



Synergy[®] SIS

Enrollment Training Module



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October 2015

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Course Description

In this training course, you will learn how to add, inactivate, no show, transfer, concurrently enroll, and edit student data in Synergy SIS. You will also learn about the different reports available that relate to the Student screen.

Expected Outcomes

After completing this course participants will be able to:

- Perform searches for Students
- Enroll new students
- No Show students that have left the district prior to the new school year
- Inactivate students that have moved either in district or out of district
- Transfer students within district
- Concurrently enroll students at two schools in the district
- Edit Student records
- Locate and generate reports

Practicing Good Data Governance

Having student enrollment processes in place will help reduce the creation of duplicate students. Each school district should establish the following student enrollment processes:

- Uniform district process for collecting accurate and complete demographic data for each student
- Exact standards on how to enter information:
 - Using Upper and Lower case when typing a name
 - Proper use of suffixes
 - Hyphenated names
 - Apostrophes in names
- A list of potential questions to ask during enrollment, including name changes, previous services from the school district, etc.
- A defined and systematic approach for avoiding the entry of duplicate student data.
- A defined and systematic approach for removing duplicate student data when it is discovered.

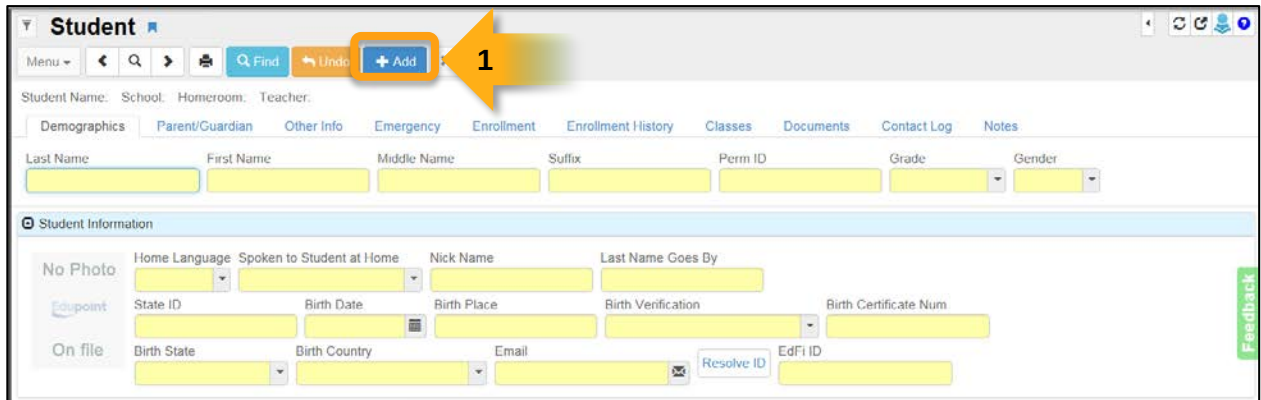
The **Student** view is for entering or viewing student data details for a particular student. This is the screen from which you initiate the enrollment of a student, and is the most commonly used screen.

Enrolling a New Student

Go to **Synergy SIS > Student > Student**

Or, you may type “**Student**” in the Quick Launch field

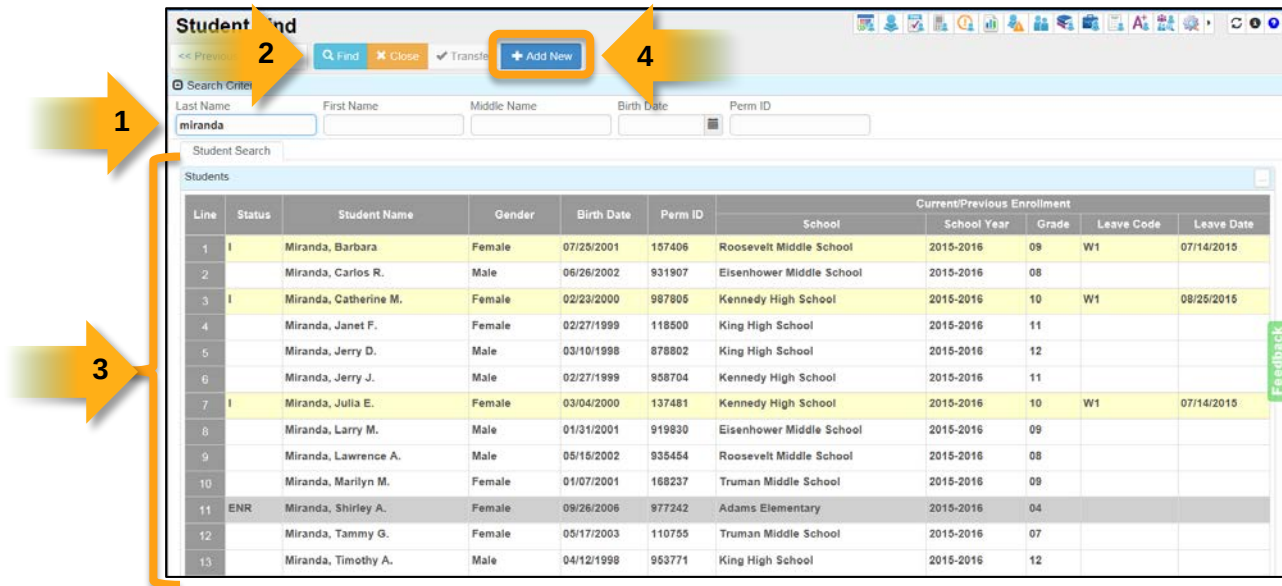
The following steps will guide you through the process of enrolling a new student. During the Student Add process you do not need to click the **Save** button until all tabs and mandatory fields are populated.



1. Click the **Add** button at the top of the Student screen (above). The **Student Find** screen displays (below).

To avoid a duplicate entry, there are some best practices to follow:

Search on one field at a time - the less information you enter into the search fields, the better. The **Birth Date** field overrides all other fields. If you enter a **Birth Date** and a **Last Name**, it will still only search for the **Birth Date**. If you search on the student's last name, and the student is not listed in the search results, then it is a critical part of the process to search on a different field. Clear the **Last Name** field, and use one of the other fields like **First Name** or **Birth Date**. Again, search one field at a time for best results.



Student Find

Search Criteria

Last Name: First Name: Middle Name: Birth Date: Perm ID:

Find Close Transfer Add New

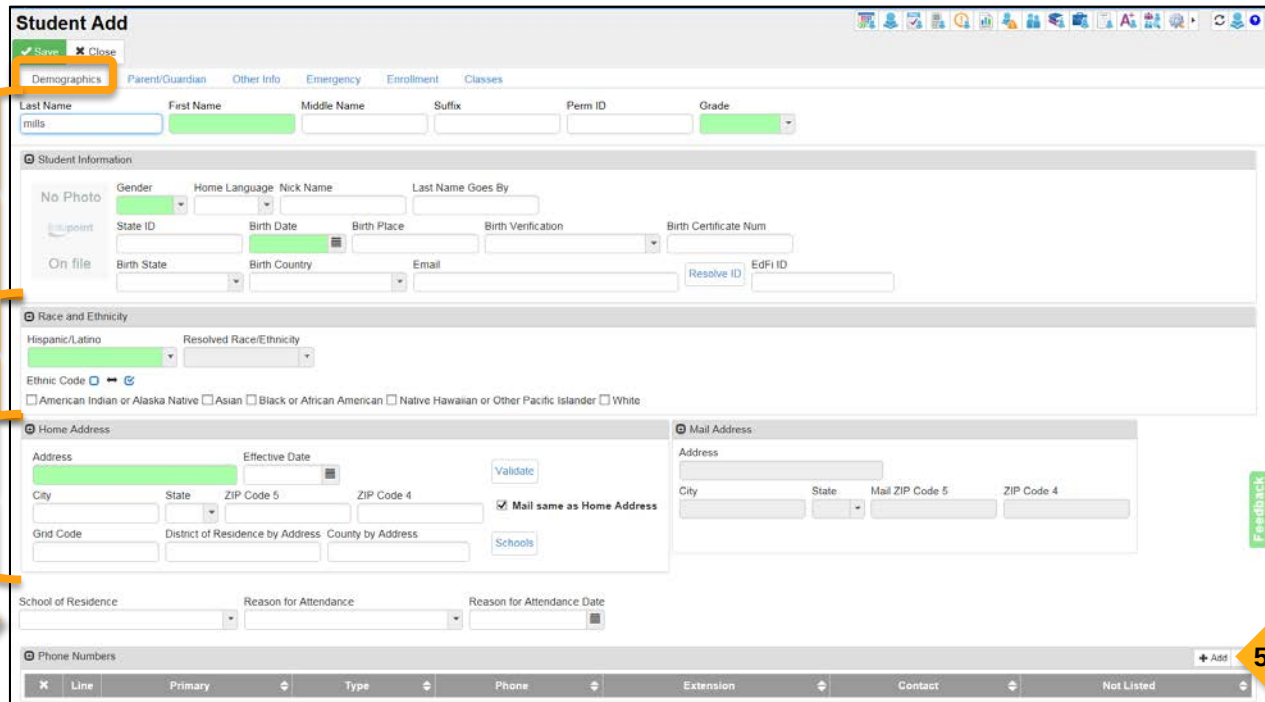
Students

Line	Status	Student Name	Gender	Birth Date	Perm ID	Current/Previous Enrollment				
						School	School Year	Grade	Leave Code	Leave Date
1	I	Miranda, Barbara	Female	07/25/2001	157406	Roosevelt Middle School	2015-2016	09	W1	07/14/2015
2		Miranda, Carlos R.	Male	06/26/2002	931907	Eisenhower Middle School	2015-2016	08		
3	I	Miranda, Catherine M.	Female	02/23/2000	987805	Kennedy High School	2015-2016	10	W1	08/25/2015
4		Miranda, Janet F.	Female	02/27/1999	118500	King High School	2015-2016	11		
5		Miranda, Jerry D.	Male	03/10/1998	878802	King High School	2015-2016	12		
6		Miranda, Jerry J.	Male	02/27/1999	958704	Kennedy High School	2015-2016	11		
7	I	Miranda, Julia E.	Female	03/04/2000	137481	Kennedy High School	2015-2016	10	W1	07/14/2015
8		Miranda, Larry M.	Male	01/31/2001	919930	Eisenhower Middle School	2015-2016	09		
9		Miranda, Lawrence A.	Male	05/15/2002	935454	Roosevelt Middle School	2015-2016	08		
10		Miranda, Marilyn M.	Female	01/07/2001	168237	Truman Middle School	2015-2016	09		
11	ENR	Miranda, Shirley A.	Female	09/26/2006	977242	Adams Elementary	2015-2016	04		
12		Miranda, Tammy G.	Female	05/17/2003	110755	Truman Middle School	2015-2016	07		
13		Miranda, Timothy A.	Male	04/12/1998	953771	King High School	2015-2016	12		

In the **Search Criteria** group box:

1. Enter **Last Name**, **First Name**, and/or **Birthdate** information.
2. Click the **Find** button at the top of the window.
3. In the **Students** grid, the search results display a list of records matching the criteria entered. (Results may yield information such as Enrollment Restrictions (ENR), Inactive students (I), or students who have been No Showed (displayed with Blue highlighting and no Enrollment Information). Names highlighted in yellow indicate a student who, at some point, was enrolled in your district. Do not create a new student record for this student. Instead, use the Transfer Student procedure detailed later in this manual. **Add page number?**
4. After checking to ensure the student is not already in Synergy SIS, click **Add New** at the top of the **Student Find** screen to add a new record.

The **Student Add** screen displays any information you entered in the **Student Find** screen.



The screenshot shows the 'Student Add' form with the following sections and fields:

- Demographics** (Tab 1): Last Name, First Name, Middle Name, Suffix, Perm ID, Grade.
- Student Information** (Tab 2): Gender, Home Language, Nick Name, Last Name Goes By, State ID, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, Resolve ID, EdFi ID.
- Race and Ethnicity** (Tab 3): Hispanic/Latino, Resolved Race/Ethnicity, Ethnic Code, American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, White.
- Home Address** (Tab 4): Address, Effective Date, City, State, ZIP Code 5, ZIP Code 4, Gnd Code, District of Residence by Address, County by Address, Mail same as Home Address, Schools.
- Mail Address** (Tab 5): Address, City, State, Mail ZIP Code 5, ZIP Code 4.
- Phone Numbers** (Tab 6): School of Residence, Reason for Attendance, Reason for Attendance Date.

Numbered callouts point to the following fields:

1. Demographics tab
2. Gender field
3. Home Address tab
4. Ethnic Code field
5. Add button

On the **Student Add** screen, the fields highlighted in **green** are mandatory. Fields that are mandatory for State Reporting are shown in the Field Name as **Bold** and **Red**. Although not highlighted, **Ethnic Code** is also mandatory.

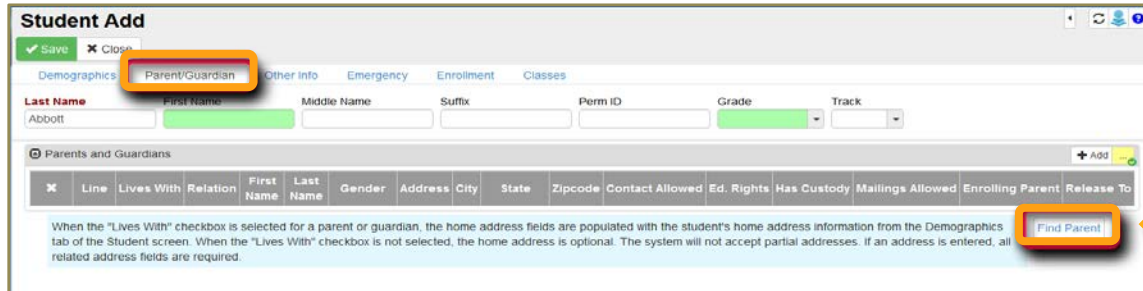
The **Demographics** tab:

1. Enter as much information as you have available. That is why it is important to have a uniform process for collecting complete demographic data for each student. **Gender** – If a student is *Non Binary*, select the **Non-Binary Gender** in the drop-down that displays. **Note:** The number in the **Perm ID** field should be generated automatically. If not, the District should have instructions for determining the number to enter. The **Email** field here is for the student's email address, if they have one, or if the school creates one for them. Email addresses for parents are added elsewhere.
2. In the **Race and Ethnicity** group box, check the box of the correct **Ethnic Code** (mandatory).

3. In the **Home Address** group box, enter the full address and then click the **Validate** button. **NOTE:** If the district has setup the *Address Validation Rules*, the **City**, **State**, **Zip Code**, and **Grid Code** fields are auto-populated in the **Home Address** group box along with the **School of Residence** to ensure it's a valid address.
4. If the **School of Residence** is different than the **School of Attendance** the **Reason for Attendance** and **Reason for Attendance Date** must be filled out.
5. Add student phone numbers here. Parent phone numbers are entered elsewhere.

