Oregon Special Education User Guide

Synergy®
Education Platform

Edupoint®

About This Manual

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

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

Conventions Used in This Manual

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

Notes provide additional information about the subject.

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

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

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

Before You Begin

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

Software and Document History

Document Version	Release Date	Software Release	Description
4.0	May 2017	2018	Updates: • Updated *Translation of Documents* • Updated *Introduction to the Portfolio Screen* • Updated *Accessing and Editing Student Data and Information* • Added *Progress Reports*

Document Version	Release Date	Software Release	Description
5.0	Dec 2018	2018.01	Updates: • Added *APM-1 - Automatic Process Moves Report* • Moved the *Managing SE Documents* chapter to the *Oregon Special Education Document Guide* • Added **Exited** field to *Admin Progress Report*
6.0	Jun 2018	2019	Updates: • Changed document title • Added *Modifying Student Disability and Special Education Dates* • Added *Viewing "No Showed" in Synergy SE* to *Accessing and Editing Student Data and Information* • Added 504 review date and 504 reevaluation date to *CLS-LST-01: Portfolio List*

7.0	Dec 2018	2019.01	Updates:
			• Updated Overview for Admin Student Portfolio screen
			• Moved *Assigning Teams to Students* to the Administrator Guide
			• Updated Overview and Manually Moving a Student to Another Process for dual process
			• Add 504 Plan button to **504 Docs** tab in Overview
			• Updated the following reports for specifying Team/Staff Roles to include in the report:
			  • EMAIL-EVAL– Evaluation Due Date Report
			  • EMAIL-EVENT – Timeline Event Due Date Report
			  • EMAIL-IEP – IEP Due Date Report
			  • EMAIL-OVER – Timeline Overdue Report
			• Updated Team Student Team List for additional functionality on how Case Manager roles are assigned
			• Added Snapshot Views and Synergy Docking Panel
			• Added 504 Docs Tab

8.0	Jun 2019	2020	Added SE Portfolio screen in Overview and updated the guide to replace the Portfolio screen with the SE Portfolio screen
9.0	Mar 2020	2021	Updated **Sort** options and added **Case Manager** in Admin Progress Report

Table of Contents

Chapter 1: Synergy SE Overview

Synergy SE

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

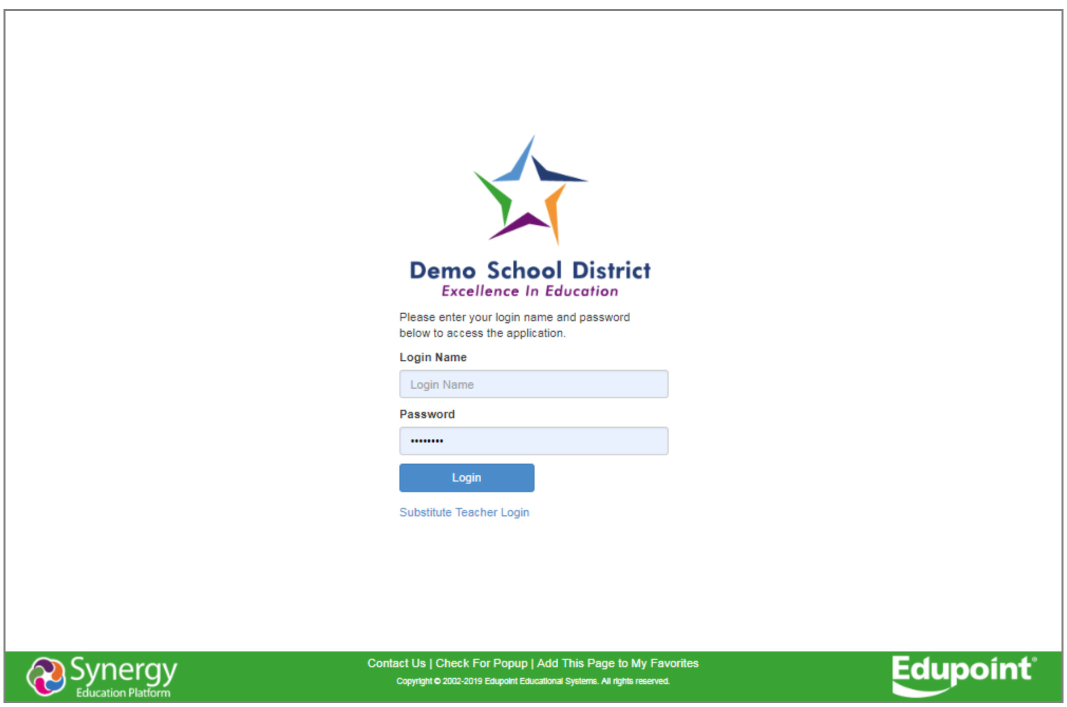
The software is accessed using a web browser like Internet Explorer, Chrome, or FireFox. Each district chooses whether to make Synergy SE available on the internet or only from the internal district network.

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

> See the *Oregon Special Education Document Guide* for additional information on specific Synergy SE Ad Hoc and Process documents.

Launching Synergy SE

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

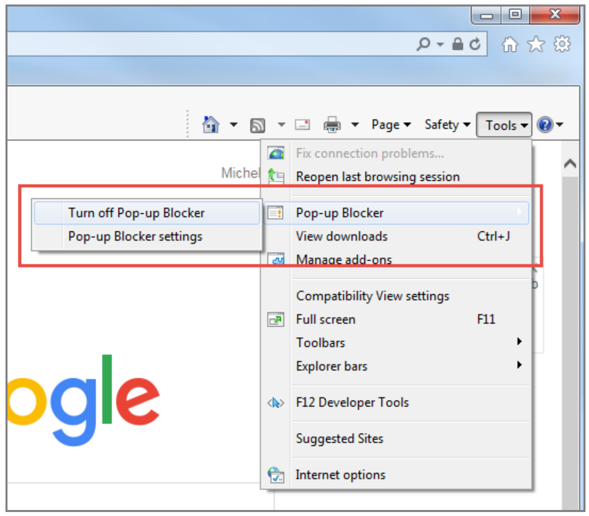


Login Screen

Disable Pop-Up Blockers

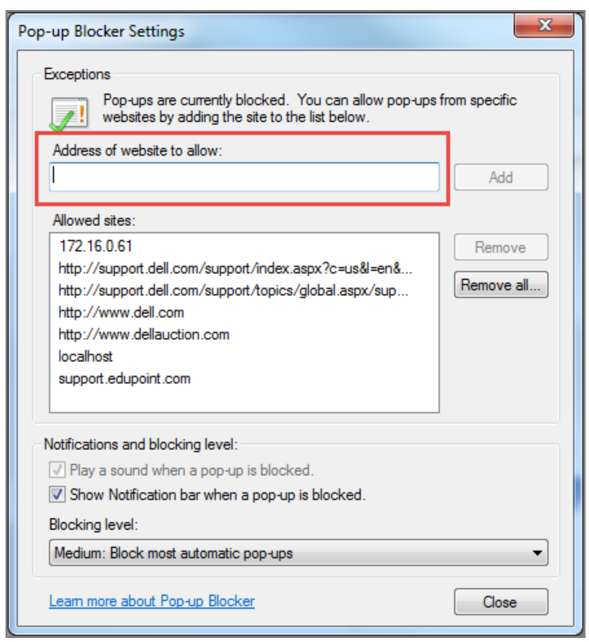
The Synergy SE software does not support the use of Pop-Up Blockers in browsers. Disable any Pop-Up Blockers before logging into the Synergy SE software.

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



Internet Explorer – Tools Menu

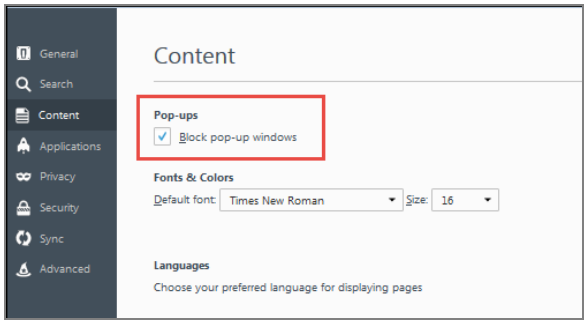
- Select **Tools > Pop-up Blocker > Pop-up Blocker Settings** and add the URL address for Synergy SE in **Address of website to allow**.



Internet Explorer Pop-up Blocker Settings

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

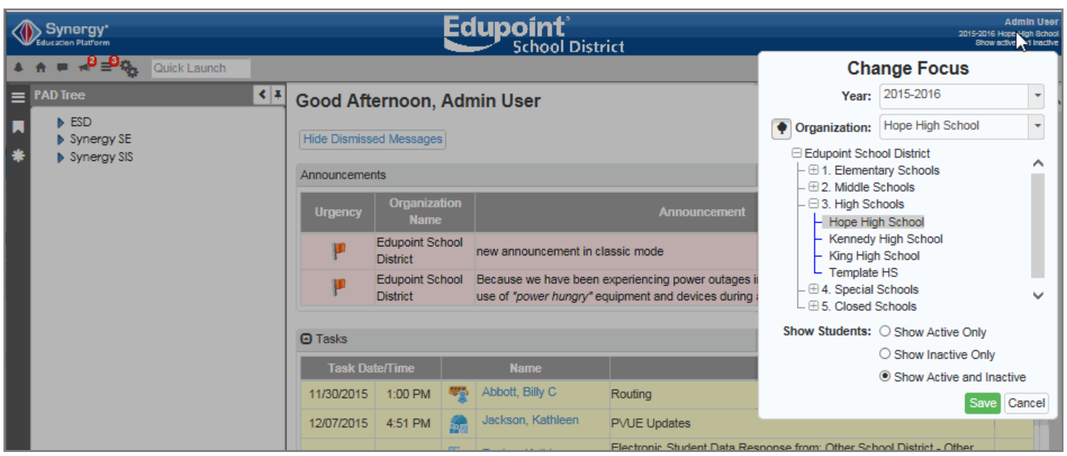
- FireFox:
    1. Click and select **Options**.
    2. Select **Content**.
    3. Select **Block pop-up windows**.



FireFox Content Screen

Changing the Focus

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



Synergy SE Home Screen, Change Focus

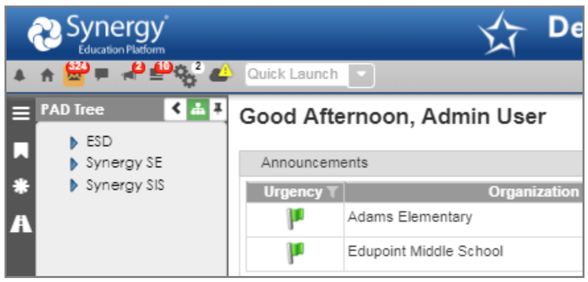
1. Select the focus area. The Change Focus windows displays.
    - Select a different school **Year**.
    - Select the **Organization** from the drop-down or in the tree.
    - Select a radio button in **Show Students** to change whether **Active** or **Inactive** students are displayed.
2. Click **Save**.

Navigating in Synergy SE

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

Title Bar Icons

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

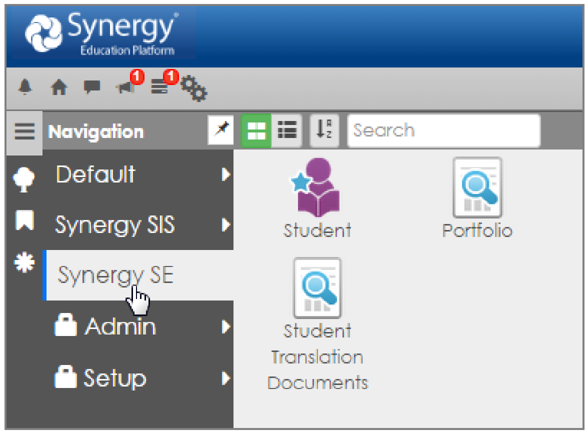


Home Screen

Icon	Description
	TeacherVUE – Opens Synergy SIS TeacherVUE for users, such as principals and specialists, who are not automatically directed to TeacherVUE. Use this button to toggle back and forth between Synergy SIS and TeacherVUE to access items such as attendance and Grade Book for assigned students.
	Home – Returns you to the Home screen.
	Streams – Opens Streams
	Announcements – Displays District Notifications
	Tasks – Displays your tasks
	Job Queue Viewer – Displays the Job Queue Viewer and gives access to completed jobs
	Navigation – Displays the Navigation panel
	PAD Tree – Displays the PAD tree
	Bookmarks – Displays screens that you have bookmarked for easy access
	History – Displays recently visited screens
	Continue where you left off – Displays recently visited screens with current selection
Quick Launch	Quick Launch – Enter the screen name or report ID and select from the drop-down menu

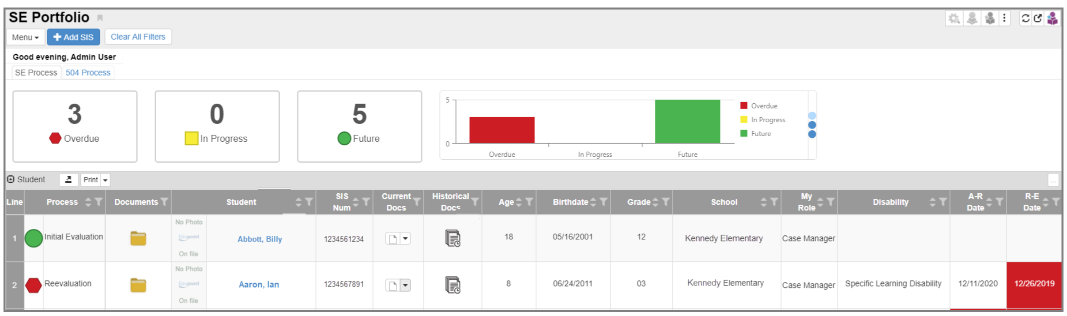
Navigation Panel

Use the Navigation panel to access shortcuts in Synergy SE.



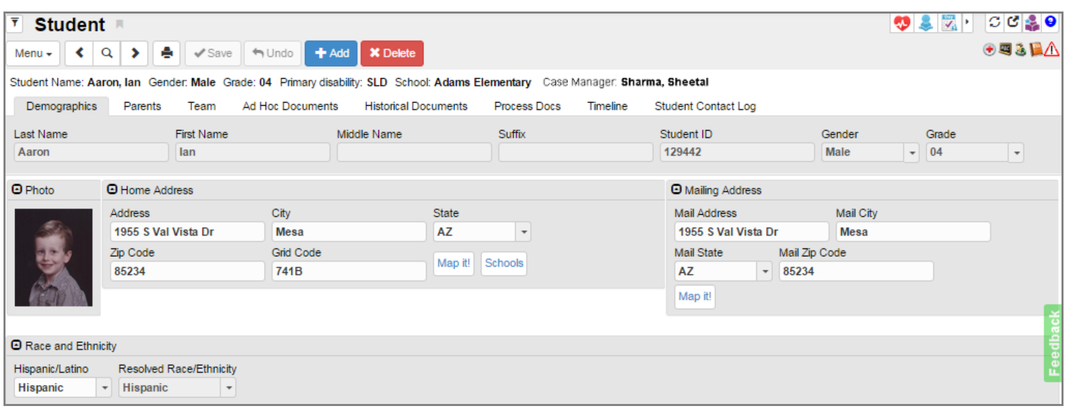
Navigation Panel

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



SE Portfolio Screen

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

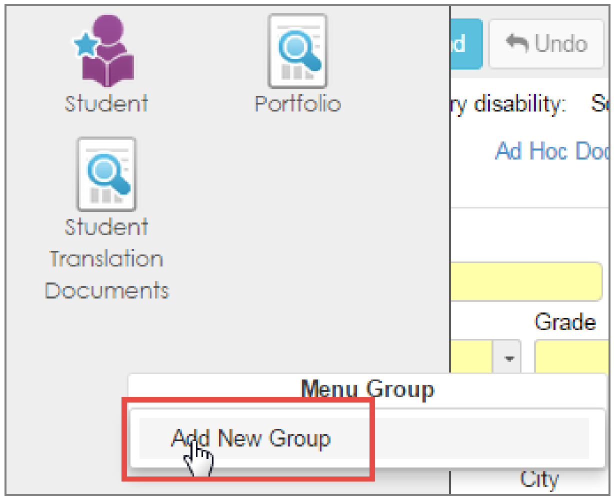


(SE) Student Screen

Editing the Navigation Panel

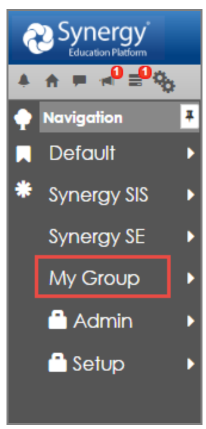
Adding a Group

1. Right-click in the panel and select **Add New Group**



Navigation Panel

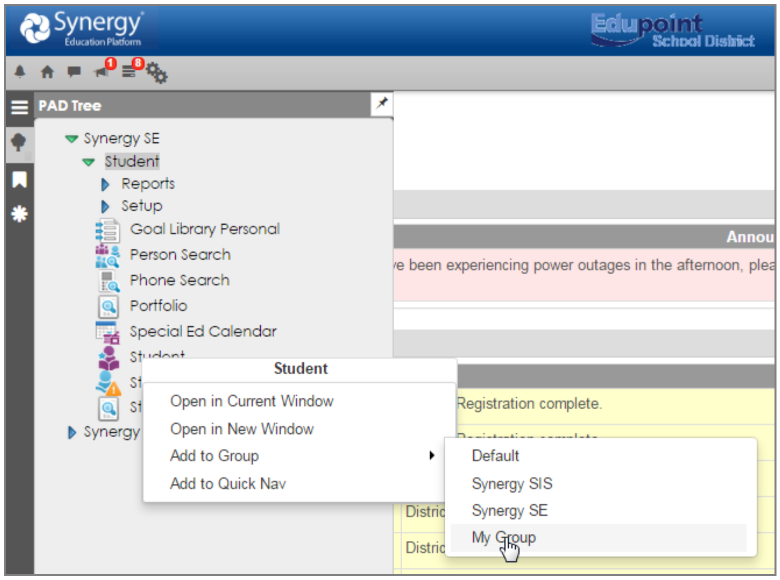
2. Enter the name for the group. It displays in the Navigation list.



Navigation Panel

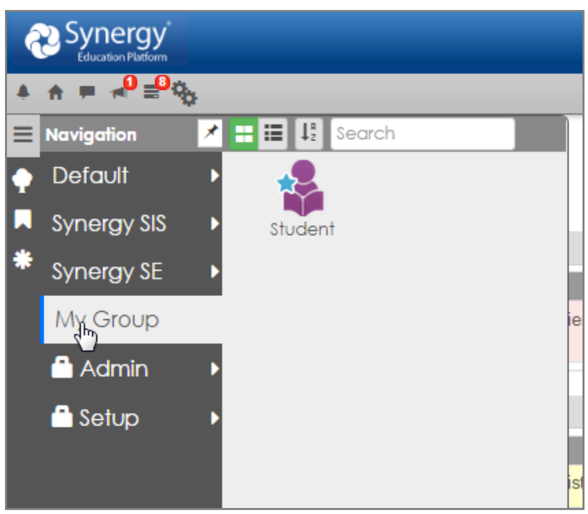
Adding Icons to Your Group

1. Navigate to the item in the PAD tree.
2. Right-click and select **Add to Group > Group Name**.



Add Icon To Group

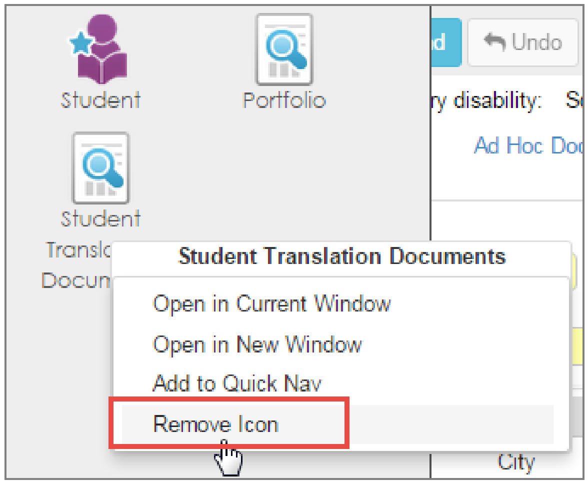
The icon is added to your group.



Navigation Panel, Added Group

Deleing Icons

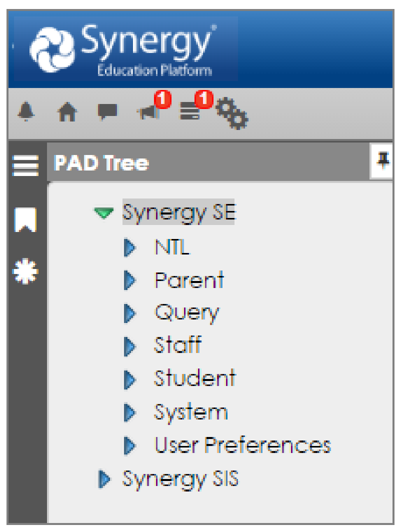
Right-click the icon and select *Remove Icon*.



Navigation Panel

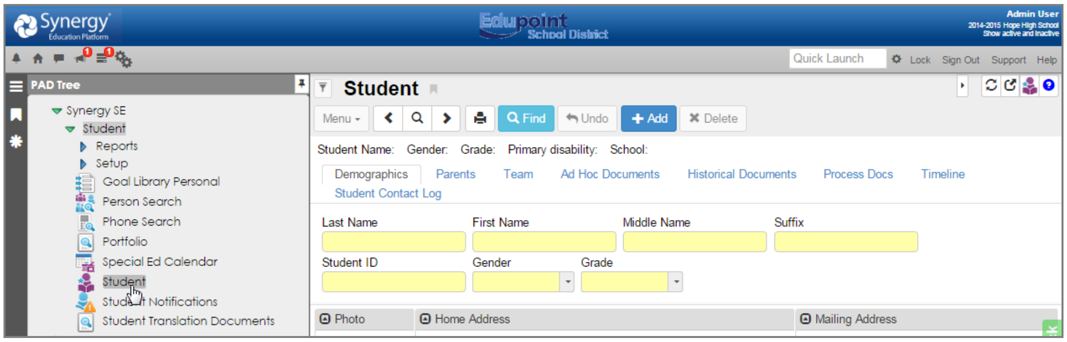
PAD Tree

1. Click ▶ to toggle the menus.



PAD Tree

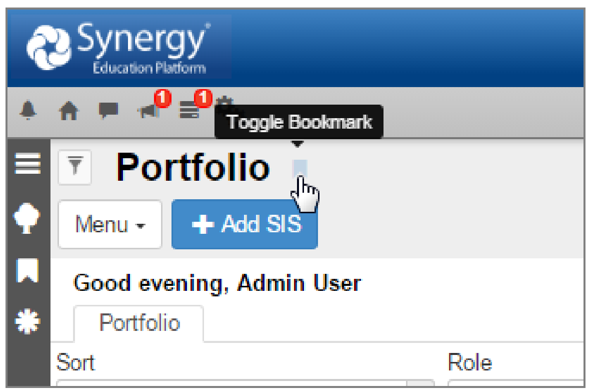
2. Select a screen to display.



PAD Tree

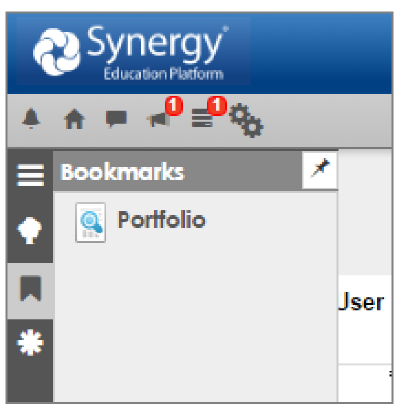
Bookmarks Panel

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



Adding A Bookmark

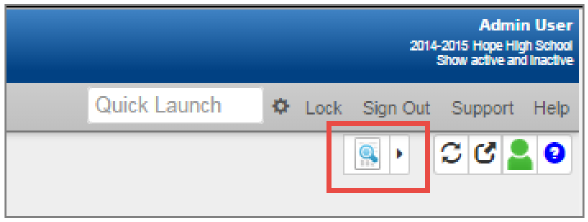
The view displays in the Bookmarks panel.



Bookmarks Panel

Quick Navigation Bar

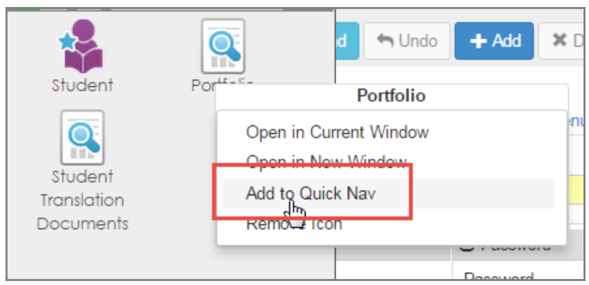
The Quick Navigation Bar is located on the top right side of the screen.



Quick Navigation Bar

Adding an Icon

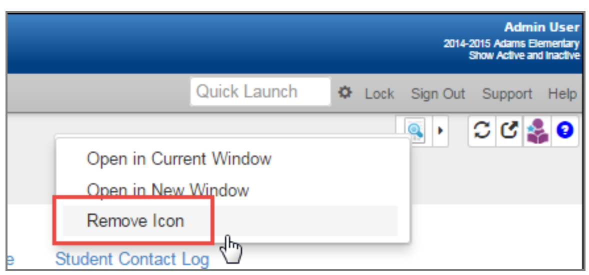
1. Right-click the icon.
2. Select *Add to Quick Nav*. The icon displays in the Quick Navigation Bar.



Navigation Panel

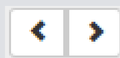
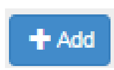
Removing an Icon

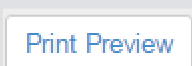
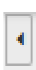
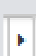
Right click the icon and select *Remove Icon*.

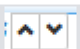


Quick Navigation Bar

Icons and Buttons

Icon	Description
	The **Search** icon displays on the Action Bar with various views. Click the icon to clear the record and activate the **Find** button.
	The **Previous** and **Next** icons display on the Action Bar with various views. Click the icon and the software accesses the database and populates the tab or view with that information. For example, when using the **Previous** icon, the **Demographics** tab of the Student view currently displays information for Becky Johnson. Barbara Johnson's information is listed immediately before Becky Johnson's information in the database. If you click the **Previous** icon, the software clears the fields of Becky Johnson's information and then populates the fields with Barbara Johnson's information.
	The **Add** button displays on the Action Bar with various views. Click the button to add a record to the view.
	The **Delete** button displays on the Action Bar with various views. Click the button to delete a record from the view.
	The **Find** button displays on the Action Bar when search criteria has been entered in a field. Click the button to have the software search the database for information that matches the criteria entered into a specific field or series of fields.
	The **Save** button displays on the Action Bar when the information has been modified in a field on the current view. Click the button to save your additions or changes to fields in the current view. You cannot switch to another view until you click the **Save** or **Undo** buttons.

Icon	Description
	The **Undo** button displays on the Action Bar when information has been entered into a field on the current view. Click the button to remove the additions or changes to fields in the current view. Only the additions or changes in the current view are removed and not to other views you may have open. You cannot switch to another view until you click the **Undo** or **Save** buttons.
	The **Refresh Page** icon displays on the right side of the Action Bar. Click the icon to refresh the entire view.
	The **Detach Page** icon displays on the right side of the Action Bar, next to the **Refresh Page** icon. Click the icon and a new window displays your active window to allow you to keep this page open while navigating to other screens within Synergy SE. • Minimize the detached page to navigate other screen. • Maximize the detached page when you are ready to work in it again.
	The **Print Preview** button displays on the Action Bar with highlighted text when the software displays an IEP-related view for a student. Click the button to generate a PDF of the document (report) that you are working on. The software generates a PDF file to display the document in Adobe Acrobat Reader in the user's browser.
	The **Expand** icon displays on the right side of the Title Area when the Quick Navigation bar is collapsed. Click the icon to expand the Quick Navigation Bar.
	The **Collapse** icon displays on the right side of the Title Area when the Quick Navigation Bar is expanded. Click the icon to collapse the Quick Navigation Bar.
	The **Down Arrow** icon displays on group boxes and text boxes. Click the icon to expand the group box or increase the size of the text box.
	The **Up Arrow** icon displays on group boxes and text boxes. Click the icon to collapse the group box or decrease the size of the text box.

Icon	Description
	The **Show Detail** icon displays on the right side of some grids. Click the icon to display additional details for the item selected in the section.
	he **Hide Detail** icon displays on the right side of some grids. Click the icon to collapse the detail section and return to a section.
	The **Calendar** icon displays in date fields. Click the icon to select the date from the calendar. Dates may also be entered in **MM/DD/YYYY** format.
	The **Spell Check** icon displays in text boxes. Click the icon to spell check the text in the text box.
Please repond	Misspelled words in text boxes are indicated by a red line. Right-click to select the correct word.
 or 	The **Expand** icons display in text boxes. Use the arrows or drag the corner to expand the text box.

Modes

Find Mode

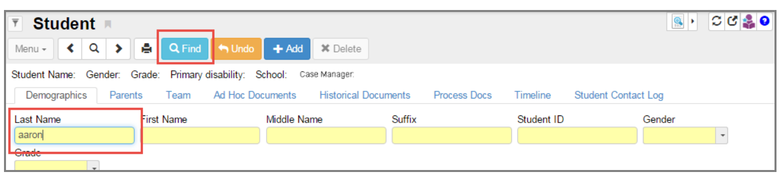
Use **Find** mode to search for records on the Student, Parent, Staff, User Profile, and Setup (Goal Library and User) screens. The **Find** button displays on the Action Bar when it is enabled.

1. Enter the search criteria into a specific field on the active tab to search for a record.

   For example, enter a student's **Last Name** on the **Demographics** tab of the Student screen.

2. Click **Find** to have the software search the database for the last name.
   Using the Student screen as an example:

   - If the software finds only one match to the last name, it populates the fields in the **Demographics** tab of the Student screen with the information that is associated with that student.
   - If the software does not find a match to the last name, it searches the database in ascending order (alphabetically by last name) and populates the fields in the **Demographics** tab of the Student screen with the name that is listed alphabetically after the name you entered in the field.
   - If multiple matches to the last name are available in the software database, the software opens a new view that contains a section with all of the matches for the student's last name and first name. Select the student that you need, and the software populates the fields in **Demographics** tab of the Student screen with the information that is associated with that student.



(SE) Student Screen

Edit Mode

When in **Edit** mode, your ability to add or change information depends on whether you have **Edit** or **Read-only** rights.

- Edit rights allow you to edit the fields on the current view.
  The **Save** and **Undo** buttons are activated on the Action Bar if you have Edit rights.

- Read-only rights allow you to view fields on the current view, but not edit them.
  The **Save** and **Undo** buttons are not activated on the Action Bar if you have Read-only rights.

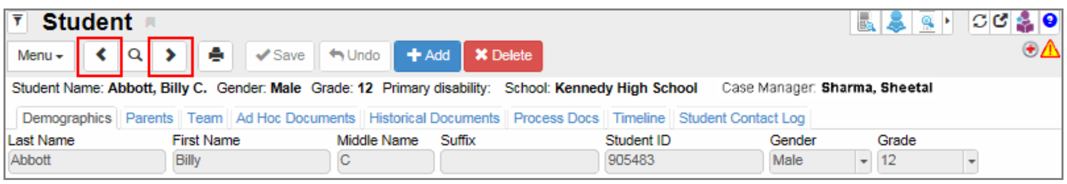
Finding and Sorting Records

The focus controls the records available. For example, if the focus is set to only show active students at a specific school, an inactive student's recordsare not found by scrolling nor active student's at a different school.

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

Scrolling to Find Records

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

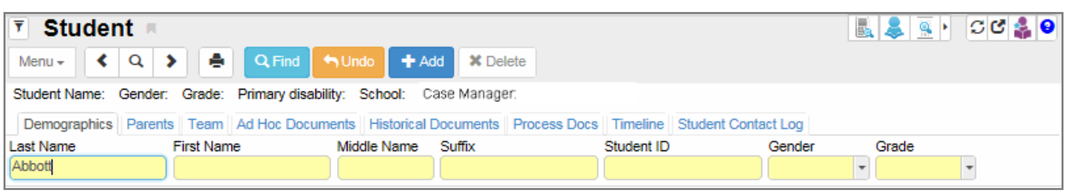


(SE) Student Screen

Searching by Primary Field

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

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



(SE) Student Screen

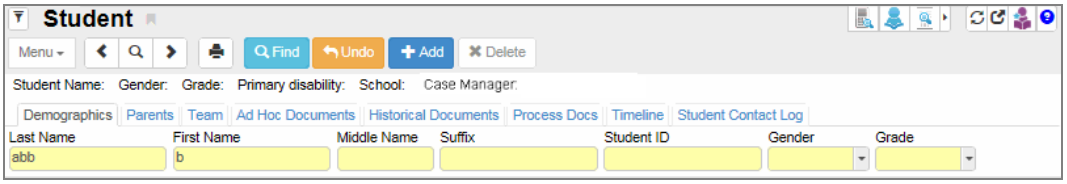
3. Click **Find** or press **Enter**. The first record with that information displays.

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

Searching Using Multiple Fields

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

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



(SE) Student Screen

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

Using the Find Results Screen

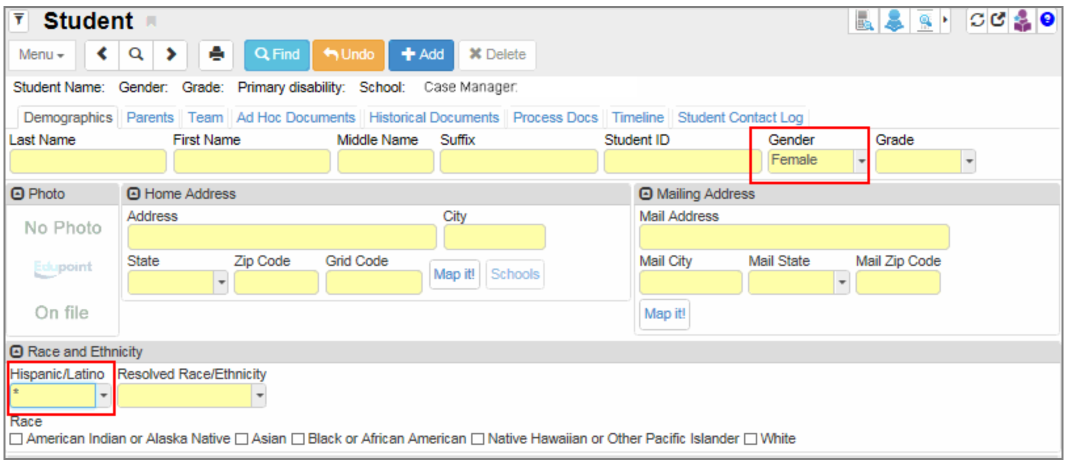
When information is entered in the primary field, Find mode tries to match the criteria and display the specific record in the Synergy SE database. However, the Find Results screen displays when multiple results are available from the search criteria such as:

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

1. Click to clear the existing record.
2. Enter an asterisk (*) in the appropriate fields or make a selection from a drop-down to search for specific information.

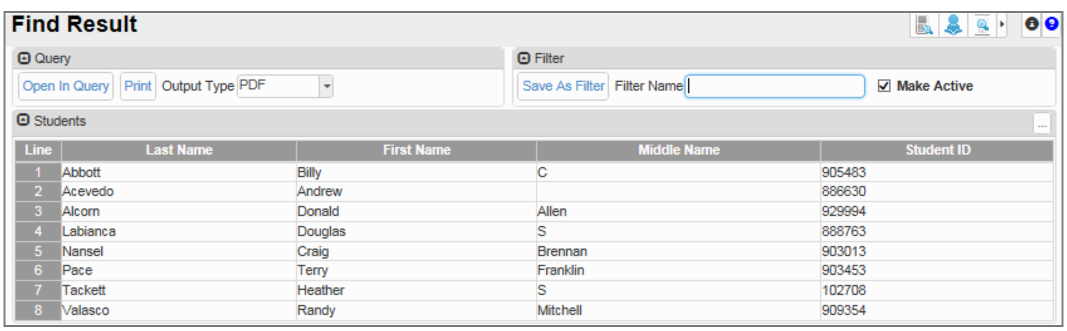
   The placement of asterisk (*) in the field controls how the existing information entered in the field is matched to the records.

