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The screens, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

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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.

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

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# Table of Contents

About This Manual ................................................................. 3  
Conventions Used in This Manual ........................................... 3  
Before You Begin .................................................................. 3  
Software and Document History ............................................ 3  
Table of Contents .................................................................. 5  

**Chapter 1: Overview** .......................................................... 7  
Overview ............................................................................. 8  
Implementation Considerations ............................................ 12  

**Chapter 2: Lookup Table Setup** .......................................... 13  
Lookup Table Setup ............................................................... 14  
Add Values to Lookup Tables ............................................... 15  
Assign a State Reporting Code to an Existing Lookup Table Value ....................................................... 16  
Deactivate a Lookup Table Value ......................................... 16  
Sort Lookup Values .............................................................. 17  
Lookup Table Definitions ..................................................... 18  
Adding Audiology Decibels ................................................... 25  

**Chapter 3: Immunization Definition Setup** ............................ 26  
Setting Up Immunization Definition ....................................... 27  
Creating Dosage Interval Validations ..................................... 28  
Creating Immunization Groups ............................................ 32  
Defining State Vaccination and Former SIS Codes .................. 34  
Disabling Immune Selection for Immunization ....................... 35  
Creating Custom Immunization Definitions ......................... 36  
Defining Health Department Information ............................... 50  
Importing & Exporting Immunization Definitions .................. 51  
Importing/Exporting Definitions as a Group ......................... 51  
Importing/Exporting Definitions Individually ........................ 52  
Securing Delete All Immunization Data ................................. 53  

**Chapter 4: Optional Health Screen Customizations** ............... 58  
Setting up Audiology Staff .................................................. 59  
Setting up Audiology Decibels ............................................. 60  
Enabling Audiology Decibels ............................................... 61  
Alternative Accident Details ................................................. 63  

---

Copyright 2003-2018 Edupoint Educational Systems, LLC
| Enabling the Alternative Accident Details | 64 |
| Displaying BMI Details | 64 |
| **Chapter 5: Accident Report and Task Setup** | 66 |
| Setting Up the Health Accident Report | 67 |
| Creating a Health Incident Mail Merge Letter | 67 |
| Creating a Mail Merge Definition | 68 |
| Attaching the Letter to the Mail Merge Definition | 69 |
| Setting Up the Healthcare Plan Report | 70 |
| Creating a Healthcare Plan Mail Merge Letter | 71 |
| Creating a Mail Merge Definition | 72 |
| Understanding Health Task Information | 74 |
| Customizing the Medication Monitor | 74 |
| **Chapter 6: Display Health Comments and Documents** | 78 |
| Set up Display Health Comments and Display Documents | 79 |
| Security Definition Setup | 80 |
| User Security Settings | 82 |
| User Groups Security Settings | 84 |
| Track and Prevent Unauthorized Changes in Health Comments | 85 |
| Restricting Health Comment Changes | 85 |
| **Chapter 7: Security** | 86 |
| Security Overview | 87 |
| Health Security | 88 |
Chapter 1: Overview

Overview .................................................................................................................. 8
Implementation Considerations ............................................................................. 12
Overview

The Health folder has screens that track where student immunizations records are entered and student health screening results are recorded. The Health folder can also record any health-related incidents and track student medications that need to be administered by school personnel. Alerts can be configured to warn staff in any screen in Synergy SIS when the student has a medical condition such as a food-related allergy or diabetes.

This manual illustrates how to setup and configure the Health-related screens contained in the Health folder. This guide also outlines the security options available for the Health screens.


The screens configured in this guide include the following:

**Health**

The Health screen logs any visits to the nurse, records any health conditions the student may have, and tracks the student’s immunizations. It can also track any medications or procedures that school personnel need to administer to the student.

![Health Screen](image-url)
**Health Log Other**

The Health Log Other screen records health-related incidents that involve non-students.

![Health Log Other Screen](image)

**Health Log Student**

The Health Log Student screen records health-related incidents for a single day.

![Health Log Student Screen](image)
Health Screen

The Health Screen screen records the results of screening tests for tuberculosis, vision, hearing, scoliosis, a general physical, and dental.

![Health Screen Screen](image-url)
Health Screen By Section

The Health Screen By Section screen allows the screening results for tuberculosis, vision, hearing, scoliosis, a general physical, and dental to be screened and entered by section.

Individual Healthcare Plan

The Individual Healthcare Plan screen lists all the Healthcare Plans created to manage a student’s chronic or long-term health issues.
Medication and Service Monitor

The Medication and Service Monitor screen lists all medications and procedures that need to be administered to students on a given date, based on the medications and procedures recorded in the Health screen for each student.

Implementation Considerations

Most states require that schools track and verify student immunizations. In order to setup and configure the Student Immunization data, ensure that you have the immunization requirements and guidelines for your state. The Center for Disease Control (CDC) also provides a guide on recommended vaccination schedules.

Synergy SIS tracks other Health information as well, such as screening data for scoliosis, vision, dental, and tuberculosis. You can record any student or staff health-related incidents and generate an Accident Report to send home to the student’s parents. Your district must provide a mail merge document for the Accident Report.
Chapter 2:
Lookup Table 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.

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.

At the top of the table, the Name of the table is listed and the Namespace lists the business object the table belongs to. If the table is locked and product-owned, it is indicated at the top of the table in the Locked value.
Add Values to Lookup Tables

To edit values for one specific field, hover over it and click the tooltip icon to open the Lookup Table screen in a new window. 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.

![Lookup Table Diagram]

### PAD Tree

#### 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 necessary.
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 necessary.
10. Enter the **Ed-Fi Code** if your district is part of the Ed-Fi Alliance, if necessary.

Refer to your State Reporting Guide to identify if there is a specific code required.
11. If appropriate, enter a **Year Start** and/or **Year End** date to activate or deactivate the code.

   If a code is inactive, it shows in historical data but is not available for selection for new records.

12. Click **Save**.

### Assign a State Reporting Code to an Existing Lookup Table Value

Refer to 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.

<table>
<thead>
<tr>
<th>Line</th>
<th>ListOrder</th>
<th>Code</th>
<th>Description</th>
<th>Other S/L</th>
<th>State Code</th>
<th>Alt Code 3</th>
<th>Year Start</th>
<th>Year End</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>0</td>
<td>A1</td>
<td>How to Categorize</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>A2</td>
<td>#111</td>
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<td>3</td>
<td>2</td>
<td>A3</td>
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<td>3</td>
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<td>#113</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

5. Click Save.

**Sort Lookup Values**

To temporarily change the sort order of the Lookup Values section, click the up and down arrows in any column heading.

To permanently modify the sort order, change the ListOrder.
**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.

