Online Registration Guide

Synergy®
Education Platform

Edupoint®

About This Manual

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

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

Conventions Used in This Manual

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

Notes provide additional information about the subject.

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

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

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

Before You Begin

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

Software and Document History

Document Version	Release Date	Software Release	Description
7.0	May 2017	2018	Updates: • Revised TOC and guide organization • Added Caution under Registration Enabled option in Online Registration Setup • Added Mail Merge Name and Registration Accept Options to Online Registration Setup • Added Notify and Parent/Guardian Security sections in Parent/Guardian module in Online Registration Setup • Updated Parent/Guardian module minimum and maximum contacts in Online Registration Setup • Added new options for the School Selection module in Online Registration Setup • Added Parent Screen in Reviewing Registrations • Added Custom Grids information and View Change limitations note in Customizing Online Registration • Added Customizing Module Pages • Added Parent Limited Registration Rights • Added Mail Merge Documents • Added Verify Reenrollment • Added Google Address Validation Opt Out • Added Address Autocomplete • Updated screen options in Google Maps API Key Setup and Address Setup
8.0	Dec 2017	-	• Updated images for quality and consistency

Document Version	Release Date	Software Release	Description
9.0	Dec 2017	2018.01	Updates: • Added Customizing Parent Registration Options • Added Setting Visibility Based on Student Enrollment • Added ParentVUE Account Creation Options • Added Comparing Emergency Contacts • Added Field Security • Removed Translation screen setup information from Translation Setup. This content is available in the System Administration Guide. • Updated Uploading Policy Documents with new options in ParentVUE Setup • Added Registering Parent Name to History tab section, Not Returning icon in Reenroll column, and highlighted changes to individuals in Registration Queue • Added note for Document Visibility options, new Home Address Verification validation options, Show Student Not Returning option, and note for student Contact Info page in Setting Up Registration Modules • Added description of Immunization and Immunization Status pages to Setting Up Registration Modules • Added View Only for Reenrollment option to Address Setup • Added note on label priority for fields in Customizing Online Registration • Added Creating Document Translations and Enabling Other Languages in OLR to Translation Setup • Added Prevent Acceptance for Inactive Students to Registration Queue Setup • Added signature match note, Primary Address note, and info not required for new parents note to Create Account (see Parent Instructions) • Added Force Registration option, Reenroll Filter option, note for Verification Process Enabled, Show Student Not Returning Option, and Automatically exclude re-enrolling students on registration option in Online Registration Setup • Added Not Returning to District option to Verifying Reenrollment
9.1	Mar 2018	-	Updates: • Corrected navigation path to FRM Code in Lookup Table Definitions • Modified Lookup Table Values

Document Version	Release Date	Software Release	Description
10	Jun 2018	2019	Updates: - Updated Setting Up Registration Modules: - Added note regarding duplicate student/parent relationship records in the Non-Student Enrollment Modules section - Added **Required number of secondary forms for address verification** for the Family module in - Added **Maximum number of parent/guardians per student**, **Allow Editing Other Parents**, and **Require an Email Address for Parents** for the Parent/Guardian module - Added the Demographics Continued page to the Demographics module - Updated ParentVUE Account Creation Options to reflect that options moved to the **Online Registration** tab on the ParentVUE and StudentVUE Configuration screen - Added Disabling Links between OLR and ParentVUE - Added Creating Person Notification Codes - Added Emptying the Email Queue, Emailing Notification of Missing Parent Email Address, Emailing Notification of Invalid Parent Email Address, and Sample Email Content to Email Setup - Added Require Review Before Submit to Online Registration Setup - Added **Do Not Show in Online Registration** to the Uploading Policy Documents section in ParentVUE Setup - Added additional parent security rights in Parent Registration Rights - Added Open Online Registration from Parent - Updated Managing the Registration Queue: - Added note for queries and note for **Disable validation on accept** - Added Using Filters, Viewing Uploaded Documents, Viewing Changes and Critical Changes, and updated the registration flag types - Added Viewing Registrations on the Parent Tab - Added Viewing Data Imported from Online Registration - Added Online Registration Security and moved all existing and new Security Definition and PAD Security to this chapter - Moved all security setting information for parents to Parent Registration Rights

Document Version	Release Date	Software Release	Description
11	Dec 2018	2019.01	Updates: • Corrected Business Option in Reference Note in Managing the Registration Queue • Updated Google Maps API Key Setup • Added Defining Emergency Contact Order • Updated Setting Up Registration Modules for Military Status • Updated Grade Validation Setup for excluding grades • Added a note in Using School Setup for hiding the School Selection Override section • Updated **Options** Tab for Student Summary • Added Defining Custom Condition Library • Updated Adding Custom Documents and Setting Up Registration Modules for Conditions • Added Restrict Editing Existing Student Phone Numbers in Setting Visibility Based on Student Enrollment Status • Added Excluding Document Categories in Creating Custom Student Documents • Added steps and examples for changed data highlighted in yellow and blue and tooltip for changes made by the enrolling parent or registrar in Reviewing Online Registrations • Added a note for accepting pending registrations that have custom student documents attached in Accepting Online Registrations • Added a note for registration count in Registrations with No Changes, Viewing the Registrations Tab, and History Tab in Managing the Registration Queue, and Students Tab and History Tab in Reviewing Registrations • Updated Student-Specific Enrollment Modules and Security Definition for Months Non-US School Attendance • Updated Viewing Changes and Critical Changes for Registration Flags • Added Hide Emergency Contact Demographic in PAD Security • Added PVUE user Security Definition for Emergency Contact fields and Parent Guardian Phone Numbers • Added Hiding the Condition Snapshot in More Security Definitions

Document Version	Release Date	Software Release	Description
12	Jun 2019	2020	Updates: • Added Automatically Updating Task Notifications • Added Defining Receiving Schools • Added Using Synergy SIS Query to Create a Condition • Added Setting Up Auto-Accept • Added Setting Up Pathways for School Selection • Added **Require home address to be inside district boundary** and **Require at least one row in the Military Status grid** to Non-Student Enrollment Modules • Added Import/Export Online Registration Setup • Added Overriding Account Information • Added Using Mobile Devices for Online Registration • Added Refreshing All Modules • Added Hiding Buttons in OLR Student Health Module • Added content for **Focus Filter** in Displaying Tasks for OLR User Groups

Table of Contents

Chapter 1: Overview

Overview of Synergy Online Registration (OLR)

This guide describes the setup and configuration of Synergy Online Registration (OLR). The OLR module allows districts to control and manage registration in Synergy, reducing processing times, eliminating paper forms, and ensuring data accuracy.

With OLR, districts define a multi-lingual, self-service parent portal for online student registration. OLR handles the registration events of students new to the district and the registration events of already enrolled students, such as the annual updating of student information.

Optional Functionality

Optional functionality includes:

- Custom email messages to parents regarding registration
- Allowing a student to register in a different school than the one assigned during the New Year Rollover process
- Address validation, including stopping registration if home is outside of boundary and showing multiple schools for selection
- Showing tasks on the home screen for school personnel to review and approve registration
- Controlling the number of student's registered for a grade
- Excluding schools from selection

Enrollment Options

Online registration allows for the following enrollment options:

- Allow new enrollments and re-enrollments (Default)
    - This is the default setting for Online Registration. The system uses this option if left blank.
    - Allows parents to re-enroll existing students and add new students.
- Do not allow new enrollments
    - Allows parents to re-enroll existing students but not add new students. The **Add New Student** option is hidden from view.
- Only allow new enrollments
    - Allows parents to enroll new students but not register existing students.

ParentVUE Information

When parents/guardians register their children using the Synergy Online Registration process:

- Existing parents in the school district log on to their ParentVUE account to enroll their children using online registration.
- New parents to the school district use the district site for online registration to enroll their children. The online registration uses a different login screen. **/Login_parent_OEN.aspx**.

> See the following for more information:
>
> - *Online Registration for Parents New to District*
> - *Online Registration for Parents with ParentVUE Accounts*

Implementation Considerations

Online Registration Setup is district-wide setup with optional school settings. There are various options to configure OLR to function appropriately for your district.

Setting up user groups

- Define a user group to control registration.
- Consider a separate user group for users assigned the tasks for online registration records review.
- Use Task Definition to notify user groups of online registration tasks on the Synergy home screen

Setting up schools for online registration

- Do you want to control grade capacity?
- Do you want to exclude some schools from selection during online registration?
- Do you want to include only a small number of schools that use online registration?

Notifying parents

- After parents submit a new account application, the system sends a system-default confirmation message to their email account to complete account creation. See OLR Registration Notifications and New Account Email to create a custom message.
- Will parents receive a ParentVUE message to notify them that online registration is available?

Using addresses in online registration

- Do you want to use drop-downs for address selection?
- Do you want to authenticate addresses against address grid definitions?
- Do you want to allow multiple schools be listed for an address grid?
- Will online registration stop if the family lives outside of the school boundaries?

Limiting online registration based on student type

- Do you want to allow online registration for all new and existing students?
- Do you want to allow parents to edit, exclude, or delete existing students?

Before Starting

- You must complete the set up process for ParentVUE.

  See the *ParentVUE and StudentVUE Administrator Guide*.

- You must enable Email in System Configuration.

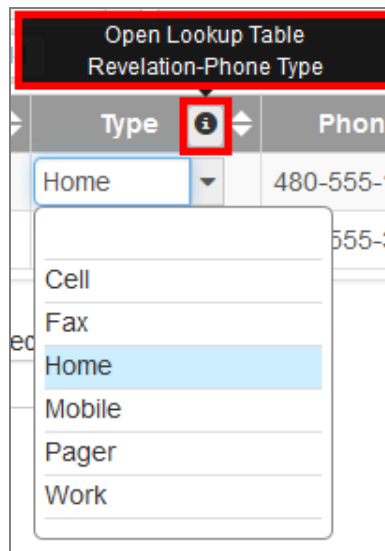 See the *Synergy SIS – System Administrator Guide*.

Chapter 2: Setup

Lookup Table Setup

Some drop-downs and checkbox lists use values configured in lookup tables. Hover over a field to view a tooltip icon that indicates which table controls the field.

Lookup Table Values Example

Product-owned lookup tables use hard-coded values that are core to the programming and cannot be changed. You can customize other lookup tables to match district specifications and state reporting needs.

Consult the list of lookup tables for your state in the appropriate State Reporting Guide to identify tables that require a specific value.

The **Name** of the table is listed and the **Namespace** lists the business object the table belongs to at the top of the table. The **Locked** value indicates if the table is locked and product-owned.

Name: **Dwelling Type**   Namespace: **K12.Demographics**   Locked: **No**

Dwelling Type Lookup Table

Add Values to Lookup Tables

> Hover over the field and click the tooltip icon ⓘ to open the Lookup Table screen in a new window for editing. This allows you to quickly edit values. Refresh the original Synergy SIS screen after modifying values in lookup tables to view changes.

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Locate the desired table.
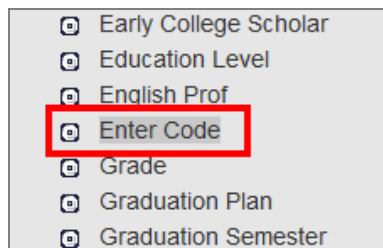
PAD Tree

Namespace: **K12** Name: **Enter Code** Locked: **N**

☐ Use Code as the State Code

All values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a given value

⊕ Lookup Values ➕ Add

✖ ▾	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Ed-Fi Code	Federal Code	Year Start	Year End
☐	1	0	E1	New to District					▾		▾	▾
☐	2	0	E2	Re-Enter					▾		▾	▾
☐	3	0	R1	Previously In School					▾		▾	▾
☐	4	0	R2	Return from Last Year					▾		▾	▾

Enter Code Lookup Table

3. Click **Add** in the Lookup Values section to add a new line.
4. Enter a **ListOrder** to display the list in a specific order, if needed.
5. Enter a **Code**. This value must be unique.
6. Enter a **Description**. This information displays as an option in the drop-down.

> The lookup values are sorted by **ListOrder** first, then by **Code**, and then by **Description**.

7. Enter the **Other SIS** code to import data during the conversion process from another student records system.
8. Enter the **State Code**, if assigned.
9. Enter the **Alt Code 3** and **Alt Code SIF** if used for reporting or system interoperability purposes, if needed.
10. Enter the **Ed-Fi Code** if your district is part of the Ed-Fi Alliance, if needed.

> See your State Reporting Guide to identify if there is a specific code required.

11. Enter a **Year Start** and/or **Year End** date to activate or deactivate the code, if appropriate.

> Inactive codes show in historical data but are not available for selection for new records.

12. Click **Save**.

Assign a State Reporting Code to an Existing Lookup Table Value

> See your State Reporting Guide for more information.

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Locate the desired table.
3. Enter the appropriate state reporting **Code**, **State Code**, or **Alt Code 3** on a populated Lookup Value line.

Namespace: **K12** Name: **Enter Code** Locked: **N**

☐ Use Code as the State Code

All values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a given value

⊕ Lookup Values   ✚ Add

✖ ⌄	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Status Year Start	Year End
☐	1	0	E1	New to District				⌄	⌄
☐	2	0	E2	Re-Enter				⌄	⌄
☐	3	0	R1	Previously in School				⌄	⌄
☐	4	0	R2	Return from Last Year				⌄	⌄

Enter Code Lookup Table

4. Click **Save**.

Deactivate a Lookup Table Value

This procedure describes how to deactivate a lookup table value containing codes that are no longer valid. Deactivated values are no longer available for selection but remain in Synergy SIS for historical reporting purposes.

> ⚠ Do not modify or delete lookup table values that contain outdated state reporting codes. These are still used for historical reporting purposes. Instead, deactivate the value and then add a new lookup table value that contains the updated state reporting codes.

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Locate the desired table.
3. Remove the text in **State Code** on the lookup value line.

4. Select the last year the lookup table value is valid in the **Status Year End** field.

Enter Code Lookup Table

5. Click **Save**.

Sort Lookup Values

Click the up and down arrows in any column heading to temporarily change the sort order of the Lookup Values section.

Enter Code Lookup Table

Change the **ListOrder** to permanently modify the sort order.

Enter Code Lookup Table

Lookup Table Definitions

> * Indicates there are specific entries required for these lookup tables. Click the lookup table name to be redirected to these specific entries.
>
> ^ Indicates there might be state-specific entries required for these lookup tables. Reference your state reporting guide for these values.

Lookup Table	Purpose	Screen	Page	Module	Field
K12.Demographics					
Deny Photo Interview	Allows parents/guardians to deny photos and/or interviews of the students to be released	Online Registration	**Students**	Information Release	**Allow for the release of student photo or interview**
Family Code	Allows parents/guardians to indicate their family status or code. Online Registration pulls the student data for Family Code during reenrollment. (Ex. *Single-parent family*, *Foster family*)	Online Registration	**Students**	Demographics	**Family Code**
Internet Authorization	Allows parents/guardians to deny access to internet sites for students	Online Registration	**Students**	Information Release	**Authorization to use the internet**
Lookup Table	**Purpose**	**Screen**	**Page**	**Module**	**Field**
K12.ProgramInfo					
Frm Code	Allows parents/guardians to indicate eligibility for free or reduced meals. Online Registration pulls the student data for FRM Code during reenrollment.	Online Registration	**Students**	Demographics	**Eligible for free or reduced meals?**
Lookup Table	**Purpose**	**Screen**	**Page**	**Module**	**Field**
K12.TransportationInfo					
Transportation Requirement	Allows parents/guardians to indicate special transportation requirements for students (Ex. *Wheelchair ramp*, *A/C*)	Online Registration	**Students**	Transportation	**Special Transportation Requirement**

Lookup Table	Purpose	Screen	Page	Module	Field
Revelation					
Attach Doc Category	Allows parents/guardians to select the category of documentation for identity and birth validation (Ex. *Birth certificate*, *Medical records*) NOTE: You must include lookup entries for *Birth Certificate* and *Special Education Documents*.	Online Registration	**Students**	Demographics	**Birth verification document type**
Country ^	Allows parents/guardians to indicate the student's country of birth	Online Registration	**Students**	Demographics	**Student's birth country**
Phone Type*	Allows parents/guardians to indicate the type of phone number in contact information	Online Registration	**Parent/Guardian**	Demographics > Contact Info	**Type**
State ^	Allows parents/guardians to indicate the student's state of birth	Online Registration	**Students**	Demographics	**Student's birth state**

Country

If the highlighted fields display after selecting another birth country in Online Registration (OLR), they are required by your state and additional setup is necessary.

Online Registration, Students Tab, Additional Information Page

The Lookup Table is found at **Revelation > Country**.

You must include lookup entries for *Canada* and *Mexico* if your state requires additional information for students who were born in Canada or Mexico.

Namespace: **Revelation** Name: **Country** Locked: **N**

☐ Use Code as the State Code

All values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a

Lookup Values   **+ Add**

✖	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3
☐	1	1	US	United States of America			
☐	2	2	AD	Andorra			
☐	3	2	AE	United Arab Emirates			
☐	4	2	AF	Afghanistan			
☐	5	2	AG	Antigua and Barbuda			
☐	6	2	AI	Anguilla			
☐	7	2	AL	Albania, People's Socialist Republic of			

Country Lookup Table

Phone Type

The Lookup Table is found at **Revelation > Phone Type**.

You must set the phone types used for contact information.

Code	Description
H	Home
C	Cell
W	Work
M	Message

> While you must use *H*, *C*, *W*, and *M* as the **Code** values, you can enter other values for the **Description**. For example, *H* must be used for home phone, but the description may be *Home* or *Home Phone*.

Namespace: **Revelation** Name: **Phone Type** Locked: **N**

☐ Use Code as the State Code

All values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a

⊕ Lookup Values ➕ Add

✖ Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3
☐ 1	0	C	Cell			
☐ 2	0	F	Fax			
☐ 3	0	H	Home			
☐ 4	0	M	Mobile			
☐ 5	0	P	Pager			
☐ 6	0	W	Work			

Phone Type Lookup Table

State

The Lookup Table is found at **Revelation > State**.

> You must include lookup entries for all provinces for Canada and all states for Mexico if your state requires additional information for students who were born in Canada or Mexico.

Namespace: **Revelation** Name: **State** Locked: **N**

☐ Use Code as the State Code

All values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a

Lookup Values **+ Add**

✖	Line	ListOrder ⬍	Code ⬍	Description ⬍	Other SIS ⬍	State Code ⬍	Alt Code 3 ⬍
☐	1	0	AA	Armed Forces Americas excl Canada			
☐	2	0	AB	Alberta			
☐	3	0	AE	Armed Forces Eur, Mid East, Africa, C			
☐	4	0	AGS	Aguascalientes			
☐	5	0	AK	Alaska			
☐	6	0	AL	Alabama			
☐	7	0	AP	Armed Forces Pacific			
☐	8	0	AR	Arkansas			
☐	9	0	AS	American Samoa			
☐	10	0	AZ	Arizona			
☐	11	0	BC	British Columbia			
☐	12	0	BC-MX	Baja California			

State Lookup Table

User Groups

Define OLR User Groups

Define additional User Groups for specific users of the online registration process.

> See the *Synergy SIS – System Administrator Guide* for more information on creating User Groups.

Displaying Tasks for OLR User Groups

1. Navigate to **Synergy SIS > System > Setup > Task Definition**.

   a. Select the **Enable** option for the following OLR modules:

   - **OEN Approval**
   - **Registration**

Task Definition Screen

   b. Select a **Focus Filter** to indicate the organizations and years for the Online Registrations waiting for approval that display for the user.

   - *User Focus* or Blank – Displays tasks that match the user's focus organization and year

   - *All Organizations* – Displays tasks for all organizations that match the user's current focus year

   - *All Years* – Displays tasks for all years that match the user's current focus organization

- *All Organizations and Years* – Displays all tasks, regardless of the user's current focus, organization, or year

> *User Focus* is used by default, if no option is selected.
>
> This option is only available for the *OEN – Registration Approval* **Module**.
>
> The Registration Queue screen opens from the Tasks section on the Synergy SIS screen and is not dependent on the current focus.

Task Definition Screen

c. Click **Save**.

2. Navigate to **Synergy SIS > System > User > User Groups**.

   a. Select the **POV** tab.

   b. Select *Yes* from the **Show Task List** to display new enrollment requests in Tasks on the Synergy SIS homescreen.

   c. Select the appropriate OLR Task Module:

   - **OEN – Data Review** – Select for user groups to be notified AFTER a student is accepted. This is the user group for the User Group to Notify for modules.

   - **OEN – ELL Registration** – Select to notify user groups of a new English Language Learner student.

   - **OEN – Registration Approval** – Select to notify user a new registration is in the queue waiting for acceptance/denial.

   d. Click **Save**.

User Groups Screen, POV Tab

   e. Repeat the steps for each additional user group.

3. Click to display all tasks related to the *OEN – Registration Approval*.

Synergy Title Bar

Synergy SIS Home Screen

The Tasks count reflects the correct value only when you log back in or refresh the page.
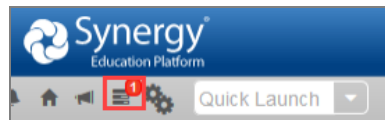
Synergy Title Bar

Synergy Title Bar

Automatically Updating Task Notifications

> Users need to be subscribed to the OLR Review Task on the Task Definition screen to receive task notifications.

1. Navigate to **Synergy SIS > System > Setup > Task Definition**.

2. Select **Enabled** and **On Start** for *OEN – Data Review*.

3. Click **Save**.

Task Definition Screen

Defining Receiving Schools

The Receiving Schools section in OLR allows a school district to define a central enrollment to review and process (manually or through a custom program) all registrations to determine a student's enrollment.

> ⚠️ Online Registration Setup is year-specific. Focus to the school year that the enrollment options affect.

> 📄 Inadequate setup of School Selection and Receiving School may cause the parent/guardian to receive an error upon Review/Submit if there is no option for a student to automatically be automatically assigned to a school or has an option for school selection. The error indicates that there is no receiving school for that student.
>
> If you do not want to display the central enrollment school option on the School Selection screen in OLR, ensure that the **Exclude From Online Registration** option on the School Setup screen is selected.

Receiving Schools

> 📄 Schools must be Live in Synergy SIS and must have the School Setup complete, including the grade selection.
>
> The **Receiving Schools** section overrides the selections made by the parent/guardian on the School Selection screen in OLR.
>
> The order of the receiving schools is important as each student is processed in the order entered in the **Receiving Schools** section.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Click **Add** in the Receiving Schools section.
3. Click 🔗 to select an OLR condition or select ➕ to create a new OLR condition.
4. Select the **Receiving School**.

> 📄 The *Student's School of Enrollment* evaluates the student's latest enrollment school and grade level for that registration year and displays it in the list of **Receiving Schools**. This option automatically places the re-enrolling student in their latest school of enrollment.

5. Click **Save**.

Online Registration Setup Screen

School Selection

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Module** tab.
3. Select the *School Selection* **Module** in the Student-Specific Enrollment Modules section.
4. Click **Show Detail**.
5. Enter the **Maximum** number for school choices up to 999.
6. Click **Save**.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail

Hiding the School Selection Module

> All student registration types must either have a receiving school or school selection before hiding the school selection option in OLR.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select the **Registration Modules** tab.

3. Click ![+] in **Condition** to create an OLR section.

4. Click ![link] for the *School Selection* **Module** to select the **Condition**.

5. Click **Save**.

Online Registration Setup Screen, Registration Modules Tab

Selecting Schools

The School Selection(s) column displays the first school selection. Hover the mouse on the column to list additional school selections if there are any for that student.

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

Registration Queue Screen

School Selection in Review/Submit

The Review/Submit screen displays many schools for selection.

1. Log in to OLR.
2. Select **Review/Submit**.
3. Click the *Show All* link in the **School Selection(s)** column to display all the schools selected for that student.

> This column initially lists the first five schools selected.

Online Registration, Review/Submit Screen

4. Click the *Show Fewer* link to display the initial five schools selected.

Online Registration, Review/Submit Screen

The enrolling parent/guardian may receive an error upon Review/Submit indicating students who have no receiving school. This error cannot be translated to another language.

Online Registration, Review/Submit Screen

Status Screen

The OLR Status screen displays differently to the parent/guardian depending on the setup completed for Receiving Schools and School Selection. This screen currently displays only the schools that are not overridden by the Receiving Schools, which makes the receiving school process seamless to the enrolling parent/guardian.

Online Registration, Review/Submit Screen

Google Maps API Key Setup

You can use Google Maps to:

- Validate OLR address fields
- Provide a map of the route from the student's home to the selected school on the OLR School Selection page are already documented:
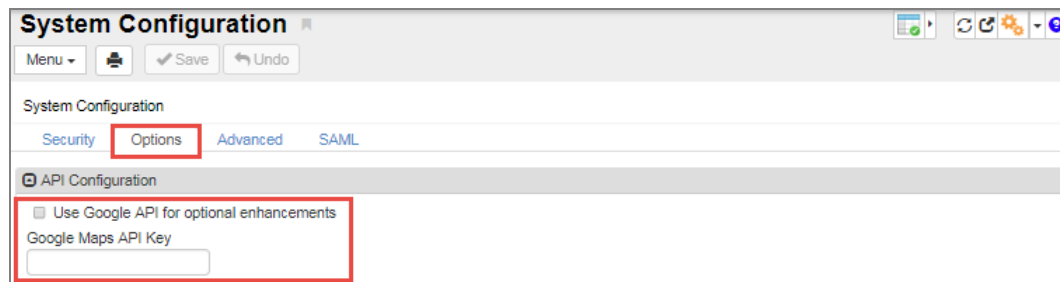
> See the following sites for details on acquiring a Google Maps API key (Standard or Premium) and usage limits:
> - https://cloud.google.com/maps-platform/products/
> - https://cloud.google.com/maps-platform/places/

1. Navigate to **Synergy SIS > System > Setup > System Configuration**.
2. Select the **Options** tab.

3. Clear the **Use Google API for optional enhancements** option in the API Configuration section.

4. Clear the **Google Maps API Key** field.

System Configuration Screen, Options Tab

5. Click **Save**.

Viewing School Selection Page with Google Maps Disabled

1. Open OLR as a Parent.

2. Select the School Selection screen. With the option disabled:

    -   The map no longer displays.

    -   Address fields in OLR are not autocompleted.

    -   **Family Home Address** can be autocompleted when the district uses **Address Grid Definitions**.

Online Registration, Students School Selection Screen

Creating Person Notification Codes

You can create a Person Notification Code to identify students with pending registrations in Online Registration. These notifications display on student-specific screens and contain the school name and school year for the pending registration. Clicking **Accept** or **Deny** on the Registration Queue screen removes the notification.
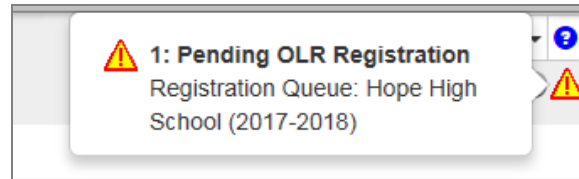
Student Screen

Adding Person Notification Codes

1. Navigate to **Synergy SIS > System > Setup > Person Notification Codes**.
2. Click **Add** in the Notifications section to add a new line.
3. Enter the **Order**, **Short Description**, and **Description**.
4. Select the **Display Icon** to appear next to the notification. A sample image displays in the **Icon** column.

Person Notification Codes Screen

5. Click **Save**.

> See the *Synergy SIS – System Administrator Guide* for more information on creating Person Notification Codes.

Assigning Student Notifications for Pending Registration

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Select the created person notification code created for **Student Notification for Pending Registration** in the Registration Queue section.
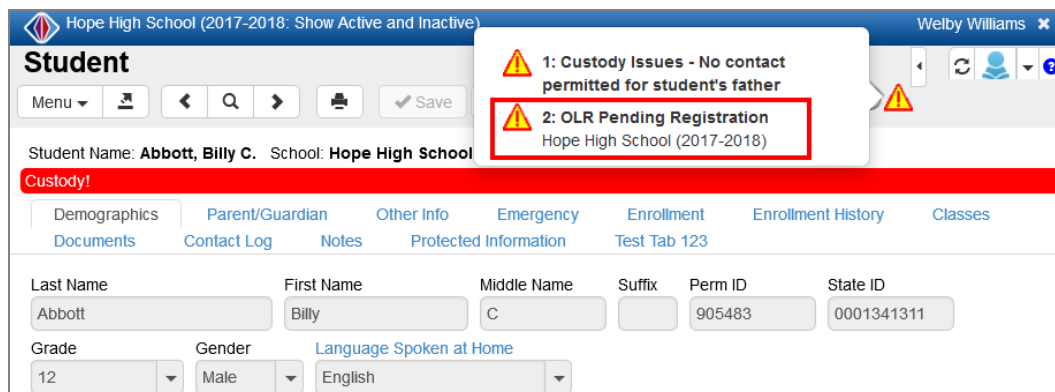
District Setup Screen, System Tab

4. Click **Save**.

The following example displays an OLR Pending Registration notification on the Student screen:

Student Screen

Chapter 3:
District and School Setup

Disabling Links between OLR and ParentVUE

Users can navigate between Online Registration (OLR) and ParentVUE. The links between applications display automatically for districts licensed for OLR that also use ParentVUE. Synergy SIS enables these links by default, but you can disable them.

The **Registration** tab displays on the ParentVUE home screen for parents with enrolled children. Parents automatically log in to OLR when selecting the tab.