The **Parent/Guardian** tab:

A search for the parents' names must be performed to make sure they are not already in the system.



Student Add

Save Close

Demographics **Parent/Guardian** Other Info Emergency Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade Track

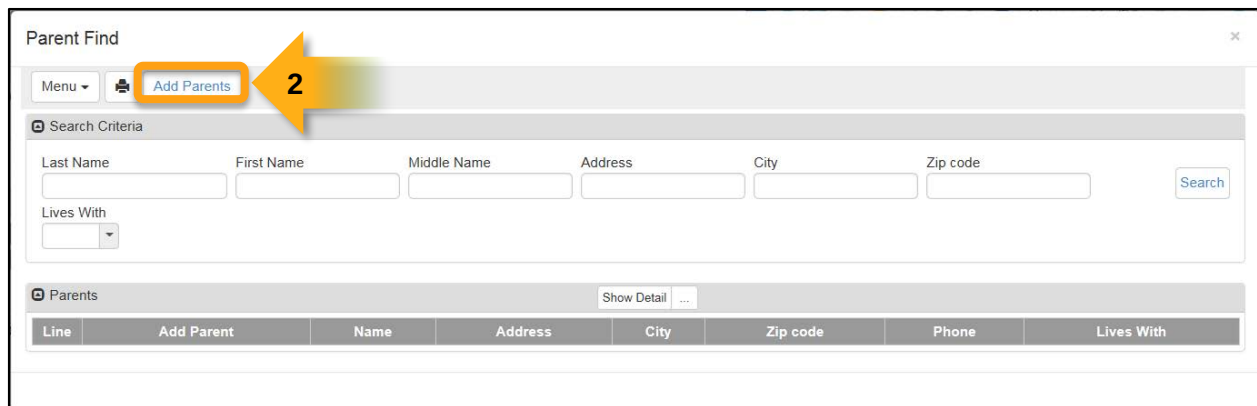
Abbott

Parents and Guardians

Line	Lives With	Relation	First Name	Last Name	Gender	Address	City	State	Zipcode	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Enrolling Parent	Release To
When the "Lives With" checkbox is selected for a parent or guardian, the home address fields are populated with the student's home address information from the Demographics tab of the Student screen. When the "Lives With" checkbox is not selected, the home address is optional. The system will not accept partial addresses. If an address is entered, all related address fields are required.															

Find Parent

1. Click the **Find Parent** button. The system will automatically search for names that have the same **Home Address** as the student. If there are no matches, the **Parent Find** window will display blank.



Parent Find

Menu Add Parents

Search Criteria

Last Name First Name Middle Name Address City Zip code

Lives With

Search

Parents

Show Detail

Line	Add Parent	Name	Address	City	Zip code	Phone	Lives With
------	------------	------	---------	------	----------	-------	------------

Quick Reference Guide (QRG)

Add a Student Quick Reference Guide (QRG) EN 01

This document will guide you through the process of adding a student to Synergy SIS

Business Rules that apply are as follows:

Any student who enrolls in a school to attend class, even for a portion of one school day, must be enrolled using the Student screen in Synergy SIS.

Users must be sure to keep the student ID the same for the entire time the student is enrolled whenever possible.

Always check the System Filter Icon to be sure there are no filters before doing enrollment transactions.

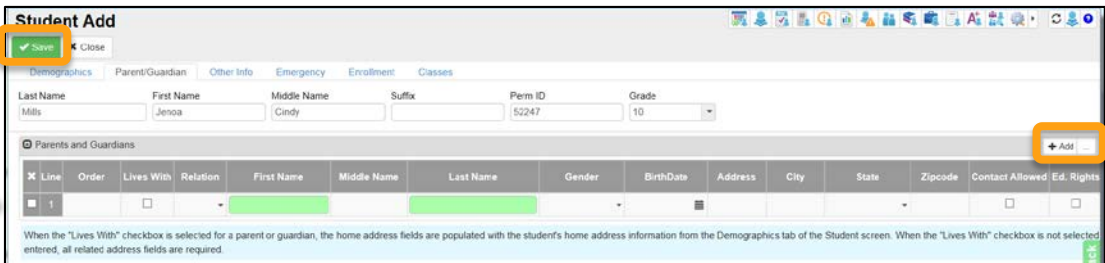
PATH Synergy SIS → Student → Student

How to:	Steps:
Add a student	- Click Add – The Student Find screen opens. - Enter partial or complete data (use Birth Date or Perm ID whenever possible) - Click Find or press ENTER. A list that matches criteria entered displays. - If student name appears on list and highlighted in yellow, see <u>TG EN 02 QRG – Transfer a Student</u>. ALTERNATIVELY, if student name does not appear on list, proceed to next step. - Click Add New. - The Student Add screen opens in a new window.
Enter Demographic information	On the Demographics tab, enter mandatory green field information. If other information is available, you may enter it at this time.
NOTE: The Student Add screen does not contain all of the tabs and fields available in the Student Screen.	
Parent/Guardian information	Note: At least one parent must be associated with the student. It is necessary to conduct a search to make sure the parent/guardian is not already in the system.
Add Existing Parent/Guardian Record To New Student	- Click Find Parent. The Parent Find screen opens. - Enter search criteria in any white field. Click search. - Locate the parent and select Add Parent in the row containing that person's name (You can select more than one parent). - Click Add Parents. - Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.. - Click Save.

Add New Parent/Guardian Record To New Student	- Click Find Parent. If a parent does not exist with same address as student, Synergy SIS displays Parent Find window where a search can be performed on parent last name. - Type parent Last Name. - Click Search to the right. Notice last name entered could be contained anywhere in actual last name. If "Smith" is typed into Last Name field, program displays all names that contain word "Smith" such as Carr-Smith, Desmith or Silversmith and actual name "Smith" displays alphabetically on list after these names. - If parent displays on list, check Add Parent next to name. - Click Add Parents. Parent/Guardian tab displays with parent - Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, and/or Mailings Allowed. - If parent name does not display on list, click red "X" in upper right hand corner to close window - Click Add on Parents and Guardians grid. - Type Order for which this parent/guardian displays on list. - Check Lives With if student Lives With this parent/guardian. - Select Relation from drop-down. - Enter parent/guardian First Name, Middle Name (optional), Last Name - Select Education Level from drop-down, if applicable. - Select appropriate Contact Allowed, Ed Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.
Enter Other Info information	- Select Other Info tab. - Complete all required green fields and any other available data.
Enter Emergency information	- Select the Emergency tab. - Complete all available data now or later.
Enter Enrollment information	- Select the Enrollment tab. - Complete the required green fields. Enter Date if different from current date - Select appropriate Enter Code from drop down list. - Select Grade level - FTE – defaults to 1.0 or full time
Note: After enrollment is saved, a student's schedule can be entered on the Classes Tab. Use the Chooser to select the classes; modify the Enter Date if needed. Click Save.	
Maintaining Student Data after student enrollment	Review the field types used on the Student screen and decide how your District Policy will dictate their use.

Add New Parent Record:

- To add a new parent record, click the **Add Parents** button (above).
- You are returned to the **Student Add** screen and a blank line is added to the Parents and Guardians grid (below). Enter as much information as you have, at a minimum completing the mandatory fields highlighted in green.



8

3-6

7

- In the **Order** column enter the order of contact for the parents.
- Check the **Lives With** box, if the parent lives with the student. You do not need to enter the Address information if this box is checked.
- Check the appropriate boxes - Contact Allowed, Ed. Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and Financial Resp. **NOTE:** Ed. Rights and Has Custody boxes allow the parent to access the student's information in ParentVUE. Mailings Allowed does not need to be checked if the parent lives with the student. The Financial Responsibility box allows the parent to use any payment system that is set up through the Fees screen, in order to pay for supplies, programs, or services, etc.
- Click the **Add** button and enter another parent's information if needed.
- When finished, click **Save**.

Associate Existing Parent Record to Student

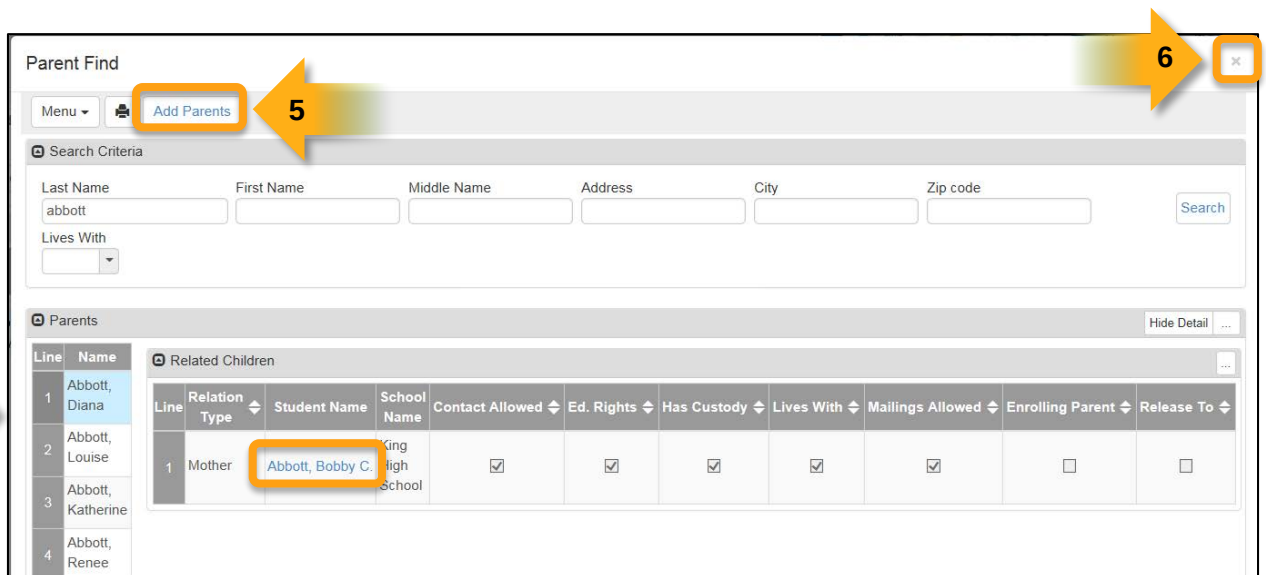
1. After you click the **Find Parent** button, the system will automatically search for names that have the same **Home Address** as the student. If there is a match, the **Parent Find** window will display results in the **Parents** grid.
2. You may also enter search criteria in the **Search Criteria** group box and click the **Search** button.



The screenshot shows the 'Parent Find' window. At the top, there is a 'Menu' dropdown and an 'Add Parents' button. Below this is the 'Search Criteria' section with fields for Last Name, First Name, Middle Name, Address, City, and Zip code, along with a 'Search' button. A yellow arrow labeled '2' points to the 'Search' button. Below the search criteria is a 'Parents' grid. A yellow arrow labeled '1' points to the grid header, and another yellow arrow labeled '3' points to the 'Add Parent' checkbox in the first row of the grid.

Line	Add Parent	Name	Address	City	Zip code	Phone	Lives With
1	☒	Abbott, Diana	2060 N Center St #440	Mesa	85612	480-555-0834	☒
2	☐	Abbott, Louise	2060 N Center St #440	Mesa	85612	480-555-0834	☒
3	☐	Abbott, Katherine	10726 E Oasis Dr	Tempe	85660		☒
4	☐	Abbott, Renee	2123 N Gentry	Tempe	85662		☐
5	☐	Abbott, Todd					☐
6	☐	Abbott, Jerry					☐

3. If there are matches, locate the parent in the grid and check the **Add Parent** checkbox in the row for that record. More than one parent may be selected.
4. To see the details of a parent record before adding, double-click the line number of the desired record. The details of the related children (to this parent) display on the right side of the **Parents** grid (below). The student name is a hyperlink to that student's record.



The screenshot shows the 'Parent Find' window with the 'Parents' grid. A yellow arrow labeled '4' points to the first row of the grid. A yellow arrow labeled '5' points to the 'Add Parents' button. A yellow arrow labeled '6' points to a close button in the top right corner. Below the 'Parents' grid, there is a 'Related Children' section with a table showing details for the selected parent.

Line	Name
1	Abbott, Diana
2	Abbott, Louise
3	Abbott, Katherine
4	Abbott, Renee

Line	Relation Type	Student Name	School Name	Contact Allowed	Ed. Rights	Has Custody	Lives With	Mailings Allowed	Enrolling Parent	Release To
1	Mother	Abbott, Bobby C.	King High School	☒	☒	☒	☒	☒	☐	☐

5. If the parent is the correct match, click the **Add Parents** button.
6. If the parent is not the correct match, click the **X** to close the **Parent Find** window.
7. Click **Save** on the **Student Add** screen before moving to the next tab.

Quick Reference Guide (QRG)

Add Parent/Guardian

Quick Reference Guide (QRG) EN 7

Each student **MUST** have at least one (1) parent/guardian record entered at the time of enrollment.

PATH Synergy SIS → Student → Student → Parent/Guardian tab

How to:	Steps:
Add Existing Parent/Guardian Record To New Student	- Click Find Parent. If a parent exists with same address as student, Synergy SIS displays parent with Add Parent selected on Parents grid. - Click Add Parents. The Parent/Guardian tab displays with parent. Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.
Add New Parent/Guardian Record To New Student	- Click Find Parent. If a parent does not exist with same address as student, Synergy SIS displays Parent Find window where a search can be performed on parent last name. - Type parent Last Name. - Click Search to the right. Notice last name entered could be contained anywhere in actual last name. If "Smith" is typed into Last Name field, program displays all names that contain word "Smith" such as Carr-Smith, Desmith or Silversmith and actual name "Smith" displays alphabetically on list after these names. - If parent displays on list, check Add Parent next to name. - Click Add Parents. Parent/Guardian tab displays with parent - Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, and/or Mailings Allowed. - If parent name does not display on list, click red "X" in upper right hand corner to close window - Click Add on Parents and Guardians grid. - Type Order for which this parent/guardian displays on list. - Check Lives With if student Lives With this parent/guardian. - Select Relation from drop-down. - Enter parent/guardian First Name, Middle Name (optional), Last Name - Select Education Level from drop-down, if applicable. Select appropriate Contact Allowed, Ed Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.
NOTE: If a student Lives With a parent then Mailings Allowed does not need to be checked.	

Other Info tab: the District will decide which, if any, fields will be required. Complete with all the available data.