   - If asterisk (*) is placed before the text, the text must be matched exactly in the field.
   - If asterisk (*) is placed after the text, it matches any records that start with that text in the field.
   - If asterisk (*) is placed before and after the text, the text may be anywhere in the field.
   - If 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.

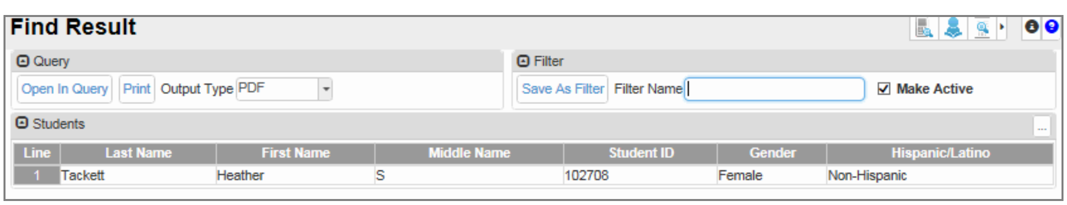


(SE) Student Screen

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

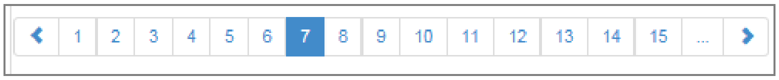


Find Result Screen (Using Empty Fields)



Find Result Screen (Using Asterisk)

4. Select a line to display the record.

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

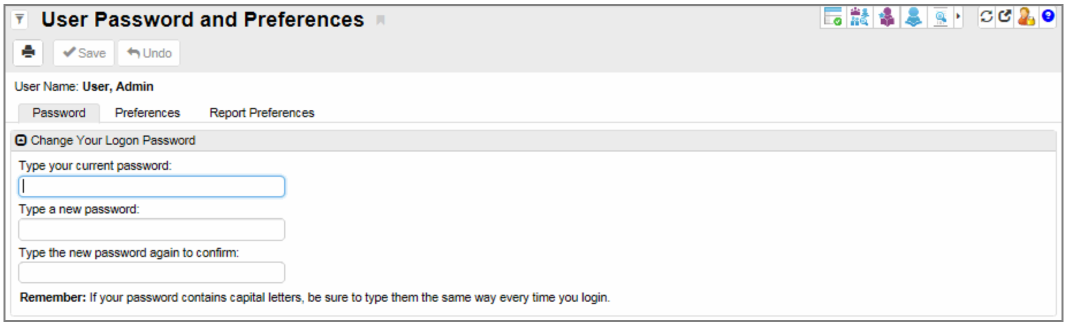
- Select the page number to display a specific page.
- Select a different line to select another record.
- Click to advance to the next page.
- Click to see additional page numbers.

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

Chapter 2: Managing the Synergy SE Account

Changing Password

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



User Password And Preferences Screen

Setting Preferences

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

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

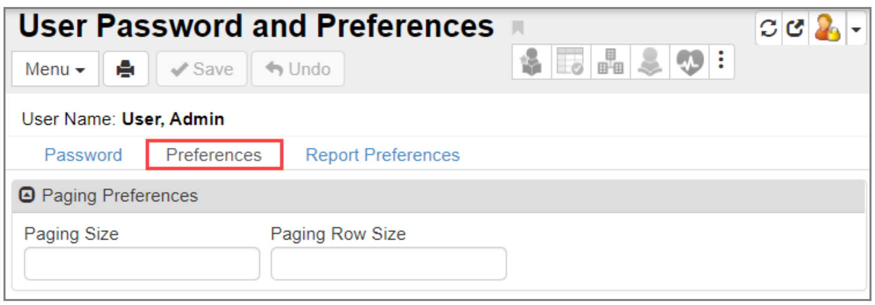
User Password And Preferences Screen, Preferences Tab

Paging Preferences

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

> Searches display more slowly when more records display.

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



User Password And Preferences Screen, Preferences Tab

5. Click **Save**.

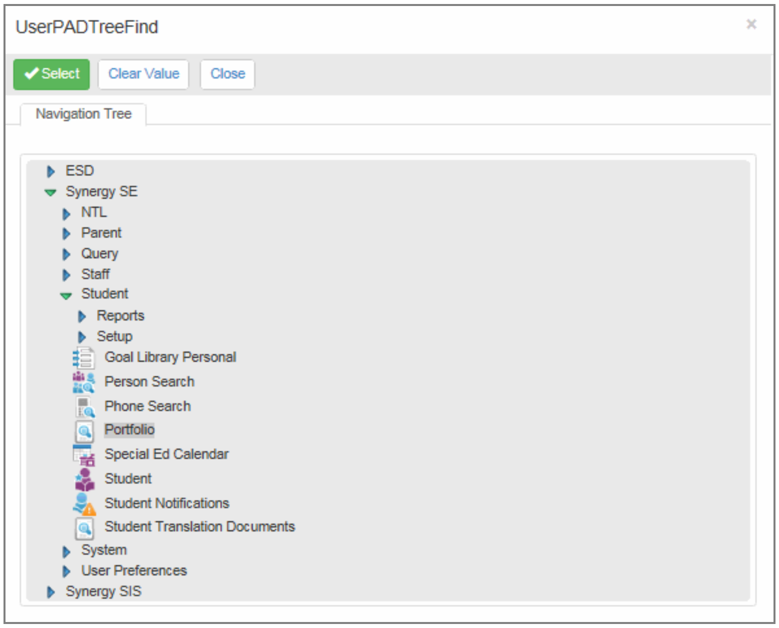
Point of View Home Page

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

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

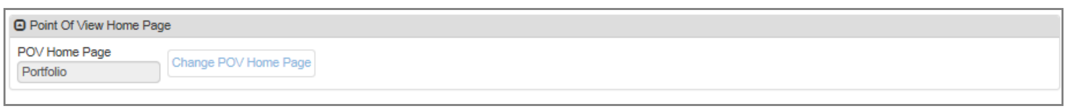
User Password And Preferences Screen, Preferences Tab

4. Use to locate the screen.



UserPADTreeFind Screen

5. Click **Select**. The selected screen displays in the **POV Home Page** field.



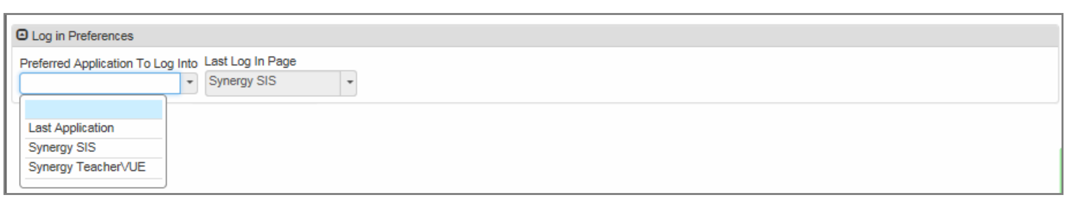
User Password And Preferences Screen, Preferences Tab

6. Click **Save**.

Log in Preferences

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

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

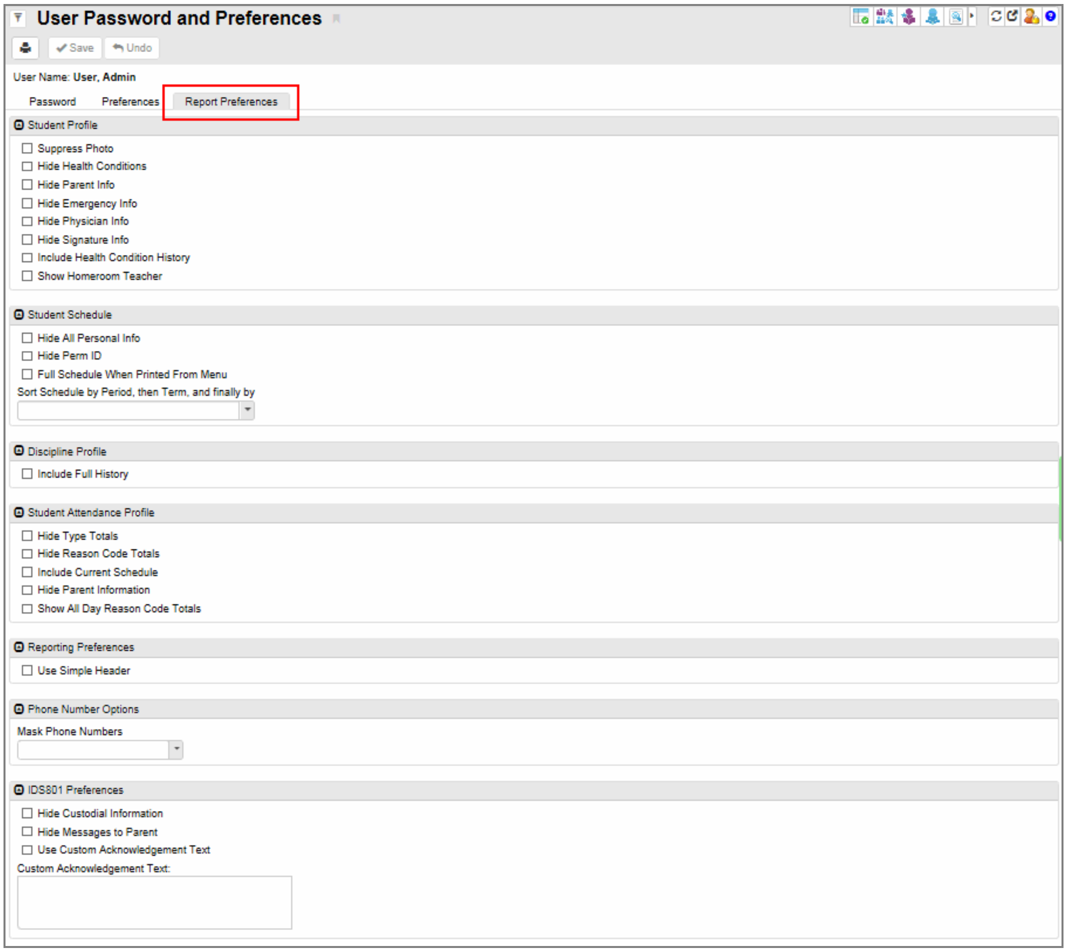


User Password And Preferences Screen, Preferences Tab

4. Click **Save**.

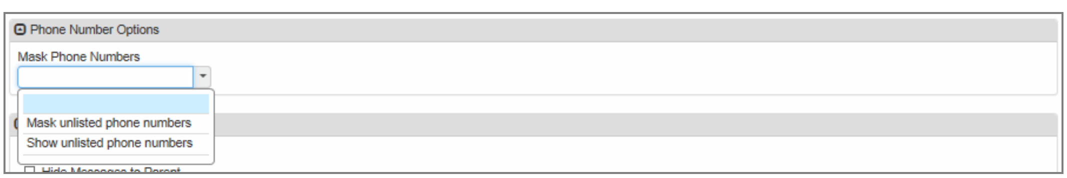
Report Preferences

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



User Password And Preferences Screen, Report Preferences Tab

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



User Password And Preferences Screen, Report Preferences Tab

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

User Password And Preferences Screen, Report Preferences Tab

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

4. Click **Save**.

Setting User Profile

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

Demographics Tab

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

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

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

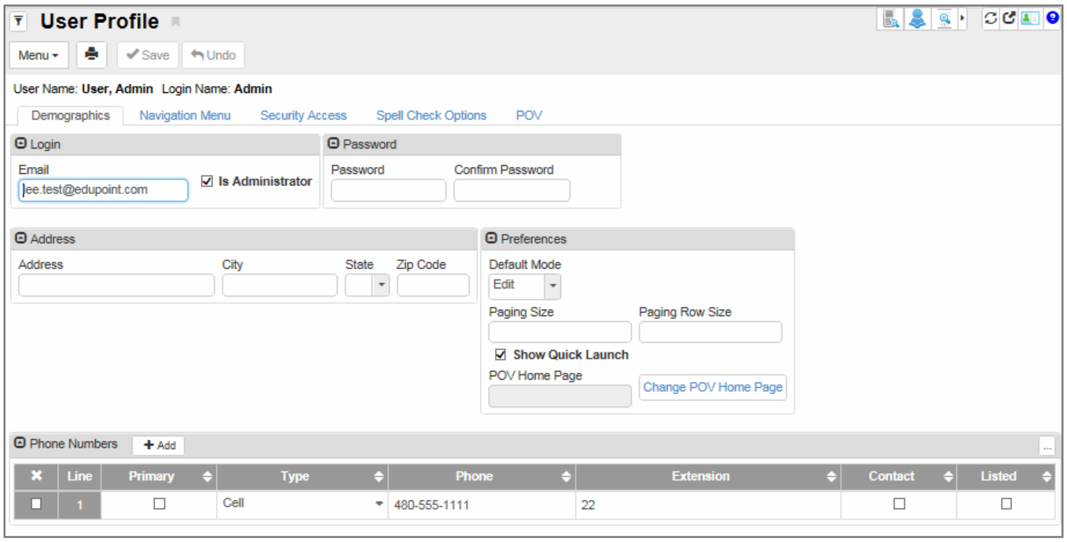
        - **Show Quick Launch** - Select the option to use the **Quick Launch** field in the tool bar.

Quick Launch Field

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

> These fields can also be set on the **Preferences** tab of the User Password and Preferences screen. See the Setting Preferences instructions for details.

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

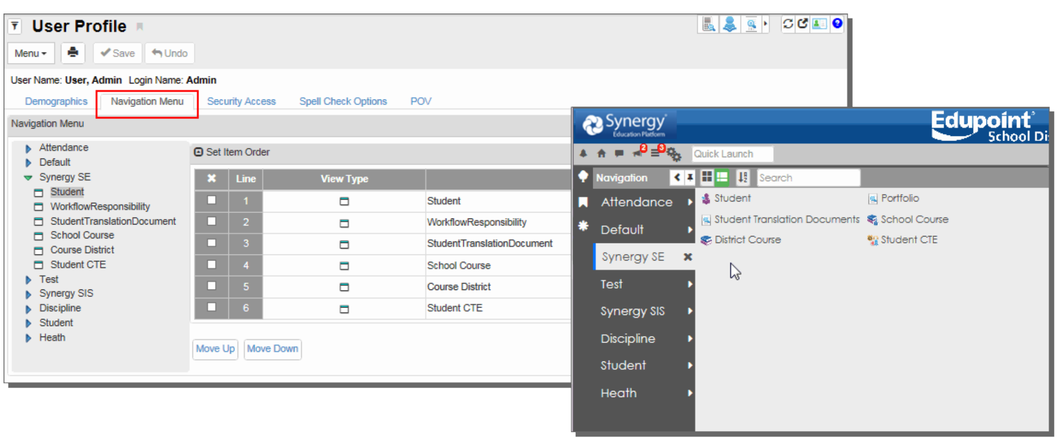


User Profile Screen

3. Click **Save**.

Navigation Menu Tab

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

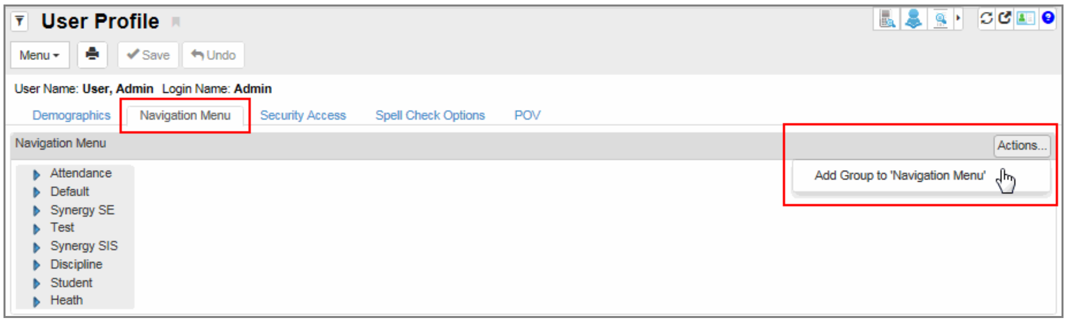


User Profile Screen, Navigation Menu Tab

Add Group

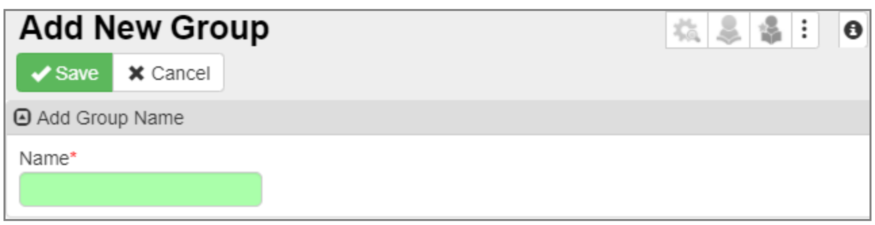
1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **Navigation Menu** tab.
3. Select *Add Group* from **Actions** to open the Add New Group screen.

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



User Profile Screen, Navigation Menu Tab

4. Enter a name for the toolbar.



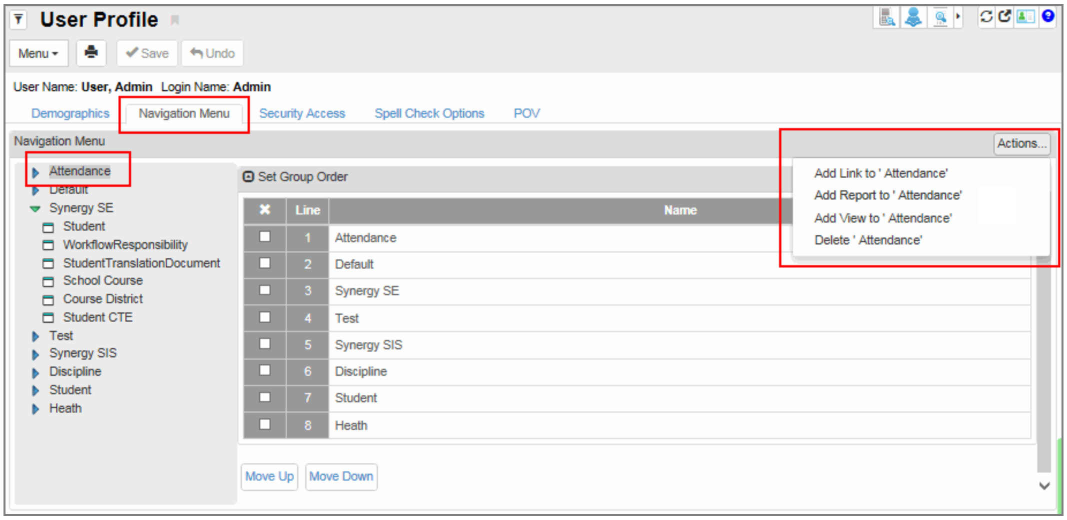
Add New Group Screen

5. Click **Save**. The new group displays in the Navigation Tree.
6. Adjust the group order if needed.
   a. Select the line number of the group to highlight.
   b. Click **Move Up** or **Move Down** to change the view order.
   c. Repeat until the groups are in the required order.
7. Click **Save**.

> Select the **X** column and click **Save** to delete a group.

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

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



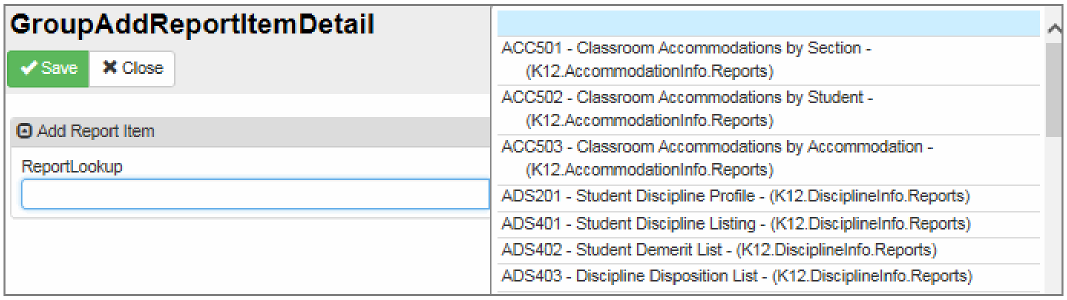
User Profile Screen, Navigation Menu Tab

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

GroupAddLinkDetail Screen

     c. Click **Save**.

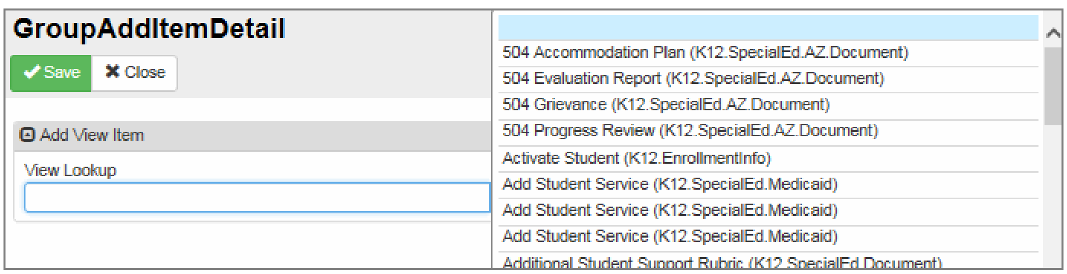
- To add a report:
    a. Select *Add Report to 'Group Name'* from the **Actions** menu to open the GroupAddReportItemDetail screen.
    b. Select a report from **ReportLookup**.



GroupAddReportItemDetail Screen

    c. Click **Save**.

- To add a view:
    a. Select *Add View to 'Group Name'* from the **Actions** menu to open the GroupAddItemDetail screen.
    b. Select a view from **View Lookup**.

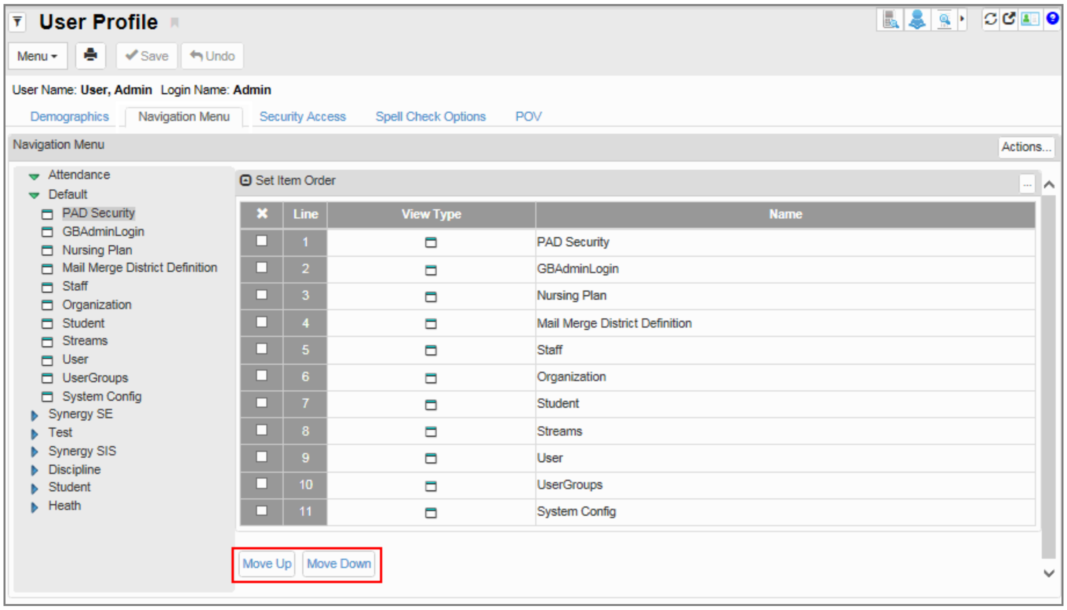


GroupAddItemDetail Screen

    c. Click **Save**.

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

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



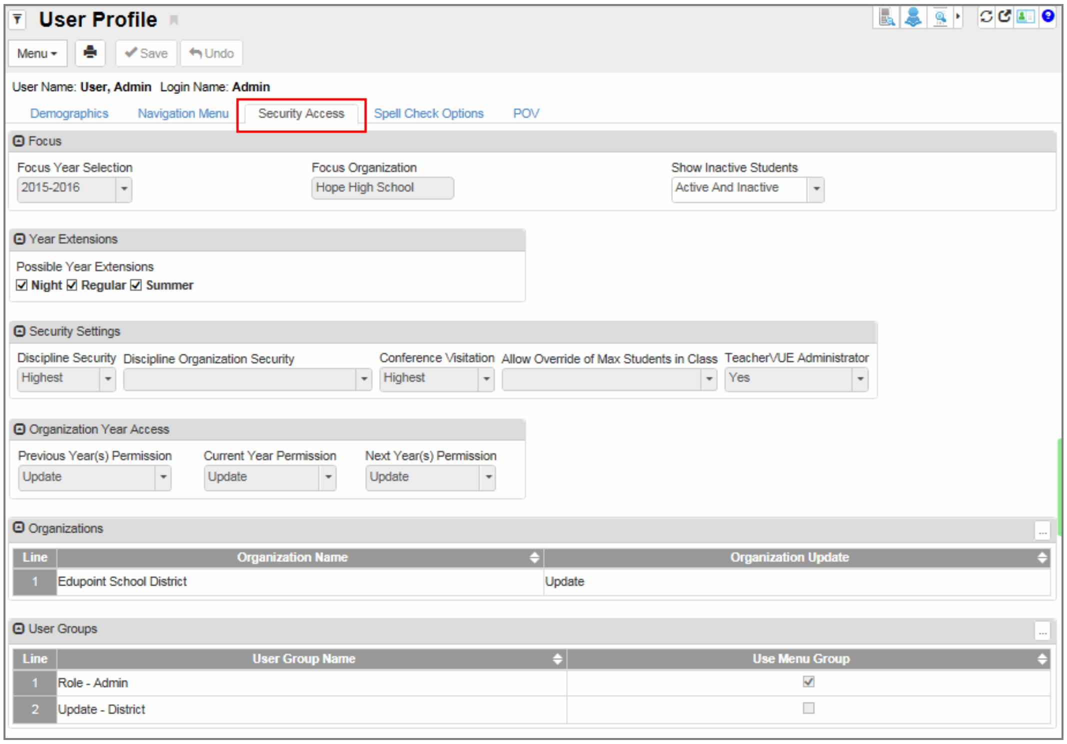
User Profile Screen, Navigation Menu Tab

6. Click **Save**.

Select the **X** column and click **Save** to delete an item in the group.

Security Access Tab

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



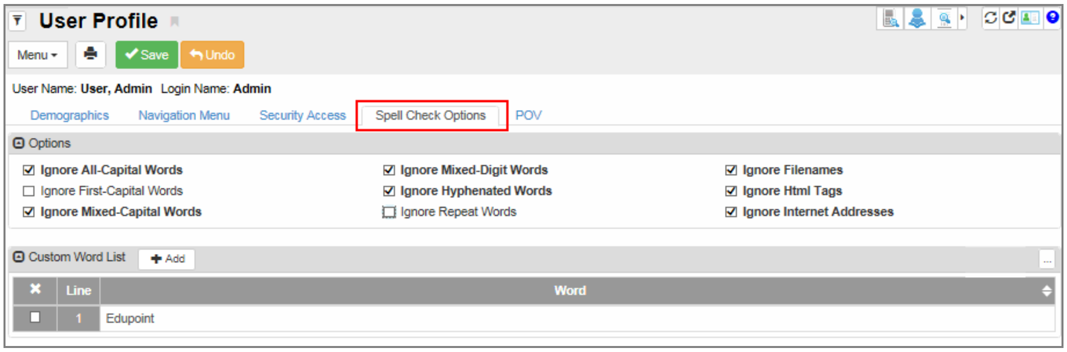
User Profile Screen, Security Access Tab

Spell Check Options Tab

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

1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **Spell Check Options** tab.
3. Select the **Options** to ignore types of spell check.
4. Add custom words:
   a. Click **Add** in the Custom Word List section to create a new line.
   b. Type the new **Word**.

Select the **X** column to delete a custom word.



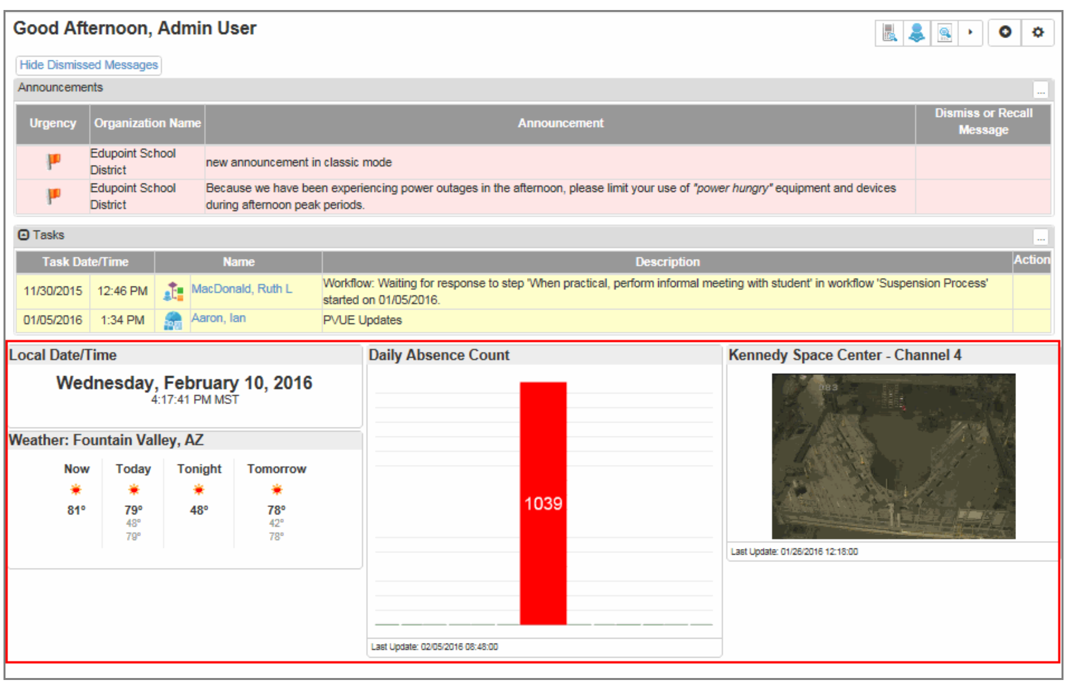
User Profile Screen, Spell Check Options Tab

5. Click **Save**.

POV Tab

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

- Announcements
- Tasks grid
- Widgets



Home Screen

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

Dashboard Controls

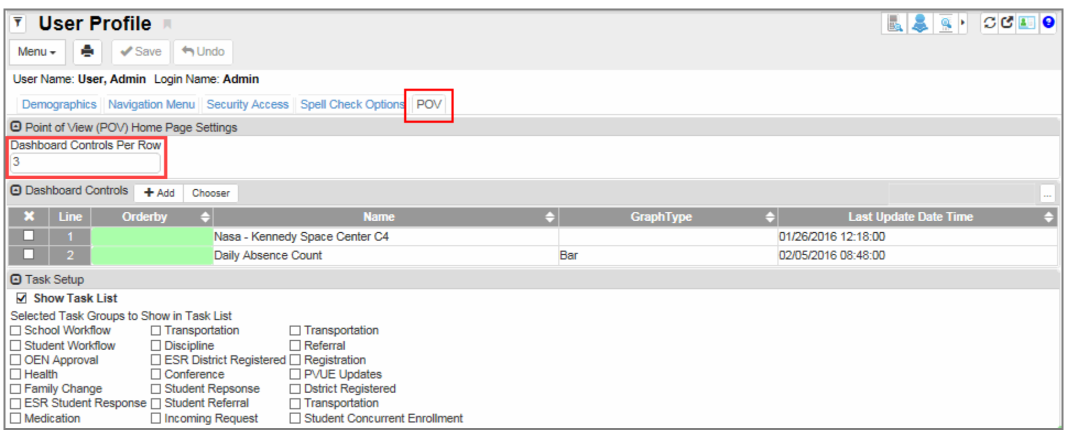
A dashboard control or widget is a graphical reporting tool designed to track student data trends or link to external web-based sources. The widgets that you can select are set up by your system administrator. These widgets:

- Display on the Synergy SE home screen to give the users an overview of different trends occurring in either the school or the district.
- Can track different information, such as enrollments by day, attendance patterns, or grades.
- Can be created from a Synergy Query.

Add Widgets

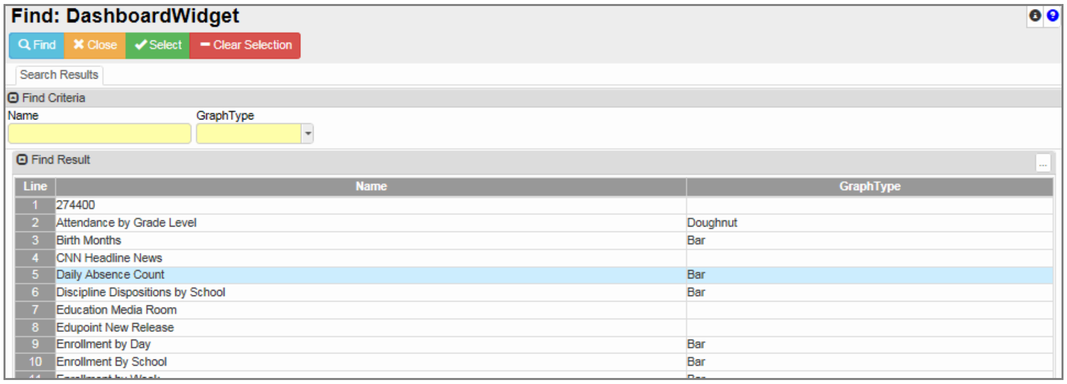
1. Navigate to **Synergy SE > User Preferences > User Profile**.
2. Select the **POV** tab.
3. Enter the number of columns to contain the widgets in **Dashboard Controls Per Row**.

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



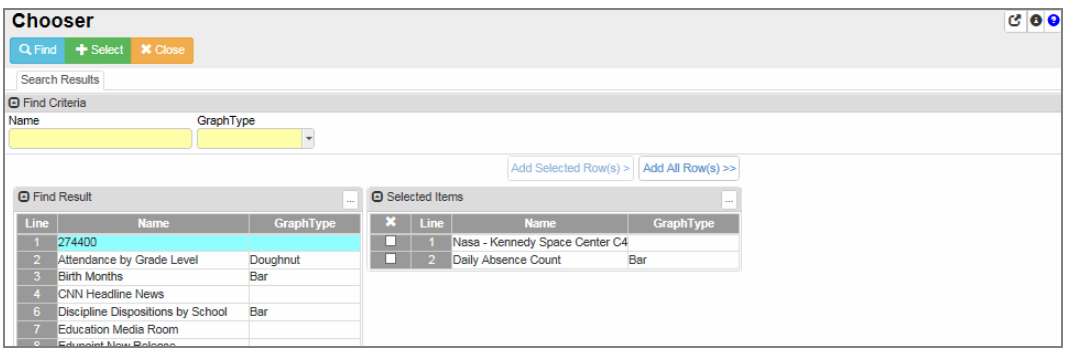
User Profile Screen, POV Tab

4. Add widgets:
    - Click **Add** in the Dashboard Controls section to add a single widget using the Find: DashboardWidget screen.



Find: DashboardWidget Screen

- Click **Chooser** to add multiple widgets using the Chooser screen.

