

Synergy Data Entry and Reports

Entering SAT In Synergy (Initial)

- Select Tree
- Select “Synergy SIS”
- Select “Test History”
- Select “Student Test”
 - Click on magnifying glass.
 - Enter search criteria (name or pupil ID). Press “Enter”.
 - Click the “Add” button on far right.
 - A new window will appear: Find: Test
 - Select “SAT” from the “Test Type” dropdown menu.
 - Select Find
 - Highlight “Student Assistance Team Referral” in the Search Results
 - Click “Select”
 - Enter the date the student was referred for the current school year in the “Admin Date”

Entering AIP In Synergy

- Select Tree
- Select “Synergy SIS”
- Select “Student Programs”
 - Select “Student Needs”
 - Click on magnifying glass and enter student’s name or pupil ID
 - When on the correct student, under “Program” and “Needs” click on the arrow next to the blank box.
 - Choose **Academic Need**
 - A new window will pop up that says **Add Program** and **Program Code**.
 - Choose the arrow next to the blank box and then select the correct **Academic Improvement Plan**
 - Type in correct **Effective Date**.
 - Save Program

Entering Additional AIPs In Synergy

Whenever the initial AIP has been closed out, there are slightly different procedures for adding additional AIPs.

- Select Tree
- Select “Synergy SIS”
- Select “Student Programs”
 - Select “Student Needs”
 - Click on magnifying glass and enter student’s name or pupil ID

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- When on the correct student, under “Program” and “Needs” click on the arrow next to the blank box.
- In the “Needs” Section, double click on the “Line” number.
 - You will see a pop-up window: Program Code
 - Click on the “Add” button on the far right
 - Enter date of the new AIP
- Click “Save” button at the top

Exiting AIP In Synergy

To close AIP, follow the same steps, but instead of “Effective Date”, select **Exit Date**.

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Generating Reports in Synergy

SAT Student List

- Select Tree
- Select “NM”
- Select “SAT”
- Select “Reports”
 - Click on “U-SAT-01-SAT”
 - Click on tab “Sort/Output”
 - Click on “File Type”
 - Select “PDF” or “Excel”
 - Click on “Print” at the top

Student Programs List (To find out who is on a 504 or an AIP)

- Select Tree
- Select “Synergy SIS”
- Select “Student Programs”
- Select “Reports”
 - Click on “List”
 - Click on “PGM 408 Student Programs List”
 - Click on tab “Sort/Output”
 - Click on “File Type”
 - Select “PDF” or “Excel”
 - Click on “Print”
 - Download and save report
 - If you saved it as an excel worksheet, you can
 - Filter by “504” and/or
 - Filter by “Academic Need”

Evaluation Due Dates/IEP Due Dates/Eligibility List

- Synergy SE
 - Student
 - Reports
 - Evaluation Due Date
 - Check all boxes that apply
 - Print
 - IEP Due Date Report
 - Email content: K12.SpecialEd.IEPDue
 - Days to Look Ahead: 365
 - Type: School and Business Calendar

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- Print
- Eligibility List
 - Same as IEP Due Date Report