Student Add

Save Close

Demographics Parent/Guardian **Other Info** Emergency Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade Track

School Information

Bus Route To School Bus Route From School Locker Number IVEP Allow Medication

Extend Learning Program Vocational Has Changed Flag Allow Tylenol

Other Information

Enrollment Restriction Enrollment Restriction Date Custody

Expected Graduation Year Original Enter Date Final Withdrawal Date Immigration Date

Paych Records Special Ed Screening Date Family Code Dwelling Type Internet Authorization

Us Citizen Chronic Illness Excessive Debt Indicator Directory List Exclude Migrant General Equivalency Diploma Teen Parent

Has Internet At Home Counselor Name ELL Code ELL Date

Next Year

New Year Action Next Grade Level Next School Next Enter Code Schools

Registration

Registration Last Updated Registration Received Significant Student Data Change

Authorization

Deny Photo/Interview Internet Authorization Statement Of Awareness

User Codes

Notes

Prev Year

Prev School Entity ID Student ID Generated by Prev School Prev State Code

Graduation Information

Graduation Date Graduation Status Ninth Grade Entry Year

Transportation

Transport Code Transportation Request Date Transportation Start Date

Pick Up Information

Transportation Type Bus Route Bus Stop

Pick Up Time Pick Up Location Type

Address City State Zip Code

Comment

Transportation Reason Code Transportation Reason Date

Drop Off Information

Transportation Type Bus Route Bus Stop

Drop Off Time Drop Off Location Type

Address City State Zip Code

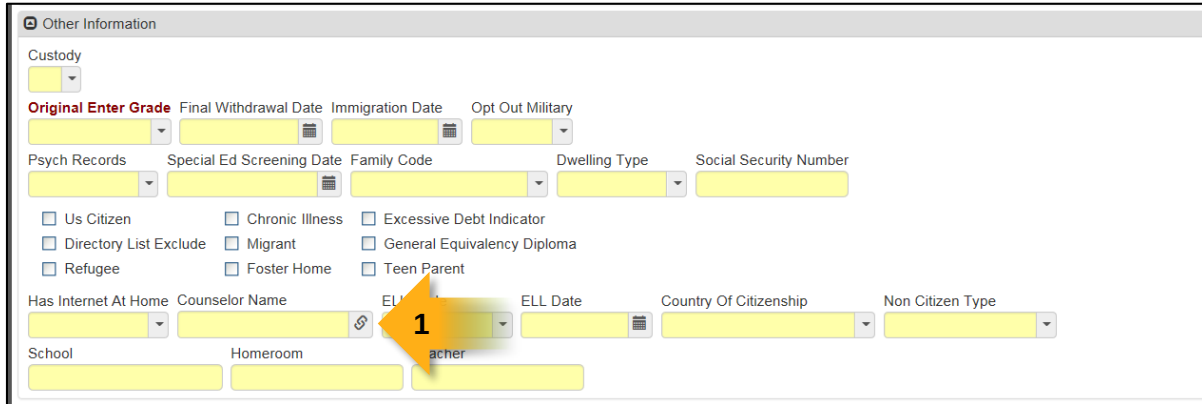
Comment

Transportation Reason Code Time off Date

Additional Addresses

Line	Type	Location Type	School	Address	City	State	Zip	Transport Code	Transport Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat

1. In the **Other Information** group box, if you know the student's assigned Counselor, click the  icon to display the **Find: Staff** screen.



Other Information

Custody

Original Enter Grade Final Withdrawal Date Immigration Date Opt Out Military

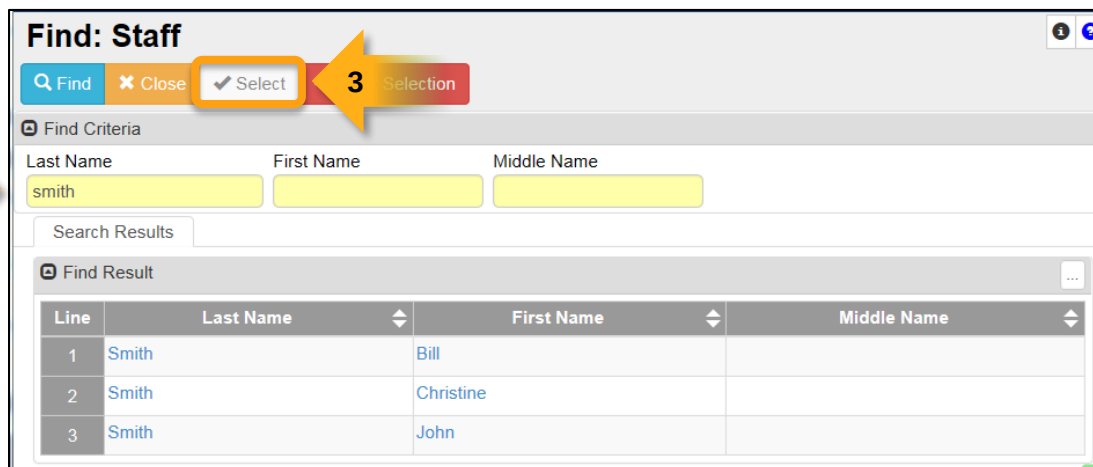
Psych Records Special Ed Screening Date Family Code Dwelling Type Social Security Number

☐ Us Citizen ☐ Chronic Illness ☐ Excessive Debt Indicator
☐ Directory List Exclude ☐ Migrant ☐ General Equivalency Diploma
☐ Refugee ☐ Foster Home ☐ Teen Parent

Has Internet At Home Counselor Name  ELL ELL Date Country Of Citizenship Non Citizen Type

School Homeroom Teacher

2. Enter the search criteria in the **Find Criteria** group box.
3. Locate the counselor and click **Select** to add the name to the Student's record.



Find: Staff

Find Close Selection

Find Criteria

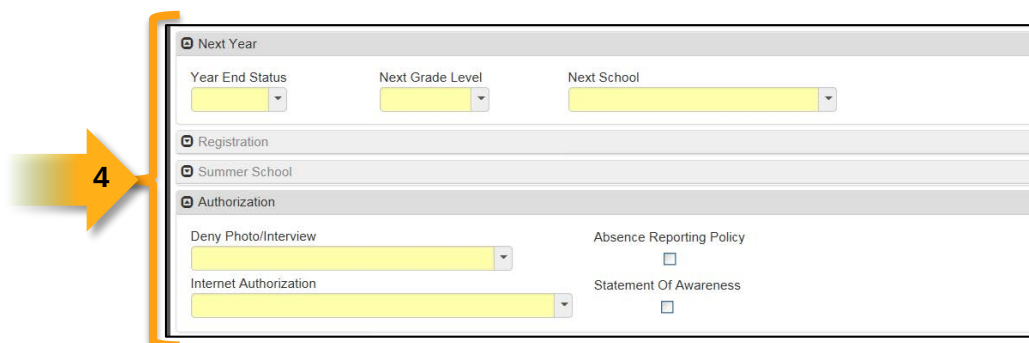
Last Name First Name Middle Name

Search Results

Find Result

Line	Last Name	First Name	Middle Name
1	Smith	Bill	
2	Smith	Christine	
3	Smith	John	

4. Other sections the District may require to be completed include **Next Year** information and **Authorization** information, which include **Photo** and **Internet** authorizations.



Next Year

Year End Status Next Grade Level Next School

Registration

Summer School

Authorization

Deny Photo/Interview Absence Reporting Policy ☐

Internet Authorization Statement Of Awareness ☐

Quick Reference Guide (QRG)

Concurrent Students Quick Reference Guide (QRG) EN 03

Concurrent students are students enrolled in two or more schools in the district at the same time. One example would be a student who is enrolled at their home school part of the day and a district vocational school part of the day. Check concurrent students to be sure they are truly concurrent and do not have a full schedule at your school.

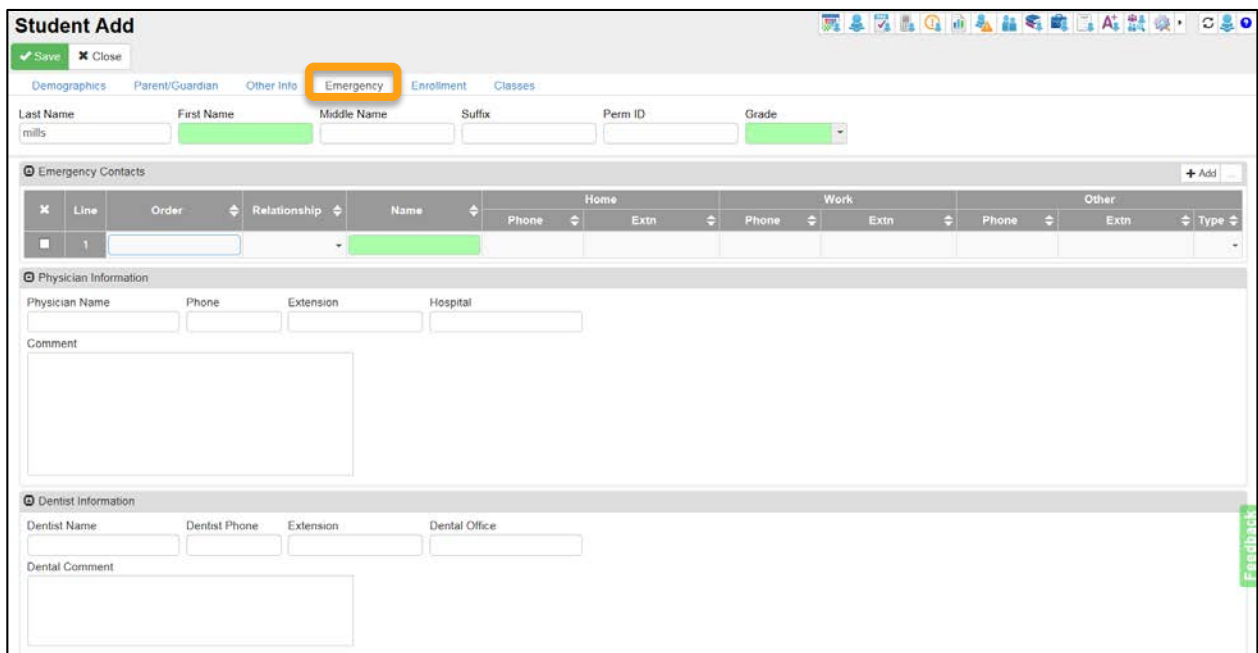
PATH Synergy SIS → Student → Student

How to:	Steps:
Add Concurrent Students	- Click Add. - Enter Student Information. - Click Find or press ENTER key. A list of students that meet criteria entered displays. - Click Line Number of student to be added concurrently student is highlighted. - Click Transfer – Student Add screen displays.
Demographics Tab	Verify mandatory fields: (green) Student's legal name, grade, gender, ethnic code, birth date, and home address.
Other Info Tab	- If New Year Rollover has been performed, fill in "New Year Action" and Next Grade and Next School. - Select any Secondary Ethnicities that apply.
Enrollment Tab	- Enter date MUST be one (1) school date later than the Home school's enter date. - Click Save.
NOTE: Concurrent students are identified as Concurrent in ADA/ADM field. Do not change.	
Withdrawing concurrent students MUST be inactivated in Student screen	- Click Menu at top of screen. - Select Inactivate Student. - Select appropriate W code (matching the Home school) from drop-down list. - Click Save.

The Emergency tab:

Information on this tab may be entered at a later date if needed. Your district may have designated certain fields as mandatory and these need to be completed at this time.

1. Click the **Add** button in the **Emergency Contacts** grid to enter any person's contact information that is not already listed on the **Parent/Guardian tab**. A blank line is added to the grid.
2. Add physician and dentist information if needed.
3. Click **Save**.



Student Add

✓ Save ✕ Close

Demographics Parent/Guardian **Emergency** Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade

mills [blank] [blank] [blank] [blank] [blank]

Emergency Contacts + Add

Line	Order	Relationship	Name	Home		Work		Other		Type
				Phone	Extn	Phone	Extn	Phone	Extn	
1	[blank]	[blank]	[blank]	[blank]	[blank]	[blank]	[blank]	[blank]	[blank]	[blank]

Physician Information

Physician Name Phone Extension Hospital

[blank] [blank] [blank] [blank]

Comment

[blank]

Dentist Information

Dentist Name Dentist Phone Extension Dental Office

[blank] [blank] [blank] [blank]

Dental Comment

[blank]

Feedback

Quick Reference Guide (QRG)

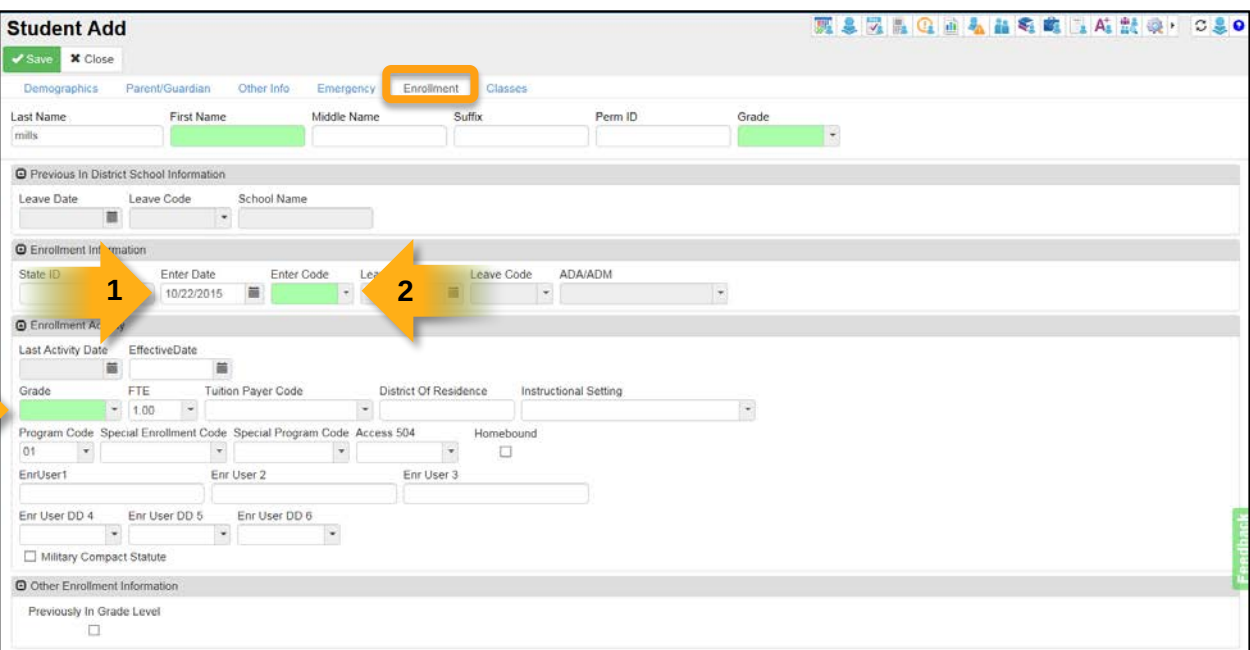
Emergency Information

Quick Reference Guide (QRG) EN 08

PATH Synergy SIS → Student → Student → Emergency tab

How to:	Steps:
Verify/Enter Emergency information	- Go to Emergency tab. Emergency Contacts - Click Add on Emergency Contacts bar to input name, relationship, and phone number(s) of someone other than parent to contact in an emergency. - Select Language from drop-down. - Check Release To if student can be released to this Emergency Contact Physician Information - Input physician, hospital, and insurance information. There is a box for optional comments. Dentist Information - Input dentist's name, phone number, and office address. There is a box for optional comments. Contact Order - This populates after the Student record is saved.

