



# Synergy MTSS

MTSS Workflow

**Edupoint**<sup>®</sup>

 **Synergy**<sup>®</sup>  
Education Platform

# Purpose/Agenda

Today we will be learning the Pieces of *MTSS Workflow*:

- Workflow Dashboard
  - Adding a new MTSS Components
  - Adding Dashboard graphs/charts
  - Configuring graphs/charts with Group By Options
- Student Search Tab
  - How to search a student
  - How to sort/search through a student's MTSS Components
- Request for Support Tab
  - Adding a Request for Support
  - Updating the Status of a Request
- Progress and Outcome Tabs
  - Identifying open and closed MTSS Plans and CICO enrollments

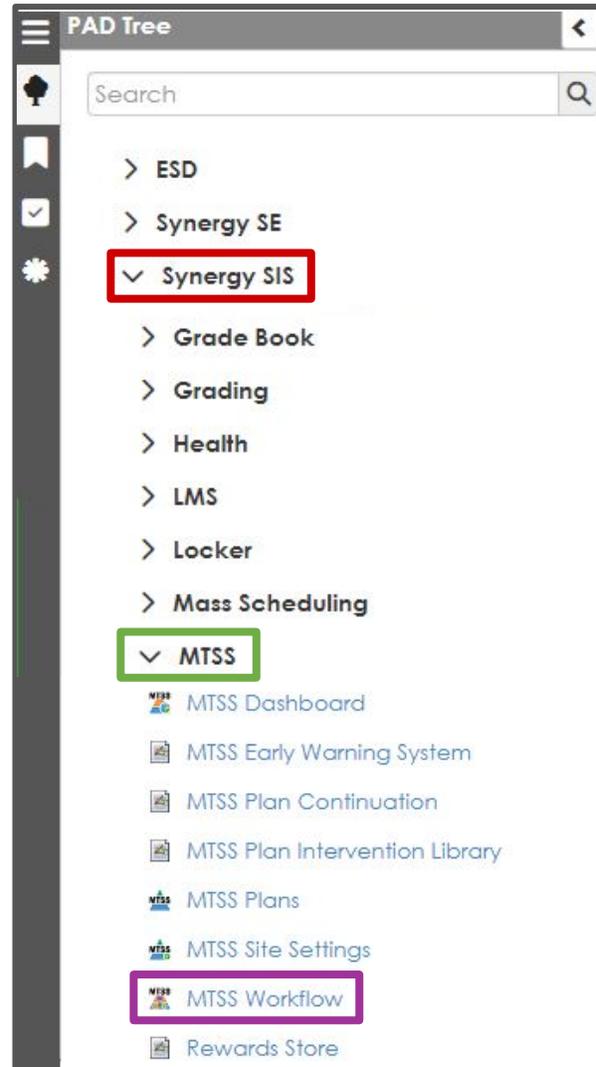
The purpose of this training is to learn how to utilize all of the features provided through the MTSS Workflow.