<table>
<thead>
<tr>
<th>Lookup Table</th>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
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<td>K12.HealthImmunization</td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Condition Code</td>
<td>Types of health conditions</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Conditions</td>
<td>Conditions</td>
<td>Health Conditions</td>
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<tr>
<td>K12.HealthIncident</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Accident Activity</td>
<td>Activities the person was engaged in when an accident happened</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>(View Substitution applied)</td>
<td>Entries Detail, Accident Detail tab, Detail section Activity</td>
</tr>
<tr>
<td>Accident Location</td>
<td>Location where accident occurred</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>(View Substitution applied)</td>
<td>Entries Detail, Accident Detail tab, Detail section Accident Location</td>
</tr>
<tr>
<td>Action Taken</td>
<td>Actions taken by health staff in response to a health issue</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>(View Substitution applied)</td>
<td>Entries Detail, Accident Detail tab, Detail section Action Taken</td>
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<tr>
<td>Clinical Codes</td>
<td>Treatment administered</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Log tab, Clinical Code section</td>
<td>Code</td>
</tr>
<tr>
<td>Disposition Code</td>
<td>Resolution of incident, such as returned to class, sent home, sent to doctor/hospital</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Log tab</td>
<td>Disposition</td>
</tr>
<tr>
<td>Equipment</td>
<td>School equipment or structures used when an accident occurred</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>(View Substitution applied)</td>
<td>Entries Detail, Accident Detail tab, Detail section Equipment</td>
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<td>Healthassessment Code</td>
<td>Assessments a nurse or health staff can make regarding a student's health or well being</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Log tab, Health Assessment section</td>
<td>Code</td>
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<tr>
<td>Healthintervention Code</td>
<td>Interventions a nurse or health staff can take regarding a student's health or well being</td>
<td><strong>Health &gt; Health</strong></td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Log tab, Health Intervention section</td>
<td>Code</td>
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<td>Screen</td>
<td>Tab</td>
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<td>Incident Code</td>
<td>Health issues addressed, screenings, or health services provided to a student</td>
<td>Health &gt; Health</td>
<td>Health Log - Nurse</td>
<td>Entries</td>
<td>Health Code</td>
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<td>Incident Notification List</td>
<td>People who can be notified of a student's illness or injury</td>
<td>Health &gt; Health</td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Accident Detail tab, Print Health Accident Report section</td>
<td>Other Persons Notified checklist</td>
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<td>Injury</td>
<td>Injuries a student can sustain</td>
<td>Health &gt; Health</td>
<td>Health Log - Nurse</td>
<td>(View Substitution applied) Entries Detail, Accident Detail tab, Detail section</td>
<td>Injury</td>
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<td>Vitalsign Code</td>
<td>Vital signs taken such as pulse, blood pressure</td>
<td>Health &gt; Health</td>
<td>Health Log - Nurse</td>
<td>Entries Detail, Log tab, Vital Signs section</td>
<td>Vital Sign 1 Description, Vital Sign 2 Description</td>
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<tr>
<td>Lookup Table</td>
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<td></td>
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</tr>
<tr>
<td>Intervention Code</td>
<td>Interventions a nurse or health staff can take regarding a student's health or well being</td>
<td>Individual Healthcare Plan</td>
<td>Student</td>
<td>Healthcare Plan – Click Add, Healthcare Plan tab, Intervention section</td>
<td>Intervention Code</td>
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<tr>
<td>Medical Diagnosis</td>
<td>Medical diagnosis a student can have as part of their healthcare plan</td>
<td>Individual Healthcare Plan</td>
<td>Student</td>
<td>Healthcare Plan – Click Add, Healthcare Plan tab, Intervention section</td>
<td>Medical Diagnosis</td>
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<td>K12.HealthInfoSetup</td>
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<td>Health Type Of Record</td>
<td>Types of immunization records</td>
<td>Health &gt; Health</td>
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<td>Immunization Record Data</td>
<td>Type of Record</td>
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<td>Lookup Table</td>
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</tr>
<tr>
<td>K12.HealthMedication</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Administered</td>
<td>Status of the scheduled administration of medication</td>
<td>Health &gt; Medication and Service Monitor</td>
<td>Students</td>
<td>Mass Update</td>
<td>Administered</td>
</tr>
<tr>
<td>Med Procedure</td>
<td>Medical procedures administered by school personnel</td>
<td>Health &gt; Health</td>
<td>Medications</td>
<td>Current Procedures</td>
<td>Procedure</td>
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# Chapter 2: Lookup Table Setup

## Lookup Table: K12.HealthMedication

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<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>K12.HealthMedication</td>
<td>Medication or services that are administered to students by school personnel</td>
<td><strong>Health &gt; Health</strong></td>
<td>Medications</td>
<td>Current Medications – Click Add</td>
<td>Medication</td>
</tr>
<tr>
<td>Medication Type</td>
<td>Type of medication administered as in over-the-counter, controlled, prescribed</td>
<td><strong>Health &gt; Health</strong></td>
<td>Medications</td>
<td>Medication Taken at Home, Medications Taken at Home</td>
<td>Medication Type</td>
</tr>
<tr>
<td>Route of Administration</td>
<td>Method the medication is administered</td>
<td><strong>Health &gt; Health</strong></td>
<td>Medications</td>
<td>Current Medications</td>
<td>Route of Admin</td>
</tr>
</tbody>
</table>

## Lookup Table: K12.HealthScreen

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<tr>
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<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>K12.HealthScreen</td>
<td>Devices used to aid the student’s hearing</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Hearing</td>
<td>Audio Detail, Audio Detail tab, Right Ear section</td>
<td>Right Aid</td>
</tr>
<tr>
<td>Audio Folder</td>
<td>Folders used to store the audio screen results</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Hearing</td>
<td>Audio Detail, Audio Detail tab, Left Ear section</td>
<td>Left Aid</td>
</tr>
<tr>
<td>Audio Screen Reason</td>
<td>Reasons for audio screening</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Hearing</td>
<td>Audio Detail, Audio Detail tab</td>
<td>Folder</td>
</tr>
<tr>
<td><strong>Audiology Decibels</strong></td>
<td>Decibel values for audiology results. This table is necessary if you select Display Audiology Decibels for hertz testing results within District Health Options</td>
<td><strong>Health &gt; Setup &gt; District Health Options</strong></td>
<td>Options</td>
<td>Audio Detail Options</td>
<td>Default Value for Testing Value</td>
</tr>
<tr>
<td></td>
<td><strong>Health &gt; Health Screen</strong></td>
<td><strong>Health &gt; Health Screen by Section</strong></td>
<td>Hearing</td>
<td>Audio Exam Detail, Audio Detail tab, Right Ear and Left Ear sections</td>
<td>500hz, 1000hz, 2000hz, 4000hz, 8000hz</td>
</tr>
<tr>
<td>Color Deficiency</td>
<td>Possible color blindness conditions or a pass/fail list indicating if the student passed the color deficiency test</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Vision</td>
<td>Vision Detail, Vision Detail tab</td>
<td>Color Deficiency</td>
</tr>
<tr>
<td><strong>Dental Assessment</strong></td>
<td>Reasons a dental exam requirement is waived</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Dental</td>
<td>Dental</td>
<td>Waiver</td>
</tr>
<tr>
<td>Immittance Class</td>
<td>Overall results of the hearing exam</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Hearing</td>
<td>Audio</td>
<td>Left Result and Right Result</td>
</tr>
<tr>
<td>Meds Prescribed</td>
<td>Medications prescribed or a list of the status of a prescription</td>
<td><strong>Health &gt; Health Screen</strong></td>
<td>Tuberculosis</td>
<td>Tuberculosis Medication</td>
<td>Medication Prescribed</td>
</tr>
</tbody>
</table>
### Lookup Table Setup