The Enrollment tab:



The screenshot shows the 'Student Add' form with the 'Enrollment' tab selected. The form includes sections for Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, and Classes. The Enrollment section contains fields for State ID, Enter Date, Enter Code, Leave Code, ADA/ADM, Last Activity Date, Effective Date, Grade, FTE, Tuition Payer Code, District Of Residence, Instructional Setting, Program Code, Special Enrollment Code, Special Program Code, Access 504, Homebound, Enr User 1, Enr User 2, Enr User 3, Enr User DD 4, Enr User DD 5, Enr User DD 6, Military Compact Statute, and Other Enrollment Information. Numbered callouts indicate the following steps: 1. Enter Date field, 2. Enter Code dropdown, 3. Grade field, and 4. Save button.

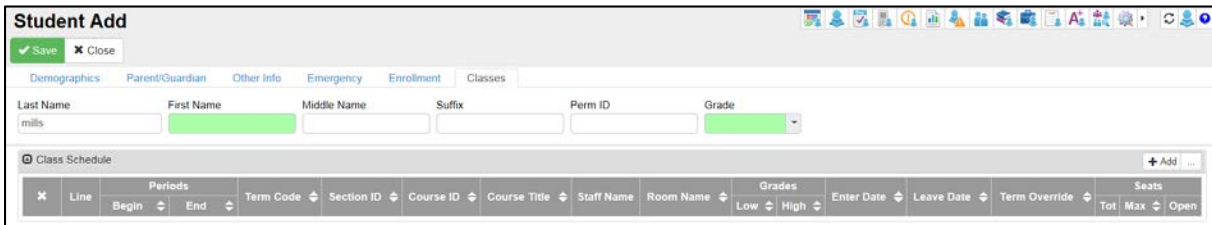
1. In the **Enrollment Information** group box, be sure to enter the correct enrollment date using the **Enter Date** field. This field automatically populates today's date, but may be changed. **NOTE:** The **Enter Date** should be the day the student begins physically attending classes.
2. Select the **Enter Code** from the dropdown.
3. Enter the **Grade** if not already displayed. Enter the data for any other mandatory fields that are displayed.
4. Click **Save**.

Quick Reference Guide (QRG)**Enrollment History Information****Quick Reference Guide (QRG) EN 09 QRG****PATH Synergy SIS → Student → Student → Enrollment History tab****Correct Enrollment History Information**

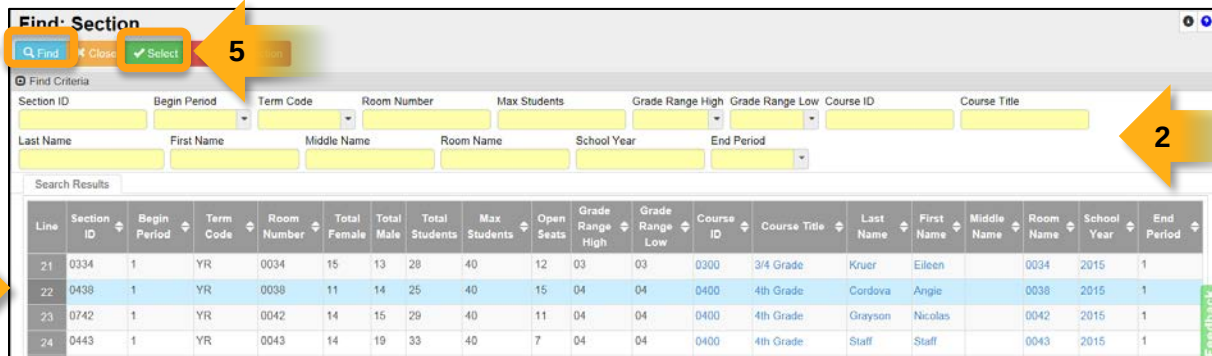
- Go to **Enrollment History** tab.
- On the line of the record to correct, click either the **Enter Date** or **Enter Code** link. The Enrollment History screen opens.
- Double-click the **line** number to be edited. The detailed view displays on right.
- Change information on **Enrollment Activity** grid.
- Click **Save**.

The Classes tab

Click the **Classes** tab if the student needs to be enrolled in classes. **NOTE:** Elementary Schools use this tab to add the student's homeroom class. Secondary schools typically **Do Not** use the **Classes tab** to schedule classes.

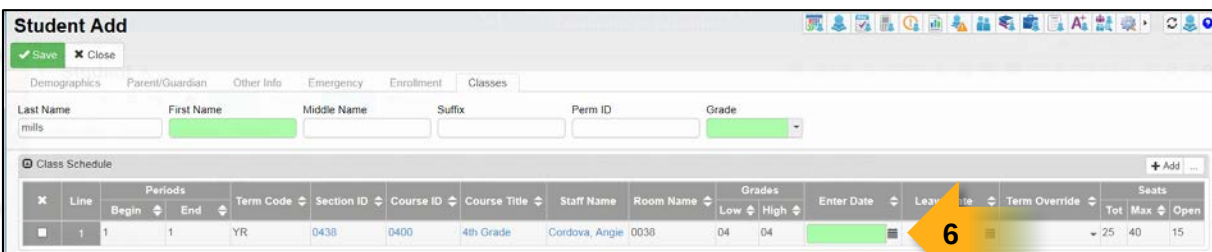


1. Click **Add** on the **Class Schedule** bar. The **Find: Section** screen opens.



Line	Section ID	Begin Period	Term Code	Room Number	Total Female	Total Male	Total Students	Max Students	Open Seats	Grade Range High	Grade Range Low	Course ID	Course Title	Last Name	First Name	Middle Name	Room Name	School Year	End Period
21	0334	1	YR	0034	15	13	28	40	12	03	03	0300	3/4 Grade	Kruer	Eileen		0034	2015	1
22	0438	1	YR	0038	11	14	25	40	15	04	04	0400	4th Grade	Cordova	Angie		0038	2015	1
23	0742	1	YR	0042	14	15	29	40	11	04	04	0400	4th Grade	Grayson	Nicolas		0042	2015	1
24	0443	1	YR	0043	14	19	33	40	7	04	04	0400	4th Grade	Staff	Staff		0043	2015	1

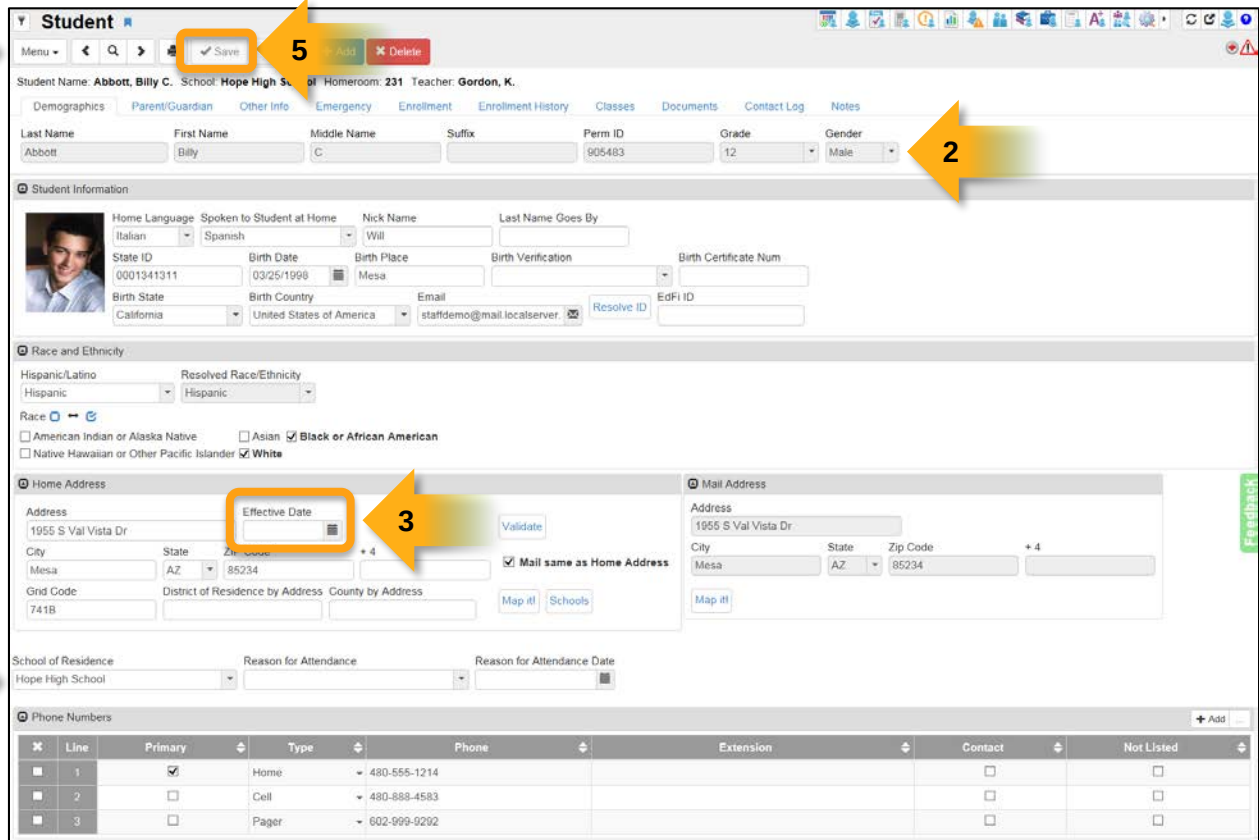
2. Enter partial or complete data in any **Find Criteria** field.
3. Click **Find**. The Find Result grid displays a list of records matching the criteria entered.
4. Click on the line number to highlight the desired record.
5. Click **Select**. The **Find: Section** screen closes and the record selected displays in the **Class Schedule** grid.



6. Once the class is added, complete the **Enter Date** (MMDDYY) or click  and select the date the student will be physically attending the class.
7. Repeat Steps 2-6 for each class you wish to add.
8. Click the **Save** button. The student record has been created.

Editing New Student Information

After a student record has been created, changes and additions may be made to the student's information. When editing information about a student, each tab must be edited separately and all changes saved before switching to a new tab.



The screenshot shows the 'Student' form in the Synergy Education Platform. The form is divided into several tabs: Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, Documents, Contact Log, and Notes. The 'Demographics' tab is currently selected. The form contains various fields for student information, including Name, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, EdFi ID, Home Address, Mail Address, School of Residence, Reason for Attendance, Reason for Attendance Date, and Phone Numbers. Numbered callouts indicate the following steps:

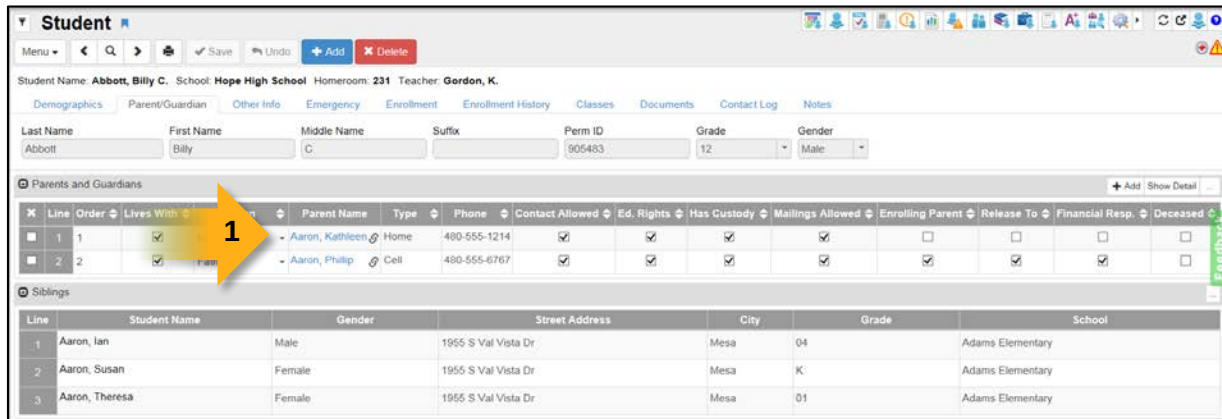
1. Click on the 'Edit' button (indicated by a yellow arrow pointing to the 'Edit' button in the top right corner).
2. Click on the 'Effective Date' field (indicated by a yellow arrow pointing to the 'Effective Date' field in the 'Home Address' section).
3. Click on the 'Effective Date' field (indicated by a yellow arrow pointing to the 'Effective Date' field in the 'Home Address' section).
4. Click on the 'Effective Date' field (indicated by a yellow arrow pointing to the 'Effective Date' field in the 'Home Address' section).
5. Click on the 'Save' button (indicated by a yellow arrow pointing to the 'Save' button in the top right corner).

The **Demographics** tab:

1. Change to Update mode by clicking **Edit** at the top of the screen. If the button is not available, Update mode is already turned on.
2. Click on the data to modify in the fields with the white background and change the information as desired. Those with gray backgrounds cannot be changed.
3. On the **Demographics** tab, be sure to update the **Effective Date** when the student's Home Address is changed so other staff knows the last date the address was updated, (MMDDYY) or click  and select date.
4. Fields that were not available when adding the student, that may need to be updated, are **Spoken to Student at Home**, **School of Residence**, **Reason for Attendance**, and **Reason for Attendance Date**.
5. Click **Save**.