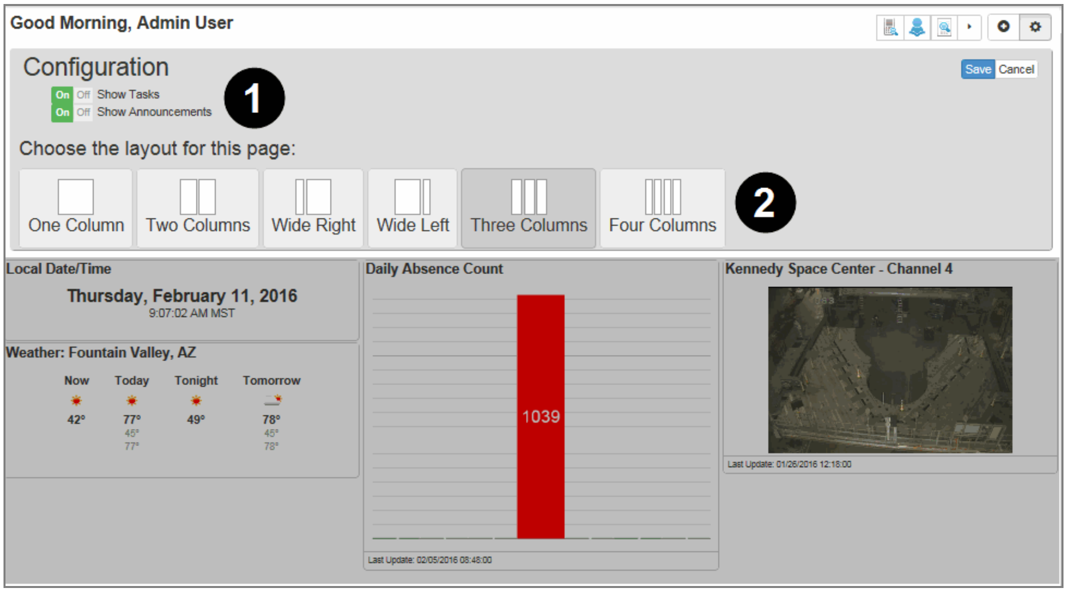


Chooser Screen

5. Locate the widgets.
6. Click **Select**. The widgets are added to the home screen.

Managing Widgets on the Home Screen

Screen Layout



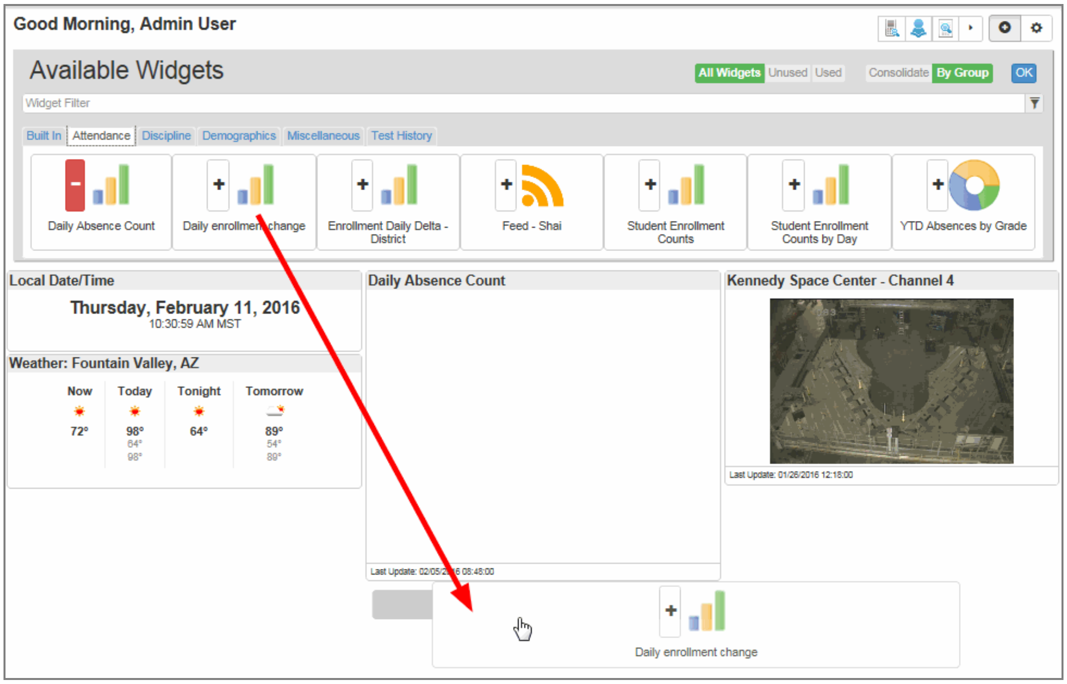
Dashboard Configuration Screen

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

Adding Widgets from Home Screen

1. Click to open the Available Widgets screen.
2. Select an Available Widget and drag it to a column.

3. Click **OK**.

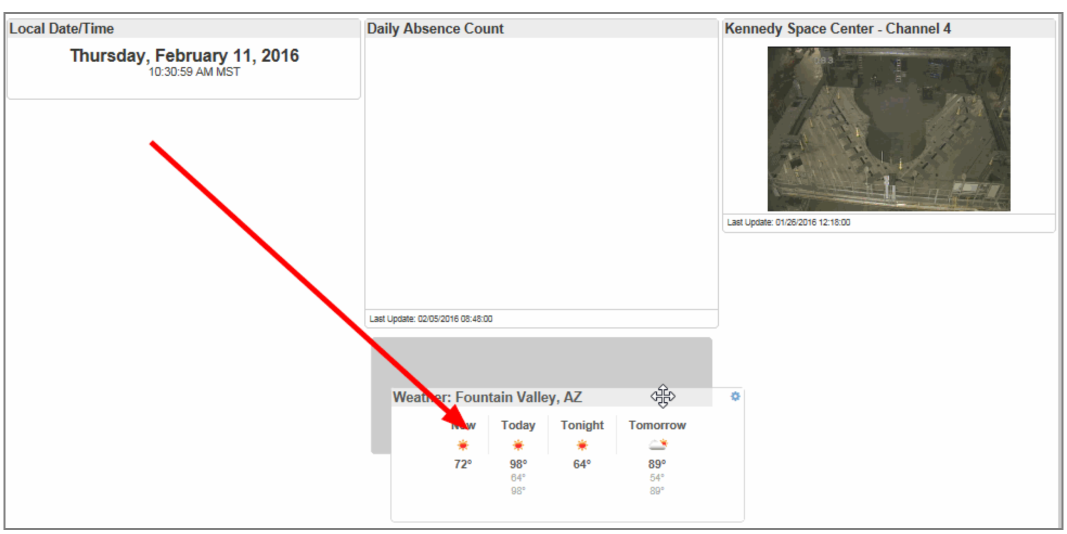


Home Screen

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

Moving Widgets on Home Screen

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



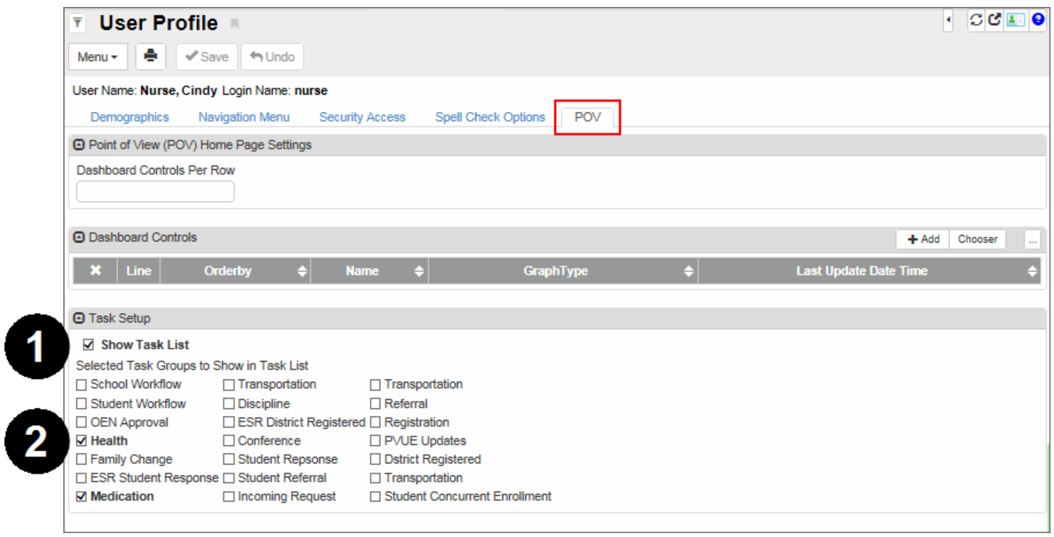
Home Screen

Tasks

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

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

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



User Profile Screen, POV Tab

Chapter 3: Managing Students

Overview

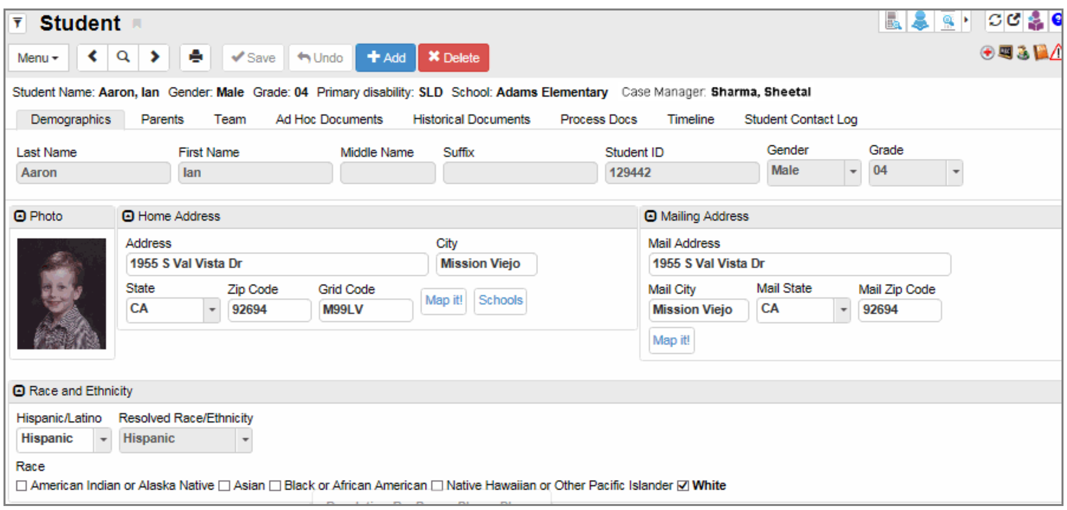
Synergy SE documents and special education student data are accessed from the (SE) Student screen or the SE Portfolio screen.

SE Student Screen

The SE Student screen

- Provides school administrators and secretaries, who do not belong to a student's team, access to special education student data.
- Displays individual student records.
- Displays student notifications.
- Has multiple tabs that contain the student information. The student's Name, Student ID, Gender, and Grade display on every tab.
- Can be accessed from **Synergy SE > Student > Student**.

Some districts rename the (SE) Student screen.



(SE) Student Screen

Demographics Tab

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

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

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

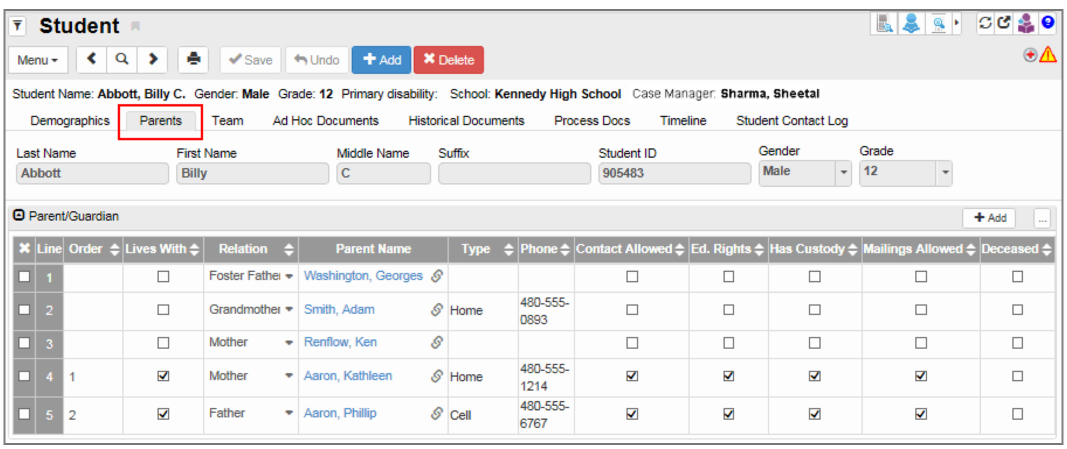
Some of the information is imported into the special education documents. These fields include:

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

Parents Tab

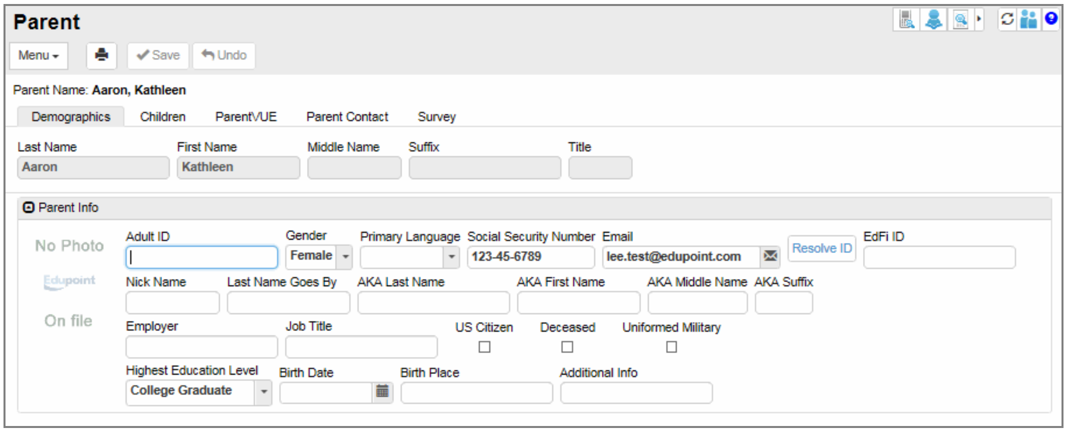
The **Parents** tab contains a section that

- Lists the student's relationships.
- Indicates the people the student **Lives With**.



(SE) Student Screen, Parents Tab

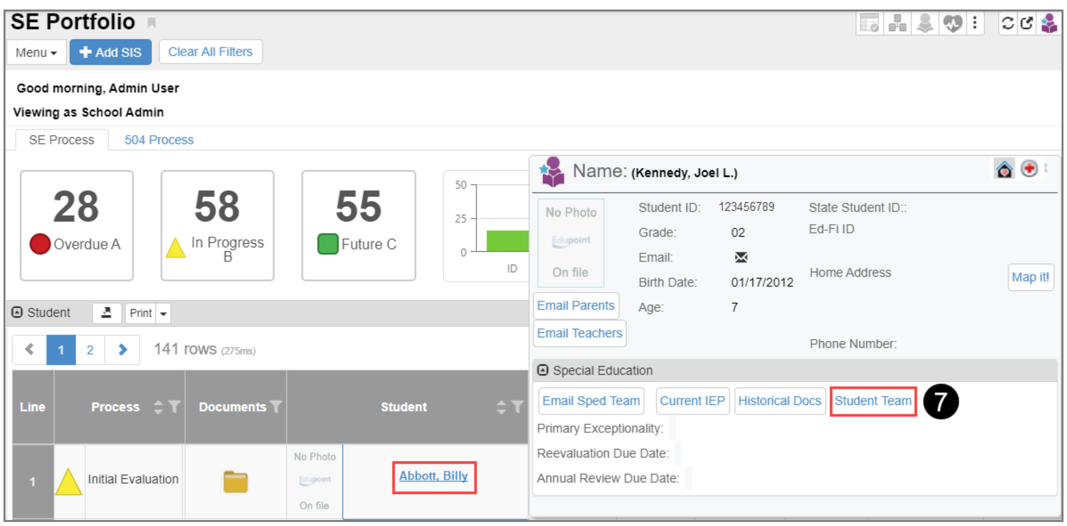
- Contains a **Parent Name** link to open the Parent screen with more information about the person.



Parent Screen

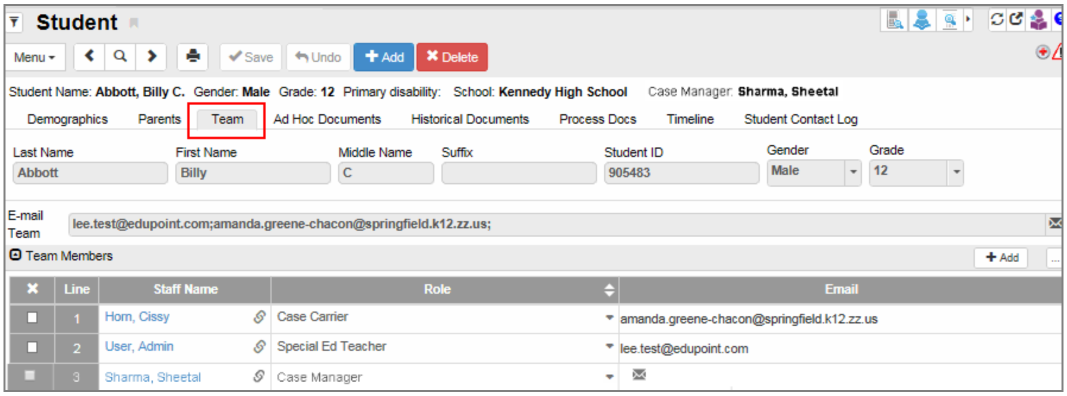
Team Tab

The **Team** tab displays the student's special education team members. Users who belong to a student's team list see that student when **Student Team** is clicked in the student name snapshot on the SE Portfolio screen.



SE Portfolio Screen

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



(SE) Student Screen, Team Tab

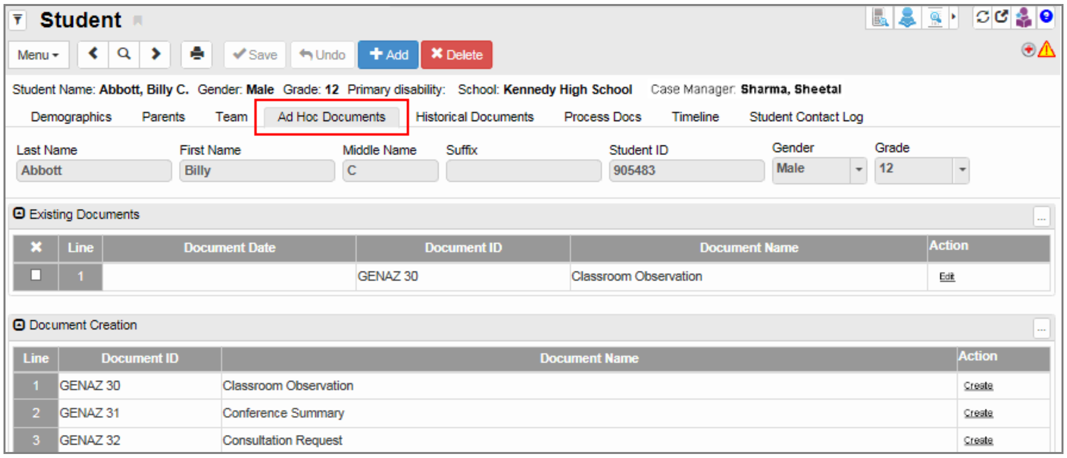
The following functionality applies to the **Team** tab if your district uses concurrent processes:

- The 504 school team is added to the student if the student is in a SpEd Process and later added to a new 504 Process. The existing staff do not duplicate.
- The SpEd school team is added to the student if the student is in a 504 Process and later added to a new SpEd Process. The existing staff do not duplicate.
- All staff remains on the **Team** tab if the student is in a SpEd Process and removed from the 504 Process.
- All staff remains on the **Team** tab if the student is in a 504 Process and removed from the SpEd Process.

Ad Hoc Documents Tab

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

> See the *Oregon Special Education Document Guide* for more information on Ad Hoc documents.



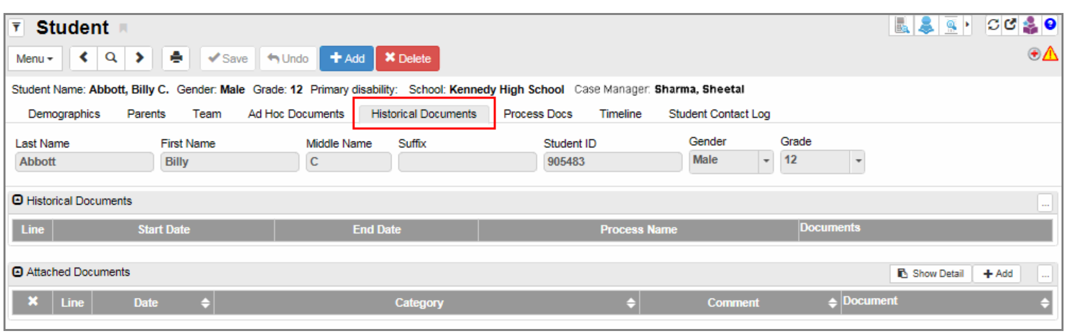
(SE) Student Screen, Ad Hoc Documents Tab

Historical Documents Tab

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

> See the *Oregon Special Education Document Guide* for more information on historical documents.

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



(SE) Student Screen, Historical Tab

Process Docs Tab or SpEd Docs Tab

> The **SpEd Docs** tab and **504 Docs** tab display if your district uses concurrent SPED and 504 processes. The Current 504 Settings section moves to the **504 Docs** tab.

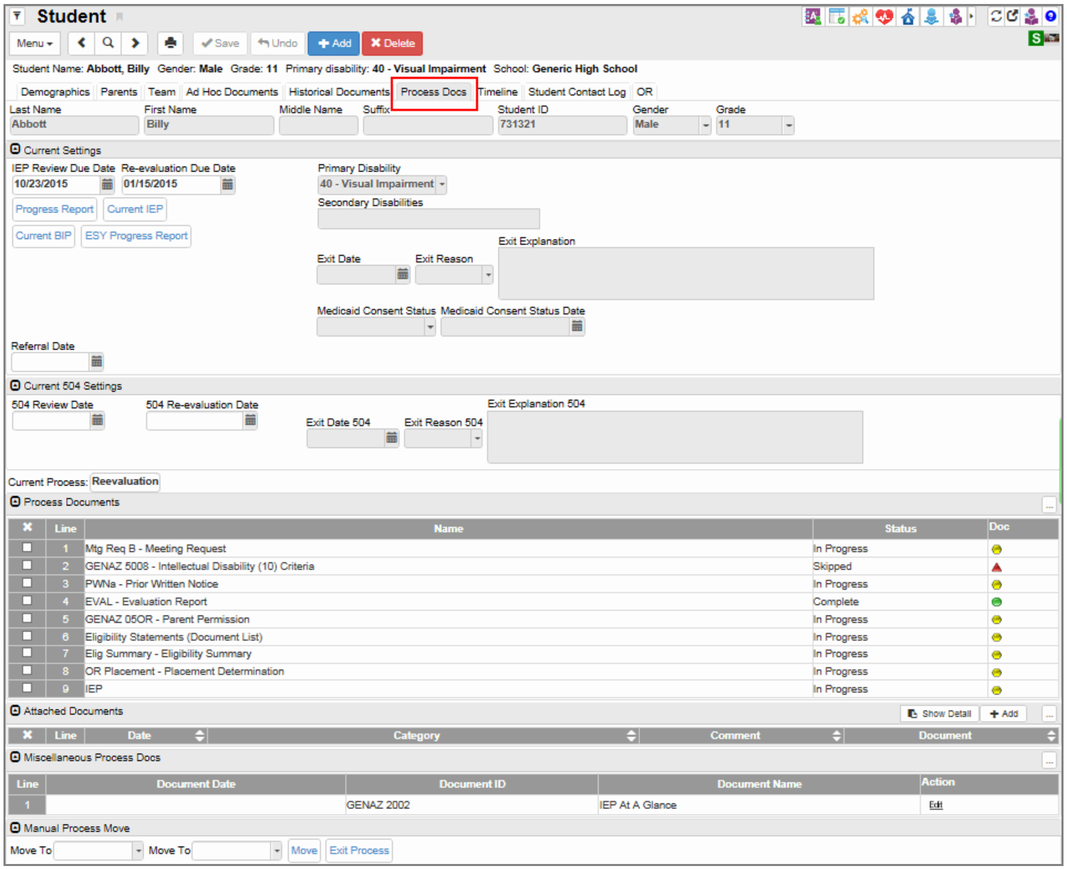
The **Process Docs** tab displays the documents related to a process. Some information may be edited but other information is read only.

- **Current Settings** contains:
  - **IEP Review Due Date** – The date the next IEP is due and it is generated or updated each time the IEP is finalized
  - **Reevaluation Due Date** – The date the next evaluation is due and it is generated or updated each time the eligibility determination document is finalized
  - **Current IEP** – Opens a view only copy of the student's current IEP that has been finalized (locked)
  - **Progress Report** – Opens the student's current progress report for updating
  - **Current BIP** – Opens a view only copy of the student's current BIP that has been finalized (locked)
  - **ESY Progress Report** – Opens the student's current ESY Progress report for updating
  - **Current BIP Date** – The date of the current BIP
  - **Next BIP Date** – The date of the next BIP is due
  - **Disabilities** – Pulls from the eligibility determination documents

    > Concurrent Disabilities display if used by your district.

  - **Exit Date**, **Exit Reason**, and **Exit Explanation** – Pulls from the Exit Process when a student exits from special education because they no longer need services or they move out of the district.
  - **Medicaid Consent Status** and **Medicaid Consent Status Date** – Pulls from the GENAZ 520 document or the **Medicaid** tab of the IEP
  - **Referral Date** – The date the student was referred to special education
- **Current 504 Settings** contains:
  - **504 Review Date** – The date the 504 review was held
  - **504 Reevaluation Date** – The date for the next 504 evaluation
  - **Exit Date 504**, **Exit Reason 504**, and **Exit Explanation 504** – Pulls from the Exit Process when a student exits from the 504 process because they no longer need services or they move out of the district

- **Process Documents** contains documents specific to the current process the student is in. The documents are:
  - Represented by color coded icons like in the SE Portfolio screen that indicate the status
  - Available for creating, viewing, or editing, depending on user security
- **Attached Documents** contains any Word or PDF documents the team wants to associate with the process.
- **Manual Process Move** is available to manually move a student to another process.

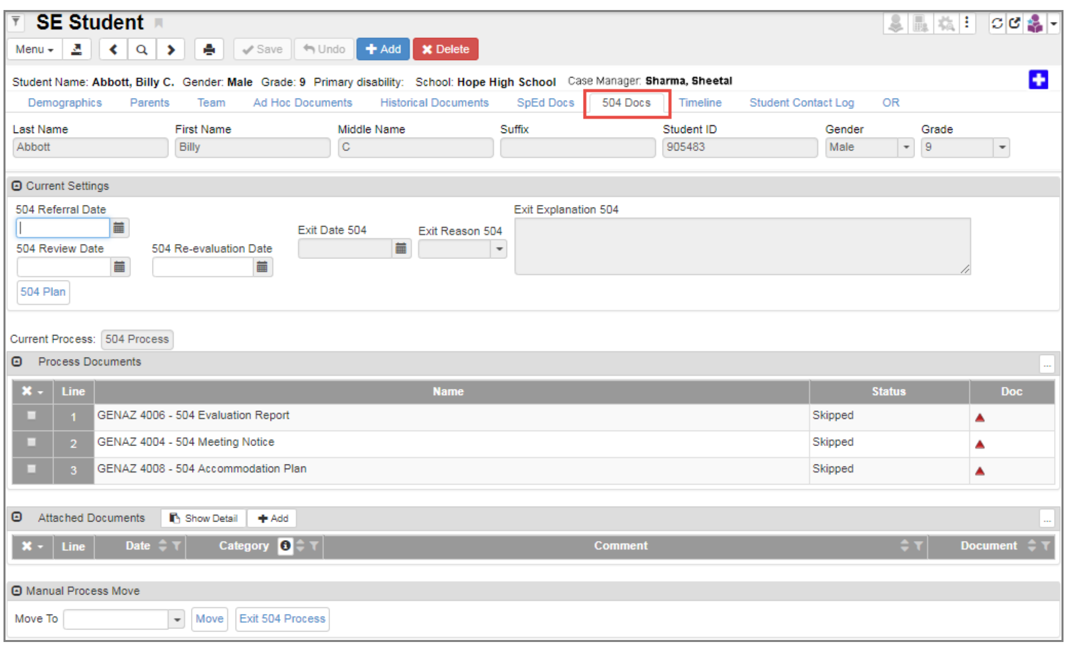


504 Docs Tab

> The **504 Docs** tab displays if your district uses concurrent SPED and 504 processes.

The **504 Docs** tab displays the documents related to a process. Some information may be edited but other information is read-only.

- **Current Settings** contains:
  - **504 Referral Date** – Date when the 504 process was initiated for the student
  - **Current 504 Plan Date** – Date of the current plan
  - **Current 504 Evaluation Date** – Date the 504 evaluation was held
  - **504 Review Date** – Date the 504 review was held
  - **504 Reevaluation Date** – Date for the next 504 evaluation
  - **504 Plan** – Opens a read-only copy of the student's current 504 Plan that was finalized (locked)
  - **Exit Date 504**, **Exit Reason 504**, and **Exit Explanation 504** – Pulls from the Exit Process when a student exits from the 504 process because they no longer need services or they move out of the district
- **Process Documents** contains documents specific to the current process the student is in. The documents are:
  - Represented by color coded icons like in the SE Portfolio screen that indicate the status.
  - Available for creating, viewing, or editing, depending on user security.
- **Manual Process Move** is available to manually move a student to another process.



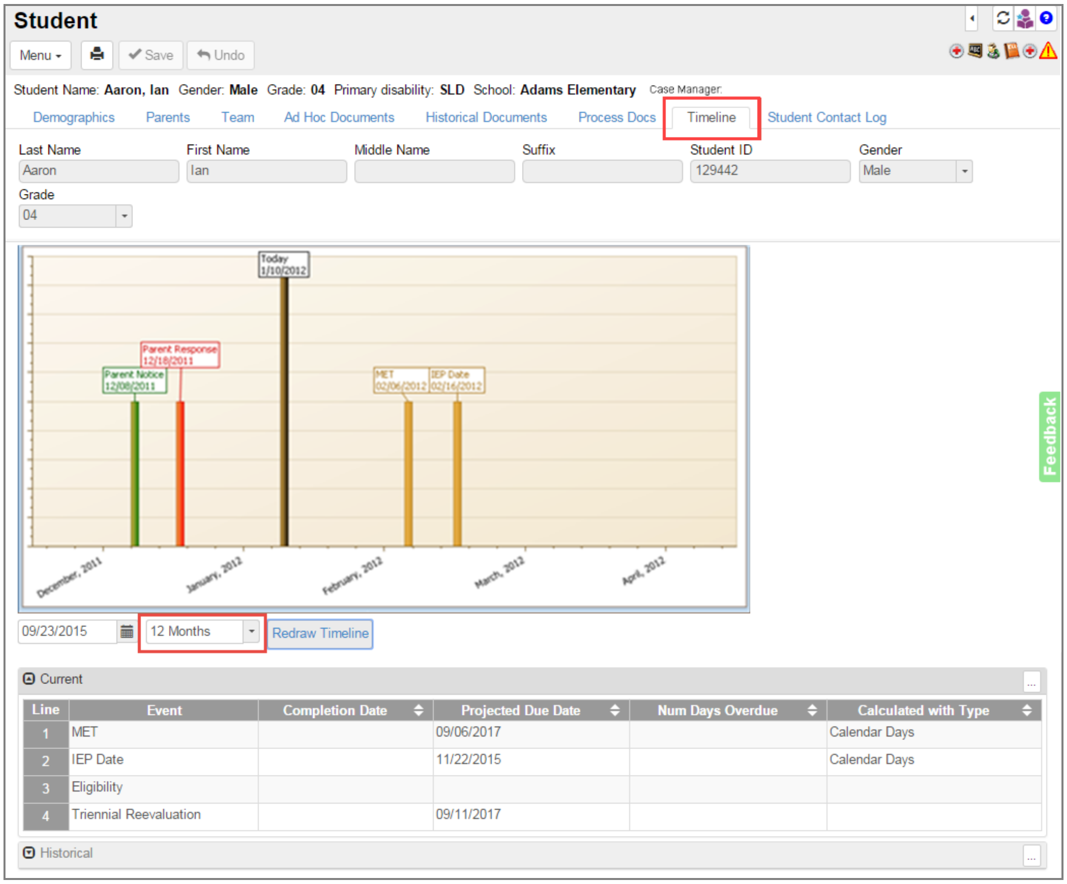
(SE) Student Screen, 504 Docs Tab

Timeline Tab

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

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

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

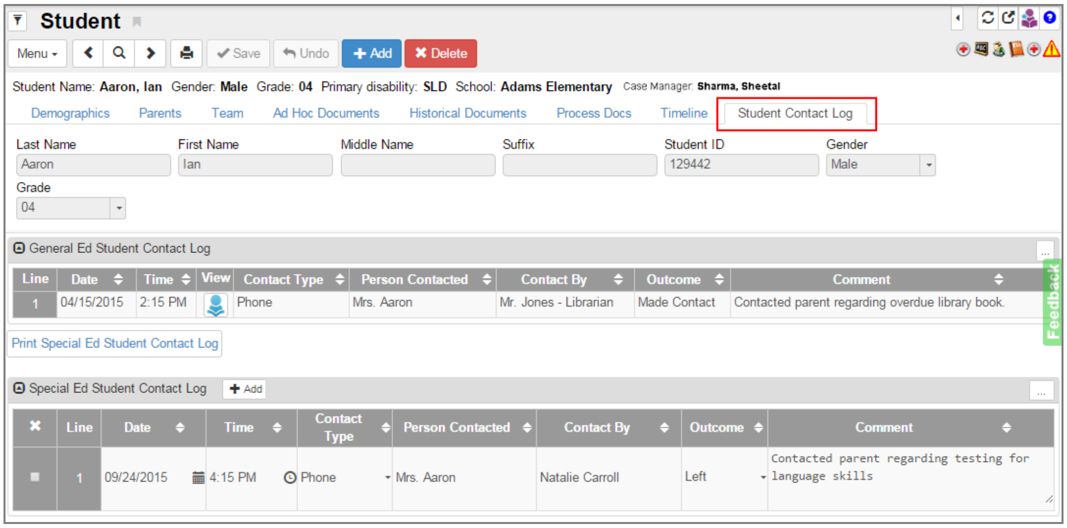


(SE) Student Screen, Timeline Tab

Student Contact Log

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

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



(SE) Student Screen, Student Contact Log Tab

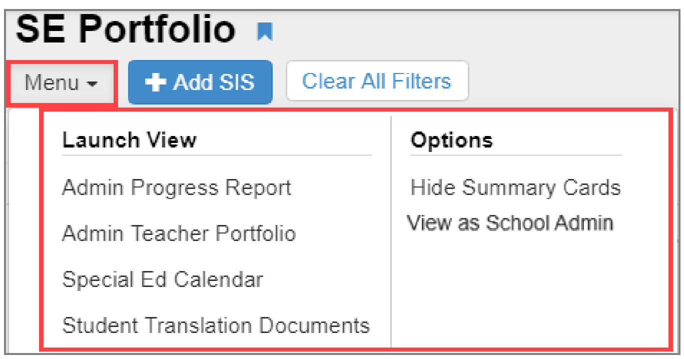
SE Portfolio Screen

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

> You must substitute the Portfolio screen with the SE Portfolio screen in PAD security to use it.

