time from any screen, click the Home icon.

- Quick Launch **Quick Launch Bar**

  The Quick Launch bar is turned on and off for each user in the User screen by the system administrator. It provides a quick way to "launch" a screen by simply typing the name of the screen in the box.

The About Button

Clicking on the Synergy logo will bring up a small screen that provides the product version information.

The Support Links

The Support Links are located in the top right-hand corner of the page. The links are:

- **Lock**

  Clicking the link labeled Lock locks the Synergy SE screen. The password must be re-entered to access the screen, similar to the screen lock in Windows. This is helpful when the user needs to leave their desk momentarily and does not want to lose their work, but the information needs to be secured.

- **Sign Out**

  Clicking on this link logs the user out of Synergy SE and returns to the Login page.

- **Support**

  This links to a page with information about how to receive support for the Synergy SE system. This page can be customized for each district.

- **Help**

  This links to the online help system. The online help can be customized for each district, and it is a separate installation.

The Focus

Each Synergy SE user is setup to look at records for a specific school and year by default. The combination of school and year is called the Focus. The focus sets whether inactive students or active students are displayed, also. The user's current focus is listed at the top right-hand corner of the Screen. Sometimes the user need want to change their focus, either to switch to a different year or to a different school. There are two ways to change the focus.

Method 1

1. Click on the **focus area**. The Select Focus screen pops-up.

Figure 1-5 Focus Area

2. To change to a different school year, select the year from the **Focus Year** drop-down list.
3. To change to a different school, click on the **school** in the Select Focus Organization section. The focus may be set to the district or other organizational grouping, however, student information may only be edited when focused at a school. Information may be screened at the district or other organization group level, but it cannot be changed.

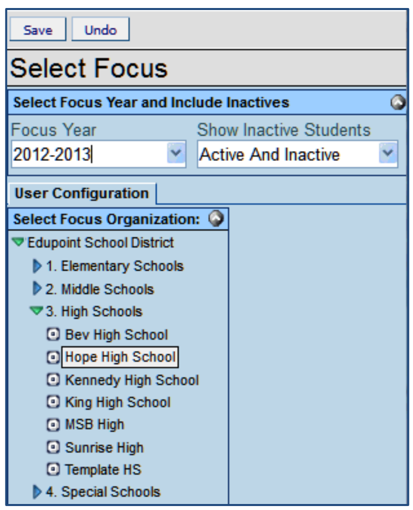


Figure 1-6 Select Focus Screen

4. To change the group of students displayed, select the group from the **Show Inactive Students** drop-down list.
5. Click the **Save** button at the top of the screen to save the changes, or click the **Undo** button to revert to the original focus.

Method 2

Figure 1-7 Quick Focus

1. Click the **Quick Focus** button. The Quick Focus selection slides open. The same selections are available on the Quick Focus as on the Select Focus screen.

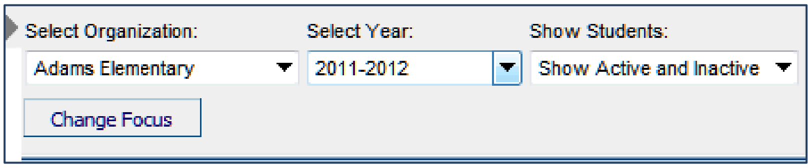


Figure 1-8 Quick Focus Screen

2. Use the drop-downs to make selection changes.
3. Click  when finished. Quick Focus slides closed.
4. If no changes were made, click . Quick Focus slides closed.

Action Bar

The Action Bar contains icons, buttons, and indicators for various functions specific to a screen currently displayed.

Figure 1-9 Action Bar

1. **Menu** – The menu contains a drop-down list of actions for the screen, reports, and the audit report for the current screen.
2. **Previous** – This scrolls to the previous record in the screen. Records are sorted in alphabetical order by the first field in the screen, so Previous scrolls through the records in descending order by this field.
3. **Switch to Find Mode** – This switches the screen to find records instead of screening or editing the records. The fields in the screen will become yellow in Find Mode.
4. **Next** – Next scrolls to the next record in the screen. Records are sorted in alphabetical order by the first field in the screen, so Next scrolls through the records in ascending order by this field.
5. **Print** – This prints the current screen as shown on the screen.
6. **Save/Find/Edit** – This button changes as the screen is set in different modes. In Inquiry mode, an Edit button switches the screen so that the record can be changed. In Find mode, it is a **Find** button that searches for records that match the information entered in the screen. In Edit mode, it is a **Save** button to save any changes made to the record in the screen.
7. **Undo** – Undo reverses any changes made to the data in the record in the screen.
8. **Add** – This opens a screen for adding records to the current screen.
9. **Delete** – This deletes the current record from the screen. Deletions cannot be reversed.
10. **Notification** – An icon appears here to alert users when a student record has a special notification attached to it, such as a medical condition.
11. **Form Status** – This lists the current status of the screen. **Ready (Update Mode)** means the record can be edited, **Ready (Inquiry Mode)** means the record can be screened but not changed, and **Find** means the screen is in Find mode where the screen can be used to search for records.
12. **Refresh** – This refreshes the data in current screen.
13. **Detach** – This opens the screen in a separate browser window. In a detached screen, all of the normal functions in the screen still work such as entering information in fields. An unlimited number of detached screens may be opened.
14. **About** – This shows information about the screen.

15. **Context Sensitive Help** – This button opens a window with help for the current screen

TITLE AREA

The Title Area contains the name of the current screen, the Filter, the button to expand and close the Quick Nav Bar, and the Quick Nav Bar itself.

Figure 1-10 Title Area

- **Filter**

  The Filter icon is a funnel to the left of the title of the screen. The filter uses a custom query to filter the records displayed in the screen. For more information about creating and using filters, please refer to the *Synergy SIS – Query & Reports Guide*.

- **Screen Name**

  The name of the screen is always displayed in the title area of each screen. The Screen Name can be used in the Quick Launch bar to navigate, quickly, to a particular screen.

- **Quick Nav**

  The Quick Nav bar stores icons for screens selected by the user as shortcuts. The icons in the Quick Nav can be displayed or hidden by clicking the or . To expand the QuickNav Bar, click on the button. The shortcut icons are displayed and the button changes to . To collapse the QuickNav Bar, click on the button. The icons are hidden and the button changes back to . For more about the QuickNav bar, please see the section on The Four Navigation Options in this chapter.

CONTENT AREA

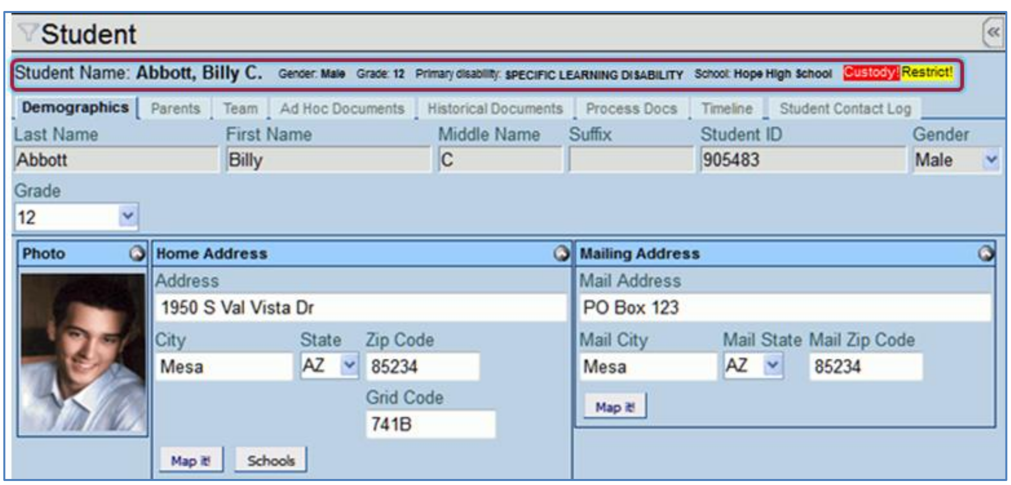


Figure 1-11 SE Student Screen Content Area

The Content Area displays the records available for the screen. At the top of most content areas, a line of general information about the record selected is displayed. Content areas may display one or more tabs of information. The information in each tab must be saved before proceeding to another tab.

When the Content Area is in Find mode, the fields are yellow. Information entered when a field is yellow will be used as criteria when searching for records.

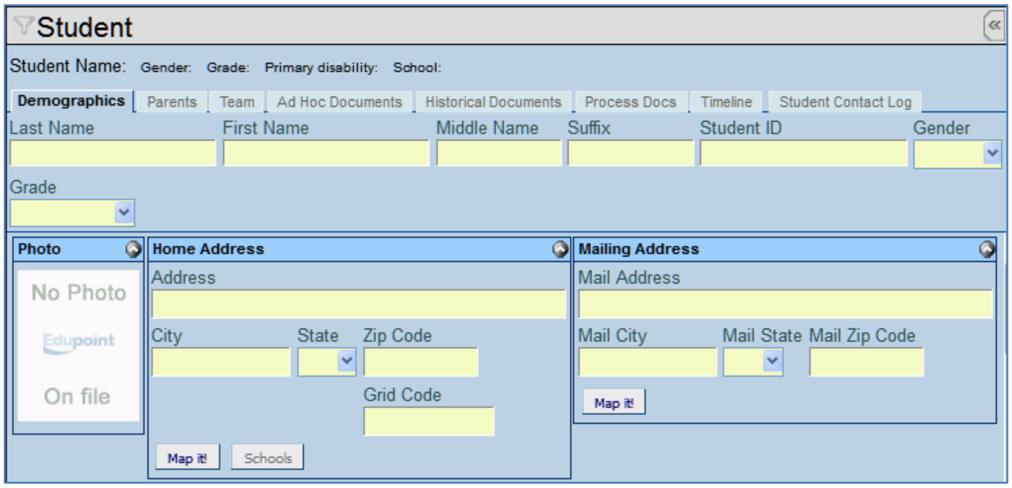


Figure 1-12 Content Area Find Mode

When the Content Area is in Edit mode, fields that can be edited have a white background. Fields that cannot be edited have a gray background.

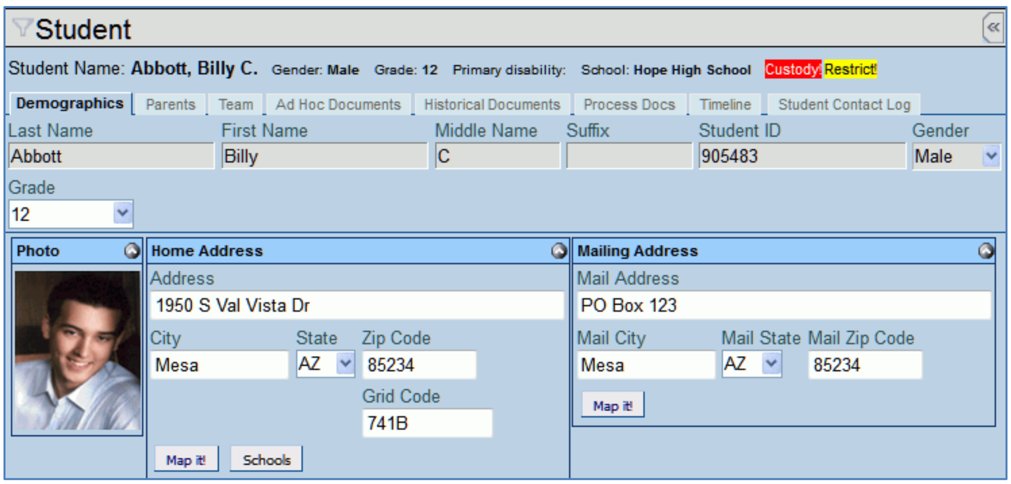


Figure 1-13 Content Area Edit Mode

When adding a record, fields that have a green background are required to be completed before the record can be saved.

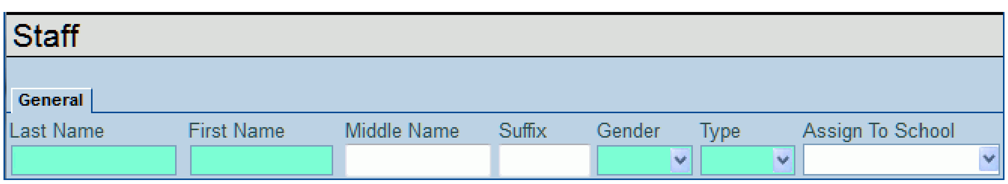


Figure 1-14 Content Area Add Record

THE FOUR NAVIGATION OPTIONS

There are four options for navigating within Synergy SE.

Toolbars

Ideal for the screens and reports accessed daily. Some toolbar groups are created by the system administrator, or users can create their own.

Navigation Tree

Lists all the reports and screens to which a user has access.

Quick Nav Bar

Similar to the Toolbars, it is a great place for the screens used daily. The Quick Nav bar is more helpful as users become familiar with the icons for the different screens, and it can store more screens at a glance than a Toolbar.

Quick Launch

The Quick Launch is helpful for experienced Synergy SE users. A screen or report can be opened by typing either the ID of the report or the name of the screen.

Figure 1-15 SE Student Icon

Each icon in any of these options represents one of two types of content – screens and reports. Screens allow users to work with the data in the system. They are indicated by an icon illustrating the function of the screen. For example, an icon of a student links to the Student screen.

Reports are indicated by the same icon. There is not one single area in Synergy SE for reports.

Figure 1-16 Report Icon

Instead, reports are grouped into the appropriate folder. For example, reports regarding staff can be found in the Staff folder.

TOOLBARS

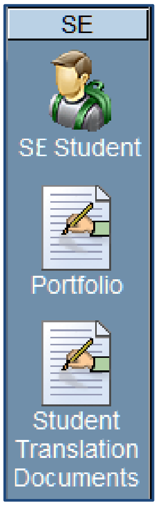


Figure 1-19 Synergy SE Toolbars

The toolbars are a great place for storing frequently used screens and reports. Multiple toolbars can be created to organize the screens and reports into related groups. The system administrator can create toolbar groups, or users can create their own groups. The users cannot change groups created by the system administrator, which are indicated with a Lock icon following the group name.

1. To access a screen or report from a toolbar, just click on the icon.
2. To open the screen or report in a new "detached" window, right-click on the icon and choose **Open Window**.

   If multiple toolbars exist, inactive toolbars are listed by their group name at either the bottom or top of the active toolbar group.
3. Click on the group name to switch between toolbar groups.

   If more icons exist in a group than can be displayed on the screen, a scroll bar is displayed to scroll up and down to see all the screens and reports.

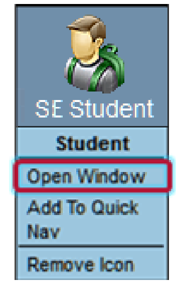


Figure 1-17 Open Screen in Separate Window

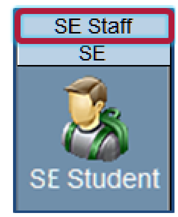


Figure 1-18 Multiple Toolbars

To create a custom toolbar group:

1. Right-click on a **group name** and a drop-down menu appears.
2. Choose **Add New Group**.
3. Type a **name** for the new group in the box.
4. Click **Save**.
5. Right-click on the **group name** and choose **Rename GROUP,** if desired.
6. Right-click on the **group name** and choose **Delete GROUP,** if desired.

Figure 1-20 Add New Group

To add icons to a group:

Make sure both the Toolbars and the Navigation Tree are open.

1. Click on the **screen name**, and drag it to the group. Alternately, right-click on a **screen** or **report** in the Navigation Tree and choose **Add to group …** from the drop-down menu.
2. Repeat as needed with other reports or screens to be added into the group. The icons in the group may be rearranged by dragging them to the desired position.
3. Right-click on the **icon** you want to delete to remove icons from a group.
4. Click **Remove Icon.**

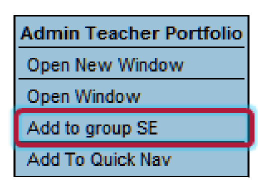


Figure 1-21 Add Screen to Group

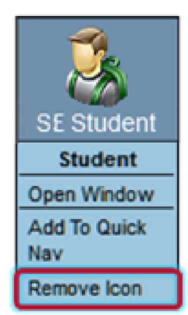


Figure 1-22 Remove Screen from Toolbar

Navigation Tree

The Navigation Tree lists all screens or reports to which the user has access. To use the Tree:

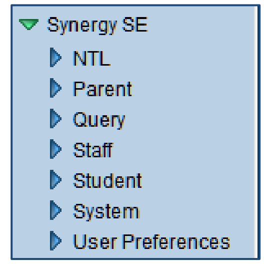


Figure 1-23 Synergy SE Navigation Tree

1. Click on the **blue triangle** to expand the folder next to the triangle. When a triangle has been clicked, it turns green and points downward.
2. Continue clicking on the triangles until the desired screen or report is displayed.
3. Click on the **screen name** or **icon** to show it in the Content Area.
4. To open the screen to a new "detached" window:
5. Right-click on the **screen name** or **icon**. A drop-down menu appears.
6. Select **Open New Window**. The Open Window option in the drop-down menu opens the screen in the Content Area.

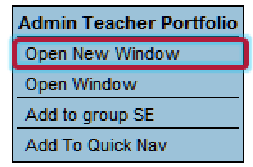


Figure 1-24 Navigation Tree Drop-Down Menu

Quick Nav Bar

The Quick Navigation or Quick Nav bar is located in the right part of the Title Area of the screen.

Figure 1-25 Quick Nav Bar Closed

One of the advantages of using Quick Nav is that the screens that are activated are "detached", or opened in a new window. This means that several screens can be open at the same time. The detached screens can even be the same screen but with different records open at the same time.

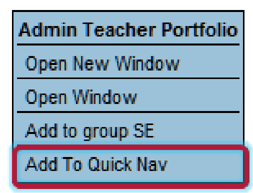


Figure 1-26 Add Icon to Quick Nav Bar

1. Right-click on the **screen name** or **icon** either in a Toolbar or in the Navigation Tree to add an icon to the Quick Nav bar.
2. Choose **Add to Quick Nav**.
3. To remove an icon, right-click on it, then select **Remove Icon**.
4. Click , the toolbar slides open to view.

Figure 1-27 Quick Nav Bar Open

5. Click again to close.

Quick Launch

The Quick Launch bar is turned on and off for each user in the User screen by the system administrator. It provides a quick way to "launch" a screen or report by simply typing the name of the screen or ID of the report in the box.

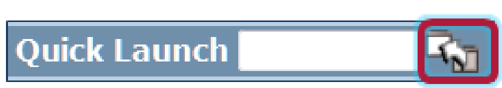


Figure 1-28 Quick Launch Bar

1. To open the screen or report in the Content Area, type the name of the screen or ID of the report in the box and then press **Enter**.
2. To open the screen in a new window, click the **Detach** button to the right of the box instead of pressing the Enter key.

The information entered in the box is either the Report ID (CAS01, in the example below) or the name of the screen (Portfolio, in the example below). This information can be found in the Navigation Tree.

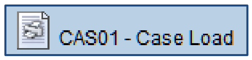


Figure 1-29 Quick Launch Report Info

Figure 1-30 Quick Launch Icon Info

KEYBOARD SHORTCUTS

These keyboard shortcuts are helpful to quickly move through the screens in Synergy SIS, particularly when entering a large amount of records.

COMBINATION KEYS	ACTION
Control + A	Add
Control + S	Save
Control + D	Delete
Control + F	Find
Control + Z	Undo
Control + Right Arrow	Scroll Fwd 1 Record
Control + Down Arrow	Scroll Fwd 1 Record
Control + Left Arrow	Scroll Back 1 Record
Control + Up Arrow	Scroll Back 1 Record
Up Arrow	Scroll Up (screens/lists)
Right Arrow	Scroll Up (lists)
Down Arrow	Scroll Down (screens/lists)
Left Arrow	Scroll Down (lists)

Figure 1-31 Keyboard Shortcut Chart

MANAGING YOUR SYNERGY SE ACCOUNT

If the security settings in Synergy SE allow for it, there are several areas you can customize your account. You can change the home page, setup a custom dictionary for checking your spelling in fields, and you can edit your address and phone information. To modify your settings:

Figure 1-32 Synergy SE Navigation Tree

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

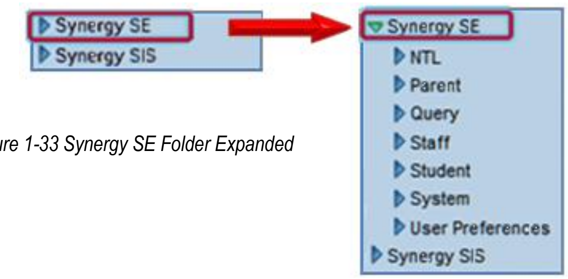


Figure 1-33 Synergy SE Folder Expanded

2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or the **blue triangle** 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 **User Preferences** or click on the blue triangle pointing right next to it.

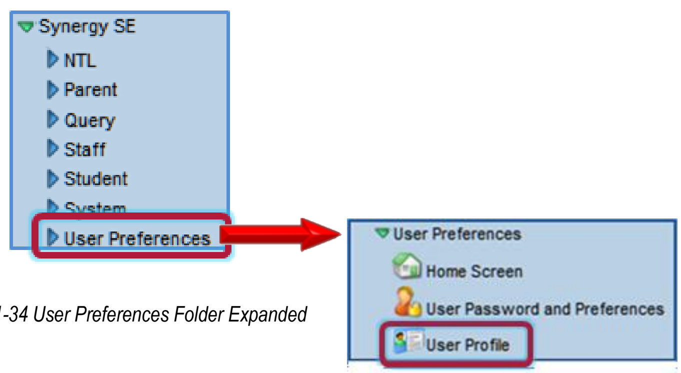


Figure 1-34 User Preferences Folder Expanded

4. Click on the **User Profile** screen.

On the first tab of the User Profile screen, the Demographics tab, you can see your home address and phone information.

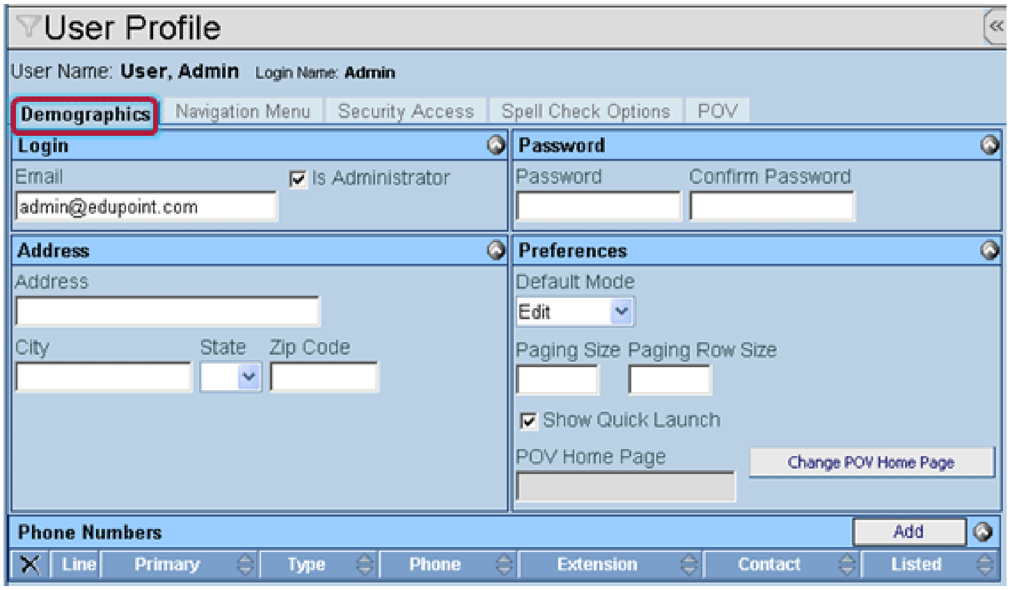


Figure 1-35 User Profile Screen

1. To make changes to this information, change to Update mode by clicking the **Edit** button at the top of the screen. If the button is not available, Update mode is already turned on.

Figure 1-36 Edit Button

The current mode is indicated by Form Status, in the top right-hand corner of the screen.

Figure 1-37 Current Form Status

2. Once in Update mode, you can change your address simply by clicking in the boxes and modifying the text in the **Address**, **City**, **State** and **Zip Code** boxes. You can modify your **E-mail** address.
3. To add a new phone number, click on the **Add** button in the Phone Numbers section. A new line is then added where the new phone number information can be entered.

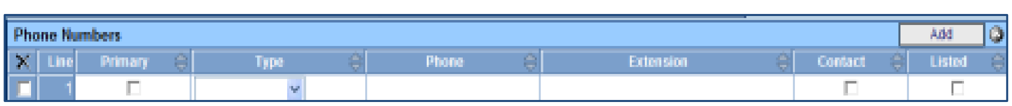


Figure 1-38 Phone Numbers Section

4. Check the box in the **Primary** column for the primary phone number that should be used to contact you.
5. Select the **Type** of phone from the drop-down list, and enter the phone number in the **Phone** column. If there is an extension to reach you, enter it in the **Extension** column.
6. If this phone number can be used to contact you, check the **Contact** box. If the number is listed in the phone directory, check the **Listed** box.
7. To remove a phone number, check the box in the **X** column.

8. To change your Synergy SE password if you are not using your network account to access Synergy SE, enter the new password in the **Password** and **Confirm Password** boxes.
9. Select the **Default Mode** to be used when looking at a screen in Synergy SE from the drop-down list.

When you are in Inquiry mode, all screens are set to read-only. You can still edit records by clicking on the **Edit** button at the top of the screen, but the records are switched back to read-only mode when you change to a new screen. Inquiry mode can help prevent accidental edits to the records, but can add an extra step for data entry personnel who constantly edit records. Edit mode, which opens screens for updating, may be a better choice for these staff.

Increase the Paging Size and Paging Row Size settings to change pages less frequently. This may slow the searches slightly since more records are returned.

1. Enter a **Paging Size** number to change number of pages displayed at the bottom of a search. Default is 15.
2. Enter a **Paging Row Size** number to change number of records displayed on one page. Default is 20 rows.
3. To display the Quick Launch box in the Title Bar, check the **Show Quick Launch** box. The POV Home Page is the initial screen that is displayed in the Content Area when you first logon to Synergy SE. By default, this is the Synergy SE home page which displays announcements, a task list, and the dashboard widgets.
4. To change this page to another screen, click on the **Change POV Home Page** button.

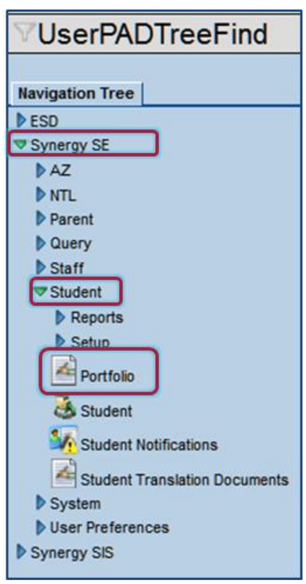


Figure 1-39 UserPADTreeFind Screen

5. The UserPADTreeFind screen pops-up. Click on the **blue triangles** next to each folder name to navigate to the screen to be used for the home page.
6. Once the screen is located, click on the **name of the screen** to use as the home page and click the **Select** button at the top of the screen.
7. When you have finished your changes, click the **Save** button at the top of the screen to save your changes or click the **Undo** button to cancel the changes.

ADD A NEW TOOLBAR

Custom toolbars can be modified on the Navigation Menu tab of the User Profile screen. Make sure nothing is selected (highlighted) under the Navigation Menu. If it is, click on the words **Navigation Menu** to de-select.

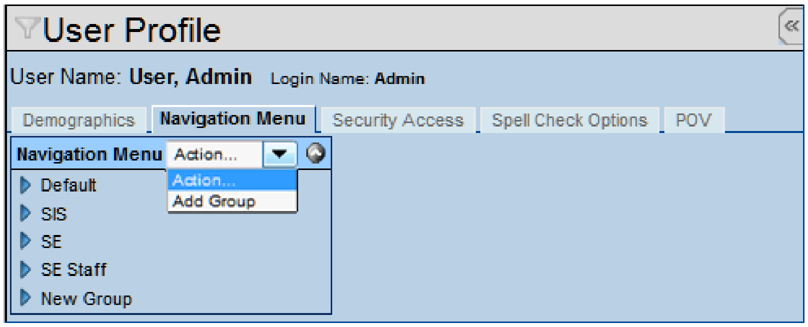


Figure 1-40 User Profile Screen Navigation Menu Tab Add Group

1. Click the **Action…** drop-down and select **Add Group**. The GroupAddDetail screen opens.

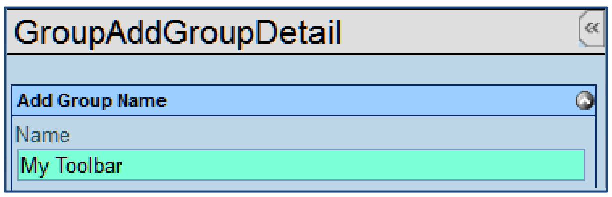


Figure 1-41 GroupAddItemDetail Screen New Navigation Group Screen

2. Enter a **name** for the toolbar and click the **Save** button. The new group displays in the Navigation Tree.
3. The new group order can be adjusted. Click the **line number** of the group to highlight.
4. Click Move Up or MoveDown.
5. Repeat until the groups are in the desired order.
6. Check the box in the **X** column next to the item to delete it if desired.
7. Click **Save** at the top of the screen.

Add Screens, Reports, and Links to a Group

1. Click the **Group name** desired under the Navigation Menu. The name will highlight.
2. Click the **Action…** drop-down and make selection. The GroupAddItemDetail screen displays.

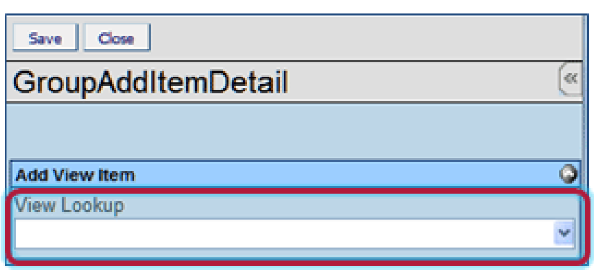


Figure 1-42 GroupAddItemDetail Screen View Lookup

3. Click the **View Lookup** drop-down.

4. Click the **arrows** to scroll through the screens.

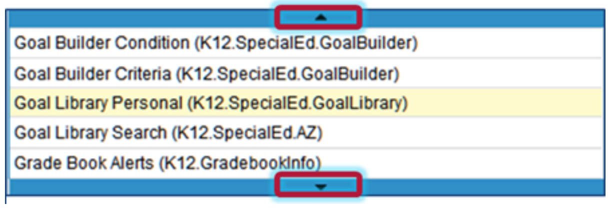


Figure 1-43 Screen Lookup List

5. Click on the **name** to select.
6. Click **Save** at the top of the screen to add the screen. The GroupAddItemDetail screen closes and the new item (screen, report, or link) displays under the Group

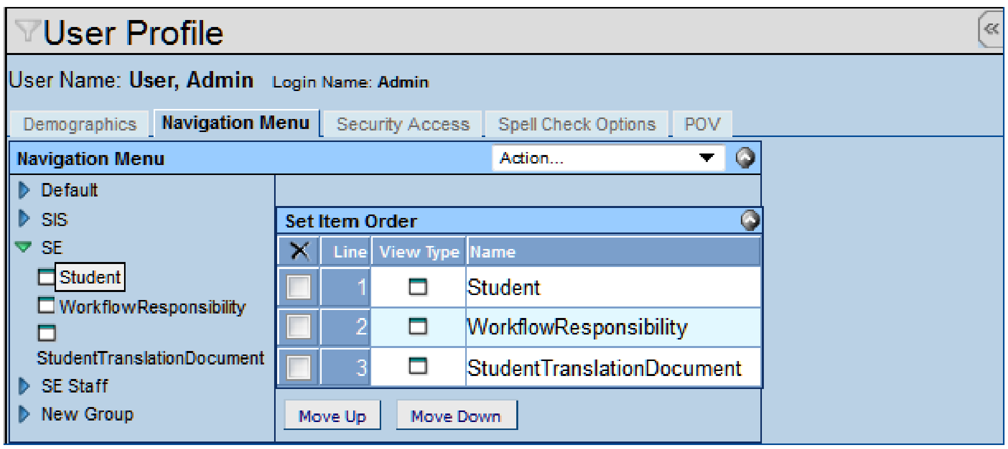


Figure 1-44 User Profile Add Item

Set Item Order

If there are multiple items in a Group, the order of the items can be adjusted.

1. Click the **line number** of the item to highlight.
2. Click Move Up or Move Down.
3. Repeat until items are ordered as desired.
4. Check the box in the **X** column next to the item to delete it, if desired.
5. Click **Save** at the top of the screen.

VIEW SECURITY SETTINGS

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

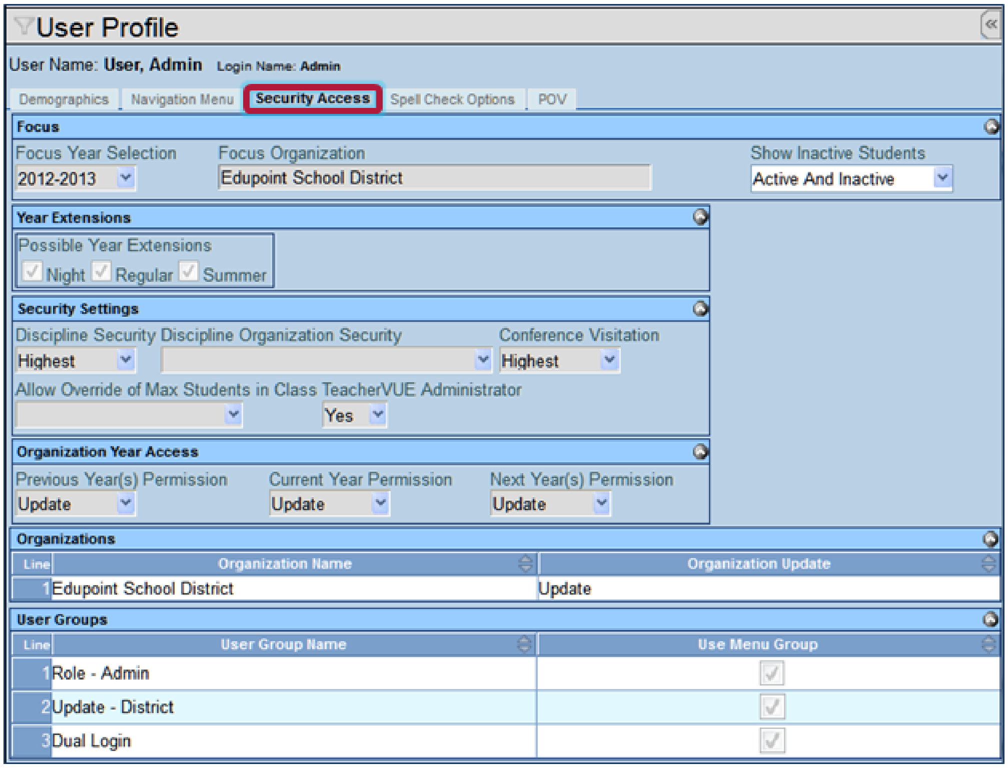


Figure 1-45 User Profile Screen Security Access Tab

SPELL CHECK OPTIONS

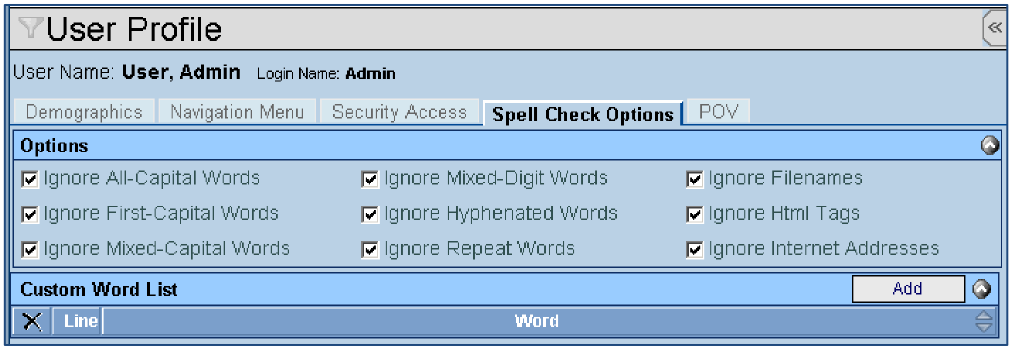


Figure 1-46 User Profile Screen Spell Check Options Tab

1. Click on the **Spell Check Options** tab.
2. Check or uncheck the **Options** available for the spell check.
3. Custom words can be added to the standard dictionary. For example, adding the name of the district and/or schools would probably be helpful. To add a custom word, click the **Add** button in the Custom Word List section.
4. A new line appears. Type the new **word** in the Word column.

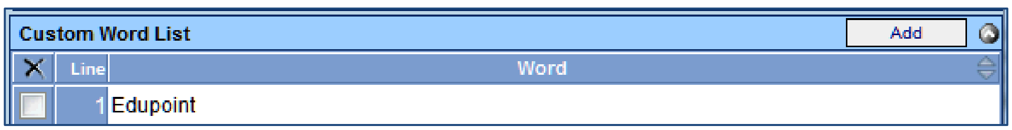


Figure 1-47 Custom Word List

5. To delete a custom word, check the box in the **X** column.
6. Click the **Save** button at the top of the screen to save the changes.

Dashboard Widget

A Dashboard Widget is a graphical reporting tool designed to track student data trends. These widgets appear on the Synergy SE home page to give the users an overview of different trends occurring in either the school or the district. Widgets can track enrollments by day, attendance patterns, or grades. They can link to external sources of web-based information such as images or RSS feeds. Widgets need to be setup by your system administrator.

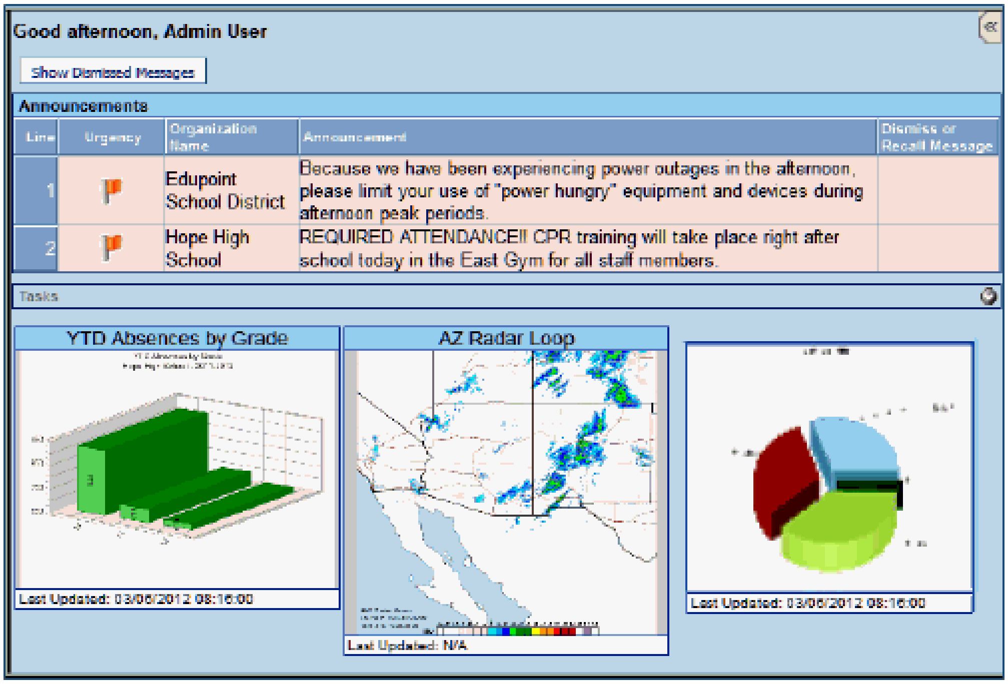


Figure 1-48 Home Page Dashboard Widgets

Add Widgets

1. Click on the **POV tab**, and enter the number of dashboard widgets (also called dashboard controls) to appear in each row of widgets in the **Dashboard Controls Per Row** box.