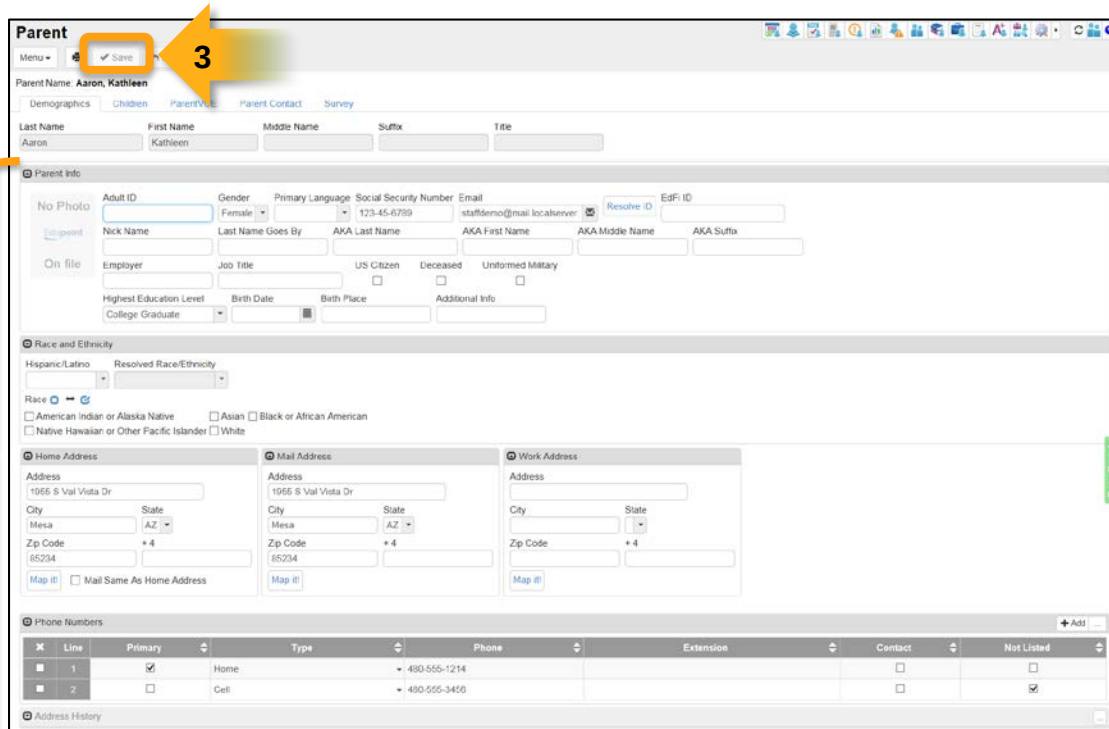
The Parent/Guardian tab:

On the **Parent/Guardian** tab, all of the same information is available as on the **Student Add** screen.



Line	Order	Lives With	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Enrolling Parent	Release To	Financial Resp.	Deceased
1	1	☒	Aaron, Kathleen	Home	480-555-1214	☒	☒	☒	☒	☐	☐	☐	☐
2	2	☒	Aaron, Philip	Cell	480-555-6767	☒	☒	☒	☒	☒	☒	☒	☐

1. To edit parent information, click on the parent name which is a hyperlink that displays the **Parent** screen.



Parent

Parent Name: [Aaron, Kathleen](#)

Demographics | **Parent Info** | Parent Contact | Survey

Last Name: Aaron | First Name: Kathleen | Middle Name: | Suffix: | Title: |

Parent Info

Adult ID: | Gender: Female | Primary Language: | Social Security Number: 123-45-6789 | Email: staffdemo@mail.localserver | EdFi ID: |

Nick Name: | Last Name Goes By: | AKA Last Name: | AKA First Name: | AKA Middle Name: | AKA Suffix: |

On file: | Employer: | Job Title: | US Citizen: ☐ | Deceased: ☐ | Uniformed Military: ☐ |

Highest Education Level: College Graduate | Birth Date: | Birth Place: | Additional Info: |

Race and Ethnicity

Hispanic/Latino: | Resolved Race/Ethnicity: |

Race: ☐ American Indian or Alaska Native ☐ Asian ☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☐ White

Home Address | **Mail Address** | **Work Address**

Address: 1955 S Val Vista Dr | Address: 1955 S Val Vista Dr | Address: |

City: Mesa | State: AZ | City: Mesa | State: AZ | City: | State: |

Zip Code: 85234 | Zip Code: 85234 | Zip Code: +4 |

Map It | ☐ Mail Same As Home Address | Map It | Map It |

Phone Numbers

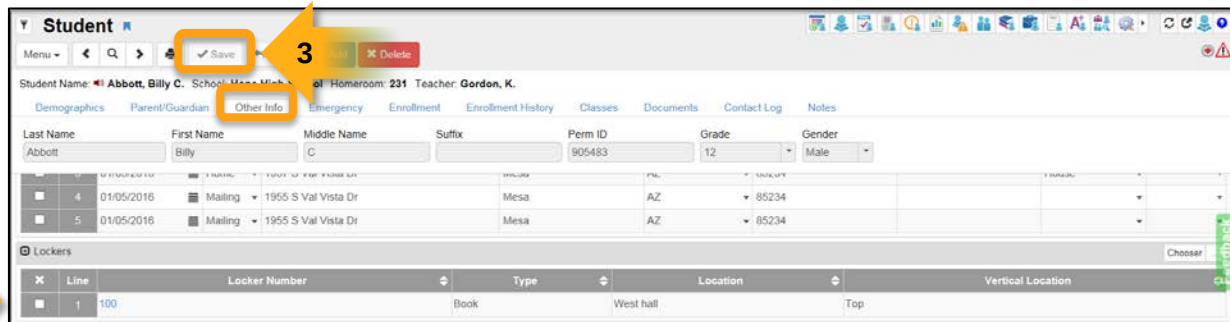
Line	Primary	Type	Phone	Extension	Contact	Not Listed
1	☒	Home	480-555-1214		☐	☐
2	☐	Cell	480-555-3456		☐	☒

Address History

2. Add or make changes to the data such as **Primary Language**, **Email Address**, **Employment info**, **Race and Ethnicity**, and/or additional **Phone Numbers**.
3. Click **Save**.

The Other Info tab

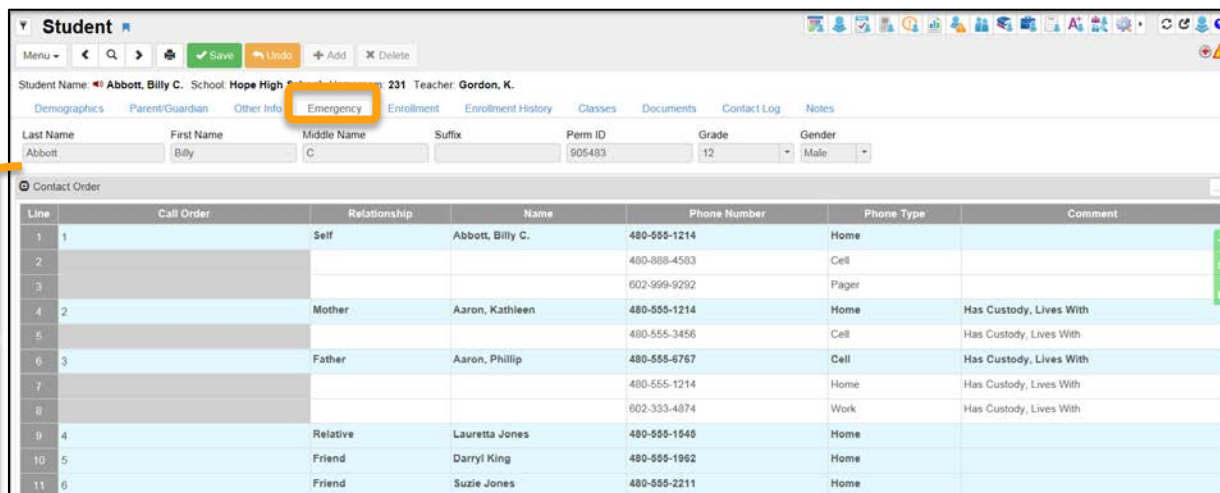
On the **Other Info** tab, all white fields are editable. The **Lockers grid** at the bottom of the tab is available only when editing a record.



The screenshot shows the 'Student' record for 'Abbott, Billy C.' with the 'Other Info' tab selected. At the bottom, there is a 'Lockers' section with a grid. A 'Chooser' button is located to the right of the grid. A yellow arrow labeled '1' points to the 'Chooser' button. Another yellow arrow labeled '2' points to the 'Lockers' grid. A third yellow arrow labeled '3' points to the 'Save' button at the top of the form.

1. Click the **Chooser** button to add a locker to the student record.
2. Enter the locker assignment information.
3. Click **Save**.

The Emergency tab



The screenshot shows the 'Student' record for 'Abbott, Billy C.' with the 'Emergency' tab selected. Below the student information, there is a 'Contact Order' table. A yellow arrow labeled '1' points to the 'Contact Order' table.

Line	Call Order	Relationship	Name	Phone Number	Phone Type	Comment
1	1	Self	Abbott, Billy C.	480-555-1214	Home	
2				480-888-4583	Cell	
3				602-999-9292	Pager	
4	2	Mother	Aaron, Kathleen	480-555-1214	Home	Has Custody, Lives With
5				480-555-3456	Cell	Has Custody, Lives With
6	3	Father	Aaron, Phillip	480-555-6767	Cell	Has Custody, Lives With
7				480-555-1214	Home	Has Custody, Lives With
8				602-333-4874	Work	Has Custody, Lives With
9	4	Relative	Lauretta Jones	480-555-1949	Home	
10	5	Friend	Darryl King	480-555-1962	Home	
11	6	Friend	Suzie Jones	480-555-2211	Home	

1. On the bottom of the **Emergency** tab, place the parents and other emergency contact persons in **Contact Order**. When the **Student Phone Numbers** screen is displayed for this student, all the contacts appear in the correct order with their information.
2. Click **Save**.

Quick Reference Guide (QRG)

Other Info Tab

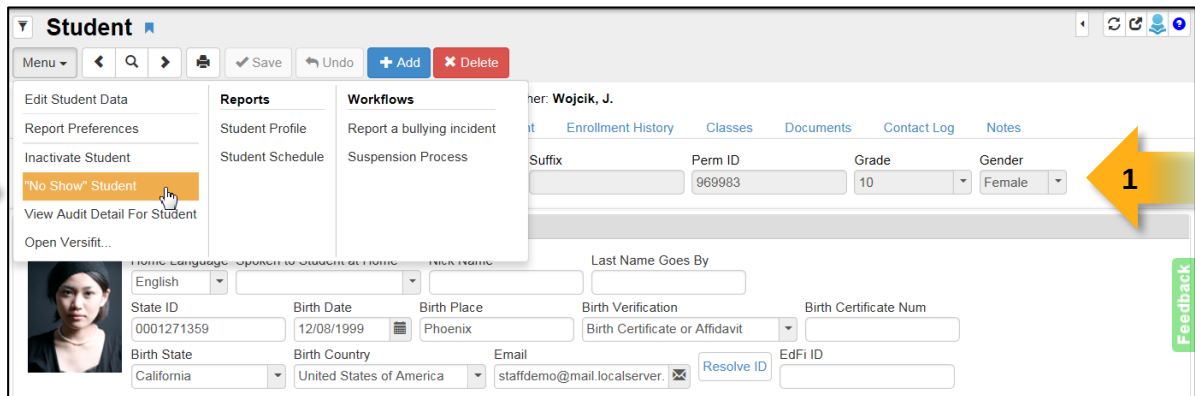
Quick Reference Guide (QRG) EN 06

PATH Synergy SIS → Student → Student → Other Info tab

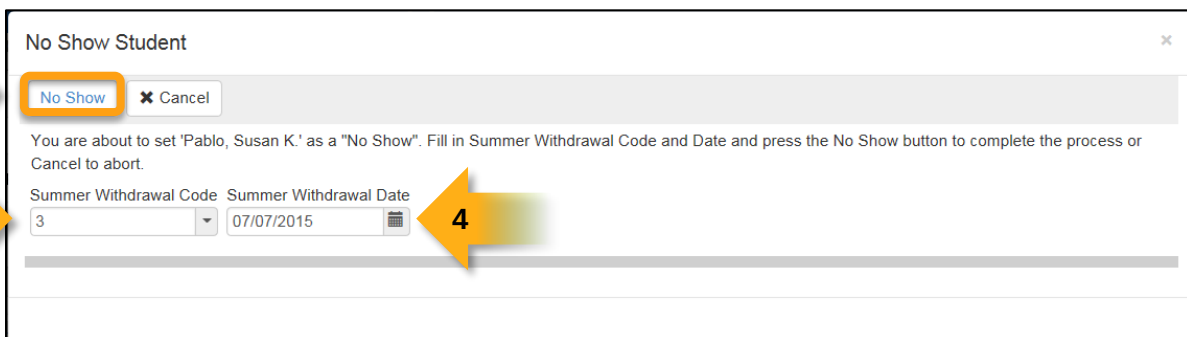
How to:	Steps:
Expand sections	Make certain all sections are expanded by clicking  in right upper corner of section.
School Information	Use bus route information provided by transportation to determine if student's address qualifies for riding bus. If student qualifies to ride bus, enter bus route both to and from school.
Other Information	- Select from provided checkboxes all items that apply to this student. - Enter Counselor. If elementary school, provide teacher's name.
Next Year (for New Year Rollover)	After New Year Rollover processing has been started, Year End Status, Next Grade Level, and Next School will be populated.
User Codes	<i>Dependent on District's final choices.</i> Complete information fields.
Graduation Information	Following New Year Rollover, Graduation Date, Graduation Status, Expected Graduation Month, and Expected Graduation Year, will be populated.
Lockers Middle or high school	This field will populate from Mass Locker Assignment within Synergy SIS once locker numbers have been imported.

Marking a Student as “No Show”

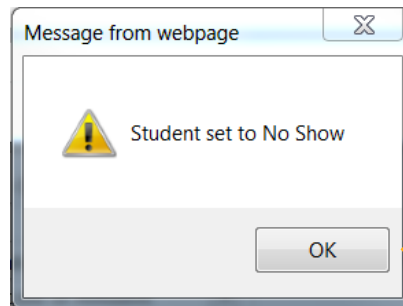
To withdraw students that enrolled but never attended a day of school go to the **Student** screen. **Note:** Only active students may be set to “No Show” status.



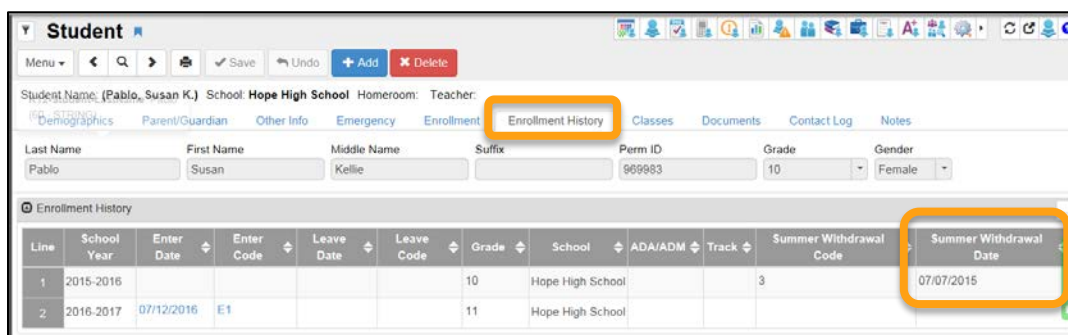
1. Locate the student record.
2. Click the **Menu** button and select **“No Show” Student** from the list of options. The **No Show Student** window displays.



3. Select a **Summer Withdrawal Code** from the drop-down.
4. Enter a **Summer Withdrawal Date**. This date must be before the first day of school, meaning the first day that is set up on the **School Calendar** screen.
5. Click the **No Show** button.