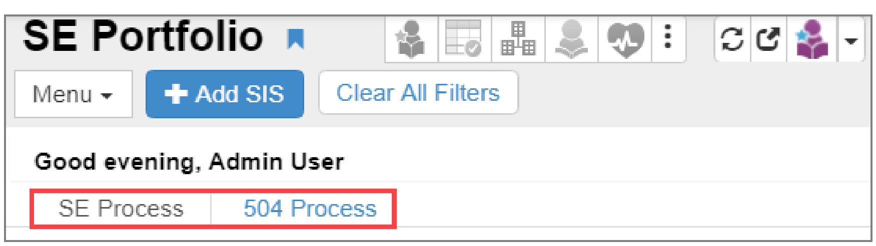
- The **Menu** on the SE Portfolio screen displays:
  - **Launch View**: Select *Admin Progress Report*, *Admin Teacher Portfolio*, *Special Ed Calendar*, or *Student Translation Documents* to launch the view.
  - Select an **Option**.
    - *Hide Summary Cards* – Hides the Summary Cards section and Graph bar on the Portfolio screen
    - *View as School Admin* – Displays a full list of SE/504 students in the user's Portfolio even if they are not part of the Student Team

> This option only displays for users who are focused to a school and who were set up to Exempt from Student Team in the User Setup.



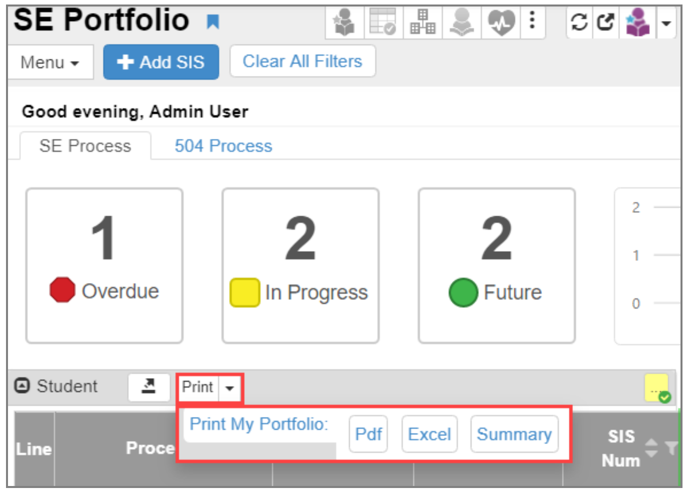
SE Portfolio Screen

- The Special Ed process and 504 processes have separate tabs to display each process individually.
  - **SE Process** – Displays the students in Special Ed processes
  - **504 Process** – Displays the students in 504 Processes



SE Portfolio Screen

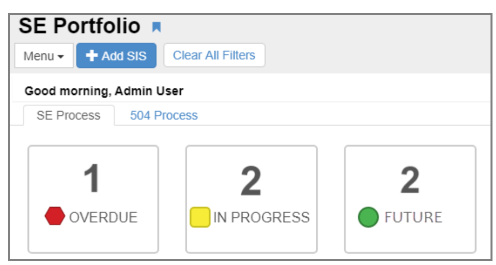
- Select **Pdf**, **Excel**, or **Summary** from **Print** to display the portfolio for the students as a printable document in PDF, Excel, or Graph Summary format.



SE Portfolio Screen

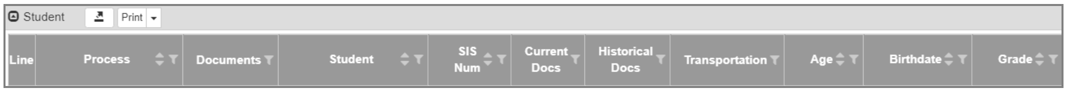
The following status labels and shapes display by default if no override options are selected for the labels and shapes:

- *Overdue*, red *Hexagon* – Indicates students who have an **Annual Review Date** or **Reevaluation Date** past the due date.
- *In Progress*, yellow *Square* – Indicates students with **Annual Review Dates** or **Reevaluation Dates** that fall in the district defined 'In Progress' time frame.
- *Future*, green *Circle* – Indicates students with **Annual Review Dates** or **Reevaluation Dates** that fall in the district defined 'Future' time frame.



SE Portfolio Screen

- The following columns display on the SE Portfolio screen:



Line	Process	Documents	Student	SIS Num	Current Docs	Historical Docs	Transportation	Age	Birthdate	Grade

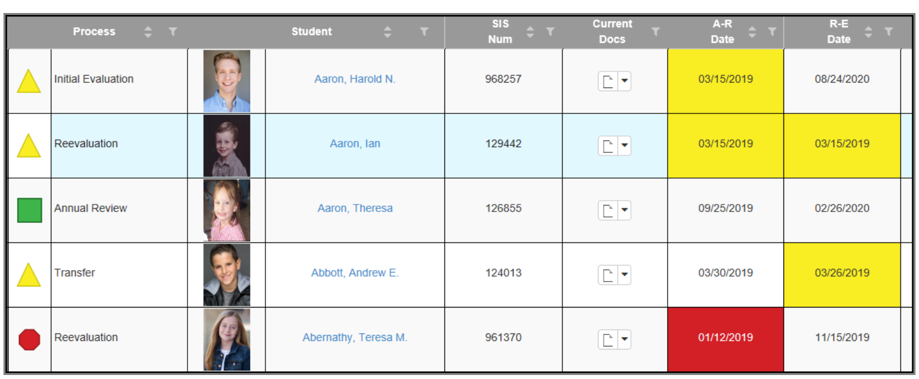
SE Portfolio Screen

  - **Process** – Displays the student's current Process
  - **Documents** – Displays the icon that contains all Process and Ad Hoc documents for the process the student is in
  - **Student** – Lists the student's name as a link. Click the link to open the Student screen.
  - **SIS Num** – Displays the student number
  - **Current Docs** – Quick link to a student's current (Finalized) IEP, Progress Report, Behavior Intervention Plan, and/or 504 Accommodation Plan
  - **Historical Docs** – Displays the icon. Click the icon to open the **Historical Documents** tab on the Student screen.
  - **Transportation** – Displays the icon. Click the icon to open the Student Transportation screen. The **Transportation** column displays only if the **Show Transportation** option is selected in Process Setup.
  - **Age** – Displays the student's age
  - **Birthdate** – Displays the student's birth date
  - **Grade** – Displays the student's grade

School	My Role	Disability	A-R Due Date	R-E Date

SE Portfolio Screen

  - **School** – Displays the student's school
  - **My Role** – Displays the role the user has as a Team Member. If Admin Team is used, this column displays Case Manager for each student.
  - **Disability** – Displays the student's disability
  - **A-R Due Date** – Color coded to show the status (upcoming, current, or overdue)
  - **R-E Date** – Color coded to show the status (upcoming, current, or overdue)

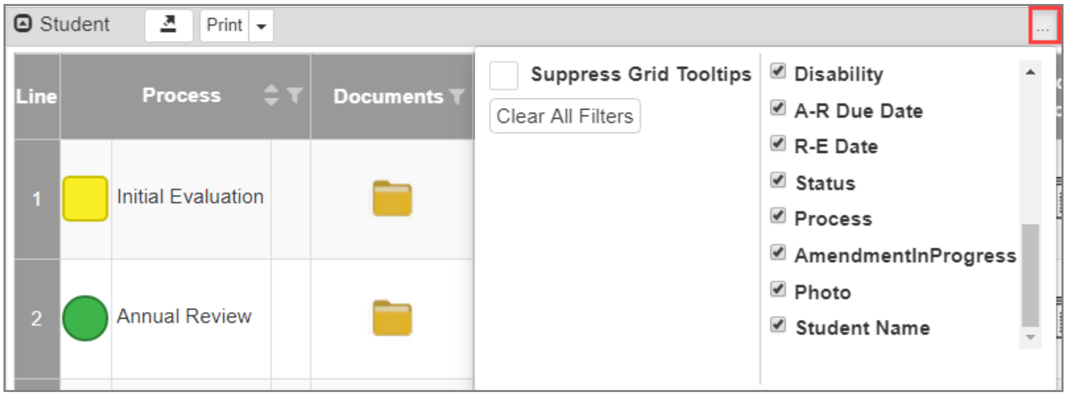


Process		Student	SIS Num	Current Docs	A-R Date	R-E Date
Initial Evaluation		Aaron, Harold N.	968257		03/15/2019	08/24/2020
Reevaluation		Aaron, Ian	129442		03/15/2019	03/15/2019
Annual Review		Aaron, Theresa	126855		09/25/2019	02/26/2020
Transfer		Abbott, Andrew E.	124013		03/30/2019	03/26/2019
Reevaluation		Abernathy, Teresa M.	961370		01/12/2019	11/15/2019

SE Portfolio Screen

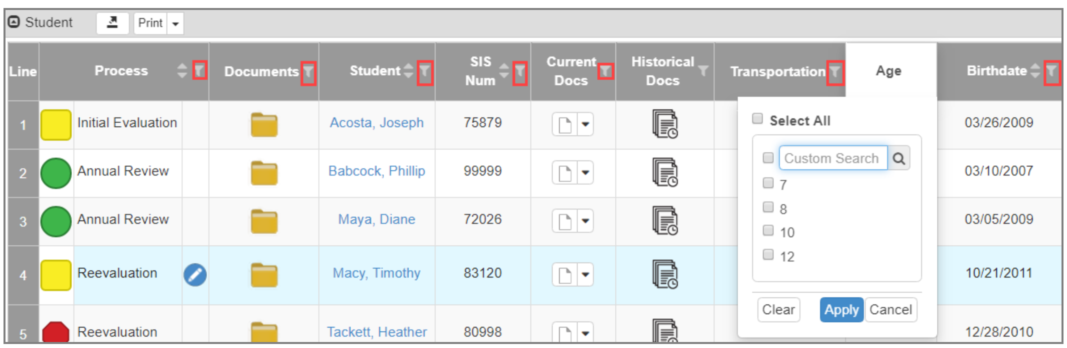
- Show/Hide columns by clicking ... and selecting the columns to display in the Student section.

> The selections are saved for each login.



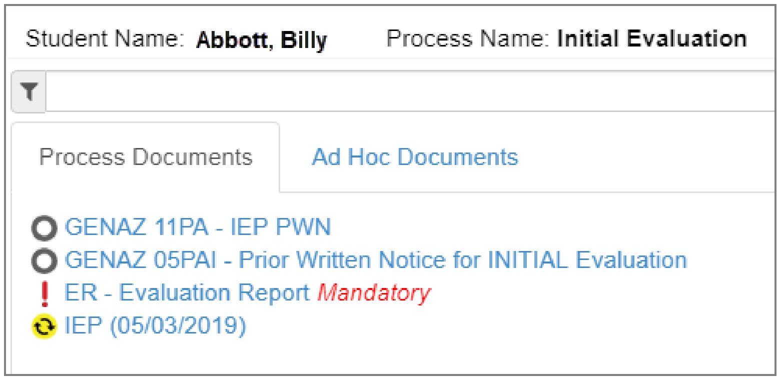
SE Portfolio Screen

- The Filter icon ( ) displays for the columns in the Student section to filter the student data.



SE Portfolio Screen

- All Process Documents and Ad Hoc Documents now display in the student's **Documents** folder. Click in the **Documents** column to display the documents in a new window.



Documents Window

The documents are color coded to represent the status.

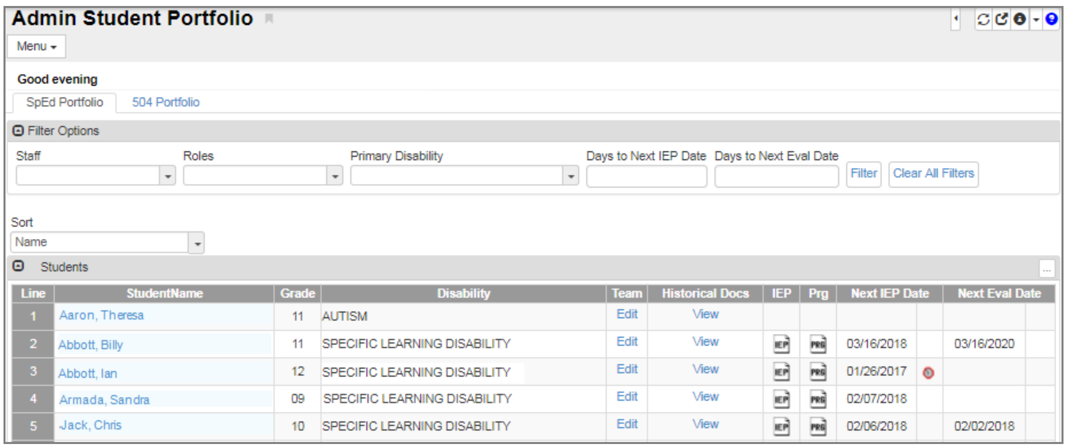
	= Not Started
	= In Progress
	= Finalized (Complete)
	= IEP Amendment

Mandatory displays for the document required in process.

Admin Student Portfolio Screen

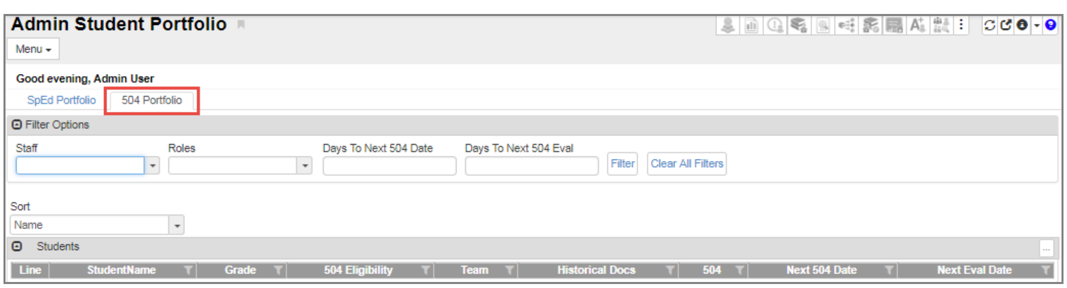
Access from **Synergy SE > NTL > Admin Student Portfolio**.

- Provides administrators or case managers the ability to view and manage upcoming events without being added to all student teams.
- The **SpEd Portfolio** tab:
  - Displays all students in special education for the current focus. You can filter this screen by **Staff**, **Roles**, **Primary Disability**, **Days to Next IEP Date**, or **Days to Next Eval Date**.
  - Displays the student's primary Disability, Team, Historical Documents, current IEP, Progress Report, and the **Next IEP Date** and **Next Eval Date**.
  -  displays to indicate the Next IEP Date or Next Eval Date is almost due.
  -  displays to indicate the Next IEP Date or Next Eval Date is overdue.



Admin Student Portfolio Screen

- The **504 Portfolio** tab:
  - Displays all students in special education for the current focus. You can filter this screen by **Staff**, **Roles**, **Days to Next 504 Date**, or **Days to Next 504 Eval**.
  - Displays the student's 504 Eligibility, Team, Historical Documents, current 504, Progress Report, the **Next 504 Date**, and **Next Eval Date**.

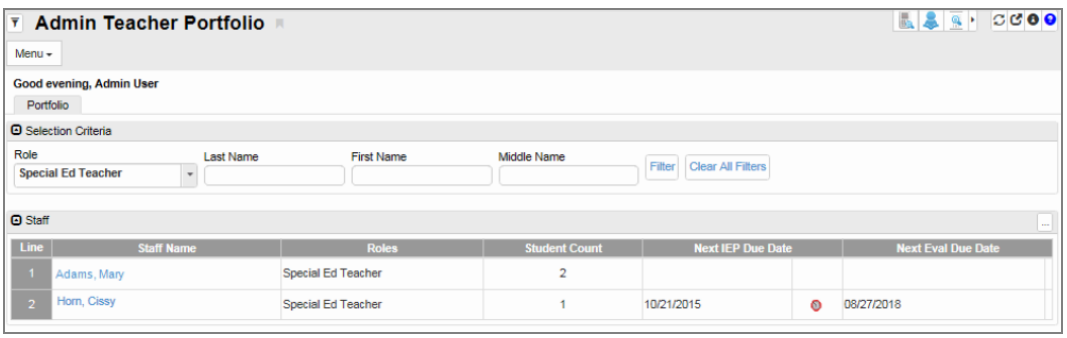


Admin Student Portfolio Screen, 504 Portfolio Tab

Admin Teacher Portfolio Screen

Access from **Synergy SE > NTL > Admin Teacher Portfolio**.

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



Admin Teacher Portfolio Screen

Adding Students From Synergy SIS

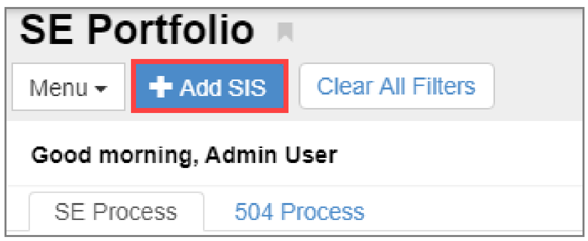
Your Portfolio displays all students for which you are a Team Member. Use the SE Portfolio screen to import a new or referred student from Synergy SIS and set up their team.

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

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

> You can also add students from the **Synergy SE > Student > Student** screen using the **Add** button.

2. Click **Add SIS**.

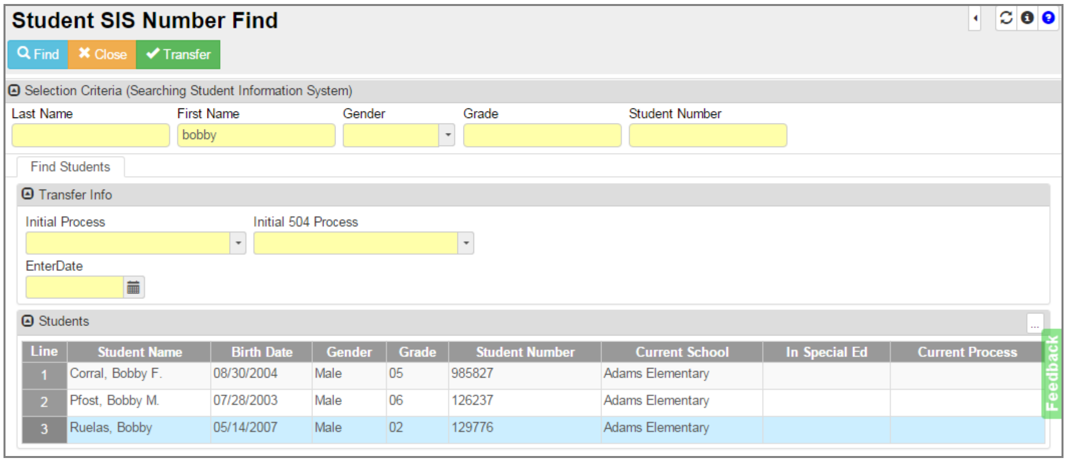


SE Portfolio Screen

3. Locate the student.
   - Specify the **Initial Process** for the student.
   - Select the **Enter Date** using .

> Synergy SE returns only the first 50 students who match your search criteria. Use a partial last name with a partial first name as a search combination if the student does not display in the search.
>
> Students with a status of **Yes** in the In Special Ed column cannot be added.

4. Click **Transfer**.



Student SIS Number Find Screen

5. Click **OK**.

Adding a Current Synergy SE Student to Your Portfolio

You must be added to the student's Team tab to add a current Special Ed student to your Portfolio.

The student displays in your Portfolio the next time you log in to Synergy SE if anotherTeam Member added you to the student's Team.

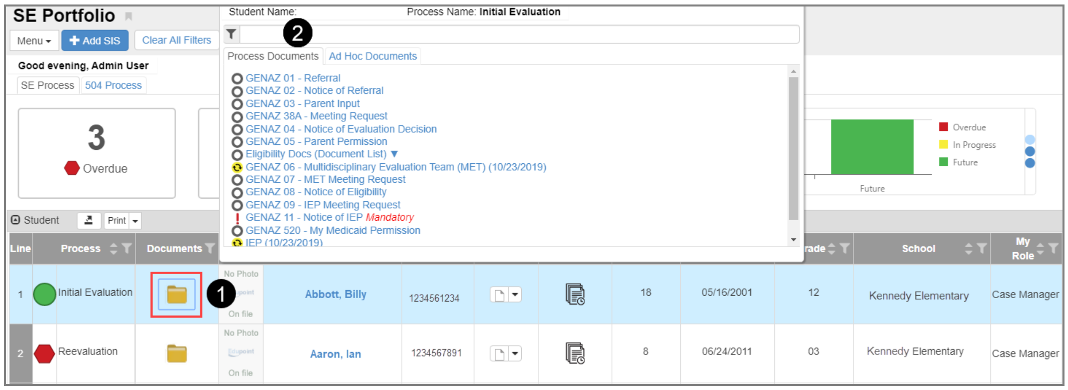
Contact the Synergy SE Help Desk for assistance if the student cannot be located.

Accessing and Editing Student Data and Information

- Process Documents and Ad Hoc Documents

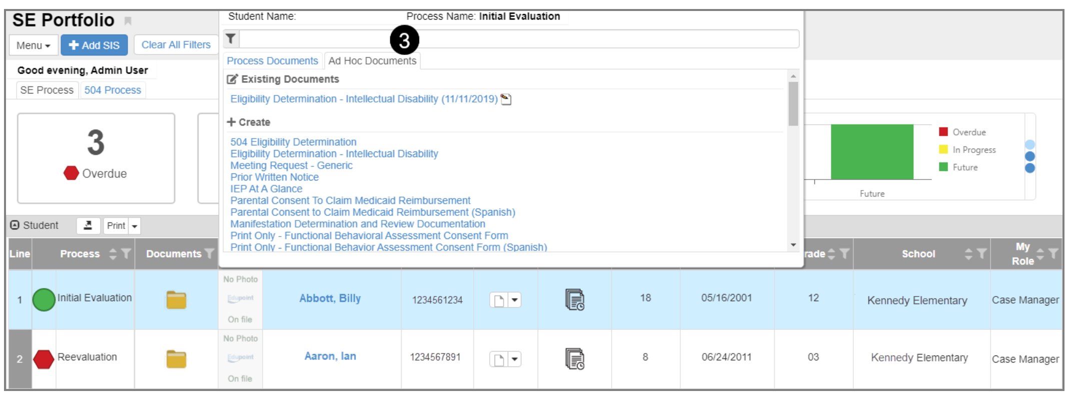
  a. Click [folder icon] in the **Documents** column to open a new window. ❶

  b. Select a document from the **Process Documents** tab. ❷



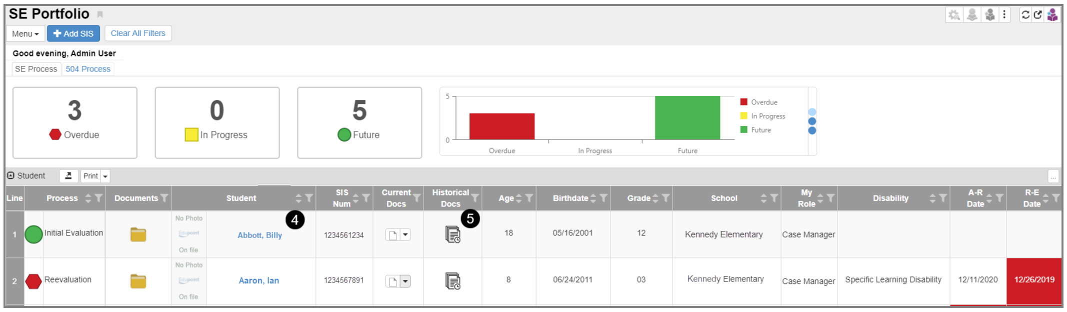
SE Portfolio Screen

  c. Select the **Ad Hoc Documents** tab and select a document. ❸



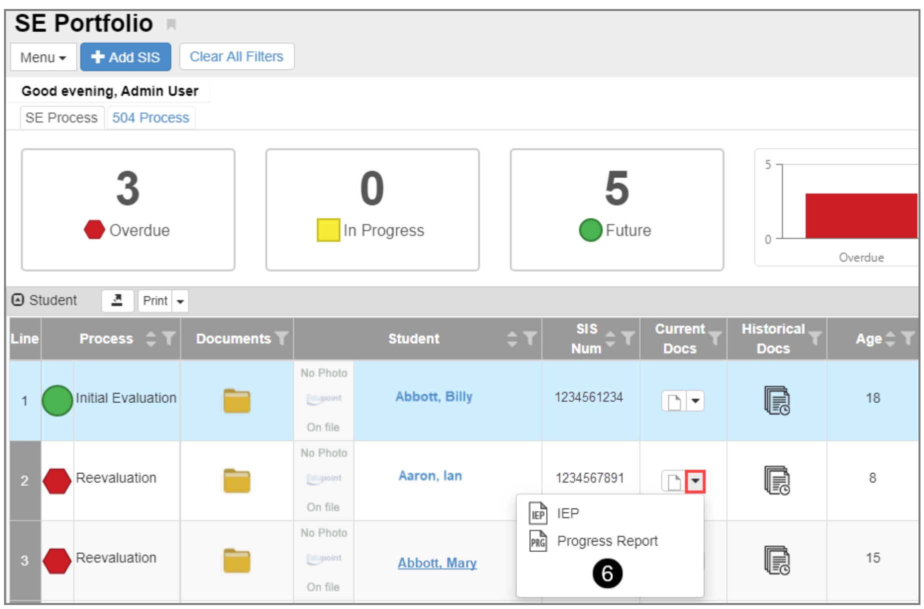
SE Portfolio Screen

- Select the student's name to view/edit demographic data. ❹
- Click to view Historical Documents. ❺



SE Portfolio Screen

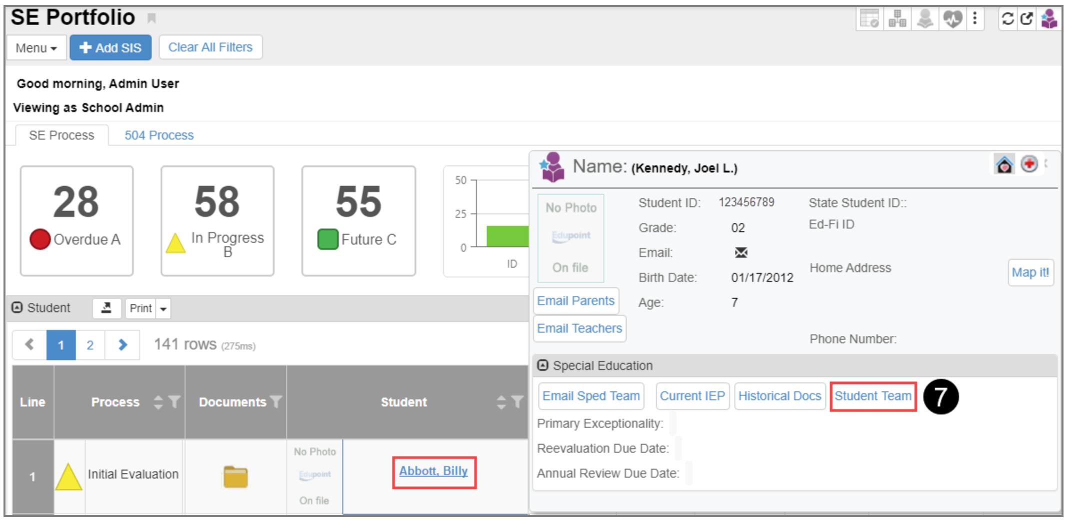
- IEP and Progress Report
  a. Click the drop-down in the **Current Docs** column and select *IEP* to view the IEP (Individualized Education Program) document. ❻
  b. Click the drop-down in the **Current Docs** column and select *Progress Report* to view the student's Progress Report. ❻



SE Portfolio Screen

- Hover over the student name and click **Student Team** to open the **Team** tab on the Student screen. ❼

> Editing student data is based on your security level.
>
> Removing yourself from the Team removes the student from your Portfolio.



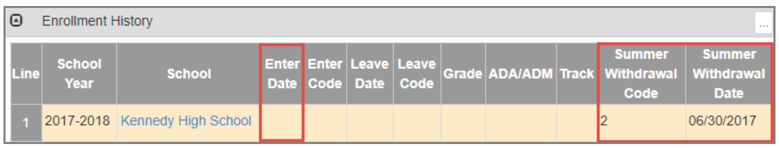
SE Portfolio Screen

Viewing "No Showed" in Synergy SE

You district may allow you to view students who were no-showed (did not attend school) or concurrently enrolled at another school.

1. Navigate to a **Synergy SE > Student > Student**.
2. Locate a student who was previously in SE, but a "No Show" for the current **School Year**.
3. Select the **Enrollment History** tab.

> The enrollment does not have an **Enter Date** and has **Summer Withdrawal** information.

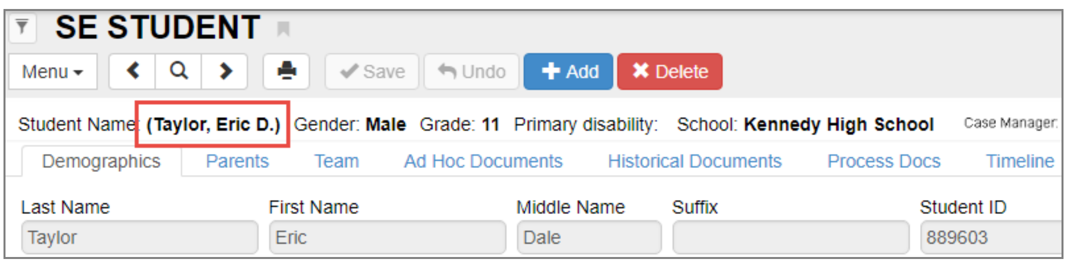


Enrollment History

Line	School Year	School	Enter Date	Enter Code	Leave Date	Leave Code	Grade	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2017-2018	Kennedy High School								2	06/30/2017

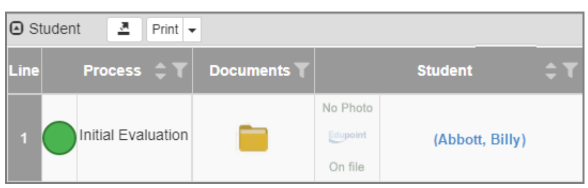
Student Screen, Enrollment History Tab

4. Focus to the last school in the student's Enrollment History.
   - The student displays with parentheses around the **Student Name** on the Student screen.



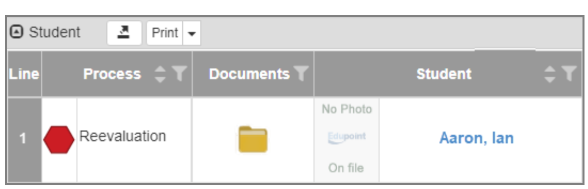
SE Student Screen

   - The student displays with parentheses around their name on the SE Portfolio screen of Team staff.



SE Portfolio Screen

> The student does not display if focused to the district.



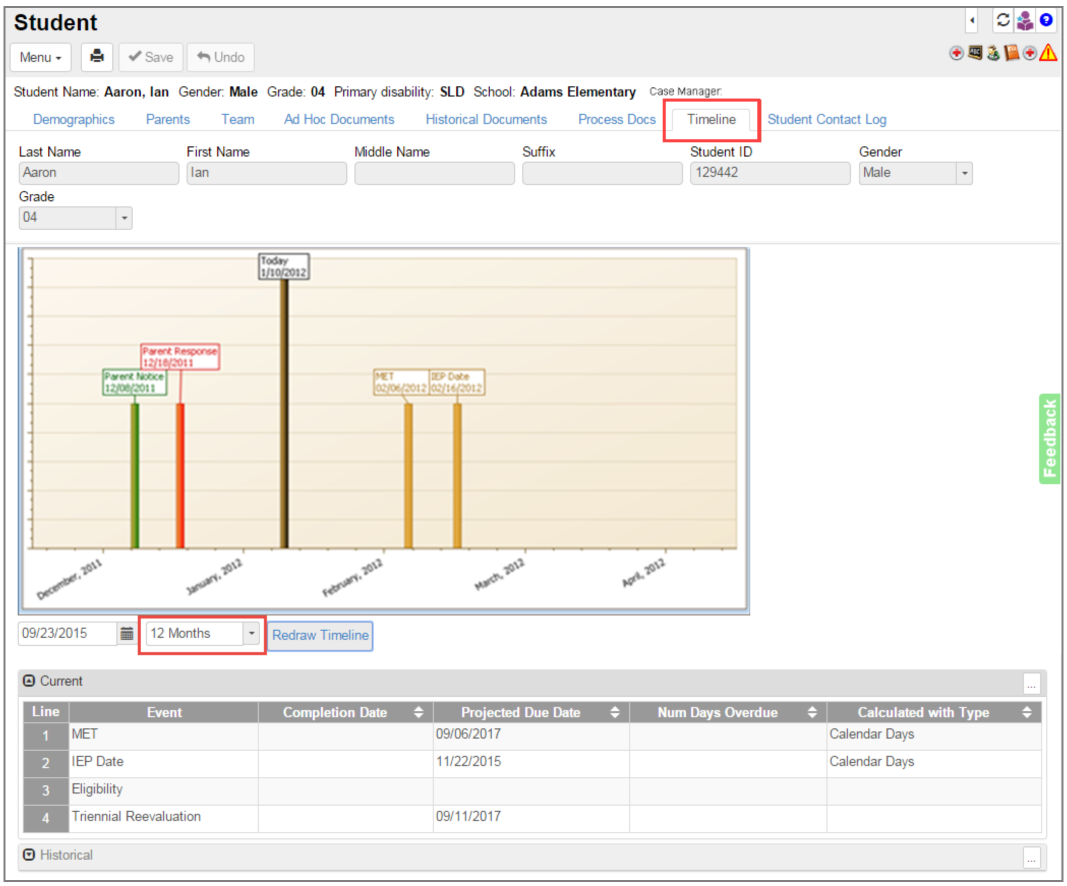
SE Portfolio Screen

Viewing a Student’s Timeline

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

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

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

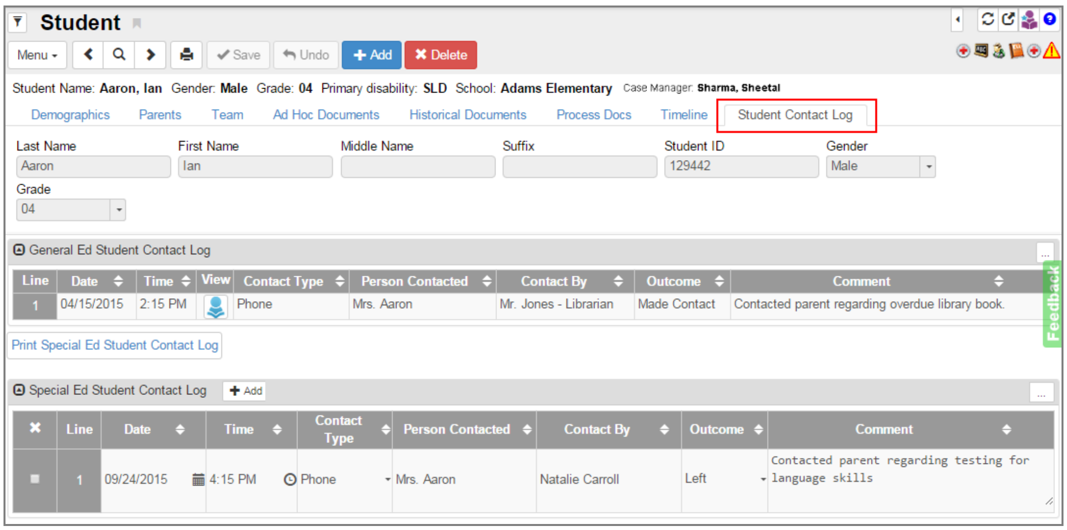


(SE) Student Screen, Timeline Tab

Student Contact Log

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

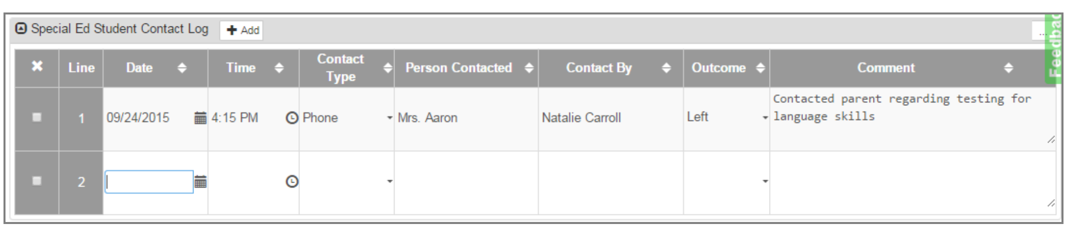
- The General Ed Student Contact Log section which contains entries from Synergy SIS is read only.
- Special Eduction Team members can record entries in the Special Ed Student Contact Log section. These contacts with the student are not visible in Synergy SIS.