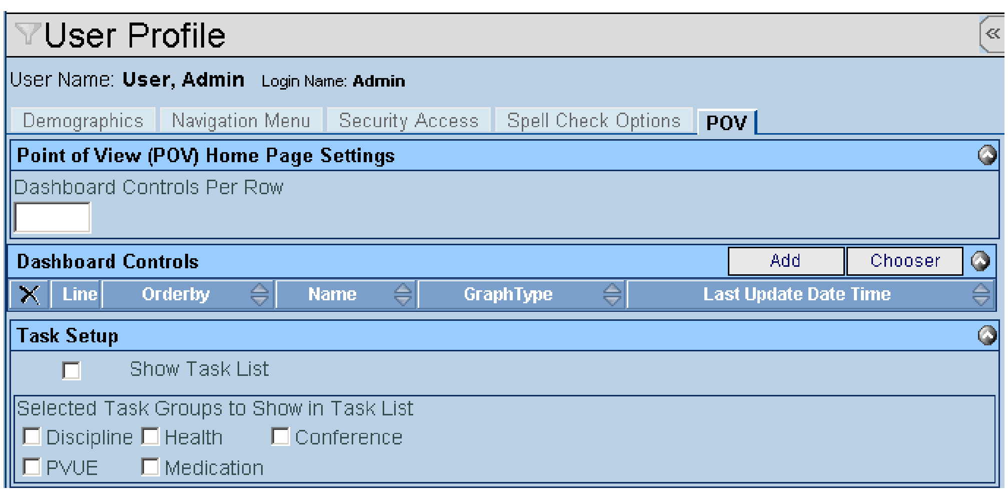


Figure 1-49 User Profile Screen POV Tab

Note: Regardless of the number of Dashboard Controls per Row setting, a RSS Feed widget always takes the entire row.

2. Dashboard widgets can be added to the home page one at a time using the Add button, or multiple widgets can be added using the Chooser button. To add a single widget, click the **Add** button.

Figure 1-50 Dashboard Controls Grid

3. The Find Dashboard Widget screen pops-up. Enter all or part of the **Name** of the widget and/or select the **Graph Type** to search for a specific widget and click the **Find** button at the top of the screen.

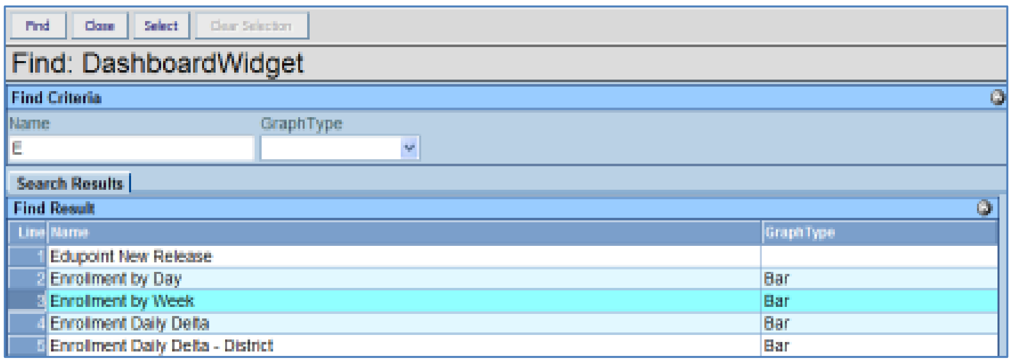


Figure 1-51 Find Dashboard Widget Screen

4. The list of widgets that meet the criteria entered are listed in the Find Result grid. Click on the **widget** to add, and it will be highlighted in blue. To add it to the home page, click the **Select** button at the top of the screen. The widget will be added to the Dashboard Controls grid.
5. To add multiple widgets, click the **Chooser** button. The Chooser screen pops-up.

Figure 1-52 Dashboard Controls Grid Widget Added

6. Enter all or part of the widget **Name** and/or select the **Graph Type** to search for a specific widget and click the **Find** button at the top of the screen. The list of widgets that meet the criteria entered are listed in the Find Result grid.

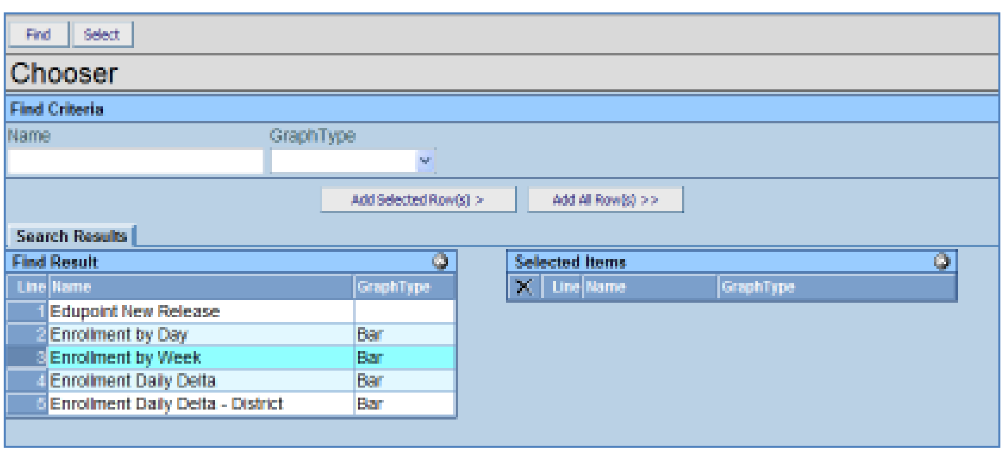


Figure 1-53 Chooser Screen Find Result

7. Click on a **widget** to add, and it becomes highlighted in blue. To select multiple widgets, hold down the **Shift** button and click on all the **widgets** needed.

8. Once all of the widgets to add are highlighted in blue, click the **Add Selected Row(s)>** button to add the widgets to the Selected Items grid. To add all of the widgets listed, click the **Add All Row(s)>>** button. To remove a widget from the list of Selected Items, check the box in the **X** column.
9. Once all of widgets needed have been selected from current Find Result, another Find can be conducted. Enter different criteria, click the **Find** button and repeat above procedure.
10. Once all of the widgets are listed, click the **Select** button to add them to the Dashboard Controls grid.
11. The order in which they appear in the row on the home page can be modified by entering the order to display them in the **Order By** column.

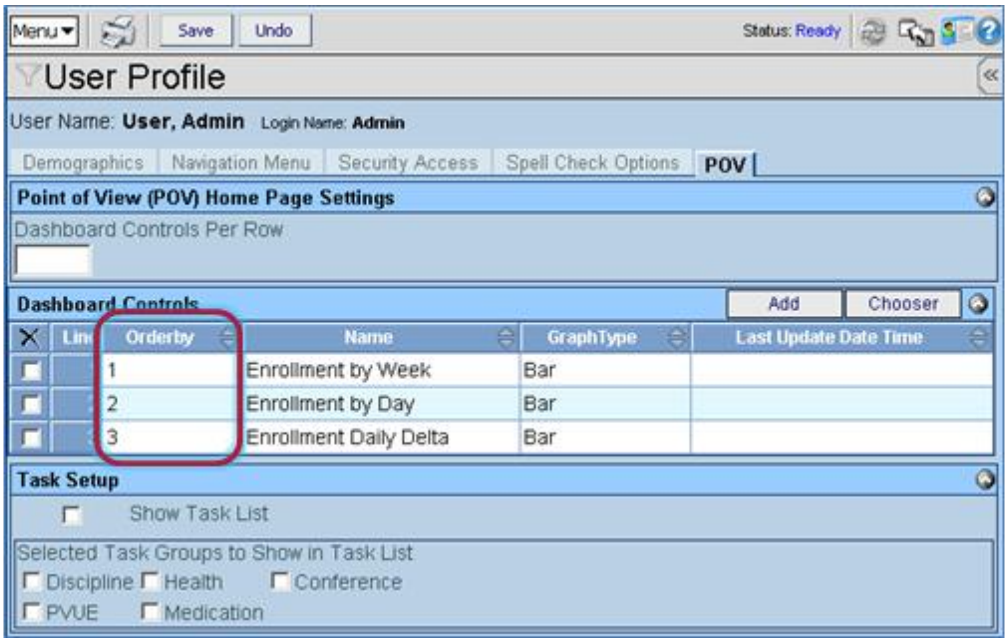


Figure 1-54 *User Profile Screen Order By & Deleting*

12. To remove a widget from the home page, click the box in the **X** column.
13. Click the **Save** button at the top of the screen to save the changes.

TASKS

Tasks provide a "to-do" list on the home page of Synergy SE. For example, a task may be listed to remind a school nurse when to administer medication to a student or a counselor may have conference reminders. Tasks that are displayed may vary upon the user's group and individual user preferences. The tasks are generated once a day.

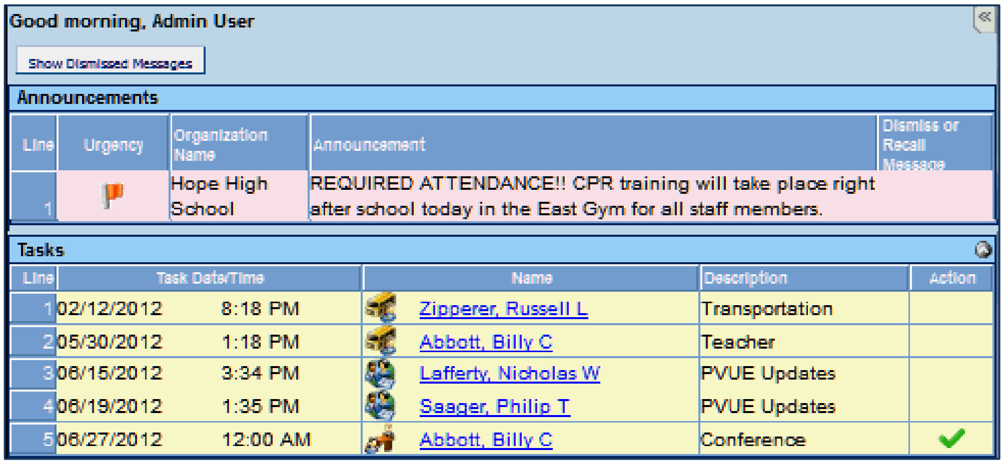


Figure 1-55 Synergy SE Home Page Tasks Displayed

Display a Task List

1. Click the **POV tab** of the User Profile screen.
2. Check Show Task List.

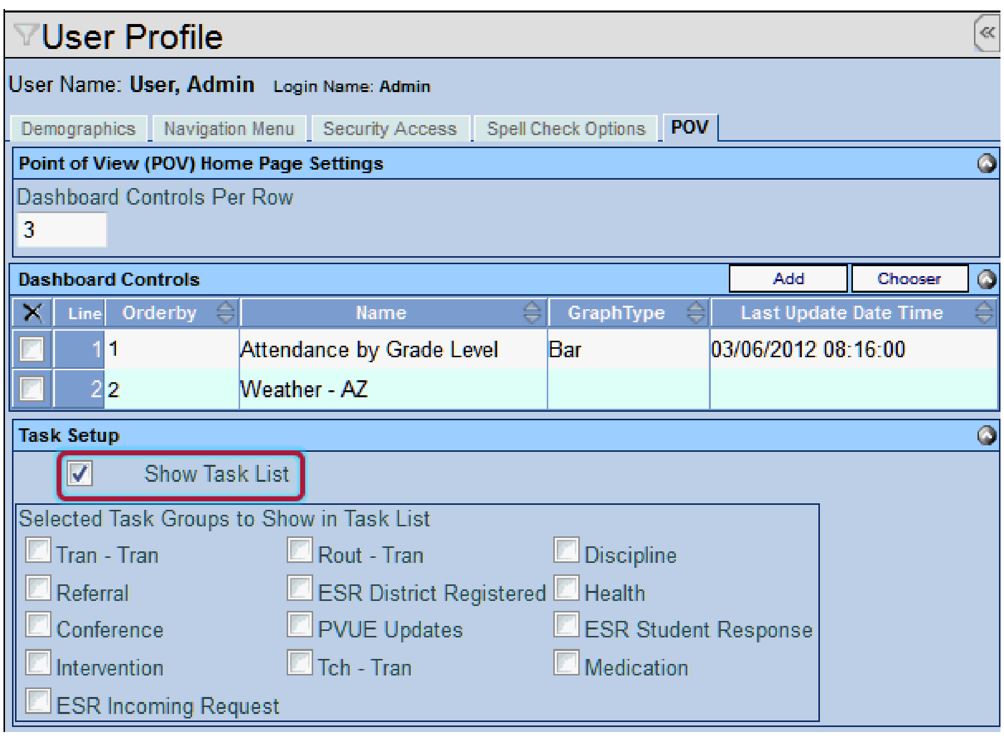


Figure 1-56 User Profile Screen POV Tab

3. Check the desired tasks to display in the **Selected Task Groups to Show in Task List**.
4. Click the **Save** button at the top of the screen to save the changes, or click the **Undo** button to reverse them.

Change Password

1. Click on the User Password and Preferences screen, found under the User folder.

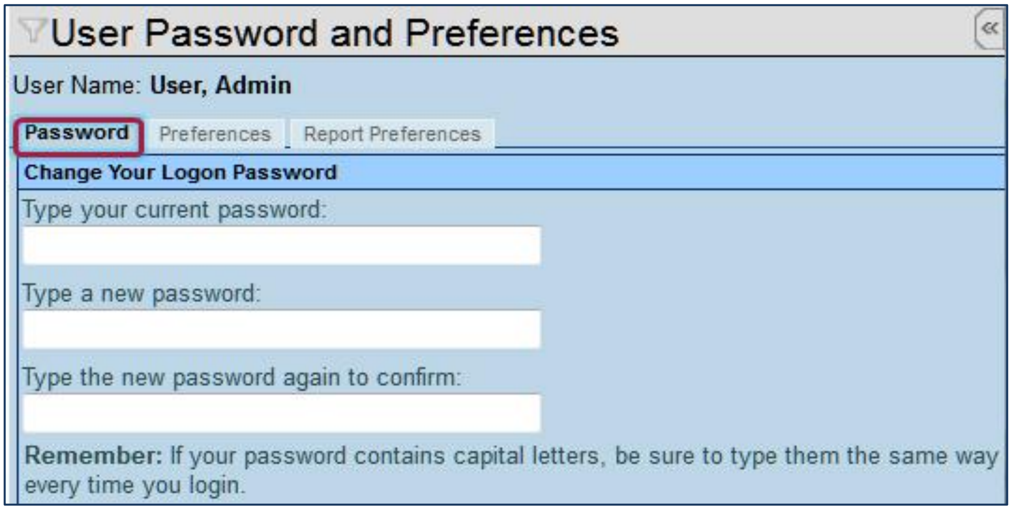


Figure 1-57 User Password and Preferences Screen

2. Follow the on-screen directions.
3. Click the **Save** button at the top of the screen to save the new password.

Modify Preferences

Use the Preferences tab to customize the number of pages displayed in a search, the number of records displayed on a page, to change the POV Home Page and to change your preferred logon application (if available.)

1. Click on the **Preferences** tab.

Use Paging Preferences to increase the number of records in view and change the pages less frequently. This may slow the searches slightly since more records are returned.

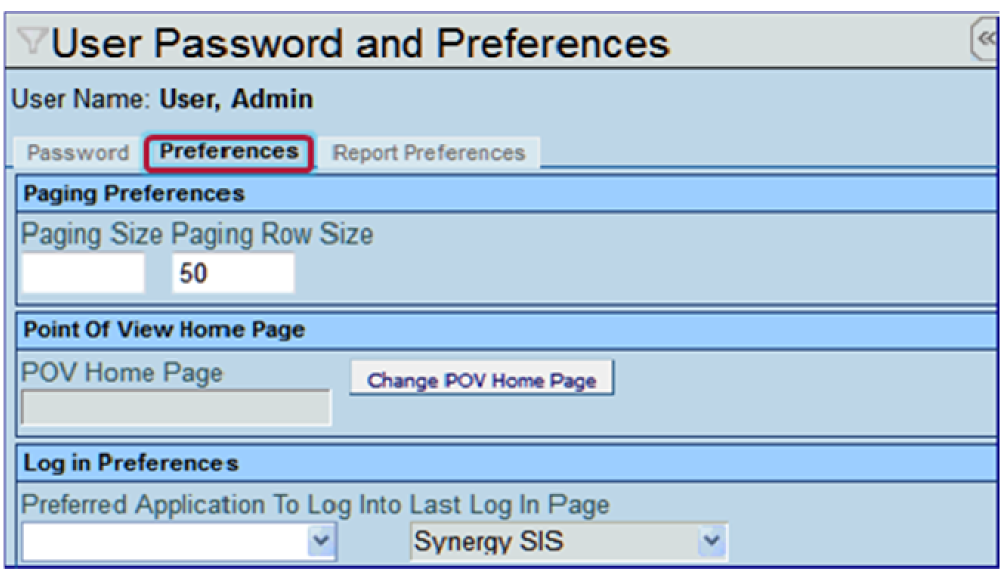


Figure 1-58 User Password and Preferences Screen Preferences Tab

2. Enter a **Paging Size** number to change number of pages displayed at the bottom of a search. Default is 15.

3. Enter a **Paging Row Size** number to change number of records displayed on one page. Default is 20 rows.

The Point of View Home Page is the initial screen displayed in the Content Area when you first logon to Synergy SE. By default, this is usually the Synergy SE home page which displays announcements, a task list, and the dashboard widgets.

1. Click Change POV Home Page to change to another screen instead of the default Synergy SE home page. UserPADTreeFind screen opens.
2. Click next to the names to expand the folder contents.
3. Navigate to the desired screen.
4. Click on the **name of the screen** to use as the home page
5. Click Select. The screen name will display in POV Home Page field.
6. If you have access to both TeacherVUE and Synergy SE, you can select which application appears first in the Log In Preferences.
7. Click the **Preferred Application To Log Into** drop-down and select.
8. Click the **Save** button at the top of the screen.

REPORT PREFERENCES

1. Click the **Report Preferences** tab to modify your report preferences.
2. Check the desired preferences for the various report profiles.
3. Click the **Mask Phone Numbers** drop-down and select to mask or show unlisted phone numbers on reports.

The IDS801 Preferences refer to the printable Disciplinary Action Form located on the Student Incident Detail tab in the detailed view of Discipline Incident > Student Incident > Discipline tab. The form contains an acknowledgement statement in the Signatures box that may be customized, if desired

4. Check **Use Custom Acknowledgement Text** and enter desired message. Use to spell check. Use for more space.
5. Click the **Save** button at the top of the screen.

Figure 1-59 User Password and Preferences - Report Preferences Tab

Chapter Two: FINDING & SORTING RECORDS

In this chapter, the following topics are covered:

- Scrolling to find records
- Searching by the primary field
- Searching using multiple fields
- Searching using the find results grid
- Sorting records

SCROLLING TO FIND RECORDS

Use the Scroll buttons to scroll through the records until the desired records are located.

Note: The examples in this chapter show how to search within the SE Student screen, but these same techniques will work in any screen in Synergy SE.

To scroll through the records to find the desired record in the Student screen:

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

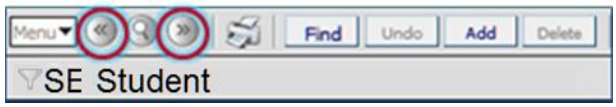


Figure 2-1 Scroll Buttons

2. To scroll in reverse alphabetical order by the first field on the screen, click the left **Scroll** button.
3. Continue clicking on the **Scroll** buttons until the desired record appears.

Note: The records that are available when scrolling or finding are controlled by the focus set in the upper right-hand corner of the screen. For example, if the focus is set to only show active students, an inactive student's records cannot be found by scrolling or finding. The focus would need to be changed to display inactive students for an inactive student's record to appear when scrolling or finding records.

SEARCHING BY THE PRIMARY FIELD

While scrolling can be a good way to find a specific record in a small group of records, it can be cumbersome to scroll through many records. Using Find mode can make it easier to find the exact record when searching through large groups of records. To switch to the Find mode to look for the student records:

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

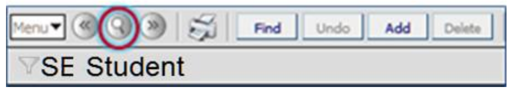


Figure 2-2 Find Mode Button

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

When the Find Mode button is clicked, all data is cleared from the screen so be sure to save any changes before switching the Find Mode. The fields are then displayed in yellow to indicate that the screen is in Find Mode. The Form Status at the top of the screen will indicate Find.

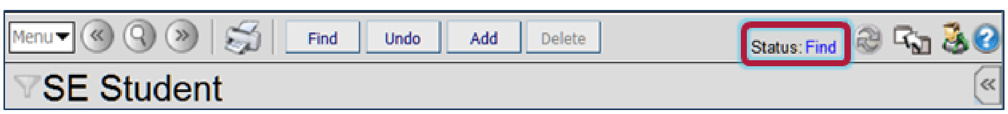


Figure 2-3 Screen in Find Mode

2. Enter either the whole last name or the first part of the last name of the student in the Last **Name** box.
3. Click the **Find** button or press the **Enter** key.

If there is not a last name that contains the letters entered, the next record closest to the searched name displays.

If the letters entered for the last name match all or part of a student's last name, the first student with the last name matching what has been entered into the Find screen, displays. For example, if the last name "Doe" was entered and more than one student has the last name Doe is available, the screen would show Jane Doe's information, since Jane Doe is alphabetically listed before Janet Doe.

4. Use the scroll buttons to find the other students with the same last name.

If the letters entered match the first part of a student's last name, that record displays, if no record matches the exact letters entered. For example, if Doe was entered but no students had the last name of Doe, it would show a student named Doerner instead. If the letters entered don't match the first part of a last name but they are contained in another last name, that name is displayed. For example, if Der is entered and no last names begin with Der, the first record with a last name containing those letters is displayed such as Moldero.

Searching Using Multiple Fields

In some instances, it may be helpful to use more than one piece of information to search for a student. For example, there may be several students with a last name of Smith. To search for students using multiple fields:

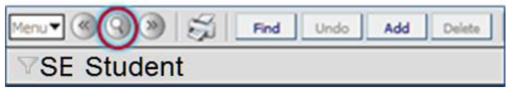


Figure 2-4 Find Mode Button

1. Click on the **Find Mode** button.
2. Enter all or part of the student's **Last Name** and all or part of the student's **First Name** in the screen.

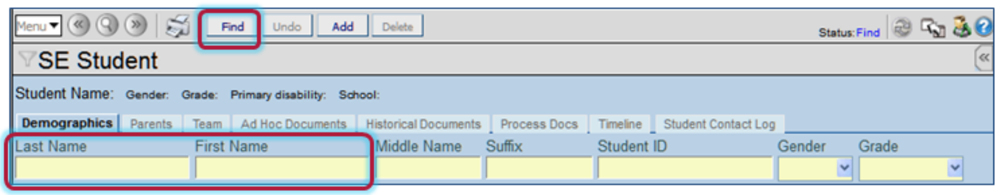


Figure 2-5 Finding by Last and First Name

3. Click the **Find** button or press the **Enter** key.

The first student who matches the last name and first name entered appears. For example, if the last name Smith was entered and only J for the first name, it would pull up John Smith's record before Juan Smith's record.

If the last name exists but no student has a matching first name, the first student whose first name contains the letters entered for the first name. For example, if Smith, R was entered but no student had a first name that began with R it would pull up Harry Smith's records.

If no last name contains the letters entered, the next record closest to the searched name will appear.

Note: While any or all fields may be completed to search for a student, it's generally best to start with just the last name to see if matching records exist at all. Other searches can then be conducted with additional information to narrow down the number of records.

SEARCHING USING THE FIND RESULTS GRID

As long as some information is entered in the primary field, Find mode will always try to match the criteria entered to a specific record in the Synergy SE database and bring up the record in the main screen. However, two other methods of searching can bring up a list of records in a grid where the record can be selected manually. This grid is called the Find Results grid.

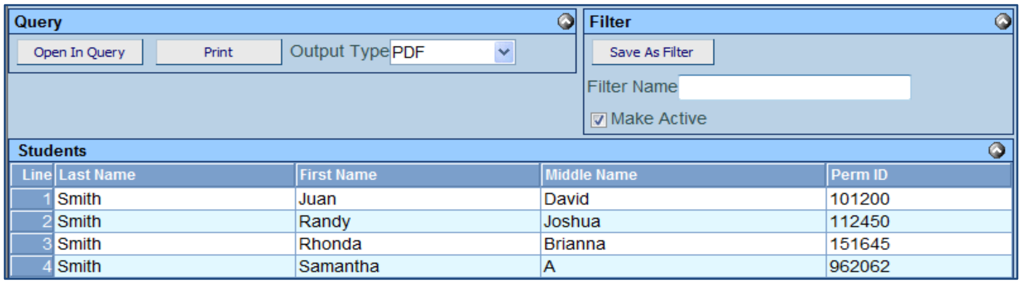


Figure 2-6 Find Results Grid

The Find Results grid will appear anytime either nothing is entered in the Primary field for the screen, or if an asterisk is placed in any field. To search using secondary fields instead of the primary field:

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

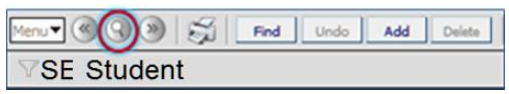


Figure 2-7 Find Mode Button

2. Enter all or part of the search criteria on any field or fields, on any tab, *except* the primary field. For example, enter the student's **First Name** to list all students with that first name.

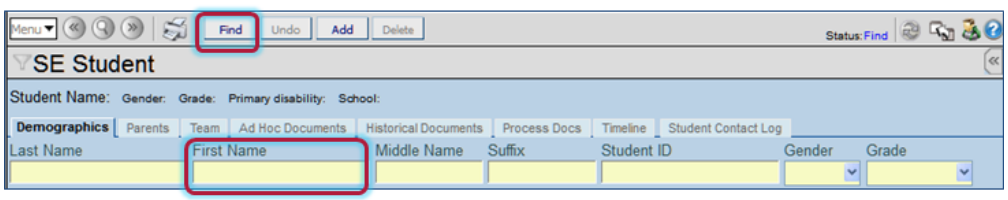


Figure 2-8 Finding by First Name

3. Click the **Find** button or press the **Enter** key. The Find Results screen pops-up listing all students that match the entered criteria.

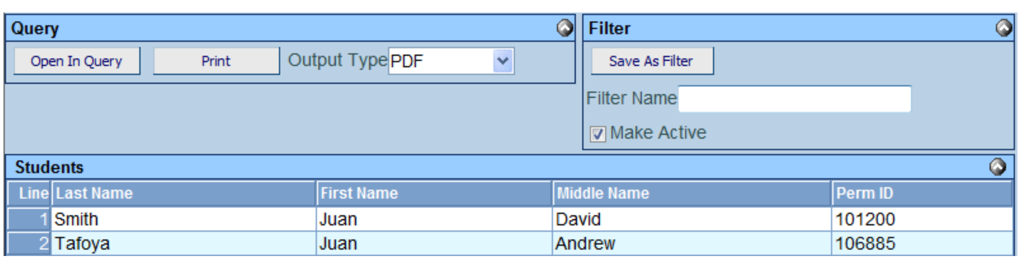


Figure 2-9 Find Results Screen

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

4. To display a specific page, click on the **page number**. To advance to the next page, click the **Scroll** button. To see additional page numbers, click on the __...__ link.

Figure 2-10 Additional Pages in the Find Results Grid

5. To display a student's record in the current screen, click on the student's name. The record will be highlighted in green and the information will show in the screen below the Find Result grid.

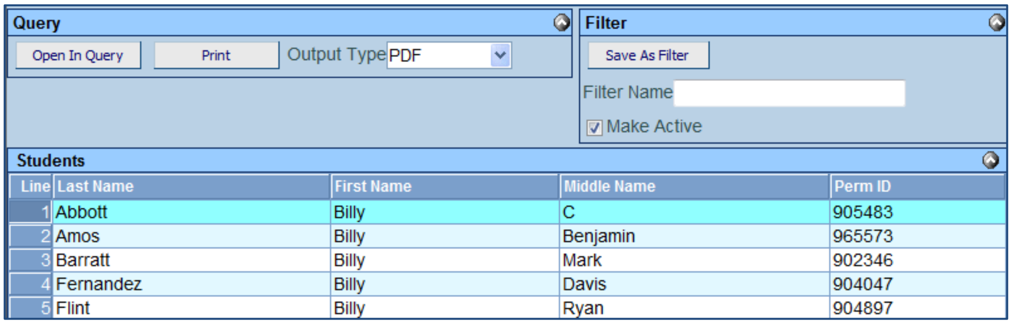


Figure 2-11 Selection of Result

6. To show a different student's record, click the new student's name.
7. Click the same student's name again and the Find Result screen closes.

To work with the Find Results grid by using an asterisk (*):

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

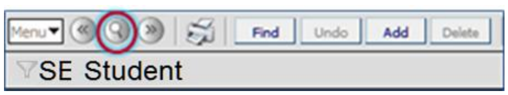


Figure 2-12 Find Mode Button

2. Enter all or part of any field or fields on any tab, and then enter an **asterisk (*)** either in a field by itself or with the text in a field. For example, enter the student's **Last Name** followed by an **asterisk (*)** to list all students whose last names start with the text entered in the Last Name field.

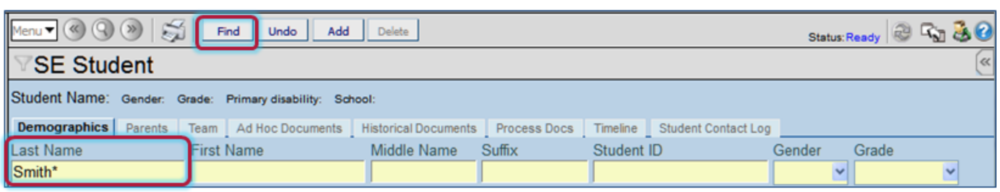


Figure 2-13 Finding by Asterisk

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

- If the asterisk (*) is placed *before* the text, the text must be matched exactly in the field.
- If the asterisk (*) is placed *after* the text, it matches any records that start with that text in the field.
- If the asterisk (*) is placed *before* and *after* the text, the text may be anywhere in the field.
- If the asterisk (*) is placed in the *middle* of the text, the field must start with the text before the asterisk and end with the text following the asterisk.
- If text is entered in the primary field, and no text is entered in any other field except asterisks, the Find Results grid will not pop-up. At least *one asterisk* must be placed in a field with text. Asterisks may be placed in other fields to have those fields included in the Find Results grid, also.

3. Click the **Find** button or press the **Enter** key to view the results. The Find Results screen opens in a separate window, listing all students that match the entered criteria.

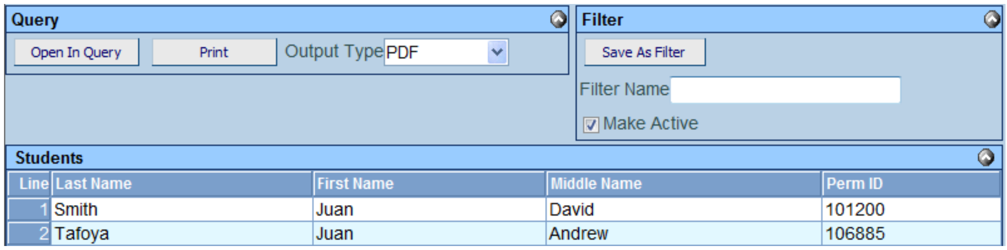


Figure 2-14 Find Results Screen

4. If more than one page of records match the criteria, the additional page numbers are displayed at the bottom of the Find Results screen. To display a specific page, click on the **page number**. To advance to the next page, click the **Scroll** button. To see additional page numbers, click on the **...** link.

Figure 2-15 Additional Pages in Find Results Grid

5. Click on the line of the student record desired. The record will be highlighted in green. Details display on the Student screen.

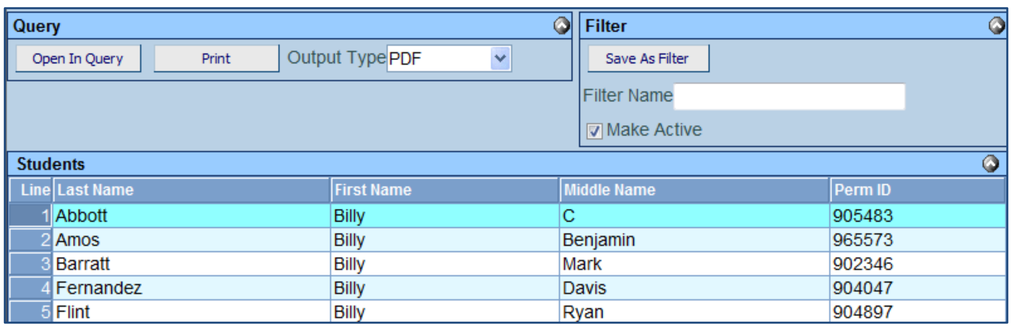


Figure 2-16 Selection of Search Results

6. To show a different student's record, click the new student's name.
7. Click the same student's name again and the Find Result screen closes. The information is displayed on the Student screen.

Note: At the top of the Find Result grid, there is the option to save the results of the find criteria as a query or filter. See *Synergy SE – Query & Reports Guide* for more information about using the Find Results grid to produce reports or filter the students displayed.

SORTING RECORDS

Throughout Synergy SE, there are sections of pages known as grids. These grids show multiple records in rows and columns, similar to a spreadsheet.

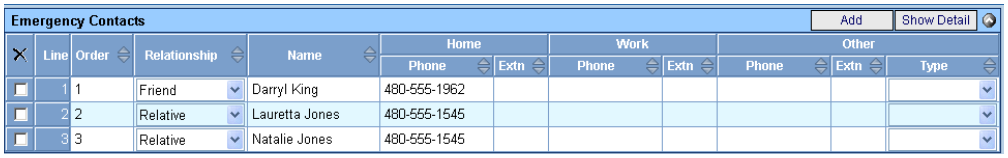


Figure 2-17 Emergency Contacts Grid

Each of these grids is sorted by the first column of information by default, usually in ascending order. However, the grids can be sorted by any of the columns in either ascending or descending order.

Figure 2-18 Ascending Order

1. Click on the top arrow in any column to sort a grid by in ascending order (smallest to largest, earliest to latest, A to Z).
2. Click on the bottom arrow in any column to sort a grid by in descending order (largest to smallest, latest to earliest, Z to A).

Figure 2-19 Descending Order

The current sort order is indicated by the selected triangle turning bright green.

Figure 2-20 Current Sort Order

Note: The customized sort order is not saved, and the grid does revert back to the default sort if another screen is brought into focus. The sort order does save when switching between tabs of the same screen.

Chapter Three:
SE Student and Portfolio Screens

In this chapter, the following topics are covered:

- SE Student screen versus the Portfolio screen
- The SE Student screen
- The Portfolio screen
- The Admin Student Portfolio screen
- The Admin Teacher Portfolio screen

SE STUDENT SCREEN VERSUS THE PORTFOLIO SCREEN

Synergy SE documents and special education student data can be accessed either from the *SE **Student screen** or the **Portfolio screen**.

The SE Student screen provides users such as school administrators and secretaries access to student data by displaying individual student records. These users do not necessarily belong to a student's team list so they will access students individually.

Special education teachers, therapists and other service providers who belong to the team list of several students will prefer to use the Portfolio screen, as they will be able to screen their caseload at a glance. **The user must be added to the student's team list in order for the student to appear on their Portfolio.** The links and buttons on the Portfolio screen will allow them to navigate to their student's documents as well as other special education screens.

**Your screen may read SE Student or just Student.*

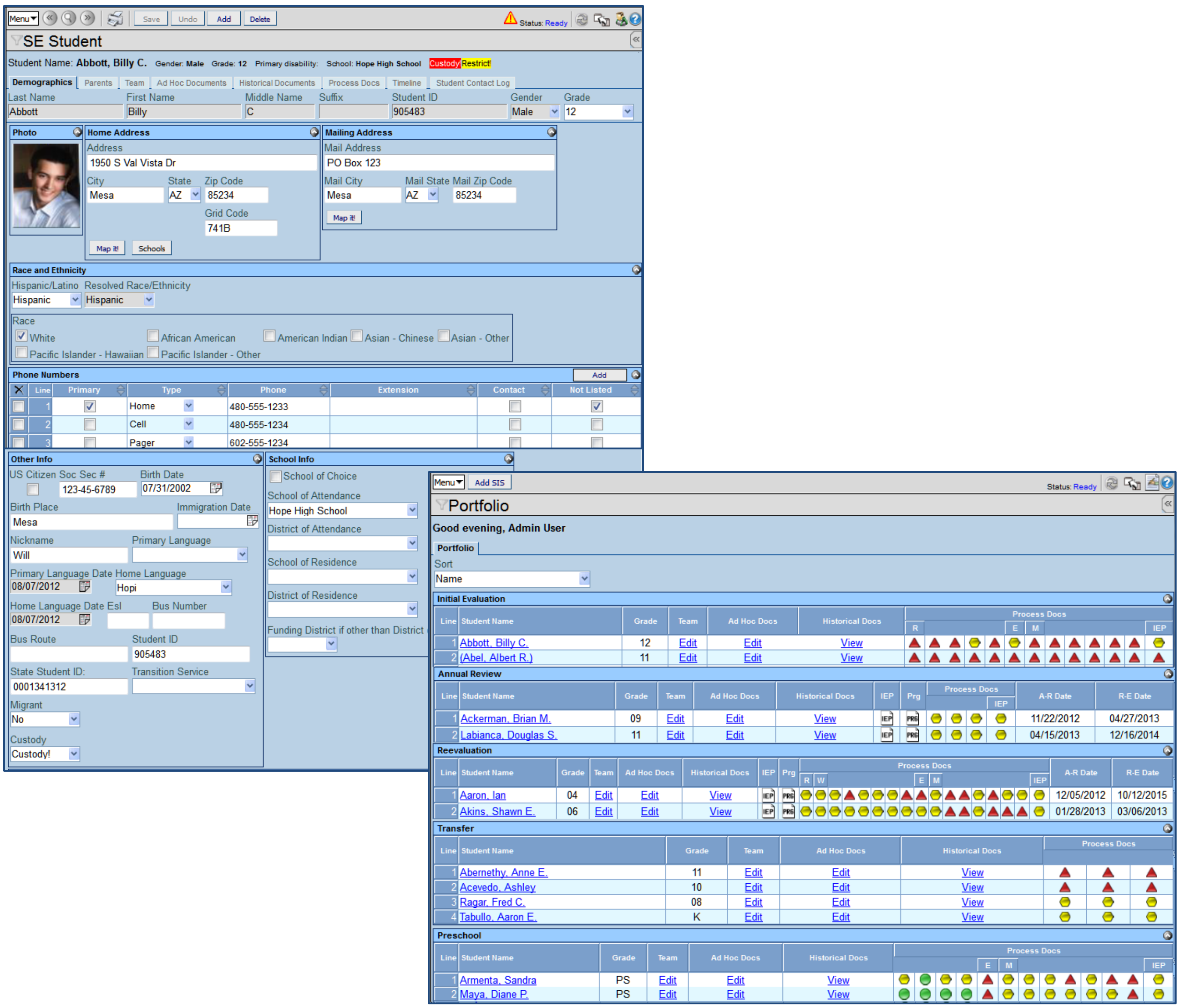


Figure 3-1 SE Student vs. Portfolio Screens

The SE Student Screen

Use the SE* Student screen to perform increased data sharing and collaboration between general and special education staff members.