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Referral</td>
<td>External agency where the student was referred to or the source of a referral for a hearing screening</td>
<td>Health &gt; Health Screen</td>
<td>Hearing</td>
<td>Audio</td>
</tr>
<tr>
<td>Tb Disease Status</td>
<td>Current status of the TB patient, such as <em>free from communicable tuberculosis</em> or <em>not free from communicable tuberculosis</em></td>
<td>Health &gt; Health Screen</td>
<td>Tuberculosis</td>
<td>Tuberculosis Medication</td>
</tr>
<tr>
<td>Tt Waiver</td>
<td>Reasons a tuberculosis test is waived</td>
<td>Health &gt; Health Screen</td>
<td>Tuberculosis</td>
<td>Tuberculosis Skin Test</td>
</tr>
<tr>
<td>Treatment Urgency *</td>
<td>Follow-up treatments based on the results of the dental exam</td>
<td>Health &gt; Health Screen</td>
<td>Dental</td>
<td>Dental</td>
</tr>
<tr>
<td>Tympanogram Type</td>
<td>Results of a test with a tympanometer</td>
<td>Health &gt; Health Screen</td>
<td>Hearing</td>
<td>Right Ear and Left Ear</td>
</tr>
<tr>
<td>Vision Aid</td>
<td>Corrective lenses used by the student to correct their vision</td>
<td>Health &gt; Health Screen</td>
<td>Vision</td>
<td>Vision Detail, Vision Detail tab</td>
</tr>
<tr>
<td>Vision Screen Reason</td>
<td>Reasons a student received a vision exam, such as <em>annual exam</em>, referred by teacher, referred by parent</td>
<td>Health &gt; Health Screen</td>
<td>Vision</td>
<td>Vision Detail, Vision Detail tab</td>
</tr>
</tbody>
</table>

### Vaccination Sis Code *

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccination codes used in previous SIS software</td>
<td>Health &gt; Setup &gt; Immunization Definition</td>
<td>Immunization Definition</td>
<td>Immunizations Detail, Other tab, State &amp; SIS Code section</td>
<td>Sis Code</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccination codes used in state reporting (state-specific)</td>
<td>Health &gt; Setup &gt; Immunization Definition</td>
<td>Immunization Definition</td>
<td>Immunizations Detail, Other tab, State &amp; SIS Code section</td>
<td>State Code</td>
</tr>
</tbody>
</table>

### Exemptions *

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccination exemption reasons for printing on the HLT403 report</td>
<td>Health &gt; Health</td>
<td>Immunizations</td>
<td>Immunizations Detail, Student Dosage tab, Exemption, Compliance Override and Comment section</td>
<td>Exempt</td>
</tr>
</tbody>
</table>
Adding Alt Codes for Health Type of Record (Arizona)

The HLT212 – Arizona Immunization Report uses the Health Type of Record table. You must set this table up with the following values for the HLT212 report to work correctly.

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.
3. Verify that the table has the following codes in the **Alt Code 3** column.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Alt Code 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Arizona Lifetime Record</td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td>Out-of-State Record</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Other Immunization Record</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Foreign Country</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Asiis</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Provider Record</td>
<td>5</td>
</tr>
</tbody>
</table>

4. Click Save.

Adding Alt Codes for Administered Medications

In order to report correctly, the code used to indicate that medication was given must have an **Alt Code 3** value of 0. The code used to indicate an adjustment in the amount of medication kept by the school must have an **Alt Code 3** value of 3.

1. Navigate to **Synergy SIS > System > Setup > Lookup Table Definition**.

3. Verify that the table has the appropriate codes in the **Alt Code 3** column.
4. Click Save.
Adding Alt Codes for Dental Assessment

The HLT618 – Oral Health Assessment and Waiver Report uses the Dental Assessment tables. You must set up these tables with the following values for the HLT68 report to work correctly.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
3. Verify that the table has the following codes in the Alt Code 3 column.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Alt Code 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Lack of access to insurance</td>
<td>2</td>
</tr>
<tr>
<td>1</td>
<td>Financial burden</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Parental consent</td>
<td>3</td>
</tr>
<tr>
<td>3</td>
<td>Form not returned</td>
<td>4</td>
</tr>
</tbody>
</table>

4. Click Save.

Adding Alt Codes for Treatment Urgency

The HLT618 – Oral Health Assessment and Waiver Report uses the Treatment Urgency. You must set up these tables with the following values for the HLT618 report to work correctly.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
3. Verify that the table has the following codes in the Alt Code 3 column.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Alt Code 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>No obvious problem</td>
<td>1</td>
</tr>
<tr>
<td>1</td>
<td>Early dental care recommended</td>
<td>2</td>
</tr>
<tr>
<td>2</td>
<td>Urgent care needed</td>
<td>3</td>
</tr>
</tbody>
</table>

4. Click Save.
Adding Alt Codes for Exemptions

You must add Alt Codes for exemptions for extracts and reports to display the appropriate exemption data.

1. Navigate to Synergy SIS > System > Lookup Table Definition.

3. Verify that the table has the following codes in the Code, State Code, and Alt Code 3 column.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State Code</th>
<th>Alt Code 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exempt</td>
<td></td>
<td>E</td>
<td></td>
</tr>
<tr>
<td>MRP</td>
<td>Medical Reasons</td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>MRT</td>
<td>Medical Reasons Temporary</td>
<td>MT</td>
<td>MT</td>
</tr>
<tr>
<td>P</td>
<td>Personal Beliefs</td>
<td>P</td>
<td>R</td>
</tr>
<tr>
<td></td>
<td>Personal Temporary</td>
<td>PT</td>
<td></td>
</tr>
<tr>
<td>IU</td>
<td>Immunity to Mumps</td>
<td>MU</td>
<td></td>
</tr>
<tr>
<td>IR</td>
<td>Immunity to Rubella</td>
<td>IR</td>
<td></td>
</tr>
<tr>
<td>IM</td>
<td>Immunity to Measles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>POX</td>
<td>Had Chicken Pox</td>
<td>HD</td>
<td></td>
</tr>
<tr>
<td>HIS</td>
<td>Disease History</td>
<td>HIS</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td>O</td>
<td></td>
</tr>
<tr>
<td>Disease</td>
<td></td>
<td>D</td>
<td></td>
</tr>
</tbody>
</table>

4. Click Save.

Make sure the students with exemptions have the defined exemption codes applied in their individual Synergy SIS > Health > Immunizations record.
Adding Audiology Decibels

This table allows you to define the decibels for the audiology results. You can edit the default values in this table to contain the necessary measurement values. This table is necessary if you select Display Audiology Decibels for Hertz testing results within District Health Options.

The values in this table affect the options available within District Health Options and the hearing results within the Health Screen screen, Hearing tab and Health Screen by Section screen, Hearing tab.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
2. Navigate within the Lookup Table Maintenance tree to K12.HealthScreen > Audiology Decibels.

![Audiology Decibels Lookup Table](image-url)
Chapter 3: Immunization Definition Setup

Setting Up Immunization Definition .................................................. 27
Importing & Exporting Immunization Definitions ............................... 51
Securing Delete All Immunization Data ............................................. 53
Setting Up Immunization Definition

After you set up all of the lookup tables, you can define the immunization requirements.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.

2. Select how to verify that immunizations meet requirements in the Validation Type field. Depending on your selection, the available fields vary. The options include:

   - **Dosage Interval Validation on a Sliding Date Scale** – Verifies the number of dosages and the dates of dosages given. See Creating Dosage Interval Validations for next steps.
   - **No Interval Validation** – Only verifies the number of dosages given
   - **Custom Validation Rules** – See Creating Custom Immunization Definitions for next steps.
   - **Manual Validation Status Entry** – Displays additional filtering options on the HLT403 -- Student Immunization Compliance List Report to assist with manual validation
Creating Dosage Interval Validations


![Immunization Definition Screen](Image)

2. Enter the appropriate values in the new row.

   - **Name** – Name of the immunization
   - **Sequence** – Order the immunizations display on the screen, from lowest to highest
   - **Total** – Number of possible dosages
   - **Required** – Minimum number of dosages required. For example, the Polio vaccine required 3 dosages but if the last dosage was not given to the student when he was 4 years old or older, he requires 4 dosages. For polio, the Total dosages would be 4 and the Required dosages would be 3.
   - **Minimum Age for Last Dosage** – If the last dosage of a vaccine must be given at a certain age or older, enter the number and time unit. For example, the last dosage of polio must be given to the student when the student is 4 years or older. For polio, enter 4 and select Year(s).
   - **Continuing Booster Interval** – If the vaccine requires a booster every few years, enter the number and time unit. For example, some states require a Tdap booster every 5 years. For Tdap, enter 5 and select Year(s).
   - **Gender** – Select if this immunization is gender specific
   - **Booster** – Select if this immunization is a booster shot

3. Click **Save**.

4. Repeat the process to add all the appropriate immunizations.
Adding Dosage Interval Validation Details

Some immunizations have more detailed requirements.