(SE) Student Screen, Student Contact Log Tab

Creating a Log Entry

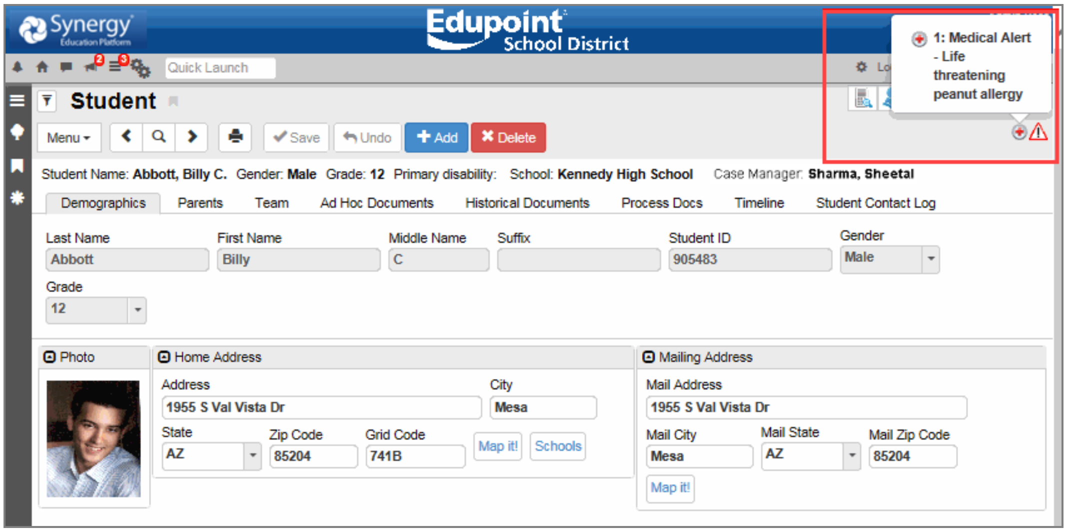
1. Click **Add** in the Special Ed Student Contact Log section to create a new line.
2. Complete the fields.
3. Click **Save**.



(SE) Student Screen, Student Contact Log Tab

Student Notifications

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



(SE) Student Screen

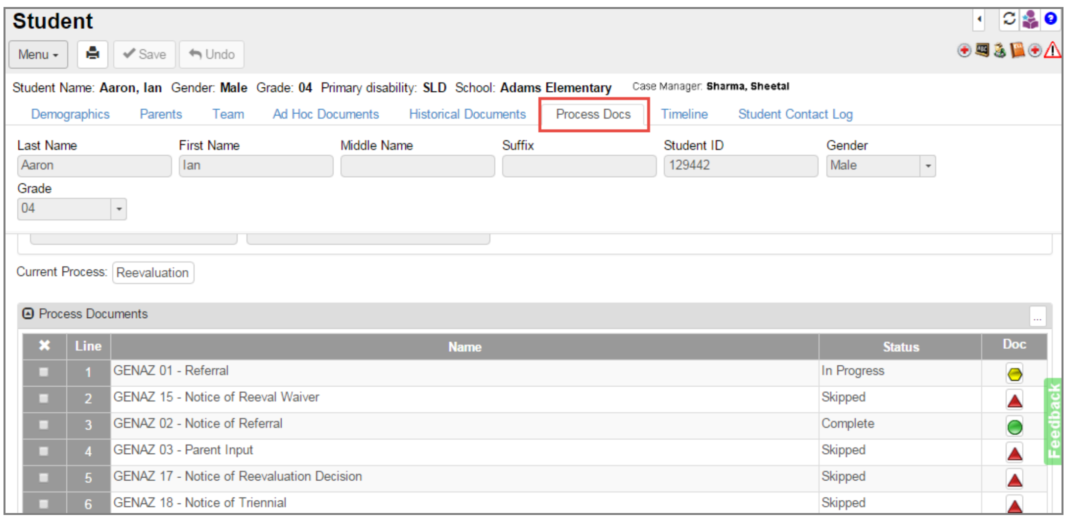
Manually Moving a Student to Another Process

You can manually move a student to another process if your access level rights allow.

> Your district can restrict the movement of a student between a SpEd Process and 504 Process in a concurrent process district.

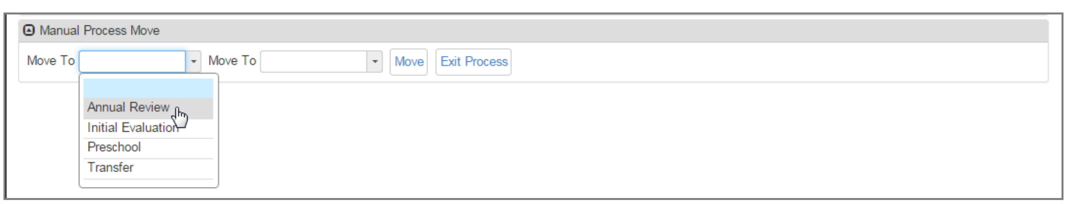
1. Click a **Student** name link on the SE Portfolio screen.
2. Select the tab that contains your process documents (**Process Docs**, **SpED Docs**, or **504 Docs**).
3. Finalize or delete any in-process documents.

> In-process documents are indicated by .



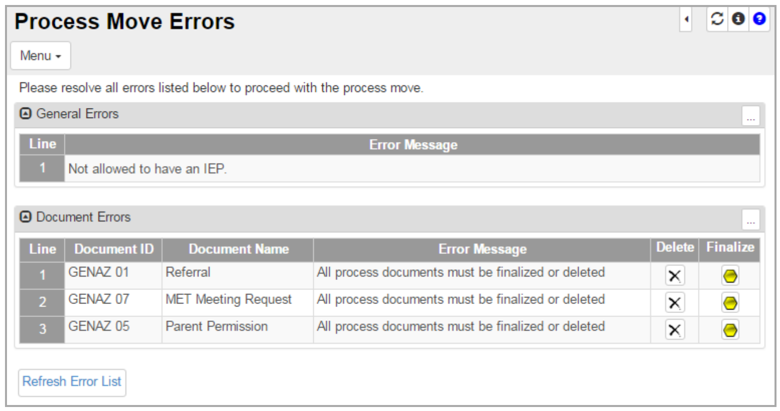
(SE) Student Screen

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



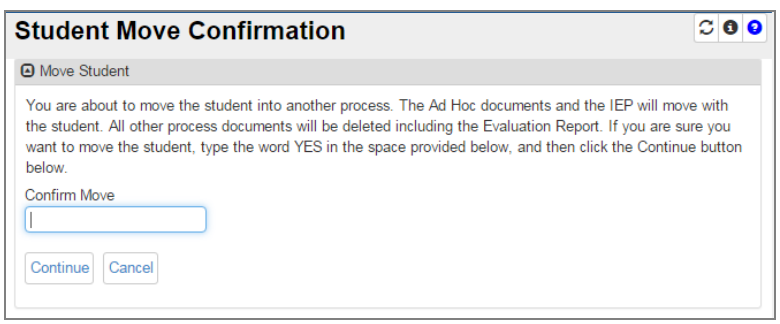
(SE) Student Screen

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



Process Move Errors Screen

6. Type *YES* to **Confirm Move**.
7. Click **Continue**. The student moves to the new process in the Portfolio.



Student Move Confirmation

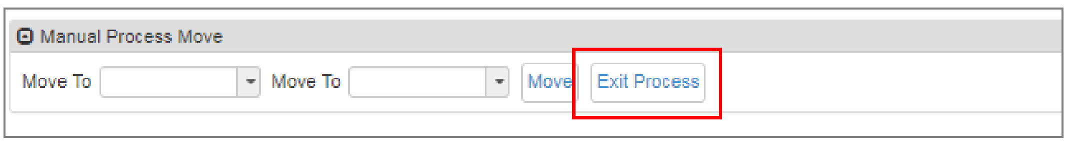
Exiting a Student from Special Education

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

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

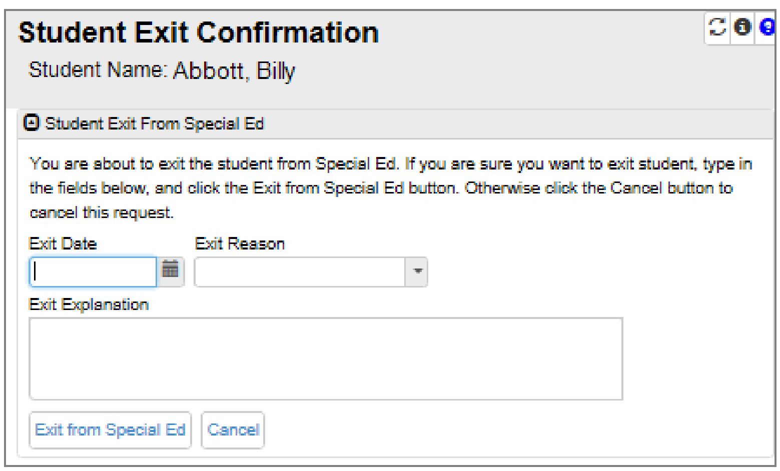
For districts using concurrent processes, the **Next IEP Date, Next Evaluation Date**, and the Disabilities remain on the **SpEd Docs** tab if a student, who is also in a SpEd Process, exits a 504 Process from the **504 Docs** tab.

1. Locate the student.
2. Select the **Process** tab.
3. Click **Exit Process** in the Manual Process Move section.



(SE) Student Screen, Process Tab

The Student Exit Confirmation dialog displays.



Student Exit Confirmation Screen

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

Student Team List

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

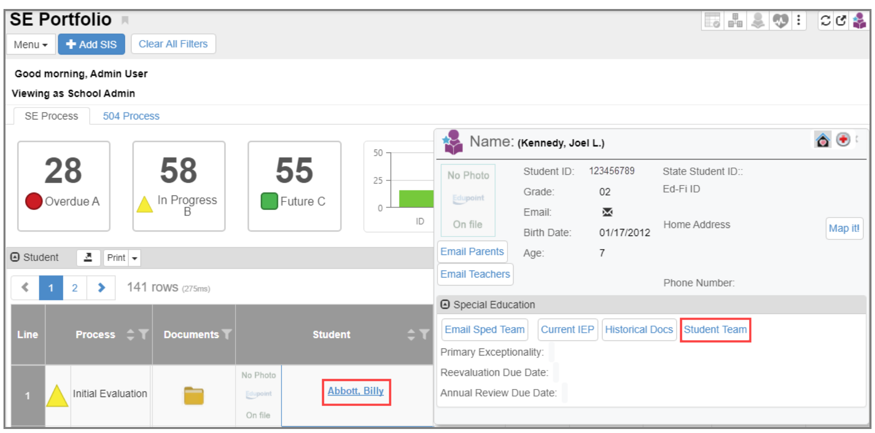
- They can have multiple roles assigned if they have a role other than Case Manager assigned on the default student team.
- They have the first alphabetically assigned Case Manager role assigned if they have multiple Case Manager roles assigned to them. This includes 504 Process Case Manager roles.

Adding a Team Member

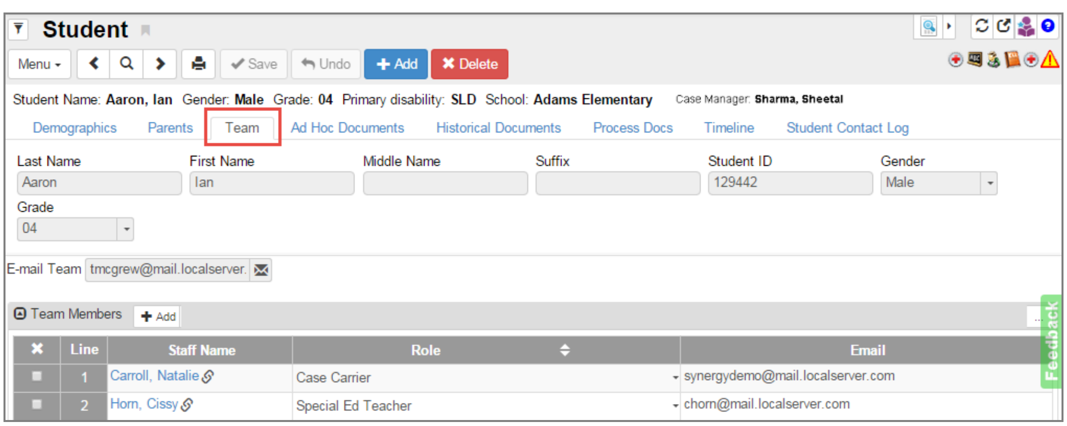
> Normally a team member must be assigned to the student's school. Some districts can add staff that are not assigned to the school.

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

1. Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
    - Hover over the student name on the SE Portfolio screen.
    - Click **Student Team** in the snapshot to open the **Team** tab on the Student screen.

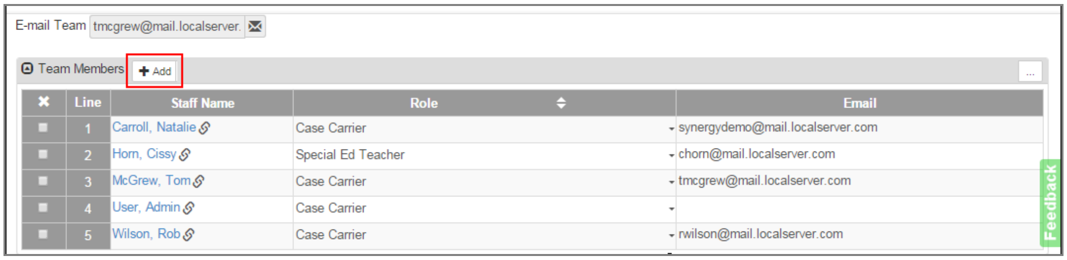


SE Portfolio Screen



(SE) Student Screen, Team Tab

2. Click **Add** in the Team Members section to open the Staff Search window.



(SE) Student Screen, Team Tab

3. Locate the staff member.

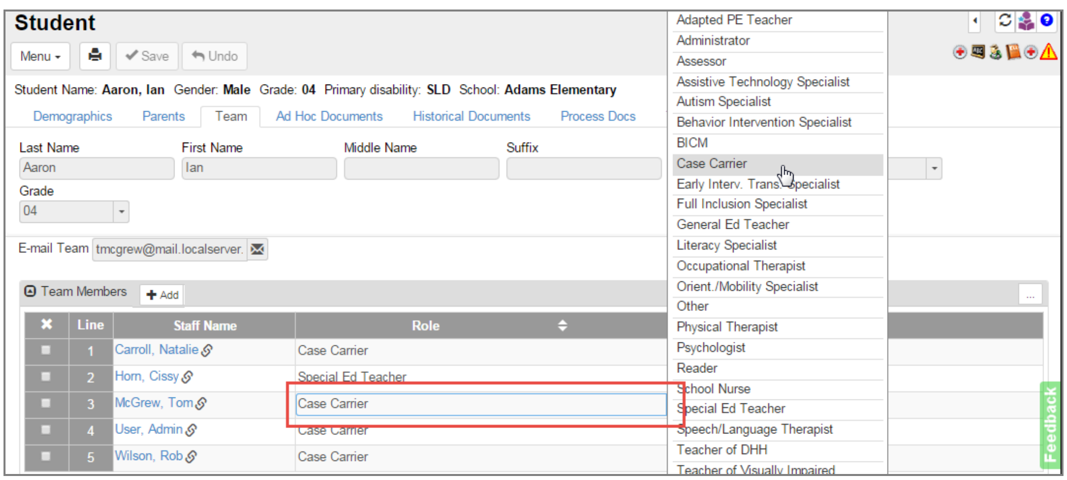
> Enter minimal criteria when doing a search. For example, enter the last name and their first name initial.

4. Click **Save**.

Changing the Role of a Team Member

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

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



(SE) Student Screen, Team Tab

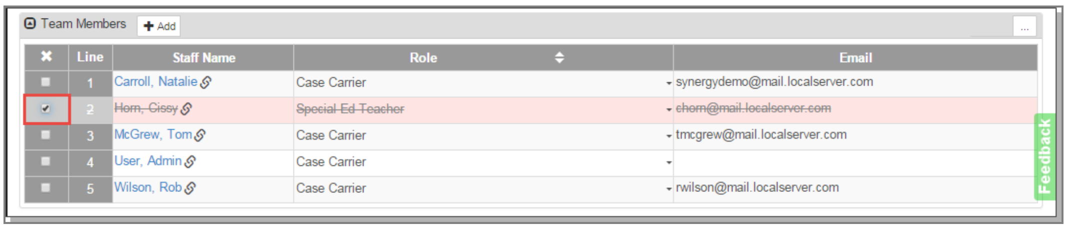
4. Click **Save**.

Deleting a Team Member

> Each student must always have one assigned Case Manager. You cannot delete the initial Case Manager assigned to a student until you add a new Case Manager.
>
> The student record does not display on your Portfolio if you are the previous Case Manager and you are assigning the new Case Manager or when you delete yourself from the Team.
>
> You must be reassigned to the student's Team to access the student from the Student screen.

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

1. Navigate to **Synergy SE > Student > Portfolio** or **Synergy SE > Student > Student**.
2. Select **X** in the Team Member's record row in the Team Members section.



(SE) Student Screen, Team Tab

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

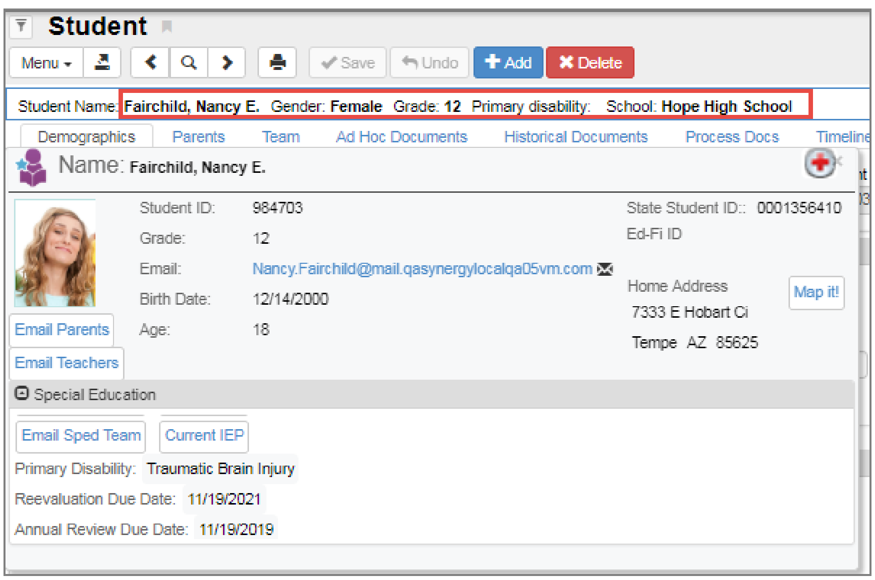
Snapshot Views

The Snapshot Views feature in Synergy SE displays a snapshot of data when you hover over a student's name. Your system administrator must enable and configure snapshot views for them to display. The **Options** menu in Synergy SE allows you to enable or disable snapshot views once your system administrator has enabled them.

> Closing the Snapshot View by clicking the **X** in the corner resets the cursor position on the screen. The cursor position does not change if you move the mouse pointer away from the window instead.

Student

You can view the Student Snapshot by hovering over a **Student Name** field or by hovering over the student name title on any student based screen. The following example uses the Synergy SE Student screen.



(SE) Student Screen

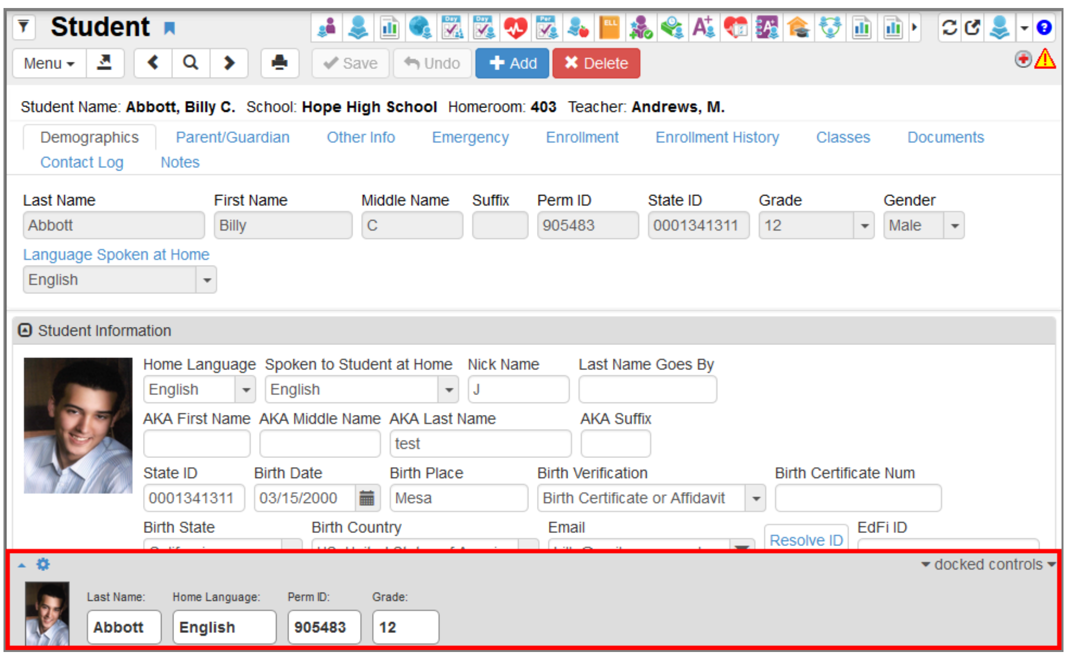
The SE Student Snapshot provides the following information on the student where available:

- **Last Name** and **First Name**
- **Medical**, **Discipline**, **Special Education**, **Student Programs**, and **Custody** alerts
- **Student Photo** on file
- **Perm ID**, **Grade**, **Email**, **Birth Date**, **Age**, **State ID**, **Ed-Fi ID**, **Home Address** and Special Education information such as the Primary Disability and access to the Current IEP

Synergy Docking Panel

You can add fields to the Docking Panel area at the bottom of Synergy SIS screens. You can easily view frequently used information across all screens and tabs associated with students, staff, or sections. It also supports the configuration of multiple panels based on the screen you are viewing.

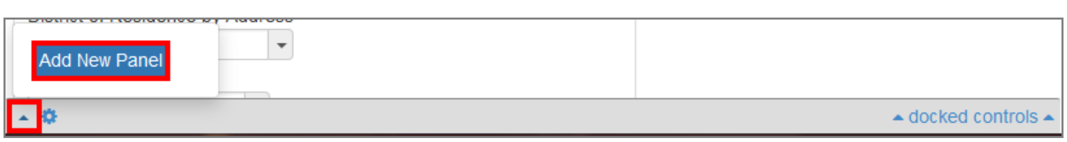
> You cannot dock grid elements.
>
> You cannot dock fields that use a link to find and select information, such as the **Course ID** and **Course Title** fields at **Synergy SIS > Schedule > Section**.
>
> Properties that have a *One to Many* relationship cannot share panels. For example, courses can have multiple sections but a section can only have one course associated with it. Therefore, you cannot display the Course and Section properties in the same panel.
>
> Docking Panels are restricted to the users who created them.



Student Screen, Docking Panel

Managing Docking Panels

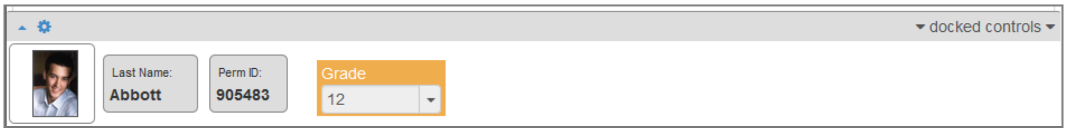
1. Click the arrow on the bottom left of the screen.
2. Click **Add New Panel**.



Docking Panel

3. Hold the **Ctrl** key to click and drag fields to the panel. This outlines the fields in orange.
   - Click and drag the fields within the panel to change their order.
   - Click the **X** in the field to remove it from the panel.

> You can also click in the field or on the field name and hold until the field is outlined, then drag it to the panel.



Docking Panel

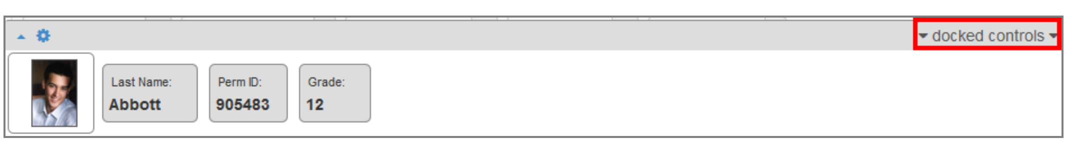
4. Select a different docking panel by clicking the arrow on the bottom left of the screen and choosing the panel to view.

Docking Panel

5. Click the **X** on the far right of the panel to delete a docking panel.

Docking Panel

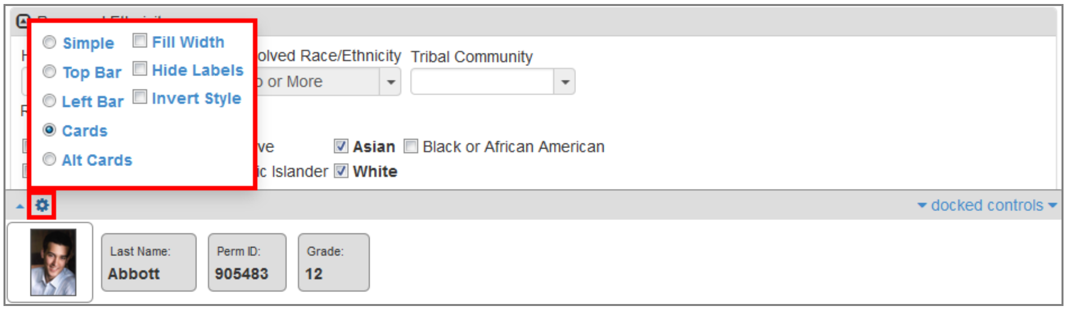
6. Click **Docked Controls** in the bottom right to show or hide a panel.
   - When expanded, the selected panel is visible as the user moves between records.
   - When collapsed, the selected panel is hidden.



Docking Panel

Docking Panel Options

Click the **Options** icon in the bottom left of the panel to select display options and styles.

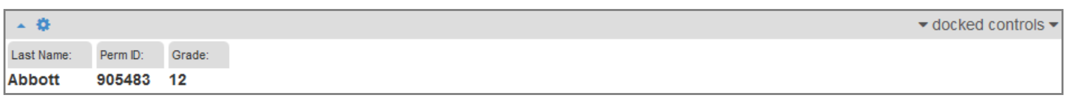


Docking Panel

- **Simple** – Removes the tabs from view. This can also include the field label name.

Data Docking, Simple

- **Top Bar** – A tab displays on the top of the item added to the panel. This can also include the field label name.

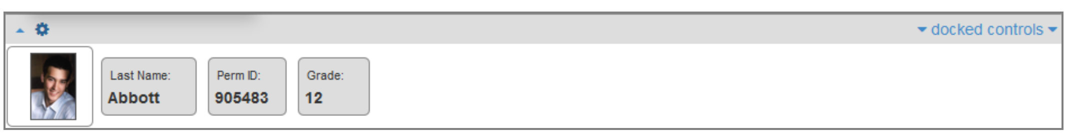


Docking Panel, Top Bar

- **Left Bar** – A tab displays to the left of the field added to the panel. This can also include the field label name.

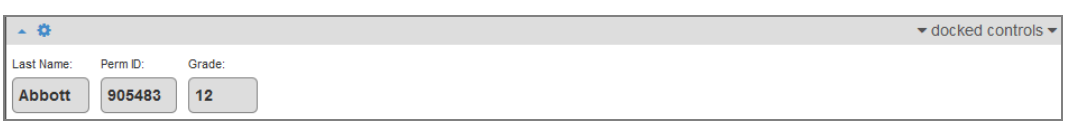
Docking Panel, Left Bar

- **Cards** – Selecting this presents field label names and data in a tile format.



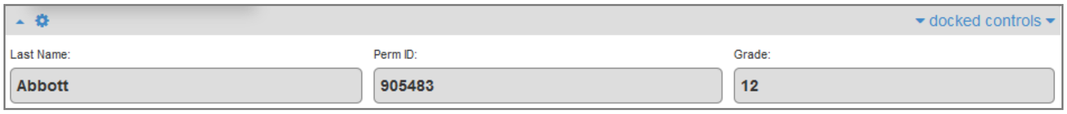
Docking Panel, Cards

- **Alt Cards** – Selecting this presents the field data in a tile format with the field label names outside the tile.



Docking Panel, Alt Cards

- **Fill Width** – Selecting this attempts to fill the width of the panel with the available selections.



Docking Panel, Fill Width

- **Hide Labels** – Selecting this removes the label name from view.

Docking Panel, Labels Hidden

- **Invert Style** – Selecting this uses the Synergy Header Background color as the Panel Background color and uses the Synergy Background color as the card or tab color.

When using High Contrast, disabling Invert Style presents the tiles or tabs on a white background, regardless of color chosen in Synergy Options. This indicates a contrast between the panel and the screen in focus.

Docking Panel, Invert Style, High Contrast

Docking Panel, High Contrast

Using Docking Panel in Synergy SE and Synergy SIS

Clients who only have access to Synergy SE can ignore these rules.

The following rules must be followed when using the Docking Panel in Synergy SE if you have access to both Synergy SE and Synergy SIS.

These rules also apply to user-defined fields.

- If docking a field used by both theSynergy SIS and Synergy SE Student screens, drag the field from the Synergy SIS Student screen and not the Synergy SE screen.
- If using a field from a screen that Synergy SE does not have access to, you must also add a field from the Synergy SIS Student screen.

Examples of fields that do not change are **First Name**, **Gender**, **Birth Date** on the Synergy SIS Student screen.

- If using a field that changes from year-to-year, you must add a field that can change from year-to-year.

Examples of fields that change from year-to-year, **Grade** or a field in the Enrollment Activity section of the **Enrollment** tab on the Synergy SIS Student screen.

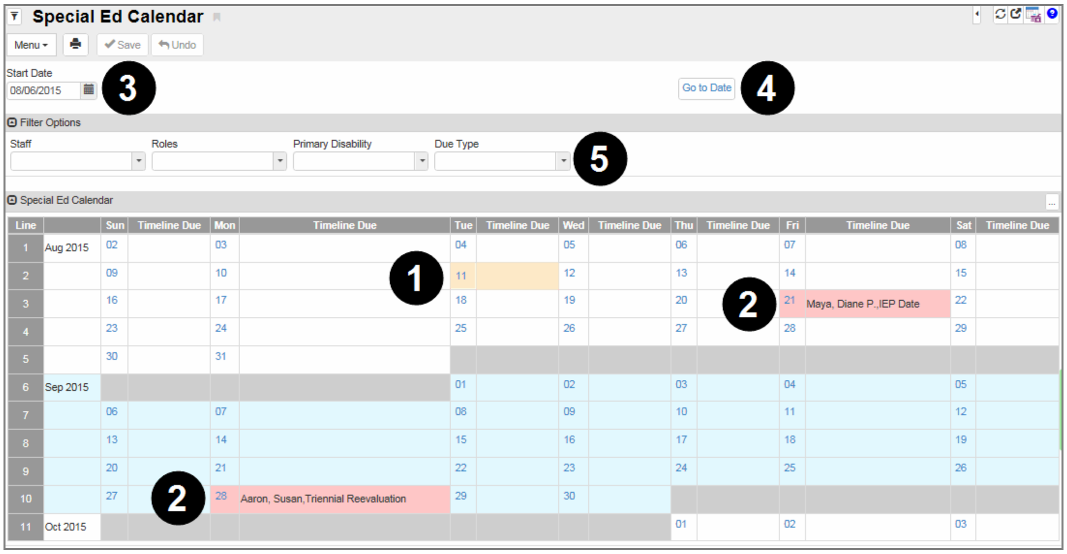
Special Ed Calendar

The Special Ed Calendar screen displays information from School Calendar and student timeline events. The screen defaults to the current week.

- Timelines for all students display in the calendar if the user is focused to all schools and is exempt from student team.
- Timelines for the students belonging the user’s team for that particular focus display in the calendar if the user is focused to a school and belongs to student teams.

Using the Calendar

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



Special Ed Calendar Screen

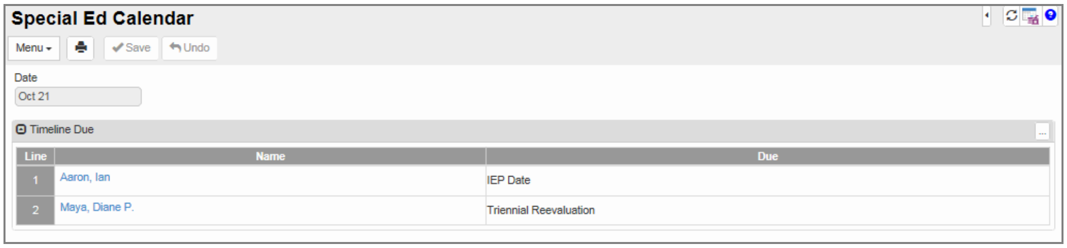
- To display a different date:
  1. Select a **Start Date** ❸ using the calendar icon to display different dates.
  2. Click **Go to Date** ❹ to display the selected dates in the calendar.
- To customize the information displayed on the calendar, use the Filter Options. ❺

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

  - **Staff** – Select to only display students who have that staff member as part of their team.
  - **Roles –** Select to only display students that have a team member with the role.
  - **Primary Disability** – Select to only display students that have the selected primary disability.
  - **Due Type** – Select to only display students and their events with that due type.

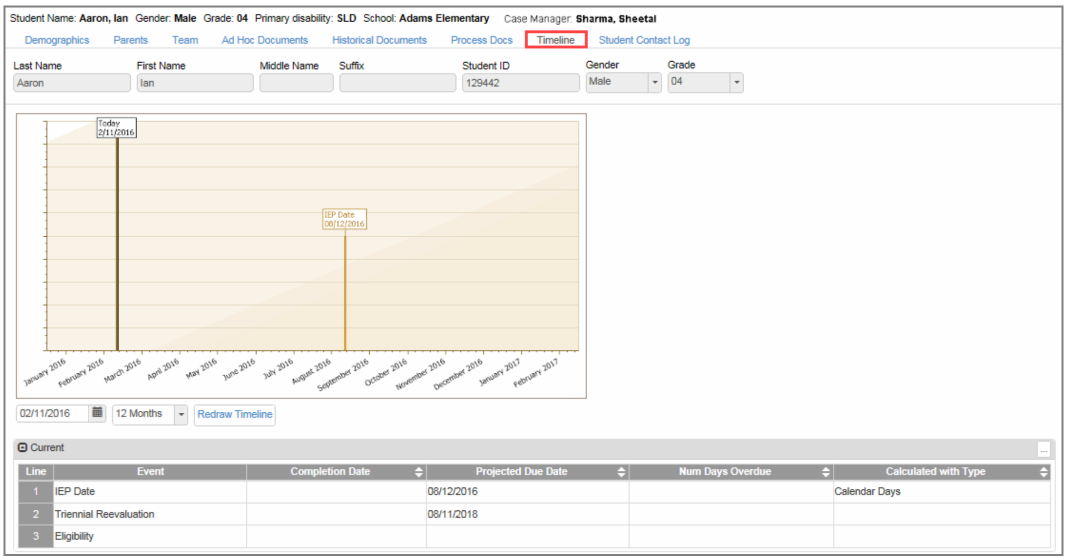
- To view the Timelines Due for a day:

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



Special Ed Calendar Screen

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



Student Screen, Timeline Tab

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

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

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

Assigning Medicaid Services to Students

Not all districts use the Medicaid module.