- The **Registration** tab is hidden if OLR is not open for any school year.
- If the parent does not have any enrolled children, they automatically redirect to OLR after logging in to ParentVUE so they can enroll a new student.
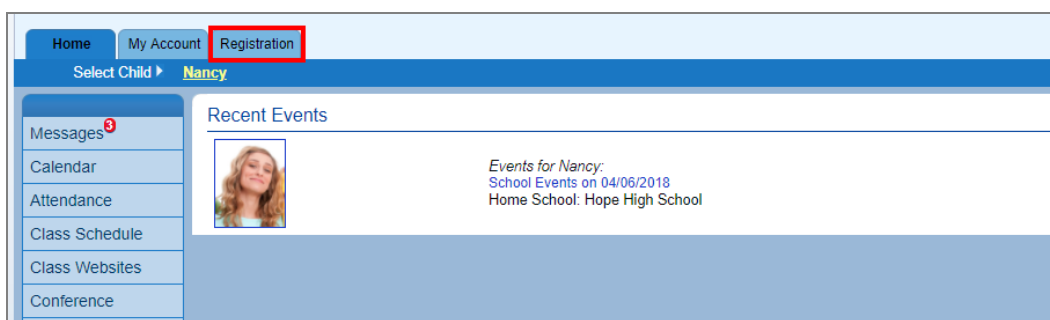
ParentVUE 1.0 Home Screen, Registration Tab

The **ParentVUE** tab displays on the OLR home screen for parents with enrolled children. Parents automatically log in to ParentVUE when selecting the tab. The **ParentVUE** tab does not display in OLR if the parent does not have any enrolled children.
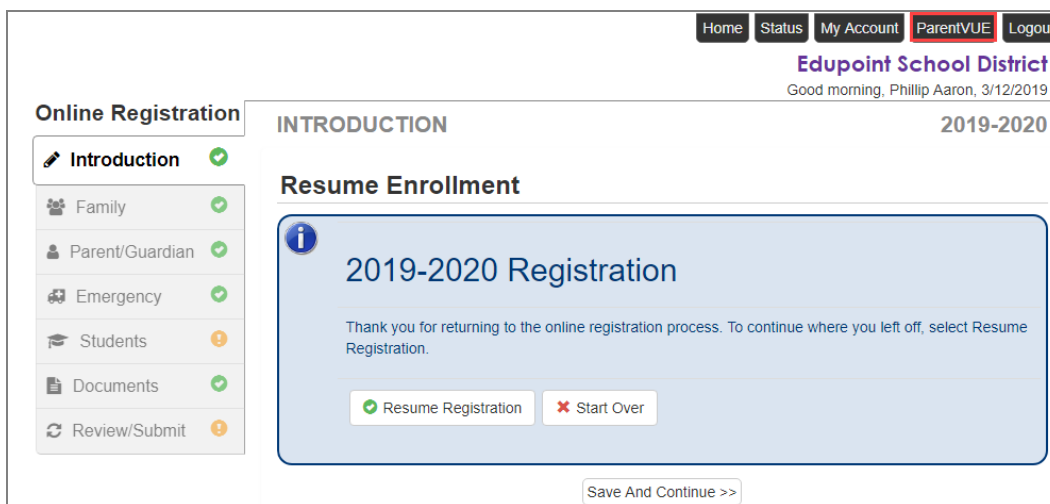
Online Registration Home Screen, ParentVUE Tab

You can hide the tabs that link between OLR and ParentVUE on the District Setup screen.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Select *Yes* for **Hide OLR Link in ParentVUE** in the Online Enrollment Options section to disable the link to OLR from ParentVUE.

> The option defaults to *No* if left blank.

4. Select *Yes* for **Hide the link to PXP from within OLR** to disable the link to ParentVUE from OLR.

> The option defaults to *No* if left blank.

District Setup Screen, System Tab

5. Click **Save**.

Defining Emergency Contact Order

You can define what numbers display in the Order column in the Parent/Guardian, Emergency Contacts, and Emergency Contact Order sections on the Student screen. The order is based on the Emergency Contact Order from Online Registration (OLR).

District Setup

1. Navigate to **Synergy SIS > System > Setup > District Setup**.
2. Select the **System** tab.
3. Select the options in the Emergency Contact and Parent/Guardian Orders section.

> The Order does not change if no option is selected. The numbers are as entered on the Student screen.

- **On Accept, Synchronize Emergency Contact and Parent/Guardian Orders with Emergency Call Order** – The Contact Order for Parent/Guardian and Emergency Contacts change to match the Contact Order entered by the parent in Online Registration. The number in the Order column on the **Parent/Guardian** tab and **Emergency Contacts** tab is the Contact Order entered by the parent in Online Registration.
- **When Synchronizing, Renumber Emergency Contact and Parent/Guardian Orders Beginning with 1** – The Contact Order for Parent/Guardian and Emergency Contacts change to match the Contact Order entered by the parent in Online Registration, but each section starts with the number 1.

> You are required to select the first option for changes to occur.

District Setup Screen, System Tab

4. Click **Save**.

Example 1 – No Option Selected

The administrator does not select an option.

District Setup Screen, System Tab

Parent enters the Emergency Contact Order on the Students Relationships screen.

Online Registration, Students Relationships Screen

The **Call Order** on the **Emergency Contacts** tab of the Student screen displays the order entered by the parent during Online Registration.

Student Screen, Emergency Contacts Tab

The **Order** column does not change on the **Parent/Guardian** tab.

Student Screen, Parent/Guardian Tab

The **Order** column does not change on the **Emergency Contacts** tab.

Student Screen, Emergency Contacts Tab

Example 2 – First Option Selected

The administrator selects the first option.

District Setup Screen, System Tab

Parent enters the Emergency Contact Order on the Students Relationships screen.

Online Registration, Students Relationships Screen

The **Call Order** on the **Emergency Contacts** tab of the Student screen displays the order entered by the parent during Online Registration.

Student Screen, Emergency Contacts Tab

The **Order** on the **Parent/Guardian** tab displays the order entered by the parent during Online Registration.

Student Screen, Parent/Guardian Tab

The **Order** on the **Emergency Contacts** tab displays the order entered by the parent during Online Registration.

Student Screen, Emergency Contacts Tab

Example 3 – First and Second Option Selected

The administrator selects the first and second option.

District Setup Screen, System Tab

Parent enters the Emergency Contact Order on the Students Relationships screen.

Online Registration, Students Relationships Screen

The **Call Order** on the **Emergency Contacts** tab of the Student screen displays the order entered by the parent during Online Registration.

Line	Call Order	Relationship	Name
1	1	Biological Mother	Abbott, Alice
2	2	Step-Father	Abbott, Paul
3	3	Relative	Bethann Lowell
4	4	Relative	Sandee Martin
5	5	Relative	Renee Phillips
6	6	Biological Father	Butler, Bob
7		Self	Abbott, Tanner A.

Student Screen, Emergency Contacts Tab

The **Order** on the **Parent/Guardian** tab changes and starts with the number 1.

✖ ▾	Line	Order	Lives With	Relation	Parent Name	
☐	1	1	☑	Biological Mother	Abbott, Alice	🔗 ✉
☐	2	2	☑	Step-Father	Abbott, Paul	🔗 ✉
☐	3	3	☐	Biological Father	Butler, Bob	🔗 ✉

Student Screen, Parent/Guardian Tab

The **Order** on the **Emergency Contacts** tab changes and starts with the number 1.

✖ ▾	Line	Order	Relationship	Name
▪	1	1	Relative	Bethann Lowell
▪	2	2	Relative	Sandee Martin
▪	3	3	Relative	Renee Phillips

Student Screen, Emergency Contacts Tab

Grade Validation Setup

Select the grade levels or schools to be excluded for Online Registration (OLR) and define the age restrictions for each grade level.

> 📄 This setup affects Student Demographic Validation Options.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **Grade Setup** tab.

3. Deselect the **Available for Online Registration** option for those grades you want to exclude from Online Registration. Any grade level not selected for **Available for Online Registration** no longer forces the parent into Online Registration.

4. Define the age limits in the **Age for Online Registration** column for each grade selected.

   - **Minimum Year** – Enter the minimum age year.
   - **Minimum Month** – Enter the minimum age month.
   - **Maximum Year** – Enter the maximum age year.
   - **Maximum Month** – Enter the maximum age month.

   > 📄 Validation does not occur for a selected grade level that has no age restrictions defined.

5. Click **Save**.

District Setup Screen, Grade Setup Tab

Online Registration

Grade validation validates the **Entering Grade** and **Birth Date** based on the age restrictions set in District Setup and the selected **As Of** date in Online Registration Setup. Validation occurs when selecting the **Entering Grade** on the Demographics screen of Online Registration.

> Synergy SIS pulls the options for **Entering Grade** from the grade levels selected in the Grades section on the District Setup screen.

Invalid Age Message

Online Registration – Demographics Screen

Valid Age Message – Age Restriction Specified

Online Registration – Demographics Screen

Valid Age Message – Age Restriction Not Specified

Online Registration – Demographics Screen

Grade Capacity

Complete the following setup to control the maximum number of students to allow for each grade.

> 📄 Grade Capacity does not limit acceptance. It is a visual tool to show the total enrollment to date for the grade level of the enrolling student.

1. Navigate to **Synergy SIS > System > Setup > School Setup**.
2. Click **Add**.
3. Select a **Grade**.
4. Enter a number for the **Max Grade Capacity**.

School Setup Screen

5. Click **Save**.

Address Setup

District Setup

Options you select when defining address options for enrolling students affect how online registration works.

> See the *Synergy SIS – Student Management Administrator Guide* for more information.

Address Completion and Validation

> You must set up Address Grid Definitions.
>
> - Select *Normal Address Validation* as the **Address Validation Type**.
> - Select **Use Street Ranges Instead of Individual Streets in Grid Definition**.
> - Allow Alternate Schools, if needed.
>
> See the *Synergy SIS – Student Management Administrator Guide* for more information.

Online registration allows for address completion. During the registration process, the address validates after the parent enters the home address and clicks **Save and Continue**. The parent receives the message defined in the Family module and selects **Change Address** or **Logout** if the address is outside of the district boundary.

Online Registration, Family Screen

Require Home Inside of District Boundary

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Select the *Family* **Module** click **Show Detail** in the Non-Student Enrollment Modules section.
4. Select **Require home address to be inside district boundary**.
5. Enter a **Message to display if outside of district**.

> The address validates against the Address Grid Definition in the enrollment year with **Normal Address Validation** and **Require home address to be inside district boundary** selected.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

6. Click **Save**.

Include Additional Schools to School Selection

Allow parents to select more than one school for a grid by adding additional schools to the Address Grid Definition and including *Any School Within District* for the School Selection process in Online Registration.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Select **Enable School Grid Code by Grade Level Override** in the Address Options section.

District Setup Screen, System Tab

> Selecting this option adds the 'Entries in the following grid will override the entries above' section on the Address Grid Definition screen.
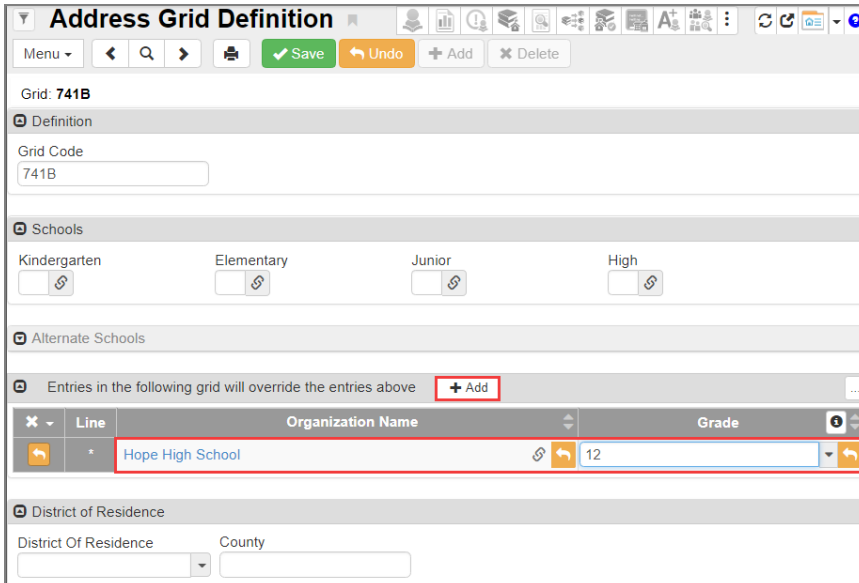>
>
>
> *Address Grid Definition Screen*

Navigate to **Synergy SIS > System > Setup > Address Grid Definition**.

    d.   Click **Add** to add a new line.

    e.   Click 🔗 in **Organization Name** to select the school.

    f.   Select the **Grade** level.

Address Grid Definition Screen

    g.   Add additional schools and grades as desired.

    h.   Click **Save**.

Select the Additional Schools to Allow

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Click **Show Detail** for the *School Selection* **Module**.

    a. Select *Any School within District* for **Schools to allow**.

    b. Click **Save**.

Online Registration Setup, Registration Modules Tab, School Selection Detail

Address Change

You can choose to display an **Effective Date** and **Change Date** on the Student screen when the address changed during reenrollment using Online Registration.

> Synergy SIS updates the **Change Date** on the Student screen only if the change date is required in Online Registration.

Student Screen

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Select **Require address change date when student home address is changed**.

District Setup Screen, System Tab

4. Click **Save**.

No Show Setup

The district can allow a student to register in a different school than the one assigned during the New Year Rollover process using Online Registration. A setup option allows the student to No Show at the school they were assigned during New Year Rollover and enroll in the school they registered at using Online Registration. The student is skipped at the original school during future New Year Rollover processes for the year.

> During the acceptance process, when a student is marked as No Show:
>
> - The No Show Date is the current date if the date is prior to the start of the school calendar.
> - The No Show Date is calculated to one day prior to the start of the school calendar if the date is after the start of the school calendar.

No Show Options for Re-registration

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Make the following selections:

   - **Allow "No Show"** – Select the option.

   - **Require Summer Withdrawal Code/Date for "No Show"** – Select to display the required Default Summer Withdrawal Code on the Online Registration Setup screen, if needed.

   - **Require Withdrawal Reason Code** – Select to display the required Default Summer Withdrawal Reason Code on the Online Registration Setup screen, if needed.

   > A warning displays during the acceptance process if these options are selected and no code is selected on the Online Registration Setup screen for the required fields.

District Setup Screen, System Tab

4. Click **Save**.

Excluding Schools from Online Registration

There a two methods to use when excluding schools from online registration:

- District Setup – Use to exclude or include all schools in the district. For example, to include all schools that were previously set to exclude.
- School Setup – Use to exclude or include a single school or limit grades available for online registration.

Using District Setup

District Setup Screen, System Tab

1. Navigate to **Synergy SIS > System > Setup > District Setup**.
2. Select the **System** tab.
3. Click one of the following options in the Online Enrollment Options section:

   - **Exclude All Schools**

     > Select **Exclude All Schools** to include a small number of schools in online registration. Then set the schools to be included on the School Setup screen.

   - **Include All Schools**

     > Use to set all schools to be included after some were set to be excluded on the School Setup screen.

4. Click **Save**.

Using School Setup

1. Navigate to **Synergy SIS > System > Setup > School Setup**.

2. Select one of the following:

   - Select **Exclude From Online Registration** to exclude the whole school.

     > **Selecting Exclude From Online Registration** hides the School Selection Override section.

   - Select based on grade:

     a. Click **Add** in the School Selection Override section to add a new line.

     b. Select the **Grade Level**.

     c. Select an option to **Exclude or Include**:

        - *Exclude*

        - *Include*

        - *Include only if outside of district boundary*

     d. Enter additional information to display for the school in ParentVUE.

School Setup Screen

3. Click **Save**.

Chapter 4:
Messaging and Document Setup

Email Setup

Online Registration Notifications

Use the Email Content screen to create custom emails for an acceptance, denial, retraction, or application change and to use a custom email that notifies parents/guardians that online registration is available using ParentVUE.

1. Navigate to **Synergy SIS > System > Setup > Email Content**.
2. Click **Add** to open the Email Content (Add) screen.

Email Content Screen

3. Enter the **Content Namespace**.

   - Enter *PXP* for the acceptance, denial, or retraction email.
   - Enter *OLR* for the application change email.

4. Enter the **Content Key**.

   - Enter *Accept* or *Acceptance* for the acceptance email.
   - Enter *Deny* or *Denial* for the denial email.
   - Enter *Retract Reason* for the retraction email.
   - Enter *Application Change* for the application change email.
   - Use a term that specifically identifies this notification for the custom district notification email.

   > **Content Namespace** and **Content Key** are used to identify Email Content on other screens.
   >
   > Synergy SIS supports multiple denial emails. For example, out-of-boundary, not accepting new registrations, requires school with unique programs, and so on.

5. Select the **Default Language**.

6. Select the **Content Type**.

- Select *Online Registration – Accepted* for the acceptance email.
- Select *Online Registration – Denied* for the denial email.
- Select *Online Registration – Retract* for the retraction email.
- Select *Online Registration – Application Change* for the application change email.
- Select *ParentVUE* for the custom district notification email.

Email Content (Add) Screen

7. Click **Save**.

8. Click **Add** in the Content Sections section to open the Email Content Detail screen.

> You can configure multiple languages for each type of email message. The Student's **Home Language** determines the language used for email sent.

Email Content Detail Screen

9. Select the **Language**.

10. Enter the **Email Subject**. Anything similar to the example in the above screen is acceptable.

11. Click **Save**.

12. Select a line and click **Show Detail** to add a message body.

The Message body may be uploaded from either an existing HTML document, or an existing text document. An uploaded HTML document can be edited directly in Synergy SIS, using the built-in HTML editor.

Upload Existing HTML Document

Email Content Screen, Content Sections Detail

1. Click **Attach HTML Document** to upload an existing HTML document.

    - The document must be in an email HTML format, not web page format.
    - Indicate beginning and ending of message with the tags **!!BEGIN!!** and **!!END!!**.
    - The beginning and ending of a section that repeats, such as a table of attendance information, must be marked with **!!REPEAT_BEGIN!!** and **!!REPEAT_END!!**.

2. Click **Browse**.
3. Select the document to upload.
4. Click **Upload**.
5. Click **OK**.

Editing Messages in the HTML Editor

1. Click the drop-down on the right side of the silver bar. The HTML Editor tools display. **!!BEGIN!!...!!END!!** tags are not shown in WYSIWYG (What You See Is What You Get)editor window.
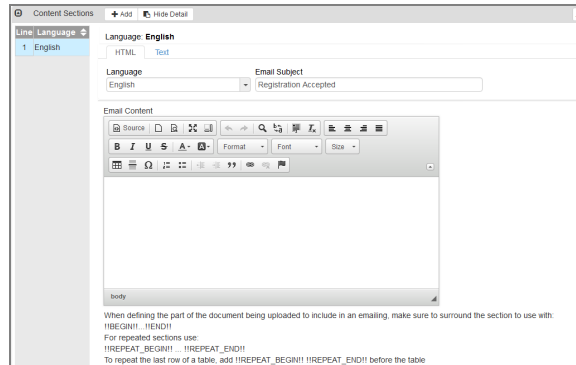
Email Content Screen, Content Sections Detail

2. Edit the Message in HTML Code.

> Click [Source] to toggle between the HTML editor and the WYSIWYG editor.
>
> The following is an example of HTML code for Email Content for an application change email.
> ```
> <p>Hello @PARENT_NAME@,</p>
> <p>The OLR application for student @STUDENT_NAME@ has
> changed.</p>
> <p>!!REPEAT_BEGIN!! !!REPEAT_END!!</p>
> <table border="1" cellpadding="1" cellspacing="1"
> style="width:500px">
> <tbody>
> <tr>
> <td style="text-align: center;">Module</td>
> <td style="text-align: center;">Page</td>
> <td style="text-align: center;">Difference</td>
> </tr>
> <tr>
> <td>@MODULE@</td>
> <td>@PAGE@</td>
> <td>@DETAILED_DESCRIPTION@</td>
> </tr>
> </tbody>
> </table>
> <p>For more info, please contact @SCHOOL_NAME@</p>
> <p><br />
> ```

3. Click **Save** when finished.

Upload Existing Text Document

Email Content Screen, Content Sections Detail, Text Tab

1. Select the **Text** tab.

2. Click **Attach Text Document** to upload existing text document to be sent in text format. The Text Document screen displays.

   - The document must be in text format.

   - Indicate beginning and ending of message with tags **!!BEGIN!!** and **!!END!!**.

   - Beginning and ending of a section that repeats, such as a table of attendance information, must be marked with **!!REPEAT_BEGIN!!** and **!!REPEAT_END!!**.

3. Click **Browse**.

4. Select the document to upload.

5. Click **Upload**.

Add Messages in Multiple Languages

1. Click **Add** in the Content Sections section to open the Email Content Detail screen.

Email Content Screen

2. Select the desired **Language**.

3. Enter the **Email Subject**.

Email Content Detail Screen

4. Click **Save**.

5. Select the line and click **Show Detail** to add a message body.

> Upload the Message body from either an existing HTML document or an existing Text document. An uploaded HTML document can be edited directly in Synergy SIS, using the built-in HTML editor.
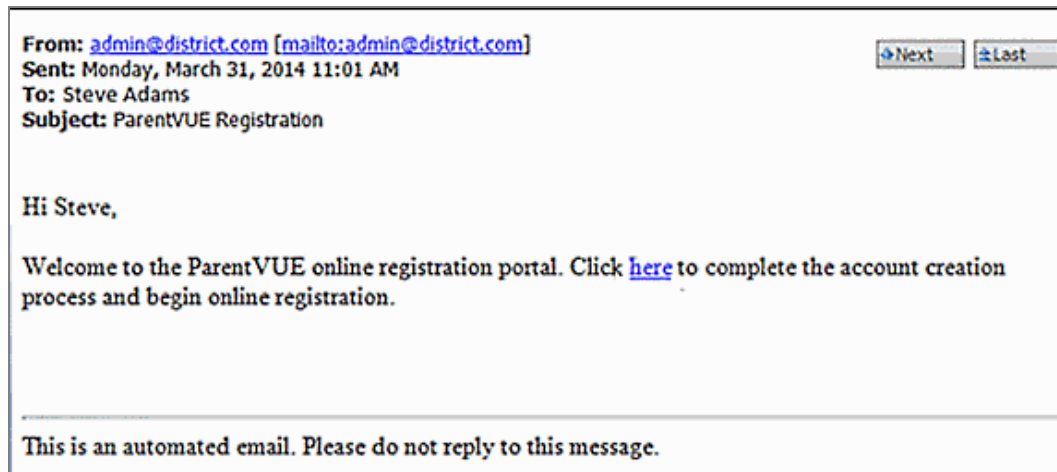>
> Follow the instructions under Upload Existing HTML Document or Upload Existing Text Document to complete the denial notification.

Email Content Screen, Content Sections Detail

New Account Email

The system sends a confirmation message to the parent's email account that contains a link that allows them to complete the account creation process after they submit a new account application. Below is an example of the default email message. The district has the option to customize this message. See Online Registration Notifications to override the default confirmation message.

From: admin@district.com [mailto:admin@district.com]
Sent: Monday, March 31, 2014 11:01 AM
To: Steve Adams
Subject: ParentVUE Registration

Hi Steve,

Welcome to the ParentVUE online registration portal. Click here to complete the account creation process and begin online registration.

This is an automated email. Please do not reply to this message.

Account Creation Confirmation Message Example

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Select a new message from **Email Content for Self Registration Notification**.
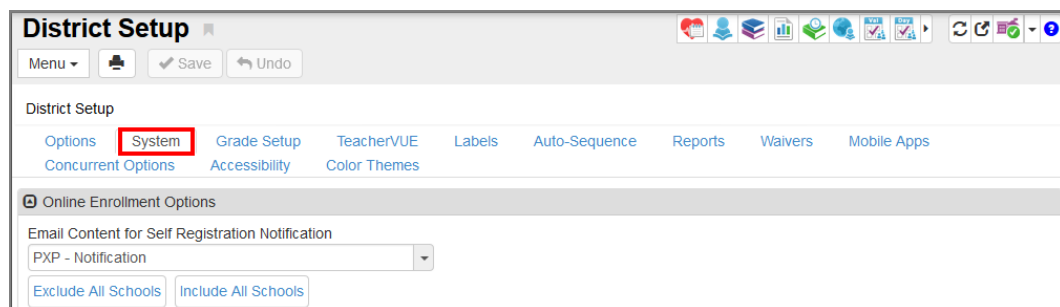
District Setup Screen, System Tab

4. Click **Save**.

Emptying the Email Queue

Records of the changes are automatically added to a database table when changes are made to OLR applications in the Registration Queue. Synergy SIS can send these past notifications after you enable the option to send email application change notifications to parents in District Setup. The **Empty Email Queue** option on the District Setup screen deletes all prior application change notifications in the database.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Click **Empty Email Queue**.

District Setup Screen, System Tab

4. Click **Yes** in the Confirm window.

Confirm Window

Synergy SIS displays a message indicating the number of records deleted from the email queue.

Deletion Message

Application Change Email Settings

Synergy SIS can send email notifications automatically to parent/guardians when changes are made to the Online Registration application in the Registration Queue.

> Click **Empty Email Queue** before entering content in the Email Parent Upon Application Change section and clicking **Save** or **Restart Process**. This prevents Synergy SIS from sending past notification to parents. See Emptying the Email Queue for more information.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **System** tab.

3. Enter the following required values in the Email Parent Upon Application Change section:

   - **Email Content** – Select *Application Change* from the list.
   - **Process Run Interval** – The number of minutes between sending email notifications.
   - **Minutes to Wait After the Last Change** – The number of minutes to wait after the last change to a specific application before creating another email notification.
   - **Email From Address** – The email address that displays in the **From** field of the email notification.

4. Enter the **Read Receipt Email Address**, if needed. The is the email address that a read receipt email is sent to if the recipient of the email notification answers Yes to 'Do you want to send a receipt?'.

> ⚠ Clearing the value from any of the required fields above disables emailing of OLR application changes to parent/guardians.

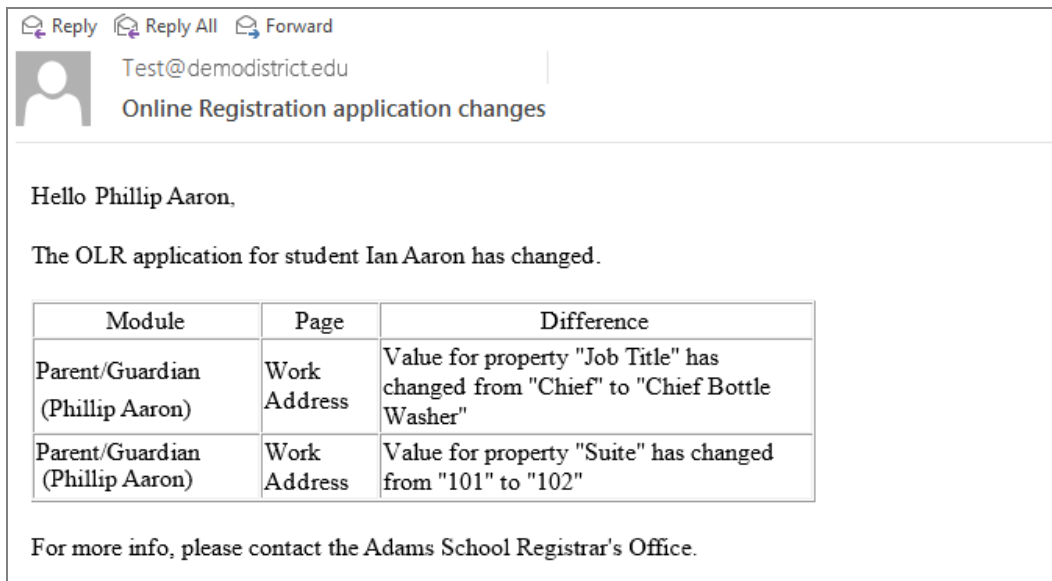*District Setup Screen, System Tab*

5. Click **Save** to start the clock for the Process Run Interval.

> Click **Restart Process** at any time to restart the Process Run Interval clock.

Sending Application Change Notifications

Synergy SIS automatically sends the email to the parent/guardian according to the schedule defined in the District Setup.

| Module	Page	Difference
Parent/Guardian (Phillip Aaron)	Work Address	Value for property "Job Title" has changed from "Chief" to "Chief Bottle Washer"
Parent/Guardian (Phillip Aaron)	Work Address	Value for property "Suite" has changed from "101" to "102"

Parent Email Notification

A request for permission to send a read receipt displays when the parent/guardian closes the email.
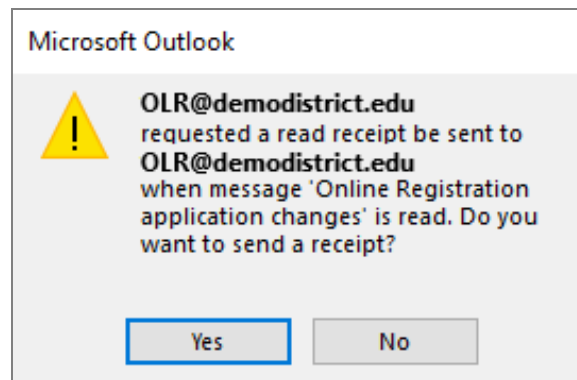
Read Receipt Request

The receipt email sends to the **Read Receipt Email Address** specified in District Setup when the parent/guardian clicks **Yes**.
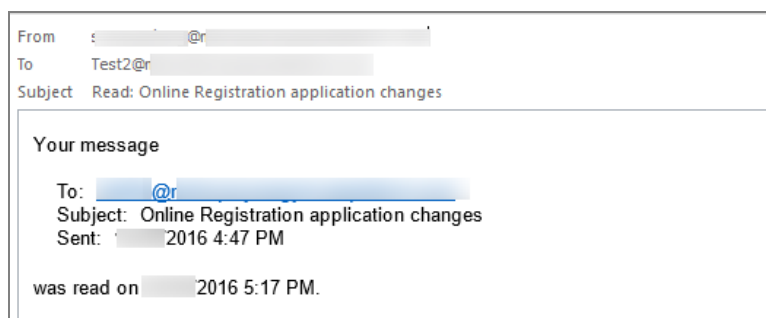
Read Receipt Email

Synergy SIS removes the OLR application changes logged in the Email Queue when sending the email.