6. A message displays confirming the student was set as a No Show. Click **OK**.



Line	School Year	Enter Date	Enter Code	Leave Date	Leave Code	Grade	School	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2015-2016					10	Hope High School		3		
2	2016-2017	07/12/2016	E1			11	Hope High School				07/07/2015

NOTE: The student's record will still display in the system. Parentheses display around the name on the **Student** screen as an indicator that the student is no longer actively enrolled in this school.

7. The **Enrollment History** tab displays the **Summer Withdrawal Code** and **Date**.

Quick Reference Guide (QRG)

No Show a Student Quick Reference Guide (QRG) EN 04

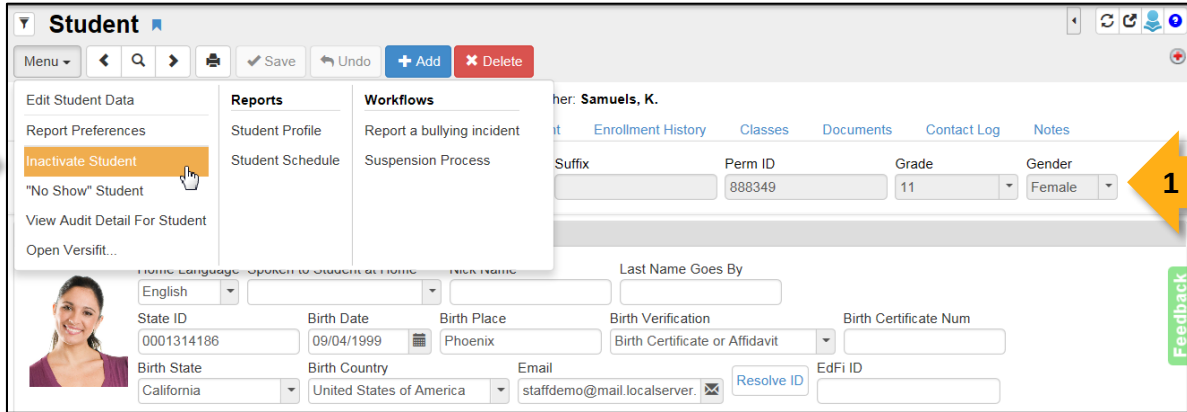
A **"No Show"** student is one who has enrolled at a school but who has never attended class for even a portion of one school day no matter when it is discovered, as long as it is same school year. A student once enrolled at your school who has never attended class, must be processed as a No Show student in Synergy SIS.

PATH Synergy SIS → Student → Student

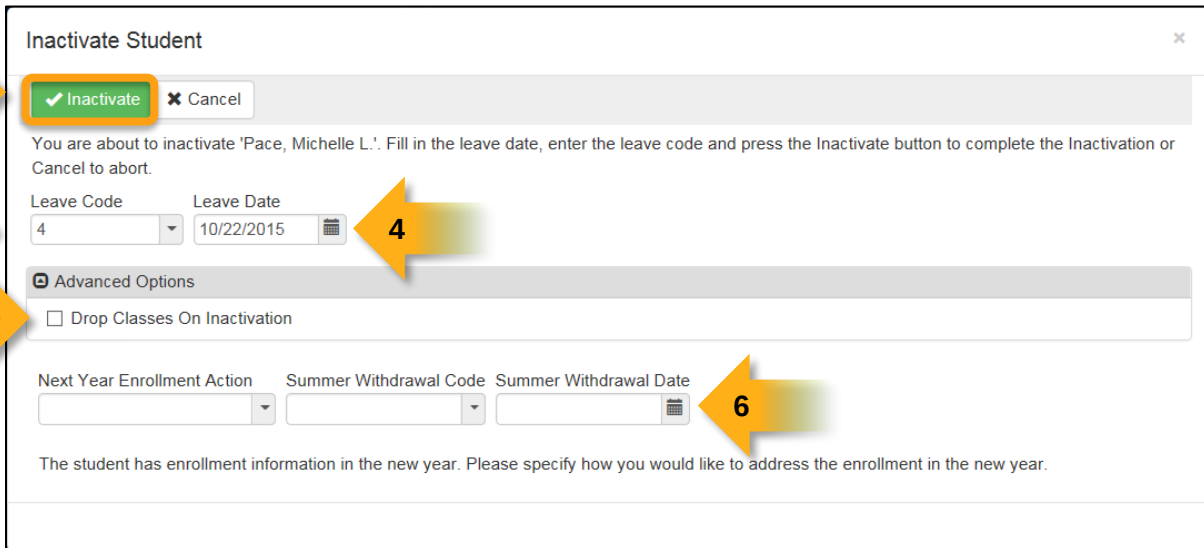
How to:	Steps:
No Show a student who has not attended class this school year.	- Find the student's record. - Click Menu. - Select No Show Student. No Show Student screen displays. - Enter Summer Withdrawal Code and Summer Withdrawal Date. - Select the Summer Withdrawal Reason Code, if used for your district. - Select whether or not to Preserve Student Classes on No Show. - Click No Show. <i>Student set to No Show</i> message box displays - Click OK to return to the Student screen.
Summer Dropouts	- Summer dropouts (no shows) are students who are in membership on last day of school last year but who do not return to school by the first day of the following school year for reasons other than transfer, death, or graduation. - All summer dropouts must be no showed and have a summer leave code and date entered.
Miscellaneous	- No show is used primarily during summer (in next year's database) up until the official start date of the new school year. - No showing after Official Start Day should only be done to correct an enrollment error; for special education IEP processing; or if it is determined that student never attended class – <i>regardless of when that discovery is made</i>. - Administrators should be notified of any student no showed after the official start day.

Inactivating a Student

To Inactivate (withdraw) a student go to the **Student** screen.



1. Locate the student record. **Note:** Only active students may be withdrawn.
2. Click the **Menu** button and select **Inactivate Student** from the list of options. The **Inactivate Student** window displays.



3. Select a **Leave Code** from the drop down menu.
4. Enter a **Leave Date**.
5. If **Drop Classes On Inactivation** is checked, a **Leave Date** is entered for all active sections on the **Classes** tab. The **Leave Date** entered is the same as the **Leave Date** entered for the withdrawal. Otherwise, the student will still show up on a teacher's Class Attendance records, but display as *Inactive* and the teacher will NOT be able to take attendance on them. **This option is recommended.**

6. Decide what **Next Year Enrollment** Action should be taken. The choices are **Delete Enrollment, Do Nothing, or No Show** (above)./
7. Click the **Inactivate** button (above).

NOTE: The student is inactivated and parentheses appear around their name on the **Student** screen. The leave information appears on the **Enrollment** Tab.

Quick Reference Guide (QRG)

Inactivating a Student

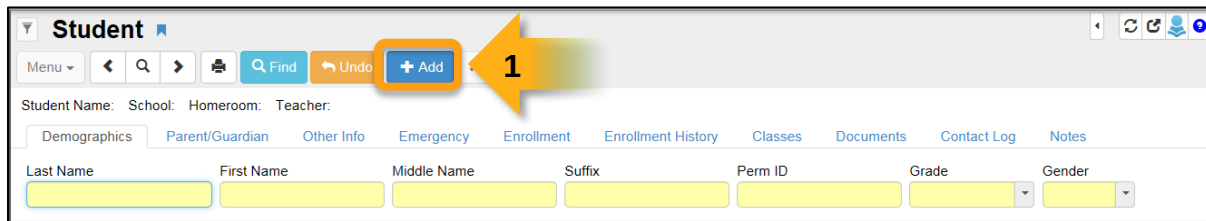
Quick Reference Guide (QRG) EN 05

PATH Synergy SIS → Student → Student

How to:	Steps:
Inactivate Student Who Has Attended Class This School Year	▪ Open Student screen. Find student to be inactivated using student name or ID. ▪ Find student to be inactivated using student name or ID. ▪ Click Menu. ▪ Select Inactivate Student. Inactivate Student screen opens in a separate window. ▪ Select the Leave Code, Withdrawal Reason Code if used and Enter Leave Date (MMDDYY) or click  and select the date. ▪ Select whether or not to Preserve Student Classes on Inactivation. ▪ In the current year, If New Year Rollover has been run and enrollment records exist for students in the New Year, Enter Next Year Enrollment Action, Next Grade, and Next School information for the student. ▪ (Option) Enter Summer Withdrawal Code and Summer Withdrawal Date if withdrawing them from the new school year. ▪ Click Inactivate. The student is now withdrawn and marked Inactive. Their name displays with parenthesis around it when focused to the school.

Transferring a Student

To transfer a student into your school from another school in your district go to the **Student** screen.



The screenshot shows the 'Student' screen in the Synergy Education Platform. At the top, there is a 'Student' header with a dropdown menu. Below the header, there are tabs for 'Demographics', 'Parent/Guardian', 'Other Info', 'Emergency', 'Enrollment', 'Enrollment History', 'Classes', 'Documents', 'Contact Log', and 'Notes'. The 'Enrollment' tab is selected. Below the tabs, there are input fields for 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'Grade', and 'Gender'. An orange arrow labeled '1' points to the '+ Add' button in the top right corner of the form.

1. Click the **Add** button (above). The **Student Find** window displays (below).
2. Enter partial or complete data on any **Search Criteria** field. It is important to try to enter data that is unique to that student, such as their **Birth Date**, or **Perm ID**, if possible. For instance, the last person who entered the student name may have entered it as Mac Donald, Ronald and the current user may enter it as MacDonald Ronnie. The correct record may be overlooked.
3. Click **Find**. The Students grid displays a list of records matching the search criteria.

Student Find

<< Previous

Next >>

Find

3

+ Add New

Search Criteria

Last Name

First Name

Middle Name

Birth Date

Perm ID

mills

Student Search

Students

Line	Status	Student Name	Gender	Birth Date	Perm ID	Current/Previous Enrollment				
						School	School Year	Grade	Leave Code	Leave Date
1		Mills, Andrew D.	Male	03/28/1999	904596	Hope High School	2015-2016	11		
2		Mills, Diane D.	Female	09/05/2003	946702	Eisenhower Middle School	2015-2016	07		
3		Mills, Irene M.	Female	05/28/2009	137360	Washington Elementary	2015-2016	01		
4		Mills, Jack L.	Male	12/12/1997	874089	Kennedy High School	2015-2016	12		
5	I	Mills, Joan W.	Female	04/27/2004	118796	Grant Elementary	2015-2016	06	W1	07/14/2015
6		Mills, Joe B.	Male	04/26/2000	903501	King High School	2015-2016	10		
7		Mills, Julia N.	Female	01/22/2006	994502	Jefferson Elementary	2015-2016	04		
8		Mills, Katherine G.	Female	07/21/2010	167787	Washington Elementary	2015-2016	K		
9		Mills, Patricia K.	Female	05/07/2002	933323	Truman Middle School	2015-2016	08		

The grid rows in the **Students** search grid are color-coded as follows:

White background – The student is actively enrolled in the focus year. Unless concurrent enrollment is allowed at the school, these students cannot be transferred until they are withdrawn from their current school.

Yellow background – The student is not actively enrolled in the focus year.

Light Blue background – The student's most recent enrollment is not in the focus year.

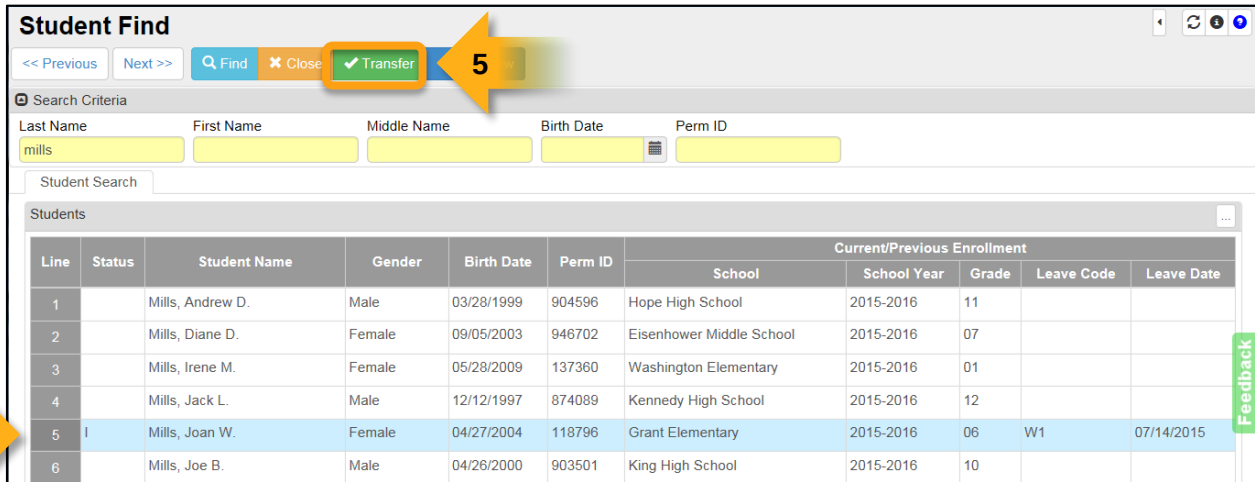
Grey background – The student has a restriction on record that may restrict their enrollment in certain schools.

The Status codes in the **Student** search grid are as follows:

I – Students that withdraw from school before the end of the school year are listed with an I in the Status column.

W – Students that did not re-enroll in the next school year are listed with a W in the Status column.

ENR – Students with ENR in the Status column have an enrollment restriction.