Logging Medicaid Services for a Student as a Provider

The Medicaid Provider screen provides the user with a Student List. Access.

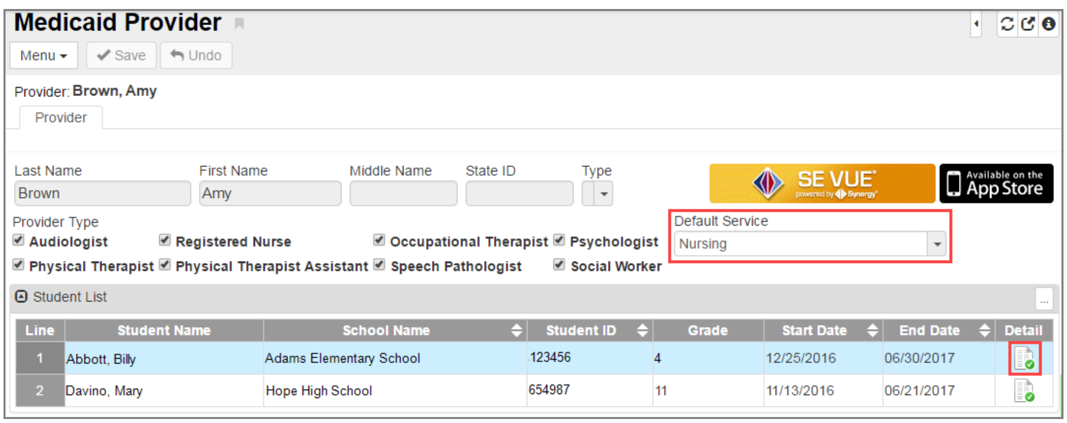
1. Navigate to **Synergy SE > NTL > Medicaid > Medicaid Provider**.
2. Select the **Default Service** to automatically populate all rows with a Service on the Provider Student screen.

   The administrator can select the **Default Service** for you.

   You can change the **Default Service**.

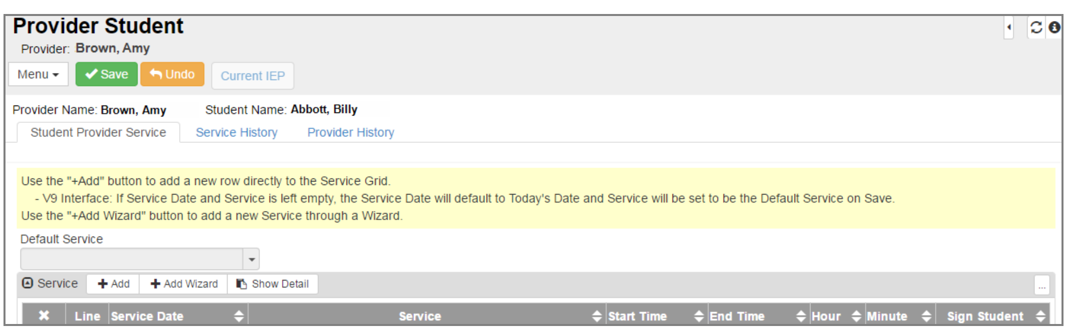
   You can change the **Service** in the Service section.

3. Click for the student in the **Detail** column in the Student List section to open the Provider Student screen.



Medicaid Provider Screen

4. Add a service.



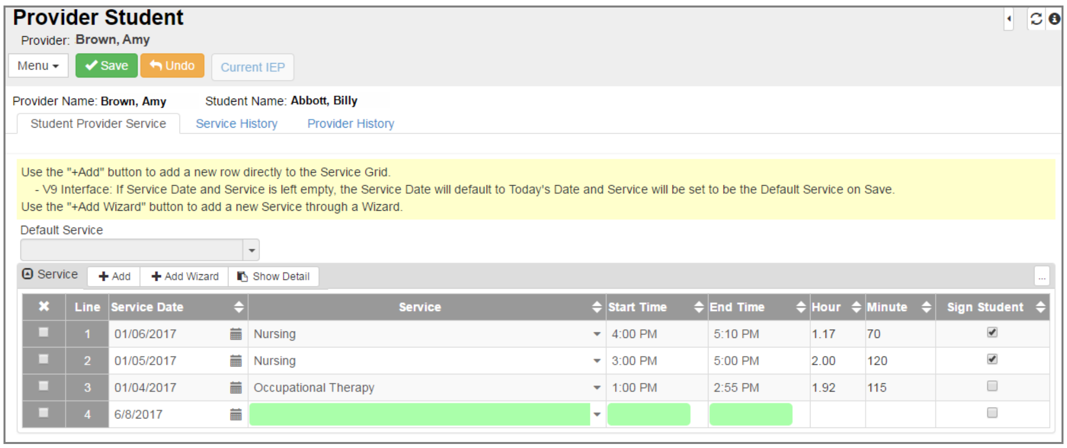
Provider Student Screen

Using Add

1. Click **Add** in the Service section to add a new line.
2. Select a **Service** if a default service does not display.

> Modify the service if needed.

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



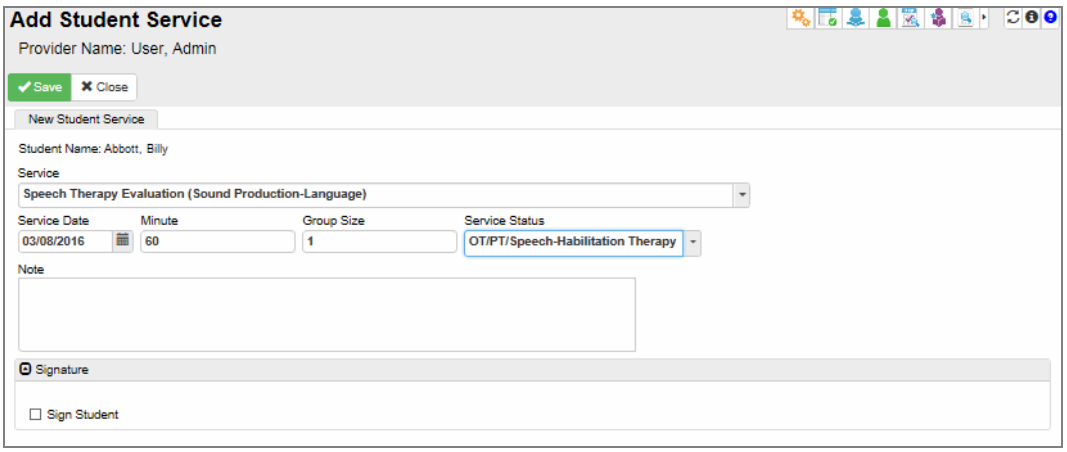
Provider Student Screen

5. Click **Save**.

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

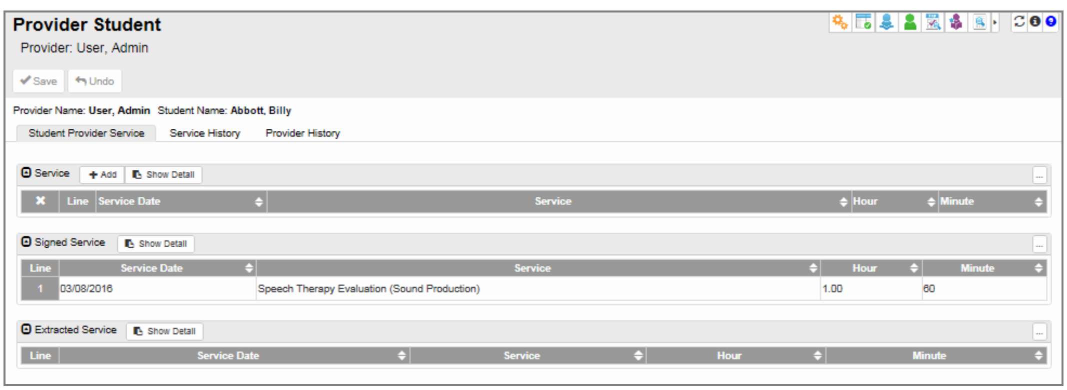
Using Add Wizard

1. Click **Add Wizard** in the Service section to open the Add Student Service screen.
2. Select the **Service**.
3. Select a **Service Date**.
4. Enter a **Start Time** and **End Time**.
5. Select a **Service Status**.
6. Enter a **Note**.
7. Select the **Sign Student** option when the service is completed and may be billed.



Add Student Service Screen

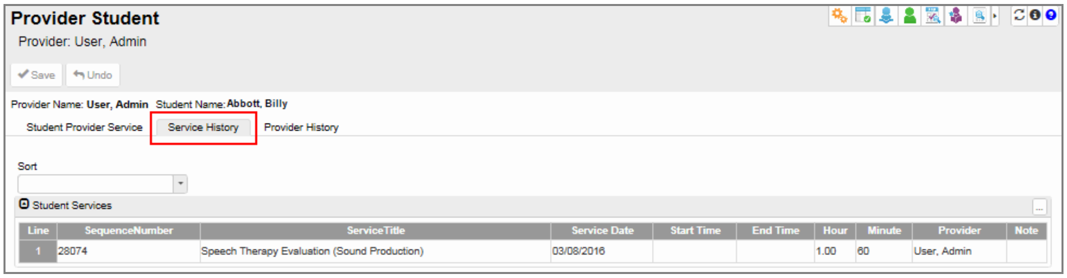
8. Click **Save**. The service displays in the Service or Signed Service section on the Provider Student screen.



Provider Student Screen, Student Provider Service Tab

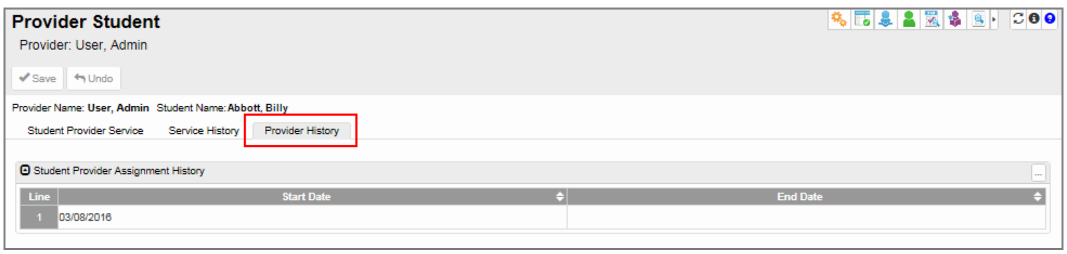
Service and Provider History

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



Provider Student Screen, Service History Tab

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



Provider Student Screen, Provider History Tab

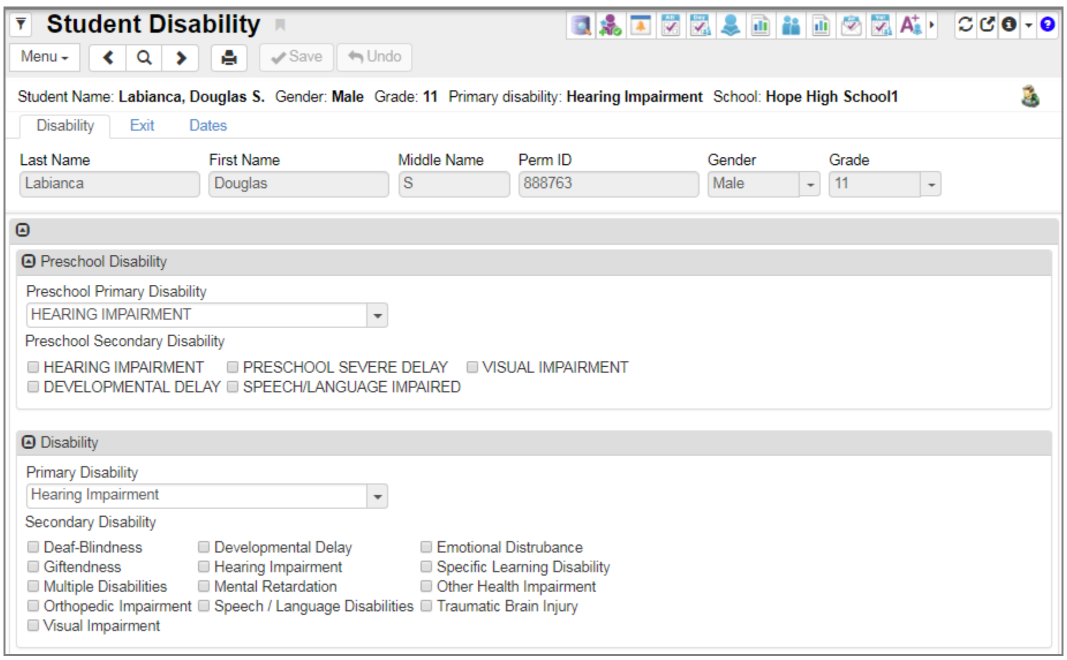
Modifying Student Disability and Special Education Dates

The Student Disability screen:

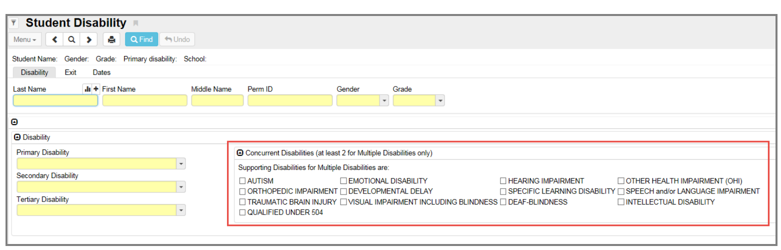
- Displays the student's disability, exit information, and important dates.
- Allows administrators to override the special education settings for a student.

> This screen does not update or create necessary special education documentation to support the settings.

1. Navigate to **Synergy SE > NTL > Student Disability**.
    a. Locate a student.
    b. Modify the student's disabilities if needed.

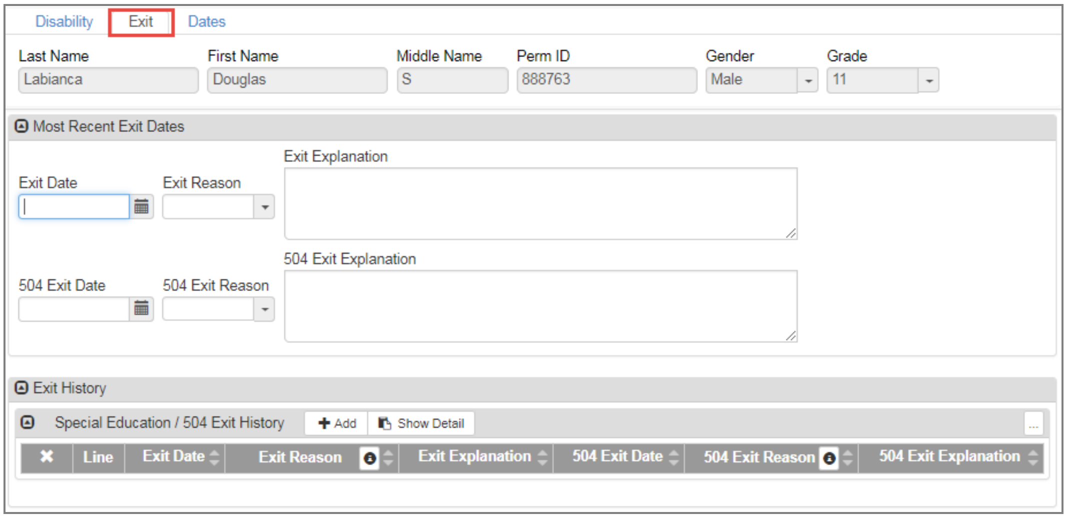


Student Disability Screen

> Some districts display Concurrent Disabilities on this screen.
>
> 
>
>
> *Student Disability Screen*

    c. Click **Save**.

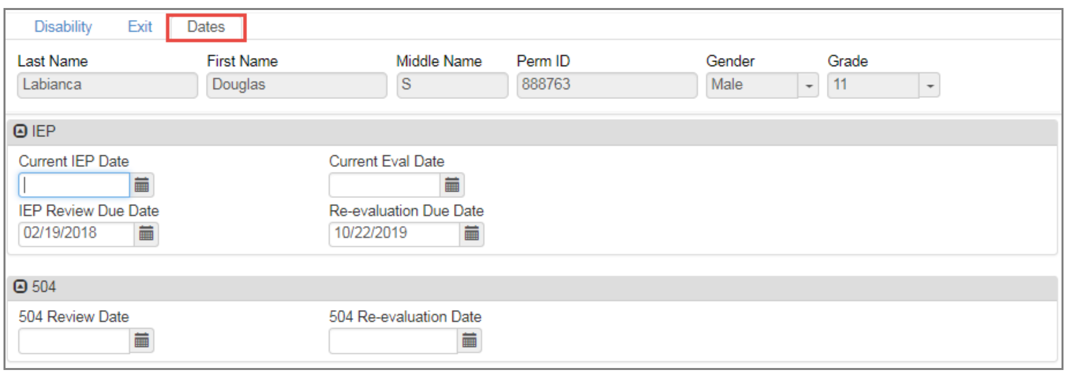
2. Select the **Exit** tab.
    a. Modify the dates or explanations if needed.



Student Disability Screen, Exit Tab

    b. Click **Save**.

3. Select the **Dates** tab.
    a. Modify the dates if needed.



Student Disability Screen, Dates Tab

    b. Click **Save**.

Chapter 4: Synergy SE Processes

Process Overview

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

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

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

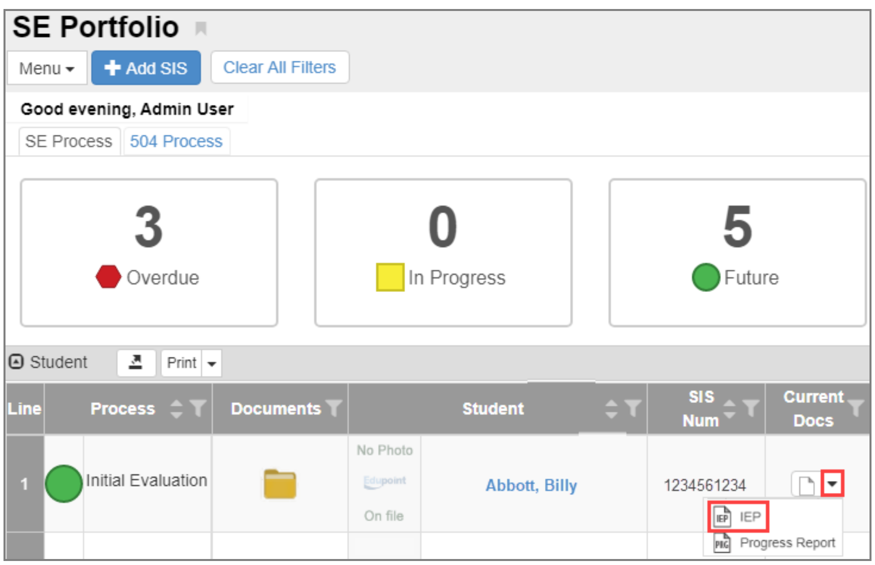
The following scenarios are available within Synergy SE:

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

Initial Process

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

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



SE Portfolio Screen

All documents that were created and finalized in the initial process are listed in **Historical Documents** tab. See the *Oregon Special Education Document Guide* for more information on historical documents.

Annual Review Process

Annual Review students remain in the Annual Review process until the time specified by the district. For example, six months prior to their reevaluation date. When the time interval is reached, they automatically move to the Reevaluation process to prepare for their triennial evaluation.

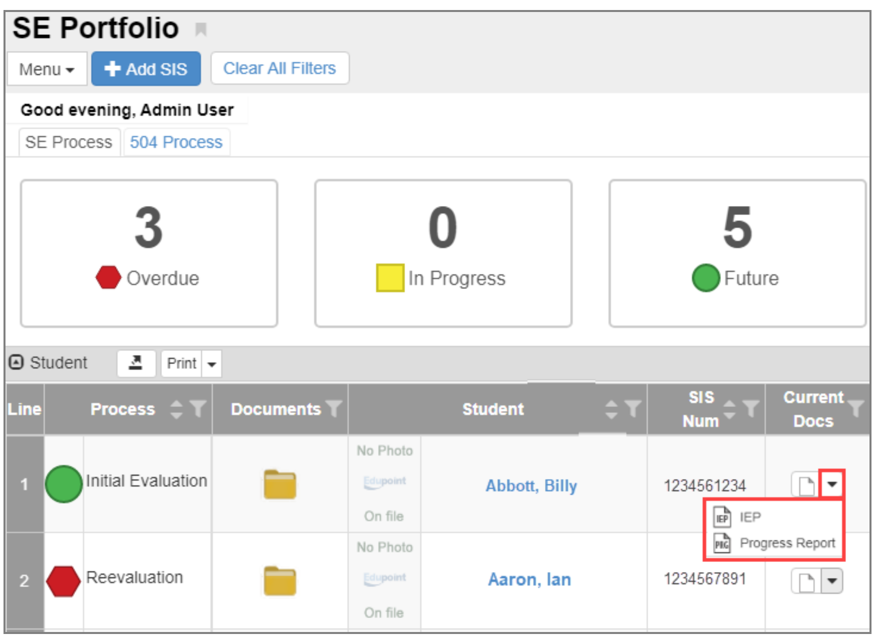
Students may also be moved manually to another process.

Reevaluation Process

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

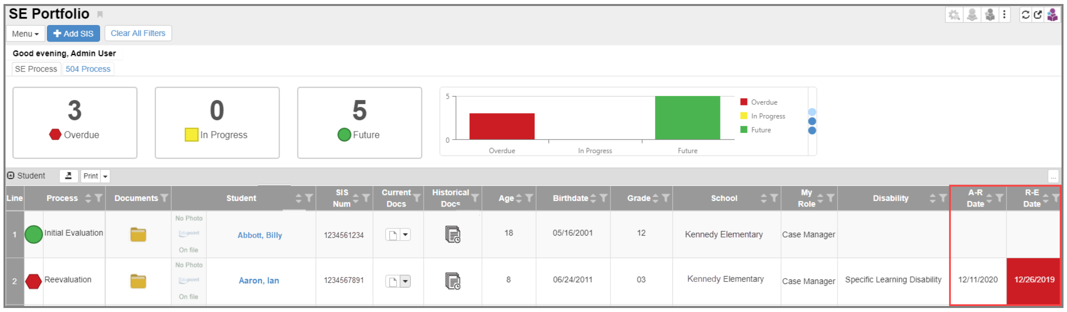
All documents that were created and finalized in the reevaluation process are listed in **Historical Documents** tab. See the *Oregon Special Education Document Guide* for more information on historical documents.

- Access the current Individualized Education Program (IEP) by clicking *IEP*. The date in the current IEP is the trigger document for this process. When it is Validated/Finalized, the student moves to the Annual Review process.
- The quarterly Progress Reports are available by clicking *Progress Report* and includes the goals that were added to the initial IEP.



SE Portfolio Screen

- The Annual Review Date is indicated by A-R Date.
- The Reevaluation Date is indicated by R-E Date.



SE Portfolio Screen

Transfer Process

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

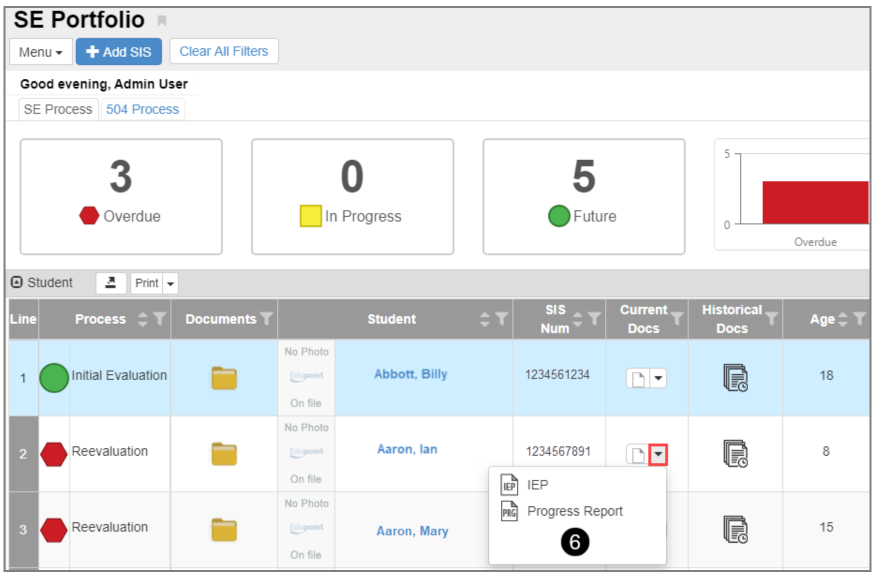
- Finalize the Transfer Meeting Request and Notice of Transfer documents.
- The Transfer IEP is the trigger that moves the student to the appropriate process.

> All documents that were created and finalized in the transfer process are listed in the **Historical Documents** tab. See the *Oregon Special Education Document Guide* for more information on historical documents.

Preschool Process

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

- The IEP is the trigger document for this process. The student moves to the Annual Review process when it is Validated/Finalized.
- The quarterly Progress Reports are available by clicking *Progress Report* and includes the goals that were added to the initial IEP.



SE Portfolio Screen

All documents that were created and finalized in the preschool process are listed in the **Historical Documents** tab. See the *Oregon Special Education Document Guide* for more information on historical documents.

Chapter 5: Synergy SE Reports

Admin Progress Report

Use to batch print progress reports.

1. Set the focus to a school.
2. Navigate to **Synergy SE > NTL > Admin Progress Report**.
3. **Sort** the data by selecting *Name*, *Grade: Ascending*, *Grade: Descending*, *Case Manager: Ascending*, or *Case Manager: Descending* if needed.
4. Click **Refresh Data** to update the Students section. **Data last refreshed on** displays the date and time the last time the data was read.

   > Click **Refresh Data** for the latest progress period to display in the section if progress periods were added to a student's Progress Report.

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

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

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

     > The Students section displays the latest date of the progress period and the Completed status of that period when **Filter by Date** is blank.

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

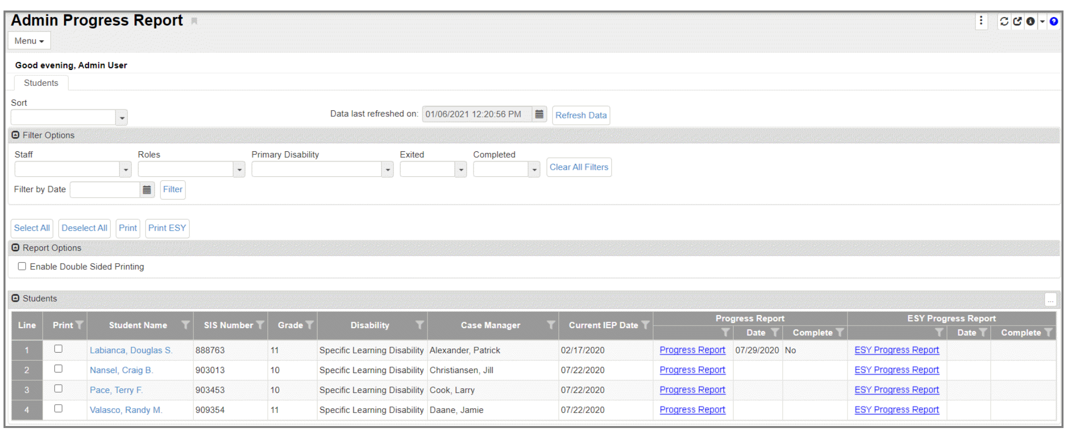
   > Click **Clear Filters** to remove all filters and the clear the **Sort** option.

6. Select **Enable Double Sided Printing** to print an extra page at the end of odd numbered progress reports so the last page from one student does not print on the same sheet of paper as the next student.

7. Select the students that you want to print a progress report for.
    - Select **Print** for individual students.
    - Click **Select All** to print all of the reports.
    - Click **Deselect All** to clear the options.
8. Print the reports
    - Click **Print** to print all progress reports for students with **Print** selected.
    - Click **Print ESY** to print all ESY progress reports for students with **Print** selected.

    The job queue prints the progress reports or ESY progress reports and also creates a log with one line for each student selected. The log indicates if the progress report or ESY progress report printed for a student or not.
9. The following information displays in the Students section.
    - **Student Name** – Click the student link to open the (SE) Student screen.
    - **Case Manager** – Displays the Case Manager
    - **Progress Report** – Click the link to display the student's progress report.
    - **ESY Progress Report** – Click the link to display the student's ESY progress report if used by the district.
    - **Date** – Displays the latest progress period or ESY progress period date

        This field shows the **Filter by Date** if entered and the student has a progress period with that date. Otherwise, it displays blank.
    - **Complete** – Displays *Yes* if the goals for the progress period were completed



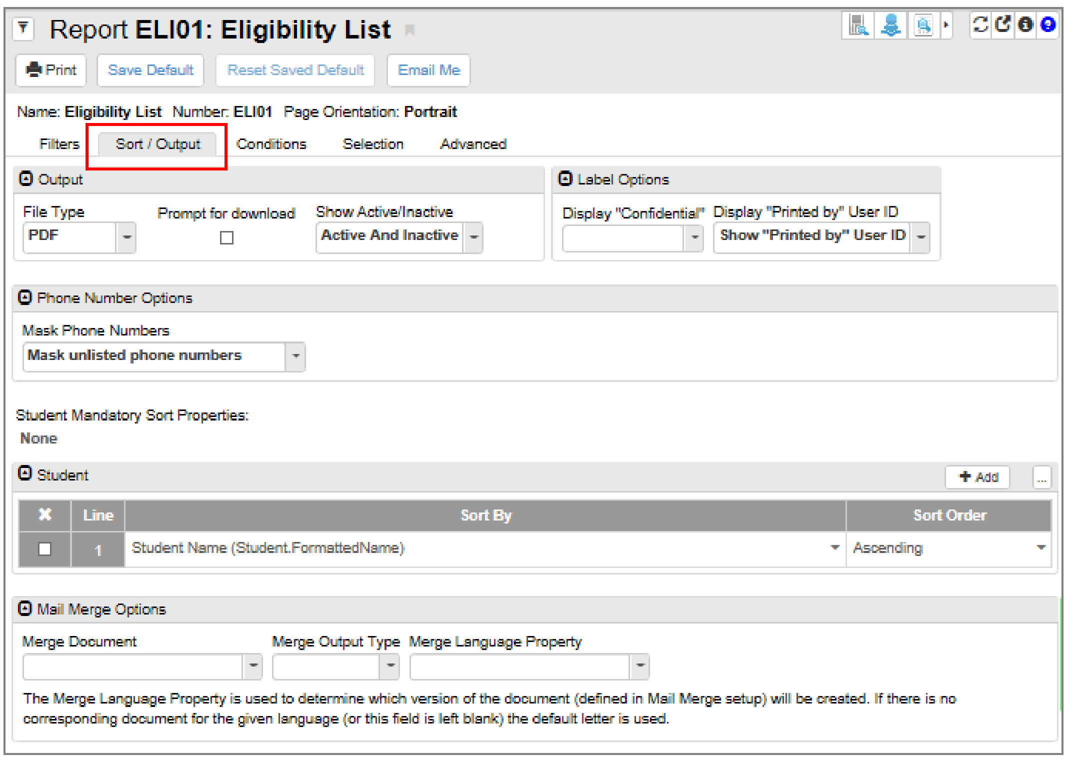
Admin Progress Report Screen

Synergy SE Reports

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

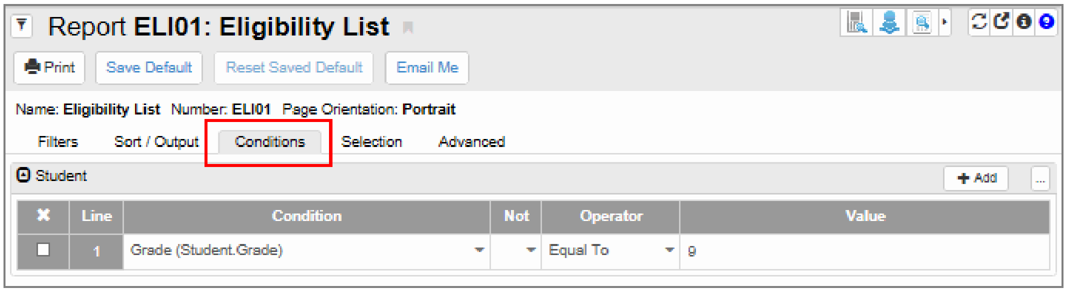
- **Options** – Identifies criteria specific to the report, including dates, codes, and descriptions, which the user may select to filter the results of the report.
- **Sort/Output** – Allows for sorting the report results and providing options for the file output type.
  - **Prompt for download** –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

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



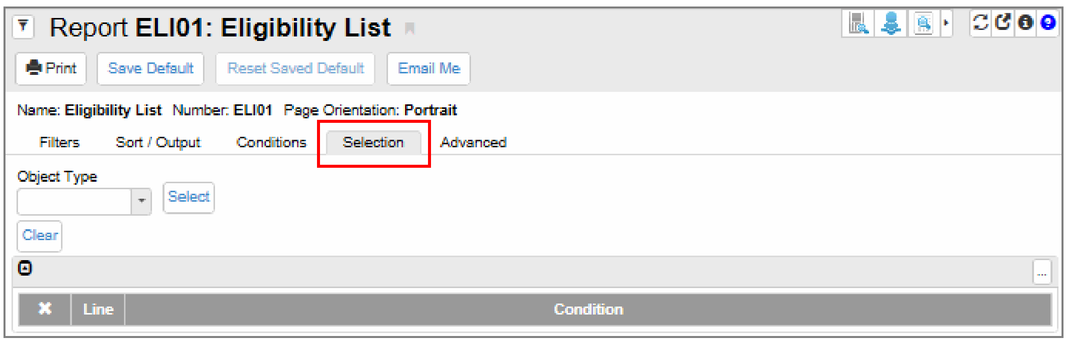
Reports Screen, Sort/Output Tab

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



Reports Screen, Conditions Tab

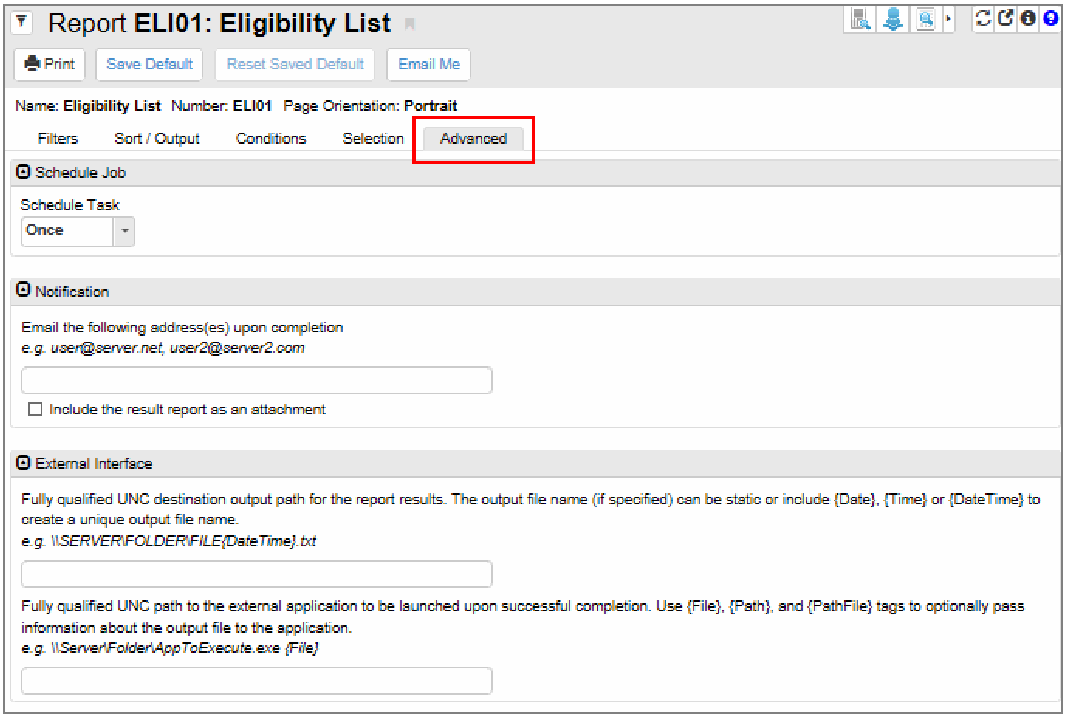
- **Selection** – Provides the ability to filter the report to include a given ad-hoc set of students, courses, sections, staff, and to be filtered by student group



Reports Screen, Selection Tab

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

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



Reports Screen, Advanced Tab

Available Reports

The available Staff reports are:

- CAS01: Case Load
- CLS-LST-01: Class List
- TCH401: Staff Directory

The available Student reports are:

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

Running Reports

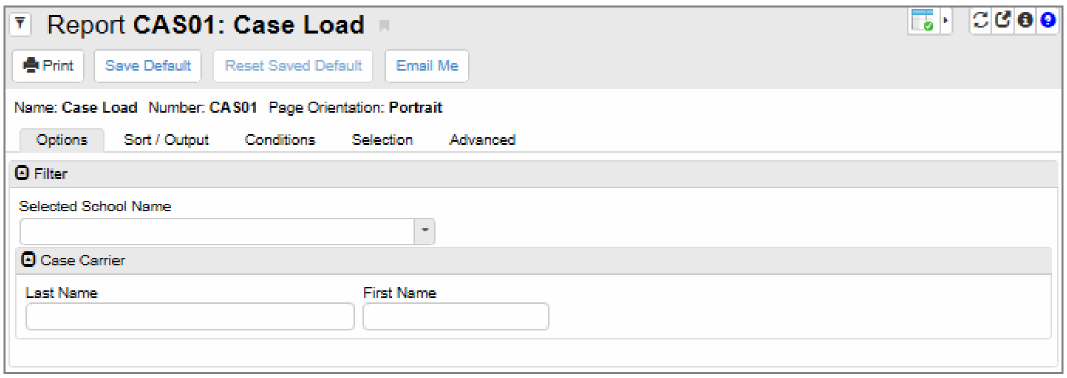
1. Navigate to **Synergy SE > Staff > Reports**.
2. Select the report.
3. Select the **Options**, **Sort/Output**, **Conditions**, **Selection**, and **Advanced** options for the report.
4. Click **Print**.