Registration Queue Screen, Registrations Waiting To Be Processed Detail, Email Queue Tab

Emailing Notification of Missing Parent Email Address

Synergy SIS sends application change notifications to parents/guardians using the first email address found in Synergy SIS in the order shown below. Synergy SIS looks for one in the next field, and so on if there is no email address in the first field.

1. **Parent > Parent > Demographics** tab **> Email** field
2. **Parent > Parent > ParentVUE** tab **> Email 1** field
3. **Parent > Parent > ParentVUE** tab **> Email 2** field
4. **Parent > Parent > ParentVUE** tab **> Email 3** field
5. **Parent > Parent > ParentVUE** tab **> Email 4** field
6. **Parent > Parent > ParentVUE** tab **> Email 5** field

Synergy SIS sends a notification email to the address in the **Read Receipt Email Address** field in District Setup if no email address is found for the parent/guardian in any of the six locations.

Email Notification

Emailing Notification of Invalid Parent Email Address

Synergy SIS sends an email to the **Read Receipt Email Address** indicating that the email address attempted is invalid if the first email address found is invalid. Synergy SIS does not attempt to send an email to a different email address if the first one it sends to is invalid.
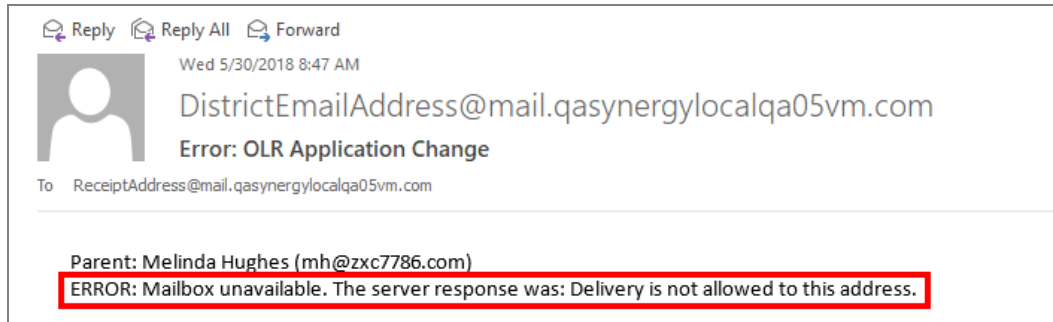
Email Notification

Sample Email Content

Certain email tokens are only available for specific message types.

Message Type	Sample Message Content

K12.OEN/Application Accepted	*Dear @PARENT_NAME@,*
	
	Your student @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ has been successfully enrolled in @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year. Please contact the school for further information: @SCHOOL_NAME@ at @SCHOOL_PHONE@.
	
	NOTE: The following email tokens are available for the Application Accepted message:
	
	`@SCHOOL_NAME@`
	`@SCHOOL_YEAR@`
	`@SCHOOL_PHONE@`
	`@SCHOOL_PHONE2@`
	`@SCHOOL_EMAIL@`
	`@STUDENT_NAME@`
	`@STUDENT_FIRSTNAME@`
	`@STUDENT_LASTNAME@`
	`@STUDENT_PRONOUN@`
	`@PARENT_NAME@`
	`@URL@`

Message Type	Sample Message Content

K12.OEN/Application Denied	*Dear @PARENT_NAME@,*
	
	We are unable to enroll @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ in @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year. The application has been passed to the next preferred school, @NEXT_SCHOOL_NAME@. Please contact the school for further information: @SCHOOL_NAME@ at @SCHOOL_PHONE@. You may review your application online at @URL@.
	
	NOTE: The following email tokens are available for the Application Denied message:
	
	`@SCHOOL_NAME@`
	`@SCHOOL_YEAR@`
	`@SCHOOL_PHONE@`
	`@SCHOOL_PHONE2@`
	`@SCHOOL_EMAIL@`
	`@STUDENT_NAME@`
	`@STUDENT_FIRSTNAME@`
	`@STUDENT_LASTNAME@`
	`@STUDENT_PRONOUN@`
	`@PARENT_NAME@`
	`@URL@`
	`@NEXT_SCHOOL_NAME@`

K12.OEN/Capacity Exceeded	*Dear @PARENT_NAME@,* *Due to size constraints we are not able to enroll @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ at @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year. You may review your application online at @URL@* *If you have any questions please call @SCHOOL_NAME@ at @SCHOOL_PHONE@.*
K12.OEN/Discipline	*Dear @PARENT_NAME,* *Due to the disciplinary action indicated on your registration, we are not able to enroll @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ at @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year. You may review your application online at @URL@* *If you have any questions please call @SCHOOL_NAME@ at @SCHOOL_PHONE@.*
K12.OEN/Out of Boundary	*Dear @PARENT_NAME@,* *We are unable to enroll @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ in @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year. The address provided is outside of our school boundary. You may review your application online at @URL@* *If you have any questions please call @SCHOOL_NAME@ at @SCHOOL_PHONE@.*

Message Type	Sample Message Content

K12.OEN/Retract	*Dear @PARENT_NAME@,*
	
	The registration for @STUDENT_FIRSTNAME@ @STUDENT_LASTNAME@ in @SCHOOL_NAME@ for the @SCHOOL_YEAR@ school year has been reopened for review by @RETRACT_SCHOOL_NAME@. Please contact the school for further information: @SCHOOL_NAME@ at @SCHOOL_PHONE@. You may review your application online at @URL@
	
	NOTE: The following email tokens are available for the Retract message:
	
	`@SCHOOL_NAME@`
	`@SCHOOL_YEAR@`
	`@SCHOOL_PHONE@`
	`@SCHOOL_PHONE2@`
	`@SCHOOL_EMAIL@`
	`@STUDENT_NAME@`
	`@STUDENT_FIRSTNAME@`
	`@STUDENT_LASTNAME@`
	`@STUDENT_PRONOUN@`
	`@PARENT_NAME@`
	`@URL@`
	`@CURRENT_SCHOOL_NAME@`
	`@RETRACT_SCHOOL_NAME@`

K12.OEN/Submit	*Dear @PARENT_NAME@,*
	
	The registration(s) for @STUDENT_NAMES@ have been successfully submitted for review. Please contact your student's school if you have any questions regarding the application review and approval process.
	
	NOTE: The following email tokens are available for the Submit message:
	
	`@PARENT_NAME@`
	`@STUDENT_NAMES@`

Mail Merge Documents

You can define and use a mail merge document with Online Registration. This allows the Parent/Guardian to print a mail merge document containing registration information directly from the Online Registration Review/Submit screen, sign it, and submit it to the district if necessary.

Creating a Mail Merge Definition

> See the Address Options chapter in the *Synergy SIS – Mail Merge 2.0 Guide* for more information.

1. Navigate to **Synergy SIS > System > Setup > Mail Merge District Definition**.
2. Click **Add** to open the Mail Merge District Definition (Add) window.
3. Enter the **Name**, **Type**, **Default Language**, and **Mail Merge Version**.

Mail Merge District Definition (Add) Screen
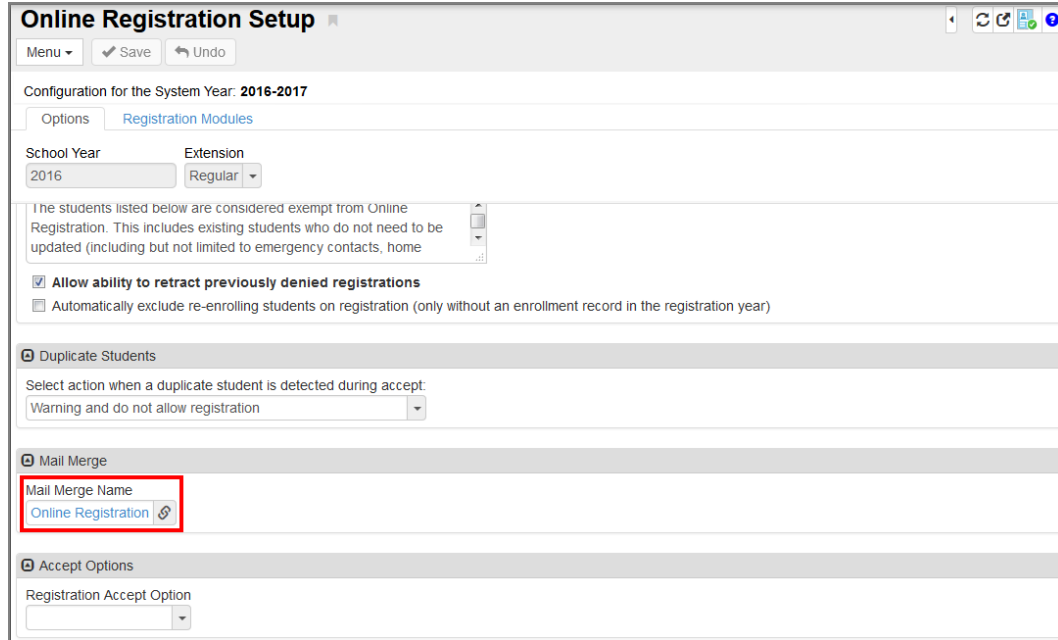
4. Click **Save**.
5. Click **Add** in the Mail Merge Documents section to add a new line.
6. Select the mail merge document created for Online Registration.
7. Click **OK** on the Upload Successful message.
8. Select the **Language** for the document.

Mail Merge District Definition Screen

9. Click **Save**.

Linking a Mail Merge Document

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Click [icon] in the **Mail Merge Name** field and select the created mail merge definition.

Online Registration Setup Screen

3. Click **Save**.

Online Registration Review/Submit

Clicking **Review** on the Review/Submit screen displays the registration form for review. Clicking **Print** on the registration form prints the registration in the mail merge format selected in the Online Registration Setup. The **Print** option prints the review document in its original format if no mail merge definition is selected.

Online Registration, Review/Submit Screen

School Selection Message Setup

You can customize the messages that display on the OLR School Selection screen.

OLR Not Allowed for Students Inside School Boundary

You can create a message that indicates OLR is not available for students with a home address inside the school's boundary.

1. Navigate to **Synergy SIS > System > Setup > Property Override**.

2. Navigate to **K12 > K12.OnlineEnrollmentInfo > K12.OnlineEnrollmentInfo.Setup > OENYearStudentModuleSchoolSelection > Message_ OLRNotAllowedForStuInSchBoundary**.

3. Enter the desired message in **Label**. For example, *OLR not allowed – home within school boundary.*

Property Override Screen

4. Click **Save**. The message displays at the top of the School Selection screen and **School Selection** list does not include the school as an option in OLR.

Online Registration – School Selection Screen

OLR Not Allowed for Previous Attendance Reason Code

This message displays if a student is enrolled with an **Attendance Reason Code** (Reason for Attendance) selected in the School Selection module's Reenroll Options section.

1. Navigate to **Synergy SIS > System > Setup > Property Override**.

2. Navigate to **K12 > K12.OnlineEnrollmentInfo > K12.OnlineEnrollmentInfo.Setup > OENYearStudentModuleSchoolSelection > Message_ OLRNotAllowedForPrevAttReasCode**.

3. Enter the desired message in the **Label** field. (For example,. *OLR is not allowed for this student at [NAME] because of the Attendance Reason Code. Synergy SIS automatically reenrolls the student at this school unless you change enrollment to a different school.*)

Property Override Screen

4. Click **Save**. The message displays at the top of the School Selection screen and the **School Selection** list does not include the school as an option in OLR.

Online Registration – School Selection Screen

Estimated Mileage

You can customize the mileage message through Property Override.

1. Navigate to **Synergy SIS > System > Setup > Property Override**.

2. Navigate to **K12 > K12.OnlineEnrollmentInfo > K12.OnlineEnrollmentInfoSetup > OENYearStudentModuleSchoolSelection > Message_EstimatedMileage**.

3. Enter your customized message in the **Label** field in the Override section.

4. Click **Save**.

Property Override Screen

The customized mileage message displays on the School Selection screen in OLR.

Online Registration – School Selection Screen

Translation Setup

You can provide translated policy documents based on the preferred language that the user selects within OLR. You can also translate text on the OLR screen, including field names, buttons, and drop-down fields.

> See the *Synergy SIS – System Administrator Guide* for more information on creating translations.

1. Navigate to **Synergy SIS > System > Setup > Translation**.
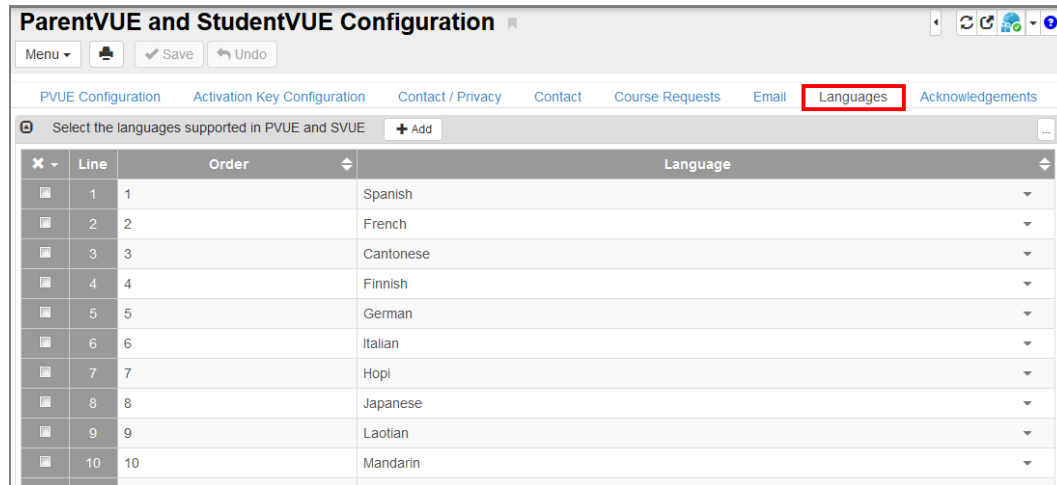   The following example displays setup for the Spanish translation of the Family module screens.

Translation Screen, Views Tab

> You must manually translate messages associated with some OLR screens and fields. The text of the message displays in OLR in the language entered in Online Registration Setup no matter what language you select in OLR. Therefore, Edupoint recommends entering the message in both English and Spanish if parents use OLR in Spanish. See School Selection Message Setup for more information.

Enabling Other Languages in OLR

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Select the **Languages** tab.

ParentVUE And StudentVUE Configuration Screen, Languages Tab

3. Click **Add**.

4. Select the **Language** users can select for OLR.

5. Click **Save**.

Creating Document Translations

You can save the text of an OLR Policy in multiple documents in a different language on the ParentVUE and StudentVUE Configuration screen.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Select the **Acknowledgements** tab.

3. Select an existing acknowledgement in the Acknowledgements section or add a new acknowledgement.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab

4. Select an acknowledgement and click **Show Detail**.

5. Click **Add** in Other Languages.

6. Upload the document written in another language.

7. Select the **Language**.

> You must create a separate document for each translation. You can translate documents using Google Translate or some other translation tool.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab, Acknowledgements Detail

8. Click **Save**.

Users can click **View** on the Policies screen to see the policy document in their preferred language.

> You must enable the Policy module in Online Registration Setup to allow users to view policy documents.

Online Registration, Policies Screen

Chapter 5:
OLR Setup Options

Defining Custom Condition Library

You can define, store, locate, and use conditions in Online Registration (OLR) using the OLR Condition screen or in the Student-Specific Enrollment Modules on the Online Registration Setup screen.

You use OLR conditions to customize the content the parent sees during registration. Following are a few examples to explain how conditions can be used:

- Display a page with questions related to a sport. For example, show a page with questions related to football if the student is interested in football.
- Display a module based on information in Synergy SIS. For example, display a module with military if the parent has a military status in Synergy SIS.
- Display different Demographics questions based on the student being registered. For example, show a page with elementary school information if the student is registering for elementary school.
- Ask the parent to upload different documents based on a condition. For example, ask for a birth certificate if the student is registering for school for the first time.

> Conditions created within OLR for modules and pages automatically display on the OLR Condition screen.
>
> Focus to the school year that affects the enrollment options for Online Registration Setup.

1. Navigate to **Synergy SIS > Online Registration > Setup > OLR Condition**.
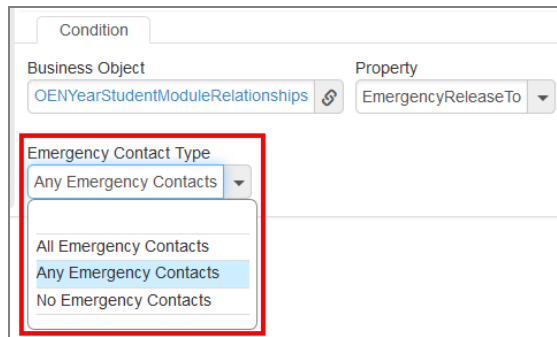
OLR Condition Screen

2. Click **Add** to open the OLR Condition (Add) screen.

OLR Condition (Add) Screen

3. Enter a **Name** for the condition.

4. Enter a **Description**

5. Click **Save** to display additional fields.

6. Perform the following in the Conditions section to define a new condition:

   a. Click **All are True** in the Conditions section.

   b. Change the **Type**, if needed.

      - Select *All are True* for an AND condition.

      - Select *Any Are True* for an OR condition.

   c. Select an option in the **Actions** menu to add additional condition info.

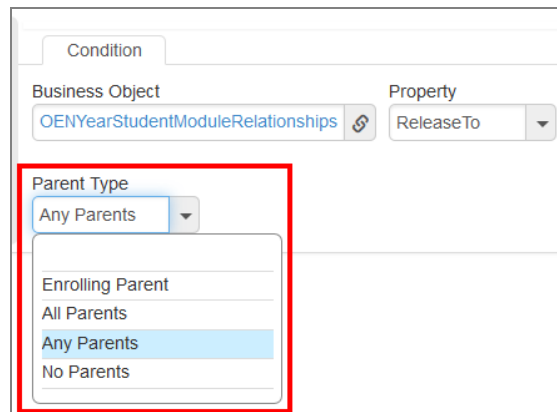   - *Add Container to…* – Adds an *All are True/Any are True* option to the conditions tree

- *Add Property Condition to…* – Adds a property condition to the Conditions tree. For example, only students graduating in a certain class year.

> Additional options display when selecting Parents or Emergency Contacts for the **Business Object** of a Property Condition. These additional options allow you to define the **Emergency Contact Type** and **Parent Type**.
>
>
>
> *Property Condition Screen*
>
>
>
> *Property Condition Screen*

- *Add Special Condition to...* – Adds a condition for *Address Changed* or *Immunization Changed* as the **Special Condition Type**

- *Add Enrolling Status Condition to…* – Adds a condition for *New*, *Reenrolling*, or *Returning* students to the Conditions tree

d. Click **Simplify Conditions** after entering all your conditions. Selecting this option organizes the conditions so that you can easily read and verify the conditions set for the custom document.
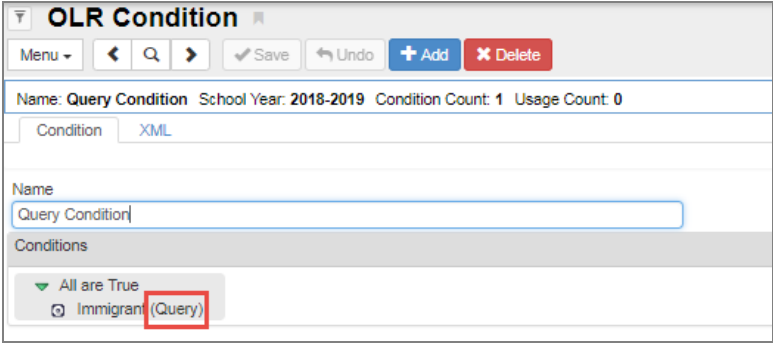

OLR Condition Screen

7. Click **Save**. The **Conditions XML** tab displays the XML for the conditions. You can copy these conditions and use them in the **Conditions XML** tab for other documents.

OLR Condition Screen, XML Tab

Using Synergy SIS Query to Create a Condition

> When using the Query Condition option, the current data in the Synergy SIS database is referenced. These conditions include (Query) in the name in the Conditions tree.
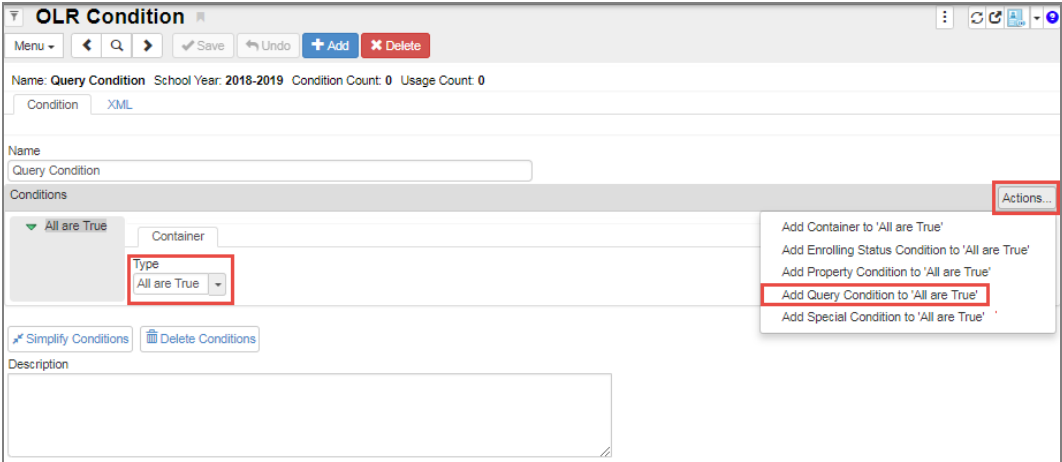>
>
>
> *OLR Condition Screen*
>
> When using the other OLR condition types, the current registration data in OLR is referenced.

1. Navigate to **Synergy SIS > Online Registration > Setup > OLR Condition**.
2. Click **Add** to create a new condition.
3. Enter the **Name**.
4. Click **Save**.
5. Select **All are True** in the Conditions tree.
6. Change the **Type**, if needed.
   - Select *All are True* for an AND condition.
   - Select *Any are True* for an OR condition.
7. Select *Add Query Condition to*... from **Actions...**.

OLR Condition Screen

8. Enter the **Name** of the query in the Query Condition window.

9. Copy and paste an existing Synergy SIS query into **Query** or click **Query Designer** to build a new condition in the Query (Designer) window.

Query Condition Builder

Query (Designer) Window

See the *Synergy SIS – Query and Reporting Guide* for information on *Defining the Content*.

The query must contain a Student data object so the correct student can be referenced in the database.
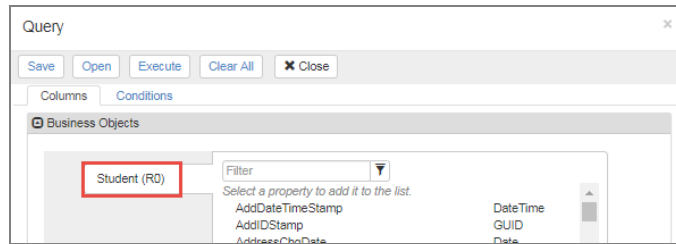
Query (Designer) Window

Enter a Parameter **Name** from the listed OLR Parameter Tokens to insert tokens into the query if you want to evaluate the students for current OLR registration year. The Query checks all years if you do not use one of these parameters. The parameters tokens are case sensitive.

- *SchoolYear* – Use to search for a specific year (for example, 2018).

- *YearExtension* – Use to search for an extension (for example, Regular).

- *YearGU* – Use to search for a specific year and extension (for example, 2018 Regular).
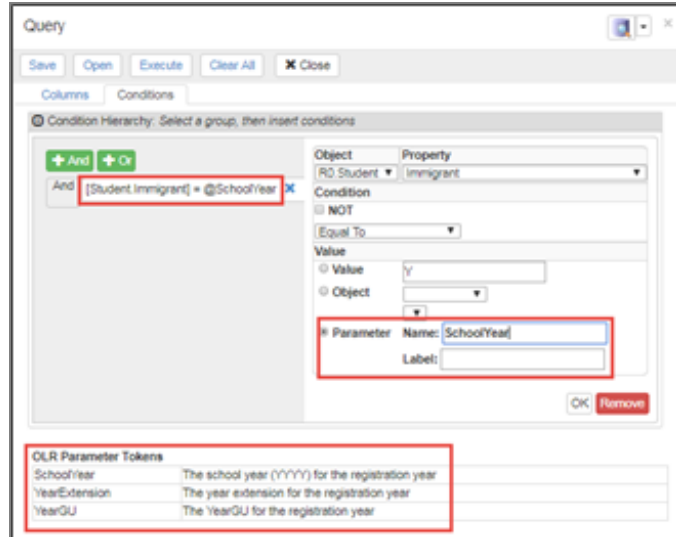
Query (Designer) Window

10. Save the query.

11. Click **Validate**.

Query Condition Screen

> The tokens display if the query is used.

Query Condition Screen

3. Click **Save**. The Synergy SIS query displays as a condition.

OLR Condition Screen

Enabling Online Registration

⚠ Do not select **Registration Enabled** until all of the information is completed on both tabs of the Online Registration Setup screen.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

Online Registration Setup Screen

2. Select **Registration Enabled**.

3. Click **Save**.

⚠ The option automatically disables and must be selected again if you make any registration changes that result in an error inside Synergy SIS after selecting **Registration Enabled**.

Online Registration Setup

The Online Registration Setup screen contains the configuration options for Online Registration (OLR) enrollment and messages.

> ⚠️ Online Registration Setup is district-wide.
>
> Select a user group for enrollment management.
>
> Online Registration Setup is year-specific. Focus to the school year that the enrollment options affect. This is typically the next school year after the current year.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

Online Registration Setup Screen

2. Ensure the appropriate **School Year** and **Extension** (Focus year and extension type) display.

3. Enter the following in the Status section:

> ⚠️ Do not select **Registration Enabled** until all of the information is completed on both tabs of the Online Registration Setup screen.

- **Registration Open Date** – The first available date of registration. Online Registration is not available prior to this date. Synergy SIS requires this date to enable registration.

- **Registration Close Date** – The last date available to start a new registration. Synergy SIS requires this date to enable registration.

- **Final Submit By Date** – The last available date to submit a started registration. Synergy SIS applies the **Registration Close Date** as the **Final Submit By Date** if you leave this field blank.

- **Force Registration** – Forces ParentVUE users to complete online registration by a *Login Count* or *Date*. After meeting this limit, users are redirected to the Online Registration screen until an application for approval is submitted.

  - The **Login Threshold** field displays after selecting *Login Count*. Enter a numeric value.

  - The **Date Threshold** field displays after selecting *Date*. Enter the date.
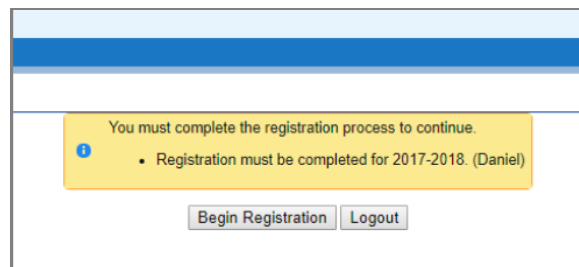
The following image displays the warning message when parents approach the force registration threshold. Clicking **Begin Registration** opens OLR and clicking **Remind Me Later** continues the parent to ParentVUE.

Online Enrollment

Online Registration is now open. Please complete the registration process.

- Registration must be completed for 2017-2018. (Daniel)

Begin Registration | Remind Me Later
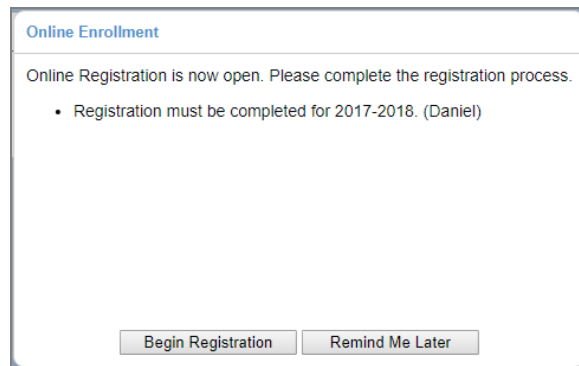
ParentVUE 1.0 Screen

The following image displays the redirect message when parents meet the force registration threshold. Clicking **Begin Registration** opens OLR and clicking **Logout** closes ParentVUE.

You must complete the registration process to continue.