- Find, view, add and edit student special education information
- Add and edit parent/guardian and emergency information
- View historical enrollment information and make corrections
- View details of the student's demographics for a given year and school
- View and record student contact

**Your screen may read SE Student or just Student.*

Access the SE Student Screen

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

Figure 3-2 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.

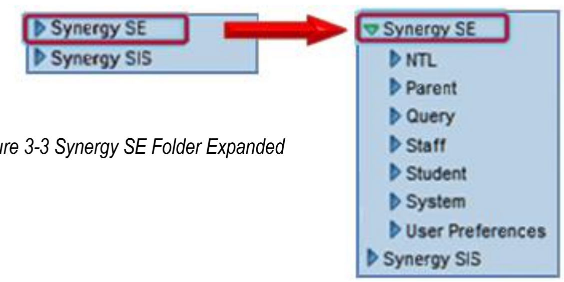


Figure 3-3 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the name **Student** or pointing right next to it.

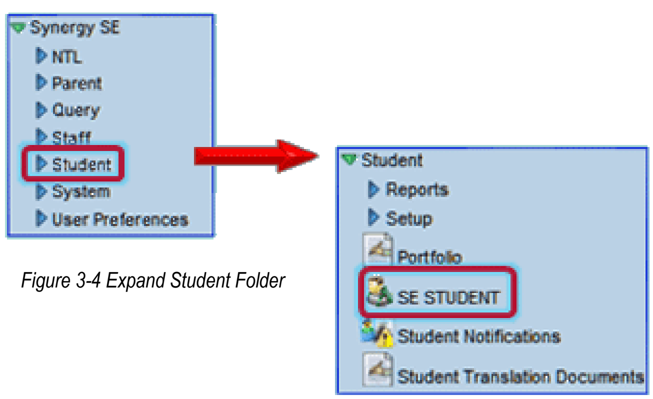


Figure 3-4 Expand Student Folder

4. Click on the **SE Student (or Student)** screen.

The SE Student screen has several tabs of information about a student. The tabs are:

- **Demographics**
  Contains the student demographics, contacts and attending school information
- **Parents**

Contains information about the student's parent/guardian

- **Team**

  Lists the special education team members for this student
- **Ad Hoc Documents**

  Contains miscellaneous special education documents
- **Historical Documents**

  Contains all documents that have been completed and finalized in Synergy SE. This area also allows users to attach various documents to be stored in the student's historical document file.
- **Process Documents**

  Contains the list of process documents necessary for the process the student is currently placed in as well as options to view current finalized documents and the ability to manually move student processes.
- **Timeline**

  Contains a visual display of event due dates for special education processes such as IEP and MET Due dates. Additional dates and timelines may be set up by the user's district.
- **Student Contact Log**

  Allows users to input contact and keep a log of contact they have had with student or parents.

Across the top of the screen, there are two lines of information that appear on every tab.

Figure 3-5 SE Student Screen Details

The first line contains the full **Student** Name, **Gender**, **Grade**, **Primary Disability** and **School**. If there is a situation regarding the custody of a student, **Custody!** appears in red in this line.

Other icons appear in the Action Bar if there are additional notifications about certain student conditions such as medical issues. These notifications are setup in the Student Notifications screen.

Figure 3-6 SE Student Screen Student Demographic Data

The second line which appears below the tabs is specific to the Student screen and, based on a user's security setup, can be edited in this screen. It is recommended that these fields remain view-only as any changes made to the Synergy SE Student Screen will automatically update the Synergy SIS Student Screen.

DEMOGRAPHICS TAB

The Demographics tab is divided into several Group Boxes. Based on a user's security setup, some group boxes or data fields may be hidden or made to be view only. All of the demographic data imports in from Synergy SIS (or a district's student information system database).

The information on the Demographics tab includes:

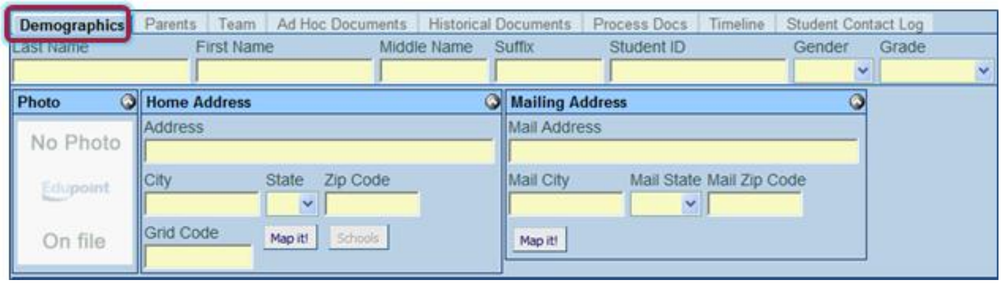


Figure 3-7 SE Student Screen Demographics Tab

- The student's **Home Address** and **Mailing Address** are listed.
- **The student's** Race **and** Ethnicity **are shown.**
- Phone Numbers **assigned to the student's Synergy SIS record are available.**

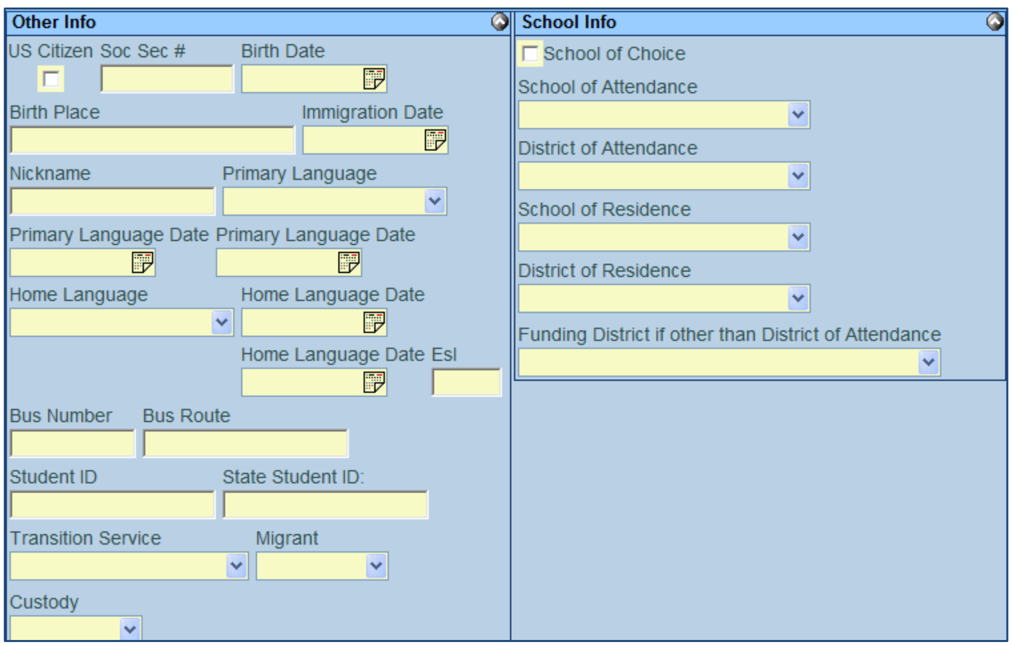


Figure 3-8 SE Student Screen Demographics Tab Part II

- The Other Info Group Box includes **Social Security** number and **Birth** information along with a field to enter a student's Nickname.
- The **Primary** and **Home Language** drop down fields as well as the **Primary Language Date** and **Home Language Date** fields will import into the special education documents.
- English as a Second Language (**ESL**) is listed along with **Bus** Route information.
- The student's unique district **Student ID** is shown along with the **State Student ID**.
- **Transition Service** drop down information is available for students
- **Migrant** and **Custody** flags are shown
- The School Info group box contains a **School of Choice** check box

- The **School of Attendance** drop down indicates the school the student attends. **This field will import into the special education documents.**
- The **District of Attendance** indicates the district the student attends.
- The **School of Residence** drop down shows the school assigned to the student based on their home address. **This field will import into the special education documents.**
- The **District of Residence** indicates the student's district based on the home address.
- If another district is funding the student's attendance it can be added to the **Funding District** drop down.

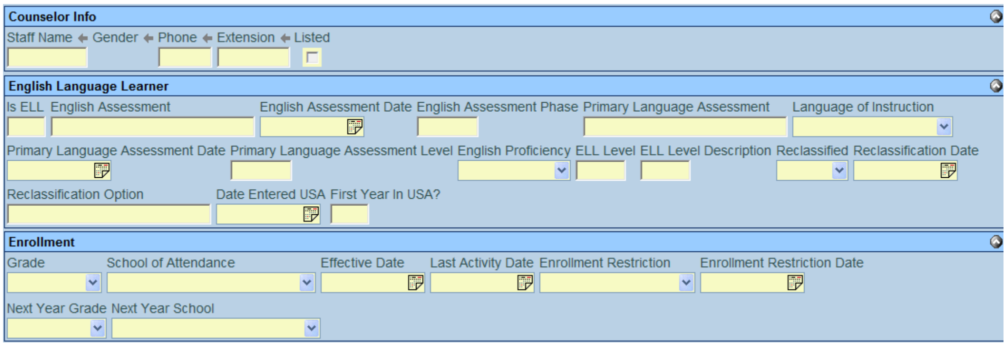


Figure 3-9 SE Student Screen Demographics Tab Part III

- If a student has an assigned counselor, the Counselor Info Group Box may be used. This box includes **Staff Name** (Counselor), **Gender** and **Phone number**.
- The English Language Learner Group Box may be used to view or enter ELL information. **Is ELL** specifies whether a student is an ELL student. The **English Assessment** scores and **Dates** are shown along with the **Primary Language Assessment** and **Language of Instruction**. **English Proficiency Level** is available as well as **Reclassification information**. There is also a **Date Entered USA** and a **First Year in USA?** field.
- The Enrollment Group Box indicates the students current **Grade** and **School of Attendance** along with the **Effective Date** and **Last Activity Date**. If the student has any **Enrollment Restriction** they will be displayed as well as **Enrollment Restriction Date. Next Year Grade** and **School** are also shown.

PARENTS TAB

The information on the Parents tab includes:

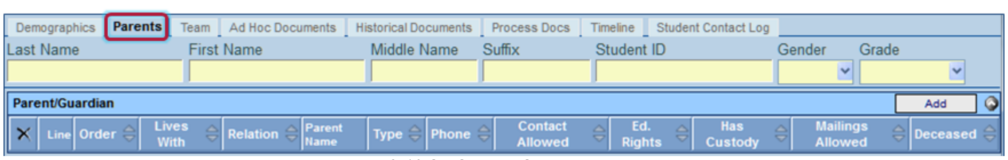


Figure 3-10 SE Student Screen Parents Tab

- The parent(s) with whom the student lives are indicated by checking the **Lives With** checkbox.
- The **Relation** to the student for each parent/guardian is shown.
- Clicking on the **Parent/Guardian** name brings up the Parent screen in a separate window with more information about the person.

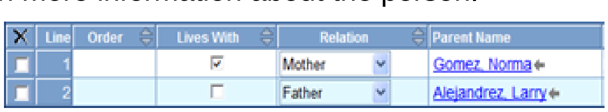


Figure 3-11 SE Student Screen Parents Tab Parent Screen Link

- The **Type** of primary phone to be used to contact the parent is shown with the number listed in the Phone column.
- If the parent is allowed contact with the student, the **Contact Allowed** box is checked. If the parent can make decisions about the student's education, the **Ed. Rights** box is checked. The **Has Custody** box is checked for the parent(s) with custody of the student, and the **Mailings Allowed** box is checked if school information can be mailed to the parent.

Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Deceased
Home	480-555-1234	☑	☑	☑	☑	☐

Figure 3-12 SE Student Screen Parents Tab Parent Contact Details

- The **Deceased** box is modified on the Demographics tab of the Parent screen in Synergy SIS.

TEAM TAB

The Team tab displays the student's special education team members. Users who belong to a student's team list will see that student displayed in their Portfolio screen. The team list also imports into several special education documents such as the MET Report and IEP.

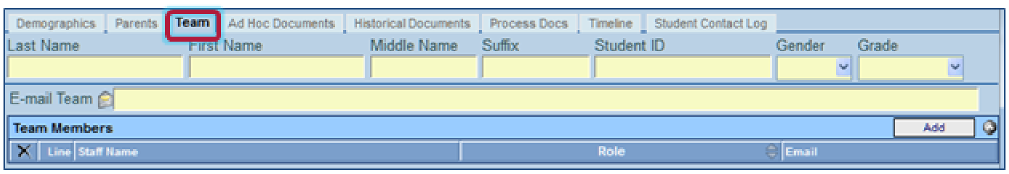


Figure 3-13 SE Student Screen Team Tab

AD HOC DOCUMENTS TAB

The **Ad Hoc Documents** tab contains miscellaneous special education documents which are not required process documents. These documents include editable as well as print only documents. They contain standard headers with the student demographic information. For information on creating and editing Ad Hoc Documents please see [Ad Hoc Documents.]()

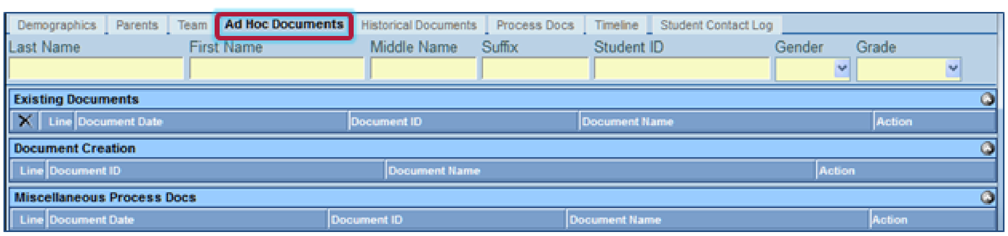


Figure 3-14 SE Student Screen Ad Hoc Documents

HISTORICAL DOCUMENTS TAB

The Historical Documents tab displays a list of Synergy SE **Historical Documents** that have been created and finalized. The Historical Documents screen is essentially a virtual file cabinet that stores the student's historical records. **Attached Documents** is a feature that allows a user to attach any miscellaneous document or file that is deemed necessary to store in the student's historical file.

The Historical Documents tab includes the following information:

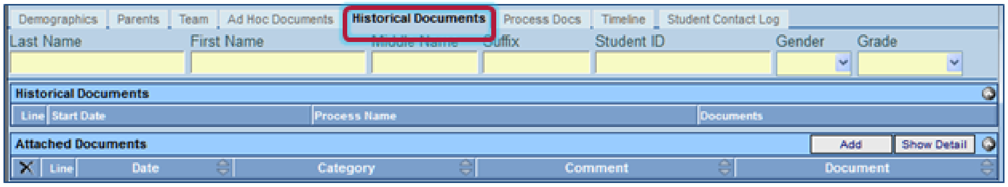


Figure 3-15 SE StudentScreen Historical Documents Tab

- **Document Date** (the Document Date of the document)
- **Process** (The process from which the document was finalized)
- **Document ID**
- **Document Name**
- **Action**

To access a student's Historical Document:

1. Click the **View** link in the Action column. The document will open in read-only (.pdf) format.

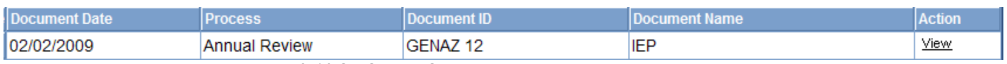


Figure 3-16 SE StudentScreen Historical Documents Tab View Link

2. Historical Documents can be deleted by clicking in the checkbox in the **X** column.

The Attached Documents section contains the following information:

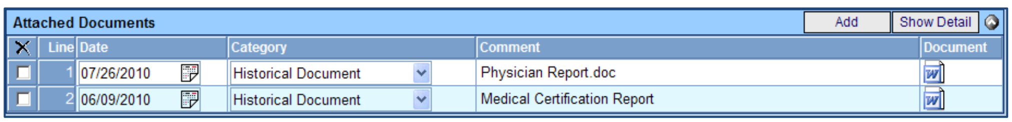


Figure 3-17 SE Student Screen Historical Documents Tab Attached Documents

- **Date** (Displays the date the document was attached but can be edited)
- **Category** (Select from **Category** drop-down list)
- **Comment** (Displays document name but can be edited)
- **Document** (Displays document type (i.e. doc, pdf)

To attach a document:

1. Click on the **Add** button. The Attach Document screen pops-up in a separate window.

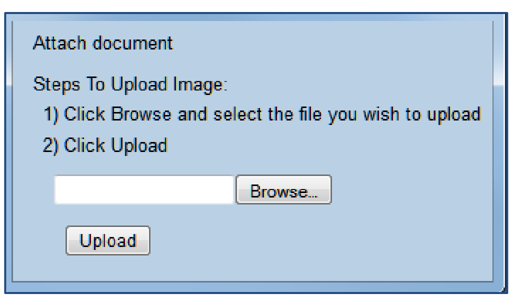


Figure 3-18 Attach Document Screen

2. Click the **Browse** button to select the file to attach.
3. Select the document and click the **Upload** button.
4. An **Upload Successful Message** will appear. Click **OK** to close. The document will appear in the **Attached Documents Grid**.

To edit details of the attachment:

1. **Highlight** the attached document row and click the **Show Detail** button or just double click on the row.

2. Click the **Category** drop-down list to select Category.
3. Change the name of the document in the **Comment** textbox if desired. **Added by user:** and **Date added** displays the date the attachment was added and the user who attached it.

Process Docs Tab

For information on creating and editing Process Documents please see Process Documents.

The information included on the Process Docs tab includes:

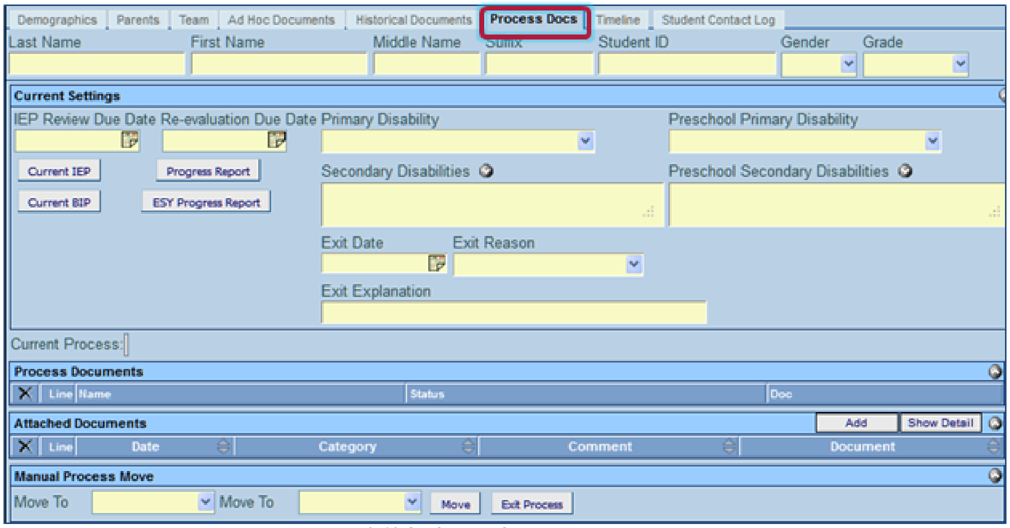


Figure 3-19 SE Student Screen Process Docs Tab

- The student's **NEXT IEP Review Due Date**. This date is generated or updated each time the IEP is finalized.
- The student's **NEXT Reevaluation Due Date**. This date is generated or updated each time the Multidisciplinary Evaluation Team Report (MET) is finalized.
- The student's **Primary Disability**. The disability is pulled from the Multidisciplinary Evaluation Team Report (MET).
- The student's **Secondary Disability**. The disability is pulled from the Multidisciplinary Evaluation Team Report (MET).
- The student's **Preschool Primary Disability** (if applicable).
- The student's **Exit Date** from special education (if applicable)
- The **Exit Reason** for terminating special education services (if applicable)
- The **Exit Explanation** (if applicable)
- **Current IEP** button that will open the student's current IEP for viewing. This is the IEP that has been finalized (locked).
- **Progress Report** button that will open the student's current progress report for updating.
- **Current BIP** button that will open the student's current BIP for viewing. This is the BIP that has been finalized (locked).
- **ESY Progress Report** button that will open the student's current ESY Progress report for updating.
- **Process Documents** specific to the process the student is currently in. The documents are represented by color coded icons that indicate the status. The documents are available for creating, viewing or editing, depending on user security.

- **Manual Process Move** option allows a student to be manually moved to another process, if the need arises.
- **Exit Process** for student to be exited from special education. All documents will be stored in Historical Documents in case the student is referred for services again.

TIMELINE TAB

The Timeline Tab displays upcoming process timelines such as the IEP and MET due dates. Each district has the ability to create and add additional timelines. The information included on the Timeline tab includes:

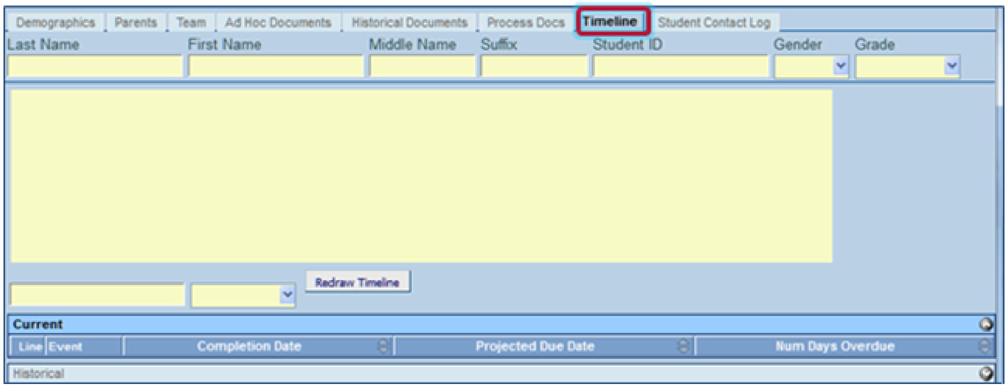


Figure 3-20 SE Student Screen Timline Tab

- **IEP Due Date and Triennial/Reevaluation Due Date**
- Current and Historical grids display **Event, Completion Date, Projected Due Date, Number of Days Overdue**

The information displayed in this Timeline graph example is:

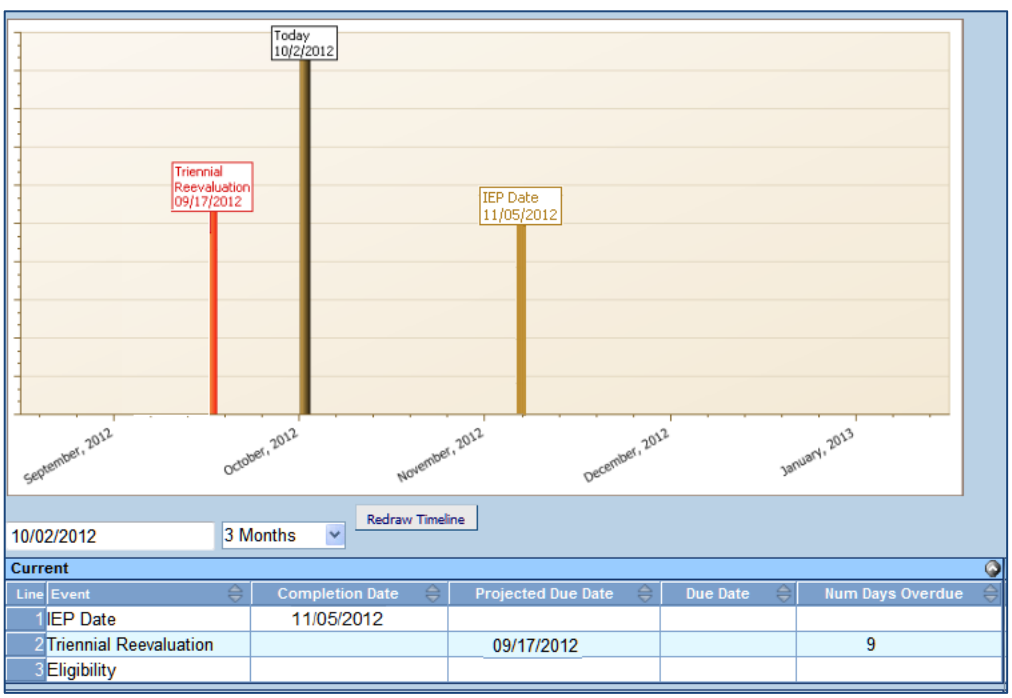


Figure 3-21 SE Student Screen Timeline Example

The information displayed in this Timeline graph example is:

- Today's date in brown
- Current timelines in tan
- Overdue timelines in red

To redraw the Timeline:

1. Redraw the timeline by clicking the drop-down and making a selection. The amount of time is drawn from today's date.
2. Click **Redraw Timeline**.

Student Contact Log Tab

The Student Contact Log documents contact made with parents. There is the General Ed Student Contact Log which imports from SIS and is view only. The Special Ed Student Contact Log allows Synergy SE users to add contact records.

The information included on the Student Contact Log tab includes:

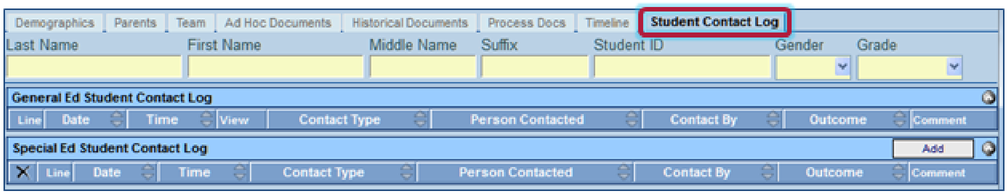


Figure 3-22 SE Student Screen Student Contact Log

General Ed Student Contact Log

- **Date**
- **Time**
- **View**
- **Contact Type**
- **Person Contacted**
- **Contact By**
- **Outcome**
- **Comment**

Special Ed Student Contact Log

- **Date**
- **Time**
- **Contact Type**
- **Person Contacted**
- **Contact By**
- **Outcome**
- **Comment**

Enter a contact record:

1. Click the **Add** button. A new row will be added to the grid.
2. Select the **Date** the contact was made MM/DD/YY format or click and select.
3. Type the **Time** the contact was made using 3:00PM or 3P format.
4. Select the **Contact Type** using the drop down statements available.

5. Enter the **Person Contacted** and the **Contacted By** fields.
6. Select the **Outcome** using the drop down statements available.
7. Add and **Comments** relating to the contact.
8. Click **Save** in the Action Bar.
9. To delete a Special Edn Student Contact Log entry, click the box in the **X** column and click the **Save** button at the top of the screen.

THE PORTFOLIO SCREEN

The Portfolio screen displays the caseload for a user which is the list of special education students to whose team they belong. Students are listed under their current special education process and their case file extends in the row to the right of their name.

ACCESS THE PORTFOLIO SCREEN

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

Figure 3-23 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.

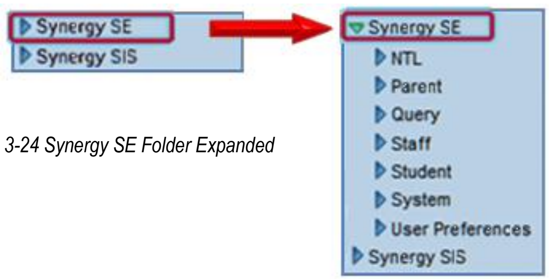


Figure 3-24 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the name **Student** or click pointing right next to it.

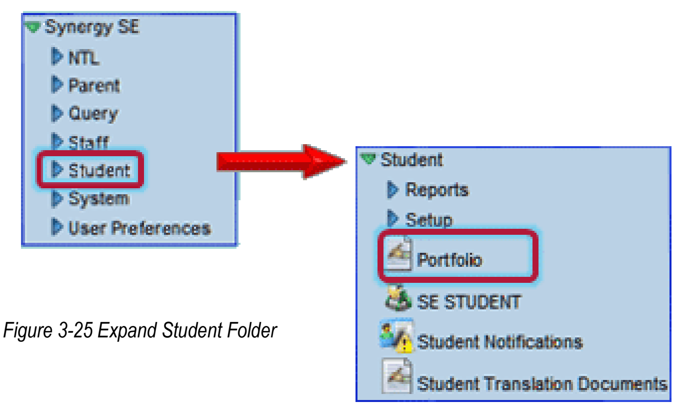


Figure 3-25 Expand Student Folder

4. Click on the **Portfolio** screen.

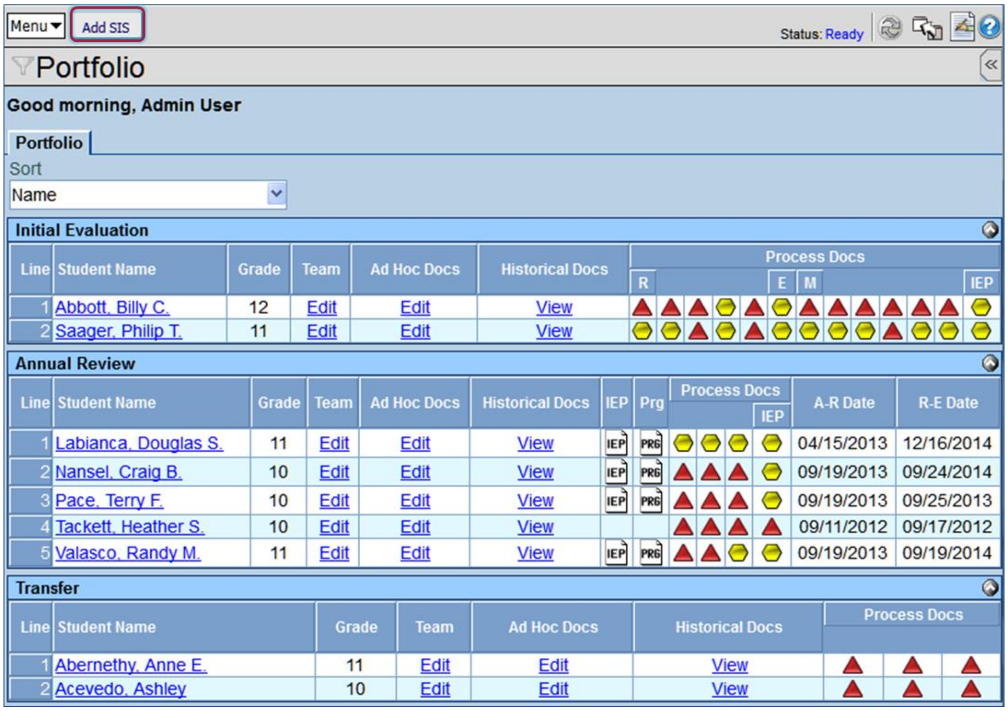


Figure 3-26 Portfolio Screen

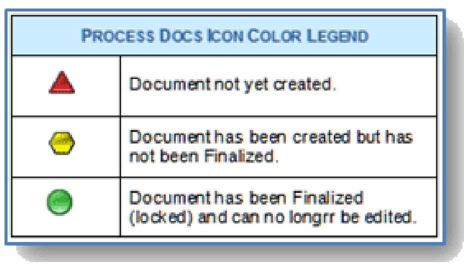
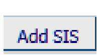


Figure 3-27 Process Docs Icon Color Legend

- Each student row contains links to information regarding that student. Process documents are represented by color-coded icons that are shaped differently to signify the status of the document.

> **Note:** The user must be added to the student's team list in order for the student to appear on their Portfolio.



- Add SIS button at the top of the screen opens the StudentSISFind screen in a new window. This screen imports students not currently in the special education process into the Synergy SE program from Synergy SIS (or the district's student information system database). See: Importing a Student from Synergy SIS.

> **Tip:** Remember! A user must belong to a student's team in order for that student to appear in the user's Portfolio screen. A user who has imported a student into Synergy SE will automatically be added to that student's team; otherwise the user will need to manually be added to the team list. Please see Managing the Student's Team List portion of this manual.

- The Portfolio screen displays six special education processes: Initial, Annual Review, Reevaluation, Transfer, Preschool, 504, and Gifted. Detailed information is provided on these processes in Chapter Four: Managing SE Documents and Chapter Seven: Process Overview.

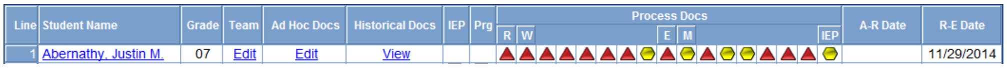


Figure 3-28 Student in Portfolio

Note: The Gifted and 504 Process may not available in all districts.

- Clicking on the Student Name brings up the Student screen in a separate window.
- The Edit link in the Team column opens the student's Team List in a separate window. The Team List displays the student's special education team members. Team members are added and removed using this screen.
- The Edit link in the Ad Hoc Docs column will open the list of Ad Hoc documents for viewing, editing or creating.
- The View link in the Historical Docs column will open the list of Historical documents for the student.
- If an IEP icon is available, the student has a current finalized IEP that can be viewed.
- If a PRG icon is available, the student has a current Progress Report that can be created, viewed or updated.
- The document icons have an indicator that appears when the user "hovers" over the icon with the mouse. The indicator displays the Document ID, name of document and status of document.

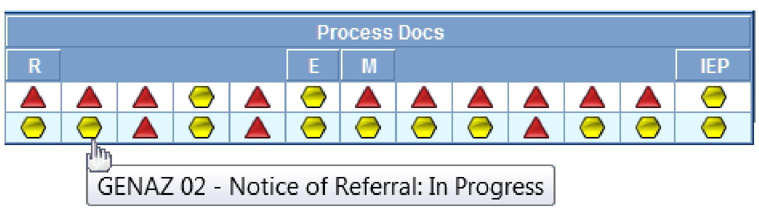


Figure 3-29 Portfolio Icon Color Legend

Filtering Students in the Portfolio

The list of students appearing on a user's Portfolio is pulled from the student's Team List. Users can filter the list of students to a specific school by changing the focus. For example, if a user has district wide access and belongs to the team list for many students, they can change their focus from district to a specific school. This will filter their case load to the student's at that school, only.

Specific processes can also be collapsed from view to give more screen room without having to scroll through the list of students.

The Expand/Collapse buttons are located at the top right of each process title bar.

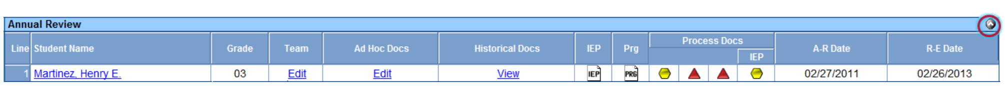


Figure 3-30 Portfolio Expand Collapse *buttons*

- Click on the Collapse button to hide the process from screen .

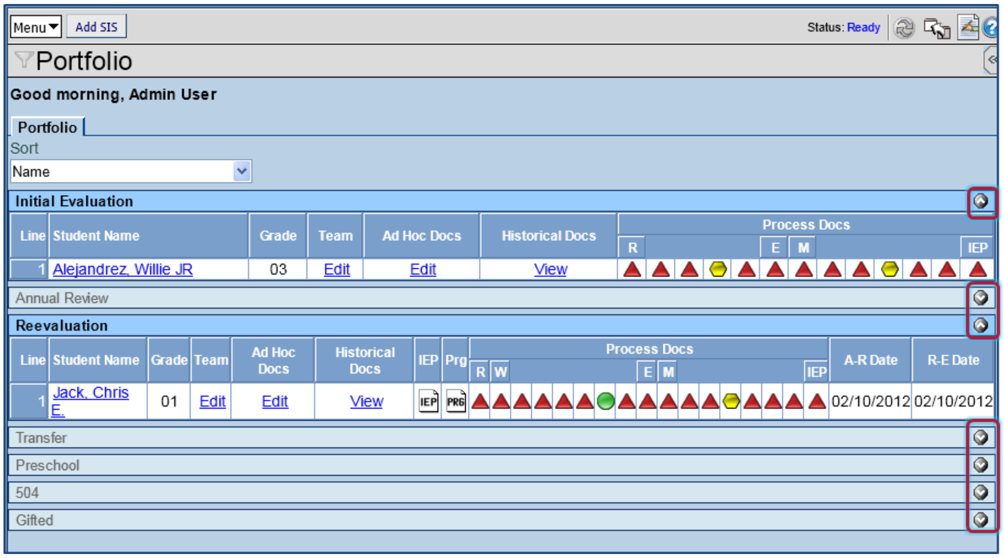


Figure 3-31 Portfolio Screen Processes Collapsed

- Click on the Expand button to bring the process back to the screen .

THE ADMIN STUDENT PORTFOLIO SCREEN

The Admin Student Portfolio screen displays all students in special education for the current focus. The user does not need to be a member of the team. The student's IEP and Progress Report (PRG) are available for viewing along with the next IEP and Eval dates. A red clock icon displays to indicate the IEP and Eval dates are overdue. This screen may be filtered by Staff, Roles, Primary Disability or Days to Next IEP and Eval. This screen is ideal for administrators or case managers to view and manage upcoming events without being added to all student teams.

ACCESS THE ADMIN STUDENT PORTFOLIO SCREEN

Figure 3-32 Synergy Navigation Tree

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

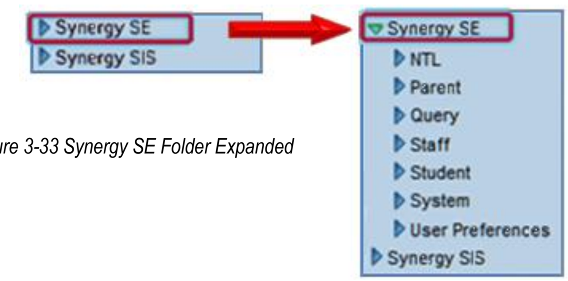


Figure 3-33 Synergy SE Folder Expanded

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.