Staff Reports

CAS01: Case Load

Synergy SE > Staff > Reports

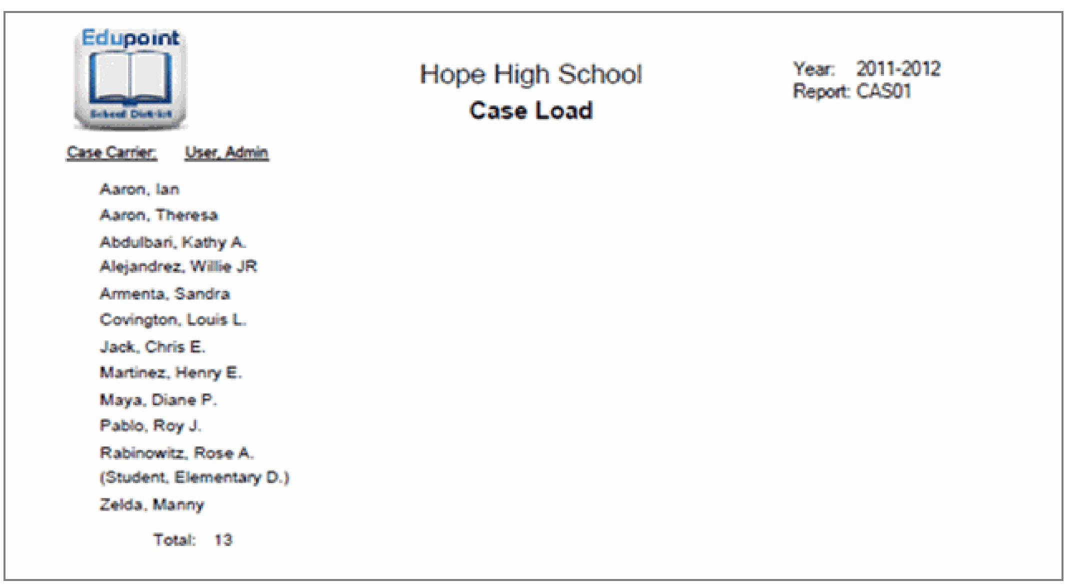
The Case Load report prints the case load for each case manager at the selected school. The report includes the list of students for whom the user is listed as case manager or case carrier on the student's team list.



CAS01 – Case Load Report Interface Screen

Report Options:

- **Selected School Name** – Select a school name to include only that school in the report.
- **Case Carrier** – Select the **Last Name** and **First Name** to only include that case manager in the report.

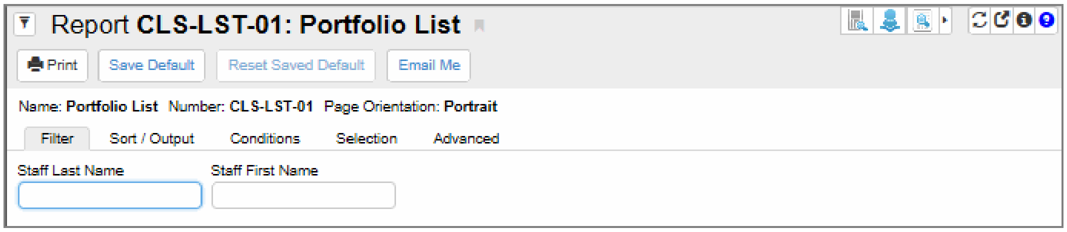


CAS01 – Case Load Report Output

CLS-LST-01 – Portfolio List

Synergy SE > Staff > Reports

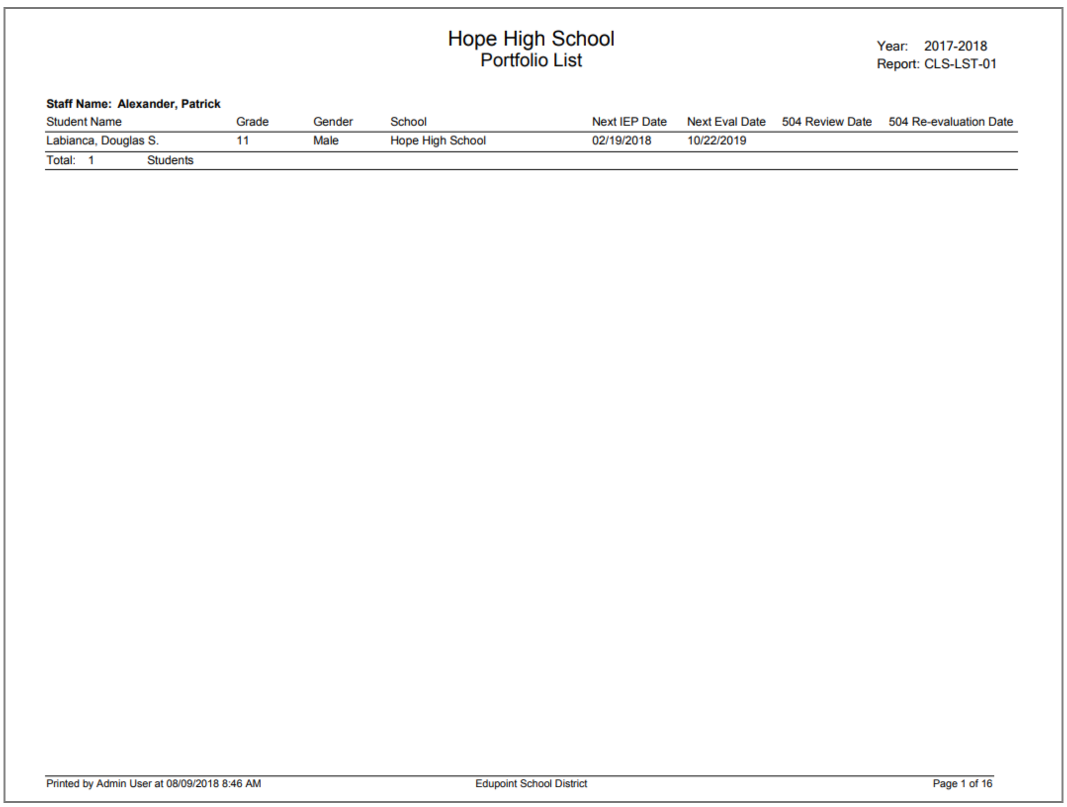
The Portfolio List report prints the class list for the selected staff member. The report includes the list of students for whom the user is listed as a team member. The grade, gender, school, next IEP date, next evaluation date, 504 review date, and 504 reevaluation date is included in the report.



CLS-LST-01 – Portfolio List Report Interface Screen

Report Options:

- **Staff Last Name** and **Staff First Name** – Enter the staff name to filter the results of the report for a specific staff member.


Hope High School
Portfolio List

Year: 2017-2018
Report: CLS-LST-01

Staff Name: Alexander, Patrick

Student Name	Grade	Gender	School	Next IEP Date	Next Eval Date	504 Review Date	504 Re-evaluation Date
Labianca, Douglas S.	11	Male	Hope High School	02/19/2018	10/22/2019		
Total: 1 Students							

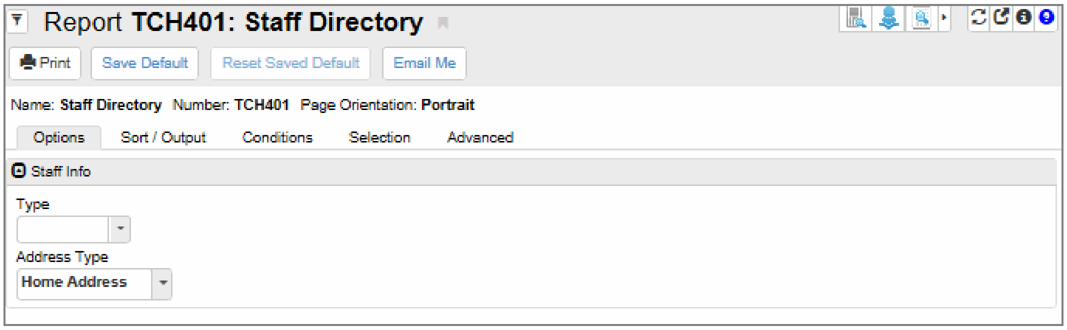
Printed by Admin User at 08/09/2018 8:46 AM   Edupoint School District   Page 1 of 16

CLS-LST-01 – Portfolio List Report Output

TCH401 – Staff Directory

Synergy SE > Staff > Reports

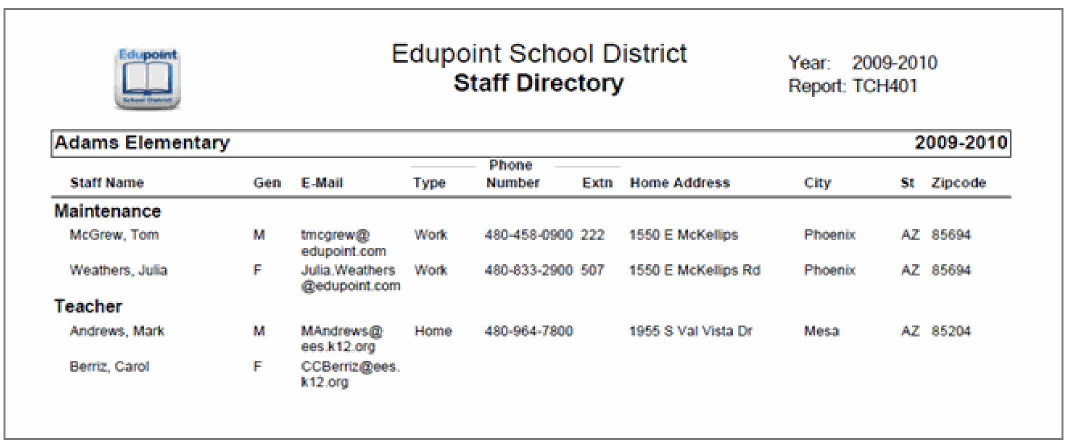
The Staff Directory report lists all staff including their email, primary phone number, and address. The list is sorted by staff type.



TCH401 – Staff Directory Report Interface Screen

Report Options:

- **Type** – Select to filter by staff type
- **Address Type** – Select to sort by home or mailing address



Edupoint School District
Staff Directory

Year: 2009-2010
Report: TCH401

Adams Elementary **2009-2010**

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

TCH401 – Staff Directory Report Output

Student Reports

APM01 – Automatic Process Movement

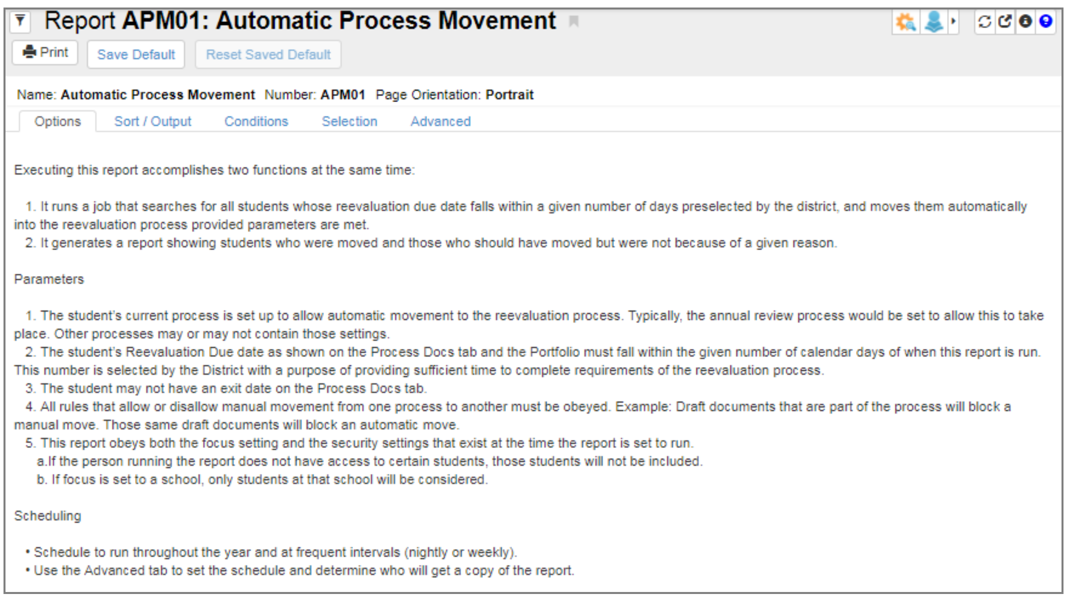
Synergy SE > Student > Reports

The Automatic Process Movement report:

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

  Example messages for student's who did not move:

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



APM01 – Automatic Process Movement Report Interface Screen

Parameters

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

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

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

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

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

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

Rules

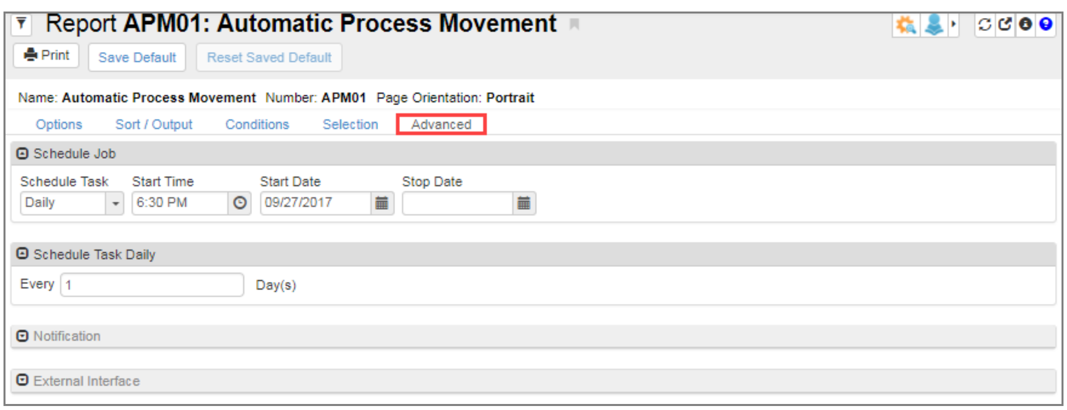
The report follows the following rules:

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

Scheduling

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

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



APM01 – Automatic Process Movement Report Interface Screen, Advanced Tab

Edupoint School District
Automatic Process Moves

Year: 2016-2017
Report: APM01

School: Hope High School

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

School: Jefferson Elementary

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

School: King High School

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

School: Lincoln Elementary

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

School: Adams Elementary

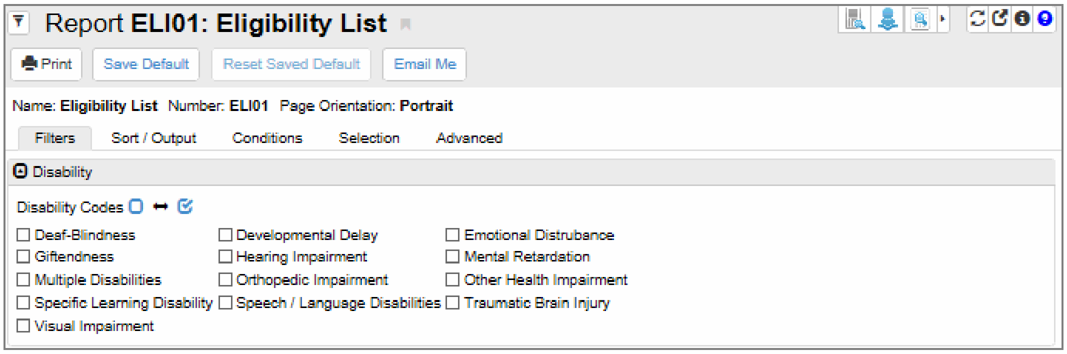
Student Name	SIS Number	Grade	Student Moved	Message
Aaron, Ian	132123	1	Yes	

APM01 – Automatic Process Movement Report Output

ELI01 – Eligibility List

Synergy SE > Student > Reports

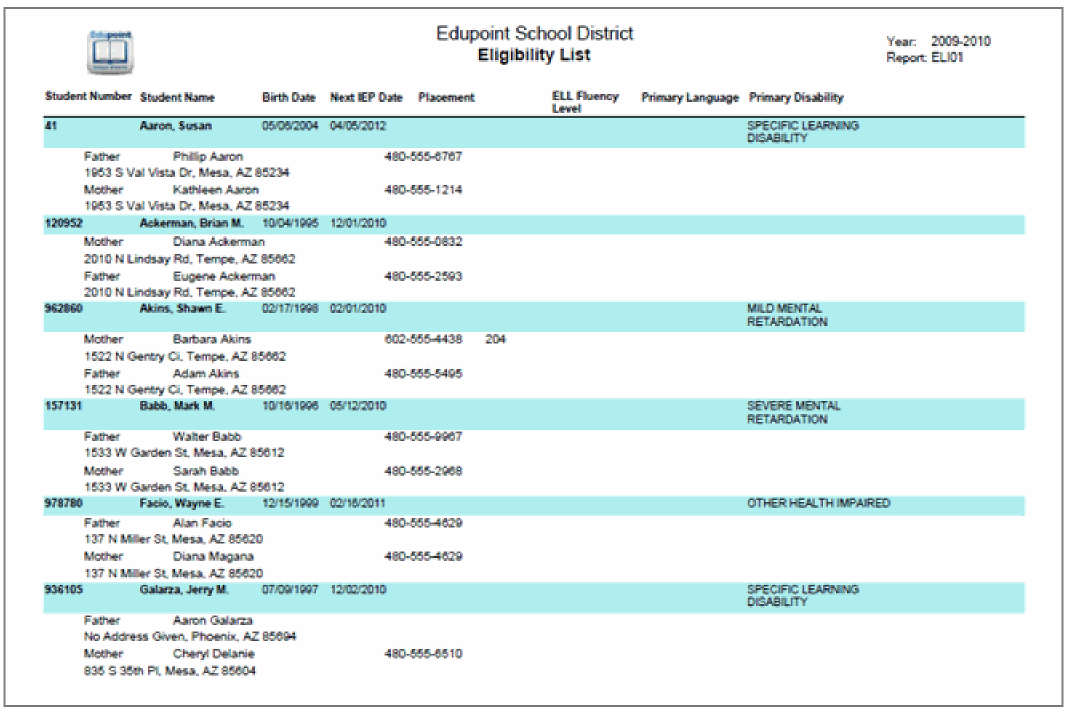
The Eligibility List report provides a list of students based on primary disability options selected. The report includes student name, ID and address, parent information, primary language, and disability.



ELI01 – Eligibility List Report Interface Screen

Report Options:

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



Edupoint School District
Eligibility List

Year: 2009-2010
Report: ELI01

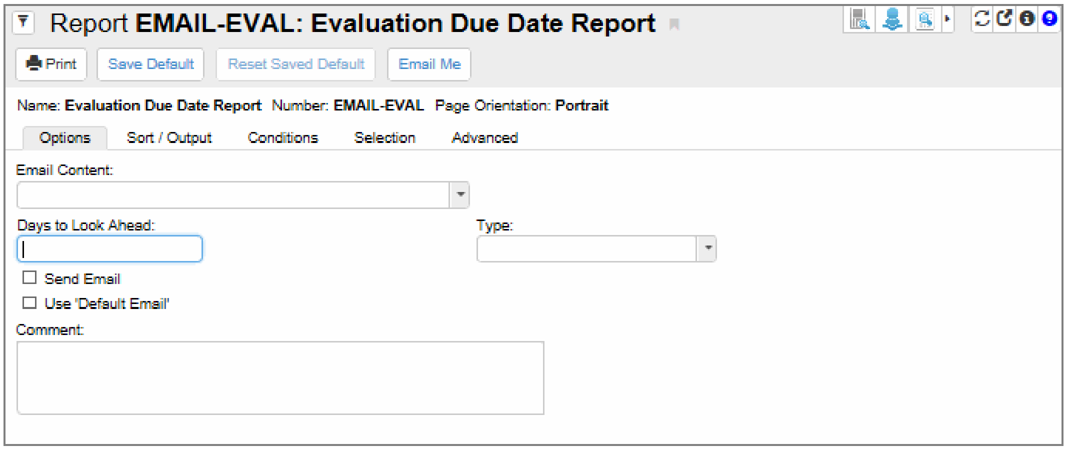
Student Number	Student Name	Birth Date	Next IEP Date	Placement	ELL Fluency Level	Primary Language	Primary Disability
41	**Aaron, Susan**	05/06/2004	04/05/2012				SPECIFIC LEARNING DISABILITY
	Father Phillip Aaron			480-555-6767			
	1953 S Val Vista Dr, Mesa, AZ 85234						
	Mother Kathleen Aaron			480-555-1214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

ELI01 – Eligibility List Report Output

EMAIL-EVAL– Evaluation Due Date Report

Synergy SE > Student > Reports

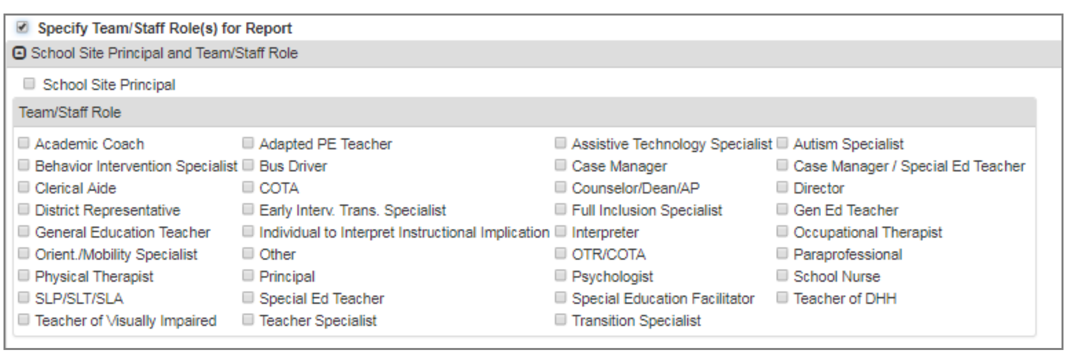
The Evaluation Due Date Report lists all case managers with a student that has an evaluation due for the period selected. It can create a report and/or send emails to the individual case managers.



EMAIL-EVAL – Evaluation Due Date Report Interface Screen

Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having students with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – Enter a comment to be printed at the top of the report and in the body of the email if needed.
- **Specify Team/Staff Role(s) for Report** – Select the **School Site Principal** and/or other Team/Staff Roles to list in the report in addition to the Case Manager.



EMAIL-EVAL – Evaluation Due Date Report Interface Screen

Edupoint

Hope High School
Evaluation Due Date Report

Year: 2011-2012
Report: EMAIL-EVAL

Days to Look Ahead: 180 **Type:** Business Calendar Days
From Email Address: **Send Email** ☐
Comment:

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

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

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

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

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

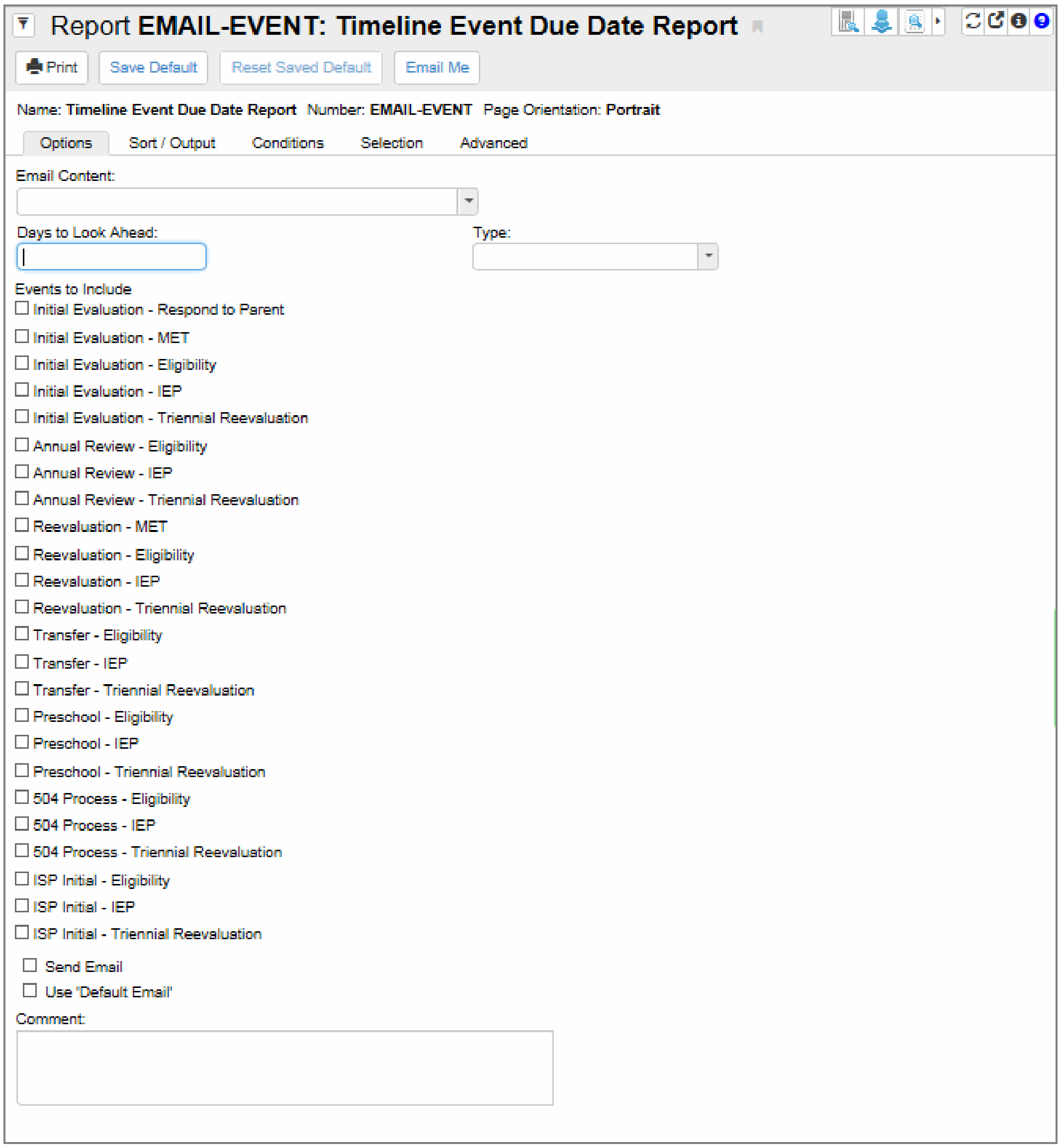
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	10/09/2012	48	Hope High School

EMAIL-EVAL – Evaluation Due Date Report Output

EMAIL-EVENT – Timeline Event Due Date Report

Synergy SE > Student > Reports

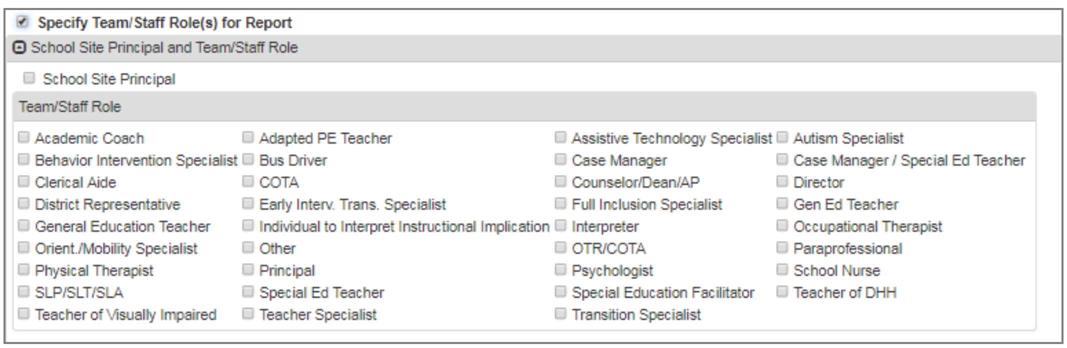
The Timeline Event Due Date Report lists all case managers and selected team and staff roles for a student that has a timeline event for the period selected. It can create a report and/or send emails to the individual case managers.



EMAIL-EVENT – Timeline Event Due Date Report Interface Screen

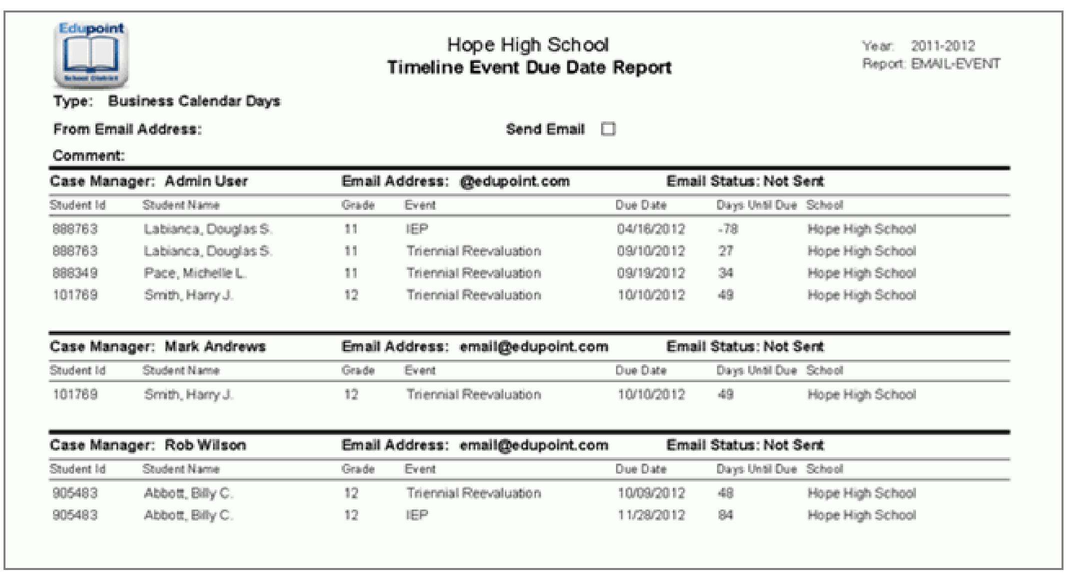
Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having students with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – Enter a comment to be printed at the top of the report and in the body of the email if needed.
- **Events to Include** – Select a least one event from the options.
- **Specify Team/Staff Role(s) for Report** – Select the **School Site Principal** and/or other Team/Staff Roles to list in the report in addition to the Case Manager.


Specify Team/Staff Role(s) for Report
School Site Principal and Team/Staff Role
School Site Principal
Team/Staff Role

Academic Coach	Adapted PE Teacher	Assistive Technology Specialist	Autism Specialist
Behavior Intervention Specialist	Bus Driver	Case Manager	Case Manager / Special Ed Teacher
Clerical Aide	COTA	Counselor/Dean/AP	Director
District Representative	Early Interv. Trans. Specialist	Full Inclusion Specialist	Gen Ed Teacher
General Education Teacher	Individual to Interpret Instructional Implication	Interpreter	Occupational Therapist
Orient./Mobility Specialist	Other	OTR/COTA	Paraprofessional
Physical Therapist	Principal	Psychologist	School Nurse
SLP/SLT/SLA	Special Ed Teacher	Special Education Facilitator	Teacher of DHH
Teacher of Visually Impaired	Teacher Specialist	Transition Specialist	

EMAIL-EVENT – Timeline Event Due Date Report Interface Screen


Hope High School
Timeline Event Due Date Report
Year: 2011-2012
Report: EMAIL-EVENT
Type: Business Calendar Days
From Email Address:
Send Email
Comment:

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

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

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

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

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

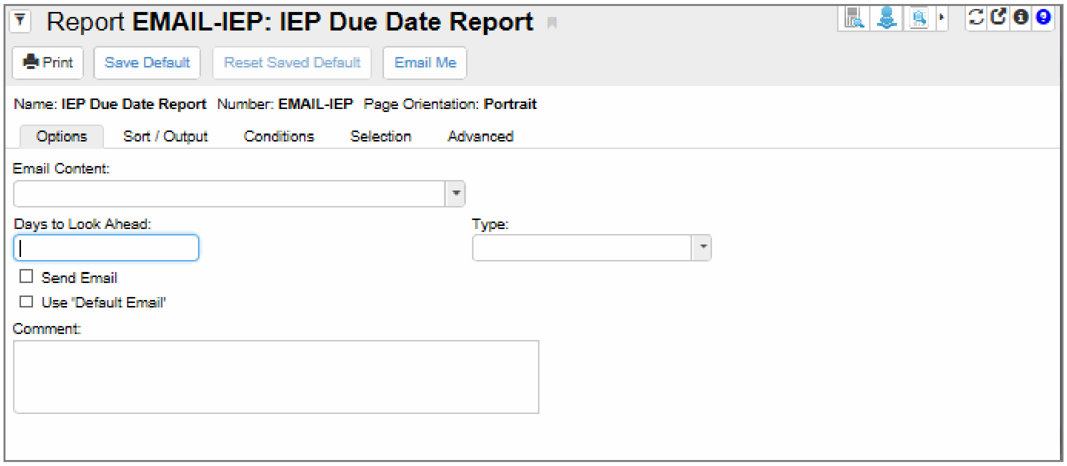
Student Id	Student Name	Grade	Event	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	Triennial Reevaluation	10/09/2012	48	Hope High School
905483	Abbott, Billy C.	12	IEP	11/28/2012	84	Hope High School

EMAIL-EVENT – Timeline Event Due Date Report Output

EMAIL-IEP – IEP Due Date Report

Synergy SE > Student > Reports

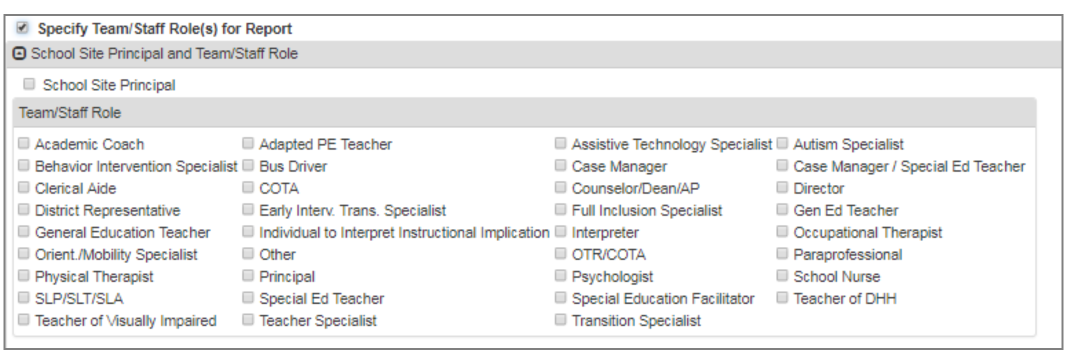
The IEP Due Date Report lists all case managers with a student that has an IEP due for the period selected. It can create a report and/or send emails to the individual case managers.