Student Find

<< Previous Next >> Find Close **Transfer**

Search Criteria

Last Name First Name Middle Name Birth Date Perm ID

mills

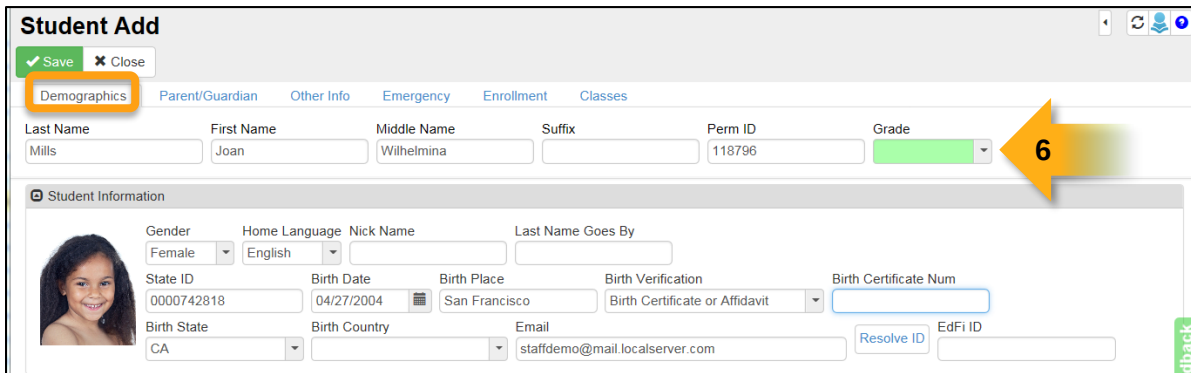
Student Search

Students

Line	Status	Student Name	Gender	Birth Date	Perm ID	Current/Previous Enrollment				
						School	School Year	Grade	Leave Code	Leave Date
1		Mills, Andrew D.	Male	03/28/1999	904596	Hope High School	2015-2016	11		
2		Mills, Diane D.	Female	09/05/2003	946702	Eisenhower Middle School	2015-2016	07		
3		Mills, Irene M.	Female	05/28/2009	137360	Washington Elementary	2015-2016	01		
4		Mills, Jack L.	Male	12/12/1997	874089	Kennedy High School	2015-2016	12		
5	I	Mills, Joan W.	Female	04/27/2004	118796	Grant Elementary	2015-2016	06	W1	07/14/2015
6		Mills, Joe B.	Male	04/26/2000	903501	King High School	2015-2016	10		

4. Locate the correct student record and click on the line number to highlight. **Note:** An inactive student is highlighted in yellow and an 'I' appears in the Status column. **If the student still shows as being active, the other school needs to inactivate the student first.**

5. Click the **Transfer** button.



Student Add

Save Close

Demographics Parent/Guardian Other Info Emergency Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade

Mills Joan Wilhelmina 118796

Student Information

Gender Home Language Nick Name Last Name Goes By

Female English

State ID Birth Date Birth Place Birth Verification Birth Certificate Num

0000742818 04/27/2004 San Francisco Birth Certificate or Affidavit

Birth State Birth Country Email

CA staffdemo@mail.localserver.com

Resolve ID EdFi ID

The **Student Add** screen opens with the student's information that will need to be verified on the different tabs.

6. On the **Demographics** tab select the **Grade** from the dropdown.

7

School of Residence Reason for Attendance Reason for Attendance Date

7. Also on the **Demographics tab**, if the student is being transferred to a school that is not the original **School of Residence**, you need to select a **Reason for Attendance** from the drop-down and enter the date the student will first start at the new school in the **Reason for Attendance Date** field.

8

Student Add

Save Close

Demographics Parent/Guardian Other Info Emergency Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade

Mills Joan Wilhelmina 118796

Parents and Guardians

Line	Order	Lives With	Relation	First Name	Middle Name	Last Name	Gender	BirthDate	Address
1		☒	Father	Donald		Mills			1960 W Keating Av #519 Mesa
2		☒	Mother	Frances		Thomas			1960 W Keating Av #519 Mesa

8. On the Parent/Guardian tab verify all parent information (above).

9

Student Add

Save Close

Demographics Parent/Guardian Other Info Emergency Enrollment Classes

Last Name First Name Middle Name Suffix Perm ID Grade

Mills Joan Wilhelmina 118796

Other Information

Enrollment Restriction Enrollment Restriction Date Custody

Expected Graduation Year Final Withdrawal Date Immigration Date

2014 06/23/2015

Psych Records Special Ed Screening Date Family Code Dwelling Type Internet Authorization

07/26/2012 Two adult family Apartment

Us Citizen Chronic Illness Excessive Debt Indicator

Directory List Exclude Migrant General Equivalency Diploma

Teen Parent

Has Internet At Home Counselor Name ELL Date

10

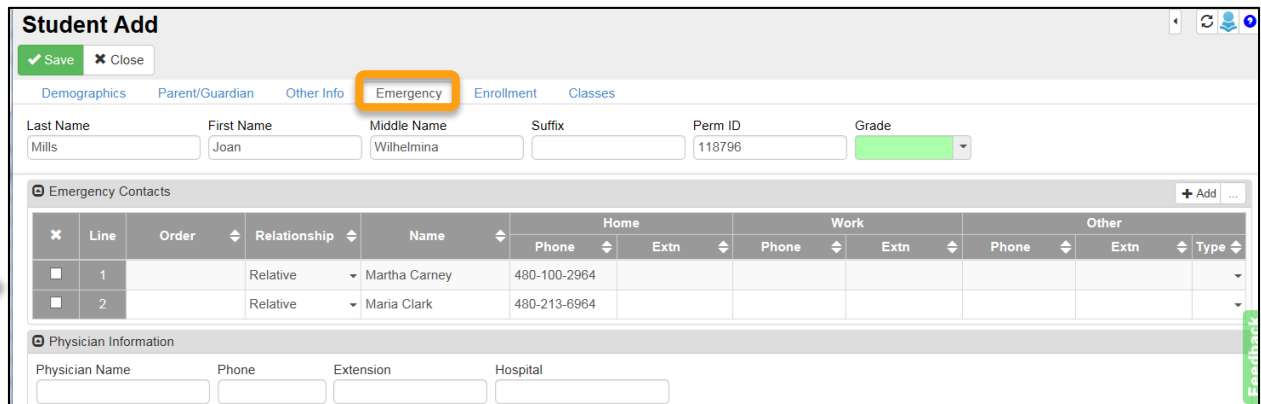
Next Year

New Year Action Next Grade Level Next School Next Enter Code

Schools

9. On the **Other Info tab**, complete any required fields such as **New Year Action** and photo and internet authorizations.

10. If you know the student's assigned **Counselor**, click the  icon to find and select the **Counselor**.



Student Add

✓ Save ✕ Close

Demographics Parent/Guardian Other Info **Emergency** Enrollment Classes

Last Name: Mills First Name: Joan Middle Name: Wilhelmina Suffix: Perm ID: 118796 Grade:

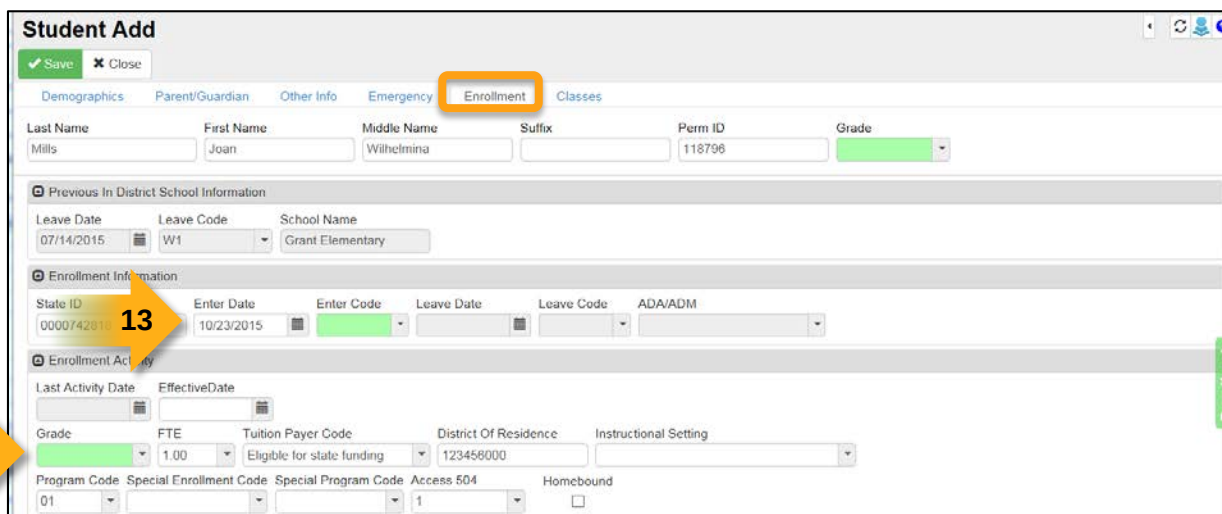
Emergency Contacts

Line	Order	Relationship	Name	Home Phone	Home Extn	Work Phone	Work Extn	Other Phone	Other Extn	Type
1		Relative	Martha Carney	480-100-2964						
2		Relative	Maria Clark	480-213-6964						

Physician Information

Physician Name: Phone: Extension: Hospital:

11. On the **Emergency** tab, verify all the information is correct.



Student Add

✓ Save ✕ Close

Demographics Parent/Guardian Other Info Emergency **Enrollment** Classes

Last Name: Mills First Name: Joan Middle Name: Wilhelmina Suffix: Perm ID: 118796 Grade:

Previous In District School Information

Leave Date: 07/14/2015 Leave Code: W1 School Name: Grant Elementary

Enrollment Information

State ID: 0000742015 Enter Date: 10/23/2015 Enter Code: ADA/ADM

Enrollment Activity

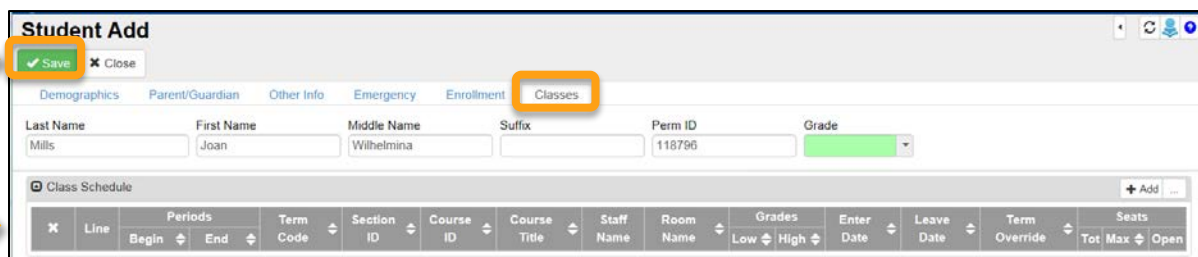
Last Activity Date: Effective Date:

Grade: FTE: 1.00 Tuition Payer Code: Eligible for state funding: District Of Residence: 123456000 Instructional Setting:

Program Code: 01 Special Enrollment Code: Special Program Code: Access 504: Homebound:

12. Click on the **Enrollment** tab and enter the details of the new enrollment. If the student is transferring across school years, the **Grade** level is blank and must be selected.

13. Enter the **Enter Date** and select the **Enter Code** from the drop down menu.



Student Add

✓ Save ✕ Close

Demographics Parent/Guardian Other Info Emergency Enrollment **Classes**

Last Name: Mills First Name: Joan Middle Name: Wilhelmina Suffix: Perm ID: 118796 Grade:

Class Schedule

Line	Periods	Term	Section	Course	Course	Staff	Room	Grades	Enter	Leave	Term	Seats
	Begin	End	ID	ID	Title	Name	Name	Low	Date	Date	Override	Tot Max
								High				Open

14. Click on the **Classes** tab to add the student's classes.

15. Click **Save** at the top of the screen to complete the transfer.

Quick Reference Guide (QRG)

Transfer a Student or Re-enroll a No-Show Student

Quick Reference Guide (QRG) EN 02

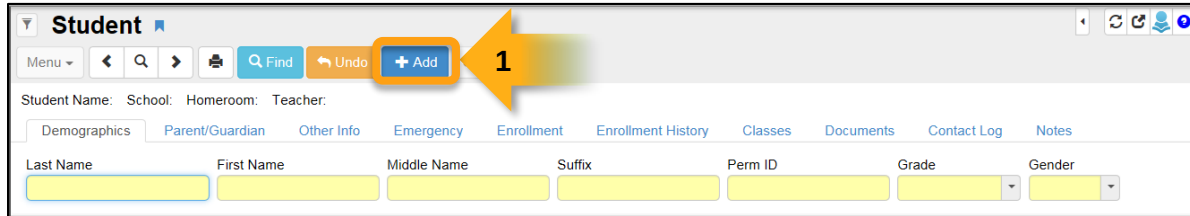
PATH Synergy SIS → Student → Student

How to:	Steps:
Complete a Student Transfer	- Click Add – Student Find window displays. - TRY TO ENTER DATA THAT IS UNIQUE TO THAT STUDENT, SUCH AS THEIR BIRTH DATE, OR PERM ID in the Student Find screen. - Click Find. A list of students that match criteria entered displays. - To select the student, click Line Number of student to be transferred.
NOTE: If a student's name has a current school year enrollment, in order to transfer student to your school you must contact register at student's former school and request to inactivate student from their enrollment.	
	Click Transfer. The Student Add Screen opens in a new window.
Verify/Enter Demographic, Parent/Guardian, Other Info, and Emergency Information	- Update the information as needed on the Demographics, Parent/Guardian, Other Info, and Emergency Tabs. If additional information is available to you not already listed, enter it at this time. - Each student MUST have at least one (1) parent/guardian record entered at time of enrollment. - Emergency Contacts - Click Add on Emergency Contacts bar to input name, relationship, and phone number(s) of someone other than parent to contact in an emergency. - Select Language from drop-down. - Check Release To if student can be released to this Emergency Contact - Contact Order - This will populate after the Student record has saved.
NOTE: Some districts may have policies having to do with "Base School", "Reason for Attendance", or "Placement Code and Placement Date." Refer to your District Policy.	
Add Existing Parent/Guardian Record To New Student	- Click Find Parent. The Parent Find screen opens. - Enter search criteria in any white field. Click search. - Locate the parent and select Add Parent in the row containing that person's name (You can select more than one parent). - Click Add Parents.

	▪ Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.. ▪ Click Save.
Add New Parent/Guardian Record To New Student	▪ Click Find Parent. If a parent does not exist with same address as student, Synergy SIS displays Parent Find window where a search can be performed on parent last name. ▪ Type parent Last Name. ▪ Click Search to the right. Notice last name entered could be contained anywhere in actual last name. If "Smith" is typed into Last Name field, program displays all names that contain word "Smith" such as Carr-Smith, Desmith or Silversmith and actual name "Smith" displays alphabetically on list after these names. ▪ If parent displays on list, check Add Parent next to name. ▪ Click Add Parents. Parent/Guardian tab displays with parent ▪ Select appropriate entry for Lives With, Contact Allowed, Ed. Rights, Has Custody, and/or Mailings Allowed. ▪ If parent name does not display on list, click red "X" in upper right hand corner to close window ▪ Click Add on Parents and Guardians grid. ▪ Type Order for which this parent/guardian displays on list. ▪ Check Lives With if student Lives With this parent/guardian. ▪ Select Relation from drop-down. ▪ Enter parent/guardian First Name, Middle Name (optional), Last Name ▪ Select Education Level from drop-down, if applicable. ▪ Select appropriate Contact Allowed, Ed Rights, Has Custody, Mailings Allowed, Enrolling Parent, Release To, and/or Financial Resp.
Enter Enrollment information	▪ Select Enter Date if different from current date. ▪ Select appropriate Enter Code from drop-down. ▪ Enter all other information specified into appropriate fields in Enrollment Activity group box and Other Enrollment Information group box. ▪ Click Save.
Note: After enrollment is saved, a student's schedule can be entered on the Classes Tab. Use the Chooser to select the classes; modify the Enter Date if needed. Click Save.	
Maintaining Student Data after student enrollment	▪ Review the field types used on the Student screen and decide how your District Policy will dictate their use.