1. Select an immunization definition from the Immunization grid.

2. Click Show Detail. The immunization detail tabs display. The Dosages, Continuing Booster Interval, and Gender sections contain the same information on the main part of the screen. The Age and Interval of the Minimum Age for Last Dosage also contains the same information on the main part of the screen.

![Immunization Definition Screen, Immunizations Detail]

3. Enter the Superceding Dosage, if the student did not meet the minimum age for last dosage requirement but can meet the requirement by taking a different number of dosages. For example, if a student was younger than 4 years when she received her last polio dosage, she can still meet the requirement if she has 4 dosages instead of 3.
4. Enter the Max Age and Interval, if the student has to complete the final dosage of the immunization requirement by a certain age. For example, some states require students to receive a varicella vaccination before they turn 13. For the varicella vaccination, enter 13 in the Max Age field and select Year(s) from the Interval field. Max Age does not work unless you also enter a minimum age.

![Immunization Definition Screen, Immunizations Detail]

The Dosages grid outlines the recommended schedule of dosages needed for the immunization. If all other requirements are met, the student displays compliant if their dosages do not match this schedule.

A blank line displays for each possible dosage entered in the Total field. All dosage periods are based on the student’s birth date as entered in the Student screen. The Grace Period is the permissible time before the scheduled dosage when the student may still receive the vaccine.

5. **Click Save.**
Setting Grade Level-Specific Immunization Requirements

Sometimes, as new immunization requirements are phased in, some vaccines are only required for certain grade levels. For example, in some states the meningococcal vaccine is only required for 6th and 7th grade students.

1. Select an immunization definition from the Immunization grid.
2. Click Show Detail. The immunization detail tabs display.
3. Select the Grade Requirements tab.

4. In the Grade Level Requirements grid, enter the required number of dosage for each grade in the Dosage column.
5. In the Minimum Age for Last Dosage column, enter the age for the appropriate grade if the last dosage of a vaccine must be given at a certain age or older.
6. In the Superceding Dosage column, enter the number of dosages that overrides the minimum age requirement if the student did not meet the minimum age for last dosage but can still meet the requirement by taking a different number of dosages.
7. Enter the appropriate year and interval if the vaccine requires additional boosters periodically in the Continuing Booster column.
8. Click Save.
Creating Immunization Groups

For immunizations with varying requirements across ages and grades, you might need to separate the requirements into two immunization definitions to capture all of the requirements needed. Then, you can group the definitions together to capture the overall compliance with the requirements.

For example, the requirement for the varicella vaccine in some states is 1 dosage if it is given to the student before he is 13, or 2 dosages if the first dosage was given at 13 years of age or later. Enter the vaccination requirement in the Immunizations grid in two or more separate requirements. In this example, enter the Varicella requirements as one requirement for students younger than 13 and one requirement for students 13 years or older.

After entering the requirements, you can create a group to ensure the student met one of the requirements.


2. In the Group Name column, enter the overall name for the requirement.

3. Select the Group Type. Options include:
   - Individually – Student is compliant if she meets one of the individual requirements in the group. For example, with the varicella requirement, the student can meet either the requirement for students who received the vaccine prior to age 13 or the requirement for students who took the vaccine at age 13 or older.
   - Combined – Dosages taken for each requirement can substitute for each other in the grouping. For example, a student must take 4 dosages of either the DTaP, DTP, or DT
vaccine. You could list each vaccine separately and, if the student takes a combined total of 4 of the 3 types of vaccines, she is compliant.

- **Merge Data Type** – Merges the definitions on the Immunizations tab of the Health screen so that only one line appears for all of the definitions in the group. If there is already data entered for the definitions, Synergy SIS cannot merge them. Synergy SIS still monitors the individual definitions for compliance and they still appear separately on the Immunization Definition screen. This works best for vaccines such as varicella, where each definition references the same vaccine but the requirements are different either by age or by grade.

4. Click **Save**.
5. Select an immunization group from the Immunization Groups grid.
6. Click **Show Detail**. The immunization group details display.

7. Select the definition to include in the group.
8. Click **Save**.
Defining State Vaccination and Former SIS Codes

If you need to upload vaccination information to the state, you must first map each definition to a state vaccination code. You must also map each definition to a SIS code Synergy SIS can use to convert data from a previous student information system.

1. Select an immunization definition from the Immunization grid.
2. Click Show Detail. The immunization detail tabs display.
3. Select the Other tab.

![Immunization Definition Screen, Immunizations Detail, Other Tab](image)

4. Select the State Code. State codes vary by state.
5. Select the SIS Code.
6. Select the Show Label option.
7. Enter the new name of the column in the Label field. This changes the Comment column, which displays on the detail tab when you select a definition on the Immunizations tab of the Health screen.
8. Click Save.
Disabling Immune Selection for Immunization

If a student had a particular illness, such as chickenpox, he is immune and does not require additional immunization. For these students, you select *Immune* as the Exempt status for the associated immunization. However, there are some illnesses that you cannot naturally acquire immunity to, such as polio. For these illnesses and their associated immunizations, you can disable *Immune* in the Exempt field.

1. Select an immunization definition from the Immunization grid.
2. Click Show Detail. The immunization detail tabs display.
3. Select the Other tab.

![Immunization Definition Screen, Immunizations Detail, Other Tab](image)

4. Select Disable Immune.
5. Click Save.
Creating Custom Immunization Definitions

Some school districts require customized definitions for their immunizations to capture all of the requirements needed. The Immunization Definition screen enables you to create custom rules to validate that students are compliant with their immunizations.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.

![Immunization Definition Screen, Immunizations Definition Tab]
2. Select the *Custom validation rules* option in the *Validation Type* field.

![Immunization Definition Screen](image)

> When you select *Custom validation rules*, previously defined immunizations, sequences, and total dosages appear.

3. Select an immunization from the Immunization grid and click the *Show Definition* link. The Immunization Rule Definition screen displays.

4. Select the primary node under the Rule Tree. The Rule Properties tab displays.

![Immunization Rule Definition Screen](image)

5. Populate the fields on the *Rule Properties* tab.
   - **Description** – Description of the validation rule
   - **Disable Validation** – Select this option to disable this validation rule
   - **Disable Message** – Message displayed when the validation is disabled
   - **Only assess doses with valid interval spacing** – Activates the rule pre-validation using the Dosage Intervals
Other vaccine doses to include in assessment – Allows other vaccine dosages to be included for validation. When assessed, another vaccine can be used to evaluate valid dosages to determine compliance.

6. Select Add Condition to (primary node) from Actions.... The Vaccination Condition Definition screen opens.

A node can have only one Condition and multiple Actions.

Synergy SIS creates a True and a False node when you define a condition. Each True or False node can have one condition defined and many actions.