EMAIL-IEP – IEP Due Date Report Interface Screen

Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having students with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – Enter a comment to be printed at the top of the report and in the body of the email if needed.
- **Specify Team/Staff Role(s) for Report** – Select the **School Site Principal** and/or other Team/Staff Roles to list in the report in addition to the Case Manager.



EMAIL-IEP – IEP Due Date Report Interface Screen

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

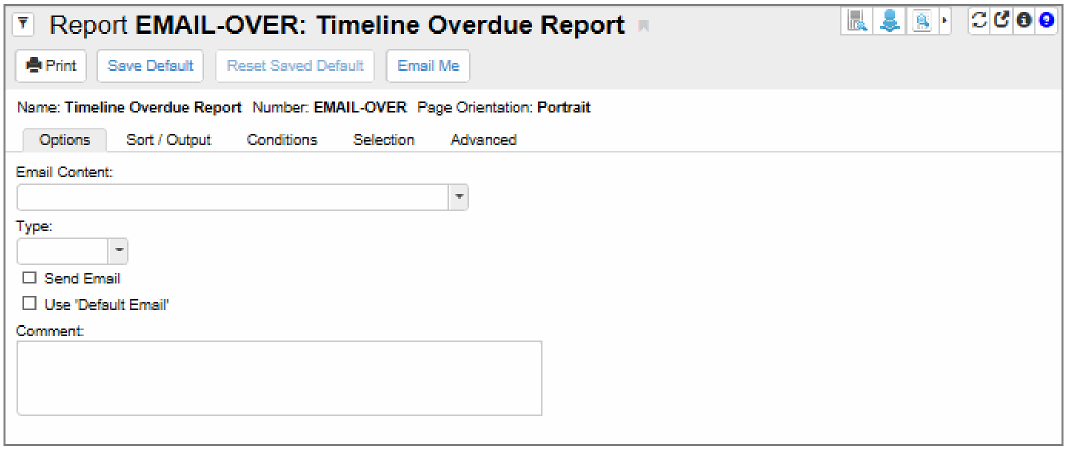
Student Id	Student Name	Grade	Due Date	Days Until Due	School
905483	Abbott, Billy C.	12	11/28/2012	84	Hope High School

EMAIL-IEP – IEP Due Date Report Output

EMAIL-OVER – Timeline Overdue Report

Synergy SE > Student > Reports

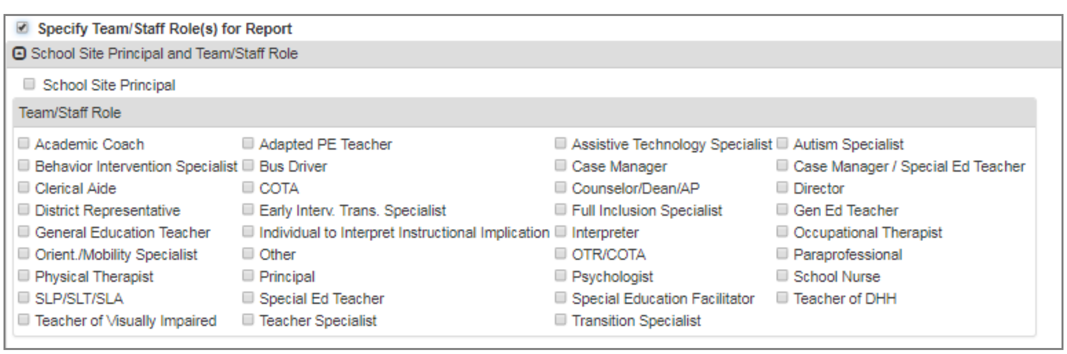
The Timeline Overdue Report lists all case managers with a student that has an overdue timeline event, including eligibility, IEP, or triennial reevaluation, for the period selected. It can create a report and/or send emails to the individual case managers.



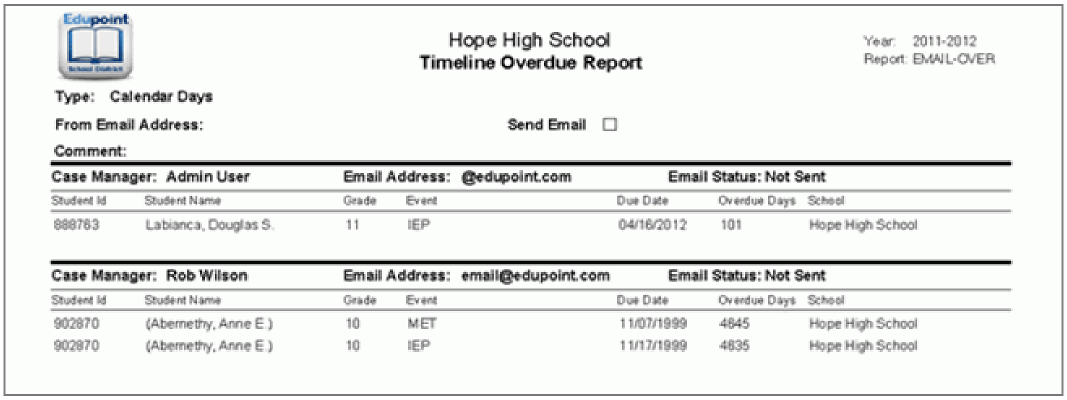
EMAIL-OVER – Timeline Overdue Report Interface Screen

Report Options:

- **Email Content** – Select the content to include in the email from the drop-down.
- **Days to Look Ahead** – Enter the number of days to look ahead.
- **Type** – Select the day type from calendar, business or school calendar and business calendar.
- **Send Email** – Select to send an email to each case manager having students with an event in the selected days.
- **Use 'Default Email'** – Select to use the email address for the Organization setup and not the person sending the email.
- **Comment** – Enter a comment to be printed at the top of the report and in the body of the email if needed.
- **Specify Team/Staff Role(s) for Report** – Select the **School Site Principal** and/or other Team/Staff Roles to list in the report in addition to the Case Manager.



EMAIL-OVER – Timeline Overdue Report Interface Screen



Hope High School
Timeline Overdue Report

Year: 2011-2012
Report: EMAIL-OVER

Type: **Calendar Days**

From Email Address: **Send Email** ☐

Comment:

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

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

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

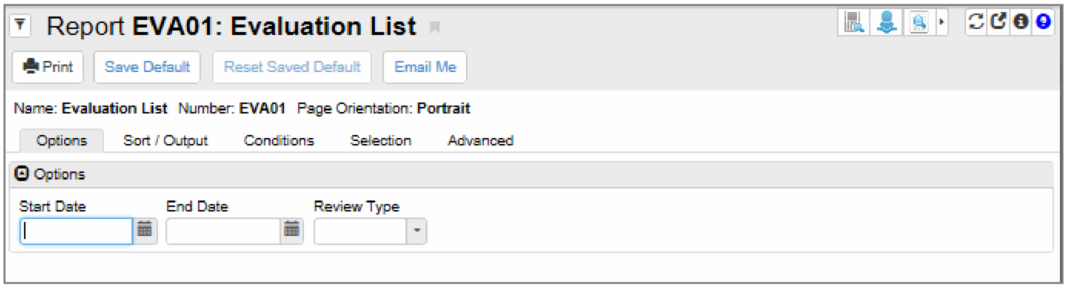
Student Id	Student Name	Grade	Event	Due Date	Overdue Days	School
902870	(Abernethy, Anne E.)	10	MET	11/07/1999	4645	Hope High School
902870	(Abernethy, Anne E.)	10	IEP	11/17/1999	4635	Hope High School

EMAIL-OVER – Timeline Overdue Report Output

EVA01 – Evaluation List

Synergy SE > Student > Reports

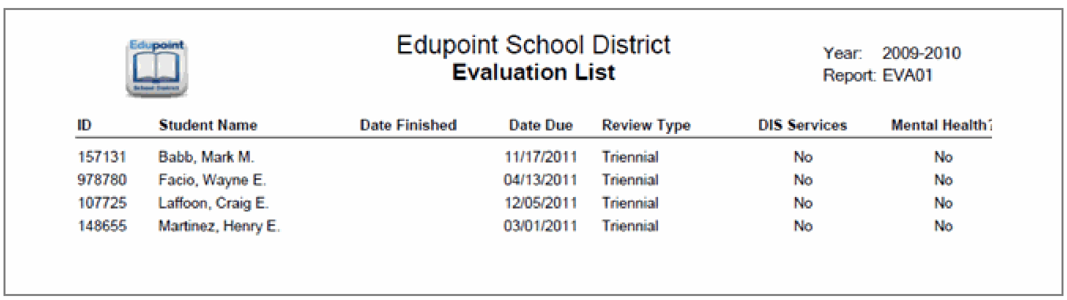
The Evaluation List displays students due for the specified review type within a specified date range.



EVA01 – Evaluation List Report Interface Screen

Report Options:

- **Start Date** – Select the start date to include in the report.
- **End Date** – Select the end date to include in the report.
- **Review Type** – Select the review type to include in the report.



Edupoint School District
Evaluation List

Year: 2009-2010
Report: EVA01

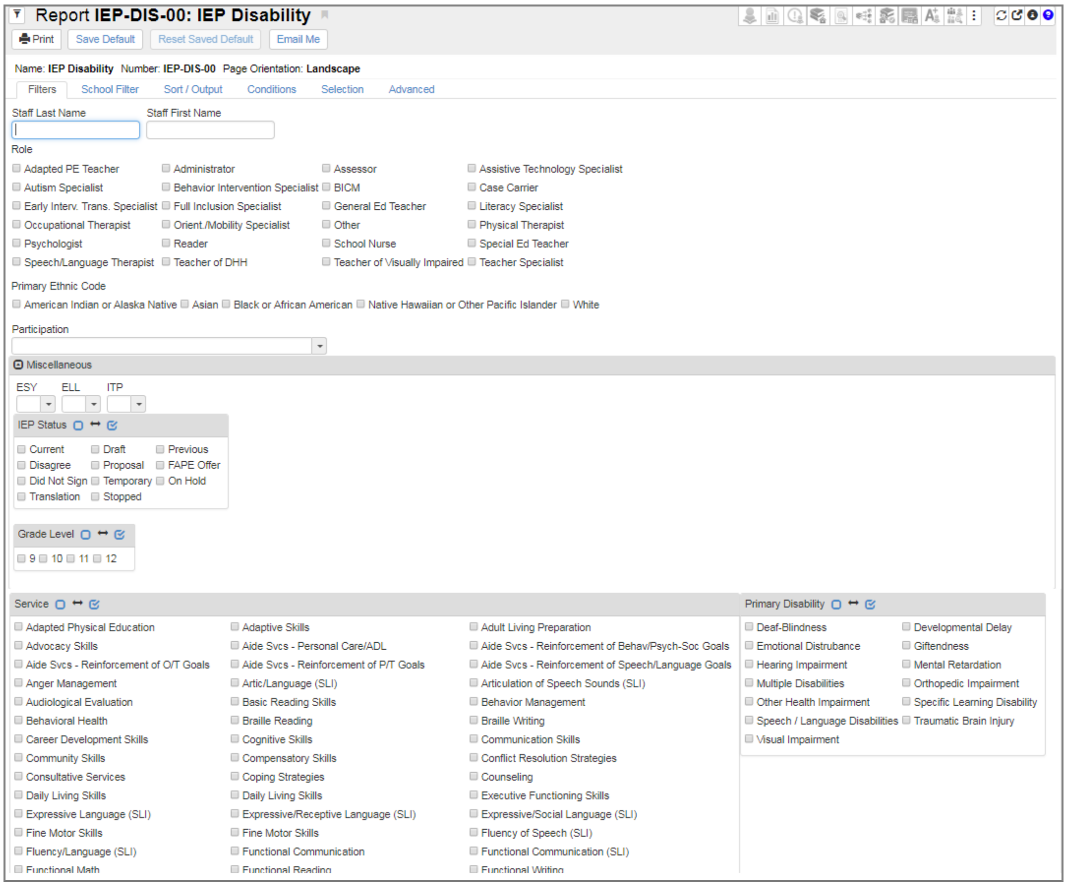
ID	Student Name	Date Finished	Date Due	Review Type	DIS Services	Mental Health
157131	Babb, Mark M.		11/17/2011	Triennial	No	No
978780	Facio, Wayne E.		04/13/2011	Triennial	No	No
107725	Laffoon, Craig E.		12/05/2011	Triennial	No	No
148655	Martinez, Henry E.		03/01/2011	Triennial	No	No

EVA01 – Evaluation List Report Output

IEP-DIS-00 – IEP Disability

Synergy SE > Student > Reports

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



IEP-DIS-00 – IEP Disability Report Interface Screen

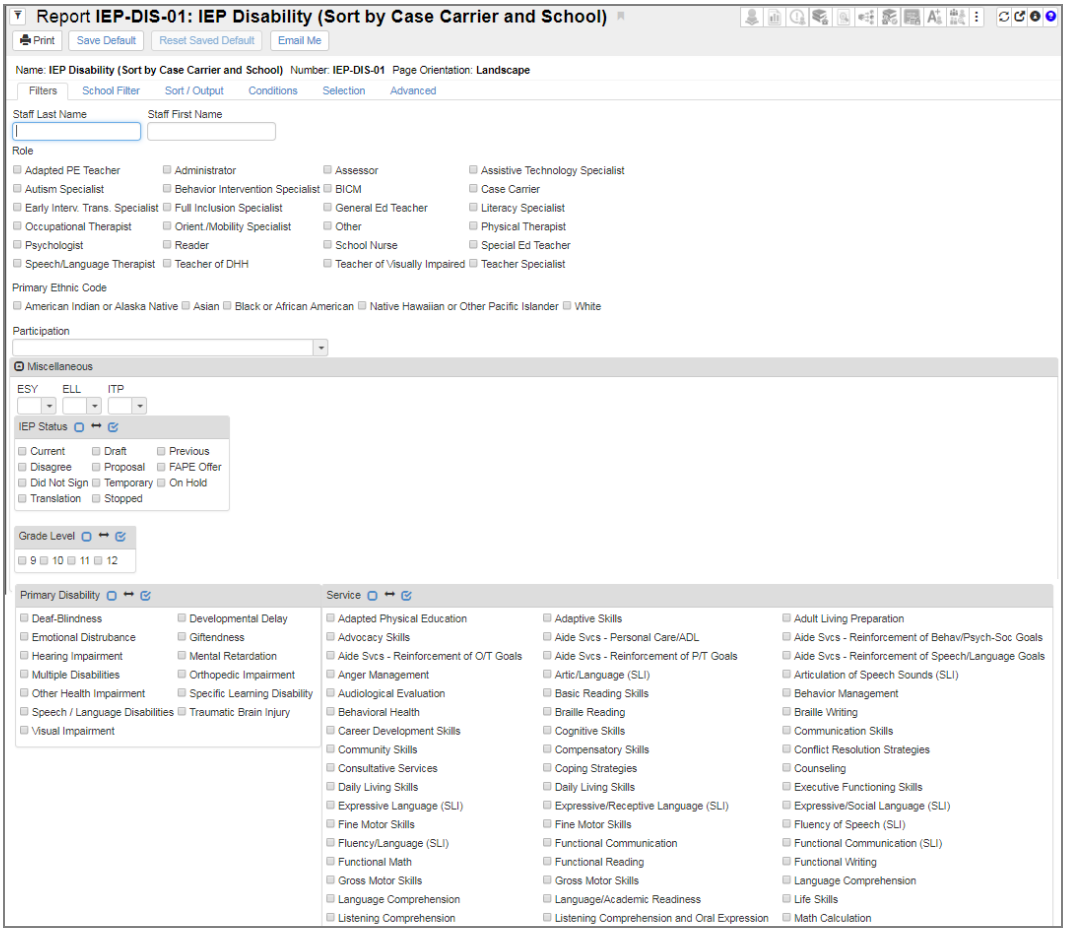
Report Options:

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

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

Synergy SE > Student > Reports

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



IEP-DIS-01 – IEP Disability Report Interface Screen

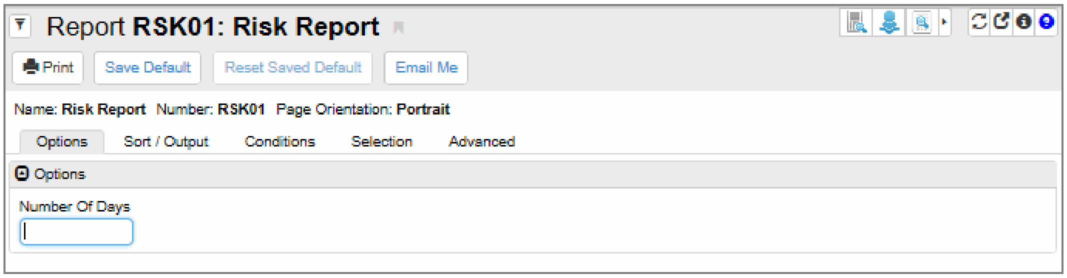
Report Options:

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

RSK01 – Risk Report

Synergy SE > Student > Reports

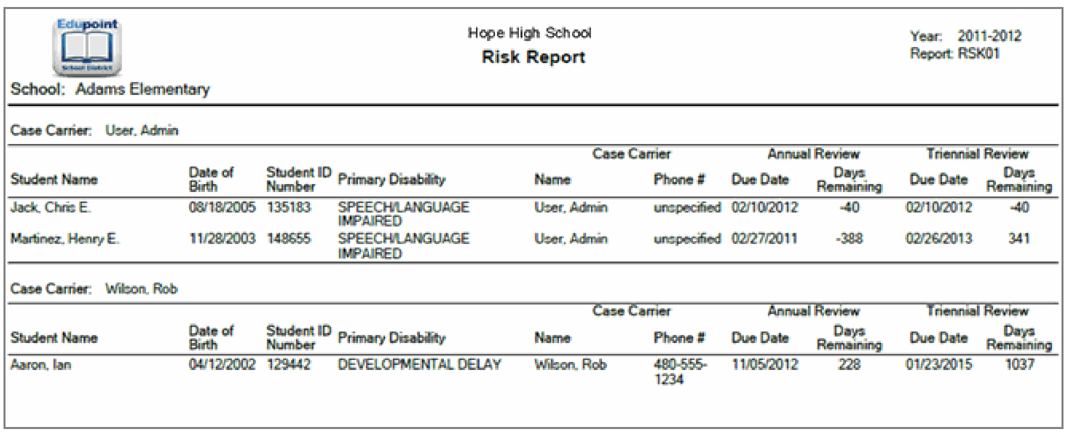
The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by school (new page per location), with case manager name and phone, and due date and days remaining until the event.



RSK01 – Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report
Year: 2011-2012
Report: RSK01

School: Adams Elementary

Case Carrier: User, Admin

				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
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

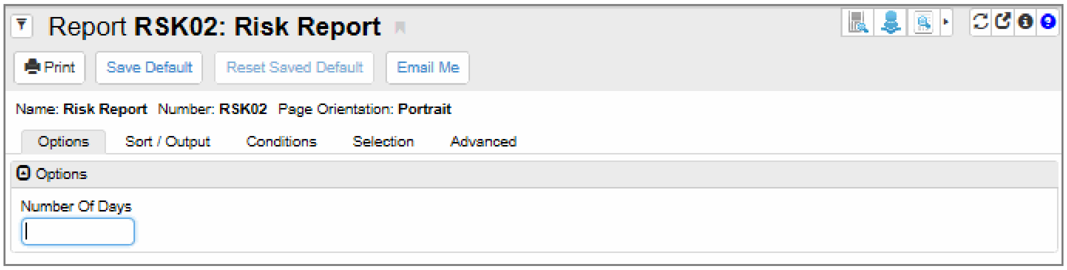
				Case Carrier		Annual Review		Triennial Review	
Student Name	Date of Birth	Student ID Number	Primary Disability	Name	Phone #	Due Date	Days Remaining	Due Date	Days Remaining
Aaron, Ian	04/12/2002	129442	DEVELOPMENTAL DELAY	Wilson, Rob	480-555-1234	11/05/2012	228	01/23/2015	1037

RSK01 – Risk Report Output

RSK02 – Risk Report

Synergy SE > Student > Reports

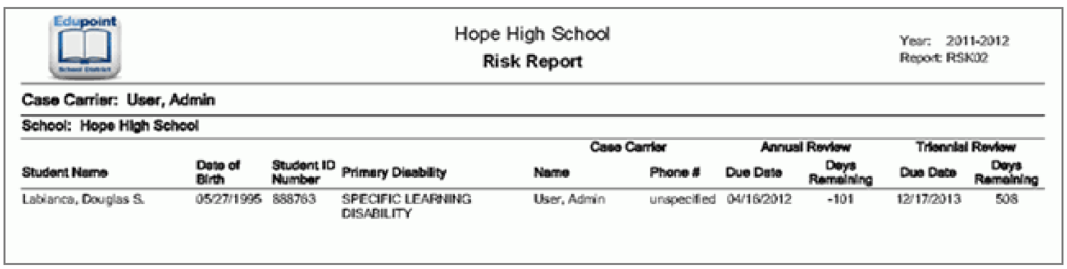
The Risk Report lists all special education students who have an IEP review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK02 – Risk Report Interface Screen

Report Options:

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


Hope High School
Risk Report
Year: 2011-2012
Report: RSK02

Case Carrier: User, Admin

School: Hope High School

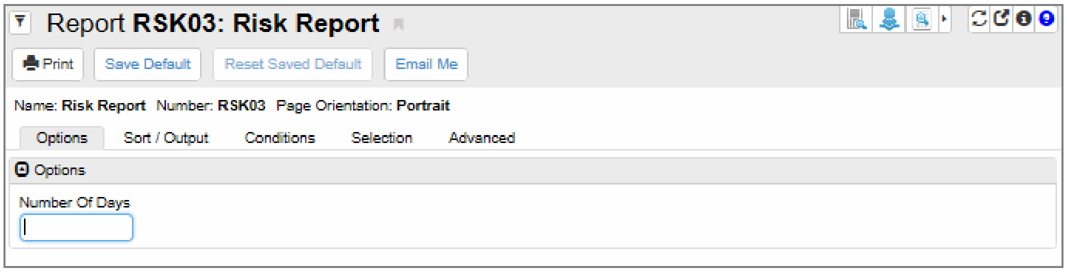
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified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

RSK02 – Risk Report Output

RSK03 – Risk Report

Synergy SE > Student > Reports

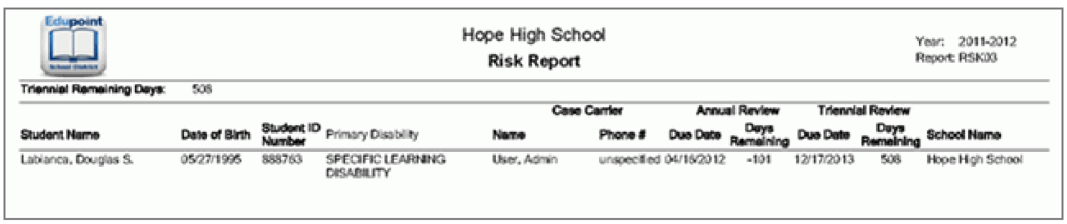
The Risk Report lists all special education students who have a triennial review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK03 – Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK03

Triennial Remaining Days: 508

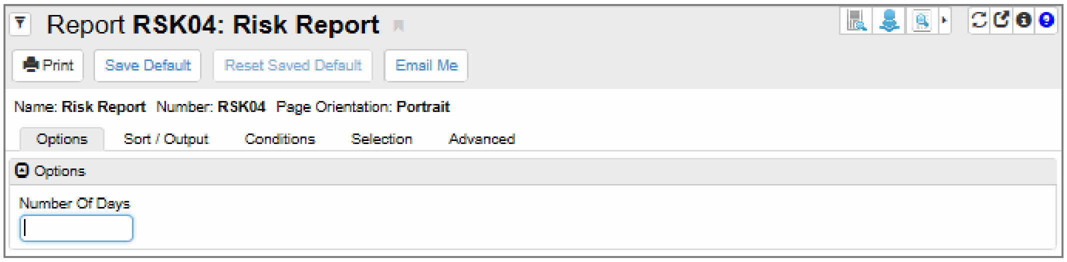
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Case Carrier Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin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

RSK03 – Risk Report Output

RSK04 – Risk Report

Synergy SE > Student > Reports

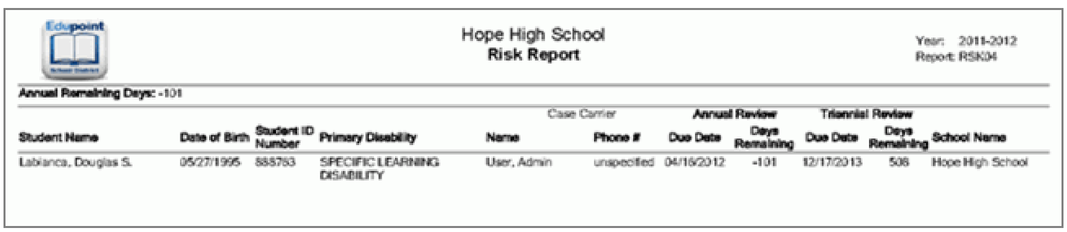
The Risk Report lists all special education students who have an annual review upcoming within the specified number of days, sorted by case manager, with the student name, student ID, student date of birth, case manager name and phone, and due date and days remaining until the event.



RSK04 – Risk Report Interface Screen

Report Options:

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



Hope High School
Risk Report

Year: 2011-2012
Report: RSK04

Annual Remaining Days: -101

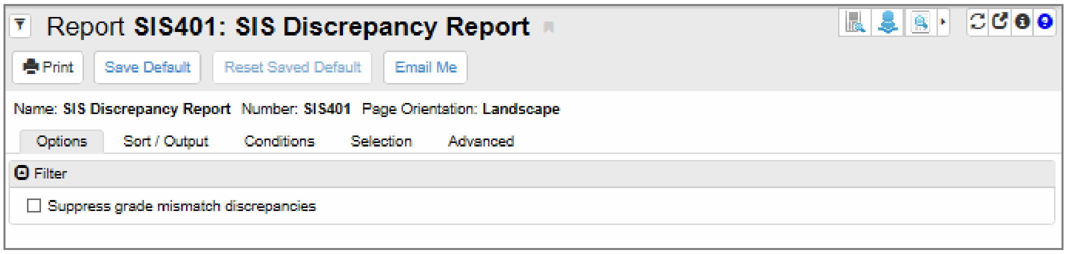
Student Name	Date of Birth	Student ID Number	Primary Disability	Case Carrier Name	Phone #	Annual Review Due Date	Annual Review Days Remaining	Triennial Review Due Date	Triennial Review Days Remaining	School Name
Labianca, Douglas S.	05/27/1995	888763	SPECIFIC LEARNING DISABILITY	User, Admin	unspecified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

RSK04 – Risk Report Output

SIS401 – SIS Discrepancy Report

Synergy SE > Student > Reports

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



SIS401 – SIS Discrepancy Report Interface Screen

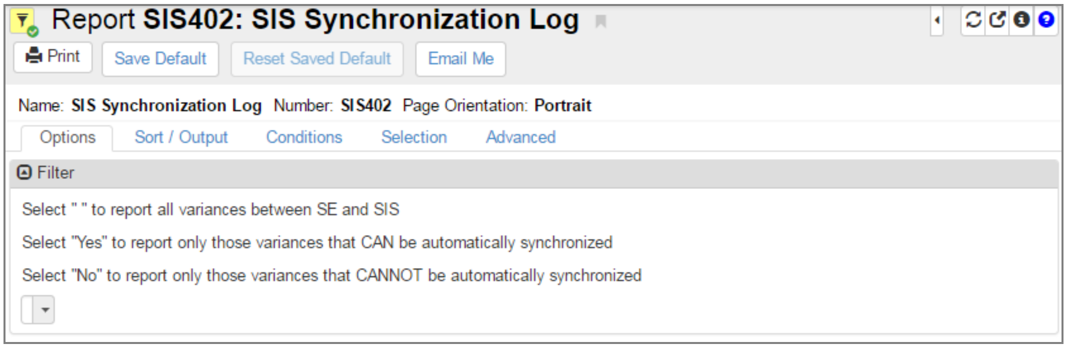
Report Options:

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

SIS402 – SIS Synchronization Log

Synergy SE > Student > Reports

The report lists synchronization events if Synergy SE is used in conjunction with a student information system other than Synergy SIS.



SIS402 – SIS Synchronization Log Report Interface Screen

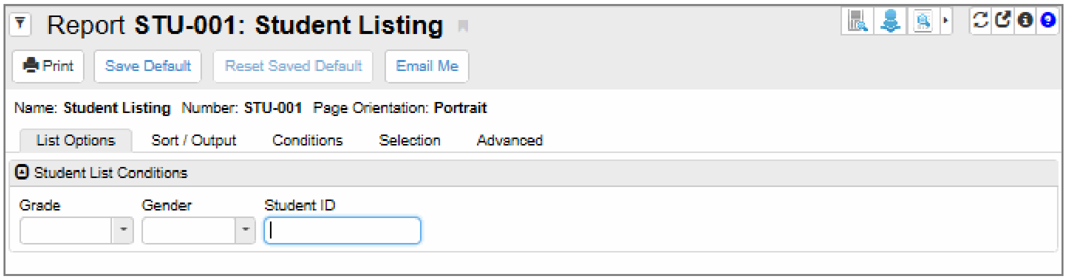
Report Options:

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

STU-001 – Student Listing

Synergy SE > Student > Reports

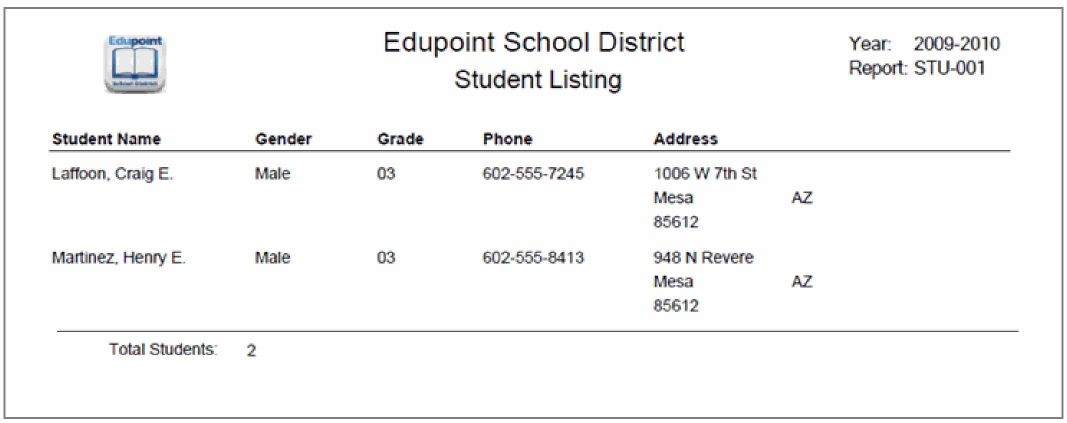
Lists Student Name, Gender, Grade Phone and Address of Students according to the Focus (for example, School or District) according to parameters specified.



STU-001 – Student Listing Report Interface Screen

Report Options:

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



Edupoint School District
Student Listing

Year: 2009-2010
Report: STU-001

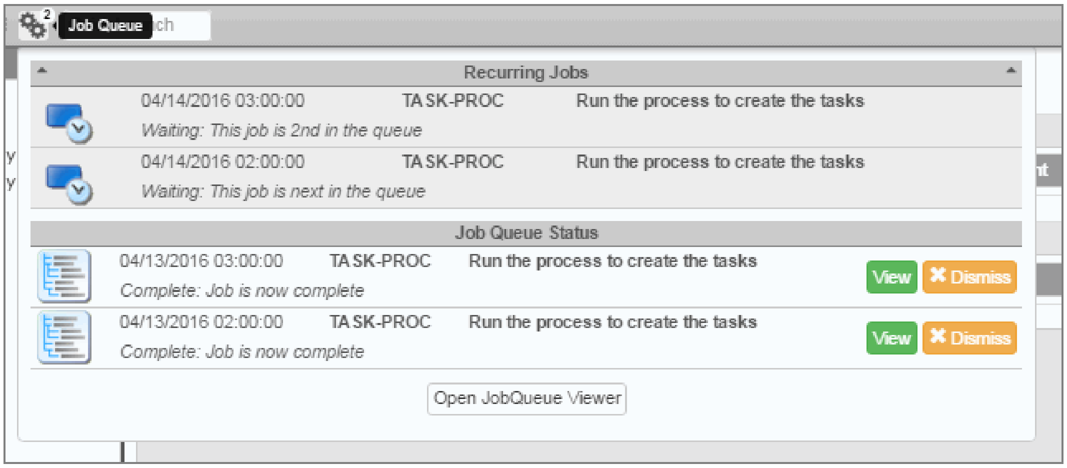
Student Name	Gender	Grade	Phone	Address
Laffoon, Craig E.	Male	03	602-555-7245	1006 W 7th St Mesa AZ 85612
Martinez, Henry E.	Male	03	602-555-8413	948 N Revere Mesa AZ 85612

Total Students: 2

STU-001 – Student Listing Report Output

Job Queue Viewer

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

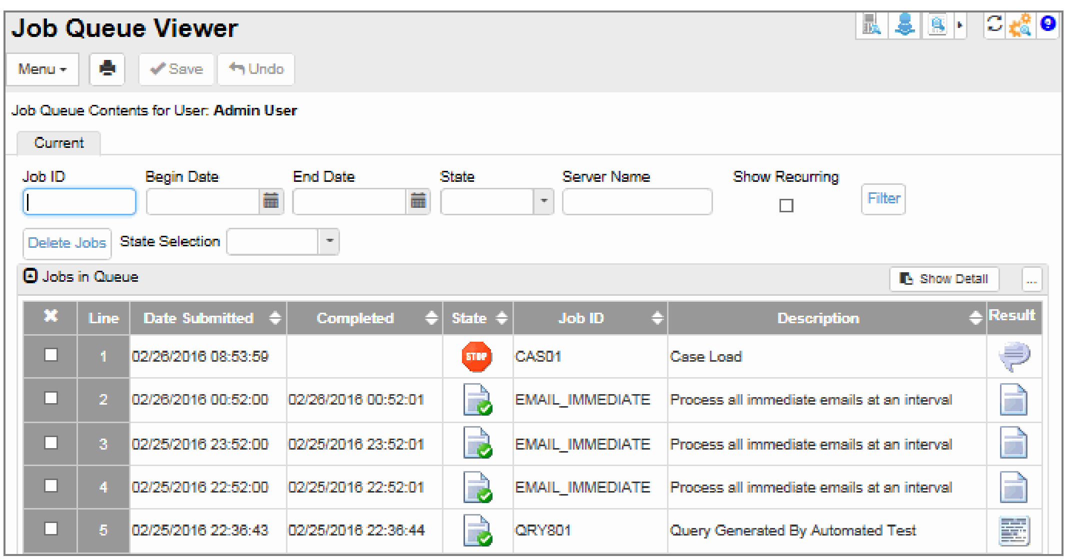


Job Queue

1. Click to view the Job Queue.

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

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



Job Queue Viewer Screen

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

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

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

Deleting Jobs

From the Job Queue Viewer screen

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