



Synergy[®] ***SIS***

Student Conference Training Module



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Course Description

In this training course, you will learn how to view and record student conference information.

Expected Outcomes

After completing this course participants will be able to:

- Set up Conference Visitation Codes
- View Student Conference Details
- Add a Student Conference Event
- View Student Conference History
- Generate Student Conference Reports

Course Prerequisites

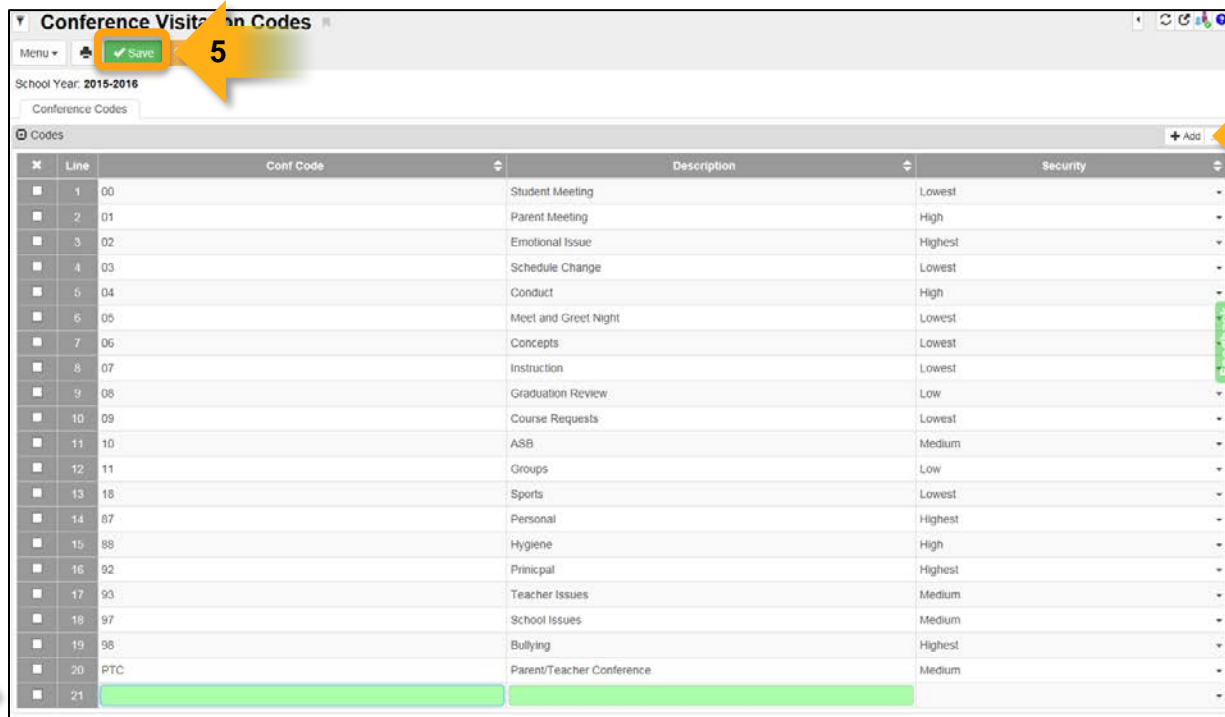
Participants should have the following:

- Log-in Credentials
- Understanding of basic Synergy navigation
- Synergy Update or View security rights

Setting Up Conference Codes

There are many different types of conferences that may be held regarding a student. Each school is responsible for setting up their own conference type codes using the **Conference Visitation Codes** screen. These codes must be created in order to use the **Student Conference** screen to record conference occurrences.