# MTSS Workflow

First, Navigate to the MTSS Workflow

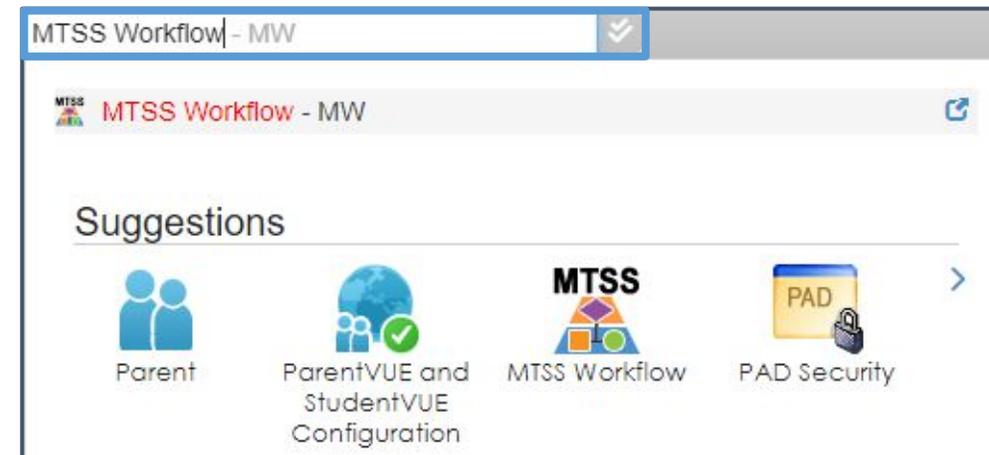
## PAD Tree

1. Select **Synergy SIS**
2. Select **MTSS**
3. Select **MTSS Workflow**



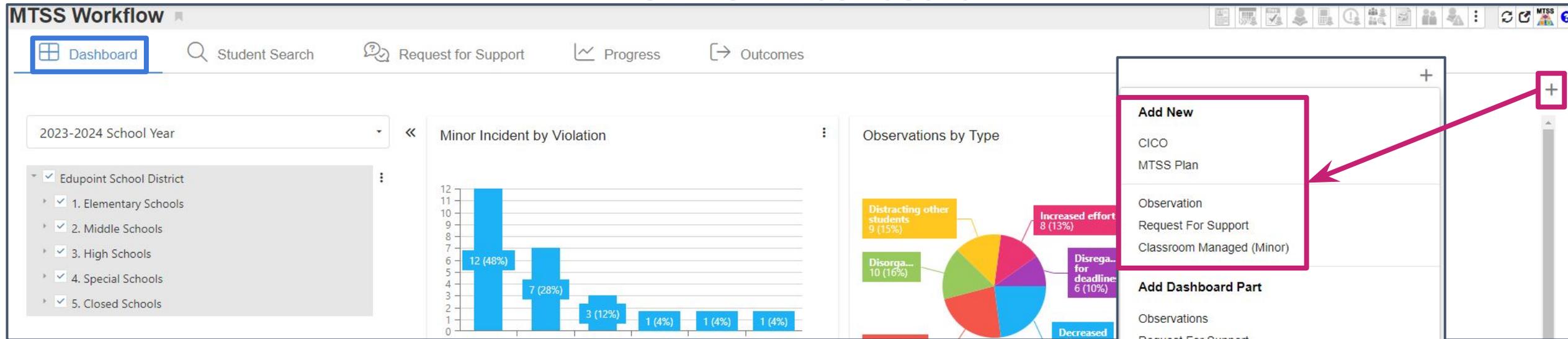
## Quick Launch

1. Type MTSS Workflow into the Quick Launch.



# MTSS Workflow

## Workflow Dashboard



## Adding New MTSS Components

1. Click the + in the right hand corner of the screen.
2. From here, you can create a new...
  - CICO
  - MTSS Plan
  - Observation
  - Request for Support
  - Classroom Managed (Minor) Incident

# MTSS Workflow

## Workflow Dashboard

MTSS Workflow

Dashboard Student Search Request for Support Progress Outcomes

2023-2024 School Year

Edupoint School District

- 1. Elementary Schools
- 2. Middle Schools
- 3. High Schools
- 4. Special Schools
- 5. Closed Schools

Add New

- CICO
- MTSS Plan
- Observation
- Request For Support
- Classroom Managed (Minor)