- Registration must be completed for 2017-2018. (Daniel)

Begin Registration | Logout

ParentVUE 1.0 Screen

4. Select **Verification Process Enabled** to verify reenrollment for students.

See <u>Verifying Reenrollment</u> for more information.

5. Select the Default No Show Options if you enabled specific options in District Setup:

Online Registration Setup Screen

- **Default Summer Withdrawal Code** – Required if **Require Summer Withdrawal Code/Date for "No Show"** is selected on the District Setup screen or if using the Verify Reenrollment process.

- **Default Summer Withdrawal Reason Code** – Required if **Require Withdrawal Reason Code** is selected on District Setup screen.

6. Complete the Student Summary section:

Online Registration Setup Screen

- Deselect the **Enable Student Summary** option to not display the students related to enrolling parents on the Student Summary screen on the Introduction page of Online Registration (OLR). This option is enabled by default.

- Enter text in the **Student Summary Message** and the **Student Summary No Students Message** fields.

  - The **Student Summary Message** displays for parents with students listed in the summary.

  - The **Student Summary No Students Message** displays for parents with no students listed in the summary.

The Student Summary message is included on the OLR Introduction page prior to the Signature. This page is read-only.

Online Registration, Introduction Screen

You can translate the Student Summary fields and messages through Translation.

7. Enter the messages that display in the parent portal during various stages of the registration in the Messages shown to parent/guardian during various stages of registration section.

Online Registration Setup Screen

- **Message Online Registration Introduction**

  Example:

  Thank you for using the Edupoint School District online registration portal. You will need to complete all of the required information throughout the information entry process in order for the enrollment to be processed. The registration process is self-guided and informs you of any missing or incorrect information.

- **Message Online Registration Successful Completion**

  Example:

  Thank you for completing and submitting your registration online. Our site staff will review the registration and update the status during the review process.

- **Message Online Registration Incomplete Enrollment**

  Example:

  The student information entered must be reviewed.

- **Message shown when registration is not enabled**

  Example:

  The registration portal is not currently available. Please check back later.

- **Show the OLR enabled schools page during introduction** – Selecting this option results in the following:

  > ⚠️ You must first identify the schools eligible for online enrollment for the School Selection module on the **Registration Modules** tab for this feature to work.

  - Displays the schools in the School Category Include for Online Registration

  - Identifies the schools in the School Category Only Allow Students From Inside School Boundary with the Restrictions message: 'Must live within school boundary.'

  - Identifies the schools in the School Category OLR Not Allowed for Students Inside School Boundary with the Restrictions message: 'Must live outside school boundary for Online Registration.'

Online Registration – Introduction Screen

- **Message shown when OLR enabled school list page is shown**

  Example:

  Schools open for online enrollment

8. Do the following in the Enrollment Management section:

   a. Select the appropriate **User group that will be notified and control student enrollment**. This user group:

      - Is notified of OLR tasks by emails and in the task bar

      - Has the authority to approve or deny student enrollment in their assigned school

b. Select **Allow Registration Queue to override the school to receive the registration request if denying the enrollment request, and there are no additional requested schools** to forward a denied student's registration to another school in the district.

c. Select *Allow new enrollments and re-enrollments* (Default setting), *Do not allow new enrollments*, or *Only allow new enrollments* as the **Enrollment Options**.

d. Select the **Reenroll Filter**:

- *Only allow one online registration per school and year* – Restricts online registration of a student to only once per school and year. If a registration for the student already exists in OLR at the current school, parents can only use OLR again in the same year if the student transfers to a different school.

- *Only allow one online registration per year* – Excludes the student from reenrollment for the same school year

- *Unlimited (default)* – Allows parents to reenroll the student any number of times to any of the schools in the district defined in Online Registration Setup

e. Enter a **Message displayed above list of enrolling students**.

f. Enter a **Message displayed above list of non-enrolling students**.

g. Select **Allow ability to retract previously denied registrations**, if needed. See Retracting a Denied Registration and Email Content Notifications.

Online Registration Setup Screen

h. Select **Automatically exclude re-enrolling students on registration (only without an enrollment record in the registration year)**, if needed to determine how OLR handles inactive, no-showed, or graduated students:

- *Exclude students that are not active in the OLR year allow parent to include students* – Any students that are re-enrolling and have no enrollment record in the registration year display in the Students to exclude section in OLR. Parents can **View** or **Include** these students.

Online Registration, Students Screen

- *Exclude students that are not active in the OLR year do not allow parent to include the student* – Inactive students display in the Students to exclude section. Parents can only **View** these students.

- *Show all active and inactive students in the included grid (default)* – All students display in the Students to enroll section, except graduated or aged-out students. These students display in the Students to exclude section. Parents can **View** or **Include** graduated or aged-out students.

> You can define the criteria for Graduated and Aged-out students on the **Grade Setup** tab at **Synergy SIS > System > Setup > District Setup**. See Grade Validation Setup for more information.

i. Select an option from **Select action when a duplicate student is detected during accept:** to determine what Actions are available to all students on the Registration Queue screen in the Duplicate Students section.

> The option only checks the student being processed during the Accept process.

Duplicate Students

Select action when a duplicate student is detected during accept:

No warning and allow registration

No warning and allow registration
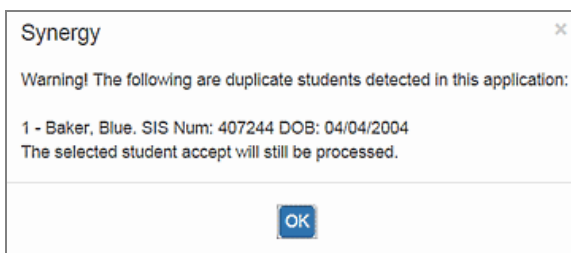Warning and allow registration
Warning and do not allow registration

Online Registration Setup Screen

- *No warning and allow registration* – Available Actions for all students in the Registration Queue include: *Review*, *Find*, *Accept*, and *Deny*. Select to have no warning display during Accept. Synergy SIS enrolls students with duplicates.
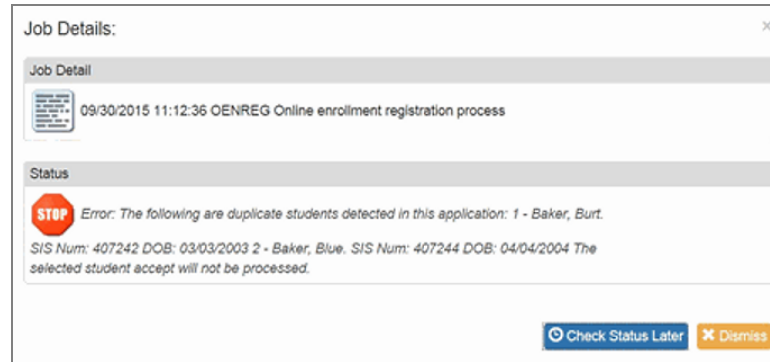

Synergy   ×

407245 Baker, Benjamin B. has been succesfully created.

OK
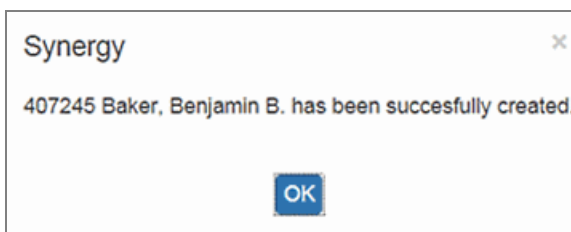
Synergy Window

- *Warning and allow registration* – Available Actions for all students in the Registration Queue include: *Review*, *Find*, and *Deny*. Select to have a warning display for each duplicate student registered and accepted for enrollment. This warning informs of possible duplication of students and allows the student enrollment. This is the default option.

Synergy   ×

Warning! The following are duplicate students detected in this application:

1 - Baker, Blue. SIS Num: 407244 DOB: 04/04/2004
The selected student accept will still be processed.

OK

Synergy Window

- *Warning and do not allow registration* – Available Actions for all students in the Registration Queue include: *Review*, *Find*, and *Deny*. Select to have a warning display for each duplicate student registered. Synergy SIS does not permit enrollment.

Job Details Window

9. Click the link for **Mail Merge Name** to link a Mail Merge document with online registration.

> See Mail Merge Documents for more information.

10. Deselect **Require Review Before Submit**, if necessary. Synergy SIS enables this by default so that parents must review all information in their application before submitting the registration.

> The Review/Submit screen displays only **Review** with **Require Review Before Submit** enabled. This forces the enrolling parent to review the registration prior to submission.
>
> The Review/Submit screen displays only **Review** with **Require Review Before Submit** enabled and **Verification Process Enabled**.
>
> After reviewing, parents must select **I have reviewed all registration data and verified that it is correct** at the bottom of the review screen in order to display **Submit**.
>
>
>
> *Online Registration Review/Submit Screen*

11. Enter the **Registration Accept Option**.

- *Clear settings after accept* – The **Enter Date**, **Enter Code**, and **FTE** fields clear, requiring the user to input these values for each Accept action in the Registration Queue and when using the **Find** option.

- *Default to first day of school and default enter code and FTE* – The **Enter Date** defaults to the first school day in the focus school year calendar. Selecting this option displays the **Default Enter Code** and **Default FTE** options.
- *Remember settings by user (default)* – This option saves the Accepted Enrollment Options set by each user. The **Enter Date**, **Enter Code**, and **FTE** fields remain the same as set by each user.

Online Registration Setup Screen

12. Click **Save**.

Setting Up Auto-Accept

The auto-accept feature allows you to process registrations parents submit. The **Module Tree** tab allows you to select the modules for auto-accept and the modules that need to be processed manually. You can also:

- Define the changes for auto-accept
- Define the changes that must be denied for each module or page
- Access the options for each module or page
- Access the Property Override read-only options
- View the properties on each OLR page
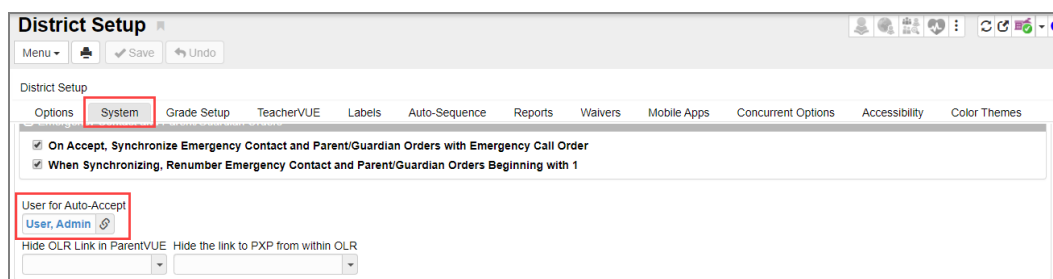- Drag and drop modules and pages to change the display order

Online Registration Setup Screen, Module Tree Tab

Selecting the User for Auto-Accept

> You must select a user in **User for Auto-Accept** for the auto-accept feature to work.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.

2. Select the **Systems** tab.

3. Click ⬡ in **User for Auto-Accept** to select the Synergy SIS user's name that displays as having processed the registration.

District Setup Screen, System Tab

> The user selected must have the rights to update the OLR year and OLR schools. If the user does not have the rights, auto-accept does not work and the reason displays in **Notes** on the Registration Queue screen.

Registration Queue Screen, Registrations Waiting To Be Processed Detail

2. Click **Save**. The registrations processed using auto-accept display as processed by the selected user on the Job Queue Admin Viewer window.

Auto-Accept or Deny Changes

> Online Registration Setup is year-specific. Focus to the school year that the enrollment options affect.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

Online Registration Setup Screen

2. Select the **Enable Auto Accept** option to enable auto-accept for re-enrolling students. Additional fields display when this option is selected.

3. Deselect **Allow Auto Accept For Returning Students** to disable auto-accept for returning students, if needed.

> This option is selected by default.

4. Deselect **Allow Auto Accept For New Students** to disable auto-accept for new students, if needed.

> This option is selected by default.

5. Select the default enter code for re-enrolling, returning, and new students depending on the options selected in the above steps.

> If the student already has an SSY record in the focus school or year, the student's **Enter Code** and **Enter Date** do not change.
>
> The **Enter Date** for auto-accept always defaults to the first day of school. After the first day of school, the default **Enter Date** updates to the date auto-accept processes the student's registration.

Online Registration Setup Screen

6. Select the **Module Tree** tab.

7. Select the Registration Module you want to set auto-accept for.

8. Select an option for **Auto Accept Changes**.

   a. *Allow* – Auto-accepts if changes are made

   b. *Deny* – Does not auto-accept if changes are made

Online Registration Setup Screen, Module Tree Tab

If **Auto Accept Changes** is blank for any node, it defaults to the value selected in the node above it.

The **Auto Accept Changes** option also displays on the **Registration Modules** tab.

Online Registration Setup Screen, Registration Modules Tab

- Parents who submit a registration that meets the defined criteria for auto-accept receive only the 'Online Registration – Accepted' email content and not the 'Online Registration – Submitted' email content.

- Duplicate students are processed with auto-accept unless *Warning and do not allow registration* is selected for the **Select action when a duplicate student is detected during accept:** option on the **Options** tab.

Online Registration Setup Screen

Auto-Accept Setup Example

In this example, auto-accept is set up to automatically accept re-enrolling and returning students unless there was an address change, an additional parent added, or a change in the student's Demographic information. In that case, the registration must be processed manually.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

> Verify that the **Enable Auto Accept** and **Allow Auto Accept for Returning Students** options are selected and the **Allow Auto Accept for New Students** option is not selected on the **Options** tab of the Online Registration screen.
>
> Verify that the enter codes for re-enrolling and returning students are selected.

Online Registration Setup Screen

2. Select the **Module Tree** tab.

3. Click the **Online Registration** module.

4. Select *Allow* for **Auto Accept Changes**.

Online Registration Setup Screen, Module Tree Tab

5. Expand the **Family** module and select the **Family Home Address** module.

6. Select *Deny* for **Auto Accept Changes** to not auto-accept address changes.

Online Registration Setup Screen, Module Tree Tab

7. Select *Deny* for **Auto Accept Changes** for the **Parent/Guardian** module to not auto-accept the registration if a parent is added.

Online Registration Setup Screen, Module Tree Tab

> If you want to accept any of the parent changes, you can individually select the Parent page and select *Allow* for **Auto Accept Changes**. You can then select the **Auto Accept Changes** option for individual fields.

8. Repeat the same for **Emergency** and **Students** modules.

> Registrations submitted by parents are automatically processed. If a registration is not auto-accepted, the reason displays in **Notes** in the 'Registrations waiting to be processed' detail on the Registration Queue screen.

Registration Queue Screen, Registrations Waiting To Be Processed Detail

Setting Up Pathways for School Selection

Parents/guardians can select a pathway for each school selection on the School Selection screen in OLR.

Lookup Table Setup

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Navigate to the **K12.Enrollment > Pathway** lookup table.
3. Click **Add** to add pathways used within the district.

Pathway Lookup Table

4. Click **Save**.

Changing Labels in Property Override

You can change the label for the **Pathways** column in the Grade Level Max Enrollment detail on the School Setup screen using Property Override.

School Setup Screen, Grade Level Max Enrollment Detail

1. Navigate to **Synergy SIS > System > Setup > Property Override**.

2. Navigate to **K12 > K12.Setup > LanguagePathwayCap > LanguagePathway**.

3. Enter the **Label**.

Property Override Screen

4. Click **Save**.

Adding Pathways in School Setup

You can add pathways for each grade level defined in the Grade Level Max Enrollments detail in School Setup.

> School Setup is year specific. Focus to the school year the options affect.

1. Navigate to **Synergy SIS > System > Setup > School Setup**.
2. Select a **Grade** in the Grade Level Max Enrollments section.
3. Click **Show Detail**.
4. Click **Add** in the Pathways section to add a new line.
5. Select the **Pathway**.
6. Enter the **Max Capacity** up to 9999.

School Setup Screen, Grade Level Max Enrollment Detail

7. Click **Save**.

Enabling Pathway Selection in Online Registration Setup

> School Setup is year specific. Focus to the school year the options affect.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Select the *School Selection* **Module** in the Student-Specific Enrollment Modules section.
4. Click **Show Detail**.
5. Select **Show Pathways** to enable the option in OLR.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail

6. Click **Save**.

Selecting Pathways in Online Registration

The **Pathway** option on the School Selection screen in OLR allows selecting pathways.

1. Log in to OLR.

2. Navigate to the School Selection screen.

3. Select the **Pathway**.

Online Registration School Selection Screen
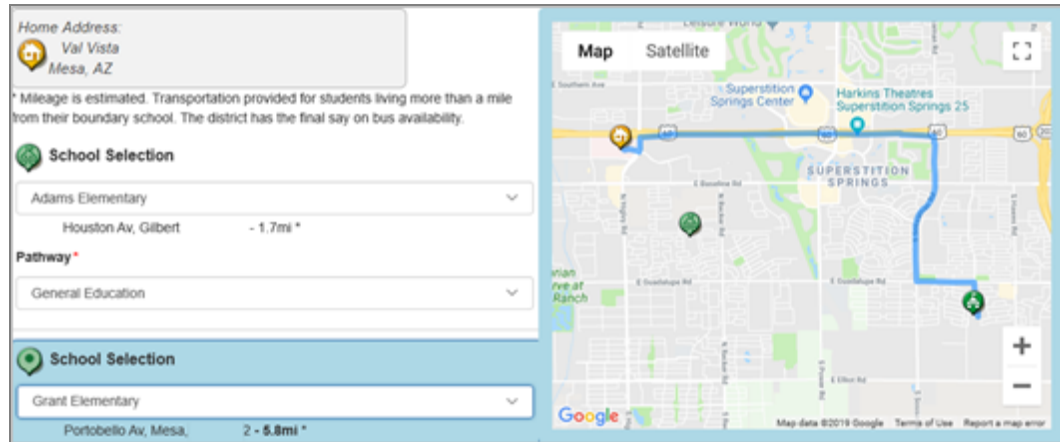
This option displays when the option is selected in Online Registration Setup and a school has pathways related to that school and student grade level.

This is a required field.

The map on the School Selection screen displays the school location when highlighted if the Google Maps API Key is in use.

Online Registration School Selection Screen

Online Registration School Selection Screen

4. Select **Review/Submit**. The Review/Submit screen displays the pathway chosen for each school selected.

> The first five schools selected display in **School Selection**.
>
> The pathways display below the selected school.

Online Registration Review/Submit Screen

5. Click the *Show All* link in the School Selection column to display all the schools selected for that student.

> The Show All link displays if there are more than five schools.
>
> The column initially lists the first five schools selected.

Online Registration Review/Submit Screen

6. Click the *Show Fewer* link to display the initial five schools selected.

Online Registration Review/Submit Screen

Viewing School Selections in Registration Queue

The **School Selection(s)** column displays the first school selection. The Pathway displays below the selected school. Hover the mouse on the column to list additional selections when there are additional school selections for that student.

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

Registration Queue Screen

Address Autocomplete

Address Autocomplete can use either Address Grid Definitions or Google Maps to find and map an address to the appropriate Home, Mail, Work, or Transportation address fields in Online Registration.

> See [Address Setup](#) for more information on Address Grid Definitions.
> See [Google Maps API Key Setup](#) for more information on Google Maps.

Online Registration Setup

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.

Online Registration Setup Screen, Registration Modules Tab

3. Select the *Family* **Module** in the Non-Student Enrollment Modules section and click **Show Detail**.
4. Select **Require home address to be inside district boundary** to use Address Grid Definitions for autocomplete.

> The autocomplete address option uses Google Maps for autocomplete instead of Address Grid Definitions if not enabled.

5. Enter a message in **Message to display if outside of district** to appear in Online Registration if the address is outside of the boundary.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

6. Click **Save**.

Autocomplete Results

The Address field lists a selection of addresses when entering information in Online Registration. Users can click the correct address to complete the process.

Home Address

Online Registration, Family Screen

Mail Address

Mail address information uses Google Maps.

Online Registration, Family Screen

Work Address

Online Registration, Parent/Guardian Screen

Transportation Address

Online Registration, Transportation Screen

Google Address Validation Opt Out

You can set Online Registration to opt out of using Google Address Validation. This option hides the address validation indicator next to the addresses.

Online Registration, Family Screen

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.

Online Registration Setup Screen, Registration Modules Tab

3. Select the *Family* **Module** in the Non-Student Enrollment Modules section and click **Show Detail**.

4. Select **Do not use Google address validation**.

Online Registration Setup Screen, Registration Modules Tab

5. Click **Save**.

Additional Setup for Districts not Using Grid Codes

To use online registration in school districts that do not have grid codes defined, the list of schools for the Online Registration School Selection is based on the **Entering Grade** for the student along with the list of schools in the district that have that grade selected in School Setup.

Online Registration, Demographics School Selection Screen

School districts with no Grid Codes defined need to complete the following Online Registration Setup:

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select the **Registration Modules** tab.

3. Select the line for *Family* and click **Show Detail** in the Non-Student Enrollment Modules section.

4. Verify that **Require home address to be inside district boundary** is not selected.

Online Registration Setup Screen, Registration Modules Tab

5. Click **Save**.

6. Select the line for **School Selection** and click **Show Detail** in Student-Specific Enrollment Modules section.

7. Select *Any School within District* for the **Schools to allow** option.

Online Registration Setup Screen, Registration Modules Tab

8. Click **Save**. The **Registration Enabled** option becomes available on the **Options** tab of the Online Registration Setup screen.

Online Registration Setup Screen

Enabling Administrator Review

The **Changes** column on the Registration Queue screen indicates when parents make modifications to a student's registration record. You can require staff to review application changes made before accepting the student's registration. Selecting this option affects all existing student registrations currently in the Registration Queue. See Viewing Changes and Critical Changes for more information.

> ⚠️ Online Registration Setup is year-specific. Focus to the school year that the enrollment options affect. This is typically the next school year after the current year.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select an option for **Require Administrator Review Before Accept**:

Online Registration Setup Screen

- *No* – Registrations do not require review prior to acceptance. This is the default option.
- *Only For Critical Changes* – Administrators only need to review the registration prior to acceptance if the parent made a critical change. A reminder message displays at the top of the 'Registrations waiting to be processed' section on the Registration Queue screen.

Registration Queue Screen

- *Yes* – Administrators must review the registration prior to acceptance if the parent made any change. A reminder message displays at the top of the 'Registrations waiting to be processed' section on the Registration Queue screen.

Registration Queue Screen

3. Click **Save**.

Chapter 6:
Registration Modules Setup

Setting Up Registration Modules

The **Registration Modules** tab on the Online Registration Setup screen contains configuration options for screens in OLR and determines how Synergy SIS processes module-specific information.

> ⚠️ You must list Online Registration Modules in a specific order. Synergy SIS disables registration and an error message displays when the setup requirements are not met if the module order is not correct.
>
> Parents must complete the Non-Student Enrollment Modules prior to Student Specific Enrollment modules.

> 📄 Focus to the school year that affects the enrollment options for Online Registration Setup.

1. Navigate to **Synergy SIS > Setup > Online Registration > Online Registration Setup**.
2. Select the **Registration Modules** tab.

Online Registration Setup Screen, Registration Modules Tab

3. Select *Reset Registration Modules to Default Settings* from the **Menu** to display the modules available for Non-Student Enrollment Modules and Student Specific Enrollment Modules.

Online Registration Setup Screen, Registration Modules Tab

4. Select **Require user to review each page** in the Modules section to require parents to click **Save and Complete** on every student and parent screen in OLR to submit an application. Non-reviewed Students and Parents display as *In Progress* instead of *Complete*.

> Use this option to force users with reenrolling students or returning students to review existing information.

5. Select the **User group to notify** when parents submit information for those modules.

> You can notify selected user groups through Tasks on the homescreen and by email once the school accepts and enrolls the student. These are typically users responsible for the information in the selected module.

6. Add conditions to student-specific enrollment modules.

    - Click [⎘] in the **Condition** column to find and select an existing condition.
    - Click [+] in the **Condition** column to open the OLR Condition window where you can define a new condition.

Online Registration Setup Screen, Registration Modules Tab

    a. Click **All are True** in the Conditions section.

    b. Change the **Type**, if needed.

- Select *All are True* for an AND condition.
- Select *Any Are True* for an OR condition.

    c. Select an option in the **Actions** menu to add additional condition info.

- *Add Container to…* – Adds an *All are True/Any are True* option to the conditions tree
- *Add Property Condition to…* – Adds a property condition to the Conditions tree. For example, only students graduating in a certain class year.

> Additional options display when selecting Parents or Emergency Contacts for the **Business Object** of a Property Condition. These additional options allow you to define the **Emergency Contact Type** and **Parent Type**.
>
> | Condition |
> |---|
> | Business Object | Property |
> | OENYearStudentModuleRelationships 🔗 | EmergencyReleaseTo ▾ |
> | Emergency Contact Type | |
> | Any Emergency Contacts ▾ | |
> | All Emergency Contacts | |
> | Any Emergency Contacts | |
> | No Emergency Contacts | |
>
> *Property Condition Screen*
>
> | Condition |
> |---|
> | Business Object | Property |
> | OENYearStudentModuleRelationships 🔗 | ReleaseTo ▾ |
> | Parent Type | |
> | Any Parents ▾ | |
> | Enrolling Parent | |
> | All Parents | |
> | Any Parents | |
> | No Parents | |
>
> *Property Condition Screen*

- *Add Special Condition to...* – Adds a condition for *Address Changed* or *Immunization Changed* as the **Special Condition Type**
- *Add Enrolling Status Condition to…* – Adds a condition for *New*, *Reenrolling*, or *Returning* students to the Conditions tree

d. Click **Simplify Conditions** after entering all your conditions. Selecting this option organizes the conditions so that you can easily read and verify the conditions set for the custom document.

OLR Condition Screen

Hovering your mouse on the **Condition** column displays the OLR Condition snapshot. The snapshot displays the condition name, description, condition tree, and the usage count.

The condition snapshot displays by default. You can hide it on the Security Definition screen.

Online Registration Setup Screen, Registration Modules Tab

7. Click **Save**. The **Conditions XML** tab displays the XML for the conditions. You can copy these conditions and use them in the **Conditions XML** tab for other documents.

OLR Condition Screen, XML Tab

Non-Student Enrollment Modules

> Only one custom defined module is allowed under Non-Student Enrollment Modules in addition to Family, Parent/Guardian, and Emergency modules.

1. Click **Show Detail**.
2. Define the Family options in the Family module:

   - In Boundary:

     a. Select an option for **Require home address to be inside district boundary**.

       - *Yes* – Enrolling parent/guardian must live within the district boundary. Parents living outside the district boundary cannot proceed after the Home Address page within OLR.

       - *Yes, unless enrolling parent/guardian has any active students* – Enrolling parent/guardian must live within the district boundary unless the parent/guardian has active students within the district.

       - *No (default)* – Enrolling parent/guardian does not need to live within the district boundary.

         > Active students are re-enrolling and returning students.

     b. Enter a **Message to display if outside of district**, if desired.

       > Address Grid Definition must be setup and Normal Address Validation must be selected in District Setup for this option to function. See the *Synergy SIS – Student Management Administrator Guide* for more information.

Online Registration Setup Screen, Registration Modules Tab

- **Documents** – Select **Do not show document upload prompts** to not include documents in the registration process.

> ⚠️ Do not select Home Address Verification options in later steps if you select this option.

Online Registration Setup Screen, Registration Modules Tab

- Student IEP Documents

  - **Do Not Show Student IEP Document Upload Prompts** – Select this option to not include documents specific to Special Education in the registration process.

  - **Student IEP Document Category** – Select a document category to identify the uploaded document for Special Education.

  > 📄 Select the Special Education module in Student Specific Enrollment Modules. The option to upload the Student IEP document only displays for those students marked as having an IEP in the Special Education module during Online Registration.

Online Registration Setup Screen, Registration Modules Tab

- Miscellaneous Documents

  - **Do Not Show Miscellaneous Document Upload Prompts** – Select this option to hide miscellaneous documents from registration

    - Add any document categories that can be uploaded in Online Registration.
    - Do not include Birth Certificate in this grid.
    - Add any additional Special Education documents.
    - Use a Category multiple times with a different description.

  To add documents:

    a. Click **Add** to add a new line.

    b. Select the **Category**. This is the document category description from the Lookup Table.

    c. Enter the **Short Description** that displays in Online Registration and the **Doc Comment** on the **Documents** tab of the Student screen.

d. Enter the **Long Description**.

e. Select the **Student Type**, **Visibility Type**, and **Required Type** to indicate when users can view or update documents, as needed.

> See [Setting Document Visibility](#) for more information.

f. Click **Save**.

Online Registration Setup Screen, Registration Modules Tab

- Home Address Verification – Primary Document

    - **Require upload of primary document for validation of home address** – Select this option if a document is required for proof of address validation

        - *Do not require* – Default option

        - *Always require* – Users must upload this documentation every registration year

        - *Require if address has changed* – Users only need to upload this if their address has changed

        - *Require if school has changed* – Users only need to upload this if submitting registration to a new school

        - *Require if school or address has changed*

    - **Upload document types allowed for primary form of address validation** – Select the document types allowed for proof of address validation

Online Registration Setup Screen, Registration Modules Tab

- Home Address Verification – Secondary Documents

  - **Require upload of secondary document for validation of home address** – Select this option if a secondary validation of home address is necessary

    - *Do not require (Default)* – Not required

    - *Always require* – Users must upload this documentation every registration year

    - *Require if address has changed* – Users only need to upload this if their address has changed

    - *Require if school has changed* – Users only need to upload this if submitting registration to a new school

    - *Require if school or address has changed*

  - **Required number of secondary forms for address verification** – The number of forms parents must upload for secondary address verification. There is no minimum requirement if left blank.