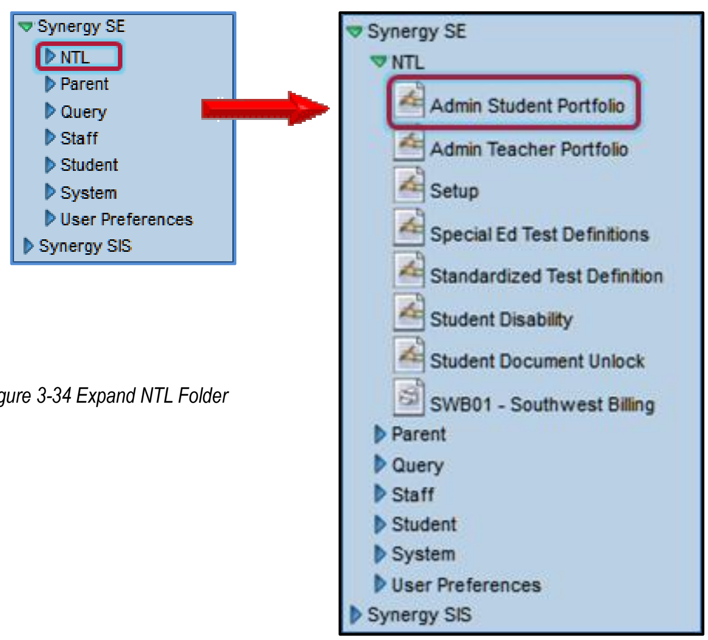
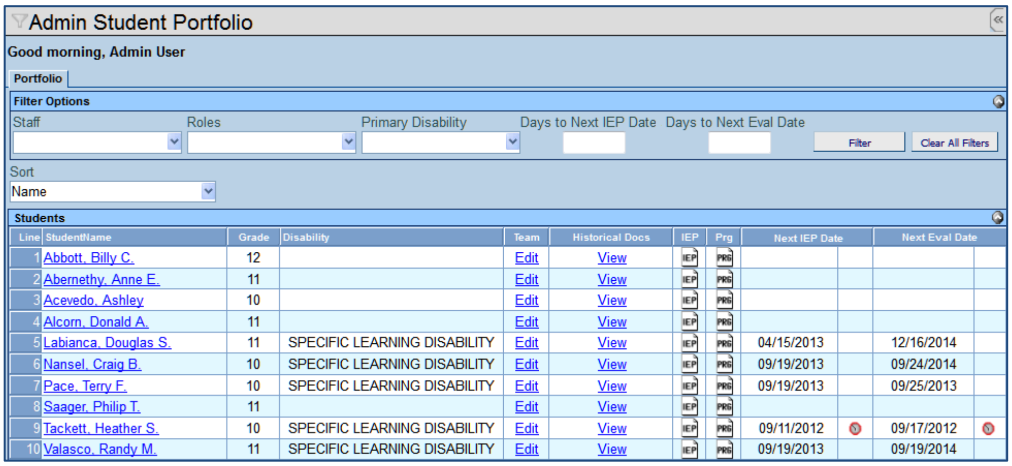


Figure 3-34 Expand NTL Folder

3. Under the Synergy SE folder, click on the initials **NTL** or pointing next to it**.**
4. Click on **Admin Student Portfolio.**

FILTER OPTIONS

1. To refine the results of the student names to display, select a **Staff** member from drop-down selection.
2. If that staff member has more than one role, select from the **Roles** drop-down to further filter the results.
3. OR
4. Select <u>only</u> from the **Roles** drop-down to filter for those staff members with a specific role.
5. Results may be filtered using the **Primary Disability** drop-down, as well.
6. Filters may be applied by entering the number of **Days to Next IEP Date** and/or **Days to Next Eval Date.** To reset the filters applied, click Clear All Filters.
7. Click Filter. The results are returned and student names display.



Line	StudentName	Grade	Disability	Team	Historical Docs	IEP	Prg	Next IEP Date	Next Eval Date
1	Abbott, Billy C.	12		Edit	View	IEP	PRG		
2	Abernethy, Anne E.	11		Edit	View	IEP	PRG		
3	Acevedo, Ashley	10		Edit	View	IEP	PRG		
4	Alcorn, Donald A.	11		Edit	View	IEP	PRG		
5	Labianca, Douglas S.	11	SPECIFIC LEARNING DISABILITY	Edit	View	IEP	PRG	04/15/2013	12/16/2014
6	Nansel, Craig B.	10	SPECIFIC LEARNING DISABILITY	Edit	View	IEP	PRG	09/19/2013	09/24/2014
7	Pace, Terry F.	10	SPECIFIC LEARNING DISABILITY	Edit	View	IEP	PRG	09/19/2013	09/25/2013
8	Saager, Philip T.	11		Edit	View	IEP	PRG		
9	Tackett, Heather S.	10	SPECIFIC LEARNING DISABILITY	Edit	View	IEP	PRG	09/11/2012	09/17/2012
10	Valasco, Randy M.	11	SPECIFIC LEARNING DISABILITY	Edit	View	IEP	PRG	09/19/2013	09/19/2014

Figure 3-35 Admin Student Portifolio Screen

1. Click on a **Student Name** to open the SE Student screen.
2. Click **Edit** in the Team column to open the SE Student screen, Team tab. Changes to the student's team may be made from this screen.
3. Click **View** in the Historical Docs column to view the SE Student screen, Historical Documents tab that is associated with the selected student.
4. Click IEP or PRG to view the finalized PDF versions of the student's IEP or Progress Report.
5. The **Next IEP Date** and **Next Eval Date** will have a red clock next to the date if the IEP and Eval are overdue. This could mean that the documents were not finalized by the due date or that the process has not yet been started and needs to be completed.
6. To run additional searches and reset the filters applied, click Clear All Filters.

THE ADMIN TEACHER PORTFOLIO SCREEN

The Admin Teacher Portfolio screen displays Synergy SE users for the current focus, including Staff name, Role, and Student Count. The user does not need to be a member of a special education team to use this screen. The Admin Teacher Portfolio screen displays the staff member's next IEP Review and Eval dates if they have an upcoming IEP or Evaluation. A red clock appears next to the dates if the IEP or Evaluation is overdue. The staff name is a link to that person's Portfolio screen. Once the Portfolio screen is open, Process Documents may be edited or finalized as needed.

ACCESS ADMIN TEACHER PORTFOLIO SCREEN

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

Figure 3-36 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.

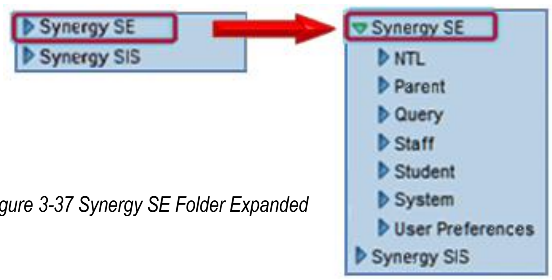


Figure 3-37 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the initials **NTL** or pointing next to it**.**

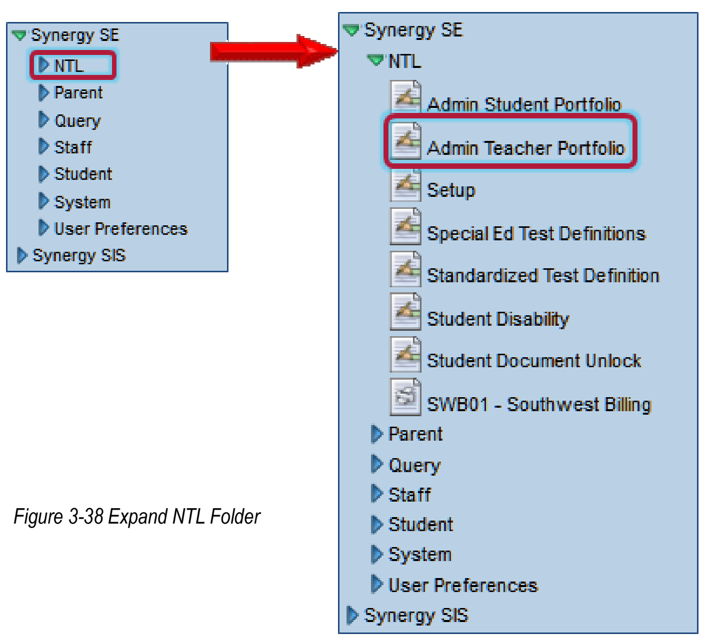


Figure 3-38 Expand NTL Folder

4. Click on **Admin Teacher Portfolio**.

SELECTION CRITERIA

When looking for Portfolio records, one or many of the search criteria may be used. In some instances, it may be helpful to use more than one piece of information to search. For example, there may be several staff members with a last name of Smith. To search using multiple fields:

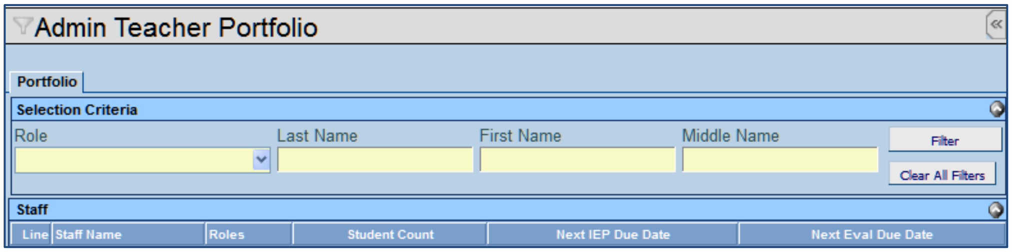


Figure 3-39 Admin Teacher Portfolio Screen

1. Enter partial or complete data in any field on the screen.
2. Click Filter. Results displays a list of records matching criteria entered.
3. To reset the filters applied, click Clear All Filters.

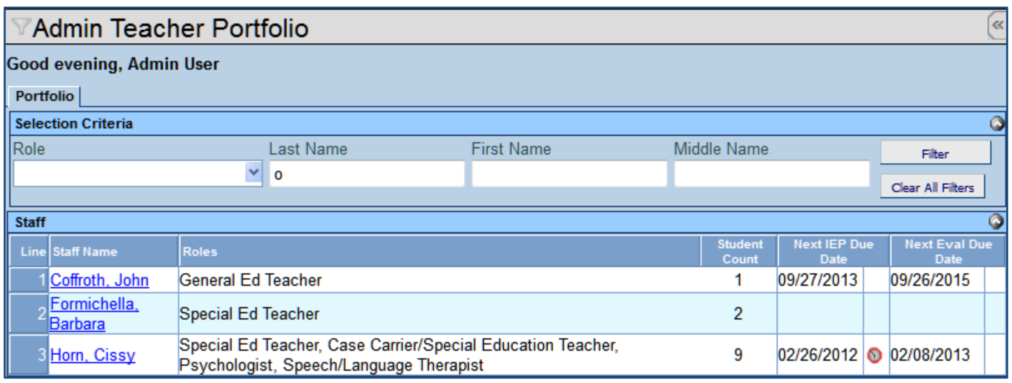


Figure 3-40 Admin Teacher Portfolio Screen Selection Criteria Filtered

1. Click on a **Staff Name** to open that staff member's Porfolio screen.
2. The **Next IEP Date** and **Next Eval Date** will have a red clock next to the date if the IEP and Eval are overdue. This could mean that the documents were not finalized by the due date or that the process has not yet been started and needs to be completed.

Chapter Four: MANAGING SE DOCUMENTS

In this chapter, the following topics are covered:

- Understanding SE Document properties
- Editing SE Documents
- Printing, validating and finalizing SE Documents

UNDERSTANDING SE DOCUMENT PROPERTIES

SE Document properties differ in their ability to be edited and saved. This is intentional for several reasons. By law, certain documents may not be changed once the multidisciplinary education team has agreed on the contents. They may be amended and duplicated but the original document needs to stay intact.

However, unintentional errors can occur when composing documents. Synergy SE helps to ensure accuracy by validating and finalizing documents. Validating a document means the document is being checked for errors. If errors are found, the document may be edited again and then validated again. This process can be done over and over. If the document is validated and no errors are found, it may be finalized or it may be saved for further edits. Once a document is finalized, it is complete and no longer an editable document.

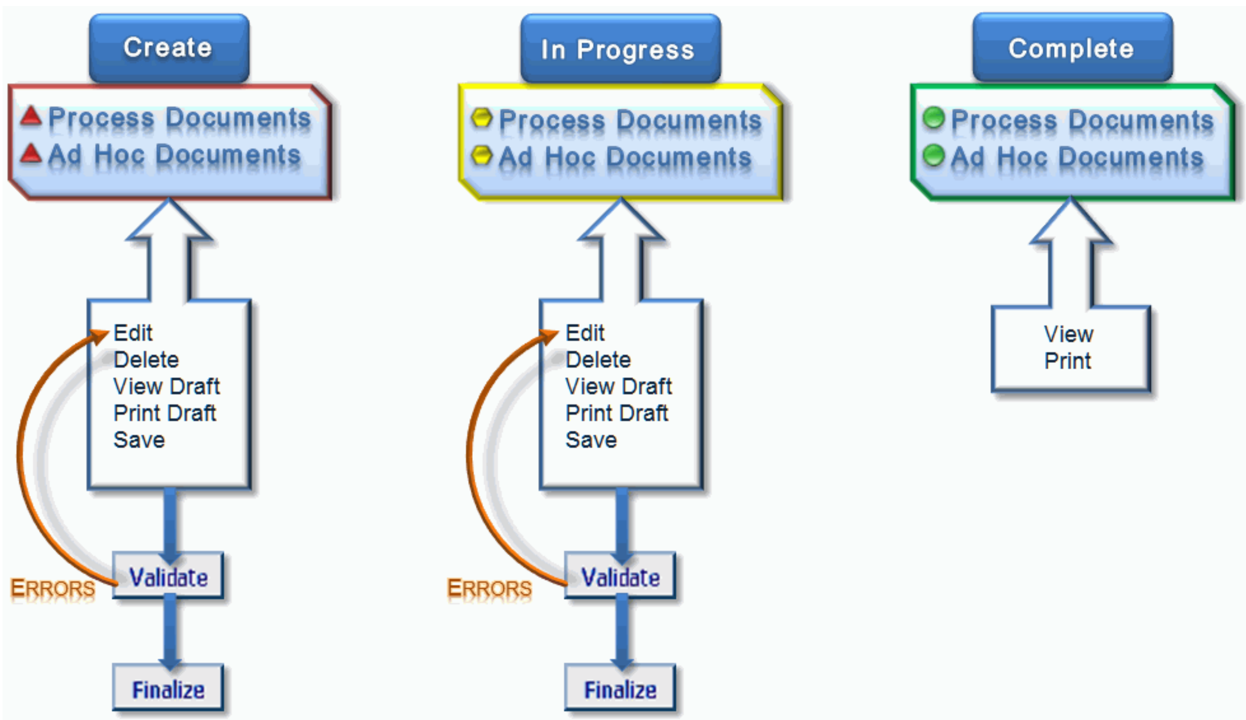


Figure 4-1 SE Document Properties

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

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

EDITING SE DOCUMENTS

MULTIPLE USERS IN A DOCUMENT

Two or more users can work in the same document concurrently while saving their data; however, those users will not be able to edit the same field at the same time.

For example, if both users are in the Referral document and editing the **Reason for Referral textbox,** the first user who clicks **Save** will have their data saved.

The second user will receive the following warning message upon clicking the **Save** button:

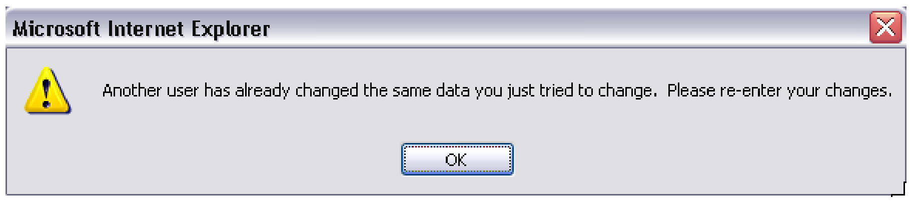


Figure 4-2 Multiple Users Message

Note: This warning message is defined locally and may be worded differently by your system administrators.

The second user will need to copy their data to another location (i.e. Word, Notepad) momentarily, and **Refresh** the screen (click) to allow the other user's entry to appear. Then the user can copy and paste their original data to that field and click the **Save** button.

DELETING A DOCUMENT

An existing document can be removed by using the Delete feature. Access to the Delete button is governed by the security rights and may not be available to all users.

Figure 4-3 Delete Button

To delete a document:

1. Click the **Delete** button located at the top of the document. If the Delete button is grayed out (not clickable), click the **Save** or **Undo** button. A message will display confirming the deletion of the document.

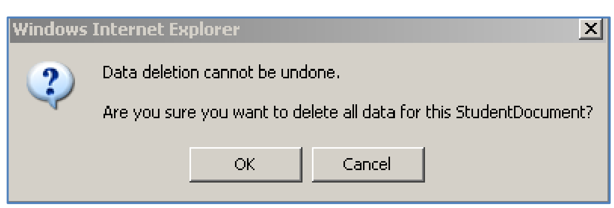


Figure 4-4 Data Deletion Warning

2. To continue with the deletion, click **OK**. To cancel the deletion, click **Cancel**. The document will close and the system will return to the previous screen.

Printing a Document

Printable versions of documents are available at any time during the document editing process. A document does not need to be validated or finalized prior to viewing or printing the document.

Note: In order to generate printable Synergy SE documents, Adobe Acrobat Reader must be installed on the user's computer.

To obtain a printable version of a document:

1. Click the **Print Preview** button in the Action bar of the document. If the Print Preview button is grayed out (not clickable), click the **Save** or **Undo** button.

Figure 4-5 Print Preview Button

A message displays informing the user to wait. The printable document opens in Acrobat Reader.

Figure 4-6 Print Progress Status

Validating a Document

Before a document can be finalized, validation must occur. This process compares data entered in the document against rules established by the district to find omissions, data conflicts or invalid selections. If errors are found, a window opens that contains a list of the errors.

To validate a document:

1. Click the **Validate** button in the Action Bar of the document. If the Validate button is grayed out (un-clickable) click **Save** or **Undo**.

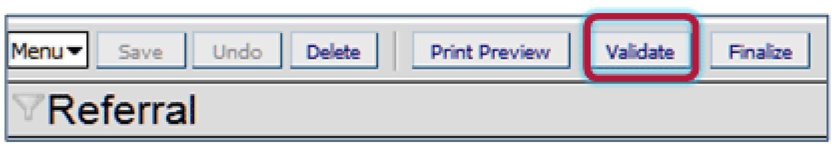
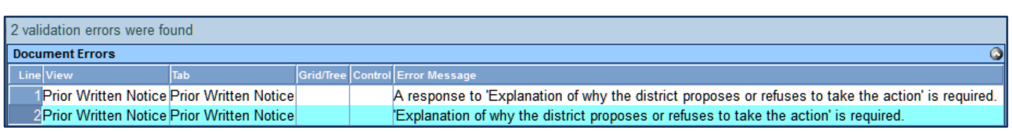


Figure 4-7 Validate Button

If validation errors exist, the Revelation Document Errors screen displays, detailing the errors.


2 validation errors were found

Document Errors

Line	View	Tab	Grid/Tree	Control	Error Message
1	Prior Written Notice	Prior Written Notice			A response to 'Explanation of why the district proposes or refuses to take the action' is required.
2	Prior Written Notice	Prior Written Notice			'Explanation of why the district proposes or refuses to take the action' is required.

Figure 4-8 Revelation Document Errors Screen

2. Click anywhere on the line of the **Document Error**. The line highlights green. The document displays with the specific validation error highlighted in pink.

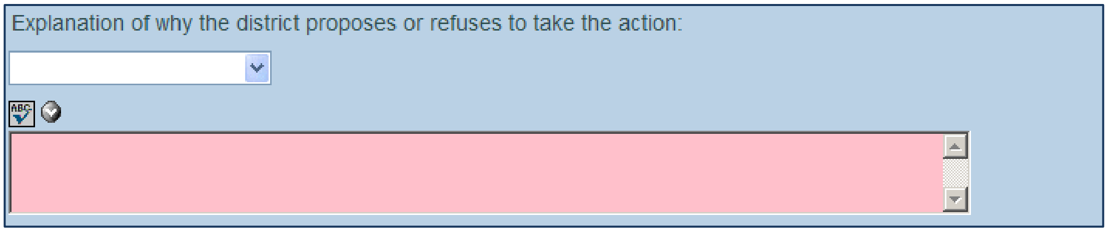


Figure 4-9 Document Error

3. Make the correction in the highlighted field and click the **Save** button.
4. Proceed to the next validation error on the list by clicking anywhere in the row of that error.
5. Follow step 3 and 4 until all validation errors have been addressed.
6. **Close** the Validation Document Errors window.

Figure 4-10 Close Window

7. If desired, click on the **Validation** button again to re-check the validation status A message box displays stating that no validation errors were found.

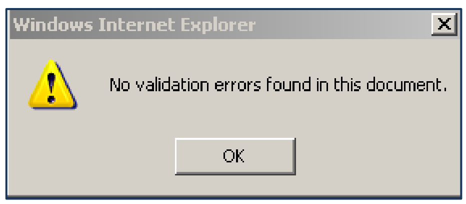


Figure 4-11 No Validation Errors Found

Finalizing a Document

Caution: Finalizing a document prepares *most* documents for moving to the historical document file, after the process move. However, there are documents, that when finalized, begin the process move procedure OR exit the student from special education**.** These documents include the IEP as well as certain Prior Written Notices.
The IEP is the main "trigger" document that moves all created documents including the IEP itself, to Historical Documents. See the *Synergy SE*© *Documents Guide* for detailed information.

When a document is complete and has been validated, it will need to be finalized. This action will prepare the document to move to the student's historical document file when the process change occurs.

Once a document is finalized, it will no longer be editable. The document will open as a read-only PDF document (Acrobat Reader is required). The icon representing the document will turn from yellow to green.

To finalize a document:

Note: The validation process runs automatically when a document is finalized. If the document is found to have validation errors, the user must follow the steps required in the document validation process. Once the validation errors are corrected the document will finalize properly.

1. Click the **Finalize** button in the Action Bar of the document. If the Finalize button is grayed out (un-clickable) click **Save** or **Undo**.

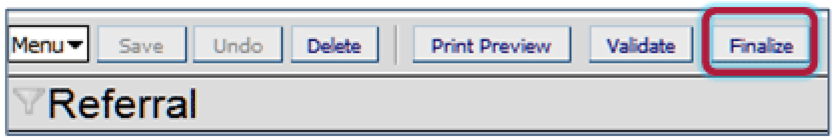


Figure 4-12 Finalize Button

A printable (but no longer editable) document displays. The finalized document displays a green icon. When clicked, the document opens as read-only.

Creating Multiple Documents

Documents such as Meeting Requests and Parent Permission can have additional versions created after the original document has been finalized. For example, if a Meeting Request was created and sent to the parent but later the meeting had to be cancelled due to a no show or some other reason, a new meeting request can be created. The original request document will be saved along with the new request document. This will provide a history of the meetings that were attempted to be set up.

Note: Each School District has the ability to apply the "Allow Multiple" feature to other Synergy SE documents. Check with your district's system administrator for a full list of these documents.

This example will show how to create multiple IEP Meeting Request documents using the IEP Meeting Request. The original meeting request has been created but the meeting was cancelled due to the parent not showing up.

Figure 4-13 Finalize Button

1. If the original meeting request has not been finalized, do so now.The meeting request icon displays green, indicating that it has been finalized.

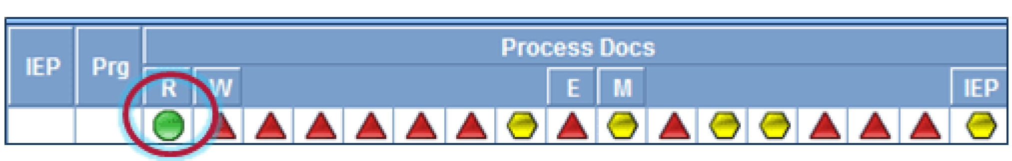


Figure 4-14 Finalized Document Icon

2. Click on the **green icon** to access the new meeting request template.The **DocumentViewList** screen opens.

The DocumentViewList screen contains a Create button as well as a list of previously finalized Meeting Requests. This list provides information on the original Meeting Request documents including when the document was created and finalized as well as who created and finalized the document. The PDF icon is the link to view the finalized original document.

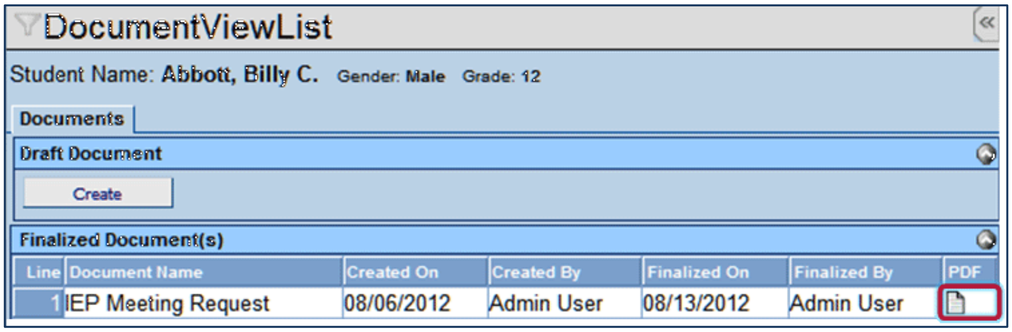


Figure 4-15 Meeting Request Document View List

3. Click the **Create** button. A new Meeting Request template displays. This document will represent the new meeting that has been rescheduled. Once this document is finalized, it displays in the finalized Document list along with the original document.

All multiple documents will move along with the process documents to the student's Historical Documents during the normal process move procedure.

Ad Hoc Documents

Synergy SE Ad Hoc documents are special education documents created for a specific purpose. They are not necessarily used in every special education student's documentation. An example of an Ad Hoc document might be a More Restrictive Placement document or a Notice of Refusal of Evaluation document. Ad Hoc documents contain editable as well as print only documents.

> **Note:** For the purpose of illustration the following screen shots contain an abbreviated list of available Ad Hoc documents. For a list of Ad Hoc and Process documents see *Synergy SE© Documents Guide*. These lists may not be complete, as your district may have additional or similar documents added.

The Ad Hoc Documents tab contains the student's demographic information in the top section.

- **Existing Documents**

  This section includes all Ad Hoc documents that have been created for the student, including Print Only documents.

- **Document Creation**

  This section includes the list of all Ad Hoc documents available for creation. (Please see note above for list.)

- **Create**

  This link will create a new Ad Hoc Document and make it available to edit.

- **Edit**

  This link will open a previously created document and make it available to edit.

- **View**

  This link will open a *finalized* Ad Hoc document. These documents are printable but read-only.

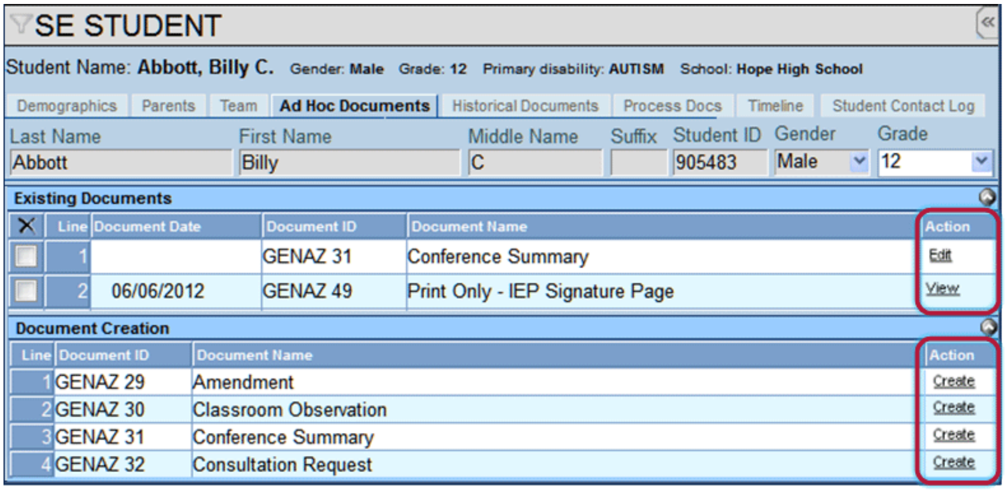


Figure 4-16 Student SE Screen Ad Hoc Documents Tab

The following example demonstrates how to create an Ad Hoc document using the Consultation Request (GENAZ 32); however other documents could be used (excluding Print Only).

1. Locate **GENAZ 32 Consultation Request** in the Document Creation grid.
2. Click on the **Create** link in the Action column for this document. A new Consultation Request Document opens.

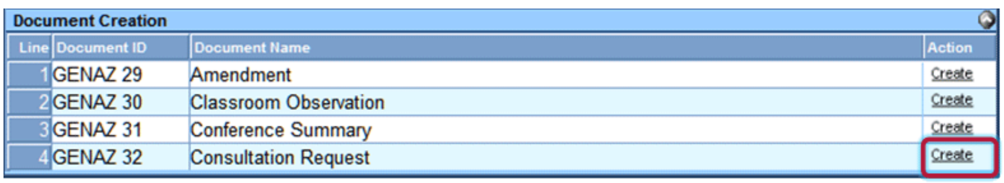


Figure 4-17 Student SE Screen Ad Hoc Documents Tab Document Creation

3. Edit and enter data as appropriate.

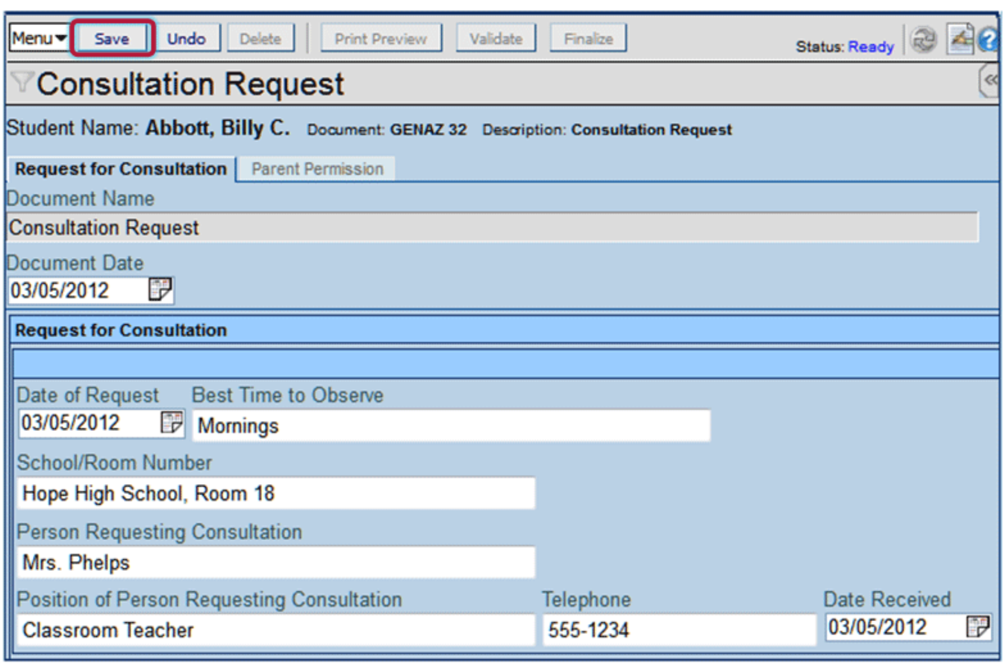


Figure 4-18 Consultation Request Screen Save Button

4. Click the **Save** button to save changes and **Close** the document.

The Ad Hoc Document window displays the Consultation Request document in the Existing

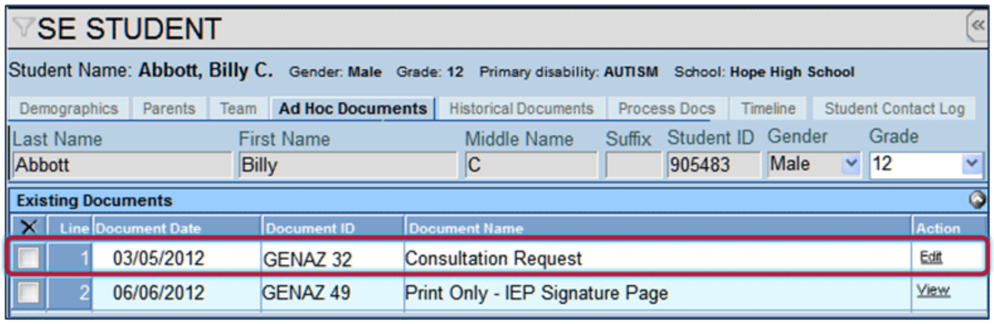


Figure 4-19 Student SE Screen Ad Hoc Documents Tab Existing Documents

Documents section of the screen.

At this point, the Consultation Request document is available for updates as additional data becomes available or the document can be finalized. Once the document is finalized, the Action column link will change from Edit to View. The document displays in read-only mode (PDF).

CREATING MULTIPLE AD HOC DOCUMENTS

The following example demonstrates how to create multiple Ad Hoc documents using the Consultation Request (GENAZ 32); however other documents could be used (excluding Print Only).

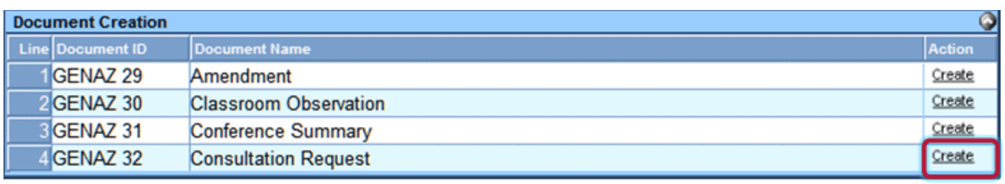


Figure 4-20 Student SE Screen Ad Hoc Documents Tab Create Link

1. Locate **GENAZ 32 Consultation Request** in the Document Creation grid.
2. Click on the **Create** link in the Action column for this document. A new Consultation Request Document opens.
3. Edit and enter data as appropriate.
4. Click the **Save** button to save changes and **Close** the document.

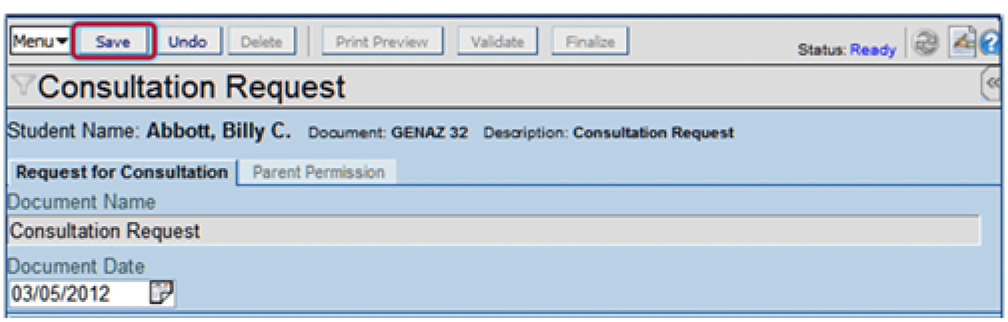


Figure 4-21 Create Multiple As Hoc Documents Save Button

The new Consultation Request document displays in the Existing Documents section.

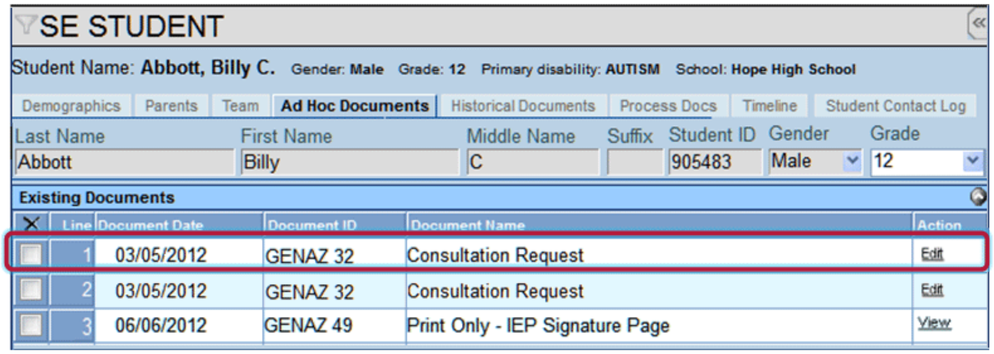


Figure 4-22 Student SE Screen Ad Hoc Documents Tab Multiple Ad Hoc Documents

At this point, the second Consultation Request document is available for updates as additional data becomes available or the document can be finalized, just like the first. Once the document is finalized, the Action column link will change from Edit to View. The document displays in read-only mode (PDF).

Note: Based on decisions made the school district system administrator, certain Ad Hoc documents may not be available for duplication. The following message displays after clicking Create:

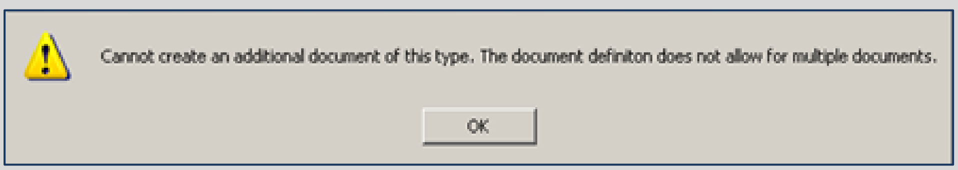


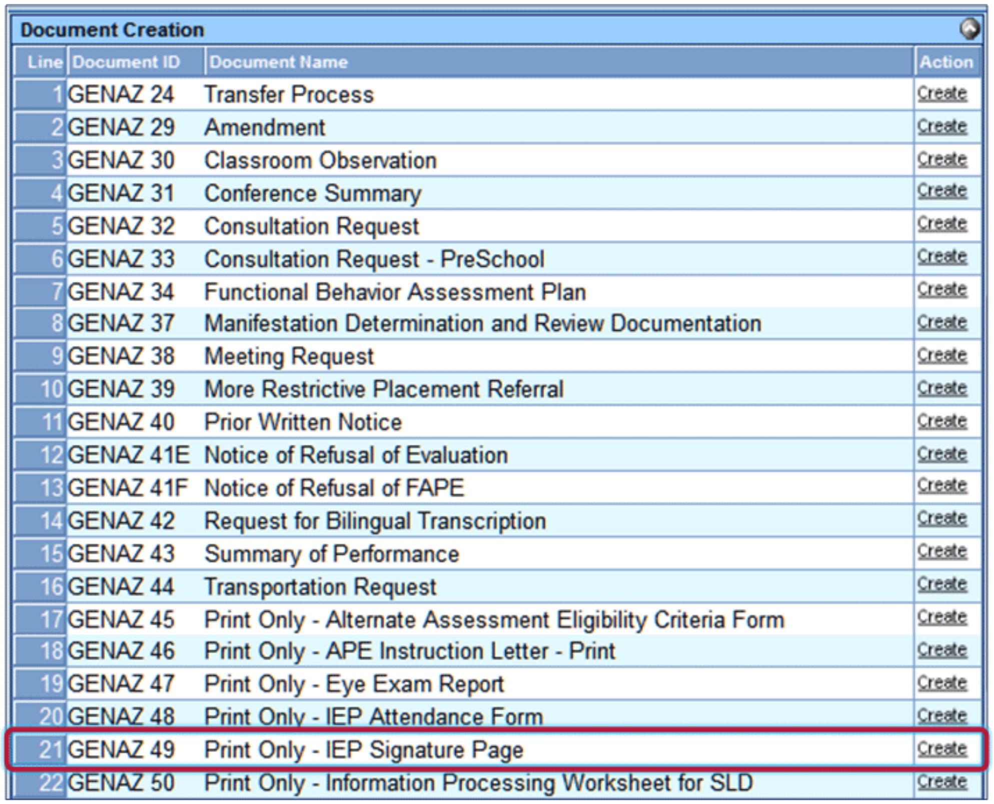
Figure 4-23 Cannot Create Multiple Docs Message

This message indicates that the system has been set to not allow multiple types of the requested document.

PRINT ONLY AD HOC DOCUMENTS

Print-only Ad Hoc documents open as read-only (PDF) documents. They are not editable; however they include the individual demographic data of each student. The date that appears on the document is the date when the print-only document was initially created or opened. Print-only documents are labeled Print Only in the Document Name column.