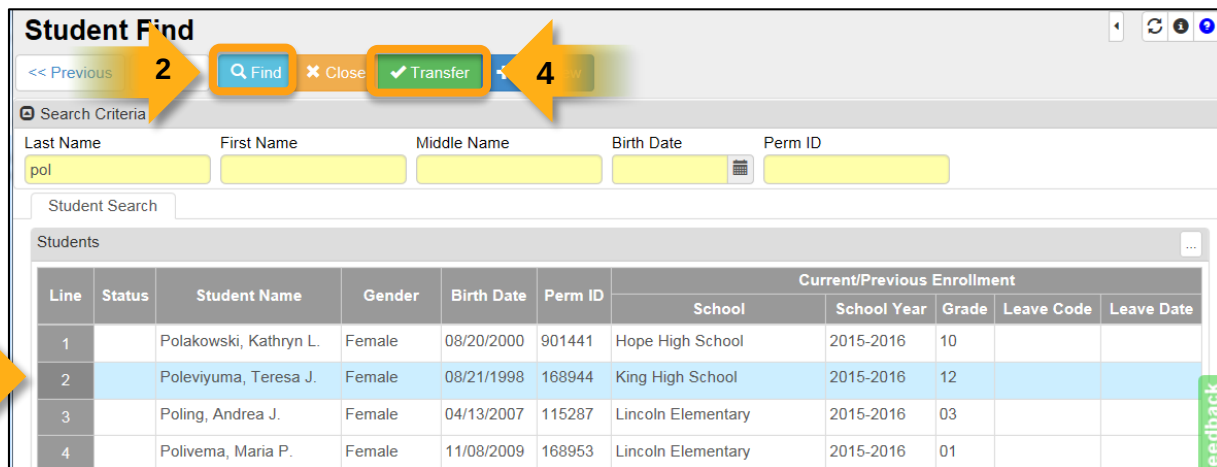
Concurrently Enrolling a Student

To concurrently enroll students in more than one school in your district go to the **Student** screen. Click the **Add** button.



The screenshot shows the 'Student' screen with a top navigation bar. The 'Add' button is highlighted with an orange arrow labeled '1'. Below the navigation bar, there are tabs for Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, Documents, Contact Log, and Notes. The main form area contains fields for Last Name, First Name, Middle Name, Suffix, Perm ID, Grade, and Gender.

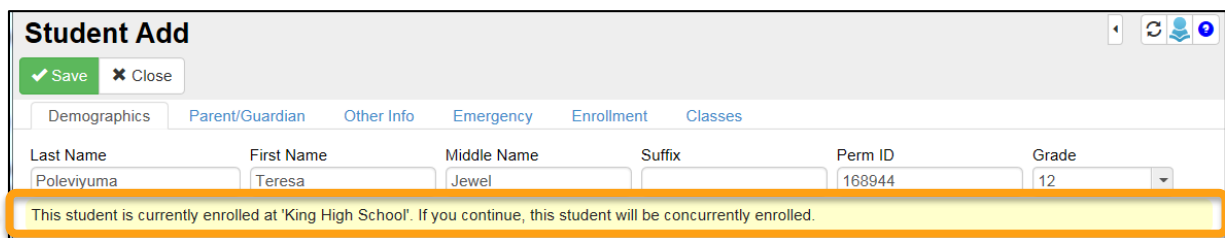
1. Click the **Add** button (above). The **Student Find** window displays.



The screenshot shows the 'Student Find' window. At the top, there are buttons for '<< Previous', 'Find', 'Close', 'Transfer', and '>> Next'. Below these are search criteria fields for Last Name, First Name, Middle Name, Birth Date, and Perm ID. A table titled 'Students' lists four students. The second student, 'Poleviyuma, Teresa J.', is highlighted with a blue background. An orange arrow labeled '3' points to this record. Another orange arrow labeled '4' points to the 'Transfer' button. A third orange arrow labeled '2' points to the 'Find' button.

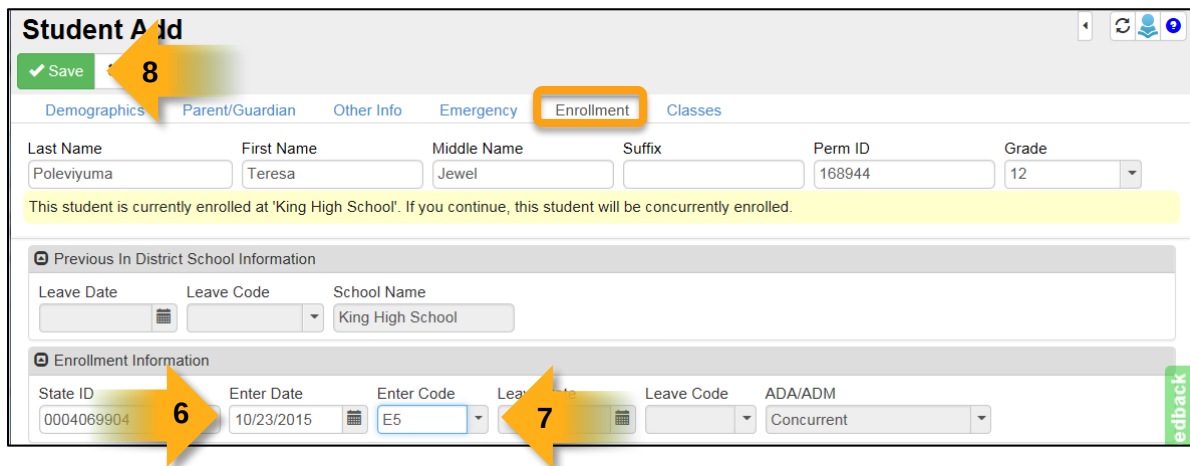
Line	Status	Student Name	Gender	Birth Date	Perm ID	Current/Previous Enrollment				
						School	School Year	Grade	Leave Code	Leave Date
1		Polakowski, Kathryn L.	Female	08/20/2000	901441	Hope High School	2015-2016	10		
2		Poleviyuma, Teresa J.	Female	08/21/1998	168944	King High School	2015-2016	12		
3		Poling, Andrea J.	Female	04/13/2007	115287	Lincoln Elementary	2015-2016	03		
4		Polivema, Maria P.	Female	11/08/2009	168953	Lincoln Elementary	2015-2016	01		

2. Enter search information in the Search Criteria group box and click **Find**.
3. Once you have located the correct student record, highlight the record.
4. Click the **Transfer** button.



The screenshot shows the 'Student Add' screen. At the top, there are buttons for 'Save' and 'Close'. Below these are tabs for Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, and Classes. The main form area contains fields for Last Name, First Name, Middle Name, Suffix, Perm ID, and Grade. A warning message is displayed at the bottom: 'This student is currently enrolled at 'King High School'. If you continue, this student will be concurrently enrolled.'

5. The Student Add screen displays with a warning about concurrent enrollment: **"This student is currently enrolled at 'King High School'. If you continue, this student will be concurrently enrolled."**



Student Add

✓ Save

Demographics Parent/Guardian Other Info Emergency **Enrollment** Classes

Last Name: Poleviyuma First Name: Teresa Middle Name: Jewel Suffix: Perm ID: 168944 Grade: 12

This student is currently enrolled at 'King High School'. If you continue, this student will be concurrently enrolled.

Previous In District School Information

Leave Date: School Name: King High School

Enrollment Information

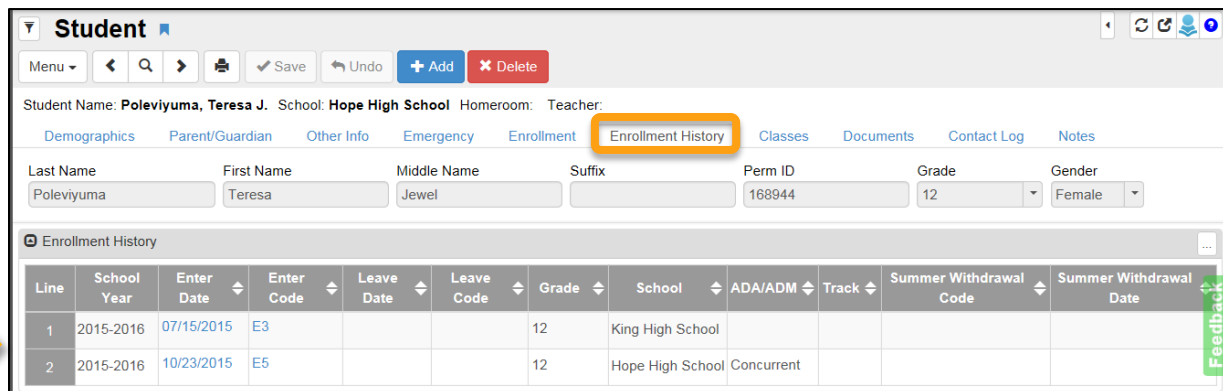
State ID: 0004069904 Enter Date: 10/23/2015 Enter Code: E5 Leave Date: Leave Code: ADA/ADM: Concurrent

edback

6. On the **Enrollment** tab, enter the **Enter Date** for when the student will start attending both schools concurrently.
7. Select the **Enter Code** from the dropdown. Most districts will have a *Concurrent Enrollment* code as an option.

NOTE: All the rest of the information on the student's record is stored at the primary or home school, so there is no need to verify information on the other tabs.

8. Click **Save**.



Student

Menu < > Save Undo + Add x Delete

Student Name: Poleviyuma, Teresa J. School: Hope High School Homeroom: Teacher:

Demographics Parent/Guardian Other Info Emergency Enrollment **Enrollment History** Classes Documents Contact Log Notes

Last Name: Poleviyuma First Name: Teresa Middle Name: Jewel Suffix: Perm ID: 168944 Grade: 12 Gender: Female

Enrollment History

Line	School Year	Enter Date	Enter Code	Leave Date	Leave Code	Grade	School	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2015-2016	07/15/2015	E3			12	King High School				
2	2015-2016	10/23/2015	E5			12	Hope High School	Concurrent			

Feedback

9. The student is now concurrently enrolled at both King High School and Hope High School as indicated on the **Enrollment History** tab.

Quick Reference Guide (QRG)

Concurrent Students

Quick Reference Guide (QRG) EN 03

Concurrent students are students enrolled in two or more schools in the district at the same time. One example would be a student who is enrolled at their home school part of the day and a district vocational school part of the day. Check concurrent students to be sure they are truly concurrent and do not have a full schedule at your school.

PATH Synergy SIS → Student → Student

How to:	Steps:
Add Concurrent Students	- Click Add. - Enter Student Information. - Click Find or press ENTER key. A list of students that meet criteria entered displays. - Click Line Number of student to be added concurrently student is highlighted. - Click Transfer – Student Add screen displays.
Demographics Tab	Verify mandatory fields: (green) Student's legal name, grade, gender, ethnic code, birth date, and home address.
Other Info Tab	- If New Year Rollover has been performed, fill in "New Year Action" and Next Grade and Next School. - Select any Secondary Ethnicities that apply.
Enrollment Tab	- Enter date MUST be one (1) school date later than the Home school's enter date. - Click Save.
NOTE: Concurrent students are identified as Concurrent in ADA/ADM field. Do not change.	
Withdrawing concurrent students MUST be inactivated in Student screen	- Click Menu at top of screen. - Select Inactivate Student. - Select appropriate W code (matching the Home school) from drop-down list. - Click Save.

Generating Student Enrollment Reports

There are four types of reports available:

- **Individual Reports** print out information about a single student per page, but may be printed for multiple students at one time.
- **List Reports** generate summaries for multiple students.
- **Summary Reports** present numerical report summaries
- **Labels Reports** are Mailing Labels or Household Labels that may be printed by Student, Grade, Group, or Class. .

Path: Synergy SIS > Student > Reports

Individual Reports

STU201 – Student Profile prints a student profile that includes custodial information, health conditions, emergency and doctor information. You can select a student by perm ID, last name and first name or groups of student by grade. You can also leave all options blank and print the report for all students in the school. This report is utilized by school staff to file the student information in the student's permanent file. The report is also sent home at the beginning of the school year to verify student record information contained at the school.

STU203, STU206, STU801 – Withdrawal Slips these are several examples of Withdrawal Slips that can be used in the system. Your district will instruct you on which ones to use in your school.

Labels Reports

STU802 – Student Mailing Labels prints mailing labels for each student. You can select students by Grade, Gender, Student Group, Homeroom section or all scheduled sections, a specific section, period or teacher. You can also leave all options blank and print the report for all students in the school. This report is utilized by school staff to create labels for mailing information to students and parents.

List Reports

STU402 - Student And Parent Directory prints a list of students for each section. You can select students by grade, gender, section id, homeroom name, term, period, or parent relations flag. You can also leave all options blank and print the report for all students in the school by class. The report includes by section, student name, perm id, grade, gender, birth date, phone, address, relation, parent name, type, phone and extension. This report is utilized by school staff and teachers for students and parents contact information.

STU404 – Student Birthday List prints a list of students sorted by birth month then date. You must select a birth month to print. You can also select students to print by grade, gender or section if. The report includes by month then day, student name, grade, gender, age, homeroom, address, city, state, and zip code. The report is sorted by section id then birth date, student name and gender. This report is utilized by school staff and teachers to send out birthday greetings to students at the school.

STU410 – Emergency Contact Directory prints a list of students for each section. You can select students by Grade, Gender, Section ID, Room Name, or Parent Relations flag. You can also leave all options blank and print the report for all students in the school. The report includes by section, student name, perm id, grade, gender, birth date, phone, address, relation, parent information, emergency contact information, phone type, phone and extension. This report is utilized by school staff and teachers for students and parents contact information in case of emergency.

Summary Reports

STU601 – Active Student Totals prints a summary of totals by grade and gender for active, inactive and total students. You must select an as of date for the report. This report is utilized by school administrative staff to monitor the student numbers in their school.

TCH601 – Student Enrollment by Teacher prints a summary of totals by teacher, grade and gender for students. You must select an as of date and as least one grade for the report. This report is utilized by school administrative staff to monitor the student numbers in each teacher's class for their school.

Self-Assessment Checklist

When attendees complete Enrollment training they will be able to:

- Add a new student by
 - ☐ Using the Add button
 - ☐ Performing a search for Students in the District
 - ☐ Completing all tabs and fields required
- Inactivate or No Show an existing student by
 - ☐ Using the Menu option
- Transfer a student in the district
 - ☐ Locate and identify students previous school enrollment
 - ☐ Contact school to have student inactivated (if necessary)
 - ☐ Transfer and complete enrollment information for student
- Concurrently Enroll a Student
 - ☐ Locate and identify students current school enrollment
 - ☐ Transfer and complete concurrent enrollment information for student
- Edit a Student Record by
 - ☐ Changing details on a specific student record
 - ☐ Entering additional information on a student record
 - ☐ Changing enrollment record information
- Viewing Student Reports
 - ☐ Print STU201 Student Profile
 - ☐ Print STU402 Student and Parent Directory
 - ☐ Print STU601 Student Totals