> If **Required number of secondary forms for address verification** is blank, parents must still upload at least one secondary verification document if the **Require upload of secondary document for validation of home address** option is any value except *Do not require (Default)* or blank.

  - **Upload document types allowed for secondary form of address validation** – Select the document types allowed for proof of address validation

Online Registration Setup Screen, Registration Modules Tab

3. Click **Save**.

> Any documents deleted from Online Registration delete only from Online Registration. Synergy SIS does not delete documents uploaded and posted to the Student record.
>
> The **Documents** tab on the Student screen contains the documents uploaded for the family and for the individual student after the parent/guardian clicks **Accept** in Online Enrollment. Click the **Doc Type** icon to view the document.

4. Define the Parent/Guardian Options in the Parent/Guardian module:

    -   Select the notification options, if necessary.

    -   Select the **Maximum number of parents/guardians per student** a parent can enter. This limits the number of parents/guardians users can select as having a relationship with the student on each student's Parent/Guardian Relationships screen.

        -   An error message displays at the bottom of the screen and the parent cannot proceed to the next screen until they remove the number of parents/guardians over the maximum number allowed if users exceed that number.

        -   There is no limit if left blank.

    -   Select the **Allow Editing Other Parents** option to determine if parents can make edits to data for other parents/guardians of the student.

        -   *Always* – Allows parents to edit all parent/guardian information. Synergy SIS does not secure this data from other parents/guardians. This is the default option.

        -   *If Home Address Matches* – Parents can edit existing parent/guardian data if the individual shares the same home address as the enrolling parent. Other parents/guardians display only a **Name**, and parents cannot view or edit their data.

- *Never* – Parents cannot edit existing parent/guardian information, including student address or relationship information, other than their own. This does not include the **Lives With** option for the enrolling parent.

> The parent/guardian who does not have security rights to other parent/guardians can only view the parents' **First Name**, **Last Name**, and **Gender** on the Parent/Guardian screen. These parents do not display on the Review screen.
>
> The **Edit** and **Delete** options remain available for the parents/guardians that the enrolling parent/guardian has access rights to. These parents/guardians also display on the Review screen.
>
> Student data that pertains to the restricted parent/guardian data, such as a home or mail addresses, is hidden. This includes the Student Demographics, School Selection, and Review screen.

- Select the **Require an Email Address for Parents** option:

  - *Parent email addresses are optional (default)* – Users can select **Parent/Guardian does not have an email address** for any parent/guardian at the time of registration.

  - *Enrolling parent must have an email address specified* – OLR hides the **Parent/Guardian does not have an email address** option for the enrolling parent only.

  - *All parents must have an email address specified* – OLR hides the **Parent/Guardian does not have an email address option** for all parent/guardians entered.

- Select **Do not show employment information** if employment information should not display.

- Select the **Require at least one row in the Military Status grid** option to automatically add a blank line to the Military Status section on the Parent/Guardian Military Status screen in OLR if no line already exists.

  - No line is added when the parent already has a line.

- Select any User Defined views to display, if needed.

  - Select the **Namespace.Name** you created in the View Changes screen for the Non-Student in the User Data screen – **Internal Only** list in the User Defined section.

5. Click **Save**.

6. Select the **Pages** tab to map additional pages for the parent.

   For example, you can map the OLR Military Status screen in the Parent/Guardian module in OLR to the Military Status section on the **Demographics** tab of the Synergy SIS Parent screen.

   a. Click **Add** in the Pages section.

   b. Enter an **Order** number.

   c. Select *Parent Military Status* in **Page**.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

   d. Click **Save**.

The values in the Military Status grid on the **Demographics** tab of the Parent screen map to the Military Status screen in OLR when the registration starts.

The parent can add new rows, delete existing rows, and edit the data in the cells when there are no restrictions on the grid. The Military Status on the **Demographics** tab of the Parent screen updates when the registration is accepted.

Online Registration, Parent/Guardian Screen

In this example,

- The existing values are grayed out and read-only.
- The delete line checkboxes are removed from those rows.
- The parent can edit the **End Date** on Line 2 because it has no value.
- The **Add New** button is enabled so the parent can add new rows to the grid.

Online Registration Screen, Parent/Guardian Screen

The parent cannot make any changes or additions to the grid when the **Override Value** *Read Only* is selected in OLR Setup. All of the fields, including empty fields, are read-only and the **Add New** button does not display.

e. Select the **Reenroll Property Override** tab to make existing Military Status, parent and student phone numbers, and user-defined grid information read-only in OLR.

> 📄 The Existing Read Only and Read Only override values behave the same in User-Defined (UD) grids in OLR.

f. Click **Add**.

g. Select *Grid: Military Status (K12.ParentGuardianInfo.ParentMilitaryStatus)* or *Grid: Phone Numbers (Revelation.RevPersonPhone)* in **Property**.

h. Select *Existing Read Only* in **Override Value**.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Section, Reenroll Property Override Tab

i. Click **Save**.

7. Click **Save**.

8. Define the Emergency Contact Options from the Emergency module:

- Select **Minimum required Emergency Contacts per student**. This is also the minimum required for the parent's family.

> 📄 An option allowing the parents or guardians to decline adding emergency contacts displays if the value is set to *0* or *Blank*.
>
>
>
> *Online Registration, Emergency Screen*

- Select **Maximum amount of Emergency Contacts per student**. This must be larger than the minimum selection. The maximum defaults to 10 if left blank.

- Select **Make gender an optional field**, if desired.

- Select **Do not separate first and last name** if you do not want them separated in the grid.

> See Comparing Emergency Contacts for more information on how emergency contacts display in Synergy SIS.

Online Registration Setup Screen, Registration Modules Tab

9. Click **Save**.

Student Specific Enrollment Modules

> The Demographics module must be listed before the following modules:
> - School Selection
> - Relationships
> - Immunizations
> - Health Information

1. Select which modules to display:

- Select **X** and click **Save** to remove a module and make it unavailable for online registration.

> The following modules are required:
> - Demographics
> - Ethnicity and Race
> - Relationships
> - School Selection

- Add additional modules:

> Multiple custom defined modules are allowed under Student Enrollment Modules in addition to the provided modules.

a. Click **Add** in the Student Specific Enrollment Modules section to display a new line.

b. Enter the **Order** to display the module in the parent portal.

c. Select the desired **Module**. Select the **Namespace.Name** you created in the View Changes screen for the student if you created a custom module.

d. Select the **User Group to Notify**.

e. Click **Save**.

2. Click **Show Detail**.

3. Select the **Grades** for each module.

Online Registration Setup Screen, Registration Modules Tab

> Only select the grades that your school accepts and uses in Online Registration.
>
> Selecting a grade ensures that the module displays when registering a student for that selected grade level.
>
> Blank is the default. This selects all grade levels and makes the module visible for all student grade levels while registering.
>
> Select all grades eligible for Online Registration in the School Selection module.

4. Select the Demographics options:

    ● **Enable grade level validation based on student's age** and **As of:** – Select to enable grade-level validation based on student age for Online Registration. This validation is based on the student's birth date as of a district selected date.

Online Registration Setup Screen, Registration Modules Tab

> 📄 See Grade Validation Setup for required setup.

    ● Select **Show Student Not Returning Option** to allow parents to indicate if their student is not returning to the district.

        ● Enter the **Last date for student not returning option to be shown**. This is the No Show Date and defaults to the first day of the District Calendar.

> ⚠️ You must change it to a date prior to the start of the District Calendar.

- Select the **Pages** tab and add Contact Info to allow student contact information to be stored in OLR.

Online Registration, Students Demographics Screen

- Select the **Pages** tab and add the Demographics Continued page to display the **Student's birthplace** and **Months Non-US School Attendance** fields in OLR.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Pages Tab

- Make the **Months Non-US School Attendance** field mandatory.

    a. Navigate to **Synergy SIS > System > Setup > Property Override**.

    b. Navigate to **K12 > K12.OnlineEnrollmentInfo > K12.OnlineEnrollmentInfo.Setup > OENYearStudentModuleDemographics > MonthsNonUSAttendance**.

    c. Select **Mandatory**.

Property Override Screen

    d. Click **Save**. The new **Months Non-US School Attendance** field displays on the Students Demographics, Additional Information screen only when the **Student's birth country** is not *USA*.

Online Registration, Students Demographics Screen

> The parent can enter 0-9999.
>
> The input is not validated in OLR when the parent makes the entry. However, an error occurs if the value is more than 4 digits when the registration is accepted on the Registration Queue screen.

The Review screen in Online Registration displays the new field.

Student's birth country: Aruba
Date the student entered the U.S.:12/06/2017
Date the student first attended school in the U.S.:
Student has attended school in the U.S. for less than 3 cumulative years:
Months Non-US School Attendance:24
Student's birthplace:
Birth verification document type:Birth Certificate or Affidavit
Eligible for free or reduced meals:
Family Code:

Online Registration, Review/Submit Screen

5. Select the Health Information options:

    - **Do not show Aspirin tab** – Select to hide the Advil/Tylenol questions.

94%

HealthInfoAspirin: Ian Aaron

Please indicate if you will allow the school to provide the following to your student:

Acetaminophen (Tylenol)*   ○ No   ⦿ Yes
Ibuprofen (Advil)   *   ○ No   ⦿ Yes

Online Registration, Students Health Info Screen

Online Registration Setup Screen, Registration Modules Tab

6. Select the Language Survey options:

- **No School Selection for non-English Language survey responses** – Select to deny school selection for non-English language survey students.

- **School Designated to Receive all ELL Students** – Select from the list the school designated for ELL students.

- **Special Instructions to Parents of ELL Students** – Complete this only if you selected the option of **No School selection for non-English Language survey responses** above. Enter the instructions to parents.

- **User Group to notify if no school selection is allowed** – Select from the list the user group to be notified for special processing due to ELL status.

Online Registration Setup, Registration Modules Tab

7. Select the Immunization options:

- Click the **Pages** tab to select which type of immunization screen displays.

  - **Immunization** – Displays each immunization type with dates for each dose received. Parents enter the date that the student received each dose.

  - **Immunization Status** – Displays immunizations, dates, and status as read-only. Parents indicate whether a student is compliant for each immunization type.

    > You can only add one of these screens. An error displays if you attempt to add both.

8. Upload a **Policy** document.

    > All policies and parent acknowledgments defined in ParentVUE and StudentVUE Configuration are shown to the parent during the online registration process. Synergy SIS stores responses on the Parent screen in the **ParentVUE** tab.
    >
    > Online Registration skips the Policy module if Synergy SIS does not have a policy document defined.

9. Select the School Selection options. Additional message options are available for this screen as well. The School Selection options display on the School Selection screen in Online Registration.

- School Options grid

  - **Number of School Choices** – Select the number of schools the parent can choose from the **Minimum** and **Maximum** lists.

  - **Schools to Allow** – Select from the list.

  - **Show "Mileage is Estimated" Message** – Select to display the default message: 'Mileage is estimated and transportation has the final say on bus availability.'

    > You can customize this message.

- **Add student's last enrolled school options** – Allows the district to choose the reenrollment option for the **School Selection** list in Online Registration.

  - *Blank* – Does not include the student's school of attendance

  - *Add last enrolled school only if Reason for Attendance Code is set* – Includes the student's school of attendance if the Reason for Attendance on the Student screen has a value

Student Screen

- *Always add last enrolled school* – Adds last enrolled school regardless of the Reason for Attendance setting

- **Only show student's last enrolled school** – Available only if you select a last enrolled school option

> The **School Selection** list includes the student's school of residence regardless of which last enrolled school option you select. No school of residence displays if the student's home address has no grid assignment.
>
> The student's school of attendance is also included when it is different from the school of residency if you select an appropriate last enrolled school option.
>
> When you select both *Add last enrolled school only if Reason For Attendance code is set* and **Only show student's last enrolled school** when no Reason For Attendance value exists, the school of residence displays in the **School Selection** list, if valid.

Online Registration Setup Screen, Registration Modules Tab

- **Reenroll Options** – Select the Reason for Attendance codes to deny Online Registration reenrollment for, if necessary.

Online Registration Setup Screen, Registration Modules Tab

- School Category Options section

> Adding schools here enables you to indicate schools allowing online registration, schools only accepting students living in the school's boundary, schools not allowing students already enrolled there to reenroll using OLR (Synergy SIS automatically reenrolls the student), and Attendance Reason Codes that prevent students who have it in their student record from reenrolling at the same school via OLR.
>
> You can also exclude schools and grade levels from Online Registration.

a. Click **Add** to open the School Category Add screen.
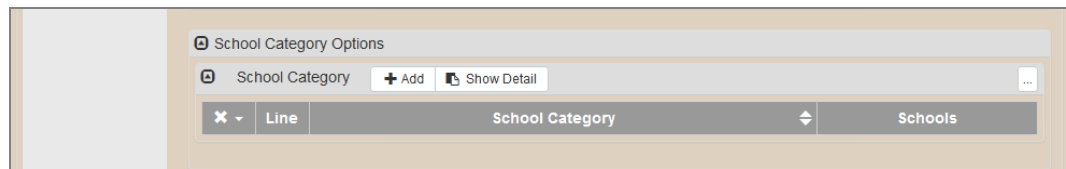
Online Registration Setup Screen, Registration Modules Tab

b. Select *Include for Online Registration* for **Category**.
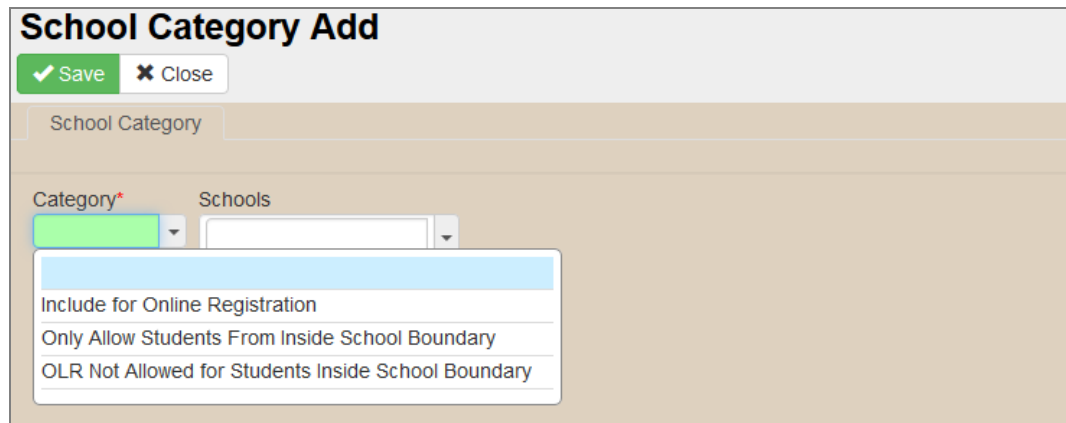
School Category Add Screen

c. Select all the magnet schools allowing OLR in **Schools**.

d. Click **Save**.

e. Click **Add** in the School Category section.

f. Select *Only Allow Students From Inside School Boundary* for **Category**.

g. Select all of the magnet schools in the **Schools** list that only allow the registration of students whose home address is in the schools' boundaries (paired magnets) to enroll.

h. Click **Save**.

i. Click **Add** in the School Category section.

j. Select *OLR Not Allowed for Students Inside School Boundary* for **Category**. (Synergy automatically reenrolls students enrolled in those magnet schools who live in the school boundary.)

k. Select all of the magnet schools that do not allow students whose home address is in the schools' boundaries (neighborhood magnets) to enroll using OLR in the **Schools** list.

l. Click **Save**.

Online Registration Setup Screen

m. Select the desired attendance reason codes to restrict students from reenrolling at the same school using OLR when they have a specialized Attendance Reason Code in the Reenroll Options section in the School Selection module.

Online Registration Setup Screen, Registration Modules Tab

The **Reason for Attendance** field displays on the Student screen.

Student Screen

10. Add User Defined Data, if needed.

Multiple view change types are allowed, if needed.

See the *Synergy SIS – System Administrator Guide* for more information on adding user-defined data.

11. Click **Save**.

Customizing Online Registration

You can add custom modules (views) and fields to the online registration process.

> Online Registration displays field labels with the following priority:
>
> 1. Translation
> 2. View Change
> 3. Property Override
> 4. User Defined Data
>
> For example, if you use Property Override to change a field name that has a translation in the user's preferred language, the translated field name always displays.

1. Use the View Change screen in Synergy SIS to add custom modules.

   - *Online Enrollment Student* – Multiple custom modules are allowed.
   - *Online Enrollment Non-Student* – Only custom modules are allowed.
   - *Online Enrollment Non-Student Internal Only* – Internal fields in the Parent/Guardian module.
   - *Online Enrollment Student Internal Only* – Internal fields in the Students module.

2. Set up the custom module or fields on the **Registration Modules** tab of the Online Registration Setup screen.

> The following options have specific limitations for Online Registration:
>
> - **Suppress Label** suppresses all labels for the field, whether the label is defined in View Change, Property Override, and/or specific field definition. However, labels display on the Review/Submit page.
> - Label information uses the hierarchy of View Change, Property Override, then field definition.
> - **Label Orientation** works only for *Left* and *Top*.
> - **Static Text** displays on the specified module pages, but not on the Review/Submit page.

> See the *Synergy SIS – System Administrator Guide* for more information on using the View Change screen.

Customizing Grids

Adding grids follows the same rules as adding other user defined fields.

> Grids are only available for the **K12.Student** and **K12.ParentGuardianInfo** Parent Object Relation properties.

You can add custom grids to Online Registration modules and existing Synergy SIS screens. The following examples show grids added on the **Parent/Guardian** tab of the Student screen and on the **Children** tab of the Parent screen.

Student Screen, Parent/Guardian Tab

Parent Screen, Children Tab

> See the *Synergy SIS – System Administrator Guide* for more information.

Adding Custom Grids to Non-Student Enrollment Modules

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select the **Registration Modules** tab

3. Select *Parent/Guardian* in the Non-Student Enrollment Modules section and click **Show Detail**.

Online Registration Setup Screen, Registration Modules Tab

4. Select the user-defined option for **User Data View**.

Online Registration Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

5. Click **Save**.

The following image shows the user-defined grid in the Online Registration process.

Online Registration, Parent/Guardian Screen

Adding Custom Grids to Student Modules

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Click **Add** in the Student Specific Enrollment Modules section to add a new line.

Online Registration Setup Screen, Registration Modules Tab

4. Enter the **Order**.
5. Select the user-defined option for **Module**.

Online Registration Setup Screen, Registration Modules Tab

6. Select any additional settings.

✖	Line	Order	Module	Grade Levels	User group to notify
■	1	1	Demographics	All Grades	
■	2	3	Ethnicity and Race	All Grades	
■	3	4	Health Information	All Grades	
■	4	4	Immunization	All Grades	
■	5	8	Previous Schools Attended	All Grades	
■	6	9	Relationships	All Grades	
■	7	10	Special Education	All Grades	
■	8	11	Discipline	All Grades	
■	9	13	School Selection	All Grades	
■	10	2	UD.PRE K Siblings		

Online Registration Setup Screen, Registration Modules Tab

7. Click **Save**.

The following image shows the user-defined grid in the Online Registration process.

Online Registration, Students Student Siblings Screen

Customizing Module Pages

Online Registration modules contain a **Pages** tab in the detail view. You can edit existing pages or add custom pages to modules. You can also set the visibility based on the enrollment scenario and include additional instructions or warning messages.

> The **Page** tab is not available for user-defined modules. However, you can add user-defined content as a new page for an existing module.

Managing Pages

1. Navigate to **Synergy SIS> Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.

Online Registration Setup Screen, Registration Modules Tab

3. Select the module to modify.
4. Click **Show Detail**.

5. Select the **Pages** tab.

Online Registration Setup Screen, Registration Modules Tab, Student Specific Enrollment Modules Detail, Pages Tab

> Click the **X** to remove a page. You cannot remove pages that contain information critical to adding a new student to Synergy SIS, such as the Demographics screen.

6. Click **Add**.

> The StudentPageAdd screen displays if adding to a Student Specific Enrollment module. The NonStudentPageAdd screen displays if adding to a Non-Student Enrollment module.

NonStudentPageAdd Screen

7. Enter the **Order**. This is the order in which the view is ranked in the module's pages.

8. Select the **Page** to add.
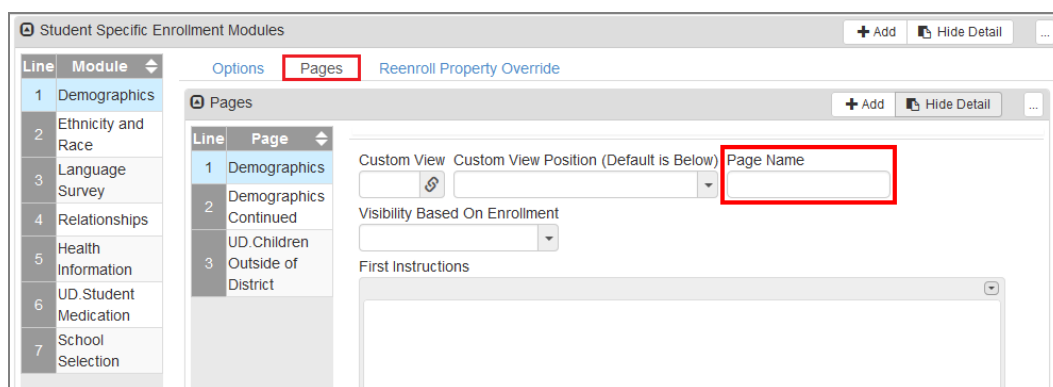
> You can only add user defined pages to Student Specific Enrollment modules, not to any other module type. User-defined pages begin with *UD*.
>
>
>
> *Add Student Page Screen*
>
> If the user-defined page has multiple tabs, they display as multiple pages in OLR.

9. Click **Save** after entering the necessary information.

10. Select a page and click **Show Detail** to modify settings.

11. Rename the page by entering a **Page Name**. You can enter hyphens (**-**) and forward slashes (*/*) in the name.

Online Registration Screen, Registration Modules Tab, Student Specific Enrollment Modules Detail, Pages Tab, Pages Detail

12. Click **Save**.

The following example shows the Military Status page added to the Parent/Guardian module.

Online Registration Screen, Parent/Guradian Military Status Screen

Adding Custom Views

Custom views allow you to add user defined pages to an existing page and module. You must add fields to the custom views on the View Change screen for them to display on the page

1. Select a page and click **Show Detail**.

2. Click 🔗 in **Custom View** to locate the user defined view to add.

Online Registration Setup Screen, Student Specific Enrollment Modules Detail, Pages Tab, Pages Detail

> You can only add views with the Online Enrollment Student View Change Type. See Customizing Online Registration for more information.

3. Select the **Custom View Position (Default is Below)**.

   - **Below Existing Fields** – The user defined field displays below existing content. This is the default option.

   - **Above Existing Fields** – The user defined field displays above existing content

4. Click **Save**.

The user defined view added to an existing view seamlessly displays on the existing page. The following example uses new fields on the Demographics page.

Online Registration, Students Demographics Page

Enrollment Visibility

You can set Student Enrollment Module pages to display based on student enrollment. The pages display for new students and re-enrolling students by default.

1. Select a page and click **Show Detail**.

2. Select the **Visibility Based on Enrollment** option.

   - **Both re-enrolling and new students (Default)** – Page displays for all students being enrolled

   - **New students only** – Page displays if the student is a new student

   - **Re-enrolling students only** – Page displays if the student is re-enrolling

Online Registration Setup Screen, Student Specific Enrollment Modules Detail, Pages Tab, Pages Detail

3. Click **Save**.

Instructions

First Instructions display at the top of the page and allow you to add instructions for the parent/guardian. This text overwrites the default text displayed.

1. Select a page and click **Show Detail**.

2. Click the arrow in **First Instructions** to display a text editor. This allows HTML and various font and formatting styles.

Online Registration Setup Screen, Student Specific Enrollment Modules Detail, Pages Tab, Pages Detail

3. Click **Save**.

The following example displays a First Instructions message on the Policies page.

Online Registration, Policies Screen

Warning Messages

Warning messages display in the footer section above **Save and Continue** in Online Registration. These provide any warnings or additional notes to users before they proceed to the next page.

1. Select a page and click **Show Detail**.

2. Click the arrow in **Warning Message** to display a text editor. This allows HTML and various font and formatting styles.

Online Registration Setup Screen, Student Specific Enrollment Modules Detail, Pages Tab, Pages Detail

3. Click **Save**.

The following example displays a warning message for address verification.

Online Registration, Warning Message

Setting Visibility Based on Student Enrollment Status

You can set visibility for student-specific pages in registration modules to exclude them for new, re-enrolling, and/or returning students. You can also enter property override values for specific items on pages to make them be read-only for re-enrolling or returning students. You can modify the settings on the **Registration Modules** tab of the Online Registration Status screen.

Setting Visibility for Pages

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup** screen.

2. Select the **Registration Modules** tab.

3. Click **Show Detail** for a module in the Student-Specific Enrollment Modules section.

4. Select the **Pages** tab.

5. Click **Show Detail** for a page to modify.

6. Select one or more of the following:

   - **Exclude for New Students** – Hides the page for newly enrolling students

   - **Exclude for Reenrolling Students** – Hides the page for reenrolling students with a continuous enrollment record

   - **Exclude for Returning Students** – Hides the page for returning students re-entering the district after being previously inactive

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Pages Tab

7. Click **Save**.

Setting Document Visibility

Documents previously uploaded in OLR for Family or Students pre-populate when reenrolling students. You can set document visibility and requirements based on student enrollment type, when addresses update, or when immunization records update. You can define these options for each document type in the Family module on the Online Registration Setup screen.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Select the *Family* **Module** and click **Show Detail**.
4. Select the **Student Type** in the Miscellaneous Documents section:
   - *All Students (default)* – Upload prompt for the document displays for all students in the registration process
   - *New Students* – Upload prompt for the document only displays for new students
   - *Reenrolling Students* – Upload prompt for the document only displays for reenrolling students with a continuous enrollment record
   - *Returning Students* – Upload prompt for the document only displays for students reentering the district after being previously inactive
5. Select the **Visibility Type**:
   - *Address Changed* – Users can only see the upload prompt for the document if their address has changed since the last registration
   - *Always* – Users can always see the upload prompt for the document
   - *Immunization Changed* – Users can only see the upload prompt for the document if their student's immunization record has changed since the last registration
   - *Never* – Users do not see the upload prompt
6. Select the **Required Type**:
   - *Address Changed* – Users only need to upload the document if their address has changed since the last registration
   - *Always* – Users must always upload the document

   > Do not use *Never* as the **Visibility Type** if you select this option.

   - *Immunization Changed* – Users only need to upload the document if their student's immunization record has changed since the last registration

- *Never* – Users are not required to upload the document

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

7. Click **Save**.

Setting Visibility for Properties

You can set specific visibility overrides for properties in both Non-Student Enrollment Modules and Student-Specific Enrollment Modules on the Online Registration Setup screen.

Editing Non-Student Enrollment Module Properties

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup** screen.

2. Select the **Registration Modules** tab.

3. Click **Show Detail** for a module in the Non-Student Enrollment Modules section.

4. Select the **Reenroll Property Override** tab.

5. Click **Add** to add a new line.

6. Select the **Property** associated with the module.

7. Select *Read Only* for the **Override Value** to prevent users from changing the value when reenrolling students. The default value allows users to update the value if left blank.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail, Reenroll Property Override Tab

8. Click **Save**.

Editing Student-Specific Enrollment Module Properties

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup** screen.

2. Select the **Registration Modules** tab.

3. Click **Show Detail** for a module in the Student-Specific Enrollment Modules section.

4. Select the **Property Override** tab.

5. Click **Add** to add a new line.

6. Select the **Property** associated with the module.

7. Select *Read Only* for **Reenrolling Students** to prevent users from changing the value when reenrolling students. If left blank, the default value allows users to update the value.

8. Select *Read Only* for **Returning Students** to prevent users from changing the value for reentering students. The default value allows users to update the value if left blank.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Property Override Tab

9. Click **Save**.

The reenroll properties set to *Read Only* in Online Registration Setup display in Online Registration as read-only.

Online Registration, Students Demographics Screen

Restrict Editing Existing Student Phone Numbers

You can make values in grids that map to existing values in Synergy SIS read-only. Parents can edit the existing cells that have no value entered and create new rows that they can edit or delete.

1. Select the **Demographic** module in the Student-Specific Enrollment Modules section and click **Show Detail**.
2. Select the **Property Override** tab.
3. Click **Add**.
4. Select *Grid: Phone Numbers (Revelation.RevPersonPhone)* **Property**.

5. Select *Existing Read Only* in **Reenrolling Students** and/or **Returning Students**.

Online Registration Setup Screen. Registration Modules Tab, Student-Specific Enrollment Modules Detail, Property Override Tab

6. Click **Save**.

Configuration Examples

Hide Birth Verification Document Type and Uploads for Reenrolling and Returning Students

Set the *OENYearStudentModuleDemographics.BirthVerifyDocGU* and *OENYearStudentModuleDemographics.DTBirthVerifyDocGU* properties to *Read Only* in the Demographics module.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Property Override Tab

Hide Address Change Confirmation Option for Reenrolling Students

Set the *OENYearModuleFamily.HasAddrChanged* property to *Read Only* in the Family module.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail, Property Override Tab

See Address Setup to make address information view only.

