



**Performance Support and
Learning Center**

Document	Participant Guide
Lesson	TTP Enrollment



TTP Enrollment Lesson Syllabus

COURSE OBJECTIVES AND OVERVIEW:

This lesson is designed to provide requisite knowledge and skills necessary to perform tasks of managing student enrollment.

PREREQUISITES:

We request that participants have these specific abilities prior to the Synergy SIS® training:

- Ability to use a Keyboard and Mouse
- Ability to navigate in Internet Explorer (for Microsoft* Windows*) or Firefox (for Macintosh*)

MEETING TIME AND PLACE:

Location:

Start Time: End Time:

YOUR INSTRUCTOR:

E-mail:

Phone: (480) 633 - 7300

MATERIALS NEEDED:

Instructor Guide

Participant Guide

TOPICS:

Welcome/Introduction

- Adding a New Student into Synergy SIS - Refer to: **EN 01 QRG; EN Screen 1**
- Transfer a Student from Inactive status to active - Refer to: **EN 02 QRG**
- Concurrently enroll a student in more than one school - Refer to: **EN 03 QRG**
- Inactivate or No Show a student - Refer to: **EN 04 and EN 05 QRGs; EN Screen 2**
- Manage student data on the Other Info Tab of the Student screen - Refer to: **EN 06 QRG; EN Screen 3**
- Manage Parent/Guardian information - Refer to: **EN 07 QRG; EN Screen 4**
- Manage Emergency contact information relating to students - Refer to: **EN 08 QRG**
- Correct Enrollment History information - Refer to: **EN 09 QRG; EN Screen 5**
- Manage important documents attaching to student records - Refer to: **EN 10 QRG**
- Practice exercise for Enrollment: **EN Exercise 1**

QUESTIONS/WRAP-UP:



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	<ul style="list-style-type: none"> ▪ Click Add – Student Add window displays. ▪ Input Last Name, Birth date, or Perm ID in appropriate fields in Find screen. ▪ Click Find or press ENTER. A list of students that match criteria entered displays. ▪ If student name appears on list, see <u>TG EN 02 QRG – Transfer a Student</u>. OR, if student name does not appear on list, proceed to next step. ▪ Click Add New. ▪ Starting with Demographics tab and continuing through all tabs available, complete all mandatory (green) fields.
Enter Demographic information	On Demographics tab, enter mandatory green field information. If other information is available, you may enter it at this time.
NOTE: Some districts may have policies having to do with “Base School/Home School”, “Reason for Attendance”, or “Placement Code and Placement Date.” Refer to your District Policy.	
	<ul style="list-style-type: none"> ▪ If Home Language selection is not English, Language To Home must also be completed ▪ Select Primary Ethnicity ▪ Select all Secondary Ethnicities that may apply for student. ▪ Select Mail same as Home Address if appropriate. (Optional for Districts using Grid Code) Click Validate to make sure home address is within your school boundaries ▪ Click Add on grid to complete phone number(s), ▪ Select Primary checkbox if this is primary phone number for student ▪ Select Type from drop down list ▪ Complete Phone and Extension fields ▪ Select Contact checkbox if this is a phone number that can be used to contact student