Add Dashboard Part

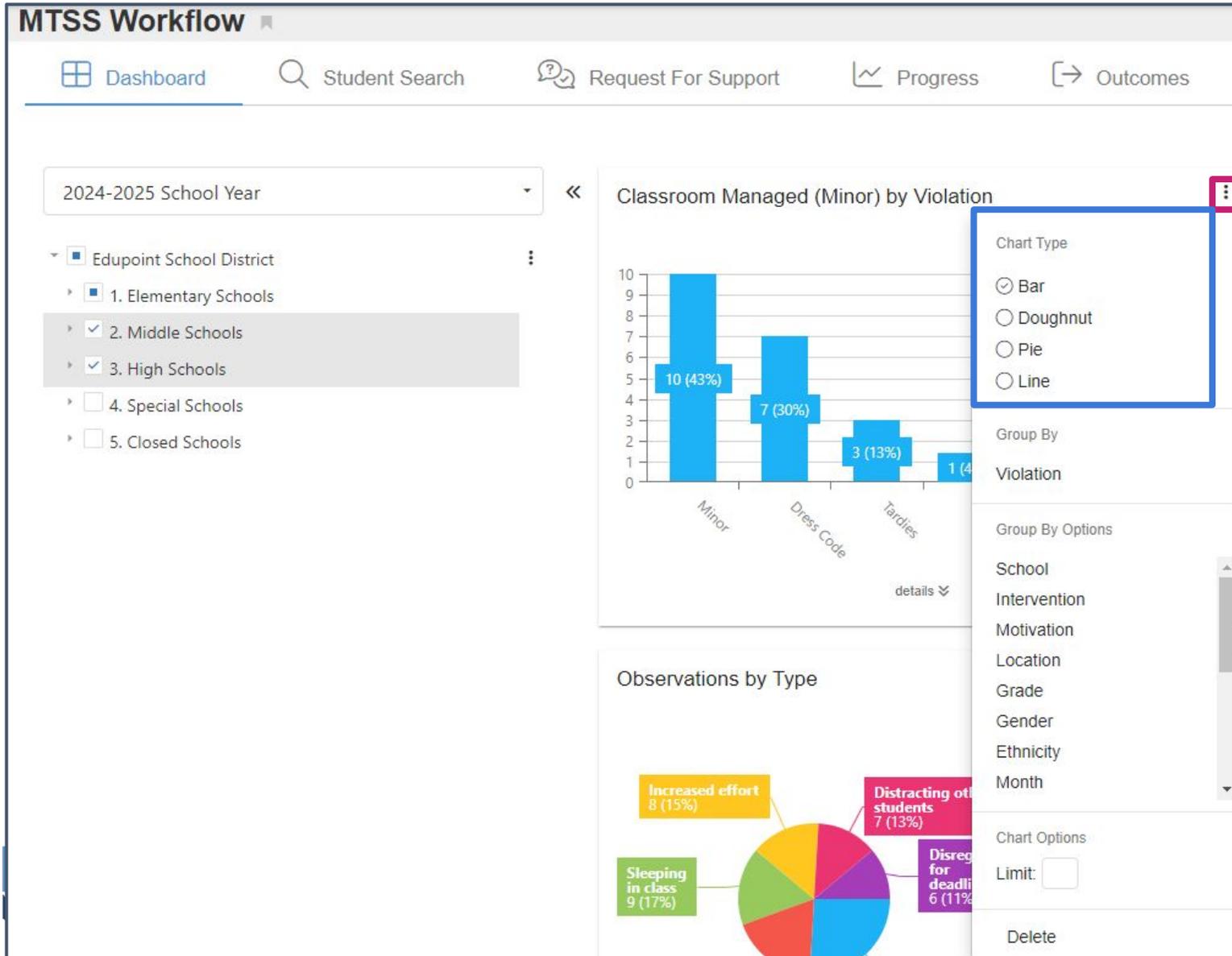
- Observations
- Request For Support
- Classroom Managed (Minor)
  - Classroom Managed (Minor) - Daily Avg per Month
  - Classroom Managed (Minor) - Ethnicity Risk Index
  - Classroom Managed (Minor) - Ethnicity Risk Ratio

## Adding Dashboard Parts

1. Click the + in the right hand corner of the screen.
2. From the Add Dashboard Part section you can select a data graph showing different data sets including:
  - Observations
  - Request for Support
  - Classroom Managed (Minor) Incident