Parent and Student Phone Numbers Example

They phone numbers are located in:

- Parent/Guardian Contact Information
- Student Contact Information

In these examples:

- The existing values are grayed out and read-only.
- The delete line checkboxes are removed from those rows.
- The parent can edit the **Extension** fields because they have no value.
- The **Add New** button is enabled so the parent can add new rows to the grid.

Online Registration, Parent Guardian Screen

Online Registration, Demographics Screen

Creating Custom Student Documents

You can create custom student documents using mail merge. Synergy SIS generates the documents using the data entered in Online Registration (OLR). Parents and guardians can review, download, print, and submit these documents through OLR. The School personnel can view these documents in the Registration Queue. Synergy SIS posts these documents on the **Documents** tab of the Student screen after accepting the student's registration. See Viewing Data Imported from Online Registration for more information.

When you define custom student documents, Synergy SIS uses the data previously provided in the registration process to update the student registrations currently in the Registration Queue by adding these documents to the Review screen. You must create mail merge documents that display system properties and user-defined properties used in Online Registration.

Mail Merge District Definition Setup

You must create and add a mail merge document to the Mail Merge District Definition screen for every custom document.

1. Navigate to **Synergy SIS > System > Setup > Mail Merge District Definition**.
2. Click **Add** to open the Mail Merge Definition (Add) screen.

Mail Merge Definition Screen

3. Enter the **Name**, **Type**, **Default Language**, and **Mail Merge Version**.
4. Click **Save**.

Mail Merge Definition (Add) Screen

5. Click **Add** in the Mail Merge Documents section to select the mail merge document created for Online Registration custom student documents.

6. Select the **Language** the document is in.

Mail Merge District Definition Screen

7. Click **Save**.

Online Registration Setup

> ⚠️ Online Registration is year specific. Focus to the school year the enrollment options affect.

- You must define document categories for the mail merge documents in the Revelation. Attach Doc Category lookup table. See Lookup Table Definitions for more information.

- You can enable the option to require a parent/guardian to download each document.

- The Custom Student Documents section overrides the document options selected in the Family module. The **Documents** tab in OLR displays only the documents defined in the Custom Student Documents section when you select **Do not show document upload prompts**.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

Import/Export Online Registration Setup

You can copy the OLR setup from one year to another and import/export the OLR setup from one environment to another.

Export Online Registration Setup

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select *Export OLR Setup* from the **Menu** to create a zip file containing the OLR Setup files for your focus year.
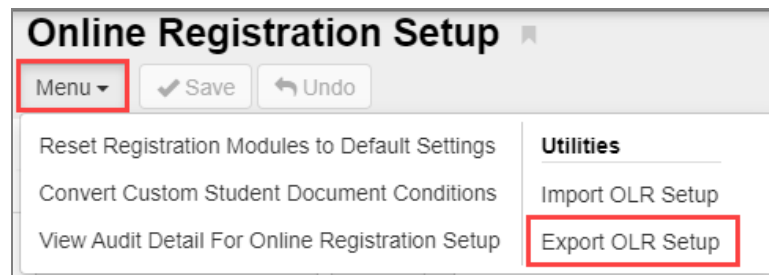
Online Registration Setup Screen

Import Online Registration Setup

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Copy an existing setup or import from a file.

   - **Copy Existing Setup**

     This option copies the OLR setup from one school year to another school year within the same environment.

     > No export is needed.
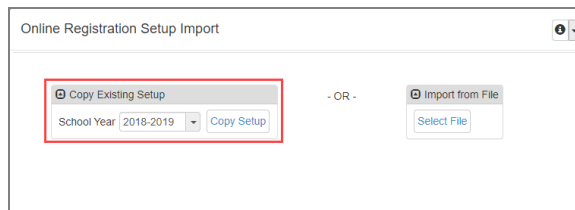
     a. Change the focus to the school year to copy the OLR setup to.

     b. Select *Import OLR Setup* from the **Menu** to open the Online Registration Setup Import window.
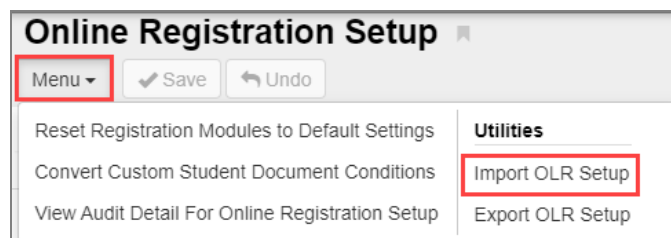
Online Registration Setup Screen

c. Select the **School Year** to copy the setup from.

d. Click **Copy Setup**.

Online Registration Setup Import Window
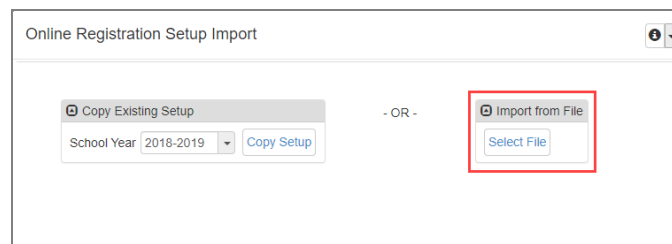
- **Import from File**

This option copies the OLR setup from one school year from one site or environment to another.

> You must first export the OLR setup file.

a. Log in to the website the OLR setup will be imported to.

b. Select *Import OLR Setup* from the **Menu** to open the Online Registration Setup Import window.

c. Click **Select File** to open the File Upload window.

Online Registration Setup Import Window

    d.   Click **Chose File** and select the OLR Setup zip file.

    e.   Click **Upload**.
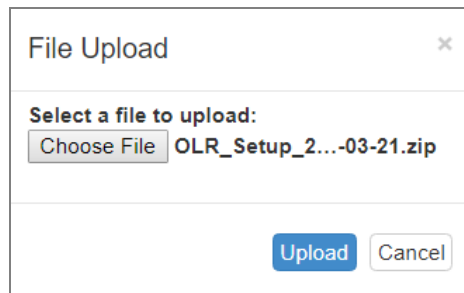
File Upload Window

    f.   Select *Insert*, *Update*, or *Replace* as the **Action** for lines in Views, Business Objects, and Mail Merge District Definition sections.

Online Registration Setup Import Window

This screen displays if there are Views, Business Objects, or Mail Merge District Definitions that need to be imported. It displays detailed information on the specific areas of data import and setup that you need to review and select and **Action** for in the User Groups, Views, Business Objects, and Mail Merge Definitions sections.

The User Groups are created empty. You need to update the members and add them to the user groups associated in the OLR setup.

Import Error Message

Missing data elements in the new environment stops the import and displays an error message with detailed information on the missing data elements. You must address these to continue with the import.
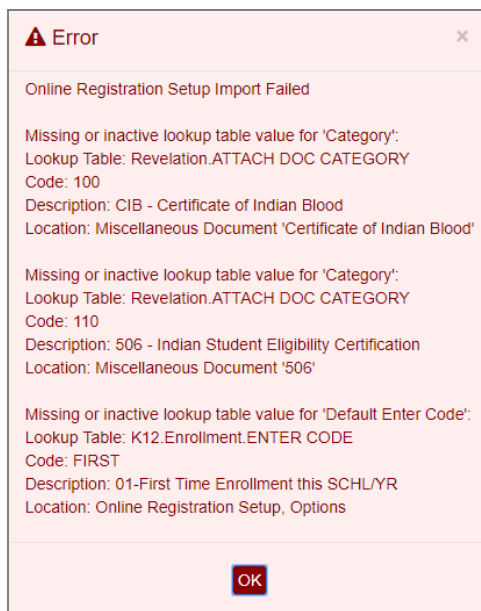
Error Message

Adding Custom Documents

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Click **Add** in the Custom Student Documents section.

3. Enter the **Order** and document **Title**. The document **Title** displays in Online Registration and on the Student screen.

4. Select the **District Mail Merge** document.

5. Select the **Document Category**.

6. Select **Require Download** to require the parent/guardian to download the document in the Documents module before submitting the student registration.

7. Select the type of student enrollments that require the document in **Include for Students**:
    New, **Reenrolling**, and **Returning**.

> The document does not display in Online Registration if you do not
> select a student enrollment option.

Online Registration Setup Screen

8. Click **Save**.

9. Click **Show Detail** to set conditions for specific students that require the document.
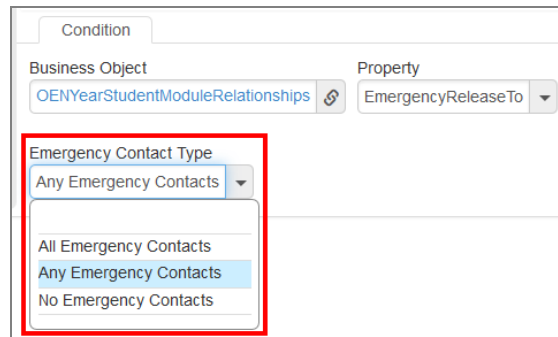
> The Options section in the Custom Student Documents detail
> displays the same options available in the Custom Student
> Documents section. Selecting an option here is the same as
> selecting the option in the **Require Download** and **Include for
> Students** columns.

10. Use the Conditions section to define specific data elements the student must meet in order to
     require the custom student document.

     a. Click **All are True** in the Conditions section.

     b. Change the **Type**, if needed.

         *   Select *All are True* for an AND condition.

         *   Select *Any Are True* for an OR condition.

     c. Select an option in the **Actions** menu to add additional condition info.

         *   *Add Container to…* – Adds an *All are True/Any are True* option to the conditions
             tree

- *Add Property Condition to…* – Adds a property condition to the Conditions tree. For example, only students graduating in a certain class year.

> Additional options display when selecting Parents or Emergency Contacts for the **Business Object** of a Property Condition. These additional options allow you to define the **Emergency Contact Type** and **Parent Type**.
>
>
>
> *Property Condition Screen*
>
>
>
> *Property Condition Screen*

- *Add Special Condition to...* – Adds a condition for *Address Changed* or *Immunization Changed* as the **Special Condition Type**

- *Add Enrolling Status Condition to…* – Adds a condition for *New*, *Reenrolling*, or *Returning* students to the Conditions tree

d. Click **Simplify Conditions** after entering all your conditions. Selecting this option organizes the conditions so that you can easily read and verify the conditions set for the custom document.

OLR Condition Screen

11. Click **Save**. The **Conditions XML** tab displays the XML for the conditions. You can copy these conditions and use them in the **Conditions XML** tab for other documents.

OLR Condition Screen, XML Tab

Excluding Document Categories

You can exclude documents uploaded from Online Registration from saving on to the **Documents** tab of the Student screen. The excluded documents are available only when they are in the **Review with the Registration Queue** tab, prior to being accepted. Once accepted, the excluded documents are not available.

1. Focus to the school year that affects the enrollment options for Online Registration Setup.
2. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
3. Click **Add**.
4. Select a **Document Category**.
5. Select **New Students** for a document category to exclude documents from saving on new student's records.
6. Select **Reenrolling Students** for a document category to exclude documents from saving on reenrolling student's records.
7. Select **Returning Students** for a document category to exclude documents from saving on returning student's records.

Online Registration Setup Screen

8. Click **Save**. The documents not selected for exclusion display on the **Documents** tab of the Student screen. The **Doc Type** is blank for the **Document Category** excluded on the Online Registration Setup screen.

Student Screen, Documents Tab

Translation Setup

You can translate messages and titles for custom student documents.

1. Navigate to **Synergy SIS > System > Setup > Translation**.

2. Select the **Business Objects** tab.

3. Select the **Translation Language**.

4. Enter *K12.onlineenrollmentinfo.setup* for the **Namespace**.

5. Enter *oenyear* for the **Name**.

6. Enter *msg** for the **Property**.

7. Click **Filter** to display these items.

Translation Screen, Business Objects Tab

8. Click **Translate** for each line in the Business Objects section.

Translation Screen, Business Objects Tab

9. Click **Save**.

10. Select the **Master Data** tab.

11. Select the **Translation Language**.

12. Select *K12.OnlineEnrollmentInfo.Setup* for the **Namespace**.

13. Select *OLRCustomStudentDoc* for the **Name**.

14. Select *Title* for the **Property 1**.

15. Click **Filter** to display these items.

Translation Screen, Master Data Tab

16. Click **Translate** for each line in the Data section.

Translation Screen, Master Data Tab

17. Click **Save**.

Viewing Documents in Online Registration

The Custom Student Documents display by student and appear on the Documents screen. Click the document name to download the document individually. You can also click **Download All Documents** to include all documents in one file.

Online Registration, Documents Screen

Parents must download any documents marked **Require Download** before continuing in Online Registration. The documents also display at the bottom of the Review screen.

Online Registration, Documents Screen

Viewing Documents in the Registration Queue

Before you accept the registration, you can download and review the custom student documents by clicking **Review** on the Registration Queue screen. The custom student documents display at the bottom of the Review screen.

Student	Document
Ian Aaron	Primary Home Language Form
	Registration Form
Billy Abbott	Primary Home Language Form
	Registration Form
🖶 Download All Documents	

Review Screen

Chapter 7:
ParentVUE Setup

ParentVUE Account Creation Options

Different options are available to prevent account duplication and duplicate email use. You can also disable ParentVUE account creation.

Account Creation Questions

You can create questions that display during the account creation process to eliminate the creation of duplicate Online Registration (OLR) accounts. These questions have accepted answers. Parents are required to respond to these questions during the account creation process to determine if an account should be created.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Select the **Online Registration** tab.

ParentVUE And StudentVUE Configuration Screen, Online RegistrationTab

3. Click **Add** in the Questions section.

4. Enter the question content:

   - **Order** – Order of the questions as they appears in ParentVUE

   - **Question** – Question the parent must answer

   - **Accepted Answer** – Expected answer to question: *Yes* or *No*

5. Edit the default **Message When Registration is Rejected** to customize the message if parents answer questions incorrectly.

ParentVUE And StudentVUE Configuration Screen, Online Registration Tab

6. Click **Save**.

The Parent Account Activation page displays the defined questions after the parent clicks the Create New Account link.

Online Registration Account Access Screen

Parents must select answers and click **Continue** or **Return to login**.

Parent Account Activation Screen

- The defined message displays indicating that the parent cannot continue the process if the answers do not match.
- The next page of Online Registration account creation opens if the answers match.

> A parent must wait seven days after a failed attempt to create a new OLR account before attempting it again.

Parent Account Activation Screen

Email Address Duplication Setup

Monitoring email addresses is another option to prevent OLR account duplication. The system validates email addresses prior to sending an account creation link to the parent. You can send an email to the parent if the email is linked to an existing account. The parent cannot create a new OLR account using that email. The parent receives the expected account creation email if the email address does not match an existing account.

1. Navigate to **Synergy SIS > System > Setup > Email Content**.

2. Click **Add** to create a new email notification for duplicate email addresses.

> See Email Setup for more information.

Email Content Screen, Content Sections Detail

3. Click **Save**.

4. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

5. Select the **Online Registration** tab.

6. Select the defined email content defined by clicking the link for **Email Content When User Email Address Already Exists**.

ParentVUE And StudentVUE Configuration Screen, Online Registration Tab

7. Click **Save**.

The parent submits their ParentVUE account information and receives an email after the system verifies their email address.

Parent Account Creation Screen

- Parents receive the email selected in ParentVUE and StudentVUE Configuration and the parent account is not created if the email address already exists.

- Parents receive the account creation email with the link to complete the account creation process if the email address does not exist.
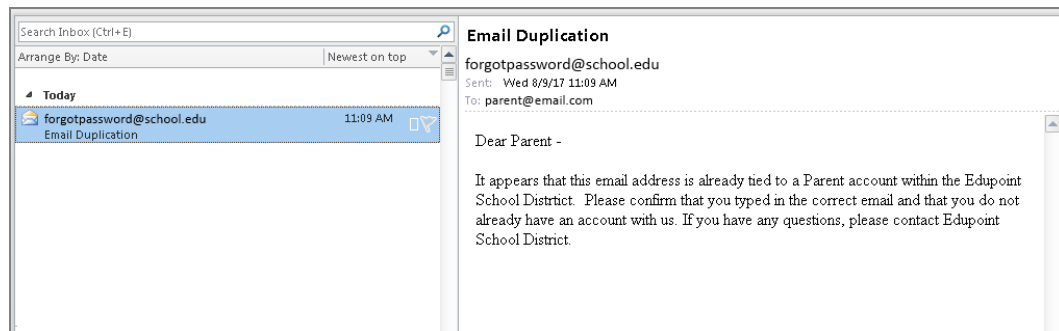
Duplicate Email Sample

Disable New Parent Creation Setup

You can disable new OLR account creation on the ParentVUE and StudentVUE Configuration screen.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Select the **Online Registration** tab.

3. Select **Do not allow new parent creation** in the Other Options section.

ParentVUE And StudentVUE Configuration Screen, Online Registration Tab

4. Click **Save**.

Parents cannot create a new Online Registration account. The link to create a new account does not display on the Online Registration Account Access screen.

Online Registration Account Access Screen

ParentVUE Setup

Setting Up Future Year Extensions

Online registration is only available for **Regular** year extensions.

The Year Extension Setup section on the ParentVUE and StudentVUE Configuration screen determines the order of year extensions, as well as allowing future extension and the next school year to be included.

1. Focus to the school year in which Online Student Registration is available.
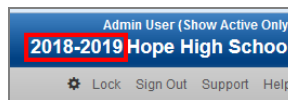
Synergy Home Screen

2. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

3. Select *Regular* or *Summer* in the **Current ParentVUE/StudentVUE Year Extension** to determine the active year for ParentVUE/StudentVUE in the Student Enrollment Information section.

The **Current ParentVUE/StudentVUE Year Extension** cannot be blank.

4. Click **Add** in the Year Extension Setup section.

5. Define the extension:

ParentVUE And StudentVUE Configuration Screen

- **Order** – Enter a unique number that signifies the order of the extensions, current year before future year.
- **Year Extension** – Select **Regular** or **Summer**.
- **Next Year** – Select if the Year Extension is not a part of current year.

> ⚠ The Year Extension Setup is not used if the extension is not found in the section.
>
> The combination of **Year Extension** and **Next Year** must be unique.
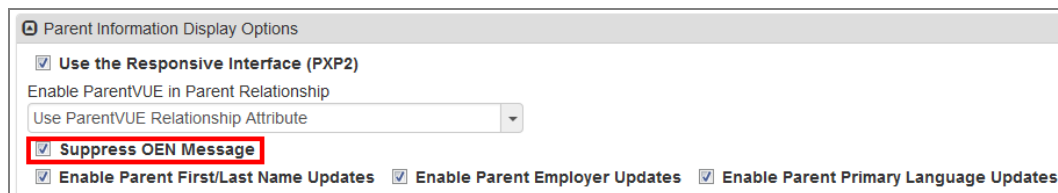
6. Click **Save**.

ParentVUE Online Registration Message

Normally, a message displays in ParentVUE notifying the parent that online registration is available. You can hide this message from displaying.
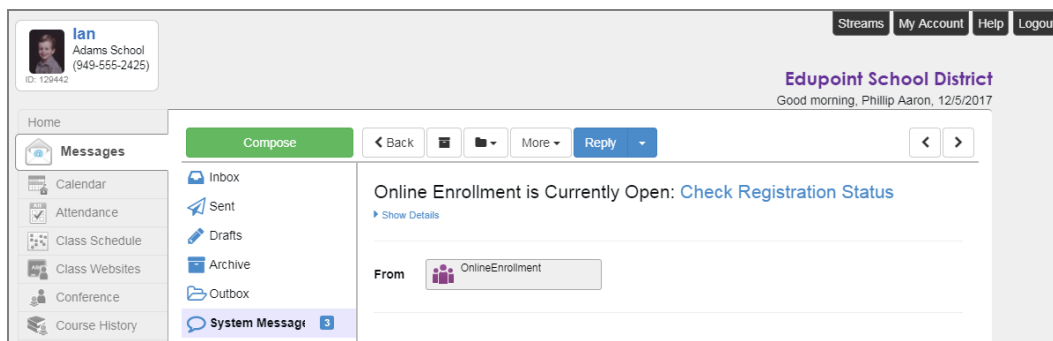
ParentVUE 2.0, Messages Tab

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.
2. Select **Suppress OEN Message**.

ParentVUE And StudentVUE Configuration Screen

3. Click **Save**.

Uploading Policy Documents

> All policies and parent acknowledgments defined in ParentVUE and StudentVUE Configuration are shown to the parent during the online registration process. Responses are stored on the Parent screen in the **ParentVUE** tab.
>
> The Policy module is skipped when the parent is using online registration if no document is provided.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Select the **Acknowledgements** tab.

3. Click **Add** in the Parent Acknowledgements section to upload the policy document.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab

4. Modify the document information:

   - **Name** – Enter the file name.

   - **Content** – Enter a description that the parent sees prior to reviewing the document.

5. Click **Save**.

6. Select a document and click **Show Detail**.

7. Select the **Applicable Grade Levels** that require acceptance of the policy.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab, Parent Acknowledgments Detail

8. Select **Require Download** to prevent parents from clicking **Yes** without downloading the document.

9. Select **Do Not Show in Online Registration** to have this acknowledgement display only in ParentVUE and not in OLR.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab

10. Enter the **Yes Response Override** to override the text that displays on the **Yes** button when asking parents to accept the policy.

11. Enter the **No Reponse Override** to override the text that displays on the **No** button.

12. Enter the **Skip Override** to override the text that displays on the **Skip** button.

13. Select **Show the "Signature" Button** to require that the parent provides an electronic signature to confirm acceptance. The signature must exactly match the name on the ParentVUE account for the **Yes** button to activate.

> Parents do not need to enter a signature to click **Skip**.

14. Select **Hide the "Skip" Button** to prevent parents from using this option.

15. Select **Hide the "No" Button** to prevent parents from using this option.

ParentVUE And StudentVUE Configuration Screen, Acknowledgements Tab

16. Click **Save**.

Making Storage Available

Make storage is available for document upload through Online Registration.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Enter a number for the **Digital Locker Size Limit (in MB)**. Documents cannot exceed the size listed.

3. Click **Save**.

ParentVUE And StudentVUE Configuration Screen

Overriding Account Information

The My Account tab cannot be used to update parent information to prevent adding conflicting parent data in Synergy SIS and reverting the current parent data to older parent data.

Changing the Label Using Property Override

1. Navigate to **Synergy SIS> System > Setup > Property Override**.
2. Navigate to **K12 > K12.PXP > PXPPublic > OEN_MyAccountInfoBoxMsg**.
3. Enter the **Label**. This text overrides the current text on the Account Information page in OLR.

> You can enter HTML code and the text displays accordingly.

Property Override Screen

Online Registration, Account Information Screen

My Account Tab
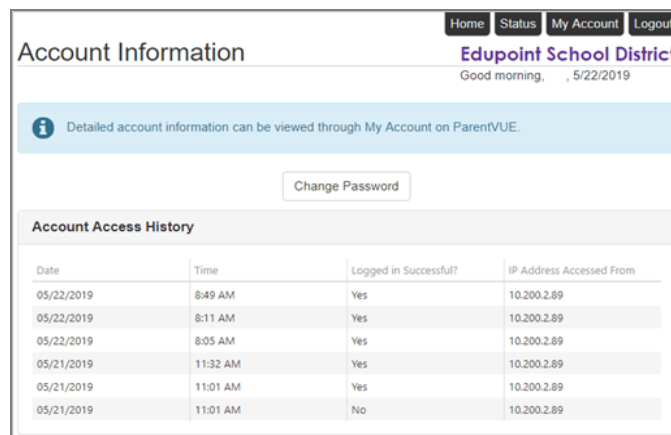
Parents only use the My Account tab in OLR to reset their password and view the login history.

1. Log in to OLR.
2. Click **My Account**.

> 📄 The information displayed in the label next to 🛈 helps parents navigate to ParentVUE and update information there instead.
>
> The My Account tab in ParentVUE displays the original My Account interface and the information can be updated from ParentVUE.

Online Registration, Account Information Screen

Customizing Parent Registration Options

Editing Messages in Online Registration

You can edit the default registration message text available to parents on the Messages page of ParentVUE.

> 📄 Deselect **Suppress OEN Message** on the ParentVUE and StudentVUE Configuration screen to use these options.
>
>
>
> *ParentVUE And StudentVUE Configuration Screen*

1. Navigate to **Synergy SIS > System > Setup > Property Override**.
2. Navigate to **K12 > K12.PXP > PXPPublic**.

3. Select one of the following properties:

- **MsgOLRBeginRegistration** – Message that appears for users beginning the OLR process
- **MsgOLRCheckRegistrationStatus** – Message that appears for users checking the status of their application
- **MsgOLRCurrentlyOpen** – Message sent to ParentVUE users informing them that OLR is open
- **MsgOLRResumeRegistration** – Message that appears for users resuming an open registration

4. Enter the new message in **Label**.

Property Override Screen

5. Repeat this process for any other messages.
6. Click **Save**.

Parent Registration Rights

The parent viewing options selected on the ParentVUE and StudentVUE Configuration screen apply to online registration. A parent can view the Student, Emergency Contacts, and Parent data if they do not have limited access.

> See *Synergy SIS – ParentVUE and StudentVUE Administrator Guide* for more information.

Parents with Registration Rights

Parents with full registration rights based on the selections on the ParentVUE and StudentVUE Configuration screen and on the **Children** tab have access to all Parent/Guardian details, Emergency Contacts, and Student data.

Online Registration, Students Screen

Parents with Limited Registration Rights

Parents with limited registration rights do not have access to the Parent, Student, and Emergency Contacts data related to that student.

The student displays in the Students to exclude from section on the Students screen. Synergy SIS also disables the **View** option.

Online Registration, Students Screen

Verify Security Relationship Attributes

> ⚠️ Do not change parent/guardian security rights while the registration process is active.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

2. Review the **Student Info Filter** in the Student Information Display Options section. This is the security right required to view the student information in Online Registration.

ParentVUE And StudentVUE Configuration Screen

3. Review the option selected in **Enable ParentVUE in Parent Relationship**.

    - *Do Not Use ParentVUE Relationship Attribute (default)* – Parents must have **Contact Allowed** and **Ed Rights** selected to view information for the child in ParentVUE.

    - *Use ParentVUE Relationship Attribute* – Parents must have **ParentVUE** and **Contact Allowed** to view information for a child in ParentVUE.

ParentVUE And Student VUE Configuration Screen

4. Click **Save**.

Additional OLR Relationship Security

1. Navigate to **Synergy SIS > Setup > Online Registration > Online Registration Setup**.

2. Select the **Parent/Guardian** tab.

3. Select the Relationship Security options to indicate which rights allow parents to view and edit student information. These options are in addition to the ones selected on the ParentVUE and StudentVUE Configuration screen.

> ⚠ Do not change parent/guardian security rights while the registration process is active.

> 📄 Only the most current record displays on the Parent/Guardian Relationships screen if duplicate student/parent relationship records exist. Any parental rights changes made in OLR transfer on the Student screen when the school accepts the registration, and Synergy SIS deletes the older student/parent relationship records.

Online Registration Setup, Registration Modules Tab

> 📄 The above image displays **Educational Rights** and **Has Custody** as selected and they cannot be modified. These options are selected on the ParentVUE and StudentVUE Configuration screen.

Parent/Guardian Relationships in OLR

The enrolling parent in OLR always has security rights to student information and has the corresponding options automatically selected on the Online Registration Setup screen on the Parent/Guardian Relationships screen. Parents cannot modify their own options to prevent parents from eliminating their own rights.

> The **Lives With** option is automatically selected based on the Primary Address for the student listed on the Student screen.

Online Registration, Parent/Guardian Relationships Screen

- Enrolling parents must select the **Relationship** for each Parent/Guardian listed and their security rights for each student.

- Parent/Guardians with the required Relationship Security rights only have access to that student's information and emergency contacts in OLR. These settings do not apply to student information in ParentVUE.

Verifying Reenrollment

The Verify Reenrollment process allows parents to skip the registration process by verifying existing student registration.

> ⚠️ You can only use the Online Registration Verify Enrollment process in the **next** school year after completing the New Year Rollover Process for the new school year.
>
> You must roll students into the new school year.
>
> You must complete and enable Online Registration Setup for the next school year.
>
> The Verification Process is for existing students only and works with the following **Enrollment Options**:
>
> - *Allow new enrollments and re-enrollments*
> - *Do not allow new enrollments*

Online Registration Setup

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select **Verification Process Enabled**.

Online Registration Setup Screen

3. Click **Save**.

Online Registration – Verify Enrollment Process

Existing parents with students that have complete registration data skip the registration modules in Online Registration and go directly to the Review/Submit screen to verify the registration. The parent can go through the modules listed to edit data, click **Review** to review and edit data, or select **Verify** and click **Submit** to verify enrollment.

Online Registration, Review/Submit Screen

Synergy SIS directs existing parents with students that have incomplete required registration data through the modules in Online Registration to complete the necessary data. Once completed, the parent submits their student registration.

Online Registration, Review/Submit Screen

The **Not Returning to District** option displays on the Review/Submit screen if you have the **Show Student Not Returning Option** enabled on the Demographics module. Synergy SIS no-shows the student with the date and summer withdrawl code assigned in Online Registration setup after accepting this registration on the Registration Queue screen.

See [Setting Up Registration Modules](#) for more information.