Go to **Synergy SIS > Student > Setup > Conference Visitation Codes**



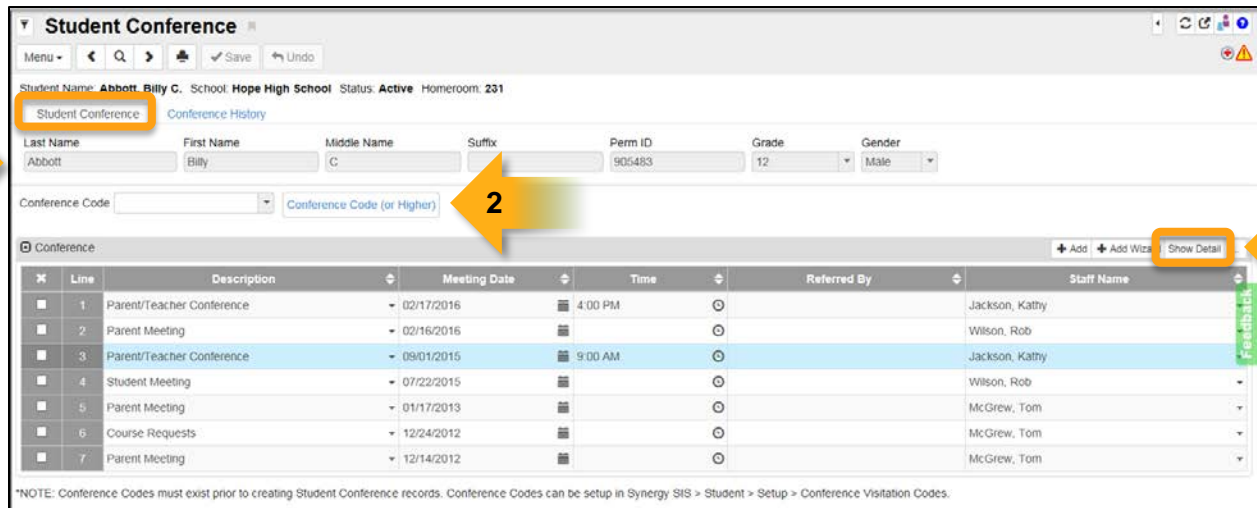
Line	Conf Code	Description	Security
1	00	Student Meeting	Lowest
2	01	Parent Meeting	High
3	02	Emotional Issue	Highest
4	03	Schedule Change	Lowest
5	04	Conduct	High
6	05	Meet and Greet Night	Lowest
7	06	Concepts	Lowest
8	07	Instruction	Lowest
9	08	Graduation Review	Low
10	09	Course Requests	Lowest
11	10	ASB	Medium
12	11	Groups	Low
13	18	Sports	Lowest
14	87	Personal	Highest
15	88	Hygiene	High
16	92	Principal	Highest
17	93	Teacher Issues	Medium
18	97	School Issues	Medium
19	98	Bullying	Highest
20	PTC	Parent/Teacher Conference	Medium
21			

1. To create a new code, click the **Add** button.
2. A blank line is added to the bottom of the codes grid. Type in a **Conference Code**. It can be either *alpha* or *numeric*.
3. Type out a short **Description**.
4. Assign a security level. If there are certain staff members who are assigned a level of security through the **User** screen, they will only have access to **Conference Types** that match that security level. For example, conferences of a personal or confidential nature should only be seen by staff with the *Highest* security level. Users with the *Lowest* or *No* security levels will not have access to all recorded conferences. **Note:** If security levels are not being used in the **User** screen, all users have access to all conferences.
5. Click **Save**.