7. Select the condition type in the Type field. The Types available are:

- Interval Between Dosages – Sets an interval of time between two dosages. The option also features a grace period.
- Student Age Time of Dose – States an age interval for a given dosage. This option has a grace period.
- All Dosage Dates Condition – Sets a specific message if a dosage date for the immunization equals the value entered
- All Dosage On Or After Birthday – Sets a specific message if not all dosages have been entered on or after the student’s date of birth
- At Least 1 Dose After Age – Sets that a student must have at least one dosage in any immunization after the time frame entered. This option also features a grace period.
- Dosage Date – Allows a dosage interval to be set based upon the date of evaluation. The date of evaluation is the current date. This option also features a grace period.
- Dosage Exists – States the dosage exists
- Student Age Today – Defines the age interval used in evaluation. The date of evaluation is the current date. This option has a grace period.
- Student Gender – Indicate the gender that receives the immunization
- Student Grade Level – Defines the Grade condition a student must meet
• **Total Doses Received** – Sets the total dosages received (including early dosages) that must be present at the time of evaluation.

• **Vaccination Compliance** – Used to set the compliance of another series. This is comparable to the Immunization Groups.

• **Other Vaccination Compliance** – Allows one series of immunizations to force compliance for another. For example, if DTAP and TDAP are listed separately, this condition could be used to show the TDAP is compliant if DTAP is compliant and no dates are present for TDAP.

• **X Number of Dosages In Separate Month** – Sets a message if more than the specified number of dosages is entered in the same month for the same immunization.

8. Enter the condition details in the appropriate fields. (The fields displayed vary based on the condition type selected.)

- **Description** – Text in this field overrides the system-generated description
- **Dosage #** – Specific dosage within a series of dosages
- **Vaccination** – Specific vaccination
• **Condition** – Determines how to calculate the interval
  - *Equal*
  - *Greater*
  - *Greater than or Equal*
  - *In (Include)*
  - *Less*
  - *Less than or Equal*

• **Amount** – Value used with the Qualifier and Condition

• **Age** – Specified age of a student used in calculations

• **Value** – Specific grade value used with the Student Grade Level condition
  - *Qualifier*
  - *Day(s)*
  - *Month(s)*
  - *Year(s)*

• **Date** – Specified date a condition must meet

• **Message** – Text entered display on the Student dosage status and the Vaccine status

• **Compliance**
  - *Compliant*
  - *Exempt*
  - *Not Compliant*
  - *Not Required*
  - *Up to Date*

2. Click **Save**. The condition and the **True** and **False** nodes appear under the main node on the Rule Tree.
3. Select the False node.

4. Add a condition or an action.
   - Select the Add Condition to ‘False’ option from the Actions... menu. The Vaccination Condition Definition screen opens. Follow steps 5-8 outlined above to add a condition.
   - Select Add Action to ‘False’. The Vaccination Action Definition screen opens. Follow the steps below to add an action.

5. Select the action type in the Type field. The Types available are:
   - Set Dosage Due Date – Defines the interval between dosages. As an example dosage #2 due 2 months after dosage #1 received.
   - Set Dosage Status – Sets a specific dosage with a specific result and message. As an example, dosage #2 set to Not Compliant and the message set to Incomplete.
   - Set Other Vaccination Compliance – Sets the series of immunizations to force compliance for another. For example, if DTAP and TDAP display separately, you can use this condition to show the TDAP is compliant if DTAP is compliant and no dates are present for TDAP.
   - Set Vaccination Compliance – Sets a specific vaccination to a specific result and message.

6. Enter the condition details in the appropriate fields. (The fields displayed vary based on the condition type selected.)
   - Description – Text in this field overrides the system-generated description
   - Dosage # – Specific dosage within a series of dosages
   - Vaccination – Specific vaccination
   - Amount – Value used with the Qualifier and Condition
Chapter 3: Immunization Definition Setup

- **Qualifier**
  - Day(s)
  - Month(s)
  - Year(s)

- **Result**
  - Compliant
  - Exempt
  - Insufficient
  - No Record
  - Not Compliant
  - Not Required
  - Up to Date

- **Message** – Text entered display on the Student dosage status and the Vaccine status

![Vaccination Action Definition Screen](image1)

7. Click Save. The action appears under the **False** node.

![Immunization Rule Definition Screen](image2)

8. Continue to add conditions and actions under the appropriate nodes as needed to complete the immunization compliance definition.
Adding Custom Instructions/Info to Report Footers

Some health reports can include custom text in the footer of the report. At the bottom of the Student Immunization Report (HLT202), the district can add custom instructions or information.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Immunization Report Settings tab.

3. Enter the footer text to display in the Immunization Profile Text field.
4. Click Save.
Adding an Exclusion Date

An exclusion date is the day by which students must be compliant in all their immunizations or have an exemption reason on file.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Immunization Report Settings tab.
3. Enter a value in the Exclusion Days (from mailing date) field.

   The Exclusion Days (from mailing date) is set to the current date plus the number specified. The default value is 14. For example, if the current date is 1/10/2017 and the field is set to 14, the Exclusion Date is 1/24/2017. You can override the Exclusion Days (from mailing date) by the Exclusion Date field on the HLT215 and HLT216 report interfaces.

4. Click Save.

Setting Vaccination Rule Options

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Options tab.
3. Select the following options:
   - Use Birth Month When Validating Student Age Conditions – If a vaccination has a condition related to the student’s birthdate or age, the system validates the vaccination if given during the birth month, rather than on the actual birthday.
   - The Number of Days in a Month – Number of days that Synergy SIS uses to define a month in order to determine if an immunization is compliant. If there is no entered value, the system uses the average of 30.4 days in a month.
● Default Parent Signature to True – See Retaining Parents’ Signatures on File
● Do Not Include Parent Signature in Assessment – Synergy SIS does not require a parent’s signature on file in order to validate a student’s immunization record
● Exemptions Are Valid Without an ‘Exemption Granted’ Date – Synergy SIS does not require you to enter an Exemption Date when you select an Exemption Granted value on the Immunization tab of the Health screen.

![Health Screen, Immunization Tab](image)

● Disable Dosage Validation – Synergy SIS does not validate the dosages based on the conditions associated with the immunization. This allows you to enter vaccination dates in any order. You can also enter dosages before the student’s birthday even if the birthday related condition is set.

If you select Disable Dosage Validation, you must run the Update Dosage Number for All Student Dosages process.

1. Select Update Dosage Number For All Students from the Menu on the Immunization Definition screen. A confirmation message displays when the process completes.
2. Click OK to dismiss the confirmation message.

● Invalid Dates Message – See Customizing Message for Insufficient Records
Retaining Parents' Signatures on File

You can set the system to indicate that a parent or guardian’s signature is on file every time someone creates a new immunization record.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Options tab.
3. Select Default Parent Signature to True.

4. Click Save.
Customizing Message for Insufficient Records

The message that displays when immunization records has invalid dates is customizable on the Options tab of the Immunization Definition screen. You can make this message as general or specific as needed.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Options tab.
3. Enter the appropriate message in the Invalid Dates Message field.

4. Click Save.
Setting Grade Level Validation

You can set validation conditions for immunizations that check a student’s grade level. You can also designate that Synergy SIS can look at the local code (Code column) or the state code (State Code column) in the Grade Lookup table to determine the appropriate grade level.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Options tab. The Grade level validation currently uses field indicates which code the system is currently checking.
3. Click Switch validation to use STATE CODES and convert existing rule values to toggle between the local and state code. The system converts the existing rule to use the newly selected values.

If you add a new grade when using local code validation, you need to go into any existing rule to manually add the grade to the rule.

If you add a new grade with an existing state code when using state code validation, the system automatically updates the rules that use the existing state code.
Defining Health Department Information

The system enables you to create letters informing parents and guardians that a student’s immunization records must be compliant by a specified date. These letters contain the local health authority’s contact information and contain a local health authority representative or officer’s signature. Contact your local health authority for the correct information and signature.