Online Registration, Review/Submit Screen

Synergy SIS – Verification Process

Registrations with No Changes

Verified enrollments with no changes made to the registration data display on the OEN Verification List screen. No other process is necessary for these enrollments unless you want to change the **Current Enter Code**.

The OEN Verification List screen lists all students with enrollments verified through Online Registration, Registration Queue, or Student screens.

> The Total Verification List displays the verification count. The filter options are not reflected in the count. Some processes such as accept or retract may require you to refresh the screen to update the registration count.

1. Navigate to **Synergy SIS > Online Registration > OEN Verification List**.

OEN Verification List Screen

2. Modify the **Current Enter Code**, if needed.

Student Screen, Enrollment History Tab

3. Click **Save**.

Registrations with Changes

Registrations submitted with changes made to registration data post to the Registration Queue screen in Synergy SIS. The school/district assigned personnel review and process the data by accepting or denying the registration. Accepted registrations post to the OEN Verification List.

Student Enrollment Verification

The **Enrollment** tab on the Student screen indicates Enrollment Verification. You cannot manually update the enrollment verification data. The information displayed depends on the method used to accept the registration.

- Registration accepted in Registration Queue:
    - **Verified Date** displays the date the user accepted registration.
    - **Verified By** displays the school/district personnel who accepted the registration.
- Enrollment verified and submitted through Online Registration:
    - **Verified Date** displays the date the parent verified the enrollment through Online Registration.
    - **Verified By** displays the parent that logged in and verified the enrollment through Online Registration.
- Enrollment verified by clicking **Verify Enrollment** on the **Enrollment** tab of the Student screen:
    - **Verified Date** displays the date the user verified enrollment.
    - **Verified By** displays the school/district personnel who verified enrollment.
    - **Verified In Person** indicates that the user verified enrollment in person.

Student Screen, Enrollment Tab

Open Online Registration from Parent

Districts that have Online Registration can use **Open ParentVUE as Parent** to open the parent's OLR information.

1. Navigate to **Synergy SIS > Parent > Parent**.
2. Select the **ParentVUE** tab.
3. Click **Open ParentVUE as Parent**.

Parent Screen, ParentVUE Tab

4. Select the **Registration** tab or the **Online Registration** tab in ParentVUE.

ParentVUE 1.0 Screen, Registration Tab

ParentVUE 2.0 Screen, Online Registration Tab

You can view and edit the parent's OLR information.

Online Registration, Students Screen

Using Mobile Devices for Online Registration

Registration using iOS and Android mobile devices, including cell phones and tablet computers, is user-friendly. This may also affect desktop computers, particularly when the screen size is reduced to less than 1000 pixels wide.

> You must have the minimum versions for ParentVUE and StudentVUE applications.
>
> - ParentVUE – Version 5.3.11
> - StudentVUE – Version 5.3.12

OLR Menu Icon

When the screen width of a device is less than 1000 pixels, usually with mobile devices unless it is a tablet held in landscape mode, the OLR menu usually displayed on the left side of the screen is replaced with a three-bar icon on the top left of the screen. Tapping on the icon opens the menu.
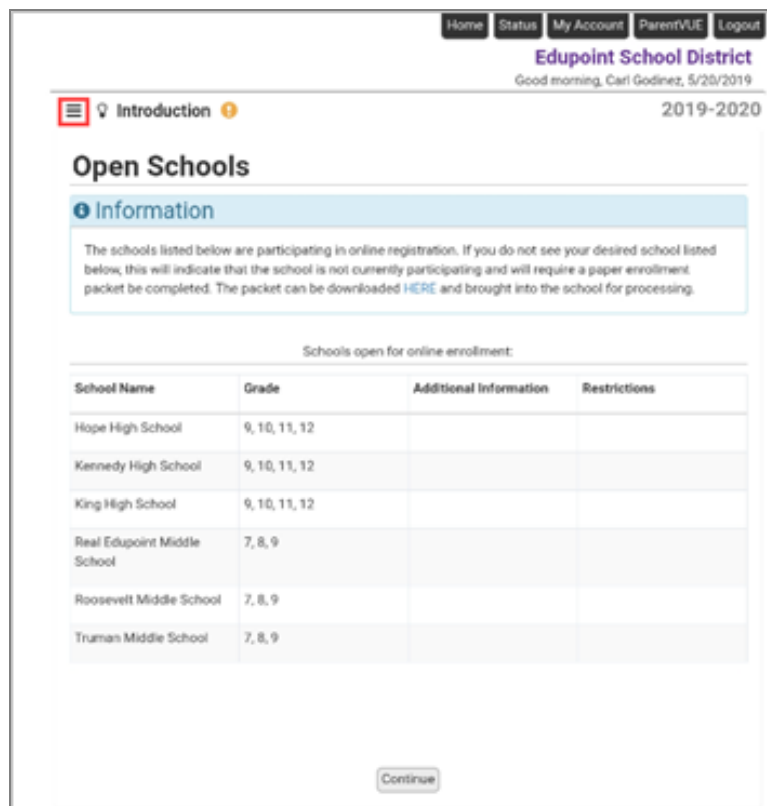
Online Registration Home Screen

1. Log in to OLR.

2. Click ☰.
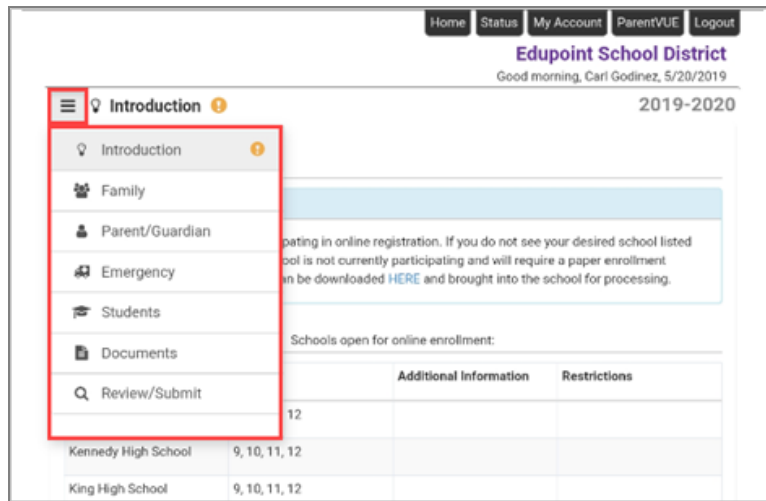
Online Registration Home Screen

This screen displays the OLR menu on the left side of the screen without the ☰ icon when the width is greater than 1000 pixels on a tablet computer in landscape mode.

Progress Bar

There is no progress bar shown at the top of the pages in OLR when the screen width of a device is less than 1000 pixels.

- With the progress bar
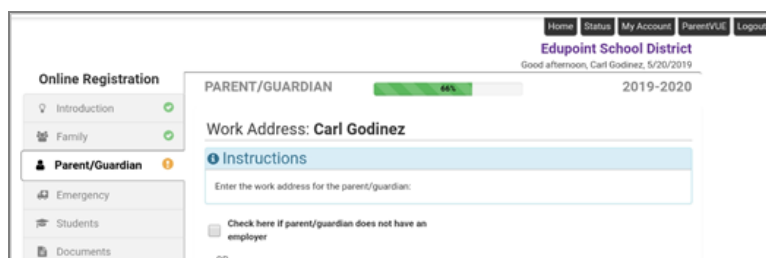
Online Registration, Parent/Guardian Screen

- Without the progress bar

Online Registration, Parent/Guardian Screen

No Documents Page Displayed

The Documents page does not display in OLR when there are no documents to upload. The **Document Upload** option displays in OLR when the *Demographics Continued* **Page** is included for the *Demographics* **Module** in the Student-Specific Enrollment Modules section as a proof of birth is required. The Documents page does not display in OLR when this page is not included, and no document in the Non-Student Enrollment Modules can be uploaded.

> This is not device-dependent.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select the **Registration Modules** tab.
3. Select the *Demographics* **Module** in the Student-Specific Enrollment Modules section.
4. Click **Show Detail**.
5. Select the **Pages** tab.
6. Click **X** for the *Demographics Continued* **Page** if it exists, to ensure that it is not included.

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Pages Tab

7. Click **Save**.

There may not be any documents to upload in the *Family* **Module** in OLR. But if the **Do not show document upload prompts** option in the Documents section is selected, the upload prompts definitely do not display.

1. Select the *Family* **Module** in the Non-Student Enrollment Modules section.
2. Click **Show Detail**.
3. Select **Do not show document upload prompts**.
4. Click **Save**.

Online Registration Setup Screen, Registration Modules Tab, Non-Student Enrollment Modules Detail

Removed Phone Number of Emergency Contacts from Emergency Contact Order Page

The phone numbers of the emergency contacts no longer display on the Emergency Contact Order page.

	This is not device-dependent.

Online Registration, Students Emergency Contact Order Screen

Default Language Survey Page

When the **Reset Registration Modules to Default Settings** menu option is selected, the *AZ Language Survey page* is selected as the default page for the *Language Survey Module* for Arizona districts. For all other states, the *Language Survey* is the default page.

	This is not device-dependent.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Select *Reset Registration Modules* to *Default Settings* from the **Menu**.

Online Registration Setup Screen

3. Select the **Registration Modules** tab.

4. Select the *Language Survey* **Module** in the Student-Specific Enrollment Modules section.

5. Click **Show Detail**.

6. Select the **Pages** tab.

    - For all AZ districts

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Pages Tab

    - For all non-AZ districts

Online Registration Setup Screen, Registration Modules Tab, Student-Specific Enrollment Modules Detail, Pages Tab

Chapter 8:
Managing Online Registration

Registration Queue Setup

Setting Review-Only Mode

You can set the Registration Queue to Review-Only Mode for all users.

> This option hides the Accept and Deny Actions in the Registration Queue, allowing only review of registrations.
>
> This option affects the Registration Queue for all school years.

1. Navigate to **Synergy SIS > System > Setup > District Setup**.
2. Select the **System** tab.
3. Select **Review-Only Mode** in the Registration Queue section.

District Setup Screen, System Tab

4. Click **Save**.

Registration Queue Screen

Prevent Acceptance for Inactive Students

You can stop users from accepting online registrations for inactive students in the Online Registration (OLR) school year. This option prevents the creation of an enrollment record for a student that is not returning in that school year.

> This option only affects students in the Registration Queue that previously no-showed or are not active in the current OLR school year. Students with enrollment records in the school year process normally.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.
2. Select *Do not allow accept, do not email parent on deny* for **Action to perform when student is not active in the OLR year**.

Online Registration Setup Screen
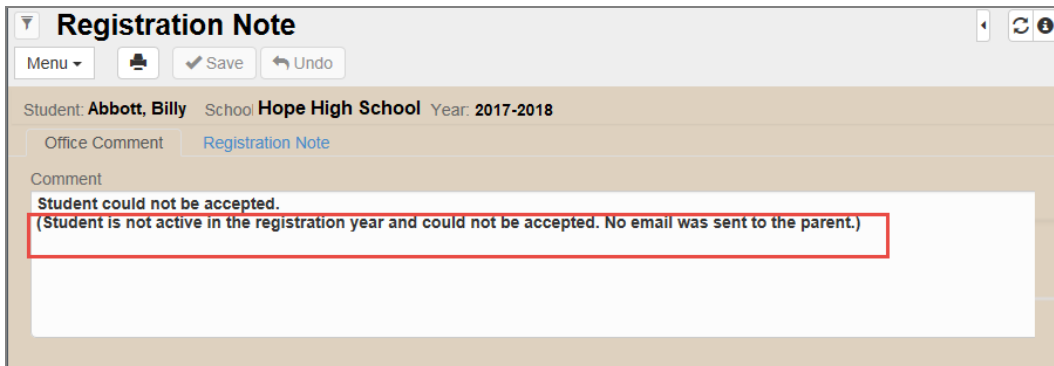
3. Click **Save**.

An error message generates indicating that the student is inactive and the registration cannot be completed when accepting the student on the Registration Queue screen. The registration remains in the queue.

Job Details Window

Select the **History** tab and view the record after denying the registration for a student. Click the **Office Comment** link to view the **Comment** that has *(Student is not active in the registration year and could not be accepted. No email was sent to the parent.)* added to the end of the entry.

Registration Note Screen

Managing the Registration Queue

The user group designated as enrollment management uses the Registration Queue screen. They are notified of a new registration application and control the approval of new student enrollment at a given school. The screen has two tabs:

- The **Registrations** tab displays all the submitted online registration requests waiting for processing.

- The **History** tab provides a list of processed online registration applications for that given year.

> You can use the Query screen to access data for submitted registrations using the **ProgressData** field of the *K12.PXP.PXPOENProgressStudent* business object. The **Status** value determines if the data is for registrations *Waiting* in a registration queue, or for processed registrations that are *Accepted* or *Denied*.
>
> See the *Synergy SIS – Query and Reporting Guide* for more information on running queries.

Viewing the Registrations Tab

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

> You can sort registration by certain values, such as **Registration Date** and **Grade**.
>
> The Total Pending Registrations displays the pending registration count. The filter options are not reflected in the count. Some processes such as accept or retract may require you to refresh the screen to update the registration count.

Registration Queue Screen

2. Review the registration information.

- Click ✉ to email the parent who completed the registration application directly from the **Parent Email** column.

- In the Boundary column:

    - ✔ – Indicates the student home address is within the boundary of the school

    - 🏫 – Indicates the student's home address is within the district boundary, but is outside of the school boundary

    - Blank – Indicates the student's home address is outside of the district and school boundary

- Registration Notes:

    a. Select **Enter a Note** to enter a note concerning the student's registration. The Registration Note screen displays with two tabs.

        - Use the **Office Comment** tab to save in the Office Comment column on the History tab.

        - Use the **Registration Note** tab to save in the Note column on the **Registrations** tab.

    b. Click **Save**. The registration note saves in the student registration.

    > These notes are for the Registration Queue and are not saved to the student record, shared with other schools, or included in parent emails.
    >
    > The **Note** remains with the student registration record when moved to the **History** tab after the student registration is accepted or denied.
    >
    > The Office Comment on the Registration Denial Confirmation window saves on the History tab when denying a student registration.
    >
    > Click the link, delete the text, and click **Save** to clear the **Office Comment** or **Note**.

- **Registration Flags** indicate that this enrollment contains information for review by the user group designated for that area. For instance, the health office staff would review health issues or the vice-principal might review discipline issues. Hover over the icon to display a message.

    - **Disc** – Indicates that the student has a discipline incident in their history

    - **ELL** – Indicates that the student has an ELL program in their history

    - **Health** – Indicates that the student has a health condition

    - **SE** – Indicates that the student has Special Education needs

- **Reenroll** – Indicates that the student is reenrolling

  - – Indicates the student was previously enrolled in the current school. Hover over the icon to view the school year and school.

  - – Indicates the student was previously enrolled in a different school. Hover over the icon to view the school year and school.

  - – Indicates a student not returning. Click **Accept** to process the student enrollment, which no-shows the student with the date and summer withdrawal code selected in the Online Registration Setup.

- **Duplicate** – Indicates that the student might be a duplicate. See Finding Duplicates.

- **Documents** – The left column indicates that you can download attached documents. The right column indicates that documents will be delivered to the school. See Viewing Uploaded Documents.

- **Changes** – The left column indicates that a normal change was made to the student's application. The right column indicates that a critical change was made to the student's application. See Viewing Changes and Critical Changes.

Registration Queue Screen, Registrations Tab

3. Select an Action to **Review**, **Find**, **Accept**, or **Deny** the registration.

> Your district selected Review-Only Mode or modified your permissions if **Review** is the only action displayed here.

Viewing Uploaded Documents

You can view uploaded documents on both the Registration Queue screen and when reviewing the student's OLR application.

Viewing Documents in the Registration Queue

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.
2. Select a registration with document flags and click **Show Detail**.

Registration Queue Screen

3. Review the documentation information:

   - Uploaded Documents – Includes the documents uploaded from OLR by the parent/guardian

   > The **New** option in the Uploaded Documents section indicates it is the first time the parent/guardian uploaded the document with this student registration, instead of the document displaying due to re-enrollment.

- Documents to be Delivered – Includes the documents the parent/guardian will hand-deliver

Registration Queue Screen

4. Click the **Download** icon in the Uploaded Documents section to open the document.

Viewing Documents in OLR

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.
2. Click **Review** to view a registration. The Review/Submit screen in OLR displays.

Registration Queue Screen

3. Select **Documents**.

4. Review the documentation information:

- Click the link under the **Document Type** to download the document uploaded by the parent/guardian.

> The uploaded documents display in the **Documents** tab of the Student screen after accepting the registration. See [Viewing Data Imported from Online Registration](#) for more information.

Online Registration, Documents Screen

- Documents with **I will deliver a hard copy to the school instead of uploading it** indicate a document that the parent/guardian will deliver.

Online Registration, Documents Screen

Viewing Changes and Critical Changes

You can view the **Changes** flags in the Registrations Flags section. The **Changes** column displays a **Change** flag for any of the following:

- The Change flag only displays for changes to existing parent Demographics, Home Address, Mail Address, Contact Information, and Relationship Rights.
- The Change flag displays for new parents added to or existing parents removed from existing students.

The **Changes** column displays a **Critical Change** flag for any of the following:

- Changes to parent/guardian names
- Changes to student names

> The Changes and Critical Change flags do not display for parents of new students.
>
> Registration changes might require review by school staff before you can accept the application depending on your school's settings. See Enabling Administrator Review for more information.

The following example displays hovering over a normal **Change**:

Registration Queue Screen

The following example displays when you hover over a **Critical Change**:

Registration Queue Screen

Recalculate Tool Tips Registration Flags

You only need to recalculate registration flags when you used OLR in the past and the tool tips are missing or do not contain information about what changed for the student.

Schools using OLR for the first time do not need to run this process. This process only needs to run once and updates the Registration Queue for all schools within the focus year.

1. Navigate to **Synergy SIS > Online Registration > Setup > Online Registration Setup**.

2. Verify the focus year is to the **School Year** and **Extension** to ensure you are at the correct focus.

Online Registration Setup Screen

3. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

4. Select *Recalculate Registration Flags* from the **Menu**.

Registration Queue Screen

A report displays at the end of the process indicating if the Change flags were turned on or off.

```
----------------------------------------
Student: Robinson, Michael
Hope High School (2017-2018)
Registration Date: 06/14/2018
EPC_PXP_OEN_PRG_STU.OEN_PROGRESS_STU_GU:

NOTICE_PARENT_CHANGES changed from N to Y

----------------------------------------
Student: Abbott, Billy
Hope High School (2017-2018)
Registration Date: 06/13/2018
EPC_PXP_OEN_PRG_STU.OEN_PROGRESS_STU_GU:

NOTICE_PARENT_CHANGES changed from Y to N

----------------------------------------
Student: Acevedo, April
Hope High School (2017-2018)
Registration Date: 05/31/2018
EPC_PXP_OEN_PRG_STU.OEN_PROGRESS_STU_GU:

NOTICE_PARENT_CHANGES changed from Y to N

----------------------------------------
Student: Zart, Frank
Hope High School (2017-2018)
Registration Date: 05/25/2018
EPC_PXP_OEN_PRG_STU.OEN_PROGRESS_STU_GU:

NOTICE_PARENT_CHANGES changed from N to Y
```

Recalculate Registration Flags Output

Finding Duplicates

The student is a possible duplicate in the school district, based on the student's name and date of birth when a Duplicate Registration Flag displays for a student.

Registration Queue Screen

The Registration Queue Duplicates screen can help you determine if the registering student is a duplicate.

1. Click **Find** in the **Actions** column to open the Registration Queue Duplicates screen.

Registration Queue Duplicates Screen

2. Compare the **Name**, **Birth Date**, **Grade**, and **Address** in the Registering Student Information section to those in the Students with Matching Data section. Synergy SIS pulls this information from Online Registration.

   - The results in the Students with Matching Data section are the same results received using the Student Add screen. It searches the entire school district database for active and inactive students who meet the search criteria.

   - Click in the **View** column to open the Student screen.

     > You can edit the **Last Name**, **First Name**, **Middle Name**, **Birth Date**, and **Perm ID** and click **Find** to view other search results in the Search Criteria section.

3. Change the **Enter Date**, **Enter Code**, or **FTE** values, if desired, in the Accepted Enrollment Options section. Synergy SIS pulls these values from the Registration Queue. Changing the data for these fields on this screen does not affect the options in the Registration Queue.

4. Click **Review**, **Accept**, or **Deny** in the Accepted Enrollment Options section.

    -   **Review** opens the Online Registration Review/Submit screen to review the registration.

    -   **Accept** starts the Online Registration Accept process.

    -   **Deny** opens the Registration Denial Confirmation screen. Select the **Denial Reason** and additional information.

        -   Click **Save** to continue the denial process.

        -   Click **Cancel** to cancel and close the screen.

Reviewing Online Registrations

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

2. Click **Review** in the Actions column of the application you wish to review in the Registrations waiting to be processed section.

Registration Queue

3. Click **Review** in the Review/Submit screen to display the student's information.

Online Registration, Review/Submit Screen

4. Review the application.

Online Registration, Review/Submit Screen

- Set **Show Changes** to *ON* to highlight the changes made to the student record for reenrolling or returning students in yellow. Also, when hovering over the highlighted field, a tooltip shows what the previous information was and that the enrolling parent changed the value.

- Click **Previous Change** or **Next Change** to navigate through the changes.

In the following example, the tooltip shows that there was no previous value mapped from the Student screen and the Middle Name was added by the enrolling parent.

Parent/Guardian: Wanda Ceja

✏ Edit Demographics

First Name: Wanda
Middle Name: Emelie
Last Name: Ceja
Gender: Female
Education Level: HS Graduate
Preferred language for written materials: Czechoslovakian

No previous value, this is a new entry
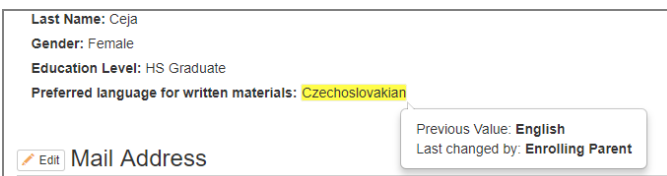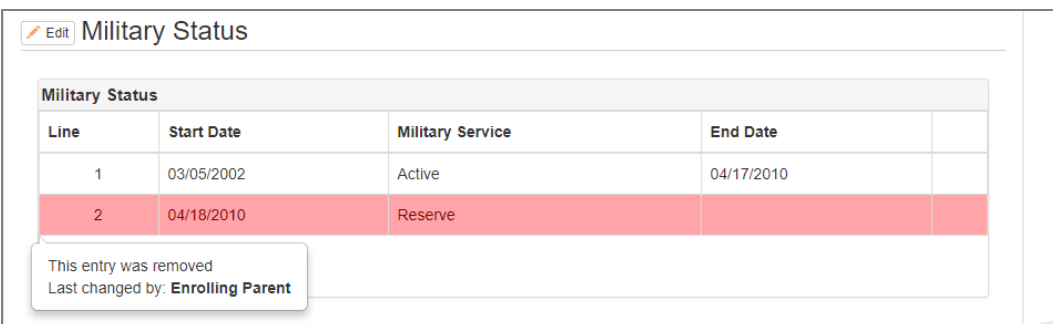Last changed by: **Enrolling Parent**

Online Registration, Review/Submit Screen

Hovering over the highlighted Preferred language for written materials field shows that the previous value from Synergy SIS was English and the enrolling parent changed it to the present value.

Last Name: Ceja
Gender: Female
Education Level: HS Graduate
Preferred language for written materials: Czechoslovakian

Previous Value: **English**
Last changed by: **Enrolling Parent**

✏ Edit Mail Address

Online Registration, Review/Submit Screen

- The row highlights in red when removed and displays the tooltip message, 'The entry was removed' and the enrolling parent who made the last change.

✏ Edit Military Status

Military Status				
Line	Start Date	Military Service	End Date	
1	03/05/2002	Active	04/17/2010	
2	04/18/2010	Reserve		

This entry was removed
Last changed by: **Enrolling Parent**

Online Registration, Review/Submit Screen

- Changes made to Parents/Guardians, Emergency Contacts, and Students display highlighted for visibility.
  - Existing individuals highlight in brown.

Online Registration, Parent/Guardian Screen

  - Added individuals highlight in green.

Online Registration, Student Screen

  - Deleted individuals highlight in red.

Online Registration, Student Screen

5. Click **Edit** to modify the information.

> Synergy SIS logs changes made to an OLR application in the Changes waiting to be processed section on the **Email Queue** tab and in the Processed Changes section on the **Changes History** tab.
>
>
>
> *Registration Queue Screen, Registrations Waiting To Be Processed Detail*
>
> Synergy SIS deletes the log entries in Changes waiting to be processed when sending the email notification that includes the application changes.

6. The registrar can change and save values in the internal use only fields for the district/school records for internal use without Synergy SIS notifying the parent/guardian. Synergy SIS saves the values to the Student and Parent records when you accept the application.

- The highlighted fields with tooltips display when the Registrar reviews the registration in the Registration Queue if the **Show Changes** is set to *ON*. Any changes or additions made by the Registrar highlight in blue and the tooltip attributes the last change to the Registrar. The history of changes display in the tooltip, including the original value from Synergy SIS, the change made by the enrolling parent, and the change made by the Registrar. For example:

  - When a value is added to a field that previously had no value, it highlights in blue and the tooltip states: No previous value, this is a new entry and shows the last change as made by the Registrar.

  - The example below shows that if the Registrar makes a change to a field that already had a value in Synergy SIS that was not changed by the enrolling parent, the tooltip gives the Previous Value and indicates the Registrar made the last change.

Online Registration, Review/Submit Screen

- In the example below, the change made to the **Preferred language for written materials** field by the Registrar was preceded by a change from the enrolling parent. The field highlights in blue, indicating the Registrar made a change and the tooltip gives the history of the prior values. The Previous Value is the original value from Synergy SIS (English), the enrolling parent changed it to *Czechoslovakian*, and the current value on the screen is from the Registrar.

Online Registration, Review/Submit Screen

- In the following example, the Work Phone number was added by the enrolling parent and highlights in yellow, the Extension was added by the Registrar and highlights in blue, the Cell Phone is white, which means it displays from Synergy SIS, the Mobile Phone was added by the Registrar and highlights in blue, and the tooltip of the Home Phone indicates it was removed by the Registrar and highlights in red.

Phone Numbers					
Line	Primary	Type	Phone	Extension	
1	☑	Work	602-555-4784	77	
2	☐	Cell	602-090-8879		
3	☐	Mobile	602-555-4111		
4	☐	Home	480-555-1830		

This entry was removed
Last changed by: **Registrar**

Online Registration, Review/Submit Screen
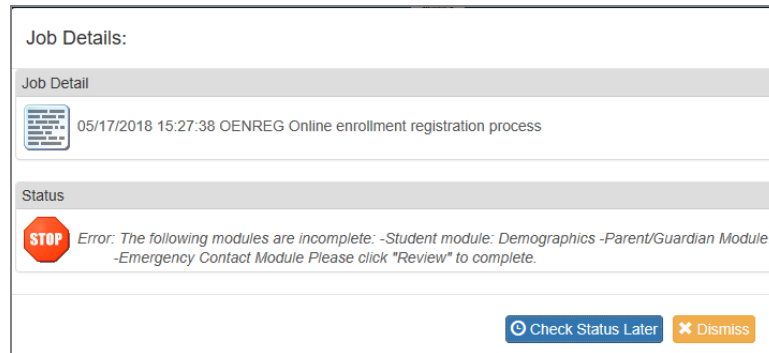
> When any field in an address is changed, all of the fields associated with the address are highlighted.
>
> When a registration that is pending in the Registration Queue is reactivated on the Online Registration tab of the Parent screen, all of the changes made by the enrolling parent and the Registrar show as made by the enrolling parent when the registration returns to OLR. All of the changes highlight in yellow, even those made by the Registrar, and the tooltips attribute the Registrar's changes to the enrolling parent.

7. Click **Print** to print the record.
8. Click **Done**.

Accepting Online Registrations

Synergy SIS validates all of the information entered in the modules for the pending registration when you accept a registration. An error message displays that indentifies the modules needing correction if incomplete information exists in one or more locations.
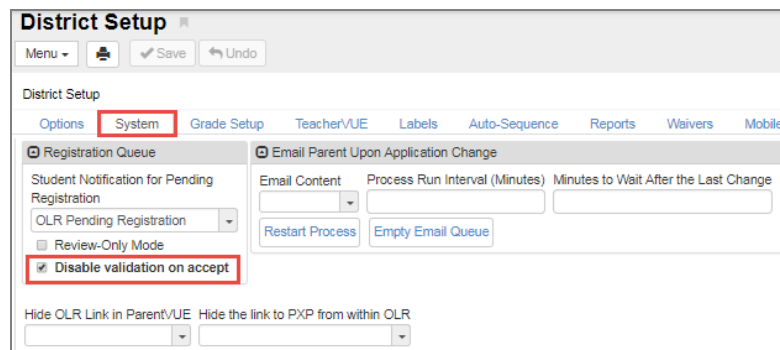
Job Details Window

You can select **Disable validation on accept** on the District Setup screen.

District Setup Screen, System Tab

Users can accept pending registrations in the Registration Queue that have custom student documents attached to the student registration. These documents display on the **Documents** tab of the Student screen.

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.
2. Select an **Enter Date**, **Enter Code**, and optional **FTE**.