View Print-Only Ad Hoc Document:



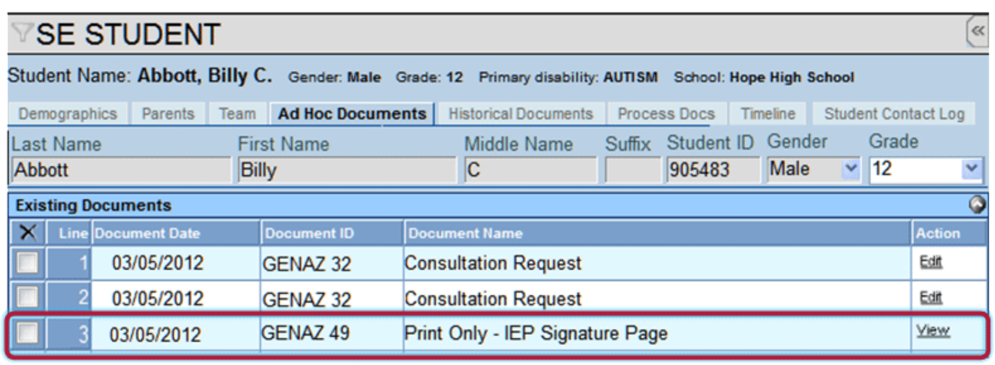
Document Creation

Line	Document ID	Document Name	Action
1	GENAZ 24	Transfer Process	Create
2	GENAZ 29	Amendment	Create
3	GENAZ 30	Classroom Observation	Create
4	GENAZ 31	Conference Summary	Create
5	GENAZ 32	Consultation Request	Create
6	GENAZ 33	Consultation Request - PreSchool	Create
7	GENAZ 34	Functional Behavior Assessment Plan	Create
8	GENAZ 37	Manifestation Determination and Review Documentation	Create
9	GENAZ 38	Meeting Request	Create
10	GENAZ 39	More Restrictive Placement Referral	Create
11	GENAZ 40	Prior Written Notice	Create
12	GENAZ 41E	Notice of Refusal of Evaluation	Create
13	GENAZ 41F	Notice of Refusal of FAPE	Create
14	GENAZ 42	Request for Bilingual Transcription	Create
15	GENAZ 43	Summary of Performance	Create
16	GENAZ 44	Transportation Request	Create
17	GENAZ 45	Print Only - Alternate Assessment Eligibility Criteria Form	Create
18	GENAZ 46	Print Only - APE Instruction Letter - Print	Create
19	GENAZ 47	Print Only - Eye Exam Report	Create
20	GENAZ 48	Print Only - IEP Attendance Form	Create
21	GENAZ 49	Print Only - IEP Signature Page	Create
22	GENAZ 50	Print Only - Information Processing Worksheet for SLD	Create

Figure 4-24 Create Print Only Document

- In the Document Creation section, click the **Create** link in the Action column. The document displays in read-only (PDF) which is printable.

The Print Only Document displays in the Existing Document section with **View** as the Action link.



X	Line	Document Date	Document ID	Document Name	Action
	1	03/05/2012	GENAZ 32	Consultation Request	Edit
	2	03/05/2012	GENAZ 32	Consultation Request	Edit
	3	03/05/2012	GENAZ 49	Print Only - IEP Signature Page	View

Figure 4-25 Print Only Doc in Existing Docs

Deleting Ad Hoc Documents

Note: The ability to delete a document is based on a user's security level set up by individual district administration.

To delete an Ad Hoc document:

1. Check the box on line of document to delete.
2. Click save at the top of the screen. The document is permanently deleted.

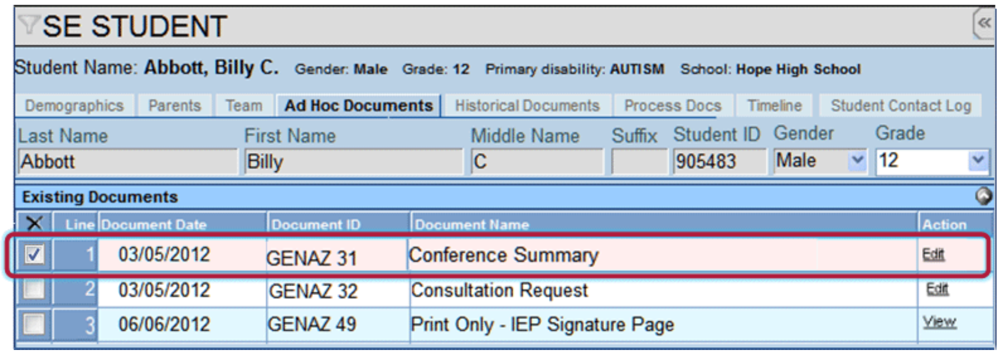


Figure 4-26 Delete Column in Ad Hoc Documents

Moving Ad Hoc Documents to Historical Documents

Finalized Ad Hoc Documents will be moved to the student's Historical Documents whenever a Process Rollover is conducted. There are a few exceptions to this rule.

Print Only Ad Hoc documents are not saved to the student's Historical Documents file. Once a Print Only Ad Hoc document is generated, it resides in the Ad Hoc Existing Documents list until a Process Rollover is conducted. At that point, all Print Only Ad Hoc documents are permanently removed from the system.

Certain Ad Hoc documents, such as the Consultation Request, are not required to be finalized at the time of a Process Rollover. The system allows the user to follow through with the Process Rollover and leave the Consultation Request in edit mode. The Consultation Request will continue to reside in Ad Hoc until finalized. The finalized version of this document will move to Historical Documents during the next Process Rollover.

Ad Hoc documents such as the Prior Written Notice and Meeting Request are required to be finalized prior to any Process Rollover. At that point they will be moved to Historical Documents with the student's current process documents.

Note: Each school district's system administrator has the ability to set Ad Hoc documents up "Outside the Process", which means they are not required to be finalized in order to conduct a Process Rollover. They move to Historical Documents during the next Process Rollover **only** if finalized.

Chapter Five: MANAGING SE STUDENTS AND STAFF

In this chapter, the following topics are covered:

- ► Managing student records
- ► Student Notifications
- ► The Team List
- ► Manage Student Teams

MANAGING STUDENT RECORDS

FINDING AND VIEWING STUDENTS CURRENTLY IN SYNERGY SE

Students only need to be imported in Synergy SE once. After that, those students are available for viewing and updating within Synergy SE.

To find a student currently in Synergy SE use any of the methods described in Chapter Two: Finding & Sorting Records.

IMPORTING A STUDENT FROM SYNERGY SIS

When a student is referred for special education or when a special education student transfers into the district, they will need to be imported into Synergy SE. A Synergy SE student import needs to be done only one time. After that, the student will exist in the special education database. If a student is ever terminated from Synergy SE, their documents will continue to be available from the SE Student screen, Historical Documents tab.

> **Note:** If any student data is changed in Synergy SIS, the changes will immediately be updated in Synergy SE!

Student imports can be conducted either through the SE Student screen or the Portfolio screen.

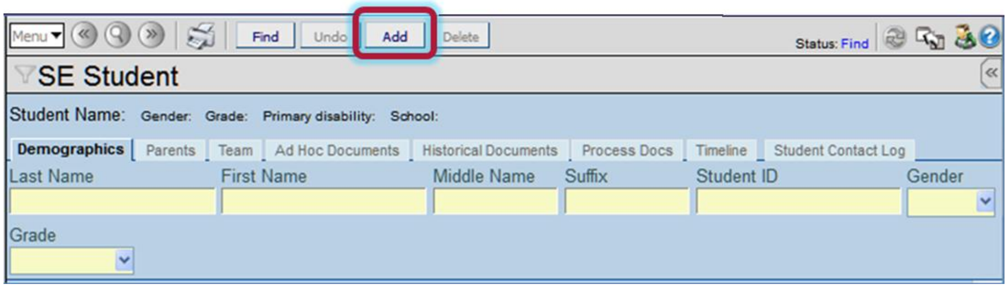


Figure 5-1 SE Student Screen Add Student Button

1. Navigate to the **SE Student** (or **Student**) screen.
2. Click **Add** at the top of the screen. The StudentSISFind screen opens in a separate window.

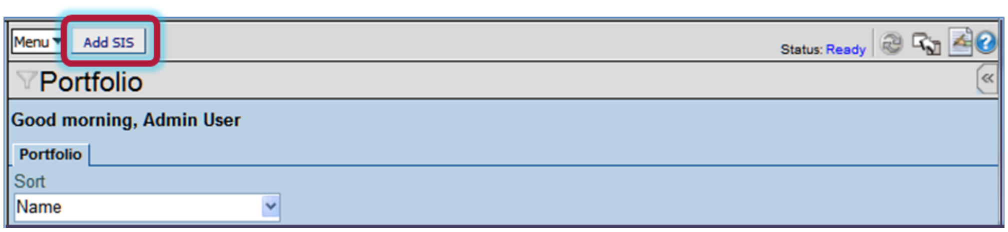


Figure 5-2 Portfolio Screen Add SIS Button

OR

1. Navigate to the **Portfolio** screen.
2. Click **Add SIS** at the top of the screen. The StudentSISFind screen opens in a separate window.

.

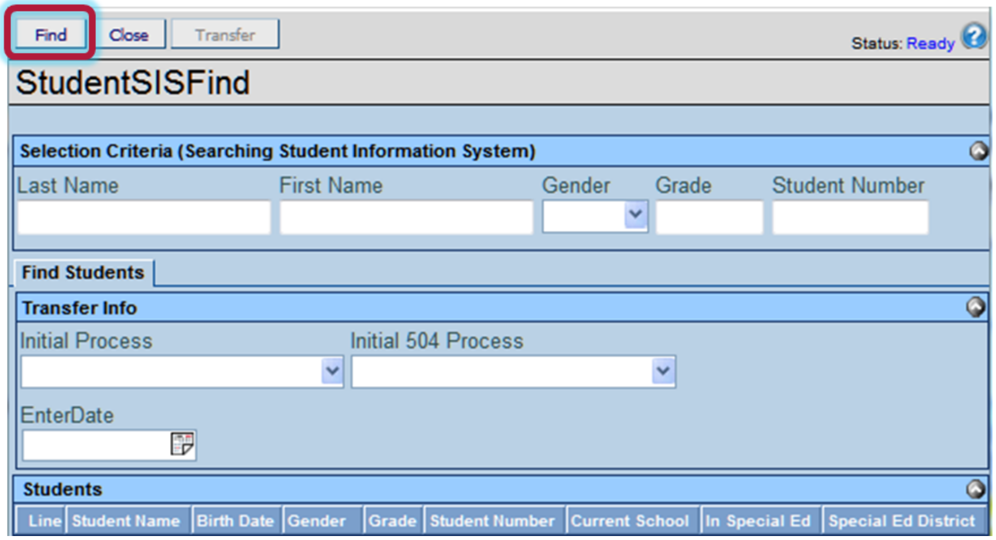
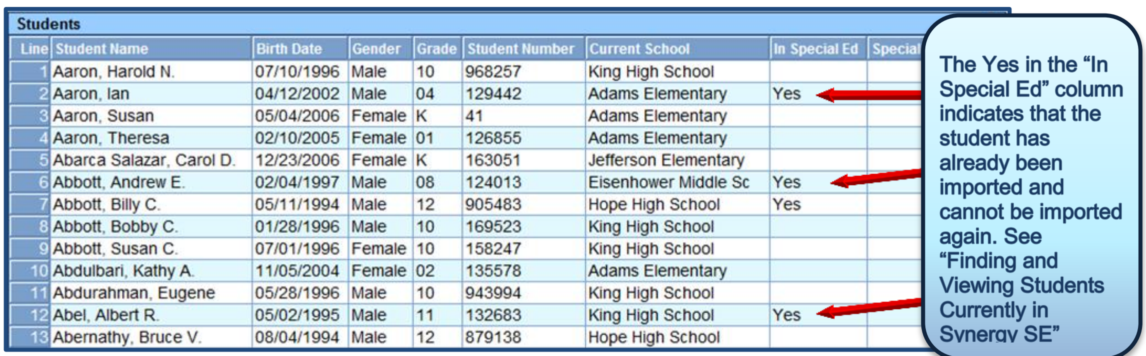


Figure 5-3 StudentSISFind Screen

When looking for student records, one or many of the selection criteria may be used. In some instances, it may be helpful to use more than one piece of information. For example, there may be several students with a last name of Smith.

3. Enter all or part of the Last Name, First Name and Student Number.
4. Click Find at the top to the screen. A list of students matching the criteria entered displays.



Students

Line	Student Name	Birth Date	Gender	Grade	Student Number	Current School	In Special Ed	Special
1	Aaron, Harold N.	07/10/1996	Male	10	968257	King High School		
2	Aaron, Ian	04/12/2002	Male	04	129442	Adams Elementary	Yes	
3	Aaron, Susan	05/04/2006	Female	K	41	Adams Elementary		
4	Aaron, Theresa	02/10/2005	Female	01	126855	Adams Elementary		
5	Abarca Salazar, Carol D.	12/23/2006	Female	K	163051	Jefferson Elementary		
6	Abbott, Andrew E.	02/04/1997	Male	08	124013	Eisenhower Middle Sc	Yes	
7	Abbott, Billy C.	05/11/1994	Male	12	905483	Hope High School	Yes	
8	Abbott, Bobby C.	01/28/1996	Male	10	169523	King High School		
9	Abbott, Susan C.	07/01/1996	Female	10	158247	King High School		
10	Abdulbari, Kathy A.	11/05/2004	Female	02	135578	Adams Elementary		
11	Abdurahman, Eugene	05/28/1996	Male	10	943994	King High School		
12	Abel, Albert R.	05/02/1995	Male	11	132683	King High School	Yes	
13	Abernathy, Bruce V.	08/04/1994	Male	12	879138	Hope High School		

Figure 5-4 StudentSISFind Screen Search Results

Note: If Synergy SE does not find any students that match the search criteria, this message displays.

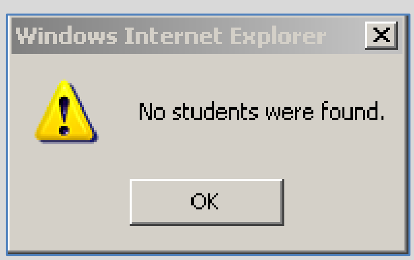


Figure 5-5 Synergy SE System Message

Click **OK** and check the search criteria. To change the search criteria, re-enter data in the group box. If the message returns, the student may not be available.

5. Select the appropriate processfor the student from the **Initial Process drop down**

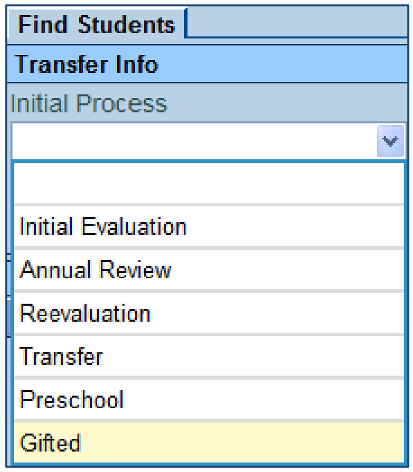
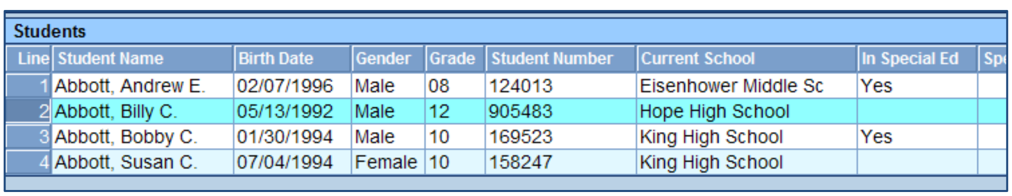


Figure 5-6 StudentSISFind Screen Initial Process Selections

Tip: Is the student transferring in from another school district? Select the Transfer Process. Is the student a new special ed referral? Select the Initial Process. If a student is brought into the wrong process he or she can always be moved to the correct process once imported into Synergy SE. See: [Chapter Six: Process Overview.]

6. Insert the **EnterDate** or click and select the date.


Students

Line	Student Name	Birth Date	Gender	Grade	Student Number	Current School	In Special Ed	Sp
1	Abbott, Andrew E.	02/07/1996	Male	08	124013	Eisenhower Middle Sc	Yes	
2	Abbott, Billy C.	05/13/1992	Male	12	905483	Hope High School		
3	Abbott, Bobby C.	01/30/1994	Male	10	169523	King High School	Yes	
4	Abbott, Susan C.	07/04/1994	Female	10	158247	King High School		

Figure 5-7 StudentSISFind Screen Highlight Student Row

7. Click on the student's record to highlight.
8. Click **Transfer** at the top of the screen.

Or, just double click on student's record. The webpage displays this message.

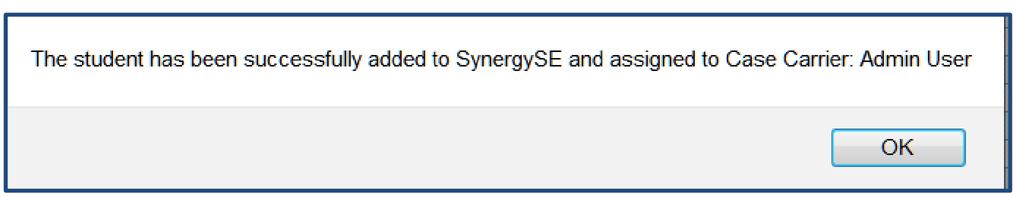


Figure 5-8 Message from Webpage

A dialogue window will appear stating that the student was successfully added to Synergy SE. Unless the school district has set the default Case Carrier option, the user who conducts the import will be assigned as the Case Carrier for that student.

STUDENT NOTIFICATIONS

Student notifications can be created to alert staff about special types of student circumstances. The student notification icon is then displayed on any screen where the student is in focus. To add a notification regarding a student,

1. Go to the **Student Notifications** screen, found under Synergy SE > Student.

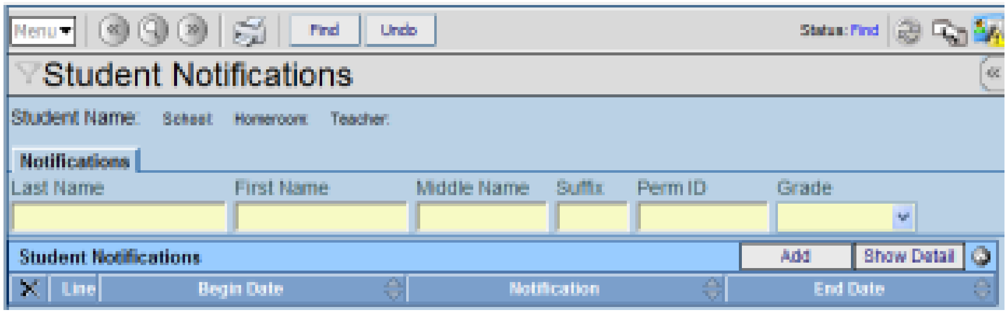


Figure 5-9 Student Notifications Screen

2. Find the student's records using either the **Scroll** buttons or **Find mode** as outlined in [Chapter Two]() of this guide.

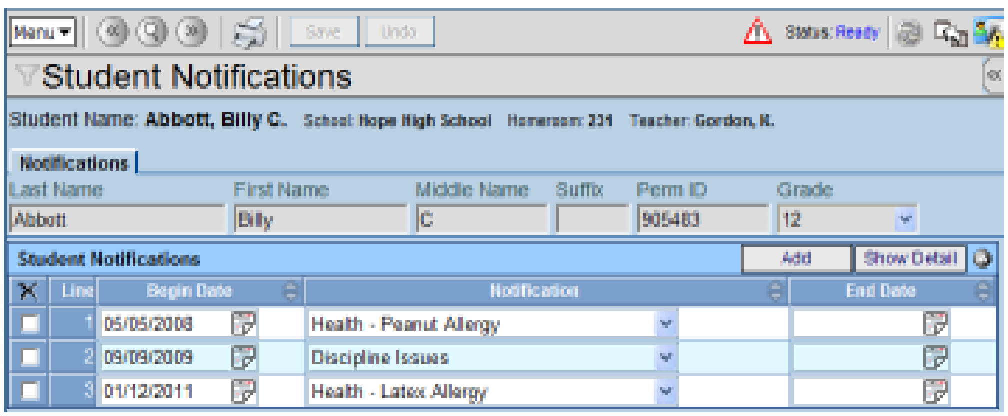


Figure 5-10 Student Notifications Screen, Student Record

3. To add a new notification, click the **Add** button in the Student Notifications section. A new blank line is added to the grid.

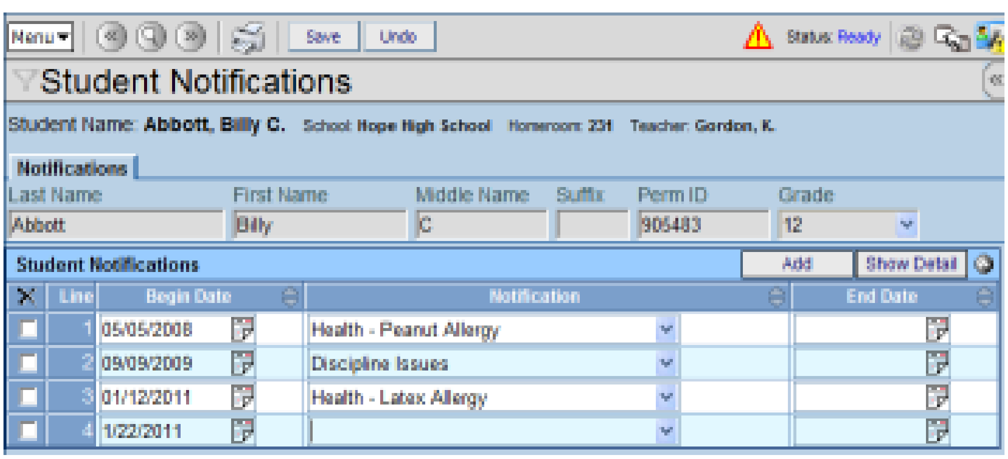


Figure 5-11 Student Notifications Screen, Adding.

4. By default, the **Begin Date** is set to today's date. To edit it, enter the date in MM/DD/YY format or it can be selected by clicking on the Calendar button.
5. Select the type of notification from the **Notification** drop-down list. This list is customizable for each district.
6. If this is a temporary condition, an end date can be assigned to the notification by entering the **End Date** in MM/DD/YY format or it can be selected by clicking on the Calendar button.
7. Click the **Save** button at the top of the screen to save the notification.
8. To delete a notification, click the box in the **X** column and click the **Save** button at the top of the screen.
9. To add a comment or additional detail about the notification, click the **line number** of the record you wish to edit. The line highlights.
10. Click the **Show Detail** button or click the line number again. The detail view displays on the right side of the screen.

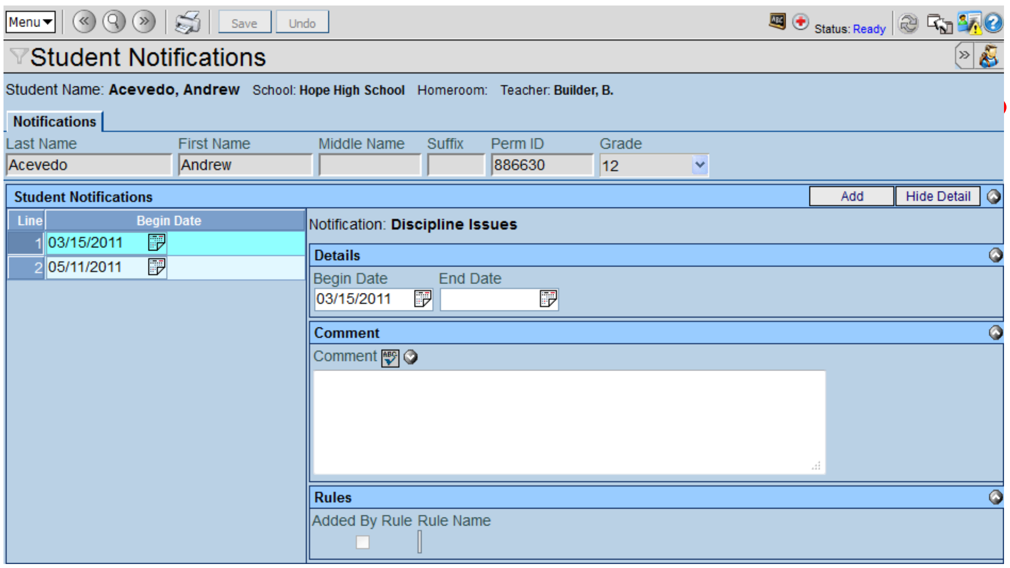


Figure 5-12 Student Notifications Screen - Detailed Screen

11. Notes or comments about the notification can be added to the **Comment** box. The text can be checked for spelling by clicking the **Spell Check** button.
12. The **Rules** section, if this notification was generated because of a rule, displays that it was added by a rule and includes the name of the rule.
13. Click the **Save** button at the top of the screen to save the changes.

THE TEAM LIST

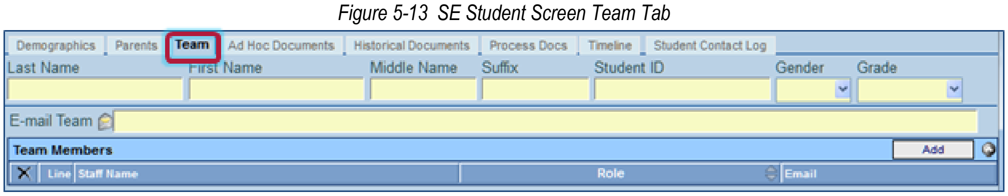
The Team displays the student's special education team members. Users who belong to a student's team list will see that student displayed in their Portfolio screen. The team list also imports into several special education documents such as the MET Report and IEP.

A student's Team List can be accessed either:

A student's Team List can be accessed through the SE Student screen or the Portfolio screen.

1. Navigate to the **SE Student** (or **Student**) screen.
2. Click on the **Team** tab. The student's Team List screen will open.

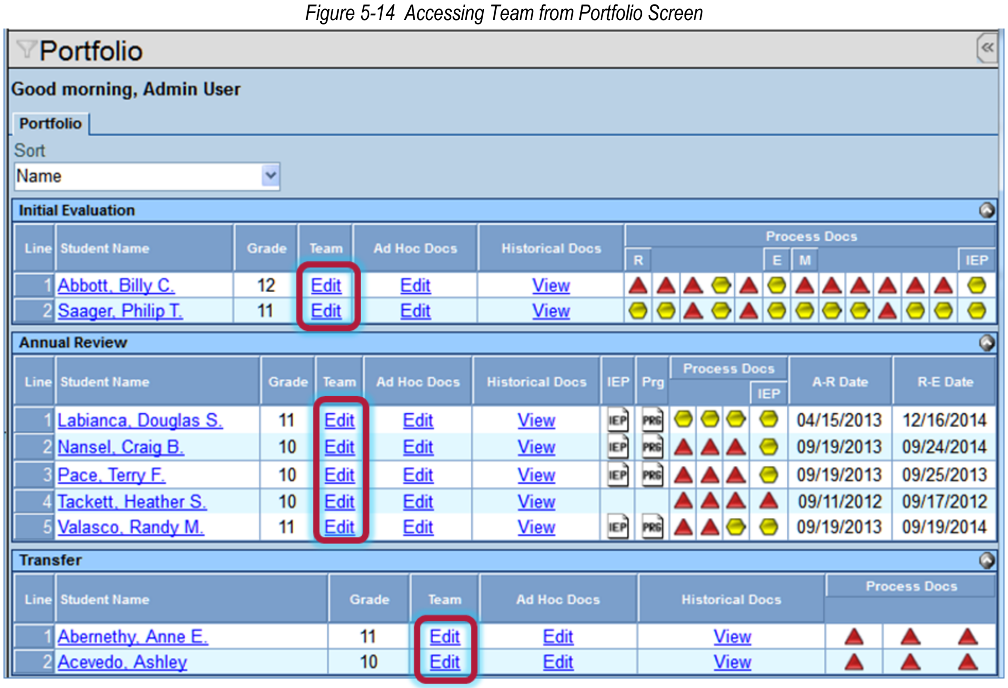
Figure 5-13 SE Student Screen Team Tab



OR

1. Navigate to the **Portfolio** screen.
2. Click on the **Edit** link in the Team Column. The student's Team List screen will open.

Figure 5-14 Accessing Team from Portfolio Screen



The **Team Members** section displays all staff members who currently belong to the student's special education team. It identifies each member's role and provides their email address.

ASSIGNING OR CHANGING THE STUDENT'S CASE CARRIER:

When a student is imported into Synergy SE, the system assigns the student a Case Carrier in one of two ways:

1. If the school has the default Case Carrier option enabled, the system assigns that individual as the Case Carrier for that student.

2. If the school does not have the default Case Carrier option enabled, the system will assign the user who initially imported the student into Synergy SE.

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

To change the Case Carrier

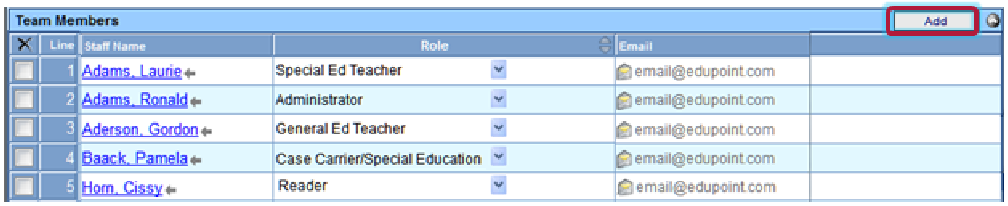


Figure 5-15 SE Student Screen Team Tab Team List

1. On the Team tab screen, click the **Add** button. The Staff Search screen opens.

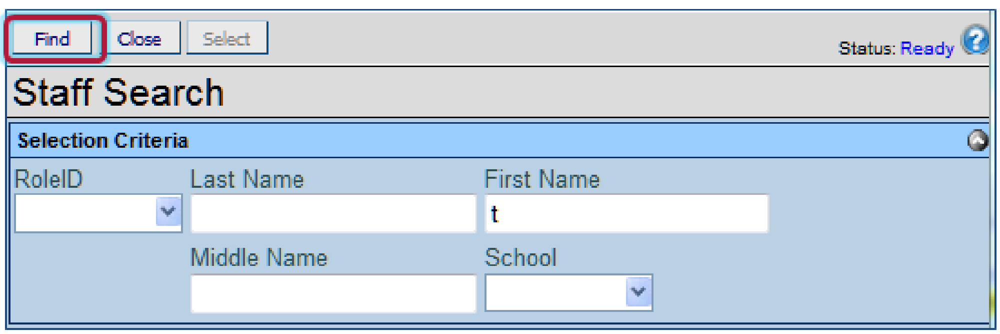


Figure 5-16 Staff Search Screen

2. Enter any or all of the information in the white fields, including the **Role ID** drop-down, if known.
3. Click **Find** or press ENTER.
4. The staff matching the criteria entered are listed in the Search Result grid. Click on the **Staff name.** The name highlights in green.
5. Click the **Select** button at the top of the screen or just click on the **name** again to enter the name in the Team Members grid. The Staff Search window closes.

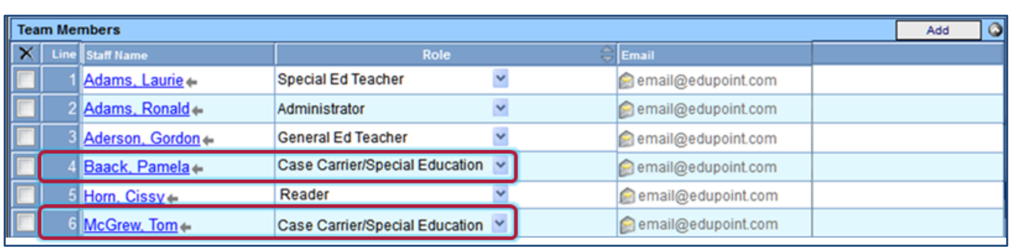


Figure 5-17 SE Student Screen Team List with Added Staff

6. Once the new Case Carrier has been added to the student's Team List, the previous Case Carrier can be removed.

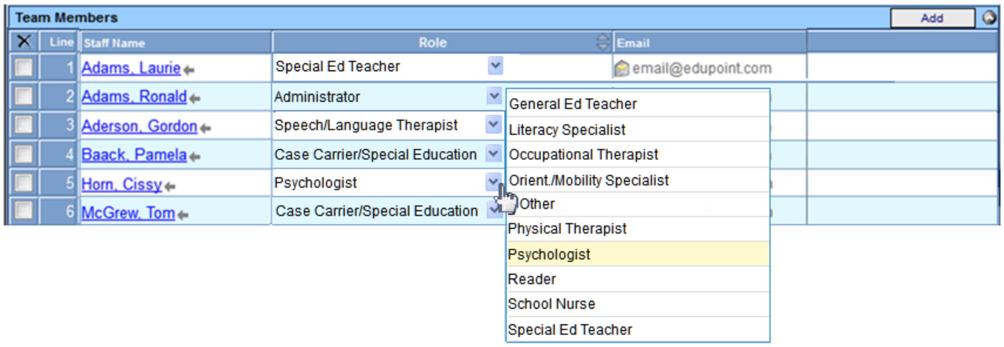


Figure 5-18 SE Student Screen Team Editing Team List

To delete the previous Case Carrier:

1. Select the **X (Delete)** checkbox in the Case Carrier's record row.
2. Click the **Save** button. The selected Case Carrier will be removed from the student's Team List.

The selected Case Carrier will be removed from the student's Team List.

> **Note:** If the user who assigned the new Case Carrier was the previous Case Carrier, that user will notice that the student has disappeared from his portfolio. The user will only be able to access the student from the Student screen unless they are re-assigned to the student's Team List..

MANAGE STUDENT TEAMS

Use the Manage Student Teams screen to copy/move students from one staff member's student team to another staff member's student team.

This screen may also be used to remove a student from a staff member's student list without providing a replacement.* (*see Note: below)

ACCESS THE MANAGE STUDENT TEAMS SCREEN

Figure 5-19 Synergy SE Navigation Tree

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

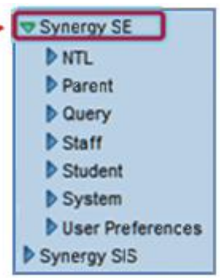


Figure 5-20 Synergy SE Folder Expanded

1. 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.

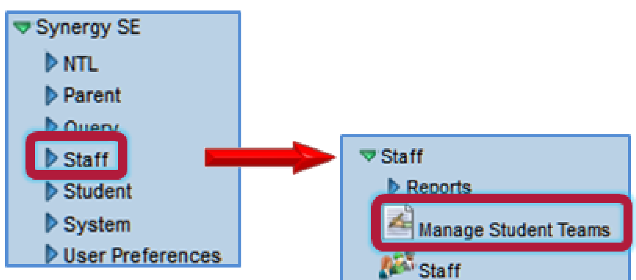


Figure 5-21 Expanded Staff Folder

2. Under the Synergy SE folder, click on the name **Staff** or pointing next to it**.**
3. Click on **Manage Student Teams.**

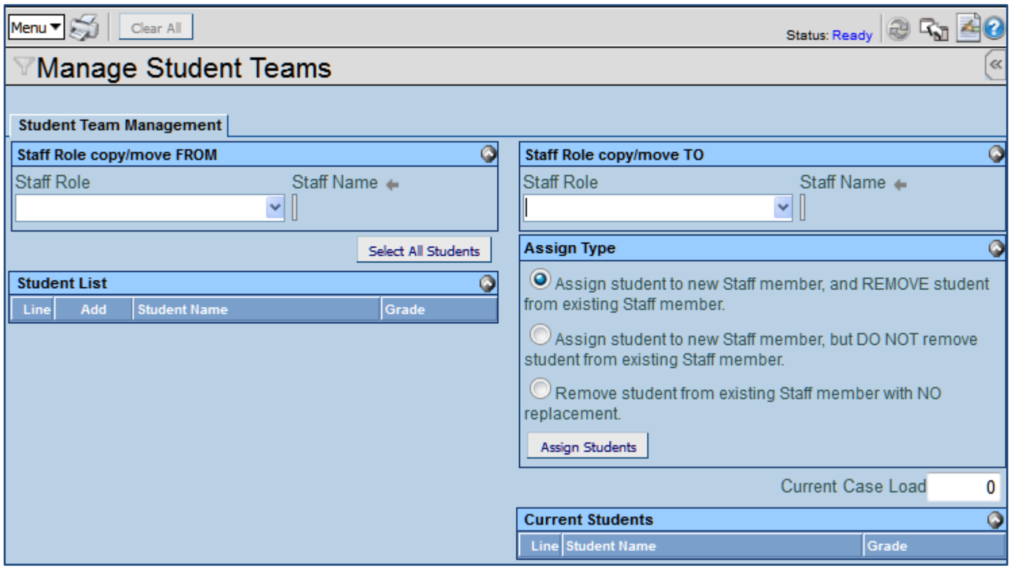


Figure 5-22 Manage Student Teams Screen

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

First select the staff member whose students will be *removed or reassigned.*

1. Click the **Staff Role** drop-down in the Staff Role copy/move FROM section. Select the role of the staff member whose student(s) will be reassigned.

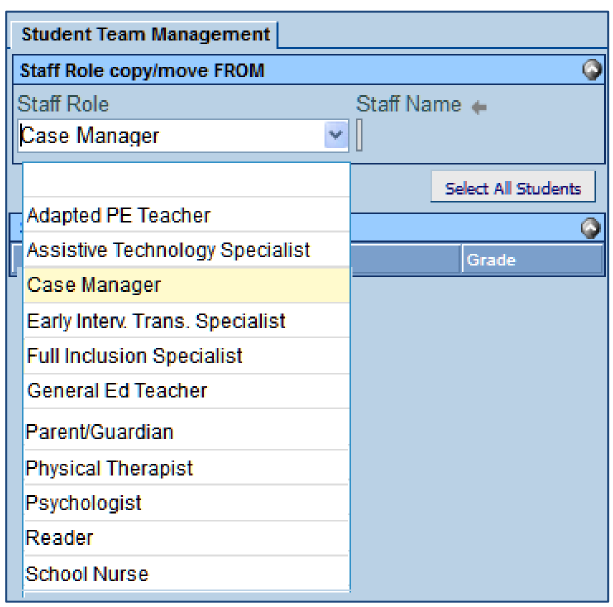


Figure 5-23 Manage Student Teams Screen Staff Role Selection

2. Click the ⬅ next to **Staff Name** in the Staff Role copy/move FROM section. The Find Staff screen displays.

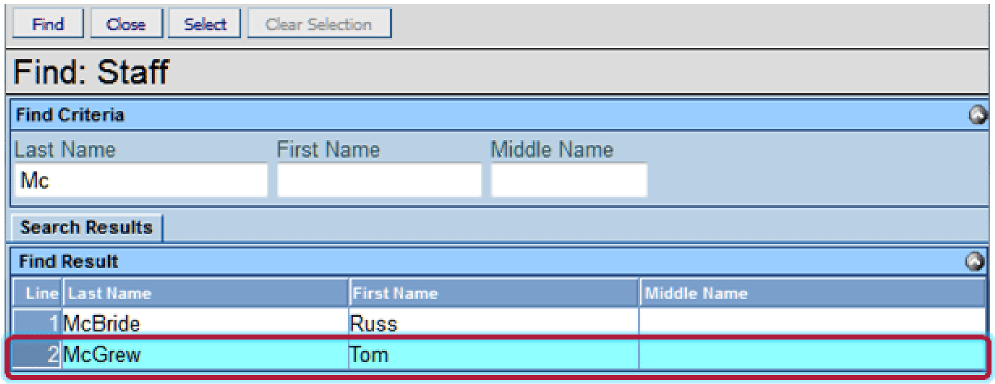


Figure 5-24 Find: Staff Screen

3. Enter all or part of staff member's **Last Name, First Name**.
4. Click **Find**. Search Results displays a list of matching criteria.
5. Click line of staff name. Line highlights.
6. Click again or click **Select**. The Find: Staff screen closes and the staff name displays

This staff person's student list displays in the Student List section.