# MTSS Workflow

## Workflow Dashboard

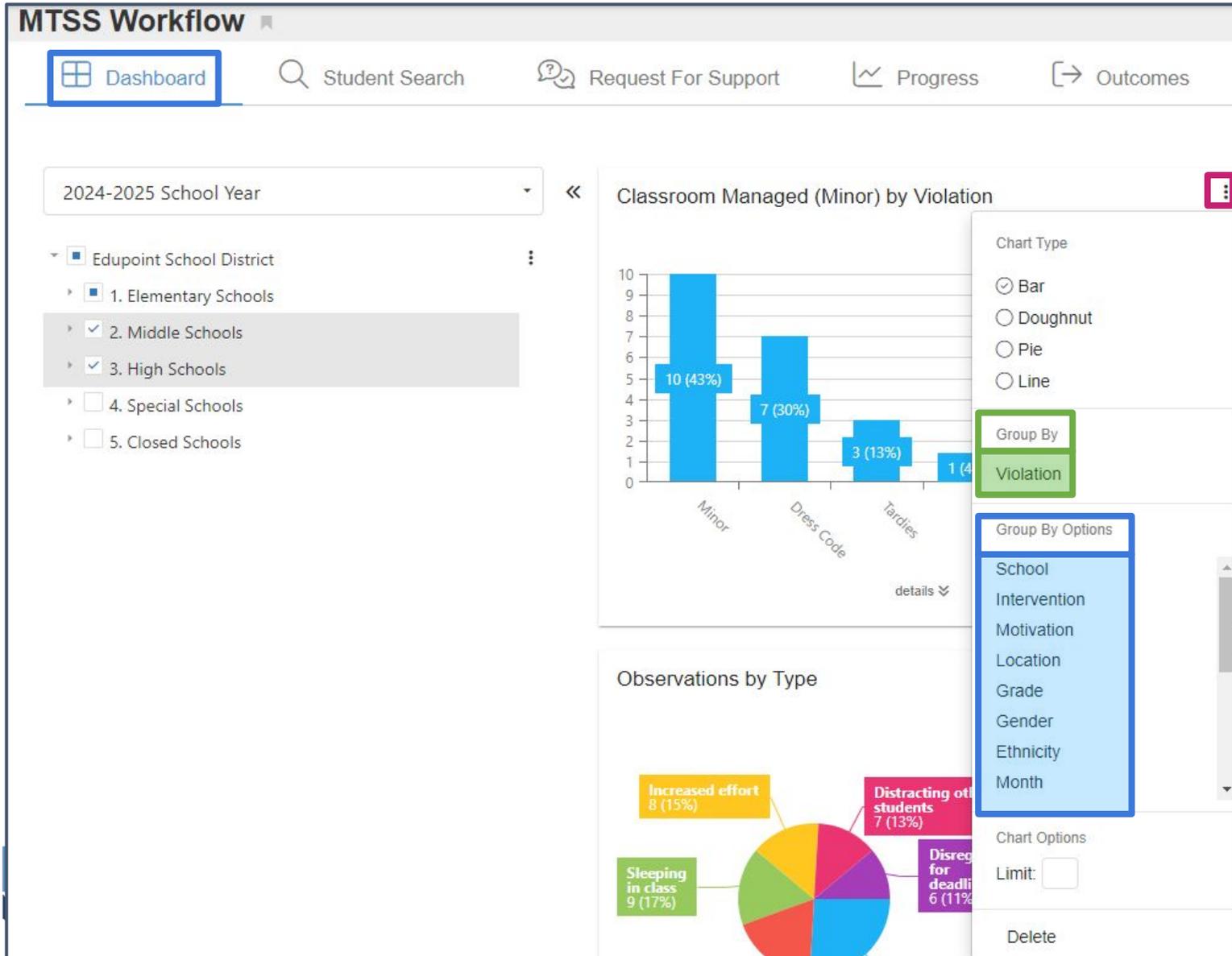


## Change Chart Type

1. Click the  in the right hand corner of the graph.
2. Select the **Chart Type** you prefer to display;
  - Bar
  - Doughnut
  - Pie
  - Line