Managing Student Conferences

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

Viewing Student Conference Details



Student Conference

Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Homeroom: **231**

Student Conference | Conference History

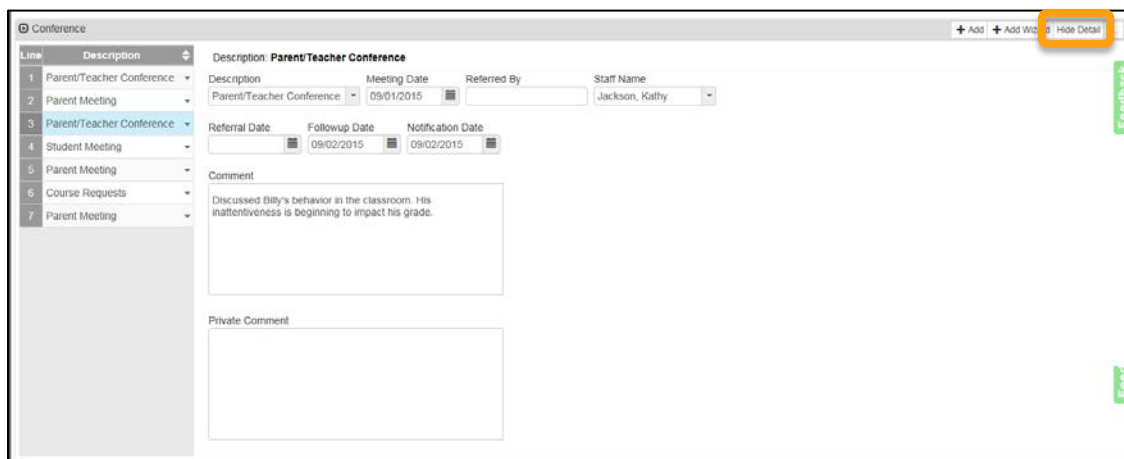
Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Suffix: Perm ID: **905483** Grade: **12** Gender: **Male**

Conference Code: **Conference Code (or Higher)**

Line	Description	Meeting Date	Time	Referred By	Staff Name
1	Parent/Teacher Conference	02/17/2016	4:00 PM		Jackson, Kathy
2	Parent Meeting	02/16/2016			Wilson, Rob
3	Parent/Teacher Conference	09/01/2015	9:00 AM		Jackson, Kathy
4	Student Meeting	07/22/2015			Wilson, Rob
5	Parent Meeting	01/17/2013			McGrew, Tom
6	Course Requests	12/24/2012			McGrew, Tom
7	Parent Meeting	12/14/2012			McGrew, Tom

*NOTE: Conference Codes must exist prior to creating Student Conference records. Conference Codes can be setup in Synergy SIS > Student > Setup > Conference Visitation Codes.

1. On the **Student Conference** tab, find the student record to view.
2. You may filter the view in the grid by the type of conference. Select a code from the **Conference Code** drop-down menu and click the **Conference Code** button. **Note:** You will only see the conference codes that are included in your security level, if security levels are being used.
3. In the **Conference** grid, each record represents a specific occurrence of a conference visitation. To view more details, highlight the line number and click the **Show Detail** button. The details display (below).
4. Click the **Hide Detail** button to return to the grid, or click another line to view details of another occurrence.



Conference

Line: **3** Description: **Parent/Teacher Conference**

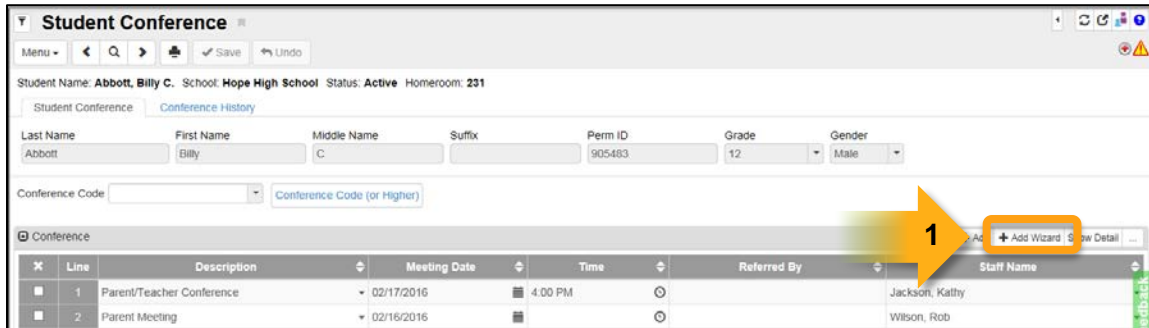
Description: **Parent/Teacher Conference** Meeting Date: **09/01/2015** Referred By: Staff Name: **Jackson, Kathy**

Referral Date: Followup Date: **09/02/2015** Notification Date: **09/02/2015**

Comment: **Discussed Billy's behavior in the classroom. His inattentiveness is beginning to impact his grade.**

Private Comment:

Adding a Student Conference Event



Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Homeroom: **231**

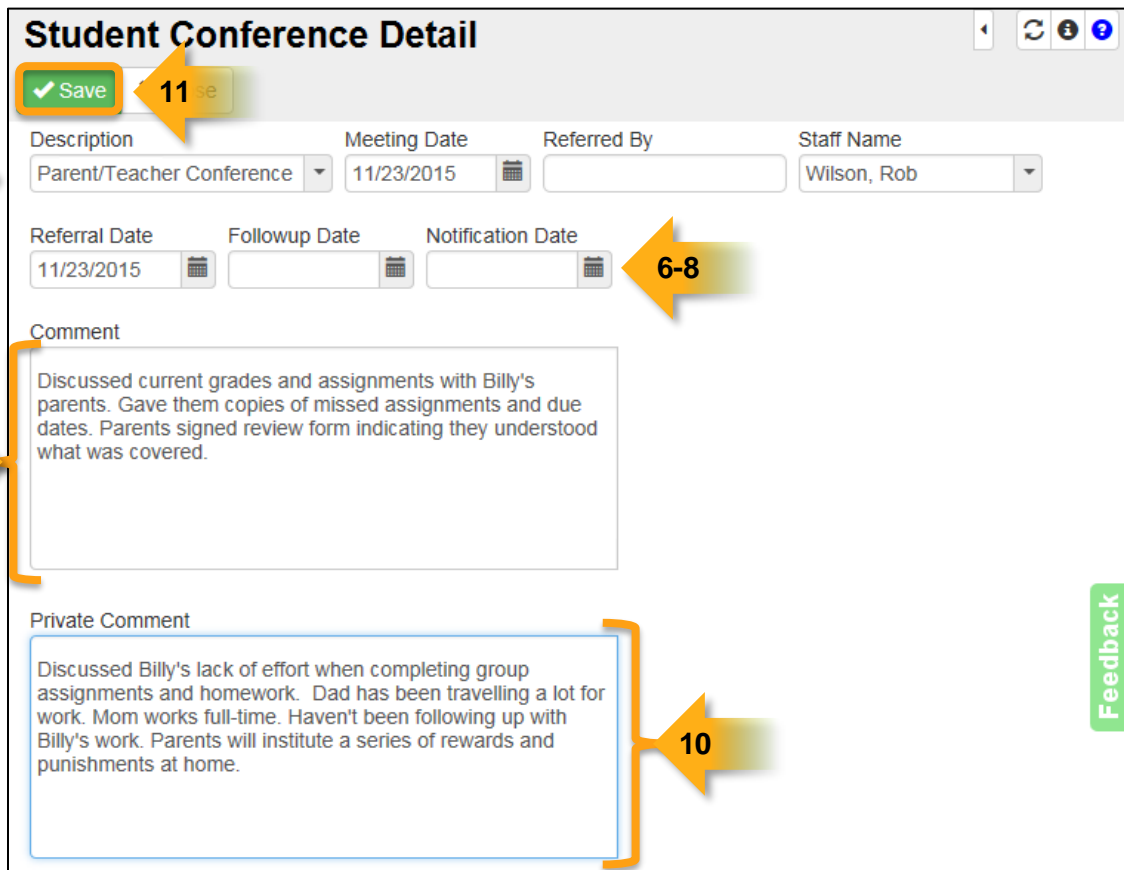
Student Conference | Conference History

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

Conference Code: Conference Code (or Higher):

Line	Description	Meeting Date	Time	Referred By	Staff Name
1	Parent/Teacher Conference	02/17/2016	4:00 PM		Jackson, Kathy
2	Parent Meeting	02/16/2016			Wilson, Rob

1. On the **Conference** grid, click the **Add Wizard** button (above).



Student Conference Detail

Save **11**

Description: **Parent/Teacher Conference** Meeting Date: **11/23/2015** Referred By: Staff Name: **Wilson, Rob**

Referral Date: **11/23/2015** Followup Date: Notification Date: **6-8**

Comment **9**

Discussed current grades and assignments with Billy's parents. Gave them copies of missed assignments and due dates. Parents signed review form indicating they understood what was covered.

Private Comment **10**

Discussed Billy's lack of effort when completing group assignments and homework. Dad has been travelling a lot for work. Mom works full-time. Haven't been following up with Billy's work. Parents will institute a series of rewards and punishments at home.