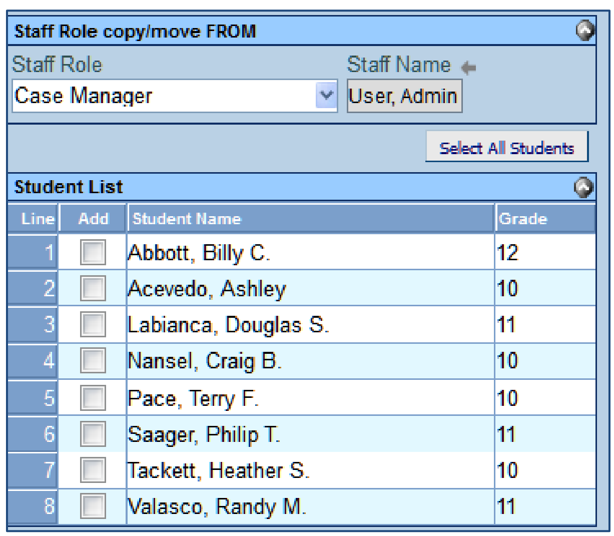


Figure 5-25 Manage Student Teams Screen Student List

To remove a student name from a staff member without providing a replacement, proceed to final step. Otherwise, select the staff member who will receive the students.

7. In the Staff Role copy/move TO section on the right side of the screen, repeat **Steps 1 through 6** above. The Staff Role does not have to be the same, except when removing or moving students from the Case Manager, when there must be a replacement Case Manager.

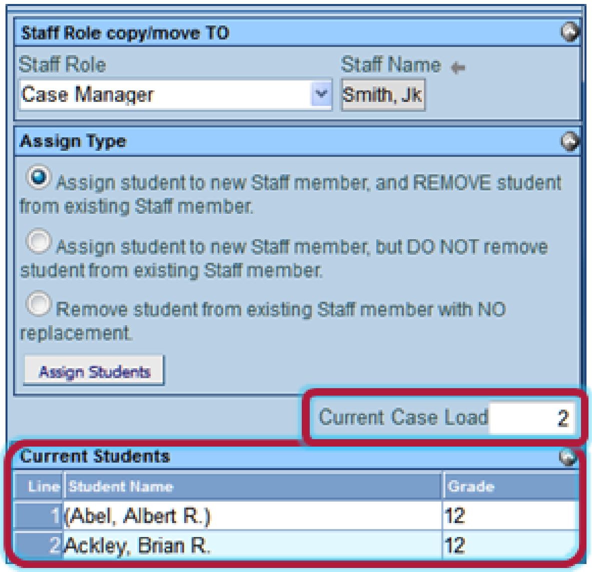


Figure 5-26 Manage Student Teams Screen Current Case Load and Students

This staff member's student list displays in the Current Students section. Their Current Case Load displays above the Current Students.

Next, select the students to assign or remove.

1. Check the box in the Add column next to the Student Name for each student to assign or remove.

   OR

   Click Select All Students.

2. In the Assign Type section, read the description next to each radio button. The table below describes the results when you click the **Assign Students.**

RADIO BUTTON	ACTION
Assign student to new Staff member, and REMOVE student from existing Staff member.	Synergy SE moves the student name(s) from the Student List to the Current Students list and increases the value in the *Current Case Load.*
Assign student to new Staff member, but DO NOT remove student from existing Staff member.	Synergy SE populates the Current Students list and increases the value in the *Current Case Load*. The students selected remain assigned to the existing Staff member.
Remove student from existing Staff member with NO replacement.	Synergy SE removes selected student(s) from existing staff member's Student List.

3. Click radio button of desired selection.
4. Click Assign Students.

.

Chapter Six: PROCESS OVERVIEW

In this chapter, the following topics are covered:

- Initial Process Rollover
- Annual Review Process Rollover
- Reevaluation Process Rollover
- Transfer Process Rollover
- Preschool Process Rollover
- Conducting a manual process move

Process Rollover

A student will move from one process to another as his or her documents are completed and finalized. All finalized documents will be sent to Historical Documents and the student will be moved to the next appropriate process.

Students can also be manually moved from one process to another if the need arises. However, all existing documents will either need to be deleted or finalized prior to moving the student.

The following rollover scenarios are available within Synergy SE:

- **Initial Process Rollover**
- **Annual Review Process Rollover**
- **Reevaluation Process Rollover**
- **Transfer Process Rollover**
- **Preschool Process Rollover**
- **Manually Moving a Student to Another Process**

Initial Process Rollover

- Students who are undergoing an initial evaluation are placed in the Initial Process.
- Documents are created and finalized as the student moves through the Initial Process.
- The IEP is the "trigger" document for this process. When the IEP is validated and finalized the student will move to the Annual Review Process for the upcoming review to be conducted.
- All documents that were created and finalized in the Initial Process will be moved to Historical Documents.
- A "working copy" of the IEP is available to begin editing for the student's upcoming Annual Review IEP.
- The AR Date and RE Date reflect the new due dates for the student's next review and reevaluation. The AR Date updates from the IEP Date by ONE YEAR MINUS ONE DAY and the RE Date updates from the MET Date by THREE YEARS MINUS ONE DAY. (For example if the IEP and MET Date are 5/25/2010, the new AR Date will be 5/24/2011 and the RE Date will be 5/24/1013.).
- The goals that were added to the Initial IEP for the student are available in the Progress Report for the quarterly progress reports.
- After a student's Initial Evaluation has been completed the student will have moved to Annual Review and the following changes will have occurred:

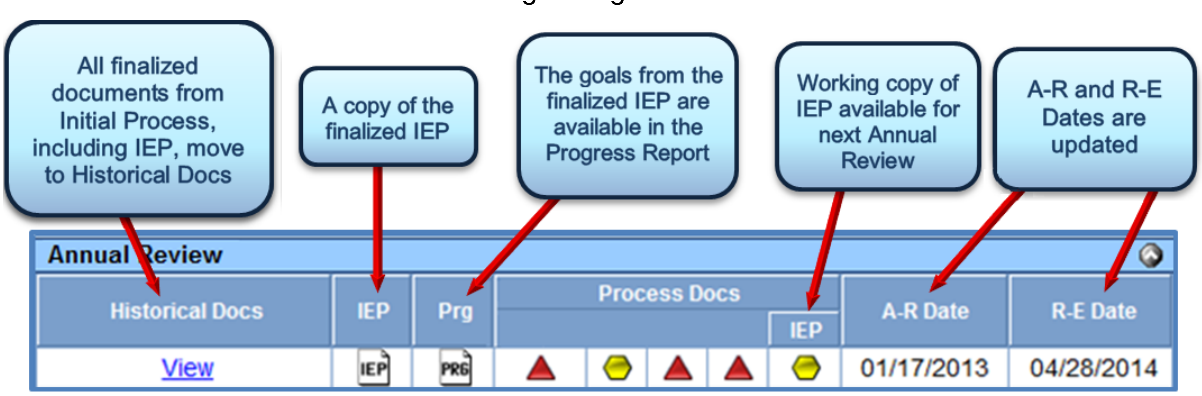


Figure 6-1 Initial Process Rollover Result

Annual Review Process Rollover

- When a Review is completed for a student in the Annual Review Process, all process documents, including the IEP, will be Finalized.
- The IEP is the "trigger" document that, when validated and finalized, will move the process documents into Historical Docs.
- The **AR date** will be updated from the IEP Date by ONE YEAR, MINUS ONE DAY. (For example, if the IEP Date is 5/25/2010, the new AR Date will be 5/24/2011.
- Goals from the Finalized IEP will be available in the Progress Report for Quarterly Progress Reporting
- Students in the Annual Review Process will remain until SIX MONTHS prior to their Reevaluation Date, at which point they will automatically move to the Reevaluation Process to prepare for their Triennial Evaluation.

  OR

  Until they are manually moved to another process.
- After a student's Annual Review has been completed the following changes will have occurred*:

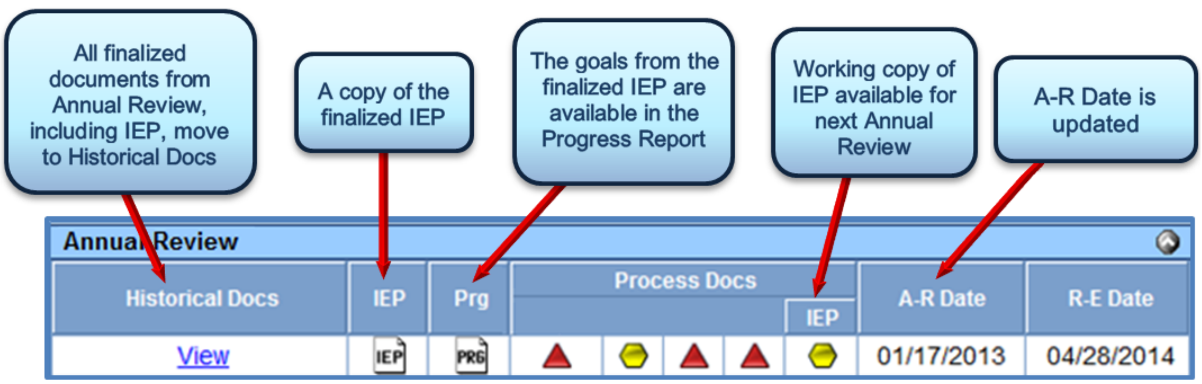


Figure 6-2 Annual Review Process Rollover Result

*(If the student's Reeval Date is due in less than SIX MONTHS they will have moved to the Reevaluation Process.

Reevaluation Process Rollover

- When a Reevaluation is completed for a student in the Reevaluation Process, all process documents, including the IEP, will be Finalized.
- The IEP is the "trigger" document for this process. When the IEP is validated and finalized the student will move to the Annual Review Process.
- All documents that were created and finalized in the Reevaluation process will be moved to Historical Docs.
- A "working copy" of the IEP is available to begin editing for the student's next Annual Review IEP.
- The **AR Date** and **RE Date** reflect the new due dates for the student's next review and reevaluation. The AR Date updates from the IEP Date by ONE YEAR MINUS ONE DAY and the RE Date updates from the MET Date by THREE YEARS MINUS ONE DAY. (For example if the IEP and MET Date are 5/25/2010 the new AR Date will be 5/24/2011 and the RE Date will be 5/24/1013.)
- The goals that were added to the Reevaluation IEP for the student are now available in the Progress Report for the quarterly progress reporting.
- After a student's Reevaluation has been completed the student will have moved to Annual Review and the following changes will have occurred:

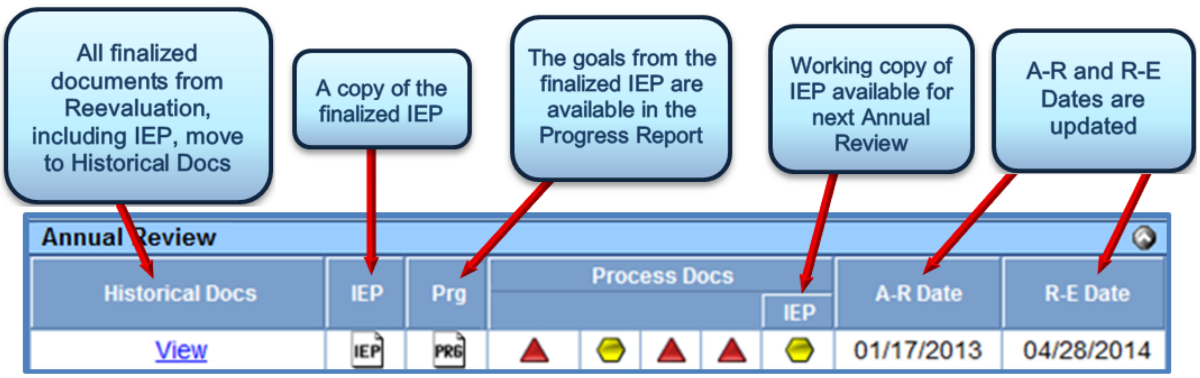


Figure 6-3 Reevaluation Process Rollover Result

Reevaluation Waiver Process Rollover

If the student's MET Team decides to waive the Triennial Reevaluation, a Notice of Reeval Waiver (GENAZ 15) is created. When that document is finalized the student will roll over to Annual Review. The R-E Date will update from the Document Date on the Notice of Reeval Waiver. (See Documents with Unique Functionality for more information)

TRANSFER PROCESS ROLLOVER

- Transfer students are special education students who have transferred into the district from another school district.
- Students placed in the Transfer Process can be moved to any process using the Transfer IEP Document.
- The **Transfer IEP Document** is the “trigger” document that will move the student to the appropriate process. When this document is finalized, all documents created within the Transfer Process for this student will be available in Historical Docs.
- The **AR Date**, **RE Date** and student’s **Disability** will update from the Transfer IEP Document.
- After a student’s Transfer has been completed the student will have moved to Annual Review and the following changes will have occurred*:

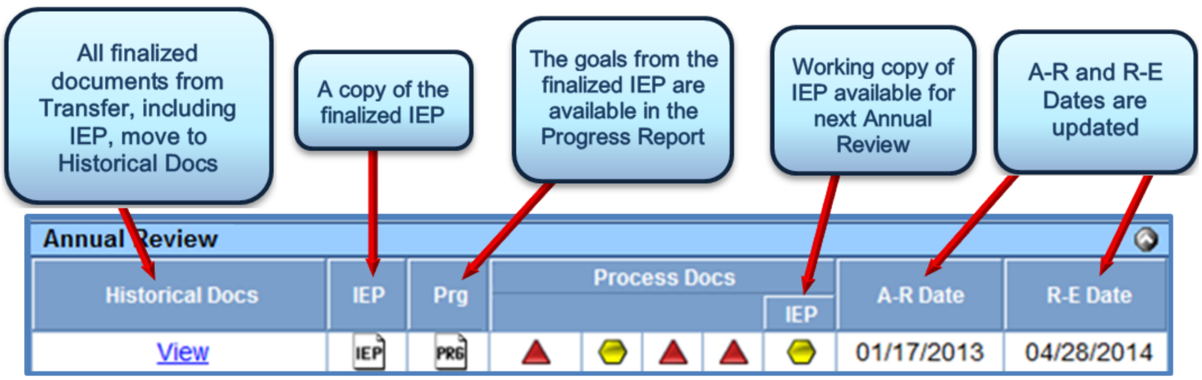


Figure 6-4 Transfer Process Rollover Result

*(If the student’s Reeval Date is due in less than SIX MONTHS they will have moved to the Reevaluation Process.

PRESCHOOL PROCESS ROLLOVER

- Preschool students who are undergoing an Initial Evaluation are placed in the Preschool Process.
- Documents are created and finalized as the student moves through the Preschool Process.
- The IEP is the "trigger" document for this process. When the IEP is validated and finalized the student will move to the Annual Review Process for the upcoming review to be conducted.
- All documents that were created and finalized in the Preschool Process will be moved to Historical Documents.
- A "working copy" of the IEP is available to begin editing for the student's upcoming Annual Review IEP.
- The **AR Date** and **RE Date** reflect the new due dates for the student's next review and reevaluation. The AR Date updates from the IEP Date by ONE YEAR MINUS ONE DAY and the RE Date updates from the MET Date by THREE YEARS MINUS ONE DAY. (For example if the IEP and MET Date are 5/25/2010 the new AR Date will be 5/24/2011 and the RE Date will be 5/24/1013.)
- The Goals that were added to the Initial IEP for the student are now available in the Progress Report for the quarterly progress reports.
- After a student's Initial Evaluation has been completed the student will have moved to Annual Review and the following changes will have occurred:

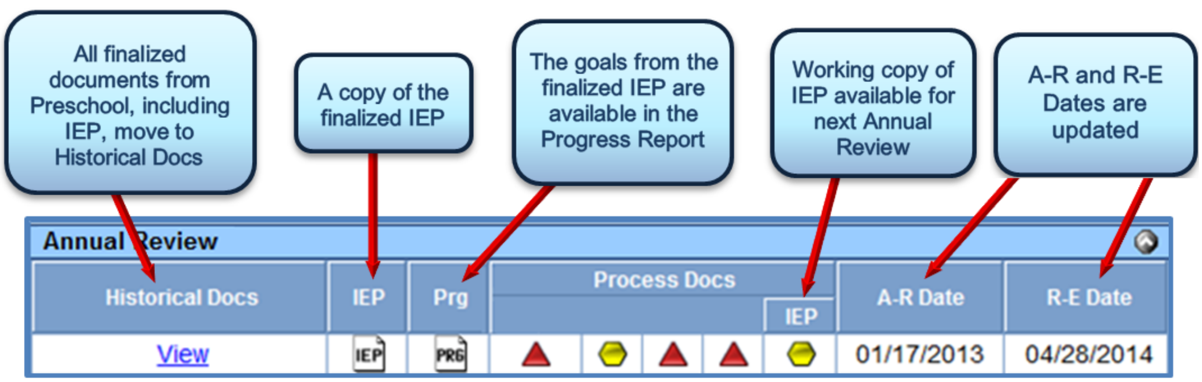


Figure 6-5 Preschool Student Rollover Result

CONDUCTING A MANUAL PROCESS MOVE

Students may be manually moved from one process to another, based on user security rights. The Process Move feature is available in the student's Process Docs Tab.

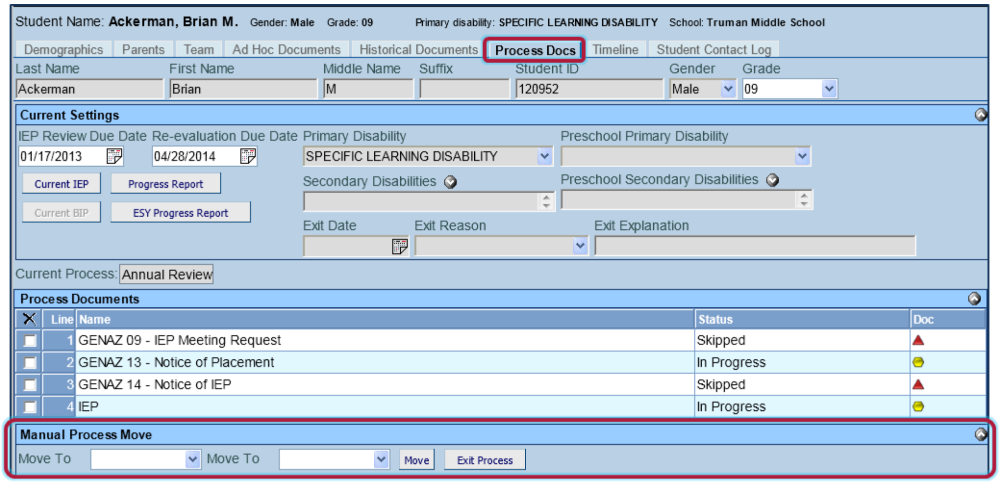


Figure 6-6 SE Student Screen Process Docs Tab Manual Move

> **Note:** Prior to moving a student to another process, verify that all "in process" documents have been deleted or finalized. (In process documents are documents in edit mode indicated by yellow icons.)

To manually move a student to another process:

1. Navigate to **SE Student Screen, Process Docs tab**.
2. Scroll to **Manual Process Move**.
3. Select the appropriate process from the first **Move To**.

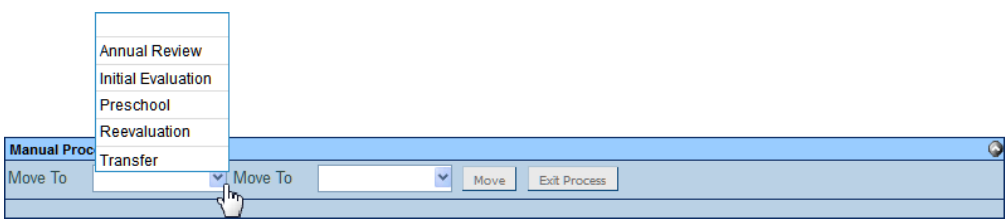


Figure 6-7 Manual Move Process Drop-down list

4. Click the **Move** button.
5. If there are any documents that have not been finalized or deleted you will be prompted to finalize or delete. A Move Student screen displays.

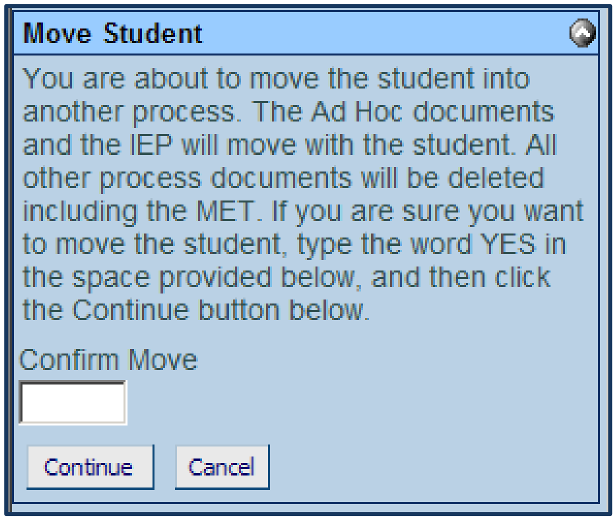


Figure 6-8 Move Student Message Box

6. Type **Yes** in the **Confirm Move** and click the **Continue** button. The student displays in the new process.

To manually exit a student from special education:

1. Navigate to **SE Student Screen, Process Docs tab**.
2. Scroll to **Manual Process Move**.

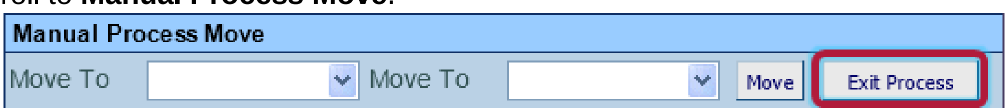


Figure 6-9 SE Student Screen Process Docs Tab Exit Process Button

3. Click the **Exit Process** button. The Student Exit from Special Ed window displays.
4. Enter the **Exit Date** MM/DD/YY format or click and select.
5. From the drop down select the appropriate **Exit Reason**.
6. Type in the **Exit Explanation** in the textbox.
7. Click **Exit from Special Ed.**

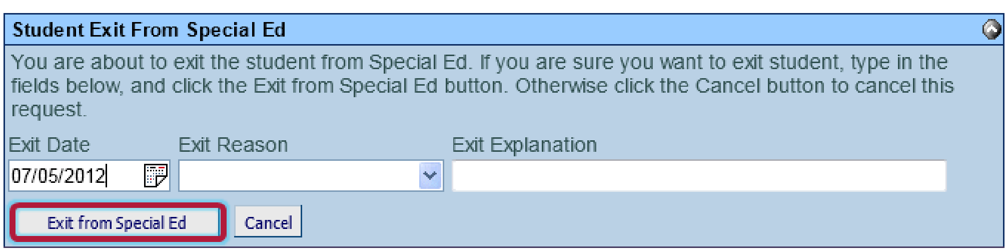


Figure 6-10 Student Exit from Special Ed

The student will be removed from all active special education processes. Any document created and finalized up to and including the Notice of Intent to Test, will move to the student's Historical Docs tab.

Chapter Seven:
STUDENT TRANSLATION DOCUMENTS

In this chapter, the following topics are covered:

- Access the Student Translation Documents screen
- Translating documents

STUDENT TRANSLATION DOCUMENTS

Synergy SE allows for document templates to be translated into other languages for parents and guardians needing documents in a different language.

ACCESS THE STUDENT TRANSLATION DOCUMENTS 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.

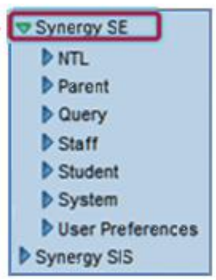
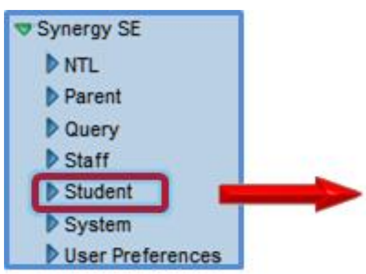


Figure 7-2 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the name **Student** or ▷ pointing right next to it.



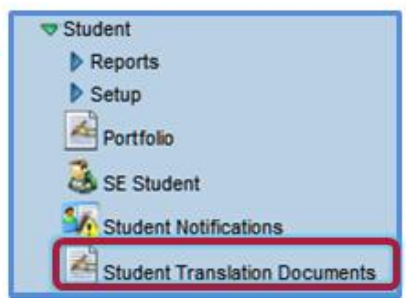


Figure 7-3 Expand Student Folder

4. Click on **Student Translation Documents**.

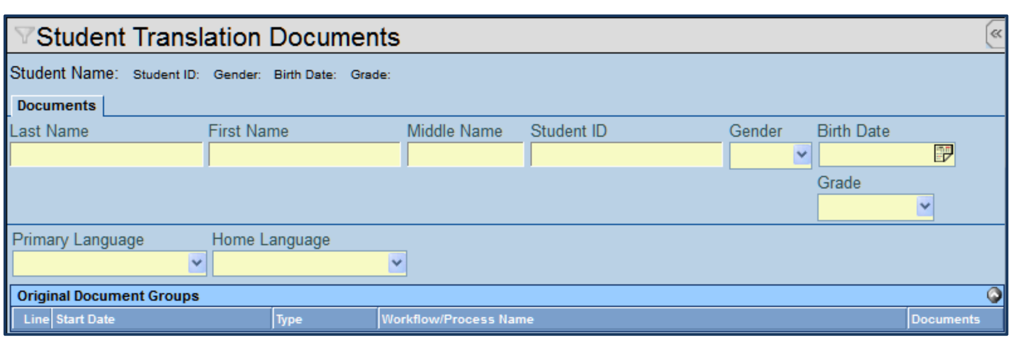


Figure 7-4 Student Translation Documents Screen

TRANSLATE A PROCESS DOCUMENT

5. Enter the student's **Last Name** and **Student ID** number.
6. Click **Find** or press ENTER.

If the student's full name or Student ID is unknown, use the available search options explained in Chapter Two: Finding & Sorting Records.

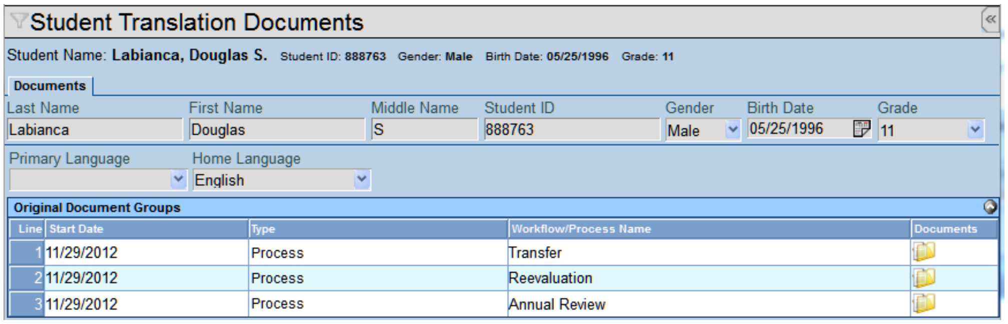


Figure 7-5 Student Translation Documents Screen

The Original Document Groups separates the available documents by the processes the student has been in or may be in currently.

1. Click on the **Document** icon in the Workflow/Process where the document to translate resides. The Translation Documents screen opens.

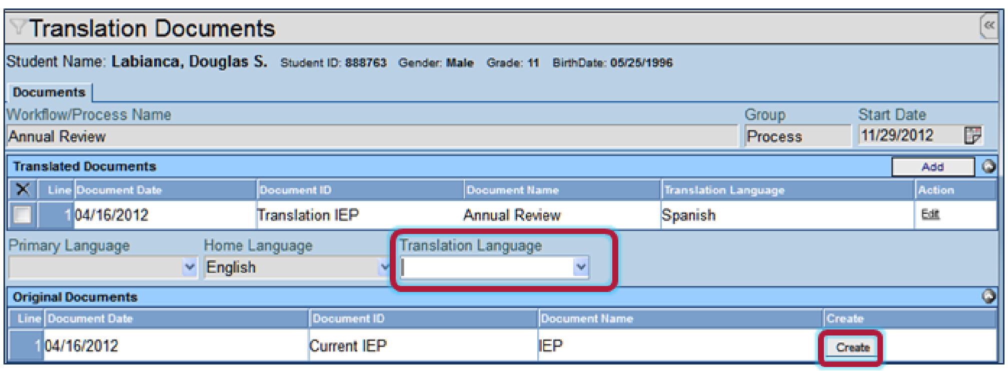


Figure 7-6 Translation Documents Screen

Documents that have been translated display in the first section, Translated Documents, along with the language used in the translation.

2. Click on the **Translation Language** drop-down and select the language to use.
3. In the Original Documents section, click the **Create** button next to the document to be translated.

Note: Selecting the Translation Language will filter the results of the Original Documents available for translation. Some documents may not be available in all languages.

The document now displays in the **Translated Documents** section with the Document Date, Document ID, Document Name, Translation Language, and Action.

4. Click the **Edit** link in the Action column to open the document for editing.

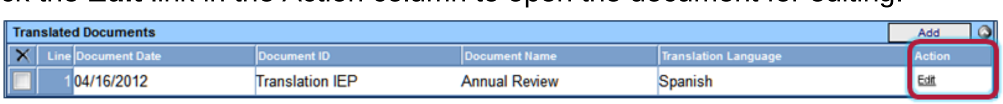


Figure 7-7 Translation Documents Screen Edit Option

Figure 7-8 Document Title with Language of Translation

The document screen opens. The language of translation displays next to the document title. The document will open allowing users to input or edit any additional information.

Chapter Eight: Synergy SE Reports

In this chapter, the following topics are covered:

- What reports are available through Synergy SE Staff
- What reports are available through Synergy SE Student
- How to customize the reports prior to printing
- Using the Job Queue Viewer

STAFF REPORTS

The available reports for Staff are found under Synergy SE > Staff.

Figure 8-1 Synergy SE Navigation Tree

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

2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or the **blue triangle** 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 click on the **blue triangle** pointing next to it.

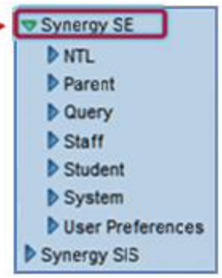
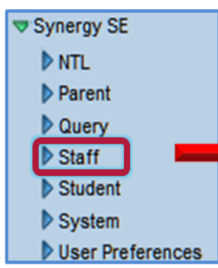


Figure 8-2 Synergy SE Folder Expanded

4. Under the Staff folder, click on the name **Reports** or click on the blue triangle pointing right next to it.



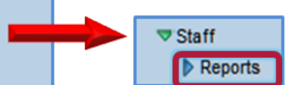


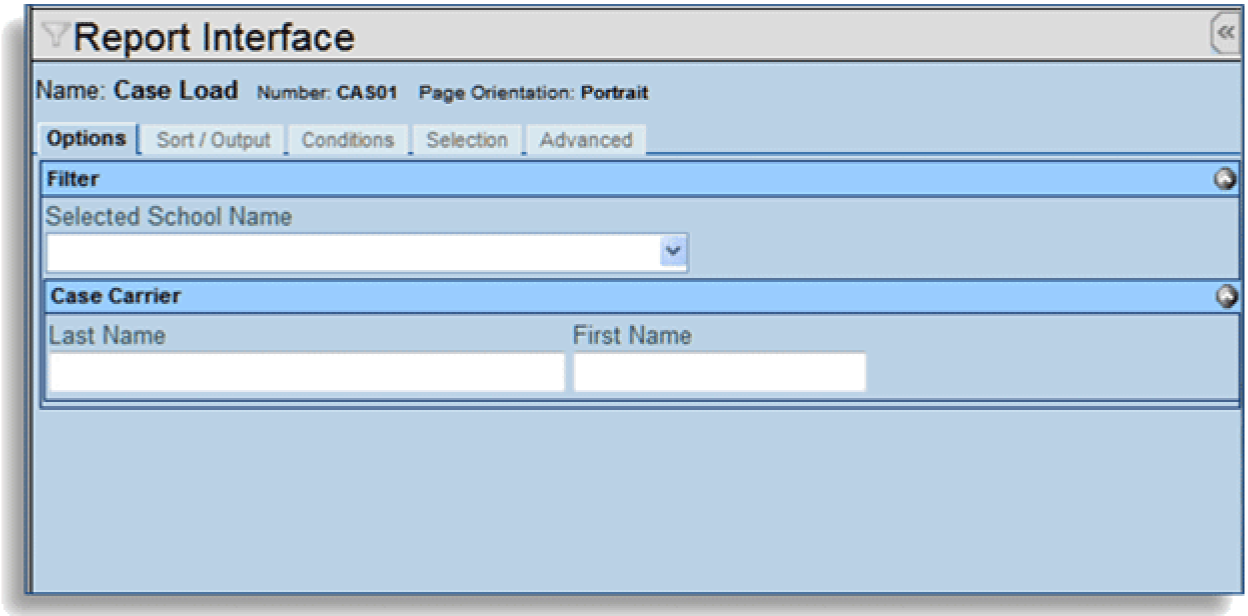
Figure 8-3 Synergy SE Staff Reports

5. Click on the **name** or the **icon** of the report to open.
6. Select the options to be used in printing the report. The report descriptions follow.
7. Once the report options have been set, click on the **Print** button. The report will display as a PDF file, which can be sent to the printer or saved.

CAS01 – Case Load

PAD Location: Synergy SE>Staff>Reports

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



Report Options:

Filter:

School must be selected using the **Selected School Name**.

Case Carrier:

Optional to filter by individual staff name using Last Name and First Name. If these fields are left blank the entire case load for each user at the selected school will print.

Hope High School

Case Load

Year: 2011-2012
Report: CAS01

Case Carrier: User, Admin

Aaron, Ian
Aaron, Theresa
Abdulbari, Kathy A.
Alejandrez, Willie JR
Armenta, Sandra
Covington, Louis L.
Jack, Chris E.
Martinez, Henry E.
Maya, Diane P.
Pablo, Roy J.
Rabinowitz, Rose A.
(Student, Elementary D.)
Zelda, Manny

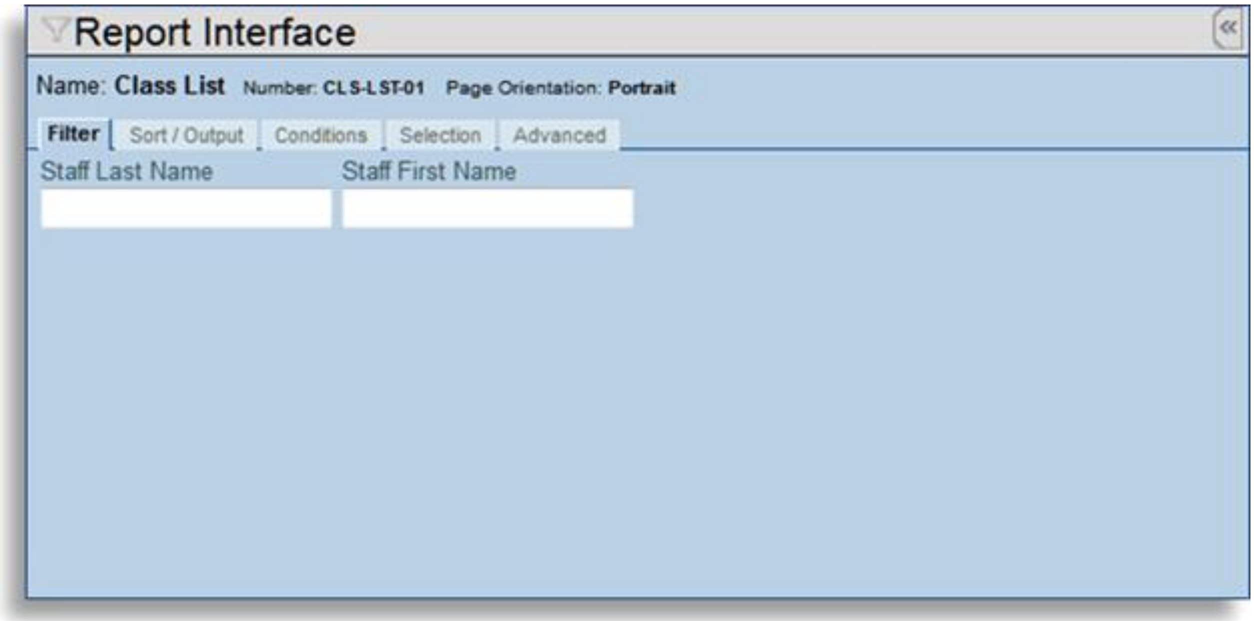
Total: 13

Printed by Admin User at 08/02/2012 1:21 PM Edupoint School District Page 1 of 1

CLS-LST-01 - CLASS LIST

PAD Location: Synergy SE>Staff>Reports

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



REPORT OPTIONS:

Enter **Staff Last Name** and **Staff First Name** to filter the team list for that staff member.