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Health Department tab.

![Immunization Definition Screen, Health Department Tab]

3. Enter the required information in the Regional Health Department group box.
   - Department Name
   - Department Officer Name
   - Department Address
   - Department Phone Number

4. Upload a file containing the (authorized) signature of the Regional Health Department Officer in the Signature Image File section.
5. Click Save.
Importing & Exporting Immunization Definitions

You can import immunizations definitions created in Synergy SIS from another school or district. You can also export immunization definitions for use by another school or district. The files imported and exported are in xml format.

The State Codes and Name in Synergy SIS must match the source XML file in order to import properly.

If you import immunization definitions from another Student Information System, please use the generic conversion process. See the Data Conversion manual and the Immunization Definitions spreadsheet. You can select to import or export the immunization definitions either as a group or individually.

Importing/Exporting Definitions as a Group

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select the Import/Export tab.

3. Select the immunization definitions to include in the import or export file.
4. Import or export the definitions.
   - Click Import Definitions.
     a. Find and upload the definitions xml file. Synergy SIS displays an upload confirmation message.
b. Click OK to dismiss the message.
   - Click Export Definitions. The system creates an xml file for you to save.

**Importing/Exporting Definitions Individually**

1. Navigate to Synergy SIS > Health > Setup > Immunization Definition.
2. Select Custom validation rules in the Validation Type field.
3. Select the immunization definition to import or export file.
4. Click Show Definition. The Immunization Rule Definition screen displays.

5. Import or export the rule definitions from the Menu.
   - Select Import Rule Definition.
     a. Find and upload the definition to import.
   - Select Export Rule Definition. The system creates an xml file for you to save.
Securing Delete All Immunization Data

To prevent users from deleting a student’s data, you can secure this menu option.

3. Click Show Detail to secure the desired User Group. The Tab Access grid appears.
4. Select No for Access in Menu – Delete All Immunization Data.

5. Click Save.
Adding State Codes for Vaccinations

State Health reports such as the HLT204 – California School Immunization Report and the HLT212 – Arizona Immunization Report use the Vaccination State Code table.

For the reports to work correctly for Arizona, California, and Oregon, you must set this table up with the appropriate values. After setting up the lookup table, you must map the codes to each vaccination definition as outlined in the next section of this guide.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.

![Vaccination Sis Code Lookup Table](image)
3. Verify that the table has the following codes entered in the State Code column.

**Arizona Vaccination Codes**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Polio</td>
<td>01</td>
</tr>
<tr>
<td>02</td>
<td>Dipth</td>
<td>02</td>
</tr>
<tr>
<td>03</td>
<td>DTTD</td>
<td>03</td>
</tr>
<tr>
<td>04</td>
<td>MMR</td>
<td>04</td>
</tr>
<tr>
<td>05</td>
<td>HIB</td>
<td>05</td>
</tr>
<tr>
<td>06</td>
<td>HEP B</td>
<td>06</td>
</tr>
<tr>
<td>07</td>
<td>HEP A</td>
<td>07</td>
</tr>
<tr>
<td>08</td>
<td>Varicella</td>
<td>08</td>
</tr>
<tr>
<td>09</td>
<td>PCV7</td>
<td>09</td>
</tr>
<tr>
<td>10</td>
<td>TDAP</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>MCV</td>
<td>11</td>
</tr>
<tr>
<td>12</td>
<td>TB Skin Test</td>
<td>12</td>
</tr>
<tr>
<td>13</td>
<td>HPV</td>
<td>13</td>
</tr>
</tbody>
</table>

**California Vaccination Codes**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Polio</td>
<td>01</td>
</tr>
<tr>
<td>02</td>
<td>DT/Td</td>
<td>02</td>
</tr>
<tr>
<td>02A</td>
<td>DTP/DtaP/Tdap</td>
<td>02A</td>
</tr>
<tr>
<td>03</td>
<td>MMR</td>
<td>03</td>
</tr>
<tr>
<td>04</td>
<td>HIB</td>
<td>04</td>
</tr>
<tr>
<td>08</td>
<td>HEP B</td>
<td>08</td>
</tr>
<tr>
<td>09</td>
<td>Hep A</td>
<td>09</td>
</tr>
<tr>
<td>10</td>
<td>Varicella (Chicken Pox)</td>
<td>10</td>
</tr>
</tbody>
</table>
**Oregon Vaccination Codes**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>DTAP</td>
<td>01</td>
</tr>
<tr>
<td>01A</td>
<td>Booster</td>
<td>01A</td>
</tr>
<tr>
<td>02</td>
<td>Polio (IPV or OPV)</td>
<td>02</td>
</tr>
<tr>
<td>03</td>
<td>Varicella</td>
<td>03</td>
</tr>
<tr>
<td>04</td>
<td>MMR</td>
<td>04</td>
</tr>
<tr>
<td>05</td>
<td>Measles</td>
<td>05</td>
</tr>
<tr>
<td>06</td>
<td>Mumps</td>
<td>06</td>
</tr>
<tr>
<td>07</td>
<td>Rubella</td>
<td>07</td>
</tr>
<tr>
<td>08</td>
<td>Hepatitis B</td>
<td>08</td>
</tr>
<tr>
<td>09</td>
<td>Hepatitis A</td>
<td>09</td>
</tr>
<tr>
<td>10</td>
<td>HIB</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>Pneumococcal (PCV7)</td>
<td>11</td>
</tr>
<tr>
<td>12</td>
<td>Meningococcal (MCV4, MPSV4)</td>
<td>12</td>
</tr>
<tr>
<td>13</td>
<td>HPV</td>
<td>13</td>
</tr>
<tr>
<td>14</td>
<td>Influenza</td>
<td>14</td>
</tr>
</tbody>
</table>
### Washington Vaccination Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>State Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>HEPB</td>
<td>02</td>
</tr>
<tr>
<td>03</td>
<td>MMR</td>
<td>03</td>
</tr>
<tr>
<td>05</td>
<td>TDAP</td>
<td>05</td>
</tr>
<tr>
<td>06</td>
<td>VAR</td>
<td>06</td>
</tr>
<tr>
<td>07</td>
<td>MCV</td>
<td>07</td>
</tr>
<tr>
<td>09</td>
<td>HIB</td>
<td>09</td>
</tr>
<tr>
<td>10</td>
<td>HEPA</td>
<td>10</td>
</tr>
<tr>
<td>11</td>
<td>HPV</td>
<td>11</td>
</tr>
<tr>
<td>12</td>
<td>TD</td>
<td>12</td>
</tr>
<tr>
<td>14</td>
<td>DTAP</td>
<td>14</td>
</tr>
<tr>
<td>15</td>
<td>PCV</td>
<td>15</td>
</tr>
<tr>
<td>16</td>
<td>PV (polio)</td>
<td>16</td>
</tr>
</tbody>
</table>

4. Click **Save**.
Chapter 4:
Optional Health Screen Customizations

Setting up Audiology Staff ................................................................. 59
Setting up Audiology Decibels ....................................................... 60
Alternative Accident Details ......................................................... 63
Displaying BMI Details ................................................................. 64
Setting up Audiology Staff

Synergy SIS handles Audiology staff differently than other staff roles.

1. Navigate to **Synergy SIS > Staff > Staff**.
2. Locate the staff member you want to give the Audiology role to.
3. Select the **Audiology** Role Type under Staff Role.

4. Click Save.
The chosen staff member now appears in the Staff Name field on the Health Screen screen.

**Setting up Audiology Decibels**

Within Synergy SIS, you can enter a specific decibel for each hertz used in testing to identify the default value for the overall audio status for each ear.