	<ul style="list-style-type: none"> ▪ Select Not Listed checkbox if this phone number is NOT to be printed on any reports ▪ Select No Phone if student has no home or cell phone number.
Enter Other Info information	<ul style="list-style-type: none"> ▪ Select Other Info tab. ▪ Enter a New Year Action. If New Year Rollover has taken place enter either “Do not enroll student in new year” or “Enroll student in the new year”. <p>If you select “<i>Enroll student in the new year</i>” make sure to select <i>Next Grade Level and Next School</i> from drop-down.</p>
Enter Parent/Guardian information	Each student MUST have at least one (1) parent/guardian record entered at time of enrollment.
Add Existing Parent/Guardian Record To New Student	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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 checkbox does not need to be checked.	
Enter Emergency information	<ul style="list-style-type: none"> ▪ Go to Emergency tab. <p>Emergency Contacts</p> <ul style="list-style-type: none"> ▪ 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 <p>Physician Information</p> <ul style="list-style-type: none"> ▪ Input physician, hospital, and insurance information. There is a box for optional comments. <p>Dentist Information</p> <ul style="list-style-type: none"> ▪ Input dentist's name, phone number, and office address. There is a box for optional comments. <p>Contact Order</p> <p>This is filled out after the Student record is saved.</p>
Enter Enrollment information	<ul style="list-style-type: none"> ▪ Select Enter Date if different from current date ▪ Select appropriate Enter Code from drop down list. ▪ Enter all other information specified into appropriate fields in Enrollment Activity group box and Other Enrollment Information group box. ▪ Click Save.
Maintaining Student Data after student enrollment	<ul style="list-style-type: none"> ▪ Review the field types used on the Student screen and decide how your District Policy will dictate their use.
Edit protected data	<ul style="list-style-type: none"> ▪ On Demographics tab, click Menu. ▪ Select Edit Student Data. This changes background of critical data fields from gray to white. ▪ Change appropriate data as necessary. ▪ Click Save.



Add a Student

Screen EN 01

Student

Demographics
Other Info
Parent/Guardian
Emergency
Enrollment
Classes

Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	State Testing ID
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Student Information

<div style="background-color: #e0e0e0; padding: 2px; text-align: center;">No Photo</div> <div style="background-color: #e0e0e0; padding: 2px; text-align: center;">Edupoint</div> <div style="background-color: #e0e0e0; padding: 2px; text-align: center;">On file</div>	Gender	Home Language	Language To Home	Primary Language	Other
	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
	Nick Name	Last Name Goes By	AKA Last Name	AKA First Name	AKA Middle Name
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Birth Date	Birth Place	Birth State	Birth Country		
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>		
Birth Verification	Birth Verification Other	Birth Certificate Num	Email		
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>		

Race and Ethnicity

Hispanic/Latino	Federal Ethnic Code
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Race <input type="checkbox"/> <input type="checkbox"/>	
<input type="checkbox"/> AFRICAN AMERICAN	<input type="checkbox"/> CAUCASIAN
<input type="checkbox"/> ASIAN	<input type="checkbox"/> NATV HAWAIIAN/PACIFIC ISLANDER
<input type="checkbox"/> AMERICAN INDIAN	

Home Address

Address	As Of Date	Validate
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input type="checkbox"/> Mail same as Home Address
	Change Date	
	<input style="width: 95%;" type="text"/>	
City	State	ZIP Code + 4
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Grid Code	District of Residence by Address	County by Address
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
School of Residence	Reason for Attendance	Reason for Attendance Date
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Mail Address

Address
<input style="width: 95%;" type="text"/>
City
<input style="width: 95%;" type="text"/>
State
<input style="width: 95%;" type="text"/>
ZIP Code + 4
<input style="width: 95%;" type="text"/>

Phone Numbers

No Phone

X	Line	Primary	Type	Phone	Extension	Contact	Not Listed

ELL Languages



Transfer a Student

Quick Reference Guide (QRG) EN 02

PATH Synergy SIS → Student → Student

How to:	Steps:
Complete a Student Transfer	<ul style="list-style-type: none"> ▪ Click Add – Student Find window displays. ▪ TYPE Last Name, Birth date, or Perm ID in appropriate fields in Find screen. ▪ Click Find or press ENTER. A list of students that match criteria entered displays. ▪ Click Line Number of student to be transferred.
<p>NOTE: Student’s name must be in a yellow highlighted field with “I” in first column in order to transfer student to your school. If this is not case, you must contact register at student’s former school and request to inactivate student from their enrollment.</p>	
	<ul style="list-style-type: none"> ▪ Click Transfer at the bottom of the window. Demographics Tab displays student’s name and other identifying data.
Verify/Enter Demographic Information	<ul style="list-style-type: none"> ▪ On Demographics tab, verify/enter field information. If additional information is available to you not already listed, enter it at this time. <ul style="list-style-type: none"> ○ If Home Language selection is not English, Language To Home must also be completed. ○ Verify Race and Ethnicity information ○ (Optional for Districts using Grid Code) Click Validate to make sure home address is within your school boundaries ○ Verify or add/edit phone number(s) <ul style="list-style-type: none"> ▪ Edit phone number by clicking in Phone field and changing the number ▪ Add a new phone number by clicking Add on grid, ▪ Select Primary if appropriate ▪ Select Type ▪ Type new number in Phone and Extension ▪ Select Contact if this number can be used to contact student ▪ Select Not Listed if this phone number is NOT to be printed on any reports ○ Select No Phone if student does not have a home or cell phone number
<p>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.</p>	