Edupoint School District

Adams Elementary School
Class List

Year: 2011-2012
Report: CLS-LST-01

Staff Name: Andrews, Mark

Student Name	Grade	Gender	School	Next IEP Date	Next Eval Date
Aaron, Ian	04	Male	Adams Elementary	11/05/2012	01/23/2015
Aaron, Theresa	01	Female	Adams Elementary		
Abdulbari, Kathy A.	02	Female	Adams Elementary		
Alejandrez, Willie JR	03	Male	Adams Elementary		
Armenta, Sandra	PS	Female	Adams Elementary		
Covington, Louis L.	03	Male	Adams Elementary		
Jack, Chris E.	01	Male	Adams Elementary	02/10/2012	02/10/2012
Martinez, Henry E.	03	Male	Adams Elementary	07/03/2013	02/26/2013
Maya, Diane P.	PS	Female	Adams Elementary		
Pablo, Roy J.	02	Male	Adams Elementary		
Rabinowitz, Rose A.	01	Female	Adams Elementary		
(Student, Elementary D.)	04	Female	Adams Elementary		
Zelda, Manny	05	Male	Adams Elementary		07/29/2015

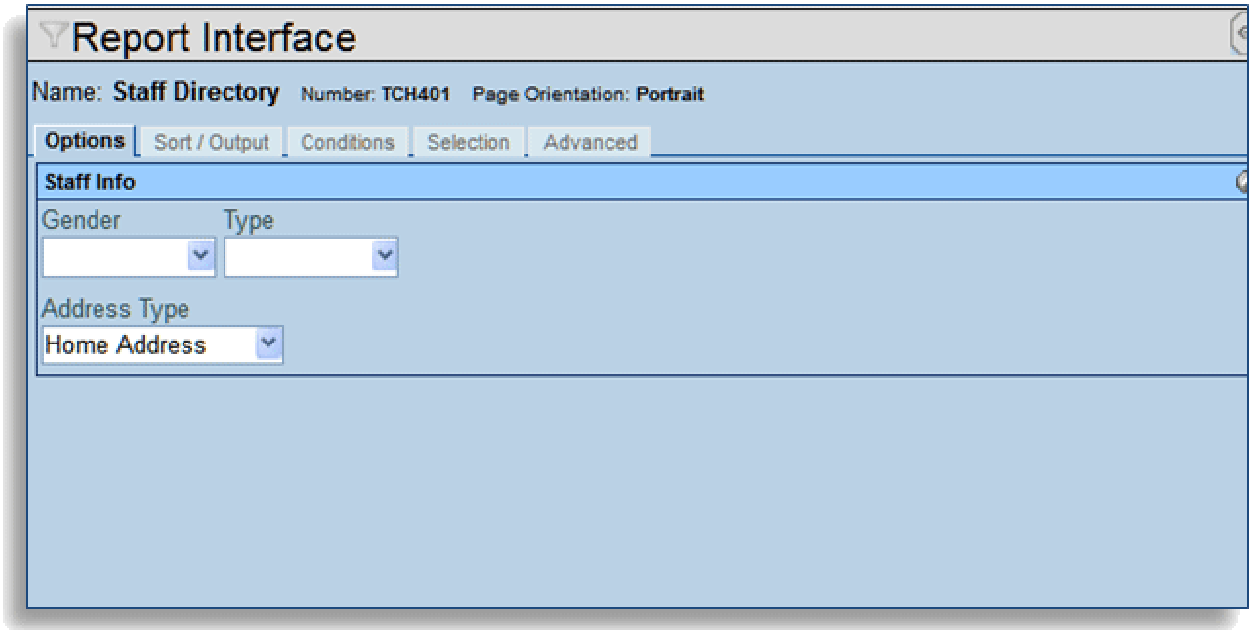
Total: 13 Students

Printed by Admin User at 07/30/2012 12:16 PM Edupoint School District Page 1 of 1

TCH401 - STAFF DIRECTORY

PAD Location: Synergy SE>Staff>Reports

The Staff Directory report prints the staff information for all staff at the school of focus. The report includes names, email addresses, telephone numbers and addresses of all staff members.



REPORT OPTIONS:

Staff Info:

Filter by **Gender**. Leave blank to return both genders.

Filter by job **Type** such as Teacher, Custodian, Counselor, or leave blank to return all job types.

Filter by **Address Type** such as Home or Mailing Address. Selecting blank field will return both address types.

Edupoint School District

Hope High School
Staff Directory

Year: 2011-2012
Report: TCH401

Staff Name	Gen	E-Mail	Phone Type	Phone Number	Phone Extn	Home Address	City	St	Zipcode
User, Admin	M	@edupoint.com				1060 W Addison	Gilbert	AZ	85222
Counselor									
Vesta, Cindy	F	email@ edupoint.com	Work	480-555-1234		1550 E McKellips Ste 107	Phoenix	AZ	85694
Maintenance									
McGrew, Tom	M	email@ edupoint.com	Work	480-555-1234	222	1550 E McKellips	Phoenix	AZ	85694
morris, eric	M	emorris@ edupoint.com							
Reed, Cindy	F	email@ edupoint.com							
Tester, ESR	M	email@ edupoint.com							
Teacher									
Aderson, Gordon	M	m@u.com	Cell	623-555-1234		456 Todays	Chandler	AZ	85225
Adm Office, Adm Office	M	email@ edupoint.com							
Andrews, Mark	M	email@ edupoint.com							
Arthur A., Andrea	F	email@ edupoint.com							
Attend Office, Attend Off	M	email@ edupoint.com							
Atwood S., Sharon	F	email@ edupoint.com							
Audio Visual, Audio Visual	M	email@ edupoint.com							
Baniszewski, Nancy	F	email@ edupoint.com							
Bayer M., Michelle	F	email@ edupoint.com							
Becker A., Allison	F	email@ edupoint.com							
Becker C., Chris	M	email@ edupoint.com							
Behm A., Angela	F	email@ edupoint.com							
Bellus G., Genice	M	email@ edupoint.com							
Blackburn M., Matt	M	email@ edupoint.com							
Blahak P., Pete	M	email@ edupoint.com							
Blasdell W., Wendy	F	email@ edupoint.com							
Bonjour R., Richard	M	email@ edupoint.com							
Bookstore, Bookstore	M	email@ edupoint.com							
Bordwell R., Robert	M	email@ edupoint.com							
Brady J., James	M	email@ edupoint.com							
Brandt P., Paula	F	email@ edupoint.com							
Breiland C., Cheryl	F	email@ edupoint.com							
Brook C., Clayton	M	email@ edupoint.com							
Brown P., Patricia	F	email@ edupoint.com							

Printed by Admin User at 07/30/2012 12:16 PM Edupoint School District Page 1 of 1

STUDENT REPORTS

The available reports for Student are found under the Synergy SE Student menu. Extract reports provide a total count of records processed. Individual reports print out information about a single student, but can be printed for multiple students at one time. Labels reports provide mailing labels for the students. List reports generate a list of students and their information as specified by the description. Summary reports generate summaries for multiple students.

To access the available Student reports:

Figure 8-4 Synergy SE Navigation Tree

1. Open the Synergy SE Navigation Tree by clicking on the **Tree** button.
2. Expand the Synergy SE folder by clicking on the name **Synergy SE** or the blue triangle pointing next to the word. Once clicked, the triangle will turn green and point downward.

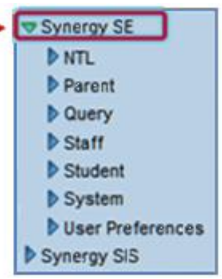
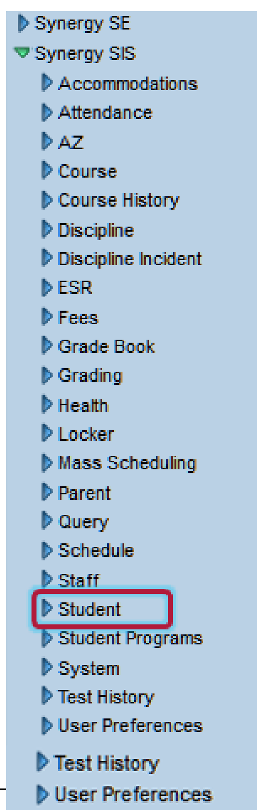
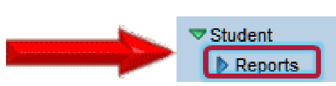


Figure 8-5 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the name **Student** or click on the blue triangle pointing right next to it.
4. Click on the name **Reports** or click on the blue triangle pointing right next to it.
5. Repeat the process to access any of the report categories.





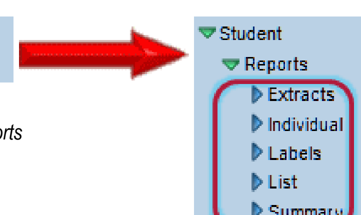


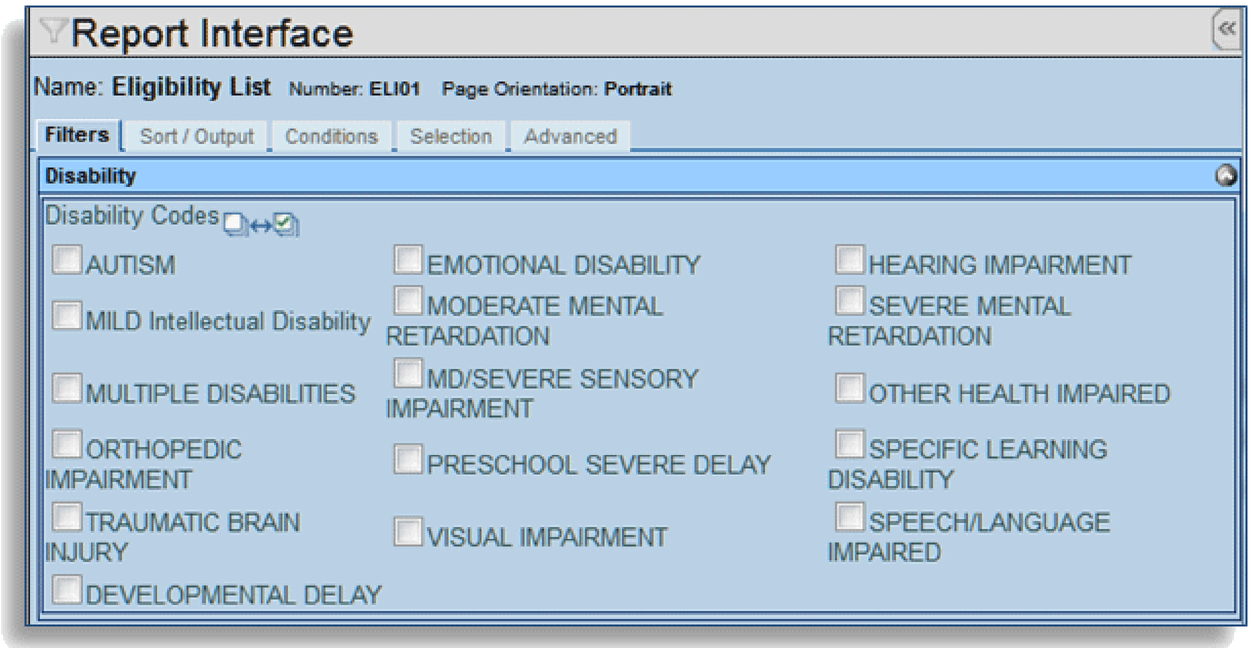
Figure 8-6 Expand Student Reports

6. Click on the **name** or the **icon** of the report to open.
7. Select the options to be used in printing the report. Individual report descriptions follow.
8. Once the report options have been set, click on the **Print** button. The report will display as a PDF file, which can be sent to the printer or saved.

ELI01 - ELIGIBILITY LIST

PAD Location: Synergy SE>Student>Reports

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



REPORT OPTIONS:

Disability:

Check specific disability to filter or check to select all. If NO disabilities are checked the report prints ALL student's primary disabilty.

Hope High School

Eligibility List

Year: 2011-2012
Report: ELI01

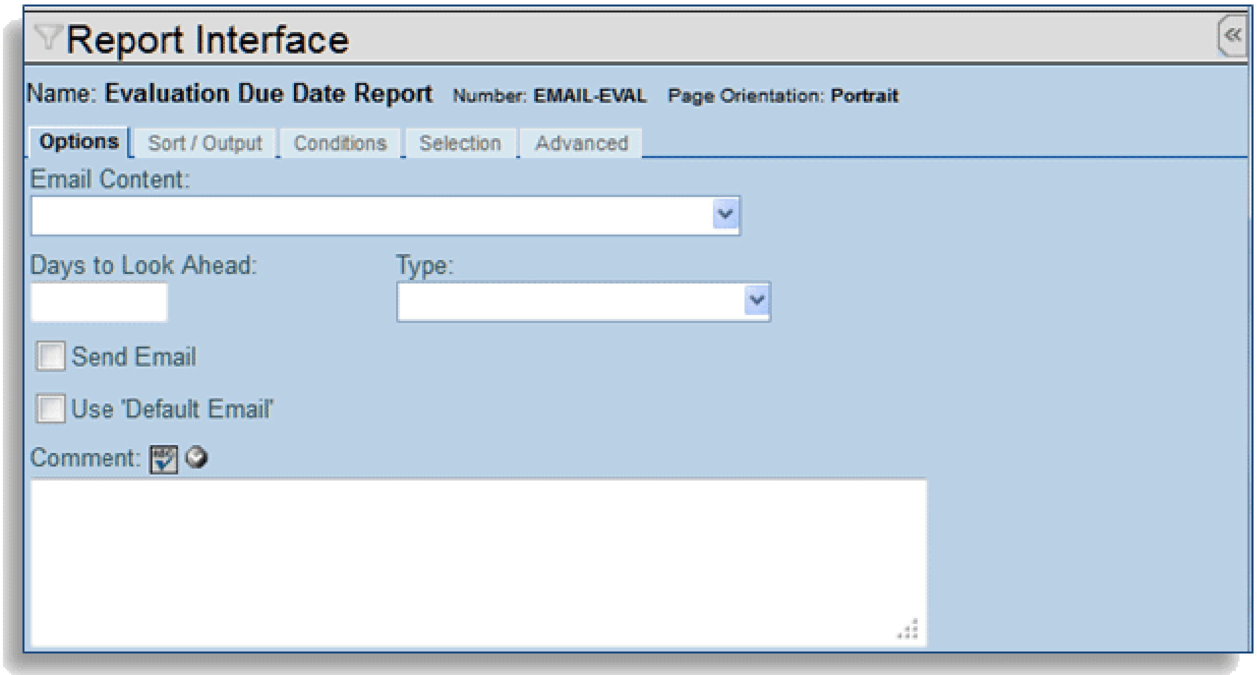
Student Number	Student Name	Birth Date	Next IEP Date	Placement	ELL Fluency Level	Primary Language	Primary Disability
41	**Aaron, Susan**	05/06/2004	04/05/2012				SPECIFIC LEARNING DISABILITY
	Father	Phillip Aaron	480-555-6767				
	1953 S Val Vista Dr, Mesa, AZ 85234						
	Mother	Kathleen Aaron	480-555-1214				
	1953 S Val Vista Dr, Mesa, AZ 85234						
120952	**Ackerman, Brian M.**	10/04/1995	12/01/2010				
	Mother	Diana Ackerman	480-555-0832				
	2010 N Lindsay Rd, Tempe, AZ 85662						
	Father	Eugene Ackerman	480-555-2593				
	2010 N Lindsay Rd, Tempe, AZ 85662						
962860	**Akins, Shawn E.**	02/17/1998	02/01/2010				MILD MENTAL RETARDATION
	Mother	Barbara Akins	602-555-4438	204			
	1522 N Gentry Ci, Tempe, AZ 85662						
	Father	Adam Akins	480-555-5495				
	1522 N Gentry Ci, Tempe, AZ 85662						
157131	**Babb, Mark M.**	10/16/1996	05/12/2010				SEVERE MENTAL RETARDATION
	Father	Walter Babb	480-555-9967				
	1533 W Garden St, Mesa, AZ 85612						
	Mother	Sarah Babb	480-555-2968				
	1533 W Garden St, Mesa, AZ 85612						
978780	**Facio, Wayne E.**	12/15/1999	02/16/2011				OTHER HEALTH IMPAIRED
	Father	Alan Facio	480-555-4629				
	137 N Miller St, Mesa, AZ 85620						
	Mother	Diana Magana	480-555-4629				
	137 N Miller St, Mesa, AZ 85620						
936105	**Galarza, Jerry M.**	07/09/1997	12/02/2010				SPECIFIC LEARNING DISABILITY
	Father	Aaron Galarza					
	No Address Given, Phoenix, AZ 85694						
	Mother	Cheryl Delanie	480-555-6510				
	835 S 35th Pl, Mesa, AZ 85604						

Printed by Cissy Horn at 12/10/2010 11:40 AM   Edupoint School District   Page 1 of 2

EMAIL-EVAL - EVALUATION DUE DATE REPORT

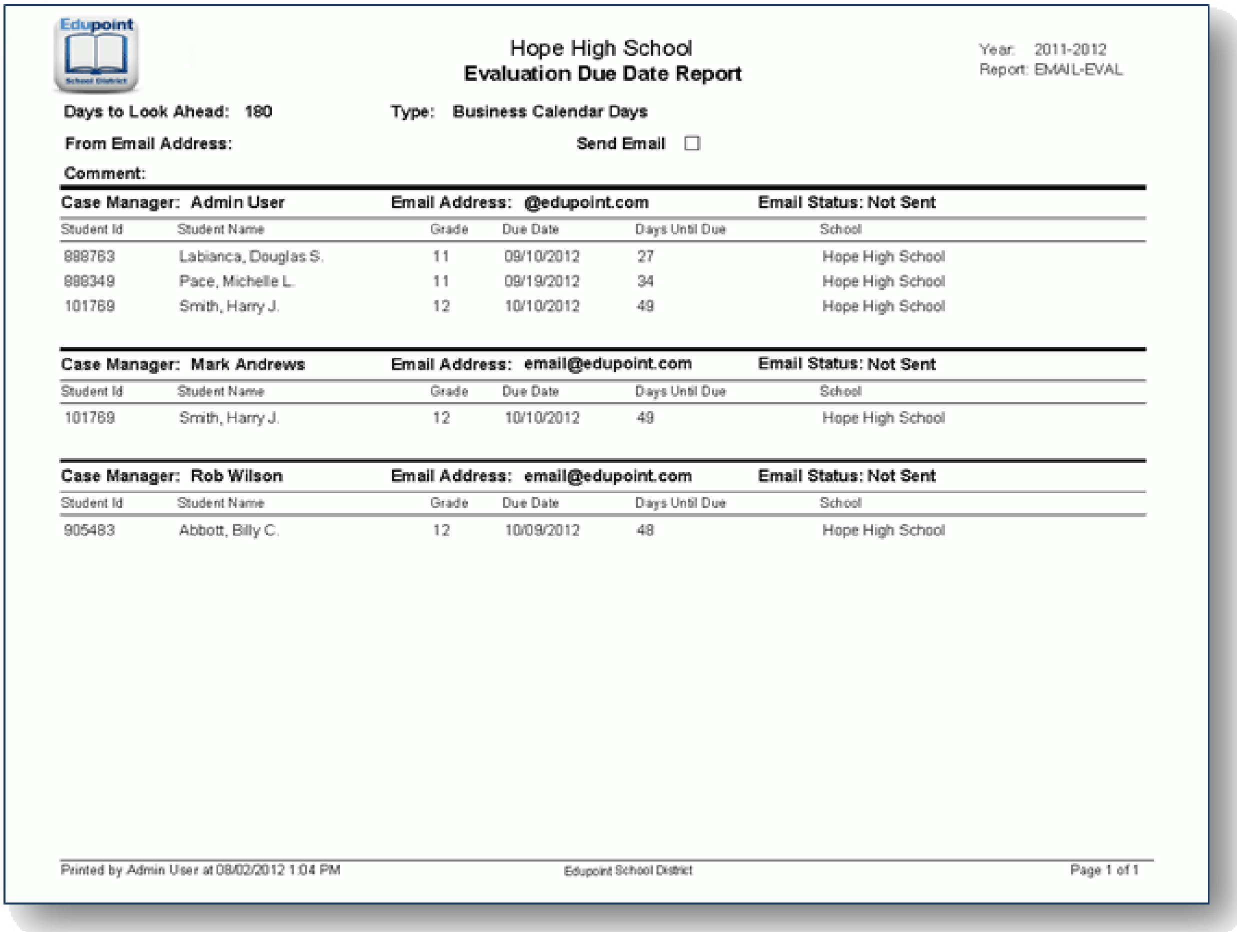
PAD Location: Synergy SE>Student>Reports

The Email Evaluation Due Date prints a list of all the Evaluation Due Dates in the user's Portfolio, Content of the report can be modified by selecting the number of days to look ahead. A comment can be added that displays in the body of the email.



REPORT OPTIONS:

Select from **Email Content:** , if no content is in current display.
Enter the number of **Days to Look Ahead**.
Select from **Type** whether to look ahead using **Calendar Days** or **Business Calendar Days.**
Enter a **Comment,** if desired.
Use to spellcheck.
Use for more space.



Hope High School
Evaluation Due Date Report

Year: 2011-2012
Report: EMAIL-EVAL

Days to Look Ahead: 180 **Type: Business Calendar Days**

From Email Address: **Send Email** ☐

Comment:

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

Student Id	Student Name	Grade	Due Date	Days Until Due	School
888763	Labianca, Douglas S.	11	09/10/2012	27	Hope High School
888349	Pace, Michelle L.	11	09/19/2012	34	Hope High School
101769	Smith, Harry J.	12	10/10/2012	49	Hope High School

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

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

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

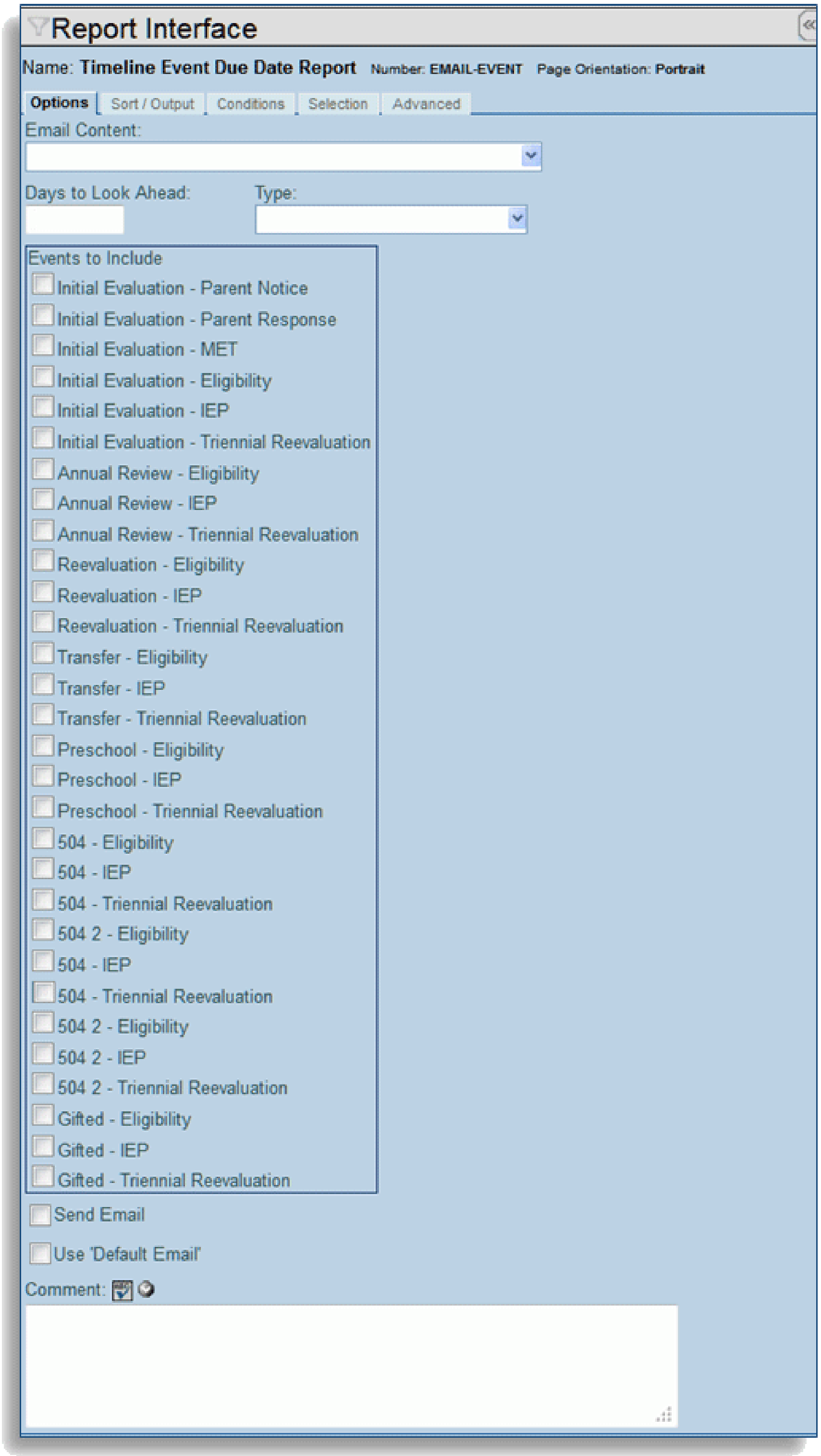
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	10/09/2012	48	Hope High School

Printed by Admin User at 08/02/2012 1:04 PM Edupoint School District Page 1 of 1

EMAIL-EVENT - Timeline Event Due Date Report

PAD Location: Synergy SE>Student>Reports

The Timeline Event Due Date Report emails specified users with a report of all timelines for the selected events. Content of the report can be modified by selecting the number of days to look ahead and selecting different events to include. A comment can be added that displays in the body of the email.



Report Options:

Select from **Email Content:** , if no content is in current display.

Enter the number of **Days to Look Ahead**.

Select from**Type** , whether to look ahead using **Calendar Days** or **Business Calendar Days.**

Events to Include:

Filter report by selecting Events to Include.

Hope High School
Timeline Event Due Date Report

Year: 2011-2012
Report: EMAIL-EVENT

Type: Business Calendar Days

From Email Address: **Send Email** ☐

Comment:

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

Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
888763	Labianca, Douglas S.	11	IEP	04/16/2012	-78	Hope High School
888763	Labianca, Douglas S.	11	Triennial Reevaluation	09/10/2012	27	Hope High School
888349	Pace, Michelle L.	11	Triennial Reevaluation	09/19/2012	34	Hope High School
101769	Smith, Harry J.	12	Triennial Reevaluation	10/10/2012	49	Hope High School

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

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

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

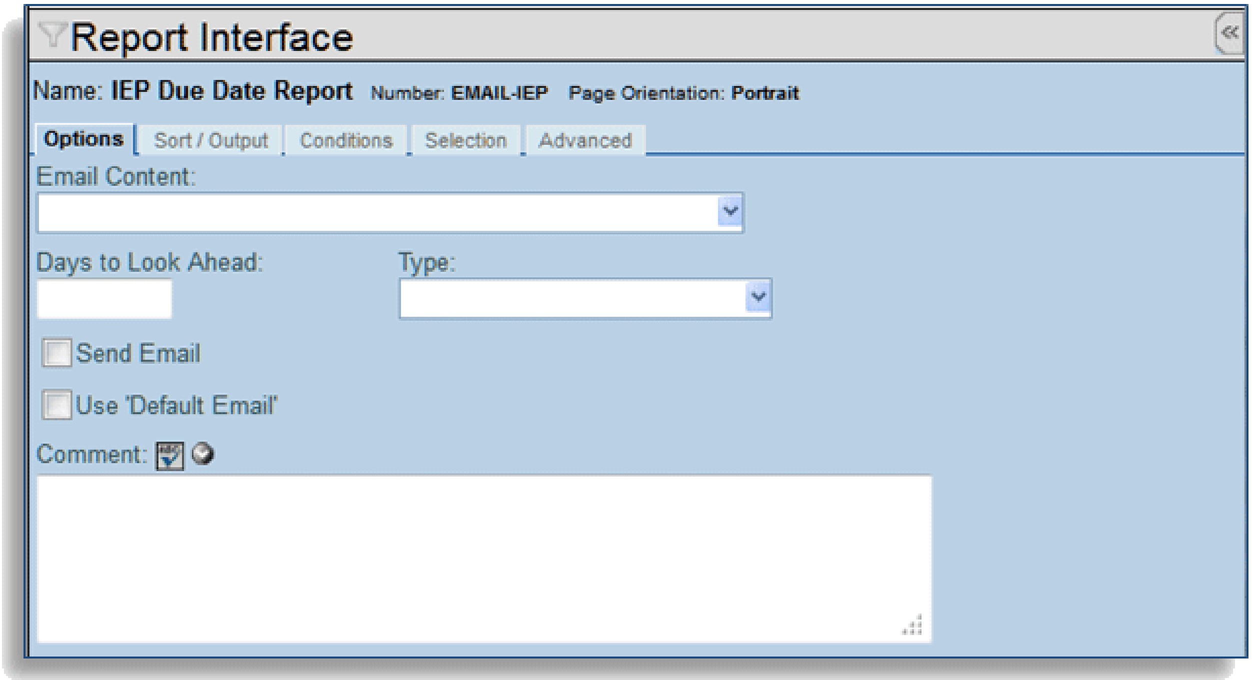
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	Triennial Reevaluation	10/09/2012	48	Hope High School
905483	Abbott, Billy C.	12	IEP	11/28/2012	84	Hope High School

Printed by Admin User at 08/02/2012 1:05 PM Edupoint School District Page 1 of 1

EMAIL-IEP - IEP DUE DATE REPORT

PAD Location: Synergy SE>Student>Reports

The IEP Due Date Report emails a report of the due dates of all IEP dates of students in the user's Portfolio. Content of the report can be modified by selecting the number of days to look ahead. A comment can be added that displays in the body of the email.



REPORT OPTIONS:

Select from **Email Content:** , if no content is in current display.
Enter the number of **Days to Look Ahead**.
Select from**Type** , whether to look ahead using **Calendar Days** or **Business Calendar Days.**
Enter a **Comment,** if desired.
Use to spellcheck.
Use for more space.

Edupoint School District

Hope High School
IEP Due Date Report

Year: 2011-2012
Report: EMAIL-IEP

Days to Look Ahead: 180 **Type:** Business Calendar Days

From Email Address: **Send Email** ☐

Comment:

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

Student Id	Student Name	Grade	Due Date	Days Until Due	School
888763	Labianca, Douglas S.	11	04/16/2012	-78	Hope High School

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

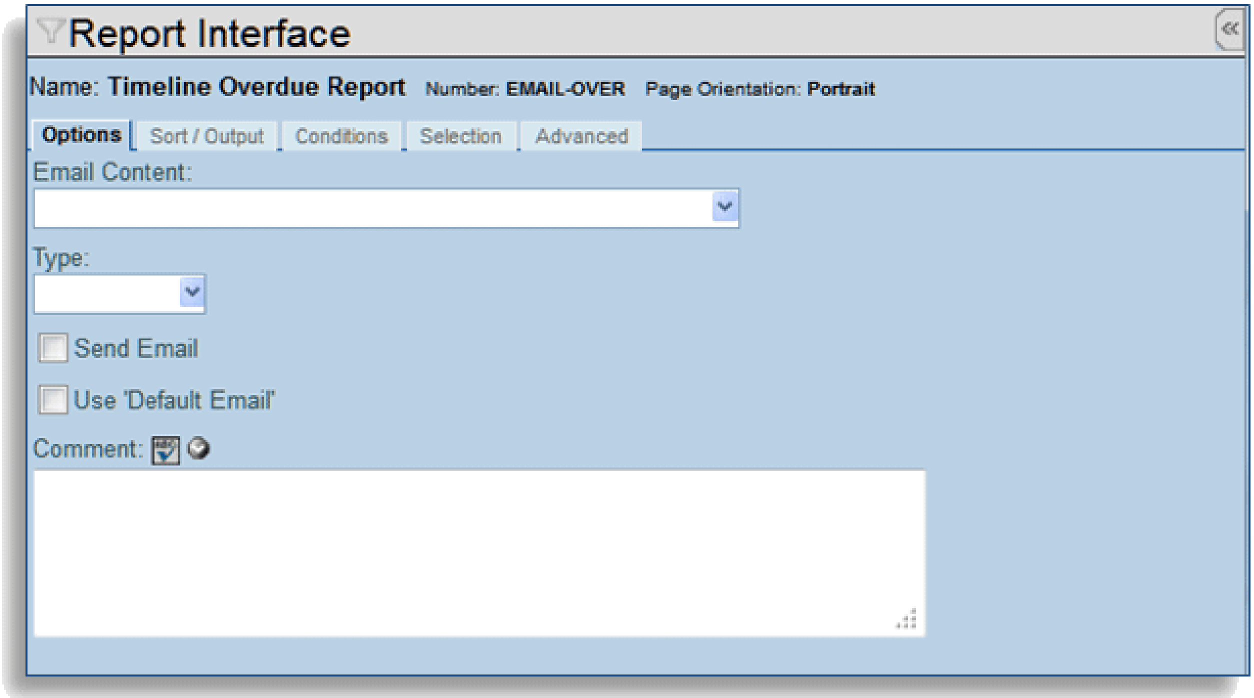
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	11/28/2012	84	Hope High School

Printed by Admin User at 08/02/2012 1:07 PM Edupoint School District Page 1 of 1

EMAIL-OVER - TIMELINE OVERDUE REPORT

PAD Location: Synergy SE>Student>Reports

The Timeline Overdue Report emails a report of all overdue documents associated with the user's Portfolio. Content of the report can be modified by selecting the number of days to look ahead. A comment can be added that displays in the body of the email.



REPORT OPTIONS:

Select from **Email Content:**, if no content is in current display.
Select from**Type**, whether to look ahead using **Calendar Days** or **Business Calendar Days.**
Enter a **Comment,** if desired.
Use to spellcheck.
Use for more space.

Edupoint School District

Hope High School
Timeline Overdue Report

Year: 2011-2012
Report: EMAIL-OVER

Type: Calendar Days

From Email Address: **Send Email** ☐

Comment:

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

Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School
888763	Labianca, Douglas S.	11	IEP	04/16/2012	101	Hope High School

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

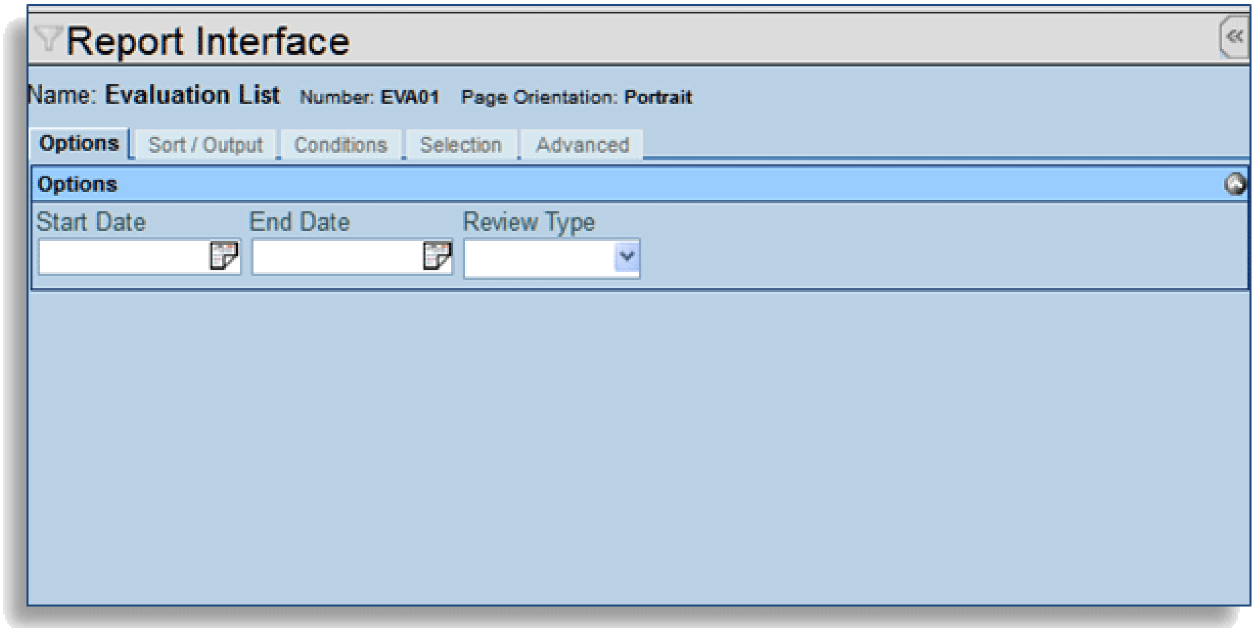
Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School
902870	(Abernethy, Anne E.)	10	MET	11/07/1999	4645	Hope High School
902870	(Abernethy, Anne E.)	10	IEP	11/17/1999	4635	Hope High School

Printed by Admin User at 07/26/2012 10:44 AM Edupoint School District Page 1 of 1

EVA01 - EVALUATION LIST

PAD Location: Synergy SE>Student>Reports

The Evaluation List report prints a list of all students with the Review Type selected in the report options. The report includes Student Name, ID, and Date Due of the Review or Triennial.



REPORT OPTIONS:

Enter a **Start** and **End Date** or click and select dates, to filter the period of time for the report to cover.
Select from the **Review Type** to filter the records to display. The choices are **All, Annual/Initial**, or **Triennial.**

Hope High School
Evaluation List

Year: **2011-2012**
Report: **EVA01**

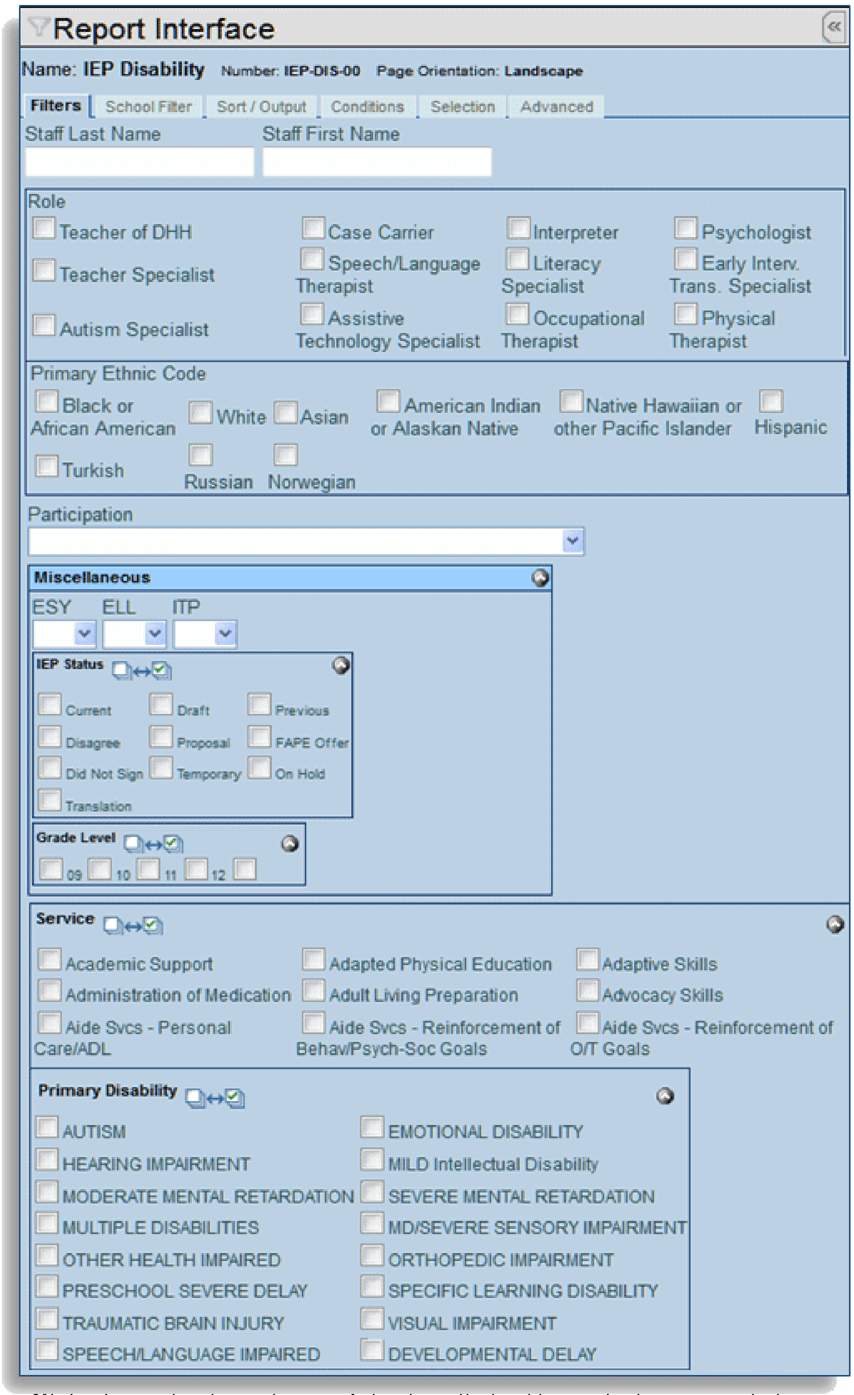
ID	Student Name	Date Finished	Date Due	Review Type	DIS Services	Mental Health?
123456	Aaron, Ian		11/05/12	Annual/Initial	No	No
123456	Aaron, Ian		11/05/12	Annual/Initial	No	No
905783	Abbott, Billy		11/28/12	Annual& Trienial	No	No
123456	Ackerman, Brian C.		09/05/14	Annual& Trienial	No	No
123456	Akins, Shawn		03/0512	Annual& Trienial	No	No
123456	Babb, Mark B.		02/23/14	Annual/Initial	No	No
123456	Facio, Wayne D.		12/12/12	Annual& Trienial	No	No
123456	Galaza, Jerry G.		11/0512	Annual& Trienial	No	No
123456	Laffoon, Craig E.		03/15/14	Annual& Trienial	No	No
123456	Martinez, Henry E.		01/11/14	Annual& Trienial	No	No

Printed by Admin User at 03/21/2012 2:00PM Edupoint School District Page 1 of 1

IEP-DIS-00 - IEP DISABILITY

PAD Location: Synergy SE>Student>Reports

The IEP Disability report prints a list of all students that includes selected details of their current, previous, and draft IEPs. The list is sorted by Case Carrier. The report includes Student Name, ID, Grade, IEP and Triennial dates and School. Disability and Services Provided are displayed,also.