This setup is optional. Selecting these options enables you to record default values and decibels when using Add Wizard or Show Detail within Health Screen. If you do not set up this option, the default Pass/Fail option remains.

You can also see these changes in HealthVUE.
Enabling Audiology Decibels

These options are available within the Audio Detail Options section of the District Health Options screen. You must enter values in the Audiology Decibels lookup table before you can select them in Default Value for Testing Value.

1. Navigate to Synergy SIS > Health > Setup > District Health Options.
2. Select Display Audiology Decibels for Hertz testing results.

   Selecting this option changes the values for the Default Value for Testing Value, enabling you to select decibels for hertz in place of Pass or Fail.

3. Select the desired Default Value for Testing Value.
If you do not select the Display Audiology Decibels for Hertz testing results, the values for this option are Pass and Fail.

4. Click Save.
Alternative Accident Details

Synergy SIS offers an alternative Health detail screen that provides your users with additional drop-downs for entering accident details. These drop-downs include Accident Location, Activity, Equipment, Injury, and Action Taken. Accident Location describes where the accident took place. Activity describes what activity the individual was taking part in when the accident took place. Equipment identifies any equipment involved with the accident. Injury identifies any injuries sustained by the individual during the accident. Action Taken identifies the actions taken by school officials as a result of the accident.
Enabling the Alternative Accident Details

For these drop-downs to appear on the Health screen, you must enable this alternative view within Synergy SIS.

3. Select HealthIncidentDetailExtended in the View Substitution field.
4. Click Save.

Displaying BMI Details

You can set Synergy SIS to display BMI details for students on the Health Screen.

1. Navigate to Synergy SIS > Health > Setup > District Health Options.
2. Select Show BMI Percentile and/or Show BMI Status.
Selecting the previous options displays these details on the Health Screen under the General Health tab.
Chapter 5: Accident Report and Task Setup

Setting Up the Health Accident Report ................................................. 67
Setting Up the Healthcare Plan Report ............................................... 70
Understanding Health Task Information ........................................... 74
Setting Up the Health Accident Report

The Health Accident Report is a system-generated letter that you send to a student’s parents after an accident occurs. You create a form letter and the system populates it with details of the incident. You can create different types of form letters that vary in detail and can translate into the student’s home or primary language.

Setting up a health accident report consists of three steps. First, you create a mail merge letter using Microsoft Word. Second, create a mail merge definition for the Health Accident Report. Third, attach the letter to the mail merge definition.

Creating a Health Incident Mail Merge Letter

1. Open a new document in any version of Microsoft Word.
2. Write a generic letter informing the parents that their child had an accident.
3. Add the mail merge fields for the information you want the system to populate from the health record.

You must enter field names in the following format:

<<FieldName >>

Common field names are FirstName, LastName, Address, CityStateZipCode, IncidentLocation, IncidentDate, and IncidentTime.

4. Save the letter.

For information about creating a mail merge 1.0 document, see the Synergy SIS – System Administrator Guide.

For information on setting up letters and labels in Mail Merge version 2.0, see the Synergy SIS – Mail Merge 2.0 Guide.
Creating a Mail Merge Definition

You can set the letter for use either at the district level (all schools can access) or at the school level (only that individual school can access.) The process for adding a letter is the same on both screens.

- Use the Mail Merge District Definition screen (Synergy SIS > System > Setup > Mail Merge District Definition) to create letter that all schools can access.

- Use the Mail Merge Definition screen (Synergy SIS > System > Setup > Mail Merge Definition) to create letter for the school in focus only.

1. Click Add on either the Mail Merge District Definition screen or the Mail Merge Definition screen. The Mail Merge District Definition (Add) screen or the Mail Merge Definition (Add) screen opens.

2. Enter a Name for the health accident report.
3. Select the Type.
   - General – Letters or reports
   - Labels – Mailing labels

4. Choose the Default Language.

5. Click the gray link next to the Report Name label.

6. Find and select the HLT203 - Student Health Accident Report.

   In order to use this document as the Health Accident Report, you must select HLT203 - Student Health Accident Report as the Report Name.

7. Select the Mail Merge Version. Typically, this is 1.0.

   For information about creating a mail merge 1.0 document, see the Synergy SIS – System Administrator Guide.
   For information on setting up letters and labels in Mail Merge version 2.0, see the Synergy SIS – Mail Merge 2.0 Guide.

8. Click Save.

Attaching the Letter to the Mail Merge Definition

You can attach multiple documents to one definition, each in a different language.

1. Click Add on the Mail Merge Documents grid. The Choose File to Upload window opens.

2. Browse for and upload the mail merge form letter. Synergy SIS adds the document to the Mail Merge Documents grid.

   Mail Merge Definition Screen

3. Select the document Language.

4. Enter the Revision name or number to track which version of the letter is currently in use, if needed.

5. Click Save.
If you want to delete a document:

1. Click the box in the X column.

2. Click Save.

If you want to delete the entire definition:

1. Delete all attached documents.
2. Click Delete.

Setting Up the Healthcare Plan Report

Typically, students with long term or chronic medical issues have a healthcare plan on record. The Healthcare Plan report is a system-generated letter and report that you send to a student’s parents detailing the plan for the student. Usually, the parent must sign off on the plan before you can implement it.

You create a form letter and the system populates it with details relevant to the student. You can create different types of form letters that vary in detail and can be translated into the student’s home or primary language.

Setting up a healthcare plan report consists of three steps. First, you create a mail merge letter using Microsoft Word. Second, create a mail merge definition for the Healthcare Plan Report. Third, attach the letter to the mail merge definition.
Creating a Healthcare Plan Mail Merge Letter

1. Open a new document in any version of Microsoft Word.
2. Write a generic letter informing the parents that a healthcare plan has been created for their child.
3. Add the mail merge fields for the information you want the system to populate from the health record.

You must enter field names in the following format:

<<FieldName>>

Common field names are FirstName, LastName, Address, CityStateZipCode, IncidentLocation, IncidentDate, and IncidentTime.

May 21, 2015

To the parents of <<First Name>> <<Last Name>>

<<Address>>

<<CityStateZipcode>>

RE: Individual Healthcare Plan

Dear Parent:

This letter is to inform you that an Individual Healthcare Plan has been created to manage your child’s ongoing health issues. If you consent to the plan, please sign and return the attached form. If you would like to have the plan modified or discuss the plan for any reason, please feel free to contact us and we will meet with you at your earliest convenience.

Thank You,

Jane Doe

School Nurse

For information about creating a mail merge 1.0 document, see the Synergy SIS – System Administrator Guide.

For information on setting up letters and labels in Mail Merge version 2.0, see the Synergy SIS – Mail Merge 2.0 Guide.

4. Save the letter.
Creating a Mail Merge Definition

You can set the letter for use either at the district level (all schools can access) or at the school level (only that individual school can access). The process for adding a letter is the same on both screens.

- Use the Mail Merge District Definition screen (Synergy SIS > System > Setup > Mail Merge District Definition) to create letter that all schools can access.

- Use the Mail Merge Definition screen (Synergy SIS > System > Setup > Mail Merge Definition) to create letter for the school in focus only.

1. On either the Mail Merge District Definition screen or the Mail Merge Definition screen, click Add. The Mail Merge Definition (add) screen displays.
2. Enter a Name for the individual healthcare plan report.
3. Select the Type.
   - *General* – Letters or reports
   - *Labels* – Mailing labels
4. Choose the Default Language.
5. Click the gray link next to the Report Name label.
6. Find and select the HLT213 – Student Nurse Plan.

In order to use this document as the Individual Healthcare Plan Report, you must select HLT213 - Student Nurse Plan as the Report Name.