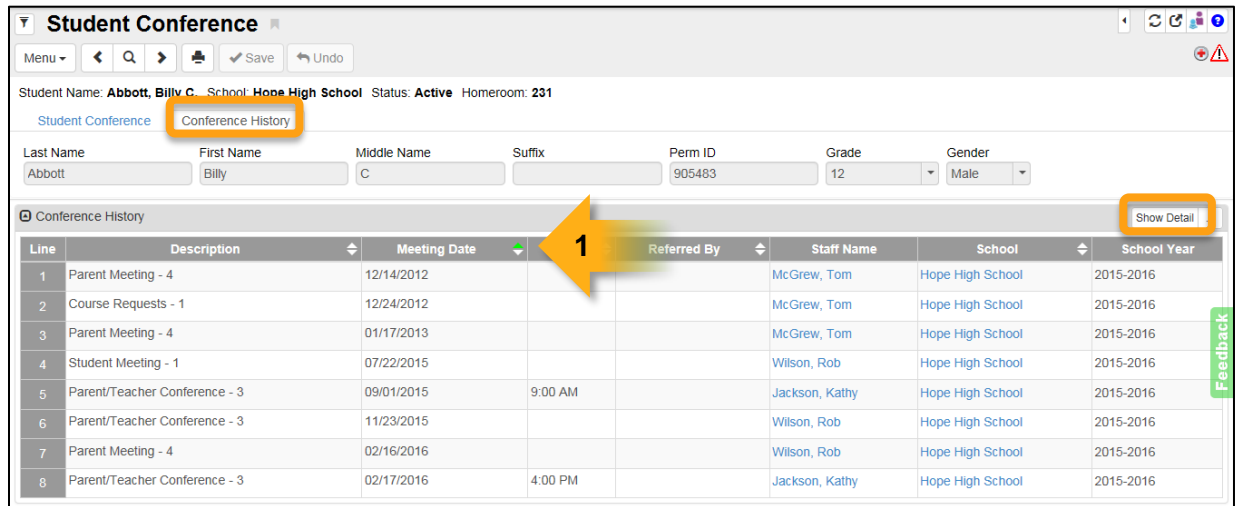
Feedback

2. In the **Student Conference Detail** window, select the type of conference from the **Description** drop down menu.
3. Change the **Meeting Date**, if needed, to the correct date.

4. In the **Referred By** field, enter the referrer's name. **Note:** Conferences that need to take place as a result of a disciplinary issue should be scheduled and recorded on the **Discipline Incident** screens.
5. Select the **Staff Name** of the person recording this event. Only the staff members given user access through the **Staff** screen will be listed here.
6. Enter the **Referral Date**.
7. Enter the **Follow up Date**. Office staff who use the Dashboard on the Synergy **Home** screen may receive follow-up notifications if this date is entered.
8. If the parents or guardians are notified of the student conference, enter the **Notification Date**.
9. In the **Comment** field enter details about what was covered during the conference meeting. **Note:** All information entered in the **Comment** field will be visible on a printed report and may be subpoenaed by a court of law.
10. If you want to enter details that will not display on a printed report, enter them in the **Private Comment** field. **Note:** Any staff member that has access to this student conference record in Synergy will be able to see the contents of the **Private Comment** field. **Note:** All information entered in the **Private Comment** field may be subpoenaed by a court of law.
11. Click the **Save** button.

Viewing Conference History

The **Conference History** tab displays all of the conferences the student has had in the past, including during the current school year and any other school year in which they have been enrolled in your school. **Note:** Your district may restrict the display to show only current school year conferences.



Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Homeroom: **231**

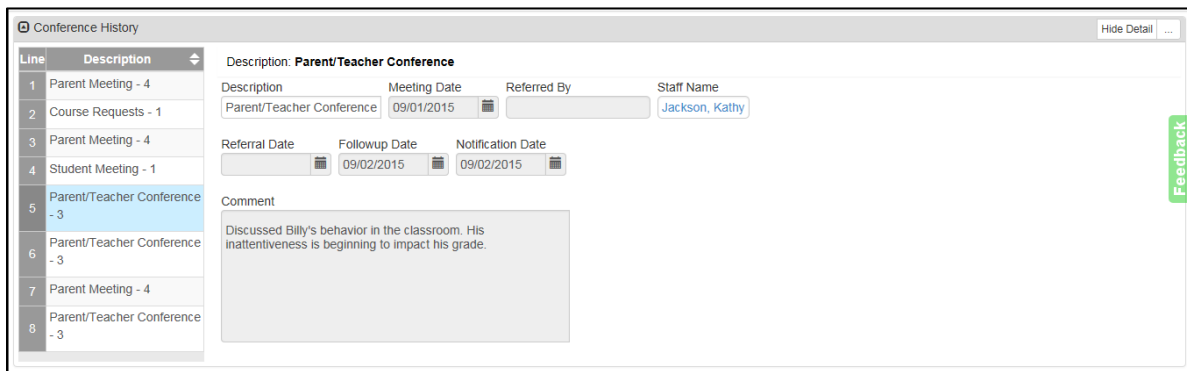
Student Conference | **Conference History**

Last Name: First Name: Middle Name: Suffix: Perm ID: Grade: Gender:

Line	Description	Meeting Date	Referred By	Staff Name	School	School Year
1	Parent Meeting - 4	12/14/2012		McGrew, Tom	Hope High School	2015-2016
2	Course Requests - 1	12/24/2012		McGrew, Tom	Hope High School	2015-2016
3	Parent Meeting - 4	01/17/2013		McGrew, Tom	Hope High School	2015-2016
4	Student Meeting - 1	07/22/2015		Wilson, Rob	Hope High School	2015-2016
5	Parent/Teacher Conference - 3	09/01/2015	9:00 AM	Jackson, Kathy	Hope High School	2015-2016
6	Parent/Teacher Conference - 3	11/23/2015		Wilson, Rob	Hope High School	2015-2016
7	Parent Meeting - 4	02/16/2016		Wilson, Rob	Hope High School	2015-2016
8	Parent/Teacher Conference - 3	02/17/2016	4:00 PM	Jackson, Kathy	Hope High School	2015-2016

Show Detail

1. You may change the display order of records by clicking the arrows at the top of a column.
2. To view the details of the student conference, highlight the line number and click the **Show Detail** button. This is a view-only screen.



Conference History | Hide Detail

Line	Description	Description	Meeting Date	Referred By	Staff Name
1	Parent Meeting - 4	Parent/Teacher Conference	09/01/2015		Jackson, Kathy
2	Course Requests - 1				
3	Parent Meeting - 4				
4	Student Meeting - 1				
5	Parent/Teacher Conference - 3	Referral Date	Followup Date	Notification Date	
6	Parent/Teacher Conference - 3		09/02/2015	09/02/2015	
7	Parent Meeting - 4				
8	Parent/Teacher Conference - 3				

Comment: Discussed Billy's behavior in the classroom. His inattentiveness is beginning to impact his grade.

Generating Student Conference Reports

There are two types of Student Conference Reports available:

- **Individual Reports** print out information about a single student per page, but can be printed for multiple students at one time.
- **Summary Reports** present numerical report summaries.

Path: Synergy SIS > Student > Reports > Individual

CNF201 – Student Conference Profile report generates a list of a student's conferences including a description and comments. The user may select a student by Perm ID or Name. The user may also leave all Report Interface Options blank and print the report for all students in the school, or may filter by Grade Level, Grade Level range, and/or Gender.

Path: Synergy SIS > Student > Reports > Summary

CNF601 – Student Conference Summary report generates a summary of conference totals by Conference Code and Grade for a range of dates. The user must select a Grade or Grade Level Range and a beginning and end date for the report. This report is utilized by school administrative staff to monitor the use of conference codes and the frequency of events.

Self-Assessment Checklist

When attendees complete this training they will be able to:

- Manage Student Conference Information
 - Viewing Student Conference Details
 - Adding a Student Conference Event
 - Viewing Conference History
- Generate Student Conference Reports
 - For An Individual Student
 - By Conference Codes for a Summary of Events