<p>Enter Other Info information</p>	<ul style="list-style-type: none"> ▪ Go to Other Info tab. ▪ A field called New Year Action for student may appear for mandatory action. If New Year Rollover has taken place, choose either <i>Do not enroll student in the new year</i> or <i>Enroll student in the new year</i>. ▪ If you select <i>Enroll student in the new year</i> be sure to select Next Grade Level and Next School from drop-down ▪ Select Primary Ethnicity ▪ Check all Secondary Ethnicities that may apply for student.
<p>Verify/Enter Parent/Guardian Information</p>	<p>Each student MUST have at least one (1) parent/guardian record entered at time of enrollment.</p>
<p>Add Existing Parent/Guardian Record To New Student</p>	<ul style="list-style-type: none"> ▪ 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..
<p>Add New Parent/Guardian Record To New Student</p>	<ul style="list-style-type: none"> ▪ 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.



<p>Verify/Enter Emergency information</p>	<ul style="list-style-type: none"> ▪ Go to Emergency tab. <p>Emergency Contacts</p> <ul style="list-style-type: none"> ▪ 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 <p>Physician Information</p> <ul style="list-style-type: none"> ▪ Input physician, hospital, and insurance information. There is a box for optional comments. <p>Dentist Information</p> <ul style="list-style-type: none"> ▪ Input dentist's name, phone number, and office address. There is a box for optional comments. <p>Contact Order</p> <ul style="list-style-type: none"> ▪ This is filled out after the Student record is saved.
<p>Enter Enrollment information</p>	<ul style="list-style-type: none"> ▪ 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.
<p>Maintaining Student Data after student enrollment</p>	<ul style="list-style-type: none"> ▪ Review the field types used on the Student screen and decide how your District Policy will dictate their use.
<p>Edit protected data</p>	<ul style="list-style-type: none"> ▪ On Demographics tab, click Menu. ▪ Select Edit Student Data. This changes background of critical data fields from gray to white. ▪ Change appropriate data as necessary. ▪ Click Save.



Concurrent Students

Quick Reference Guide (QRG) EN 03

This document will guide you through the process of adding concurrent students to your school.

Business Rules that apply are as follows:

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.

Withdrawing Concurrent Students **MUST** be Inactivated on the Student screen

PATH Synergy SIS → Student → Student

How to:	Steps:
Add Concurrent Students	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ Verify mandatory fields: (green) Student’s legal name, grade, gender, ethnic code, birth date, and home address.
Other Info Tab	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ Enter date MUST be one (1) school date later than the Home school’s enter date. ▪ Click Save.
<p>NOTE: Concurrent students are identified as Concurrent in ADA/ADM field. Do not change.</p>	
Withdrawing concurrent students MUST be inactivated in Student screen	<ul style="list-style-type: none"> ▪ Click Menu at top of screen. ▪ Select Inactivate Student. ▪ Select appropriate W code (matching the Home school) from drop-down list. ▪ Click Save.



No Show a Student

Quick Reference Guide (QRG) EN 04

This document will guide you through process of “no showing” a student at your school.

Business Rules that apply are as follows:

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.