7. Select the Mail Merge Version. Typically, this is version 1.0.

8. Click Save.

See Attaching the Letter to the Mail Merge Definition for instructions on attaching the letter to the Mail Merge Definition.
Understanding Health Task Information

Tasks in Synergy SIS provide to-do lists on the home page. For example, a task might remind a school nurse when to administer medication to a student.

Some of the health related tasks that the system displays include:

- Follow-ups to student health incidents as defined by the End Date of the Accident Detail tab of the Health Log - Nurse tab on the Health screen
- Medication and procedures as scheduled on the Medications tab of the Health screen

The system generates tasks once each day by a process run through the Job Queue on the process server. You can also run the task process manually. For more information on turning on the task process and scheduling when the process runs, please see the *Synergy SIS – System Administrator Guide*.

The tasks for the Medication and Service Monitor screen are called Procedures and Medications.

If the tasks already ran on schedule, running the processes immediately can create duplicate tasks. Do not select Generate Task for Entire Day to only add the new tasks.

Customizing the Medication Monitor

Displaying “As Needed” Medication on Medication Monitor

You can choose to hide or display PRN (as needed) medication on the Medication Monitor.

1. Navigate to *Synergy SIS > Health > Setup > District Health Options*.
2. Select Display all PRN medication on Medication Monitor to display “as needed” medications. Leaving this unselected hides "as needed" medications from the Medication and Service Monitor.
3. Enter a value in the Number of days to retain unprocessed health medical tasks field, if desired. This field defaults to blank. When blank, the current function of removing any Medication or Procedure records from the Medication and Service Monitor screen that have a
blank Administered By field remains. You can retain a maximum of 30 days to remain aligned with the History tab maximum days to display.

4. Click Save.
Hiding Student Photos on Consecutive Lines

This option suppresses the photo for students with consecutive, uninterrupted records, however, the name and ID of the students still display.

1. Navigate to Synergy SIS > Health > Setup > District Health Options.

2. Select Suppress Student Photo on Consecutive Lines in Medication Monitor to hide the student photo. Leave it unselected to show the student photo on consecutive lines.

3. Click Save.
Scheduling a Student with an ADA/ADM Value

You can schedule a student with an ADA/ADM value other than concurrent or blank on the Medication and Service Monitor and related Tasks.

The lookup table **K12 > Enrollment > Exclude ADA ADM** provides the available ADA/ADM choices and can vary from state to state. The concurrent and blank types are not listed because they are included by default.

1. **Navigate to Synergy SIS > Health > Setup > District Health Options.**
2. **Select an ADA/ADM type to include a student with that type in the Medication and Service Monitor.** A student with a concurrent or blank ADA/ADM type is still included as this is current functionality.

3. **Click Save.**
Chapter 6:
Display Health Comments and Documents

Set up Display Health Comments and Display Documents ............79
Track and Prevent Unauthorized Changes in Health Comments ....85
Set up Display Health Comments and Display Documents

The Private tab on the Health screen allows documents and comments to travel with the student from school to school within the district. You can also filter them to show only current school and current year or all schools and all years.

You can apply security to certain document categories on the Private tab of the Health screen. See the Synergy SIS – Security Administrator Guide for more information.
Security Definition Setup

2. Navigate to K12 > SystemInfo > User.
3. Select the Group Property Access tab.
4. Select the line of the appropriate User Group Name.
5. Click Show Detail.

6. For DisplayComments, select None, Update, or View in the Update column.
7. For DisplayDocuments, select None, Update, or View in the Update column.

8. Click Save.
9. Navigate to **K12 > SystemInfo > User Groups**.
10. Select the **Group Property Access** tab.
11. Select the line of the appropriate **User Group Name**.
12. Click **Show Detail**.

![Security Definition Screen, Group Property Access Tab](image)

13. For **DisplayComments**, select **None**, **Update**, or **View** in the **Update** column.
14. For **DisplayDocuments**, select **None**, **Update**, or **View** in the **Update** column.

![Security Definition Screen, Group Property Access Tab, Permissions Detail](image)

15. Click **Save**.
Chapter 6: Display Health Comments and Documents

The filters display from most restrictive to least restrictive. When multiple User or User Groups have competing settings, Synergy SIS uses the most restrictive setting. When User and User Groups have competing settings, User outweighs User Groups.

User Security Settings

The User Security Settings tab allows for filtering of comments and documents.

1. Navigate to Synergy SIS > System > User > User.
2. Select the Security Settings tab.
3. Select the desired option in Display Health Comments.

The Staff Name is read-only for all years except the currently selected focus year. The Organization name is read-only and cannot be changed as Synergy SIS adds it at the time it creates the record. However, you can edit the comment date and the comment as these can be protected via Security Definition.
4. Select the desired option in Display Documents.

5. Click Save.
User Groups Security Settings

The User Group Security Settings tab allows for filtering of comments and documents.

1. Navigate to Synergy SIS > System > User > User Groups.
2. Select the Security Settings tab.
3. Select the desired option in Display Health Comments.
4. Select the desired option in Display Documents.
5. Click Save.
Track and Prevent Unauthorized Changes in Health Comments

You can restrict editing and deleting of a private health comment to only the user who created the comment.

Restricting Health Comment Changes

1. Navigate to Synergy SIS > Health > Setup > District Health Options.
2. Select Restrict the ability to edit or delete private health comment to the user that created the comment in the Other Info section.

With this option enabled, the Staff name defaults to yours when adding records via Add or Add Wizard. If you attempt to select a name other than your own or to edit or delete a comment that you did not create, Synergy SIS displays the following error message and does not save the record.

Only users assigned the Health role can add private comments with this option selected.
Chapter 7: Security

Security Overview ........................................................................................................ 87
Health Security ............................................................................................................ 88
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 chapter outlines the security location for each of the screens within Security Definition.

While the Security Definition screen contains report security options, Edupoint recommends that users only secure reports through PAD Security.

See the Synergy SIS – Security Administrator Guide for more details regarding security definitions.
## Health Security

<table>
<thead>
<tr>
<th>Screen</th>
<th>PAD Location</th>
<th>Tab</th>
<th>Grid/Pop-Out Screen</th>
<th>Field</th>
<th>Security Node</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Log - Nurse</td>
<td>Health</td>
<td>All</td>
<td>All</td>
<td>K12.HealthInfo.HealthIncident</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Clinical Code on the Entries Detail, Log tab</td>
<td>All</td>
<td>K12.HealthInfo.StudentClinicalCodes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Contact Log tab on the Entries Detail</td>
<td>All</td>
<td>Revelation.RevPersonContact</td>
<td></td>
</tr>
<tr>
<td>Health Conditions</td>
<td>Health</td>
<td>All</td>
<td>All</td>
<td>K12.HealthInfo.HealthConditions</td>
<td></td>
</tr>
<tr>
<td>Immunizations</td>
<td>Health</td>
<td>Immunizations</td>
<td>All</td>
<td>K12.HealthInfo.StudentVaccinationGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Dosage Data</td>
<td>All</td>
<td>K12.HealthInfo.StudentVaccinationQuickDataEntryGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Set Exemption And Compliance</td>
<td>All</td>
<td>K12.HealthInfo.StudentVaccinationUnbound</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Immunization Record Data</td>
<td>All</td>
<td>K12.HealthInfo.HealthImmunizationData</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Student Dosage on the Immunizations Detail</td>
<td>All</td>
<td>K12.HealthInfo.StudentDosageGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Health</td>
<td>Exemption, Compliance Override, and Comments on the Immunization Detail</td>
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<td>K12.HealthInfo.StudentDosageDetail</td>
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