# MTSS Workflow

## Workflow Dashboard

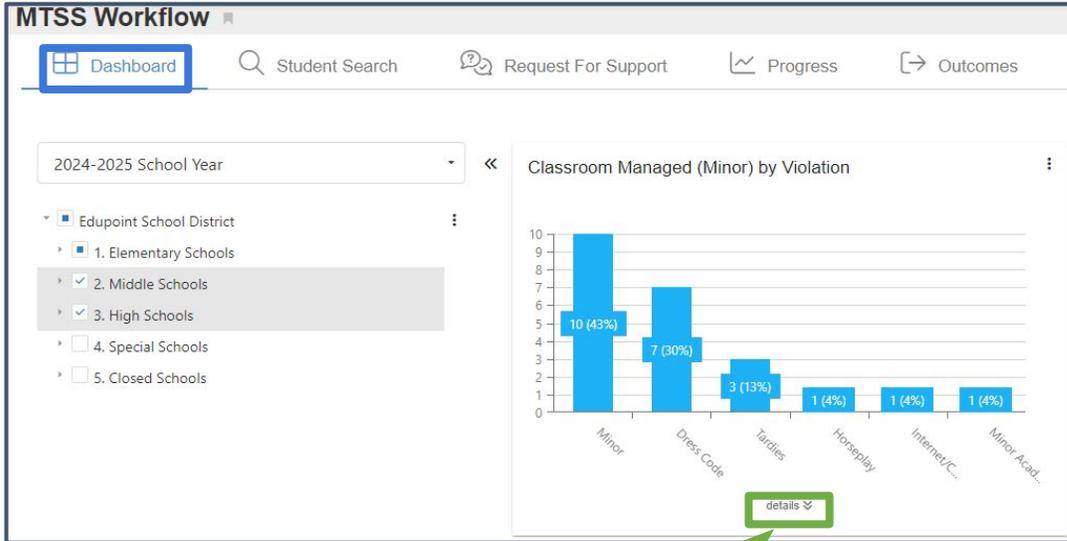


## Add Group By Options

1. Click the  in the right hand corner of the graph.
2. Move **Group By Options** up to the **Group By Section**.
3. This will adjust the graph and make it clickable to display each data set.

# MTSS Workflow

## Workflow Dashboard

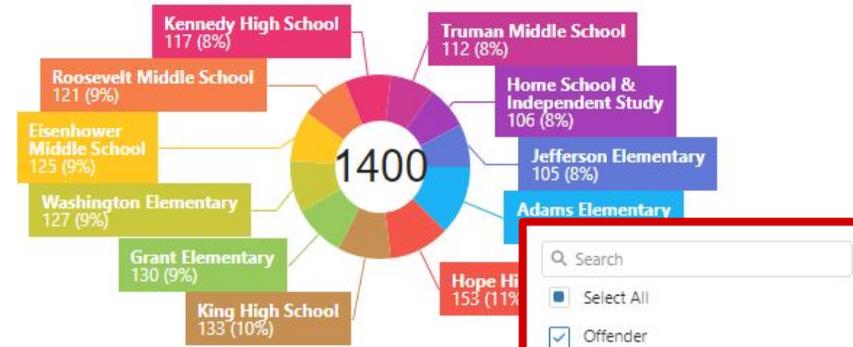


## Details Table

1. Click the on the **Details Arrow** below the graph
2. Drag Column Headings **above the table** to create grouped headings.
3. Keyword search the table with the **Search Bar**.
4. Use the **Funnel Icons** to filter each column to show a more specific data set.
5. Export to a PDF and Print with the mini **Excel Spreadsheet Icon**.