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

PATH Synergy SIS → Student → Student

How to:	Steps:
<p>No Show a student who has not attended class this school year.</p>	<ul style="list-style-type: none"> ▪ Open Student screen. Find student to be no showed using student name or ID. ▪ Click Menu. ▪ Select No Show Student. No Show Student screen displays. ▪ Enter Summer Withdrawal Code and Summer Withdrawal Date. ▪ Click No Show. <i>Student set to No Show</i> message box displays ▪ Click OK.
<p>Summer Dropouts</p>	<ul style="list-style-type: none"> ▪ 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.
<p>Miscellaneous</p>	<ul style="list-style-type: none"> ▪ 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


Quick Reference Guide (QRG) EN 05

This document will guide you through the process of inactivating a student within the Synergy SIS program.

Business Rules that apply are as follows:

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:
<p>Inactivate Student Who Has Attended Class This School Year</p>	<ul style="list-style-type: none"> ▪ 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 displays. ▪ Enter Leave Date and Leave Code (MMDDYY) or click  and select the date. ▪ Select Drop Classes on Inactivation in Advanced Options group box. ▪ 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 applicable. ▪ Advanced Option: “Drop Classes On Inactivation” This setting is found in District Setup > System Tab > Show Advanced Options On Inactivate Student ▪ Click Inactivate. Student displays with parenthesis around name indicating that they are inactive. Focus needs to be set as show both Active and Inactive for this to display.



Inactivate a Student

Screen EN 02

Inactivate Cancel

Inactivate Student

You are about to inactivate 'Gadek, Adam S.'. Fill in the leave date, enter the leave code and press the Inactivate button to complete the Inactivation or Cancel to abort.

Leave Code Leave Date

Advanced Options

Drop Classes On Inactivation
Course requests will be removed and not added back based on the student's schedule

Next Year Enrollment Action Summer Withdrawal Code Summer Withdrawal Date

information in the new year. Please specify how you would like to address the enrollment

- Delete Enrollment
- Do Nothing
- No Show




Other Info Tab

Quick Reference Guide (QRG) EN 06

This document will guide you through the process of completing the Other Info tab for student demographic information within the Synergy SIS program.

Please call your School District Support if you have questions.

PATH Synergy SIS → Student → Student → Other Info tab

Student Screen, Other Info Tab	<ul style="list-style-type: none"> ▪ Verify that student's name, perm ID, and grade appear accurately on tab panel.
Expand sections	<ul style="list-style-type: none"> ▪ Make certain all sections are expanded by clicking  in right upper corner of section.
School Information	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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)	<ul style="list-style-type: none"> ▪ After New Year Rollover processing has been started, Year End Status, Next Grade Level, and Next School will be populated.
User Codes	<ul style="list-style-type: none"> ▪ <i>Dependent on District's final choices.</i> Complete information fields.
Graduation Information	<ul style="list-style-type: none"> ▪ Following New Year Rollover, Graduation Date, Graduation Status, Expected Graduation Month, and Expected Graduation Year, will be populated.
Lockers Middle or high school	<ul style="list-style-type: none"> ▪ This field will populate from Mass Locker Assignment within Synergy SIS once locker numbers have been imported.



Other Info Tab

Screen EN 03

*School District, please insert screenshot of
Student screen, Other Info tab on this page.*



Add Parent/Guardian

Quick Reference Guide (QRG) EN 7

This document will guide you through the process of adding a parent/guardian to a student record in four ways. Please carefully select the process that best fits your purpose.

Business Rules that apply are as follows:

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:
<p>Add Existing Parent/Guardian Record To New Student</p>	<ul style="list-style-type: none"> ▪ 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..
<p>Add New Parent/Guardian Record To New Student</p>	<ul style="list-style-type: none"> ▪ 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.
<p>NOTE: If a student Lives With a parent then Mailings Allowed does not need to be checked.</p>	



Add Parent/Guardian

Screen EN 04

School District, please insert screenshot of Student screen, Parent/Guardian tab on this page.



Emergency Information

Quick Reference Guide (QRG) EN 08

This document will guide you through the process of adding emergency information to a student record.