3. Enter a **Note** that displays on the student's **Registration** tab, if necessary.

Registration Queue Screen

4. Click **Accept**. A confirmation web message displays.

Registration Queue Screen

5. Click **OK**. The **History** tab displays the status of the online registration application.

Registration Queue Screen, History Tab

Denying Online Registrations

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.

2. Click **Deny**. The Registration Denial Confirmation screen displays.

Registration Denial Screen

3. Select the **Denial Reason**.

4. Enter an **Office Comment** that displays on the **History** tab, if necessary.

5. **Select the next school to receive the registration request** from the list. Leave it blank if no school exists.

> This field displays if:
>
> - This is the last school the parent selected and the previous schools were denied.
>
> - You selected the district option **Allow Registration Queue to override the school to receive the registration request if denying the enrollment request, and there are no additional requested schools** during setup. See [Enrollment Management](#).

6. Click **Save**.

Retracting a Denied Registration

Retract is an option that allows the school to rescind the denied registration and place the student back into the Registration Queue with the status of *Waiting*.

- The student registration moves from the **History** tab back to the **Registrations** tab.
- Parents receive an email indicating that the retraction process completed for their student.
- The parents see the student registration Status changed from Denied to Waiting in Online Registration.

> Accept overrides Retract when executing the **Accept** and **Retract** options at the same time.

1. Navigate to **Synergy SIS > Online Registration > Registration Queue**.
2. Select the **History** tab.
3. Click **Retract** in the **Actions** column in the Registrations waiting to be processed section. A confirmation window displays.
   - Click **No** to cancel the process. No further action required.
   - Click **Yes** to activate the retract process to retract the denied registration. The Registration Retract Confirmation window displays.
     a. Enter a **Note** that appends to the Note in the student's **Registration** tab, if needed.

        > This note does not append to the parent email.

     b. Select the **Retract Reason Email** from the list.
     c. Click **Save**. The student moves to a status of **Waiting**.

Registration Retract Confirmation Window

History Tab

The **History** tab provides a list of online registration applications that have been processed, along with the **Registering Parent Name** that submitted the application.

> The Total Processed Registrations displays the processed registration count. The filter options are not reflected in the count. Some processes such as accept or retract may require you to refresh the screen to update the registration count.

Registration Queue Screen, History Tab

- Click **Retract** to rescind a denied registration.
- Click **Review** to review and print the registration.

Reviewing Registrations

The user groups selected for online registration records use the Review Registrations screen to review registrations after accepting a student at a given school.

Navigate to **Synergy SIS > Online Registration > Review Registrations**.

Students Tab

The **Students** tab provides the list of the students pending review.

> The Total Pending Students For Focused Module displays the pending registration count. The filter options are not reflected in the count. Some processes such as accept or retract may require you to refresh the screen to update the registration count.

Review Registrations Screen

- Filter the list by selecting a **Module** from the list.
- Click 🧑 in the **Student** column to open the Student screen for details on the enrollment information.
- Click ☑ in the **Approved** column to move the student to the **History** tab.

History Tab

The **History** tab provides a list of reviewed and approved online enrollment applications.

> The Total History For Focused Module displays the history registration count. The filter options are not reflected in the count. Some processes such as accept or retract may require you to refresh the screen to update the registration count.

Review Registrations, History Tab

- Filter the list by selecting a **Module** from the list.
- Click in the **Student** column to open the Student screen for details on the enrollment information.
- Click in the **Approved** column to move the student to the **Students** tab.

Parent Screen

You can review the registration status for submitted student registrations on the **Online Registration** tab of the Parent screen.

Navigate to **Synergy SIS > Parent > Parent**.

Parent Screen, Online Registration Tab

Refreshing All Modules

You can refresh all modules and correct prior issues on the Review Registrations screen. This only needs to be processed once.

1. Navigate to **Synergy SIS > Online Registration > Review Registrations**.
2. Select *Refresh All Modules* from the **Menu**.
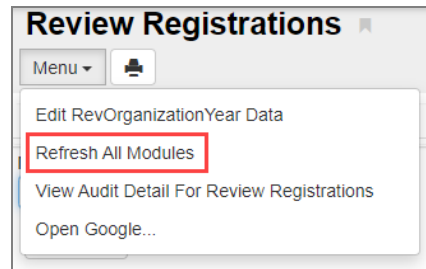
Review Registrations Screen

The **Module** column indicates what condition is assigned to the module in Online Registration Setup.

Review Registrations Screen

Online Registration Screen, Registration Modules Tab

Comparing Emergency Contacts

Emergency Contacts of siblings are automatically compared in Online Registration (OLR) to identify contacts that are probably the same person to reduce duplication on the Emergency screen.

> The contact no longer shows when reviewed from the Registration Queue if parents select **No Relationship** for an emergency contact listed for the student.

Synergy SIS considers emergency contacts to be the same person when the **First Name**, **Last Name**, and first/best phone number are identical on the **Emergency** tab of the Student screen. The first/best phone number of a student emergency contact is the first of the following to have a value:

1. **Mobile Phone**
2. **Home Phone**
3. **Work Phone**

The emergency contact displays only once on the Emergency screen for both students. The information associated with the sibling emergency contacts merges in OLR when it identifies sibling emergency contacts as being the same person. Emergency contact information is defined as being in one of the following Property Groups:

- **First Name**
- **Last Name**
- **Gender**
- **Language**
- **Mobile Phone**, **Mobile Phone Accept Text**
- **Home Phone**, **Home Phone Extn**, **Home Phone Accept Text**
- **Work Phone**, **Work Phone Extn**, **Work Phone Accept Text**
- **Other Phone**, **Other Phone Extn**, **Other Phone Type**, **Other Phone Accept Text**
- **Address**, **City**, **State**, **Zip Code**

OLR combines the information from the other property groups for the two sibling emergency contacts. When only one sibling emergency contact contains information in fields associated with a property group, that information populates the OLR emergency contact. The most current information of the two sibling emergency contact records populates the OLR emergency contact when both sibling emergency contacts contain information in fields associated with a property group.

> Parents can edit the information of each emergency contact to ensure that the data is correct after combining.

The Emergency Contact information entered in OLR updates to the corresponding fields on the **Demographics** tab of the Student screen after accepting a student registration.

Example:

Christopher Johnson displays as an emergency contact for both Jane Aaron and Ian Aaron on the **Emergency** tab of the Student screen.

- Jane Aaron's emergency contact *Christopher Johnson* displays an **Address** and **Work Phone Extn**.

Student Screen, Emergency Tab, Emergency Contacts Detail

- Ian Aaron's emergency contact *Christopher Johnson* displays a **Language** and **Mobile Phone**.

Student Screen, Emergency Tab, Emergency Contacts Detail

- The **Mobile Phone** is not listed for Jane Aaron's contact, but the **Home Phone** is listed for both Jane Aaron and Ian Aaron's contact of *Christopher Johnson*.

- Since both the name and best phone number match, OLR combines the two separate contacts into one person on the Emergency screen.

Online Registration, Emergency Screen

Online Registration, Emergency Screen

Online Registration, Emergency Screen

- After submitting and accepting the online registration for both students, the information combines and displays the **Language**, **Address**, **Work Phone Extn**, and **Mobile Phone** for the contact listed on the **Emergency** tab for both students.

Student Screen, Emergency Tab, Emergency Contacts Detail

Viewing Registrations on the Parent Tab

You can view all current, pending, and previous registrations on the **Online Registration** tab of the Parent screen. You can view errors that the parent receives while completing a registration, restart a registration in progress, and review submitted registration information.

Parent Screen, Online Registration Tab

Managing Registrations

In-Progress Registrations

The In-Progress Registrations section contains registrations currently in progress by the enrolling parent/guardian. There is one row per registration process. Synergy SIS removes the current registration from the section once the registration is submitted.

- You can view a sample of the error in the In-Progress Registrations section if an enrolling parent/guardian receives an error during the registration process. This information helps in assisting with the error.

Parent Screen, Online Registration Tab

- Synergy SIS removes it completely, requiring the enrolling parent/guardian to sign back into OLR and start over with the registration process starting with the selection of the school year if you delete an In-Progress Registration.

Parent Screen, Online Registration Tab

- Clicking **Restart Registration** keeps the in-progress registration in place for the school year. The enrolling parent/guardian starts at the beginning of the school year registration when logging back into OLR.

Confirm Window

Pending Registrations

Registrations submitted to the Registration Queue are listed in the Pending Registrations section. Students display in individual lines in the section. Synergy SIS removes the pending registration from the section once you accept or deny the registration.

- Click **Review** on a registration in the Pending Registrations or Previous Registrations section to review the student's application. This is the same information that displays when reviewing applications on the Registration Queue screen.

Parent Screen, Online Registration Tab

- Click **Reactivate Registration** to remove the pending registrations from the Registration Queue. All student registrations related to that one registration application reactivate. The enrolling parent/guardian can then log in to OLR to view/edit and resubmit the registrations.

Parent Screen, Online Registration Tab

- Students with registrations accepted prior to reactivating remain enrolled in that school. However, they display as duplicate records when the enrolling parent/guardian resubmits the registration.

- Registrations denied prior to the reactivation roll back to Review status in OLR. Synergy SIS removes the denied registration and the parent can resubmit it.

Confirm Window

- The Pending Registrations and Previous Registrations sections contain the parent's electronic **Signature** information, including the **Date** the parent provided an electronic signature and the parent's **IP Address**. This information is view-only.

Parent Screen, Online Registration Tab

Viewing Data Imported from Online Registration

Synergy SIS automatically imports data entered by parents and guardians in OLR to specific screens after accepting the student's application.

Viewing Documents on the Student Screen

All documents associated with the student display on the **Documents** tab of the Student screen after you accept the registration. Both the original document and the translated version are available if parents uploaded any translated documents.

1. Navigate to **Synergy SIS > Student > Student**.
2. Select the **Documents** tab.

Student Screen, Documents Tab

Viewing Parent Record Information

The Parent screen contains information imported from Online Registration.

1. Navigate to **Synergy SIS > Parent > Parent**.
2. Select the **ParentVUE** tab.

- During re-enrollment, the parent/guardian Email Address on the OLR Demographics screen populates the Email Address value from the **Demographics** tab on the Parent screen. The email populates from the first available email address on the **ParentVUE** tab of the Parent screen if that field is blank.

- The date and time a user created a Parent record displays in **Date Activation Key Used** on the **ParentVUE** tab. If the **Activated via Online Registration** option displays as enabled indicates that a user created the parent record using OLR.

Parent Screen, ParentVUE Tab

Viewing Student School Attended History

Information entered on the Previous Schools Attended screen in OLR displays in the Previous Schools From Online Enrollment section of the Student School Attended History screen. You can edit this data after the import completes.

Navigate to **Synergy SIS > Course History > Student School Attended History**.

Student School Attended History Screen

Chapter 9:
Security

Security Overview

The PAD Security screen (**Synergy SIS > System > Security > PAD Security**) and the Security Definition screen (**Synergy SIS > System > Security > Security Definition**) define security for each of the screens discussed in this guide. This section outlines the security location for each of the screens within Security Definition.

Edupoint recommends that users only secure reports through PAD Security instead of the Security Definition screen.

See the *Synergy SIS – Security Administrator Guide* for more details regarding security definitions.

Online Registration Security

ParentVUE User

Change settings on the **User Property Access** tab for the ParentVUE user to change what a parent sees on the screen.

Screen/Page	Section	Field	Security Node	Property Access	Setting
Emergency	N/A	In Progress	K12.OnlineEnrollmentInfo.Setup.OENYear	EmergencyInProgressButton	When set to *None*, the user cannot continue to the next module without clicking **Edit** to complete all required data before continuing.
		Mobile Number	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleEmergency	ContactPhoneMobile	When set to *None*, prevent parents from entering a mobile number as an Emergency Contact number
		Gender Address Language	K12.OnlineEnrollmentInfo.Setup.OENYear ModuleEmergency	AllAddressFields	When set to *None*, hides the Emergency Contact Demographic fields
Family	N/A	Add	K12.OnlineEnrollmentInfo.Setup.OENYear	ParentAddButton	When set to *None*, the button is hidden
		Delete	K12.OnlineEnrollmentInfo.Setup.OENYear	ParentDeleteButton	When set to *None*, the button is hidden
		Home Address Mail Address	K12.OnlineEnrollmentInfo.Setup.OEN YearModuleFamily	HomeAddress MailAddress	If used, set to *View* for reenrolling students only
	Home Address	Type to find an address	K12.OnlineEnrollmentInfo.Setup.OENYear	AddrAutocomplete	When set to *None*, the field is hidden

Screen/Page	Section	Field	Security Node	Property Access	Setting
Parent/Guardian	N/A	Home Address Mail Address Work Address	K12.OnlineEnrollmentInfo.Setup.OENYearModule	HomeAddress MailAddress WorkAddress	If used, set to *View* for reenrolling students only
		In Progress	K12.OnlineEnrollmentInfo.Setup.OENYear	ParentInProgressButton	When set to *None*, the user cannot continue to the next module without clicking **Edit** to complete all required data before continuing.
	Phone Numbers	Add Delete	Revelation.RevPersonPhone	Parent	When set to *Update*, the parent can edit the field When to *Add*, the parent add a line for phone numbers. When to *Delete*, the parent can delete the line for phone numbers.
Student	N/A	Birth Place	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleDemographics	BirthPlace	When set to *None*, the field is hidden
		Delete	K12.OnlineEnrollmentInfo.Setup.OENYear	StudentDeleteButton	When set to *None*, the button is hidden
		Family Code	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleDemographics	FamilyCode	When set to *None*, the field is hidden
		FRM	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleDemographics	EligibleForFreeReduceMeals	When set to *None*, the field is hidden
		In Progress	K12.OnlineEnrollmentInfo.Setup.OENYear	StudentInProgressButton	When set to *None*, the user cannot continue to the next module without clicking **Edit** to complete all required data before continuing.
		Include/Exclude	K12.OnlineEnrollmentInfo.Setup.OENYear	StudentIncludeExcludeButtons	When set to *None*, the buttons are hidden
		Months Non-US School Attendance	K12.OnlineEnrollmentInfo > Setup > OENYearStudentModuleDemographics	MonthsNonUsAttendance	When set to *None*, the field is hidden

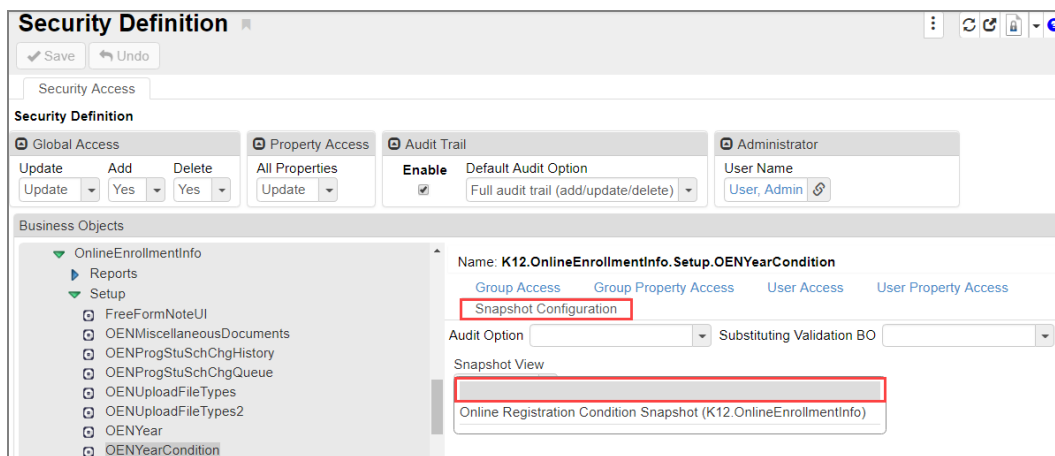| Screen/Page	Section	Field	Security Node	Property Access	Setting
Student – Information Release	N/A	Military Opt Out	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleInfoRelease	OptOutMilitary	When set to *None*, hides the option
Transportation	N/A	All	K12.OnlineEnrollmentInfo.Setup.OENYear StudentModuleTransportation	All	When set to *None*, the fields are hidden

School or District Users

Change settings for the user/user groups to change what a school or district user sees.

Screen/Page	Section	Field	Security Node	Property Access	Setting
Parent	In-Progress Registrations	Delete column	K12.PXP.PXPOENProgress	Delete	When **Delete** is set to *No*, hides the **Delete** option.
Registration Queue	Registrations Waiting to be processed	Registration Flag Columns	K12.PXP.PXPOENProgressStudent	NoticeCriticalChanges NoticeDiscipline NoticeDocHardCopy NoticeDuplicate NoticeEll NoticeGradeLvl NoticeHealth NoticeNewDocUpload NoticeParentChanges NoticeReenroll NoticeSE	When set to *None*, the columns are hidden
Registration Queue Duplicates	Students with Matching Data	All	K12.OnlineEnrollmentInfo.Setup.RegQueue DuplicateGrid		When set to *None*, the grid is hidden

More Security Definitions

Hiding the Condition Snapshot

1. Click ⚙ on the Title Bar.

2. Verify that *Show Snapshot Views* is selected in **Options**.

3. Navigate to **Synergy SIS > System > Security > Security Definition**.

4. Navigate to **K12 > OnlineEnrollmentInfo > Setup > OENYearCondition**.

5. Select the **Snapshot Configuration** tab.

6. Remove the selection of *Online Registration Condition Snapshot (K12.OnlineEnrollmentInfo)* from **Snapshot View**.

Security Definition Screen, Snapshot Configuration Tab

7. Click **Save**.

Hiding Buttons in OLR Student Health Module

Setting Up User to Model BO Security

> You must select a **User to model BO security** on the ParentVUE and StudentVUE Configuration screen and add that user to **User Property Access** on the Security Definition screen to secure the **Add** and **Delete** buttons in Security Definition.

1. Navigate to **Synergy SIS > System > ParentVUE > ParentVUE and StudentVUE Configuration**.

   a. Click 🔗 and locate a user in **User to model BO security**.

   b. Click **Save**.

ParentVUE And StudentVUE Configuration Screen

2. Navigate to **Synergy SIS > System > Security > Security Definition**.

   a. Navigate to **K12 > OnlineEnrollmentInfo > Setup > OENYearStudentModuleHealthInfo**.

   b. Select the **User Property Access** tab.

   c. Click **Add** in the Permissions section.

   d. Locate the **User Name** selected in **User to model BO security**.

Security Definition Screen, User Property Tab

   e. Click **Save**.

Hiding the Add New Condition and/or Delete Button in OLR

> The **Add New Condition** and **Delete** buttons on the Students Health screen in OLR can be shown or hidden independent of each other as they have separate properties.
>
> The **Delete** button displays for any condition added during the current OLR session.
>
>
>
> *Online Registration, Students Health Screen*

1. Navigate to **Synergy SIS > System > Security > Security Definition**.

2. Navigate to **K12 > OnlineEnrollmentInfo > Setup > OENYearStudentModuleHealthInfo**.

3. Select the **User Property Access** tab.

4. Select the user and click **Show Detail**.

5. Select *None* for **HealthConditionAddButton**.

6. Select *None* for **HealthConditionDeleteButton**.

Security Definition Screen, Business Object Detail, User Property Access Tab, Permission Detail

7. Click **Save**.

Online Registration Screen, Students Health Condition Screen

Hiding the Add New School/Home Medication and/or Delete Buttons in OLR

The school and home medication cannot be shown or hidden independently as they share the same property.

The **Delete** button displays for any medication added during the current OLR session.

Online Registration, Students Health Medications Screen

1. Navigate to **Synergy SIS > System > Security > Security Definition**.

2. Navigate to **K12 > OnlineEnrollmentInfo > Setup > OENYearStudentModuleHealthInfo**.

3. Select the **User Property Access** tab.

4. Select the user and click **Show Detail**.

5. Select *None* for **MedicalAddButton**.

6. Select *None* for **MedicalDeleteButton**.

Security Definition Screen, Business Object Detail, User Property Access Tab, Permission Detail

7. Click **Save**.

Online Registration, Students Health Medication Screen

PAD Security

Verify Enrollment Security

You can prevent the **Verify Enrollment** option from displaying on the **Enrollment** tab through PAD Security.

1. Navigate to **Synergy SIS > System > Security > PAD Security**.

2. Navigate to **Synergy SIS > Student > Student**. The security access for **K12.Student** displays.

3. Click **Show Detail**.

PAD Security Screen

4. Select *No* for **Access** next to …*Verify Enrollment (Button)* in the Tab Access section.

PAD Security Screen, Access Detail
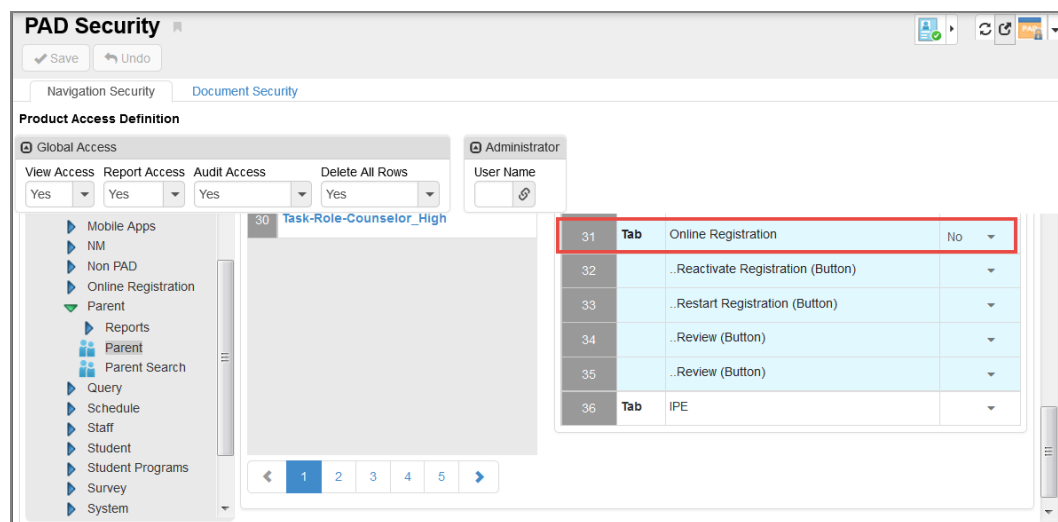
5. Click **Save**.

Online Registration Tab Security

You can hide the **Online Registration** tab on the Parent screen or hide options in the In-Progress Registrations and Pending Registrations sections.

Hide the Online Registration Tab from the Parent Screen

1. Navigate to **Synergy SIS > System > Security > PAD Security**.
2. Navigate to **Synergy SIS > Parent > Parent** in the Product Access definition Security tree.
3. Select the **User Group Name** to hide the tab from.
4. Click **Show Detail**.
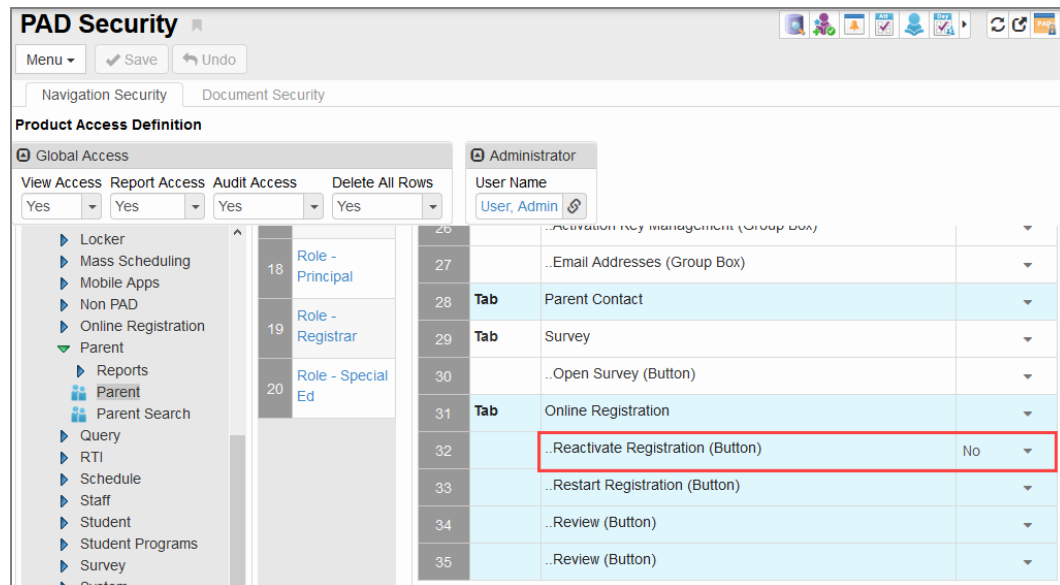5. Select *No* in the **Access** column for *Tab: Online Registration*.

PAD Security Screen, Access Detail

6. Click **Save**.

Hide the Reactivate Registration Button from the In-Progress Registrations Section

1. Navigate to **Synergy SIS > System > Security > PAD Security.**

2. Navigate to **Synergy SIS > Parent > Parent** in the Product Access Definition Security tree.

3. Select the **User Group Name** to hide the option from.

4. Click **Show Detail**.

5. Select *No* in the **Access** column for *Reactivate Registration (Button)*.
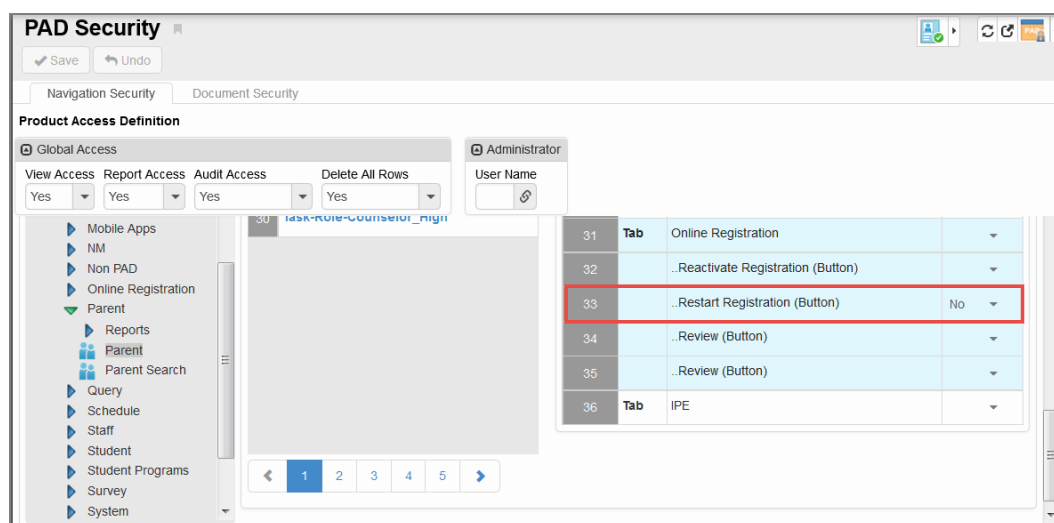

PAD Security Screen, Access Detail

6. Click **Save**.

Hide the Restart Registration Button from the In-Progress Registrations Section

1. Navigate to **Synergy SIS > System > Security > PAD Security**.

2. Navigate to **Synergy SIS > Parent > Parent** in the Product Access Definition Security tree.

3. Select the **User Group Name** to hide the option from.

4. Click **Show Detail**.

5. Select *No* in the **Access** column for *Restart Registration (Button)*.
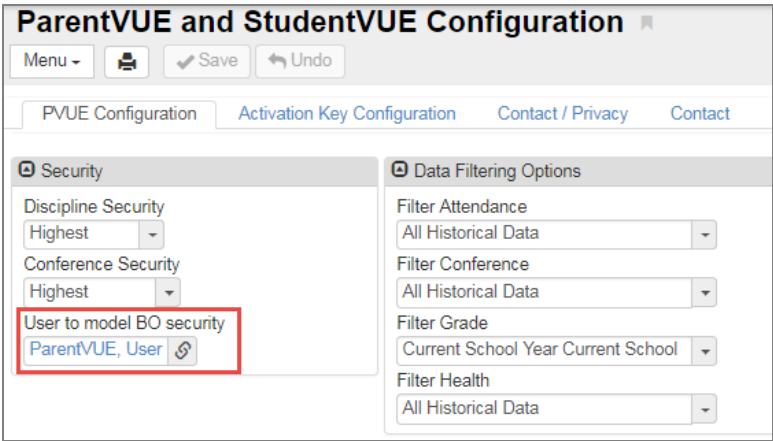

PAD Security Screen, Access Detail

6. Click **Save**.

Hide Emergency Contact Demographic

You can hide Emergency Contact Demographic fields in Online Registration (OLR).

1. Navigate to **Synergy SIS > System > Security > Security Definition**.
2. Navigate to **K12 > OnlineEnrollmentInfo > Setup > OENYearModuleEmergency**.
3. Select the **User Property Access** tab.
4. Click **Add** in the Permissions section.
5. Locate the user to modify.

> This is the same user listed under User to model BO Security on the ParentVUE and StudentVUE Configuration screen.
>
>
>
> *ParentVUE And StudentVUE Configuration Screen*

6. Click **Show Detail**.

7. Select *None* for the **Property/Update** next to the fields you want hidden.

- Gender – **DemographicsGender**
- Address (Address, City, State, Zip Code) – **AllAddressFields**
- Language – **DemographicsLanguage**

Security Definition Screen, User Property Access Tab, Permissions Detail

8. Click **Save**.