Click Here

Violation » Day » Hour



Drag a column header here to group by that column

Incident ID	Violation	Location	Motivation	Role Description	Role Id	Referring Staff	Instructional
678	No Dance	Sponsored Transportation	N/A	Offender	1	School, Nurse	N/A
555	Tardies	Stadium	N/A	Offender	1	School, Nurse	N/A
262	Academic/Cheating	Sponsored Activity Off Campus	N/A	Offender	1	School, Nurse	Special Ed
1197	Vandalism	Other On Campus	N/A	Offender	1	School, Nurse	N/A

Search

Select All

Offender

Victim

OK Cancel

# MTSS Workflow

## Student Search Tab

MTSS Workflow

Dashboard Student Search Request for Support Progress Outcomes

Select...

- Aaron, Ian (129442)
- Aaron, Susan (411996)
- Aaron, Theresa (126855)

No data

## Selecting a Student

1. Search and then click on your student from the **dropdown menu**.
2. See the **list of all of the MTSS Components** that they are involved in.
3. Click into each component to see their details.

Aaron, Ian (129442)

Type	Date	Description
Aaron, Ian (129442) - Grade 04		
Observation	5/5/2025	Disorganized
Observation	4/10/2025	Off Task
Observation	1/27/2025	Decreased effort
Observation	10/30/2024	Decreased effort
MTSS Plan	9/12/2024	Decoding Skills
CICO	8/6/2024	Balance/Prioritize time, Effort, Organization, Stress management

# MTSS Workflow

## Request for Support Tab

MTSS Workflow

Dashboard Student Search **Request for Support** Progress Outcomes

### Request for Support

Drag a column header here to group by that column

Export Include Archived

Student	Type	Date	Created By	Person Responsible	Status	Archive
Gittens, Ronald	Behavior Referral	05/15/2024	Wilson, Rob		ACCEPTED	<input type="checkbox"/>
Allen, Stephanie	Math Referral	05/15/2024	Carroll, Natalie	Berriz, Cynthia	ACCEPTED	<input type="checkbox"/>
Allen, Stephanie	Math Referral	05/03/2024	Wilson, Rob	Berrie, Jackie	DRAFT	<input type="checkbox"/>
Bahena, Joshua	Math Referral	03/28/2024	Carroll, Natalie	Berrie, Jackie	RETURNED	<input type="checkbox"/>

CICO MTSS

CICO  MTSS

CICO  MTSS

MTSS

Select All  
 ACCEPTED  
 DISMISSED  
 PENDING

OK Cancel

## Request for Support Table

1. To update, click on the **Student Name**.
2. The Request Type can be seen under the **Type column**.
3. Identify who submitted the Request by referring to the **Created By column**.
4. See who was tagged as the person responsible by looking at the **Person Responsible column**.
5. The current status is displayed under the **Status column**.
6. If a student is already enrolled in an MTSS Plan or CICO Enrollment, then the **MTSS/CICO Icons** will be colored blue.
7. You can filter each column by clicking the **Funnel Icon**.

# MTSS Workflow

## Request for Support Tab

### Updating a RFS Status

**Student \***  
Brown, Carl (103045)

**Date \***  
6/27/2023

**Type \***  
Behavior Referral

**Status \***  
Pending

**Person Responsible**  
Select...

**Reviewer Notes**

**Creator Notes**  
  
student profile

Delete?

**Submit**

#### Status Drop Down

**Status \***

Pending

Pending

Accepted

Returned

Dismissed

Finalized

**Accepted:** Request will be accepted and will be attached to the student's MTSS Plan.

**Returned:** Request will be returned to the teacher. Be sure to add notes in the **Reviewer Notes** field to let the teacher know their next steps.

**Dismissed:** The request will not be accepted

**Finalized:** This can be used if a student were to leave the district before any action could be executed for the request.