PATH Synergy SIS → Student → Student → Emergency tab

How to:	Steps:
Verify/Enter Emergency information	<ul style="list-style-type: none">▪ Go to Emergency tab. <p>Emergency Contacts</p> <ul style="list-style-type: none">▪ 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 <p>Physician Information</p> <ul style="list-style-type: none">▪ Input physician, hospital, and insurance information. There is a box for optional comments. <p>Dentist Information</p> <ul style="list-style-type: none">▪ Input dentist's name, phone number, and office address. There is a box for optional comments. <p>Contact Order</p> <ul style="list-style-type: none">▪ This is filled out after the Student record is saved.



Enrollment History Information

Quick Reference Guide (QRG) EN 09 QRG

This document will guide you through the process of editing enrollment information for a student record.

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**.



Enrollment History Information

Screen EN 05

Student

Student Name: **Abbott, Billy C.** School: **Hope High School** Homeroom: **403** Teacher: **Sullivan, J.** VerboseAge: **17 yrs 9 mths**

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

Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Suffix: Perm ID: **905483** Grade: **11** Gender: **Male**

Line	School Year	Enter Date	Enter Code	Leave Date	Leave Code	Grade	School	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2008-2009	08/04/2008	E6			07	Eisenhower Middle School				
2	2009-2010	08/10/2009	E1			08	Eisenhower Middle School				
		09/2010	E2			09	High				

Enrollment History

Student Name: **Abbott, Billy C.** School: **Eisenhower Middle School** School Year: **2008-2009**

Enrollment Other Information

School Enrollment Add Show Detail

Line	Enter Date	Enter Code	Leave Date	Leave Code	ADA/ADM	Track	Withdrawal Reason Code
1	08/04/2008	E6					

Enrollment History

Student Name: **Abbott, Billy C.** School: **Eisenhower Middle School** School Year: **2008-2009**

Enrollment Other Information

School Enrollment

Line	Enter Date	Enter Date	Enter Code	ADA/ADM	Track
1	08/04/2008	08/04/2008	E6-First Arizona en		

Leave Date Leave Code Withdrawal Reason Code

School Completion Code College Enrolled

Enrollment Activity

Line	Effective Date	Override ADA/ADM of No	Grade	Previous Grade Exit Code	FTE	Inst Setting	Access 504	DOR
1	08/04/2008		170		1.00			




Documents Tab Information

Quick Reference Guide (QRG) EN 10 QRG

This document will guide you through the process of adding documents to a student record.

PATH Synergy SIS → Student → Student → Documents tab

Add Document	<ul style="list-style-type: none">▪ Go to Documents tab.▪ Click Add on Documents grid. The Attach document window displays.▪ Click Browse...▪ Select file to upload.▪ Click Upload. A message displays Upload Successful.▪ Click OK. Uploaded document displays on Documents grid
Delete Document	<ul style="list-style-type: none">▪ Check  on line of the document to delete.▪ Click Save.



EN Exercise 1

Enrollment

<u>ACTIVITY/QUESTION</u>	<u>RESPONSE AND NOTES</u>
1. When you “Hover” over a field, what information is shown?	
2. If several users have access to update the Student View, how would you know if you were looking at the latest data for a student?	
3. Add a new student. Give them an enter date. Write the name of your student down. They were home schooled since the beginning of the year. What enter code should you use?	
4. If you are attempting to enroll a new student and you discover that their name with the correct parent/guardian name is already in Synergy SIS, what should you do next?	
5. The New Year Rollover has taken place. Enroll student (from #3) in the new year” What else must you do to complete this action?	
6. Inactivate the student you added in number 3. Give them a leave date. They are moving to another district school. What would be the leave code?	



<p>7. Transfer the inactive student back into your school. Give them an enter date and an enter code of ____?</p>	
<p>8. Change the students address and phone number. Make sure to change all family members too.</p>	
<p>9. Mom just got remarried j you need to add the stepfather on the Parent/Guardian tab in the Student View.</p>	
<p>10. The stepfather has no educational rights but contact is allowed and the student lives with him. Update the student record</p>	
<p>11. Run the birthday list for all teachers in your school for August. What is the Report ID?</p>	
<p>12. Where would you look to see the enrollment changes you have made?</p>	
<p>13. Add three emergency contacts.</p>	
<p>14. Dad has changed jobs and you need to update his phone numbers.</p>	