REPORT OPTIONS:

This report may be filtered by **Role, Primary Ethnic Code, Participation, IEP Status, Grade Level, Service,** and or **Primary Disability.**

Note: Example above does **not display all checkbox selections provided.*

Hope High School

IEP Disability

Year: 2011-2012
Report: IEP-DIS-00

Student Name: Aaron, Ian **ID:** 129442 **Grad** 04 **Next IEP Date:** 11/05/2012 **Triennial Date:** 01/23/2015

Case Carrier: Wilson, Rob **School:** Adams Elementary **Home School:** Adams Elementary

IEP Status: Current **Primary Disability:** DEVELOPMENTAL DELAY **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Anger Management	10/31/2011	10/29/2012	Special			every month	240 min = 4.00 hrs

IEP Status: Current **Primary Disability:** DEVELOPMENTAL DELAY **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Anger Management	10/31/2011	10/30/2012	Special			every month	240 min = 4.00 hrs

IEP Status: Draft **Primary Disability:** DEVELOPMENTAL DELAY **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Aide Svcs - Personal Care/ADL	10/31/2011	10/30/2012				per week	60 min = 1.00 hrs
Expressive/Receptive Language (SLI)	10/31/2011	10/29/2012	Special			every month	240 min = 4.00 hrs
Academic Support	03/16/2012	03/15/2013	General			per day	60 min = 1.00 hrs

Student Name: Ackerman, Brian M. **ID:** 120952 **Grad** 09 **Next IEP Date:** 01/17/2013 **Triennial Date:** 04/28/2014

Case Carrier: User, Admin **School:** Truman Middle School **Home School:** Truman Middle School

IEP Status: Current **Primary Disability:** SPECIFIC LEARNING DISABILITY **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Basic Reading Skills	02/01/2012	01/17/2013	Special			every month	60 min = 1.00 hrs

IEP Status: Draft **Primary Disability:** SPECIFIC LEARNING DISABILITY **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Basic Reading Skills			Special			every month	60 min = 1.00 hrs

Student Name: Akins, Shawn E. **ID:** 962860 **Grad** 06 **Next IEP Date:** 01/30/2012 **Triennial Date:** 03/07/2012

Case Carrier: Horn, Cissy **School:** Washington Elementary **Home School:** Washington Elementary

IEP Status: Current **Primary Disability:** MILD Intellectual Disability **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Basic Reading Skills	01/31/2011	01/30/2012	General			per week	180 min = 3.00 hrs
Artic/Language (SLI)	01/31/2011	01/30/2012	General			per week	60 min = 1.00 hrs
Communication Skills	01/31/2011	01/30/2012	General			per week	60 min = 1.00 hrs
Cognitive Skills	01/31/2011	01/30/2012	General			per week	600 min = 10.00 hrs
Cognitive Skills	01/31/2011	01/30/2012	Special			per week	600 min = 10.00 hrs

IEP Status: Draft **Primary Disability:** MILD Intellectual Disability **Extended School Year:** **ELL:** **ITP** **Accommodation Test:**

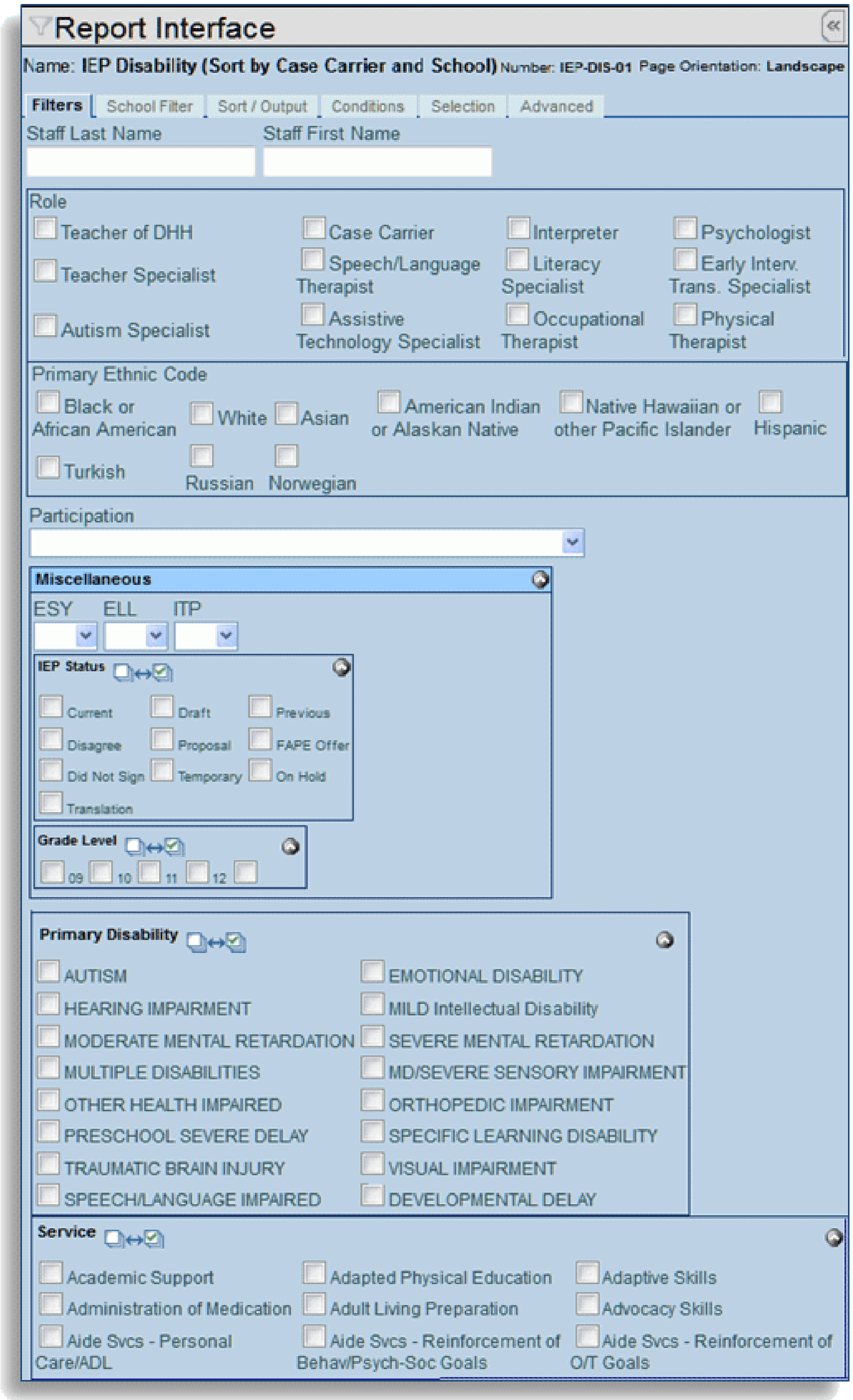
Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session

Printed by Admin User at 03/21/2012 2:03 PM Edupoint School District Page 1 of 2

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

PAD Location: Synergy SE>Student>Reports

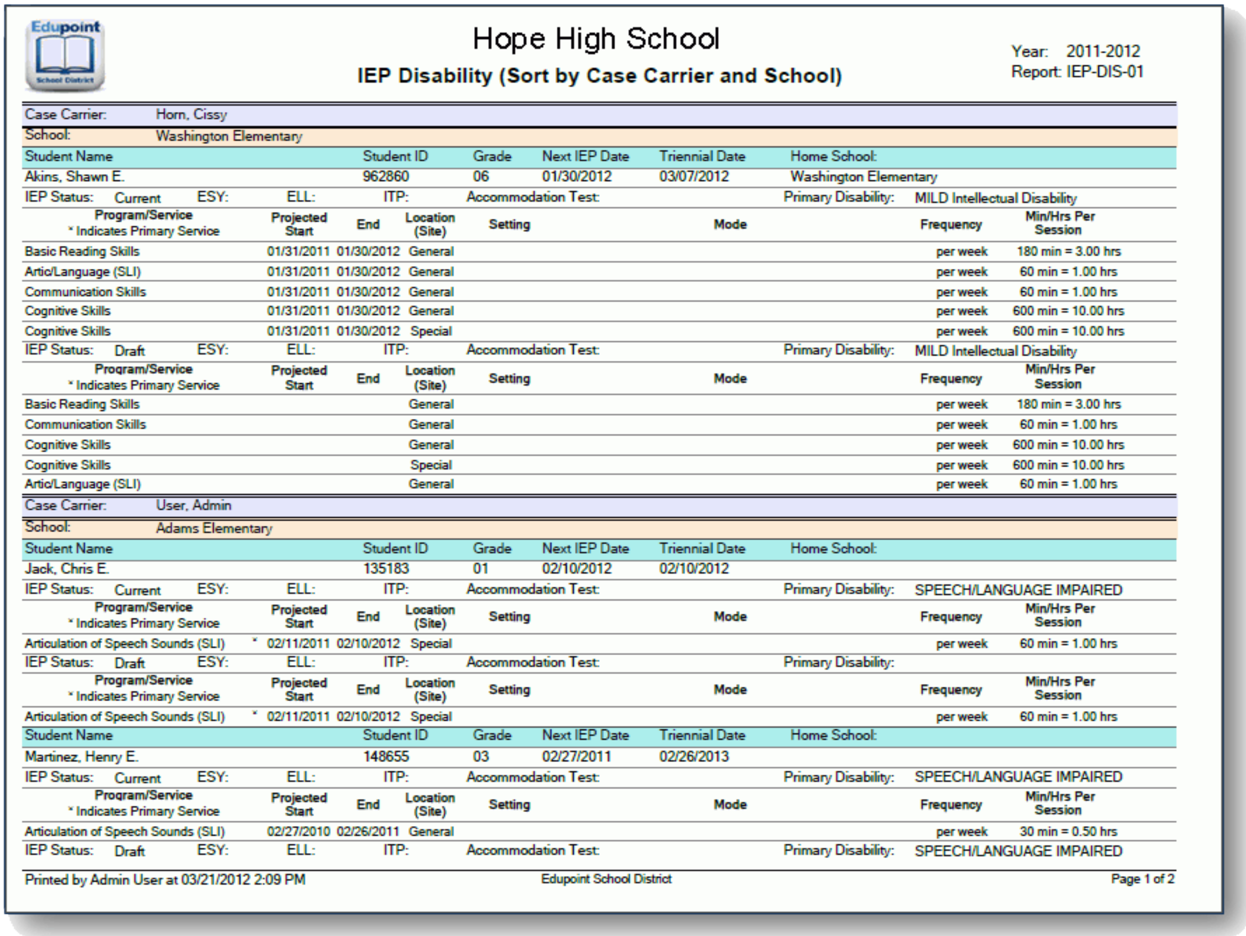
The IEP Disability report prints the same information as the IEP-DIS-00 report but displays the information sorted by Case Carrier then by School.



*Note: Example above does **not** display all checkbox selections provided.

Report Options:

This report may be filtered by **Role, Primary Ethnic Code, Participation, IEP Status, Grade Level, Service,** and or **Primary Disability.**



Hope High School

IEP Disability (Sort by Case Carrier and School)

Year: 2011-2012
Report: IEP-DIS-01

Case Carrier: Horn, Cissy
School: Washington Elementary

Student Name	Student ID	Grade	Next IEP Date	Triennial Date	Home School:
Akins, Shawn E.	962860	06	01/30/2012	03/07/2012	Washington Elementary

IEP Status: Current ESY: ELL: ITP: Accommodation Test: Primary Disability: MILD Intellectual Disability

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Basic Reading Skills	01/31/2011	01/30/2012	General			per week	180 min = 3.00 hrs
Artic/Language (SLI)	01/31/2011	01/30/2012	General			per week	60 min = 1.00 hrs
Communication Skills	01/31/2011	01/30/2012	General			per week	60 min = 1.00 hrs
Cognitive Skills	01/31/2011	01/30/2012	General			per week	600 min = 10.00 hrs
Cognitive Skills	01/31/2011	01/30/2012	Special			per week	600 min = 10.00 hrs

IEP Status: Draft ESY: ELL: ITP: Accommodation Test: Primary Disability: MILD Intellectual Disability

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Basic Reading Skills			General			per week	180 min = 3.00 hrs
Communication Skills			General			per week	60 min = 1.00 hrs
Cognitive Skills			General			per week	600 min = 10.00 hrs
Cognitive Skills			Special			per week	600 min = 10.00 hrs
Artic/Language (SLI)			General			per week	60 min = 1.00 hrs

Case Carrier: User, Admin
School: Adams Elementary

Student Name	Student ID	Grade	Next IEP Date	Triennial Date	Home School:
Jack, Chris E.	135183	01	02/10/2012	02/10/2012	

IEP Status: Current ESY: ELL: ITP: Accommodation Test: Primary Disability: SPEECH/LANGUAGE IMPAIRED

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Articulation of Speech Sounds (SLI) *	02/11/2011	02/10/2012	Special			per week	60 min = 1.00 hrs

IEP Status: Draft ESY: ELL: ITP: Accommodation Test: Primary Disability:

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Articulation of Speech Sounds (SLI) *	02/11/2011	02/10/2012	Special			per week	60 min = 1.00 hrs

Student Name	Student ID	Grade	Next IEP Date	Triennial Date	Home School:
Martinez, Henry E.	148655	03	02/27/2011	02/26/2013	

IEP Status: Current ESY: ELL: ITP: Accommodation Test: Primary Disability: SPEECH/LANGUAGE IMPAIRED

Program/Service * Indicates Primary Service	Projected Start	End	Location (Site)	Setting	Mode	Frequency	Min/Hrs Per Session
Articulation of Speech Sounds (SLI)	02/27/2010	02/26/2011	General			per week	30 min = 0.50 hrs

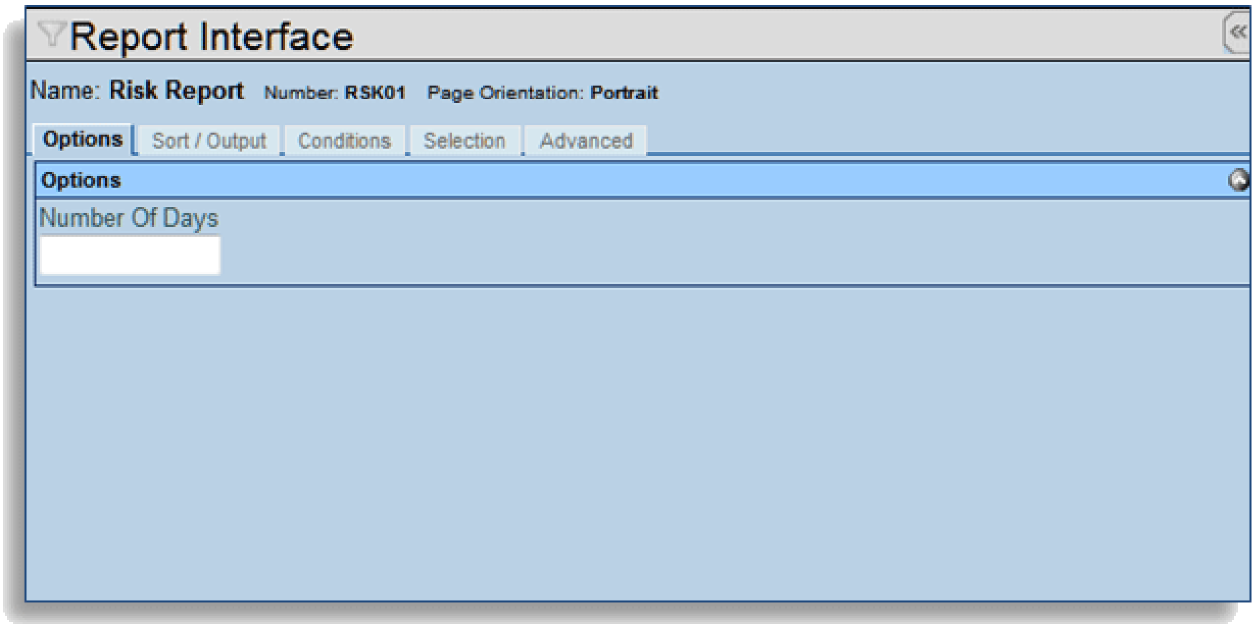
IEP Status: Draft ESY: ELL: ITP: Accommodation Test: Primary Disability: SPEECH/LANGUAGE IMPAIRED

Printed by Admin User at 03/21/2012 2:09 PM Edupoint School District Page 1 of 2

RSK01 - RISK REPORT

PAD Location: Synergy SE>Student>Reports

The Risk01 Report prints a list of special education students, sorted by School and then by Case Carrier, and based on filtering options selected. It includes Student Name, Date of Birth, Student ID Number and Primary Disability. It includes the Annual and Triennial Review Due Dates with Days Remaining.



REPORT OPTIONS:

Enter the **Number of Days** in the future for the report to collect information to display.

Hope High School

Risk Report

Year: 2011-2012
Report: RSK01

School: Adams Elementary

Case Carrier: User, Admin

Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Jack, Chris E.	08/18/2005	135183	SPEECH/LANGUAGE IMPAIRED	User, Admin	unspecified	02/10/2012	-40	02/10/2012	-40
Martinez, Henry E.	11/28/2003	148655	SPEECH/LANGUAGE IMPAIRED	User, Admin	unspecified	02/27/2011	-388	02/26/2013	341

Case Carrier: Wilson, Rob

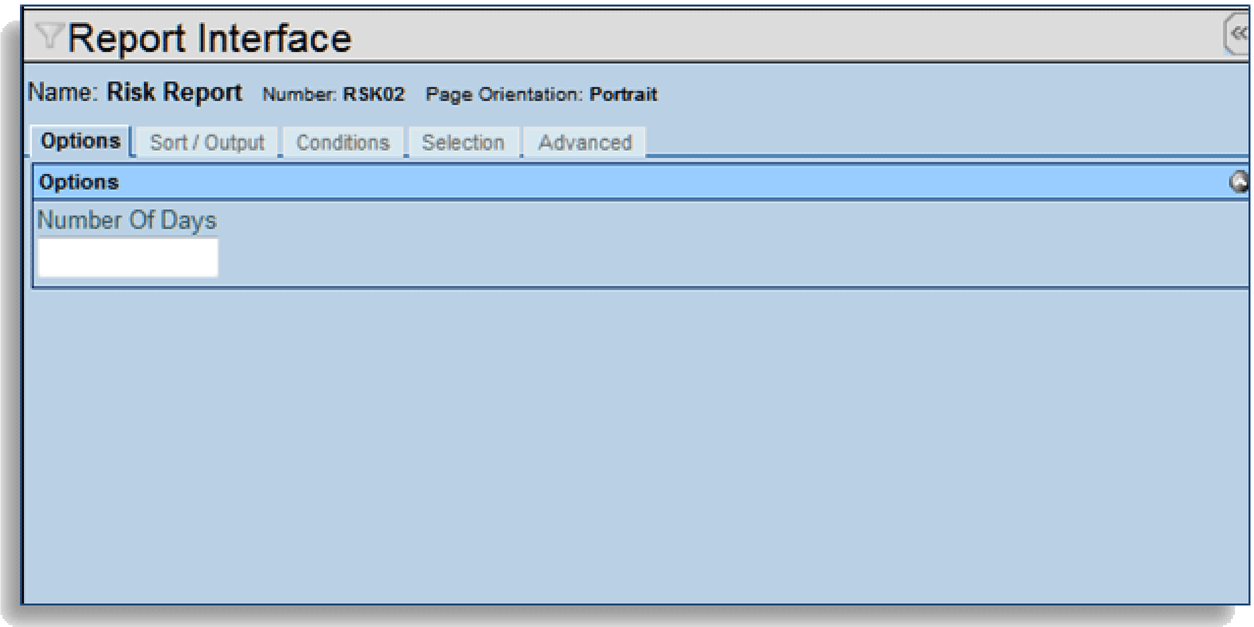
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Aaron, Ian	04/12/2002	129442	DEVELOPMENTAL DELAY	Wilson, Rob	480-555-1234	11/05/2012	228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

Printed by Admin User at 03/21/2012 2:14 PM Edupoint School District Page 1 of 8

RSK02 - Risk Report

PAD Location: Synergy SE>Student>Reports

The Risk02 Report prints a list of special education students, sorted by Case Carrier and then by School, and based on filtering options selected. It includes Student Name, Date of Birth, Student ID Number and Primary Disability. It includes the Annual and Triennial Review Due Dates with Days Remaining.



Report Options:

Enter the **Number of Days** in the future for the report to collect information to display.

Edupoint School District

Hope High School

Risk Report

Year: 2011-2012
Report: RSK02

Case Carrier: User, Admin

School: Hope High School

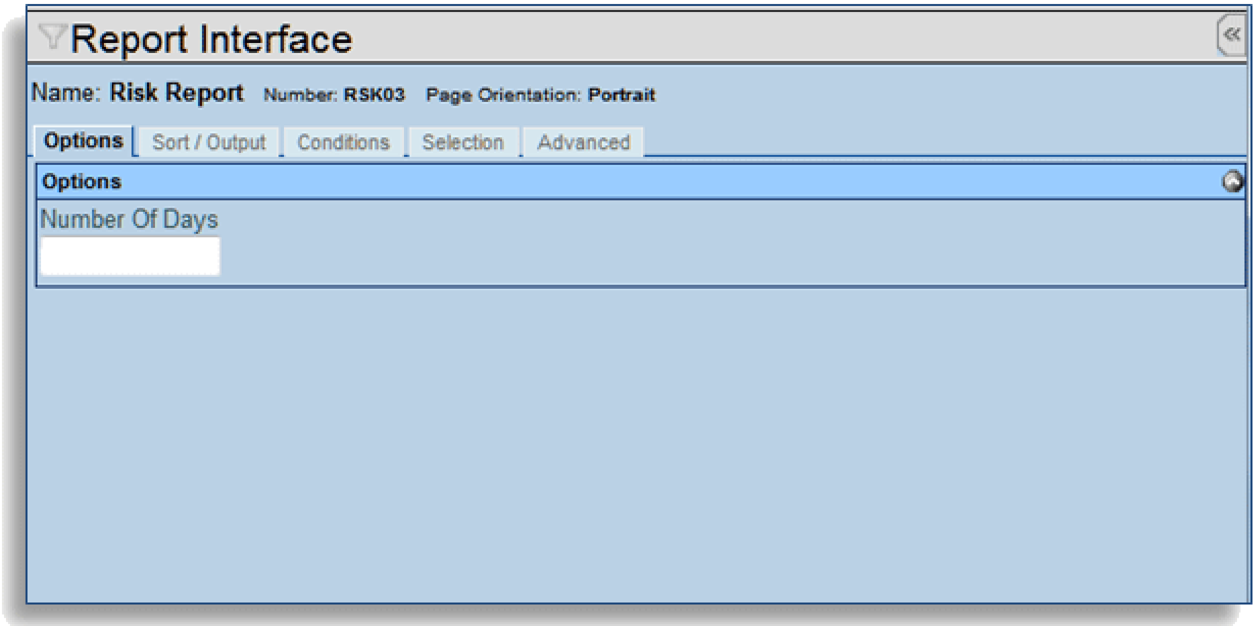
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified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

Printed by Admin User at 07/26/2012 9:24 AM Edupoint School District Page 1 of 1

RSK03 - RISK REPORT

PAD Location: Synergy SE>Student>Reports

The Risk03 Report prints a list of special education students, sorted by Triennial Remaining Days, and based on filtering options selected. It includes Student Name, Date of Birth, Student ID Number and Primary Disability. It includes the Annual and Triennial Review Due Dates with Days



Remaining.

REPORT OPTIONS:

Enter the **Number of Days** in the future for the report to collect information to display.

Hope High School

Risk Report

Year: 2011-2012
Report: RSK03

Triennial Remaining Days: 508

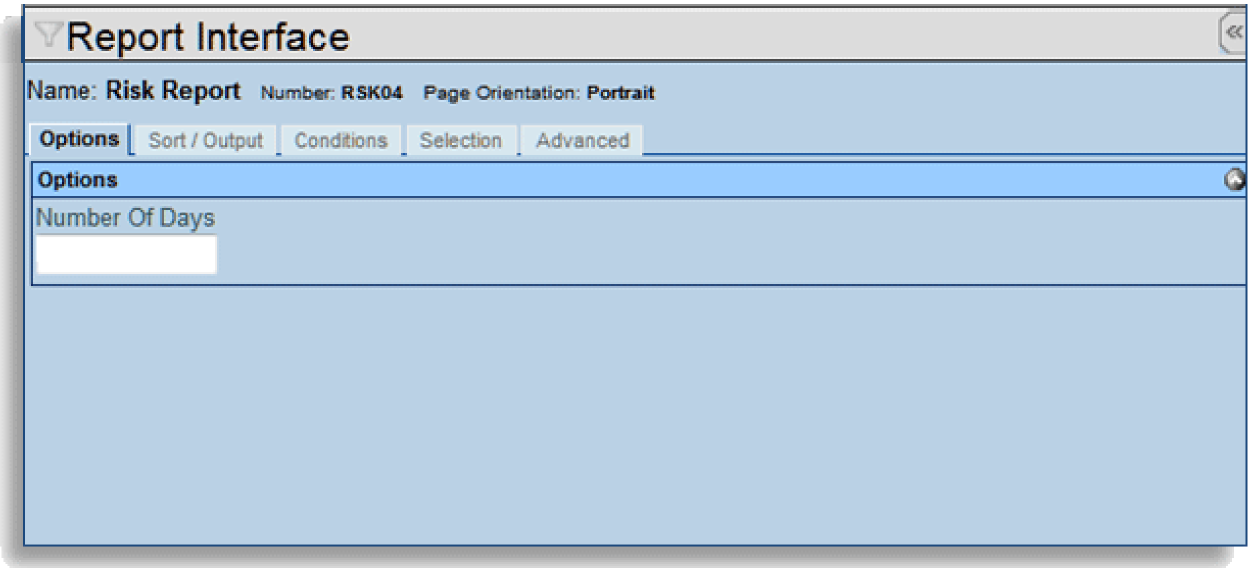
				Case Carrier		Annual Review		Triennial Review		
Student Name	**Date of Birth**	**Student ID Number**	Primary Disability	**Name**	**Phone #**	**Due Date**	**Days Remaining**	**Due Date**	**Days Remaining**	**School Name**
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified	04/18/2012	-101	12/17/2013	508	Hope High School

Printed by Admin User at 07/28/2012 9:25 AM   Edupoint School District   Page 1 of 1

RSK04 - RISK REPORT

PAD Location: Synergy SE>Student>Reports

The Risk04 Report prints a list of special education students, sorted by Annual Remaining Days, and based on filtering options selected. It includes Student Name, Date of Birth, Student ID Number and Primary Disability. It includes the Annual and Triennial Review Due Dates with Days Remaining.



REPORT OPTIONS:

Enter the **Number of Days** in the future for the report to collect information to display.

Hope High School
Risk Report

Year: 2011-2012
Report: RSK04

Annual Remaining Days: -101

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

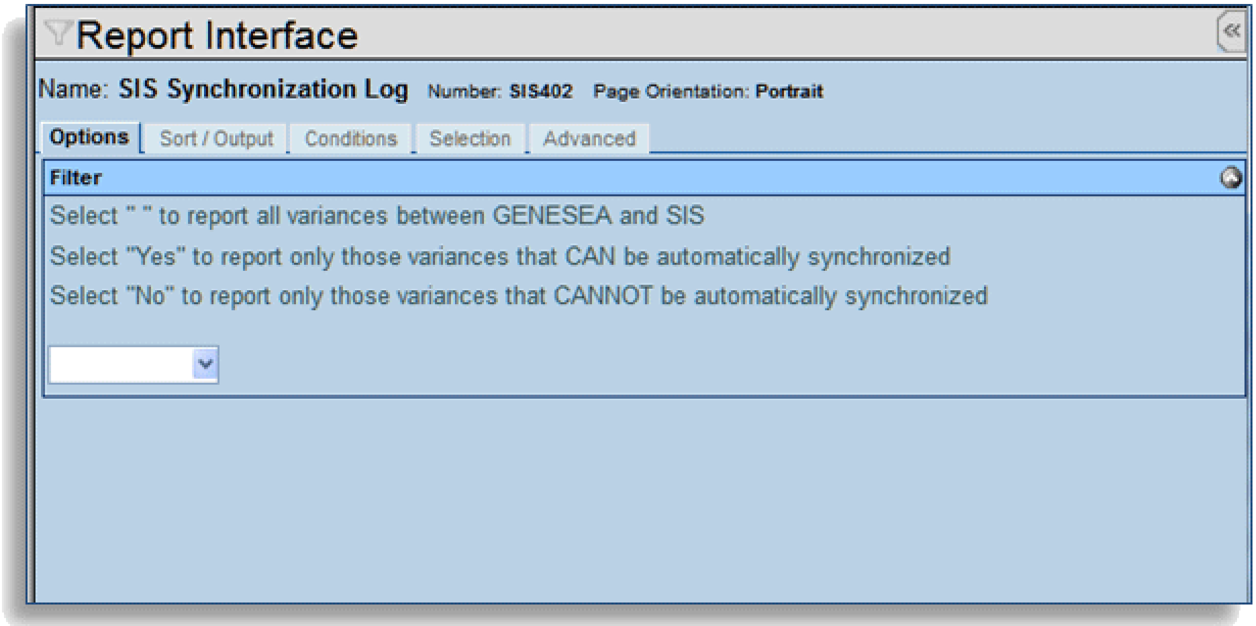
Printed by Admin User at 07/29/2012 9:26 AM Edupoint School District Page 1 of 1

SIS402 - SIS Synchronization Log

PAD Location: Synergy SE>Student>Reports

The SIS Synchronization Log prints a log report of all the variances found between Synergy SE and SIS.

Report Options:



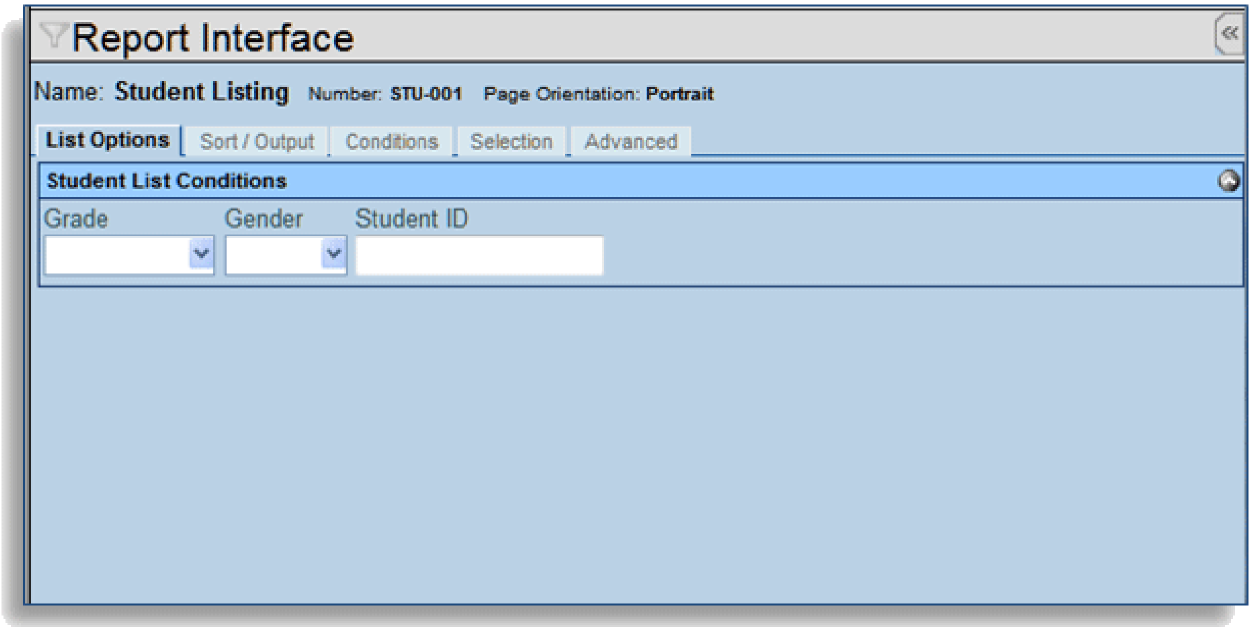
Filter:

Click the drop-down and
Select **blank** to report all variances between GENESEA (Synergy SE) and SIS.
OR
Select **Yes** to report only those variances that *can* be automatically synchronized.
OR
Select **No** to report only those variances that *cannot* be automatically synchronized.

STU-001 - Student Listing

PAD Location: Synergy SE>Student>Reports

The Student Listing report prints a list of all students in Synergy SE. The report includes Student



Name, Gender, Grade, Phone number and Address.

Report Options:

Student List Conditions:

Filter by **Grade**, **Gender** or a **Student ID.**

Edupoint School District

Hope High School
Student Listing

Year: 2011-2012
Report: STU-001

Student Name	Gender	Grade	Phone	Address
Abbott, Billy C.	Male	12	###-###-####	195888 S Val Vista Dr Mesa AZ 85234
Abbott, Billy C.	Male	12	###-###-####	195888 S Val Vista Dr Mesa AZ 85234
Abbott, Billy C.	Male	12	###-###-####	195888 S Val Vista Dr Mesa AZ 85234
Abbott, Billy C.	Male	12	###-###-####	195888 S Val Vista Dr Mesa AZ 85234
Labianca, Douglas S.	Male	11	480-555-1234	3453 E Decatur St Tempe AZ 85662

Total Students: 5

Printed by Admin User at 07/26/2012 9:28 AM Edupoint School District Page 1 of 1

Job Queue Viewer

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

Access the Job Queue Viewer Screen

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

Figure 8-7 Synergy SE 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.

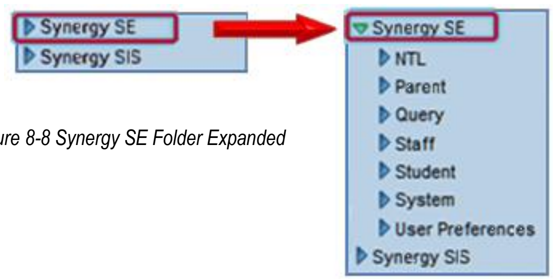


Figure 8-8 Synergy SE Folder Expanded

3. Under the Synergy SE folder, click on the name **System** or pointing right next to it.

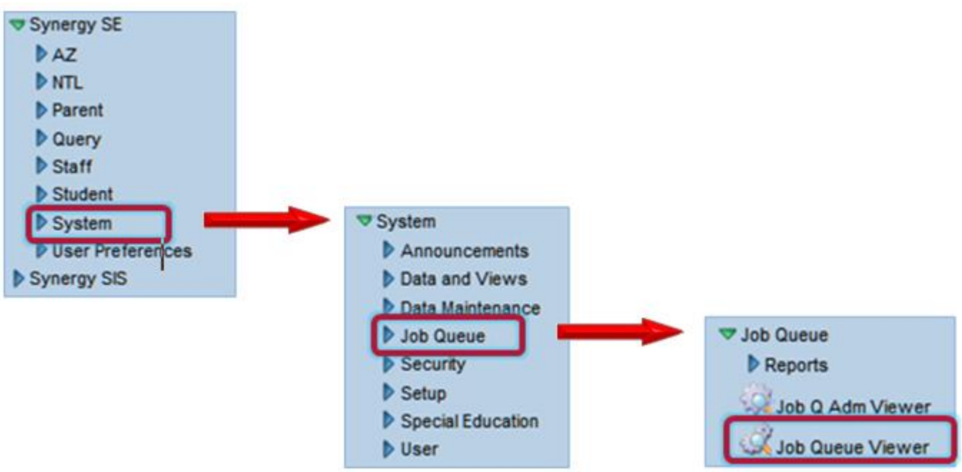


Figure 8-9 Synergy SE System and Job Queue Folders Expanded

4. Under the System folder, click on the name **Job Queue** or pointing right next to it.
5. Click on **Job Queue Viewer**.

To filter jobs:

1. Type the **Job ID** to view similar jobs or reports – a Job ID includes the **Report ID** such as CAS01 or **Job Name** such as SCHHISTEXTR which is a School Enrollment History Extract (optional)
2. Type the **Begin Date** (MM/DD/YY) or click and select date.
3. Type the **End Date** (MM/DD/YY) or click and select date.

4. Click **State**. Choices are **Complete, Canceling, Complete, Deleted, Error, Hold, In Progress**, and **Waiting**
5. Type the **Server Name**, if known.(optional)
6. Check **Show Recurring** to look for jobs set to run **Daily, Weekly**, or **Monthly** (optional).
7. Click **Filter**.The information displays on Jobs in Queue section.
8. Click **Result** to display a report.
9. Click **Result** to display an image.

To display the job details

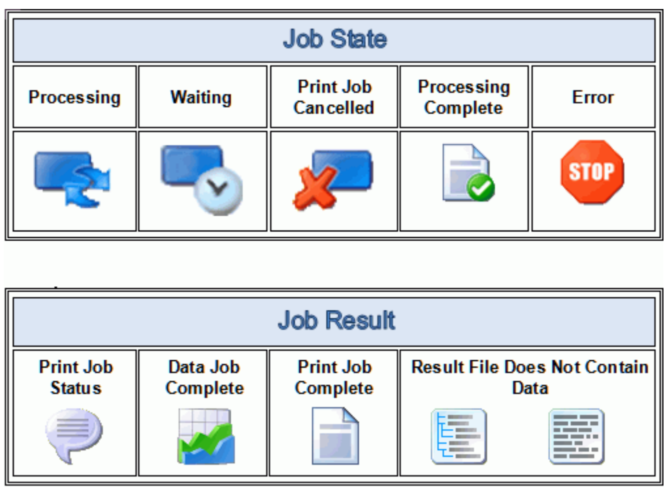
1. Click the line number of report to highlight.
2. Click Show Detail.The information includes Details, Recurring Pattern, Results, and System Info.
3. Click Hide Detail to hide the detail information.

To delete a job:

1. Check on line of the job to delete. More than one selection is permitted.
2. Click Save.

To mass delete jobs:

1. Click **State Selection**. Choices are All, Complete, Error, Hold, In Progress, and Waiting
2. Click Delete Jobs.



INDEX

INDEX OF SCREENS