**Tag a person responsible.**  
(they will receive a task notification)

**Add any comments in the Reviewer Notes field.**

**Click submit.**

# MTSS Workflow

## Request for Support Tab

Request for Support

Drag a column header here to group by that column

Export Include Archived

Student	Type	Date	Created By	Person Responsible	Status	Archive
Gittens, Ronald	Behavior Referral	05/15/2024	Wilson, Rob		ACCEPTED	<input type="checkbox"/> CICO <input type="checkbox"/> MTSS
Allen, Stephanie	Math Referral	05/15/2024	Carroll, Natalie	Berriz, Cynthia	ACCEPTED	<input checked="" type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Allen, Stephanie	Math Referral	05/03/2024	Wilson, Rob	Berrie, Jackie	DRAFT	<input checked="" type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Bahena, Joshua	Math Referral	03/28/2024	Carroll, Natalie	Berrie, Jackie	RETURNED	<input type="checkbox"/> CICO <input type="checkbox"/> MTSS
Aaron, Theresa	Reading Referral	03/20/2024	Wilson, Rob	Bingham, Cara	ACCEPTED	<input type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Vandenham, Hanna	SAT Elementary School Referral	01/01/2024	Carroll, Natalie		ACCEPTED	<input checked="" type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Sabye, Gennifer	SST	10/19/2023	Carroll, Natalie		ACCEPTED	<input checked="" type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Lowe, Ralph	Behavior Referral	08/29/2023	McKenna, Travis		ACCEPTED	<input type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Doodart, Fiffer	Reading Referral	07/03/2023	McKenna, Travis		ACCEPTED	<input checked="" type="checkbox"/> CICO <input checked="" type="checkbox"/> MTSS
Brown, Carl	Behavior Referral	06/27/2023	Wilson, Rob		PENDING	<input type="checkbox"/> CICO <input type="checkbox"/> MTSS

+

## Creating a New Request for Support Table

1. Click on the **Blue Addition Sign** in the bottom right hand corner of the screen.
2. Select the **Type** of Request you would like to submit.
3. Select the **Student**.
4. Identify the **Person Responsible**.
5. Complete the questions in the form.
6. Click the blue **submit button** or **save as a draft** to return to later.

# MTSS Workflow

## Progress Tab

MTSS Workflow

Dashboard Student Search Request for Support **Progress** Outcomes

### Progress

Student Name	Type	Date	Person Responsible	Progress
Willie Alejandroz	CICO	8/8/2023 - 6/14/2024	McKenna, Travis	⚠ Not Meeting Goal
Virginia Rojas	MTSS Plan 🧑	7/3/2023 - 8/28/2023	Travis McKenna	⚠ Not Meeting Goal
Travy McKenna	MTSS Plan 🧑	6/26/2023 - 11/20/2023	Travis McKenna	⚠ Not Meeting Goal
Theresa Aaron	MTSS Plan	4/5/2024 - 5/31/2024	Admin User	✅ Meeting Goal

## Progress Table

Shows all **open** MTSS Plans and CICO Enrollments

There are 5 columns in the Progress Table

- Student Name
- Type
- Dates of the Plan
- Person Responsible
- Goal Progress

# MTSS Workflow

## Outcomes Tab

Student Name	Type	Date	Person Responsible	Outcome
Aaron Bustamante	CICO	6/27/2023 - 10/30/2023	McKenna, Travis	⚠️ Did Not Meet Goal
Alan Johnson	CICO	6/26/2023 - 11/24/2023	Carroll, Natalie	⚠️ Did Not Meet Goal
Braxton Davis	MTSS Plan 🧑	7/3/2023 - 8/28/2023	Travis McKenna	✅ Met Goal
Bruce Laird	MTSS Plan 🧑	7/24/2023 - 10/23/2023	Travis McKenna	✅ Met Goal

## Outcomes Table

Shows all **closed** MTSS Plans and CICO Enrollments

There are 5 columns in the Outcomes Table

- Student Name
- Type
- Dates of the Plan
- Person Responsible
- Goal Progress

# Questions?