



Communities
In Schools

Data Management System

Site Coordinator User Guide

Updated October 2019

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ABOUT THIS GUIDE

The CIS Data Management System (“CISDM”) is an online database used by Communities In Schools site coordinators to document all components of the CIS model. It is a tool central to the work of Communities In Schools, used because of its unique ability to monitor progress and measure success specific to the CIS model.

The User Guide is designed as a companion to CISDM usage throughout the year. The Site Coordinator User Guide includes step-by-step instructions as well as screenshots for key elements of delivering the CIS model, from the school needs assessment to building a caseload. This guide also walks a user through basics including access and system navigation. The User Guide may supplement the training and onboarding of new CIS Staff and be used for ongoing reference.

Throughout the year, the Communities In Schools National Office also offers trainings, how-to videos, and webinar recordings on [CIS University](#), as well as upcoming webinars, additional resources, job aids, system reports, and tools and templates on the [National Resource Center](#).

Thank You!

This manual has benefitted from expertise and input from across the CIS network. CIS National wishes to thank the professional contributions of Data Ambassadors from:

CIS of North Carolina

CIS of Pennsylvania

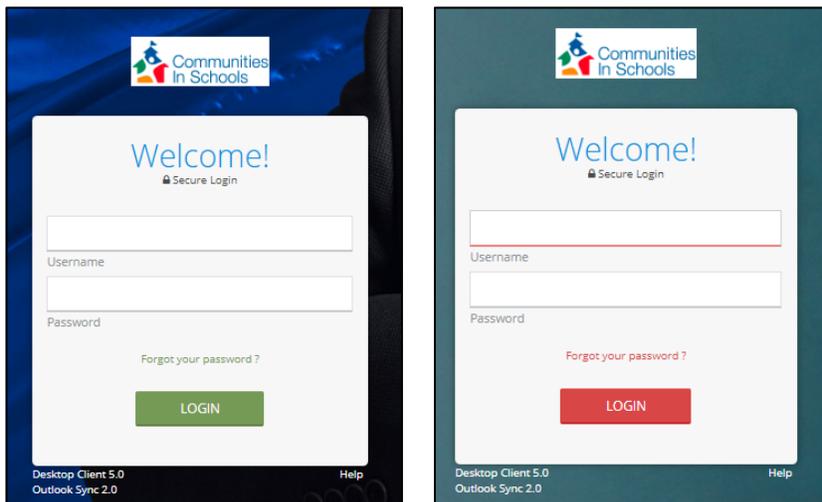
CIS of Puyallup

CIS of Richmond

1 Accessing CISDM

To access CISDM, enter the following URL into your web browser: https://app.caseworthy.com/cis_prod.caseworthy. You will see the **GREEN** login screen below.

Enter your unique Username and Password into the entry fields shown below and click on the 'LOGIN' button:



You can access the CISDM Training Site (referred to as UAT) at this URL:

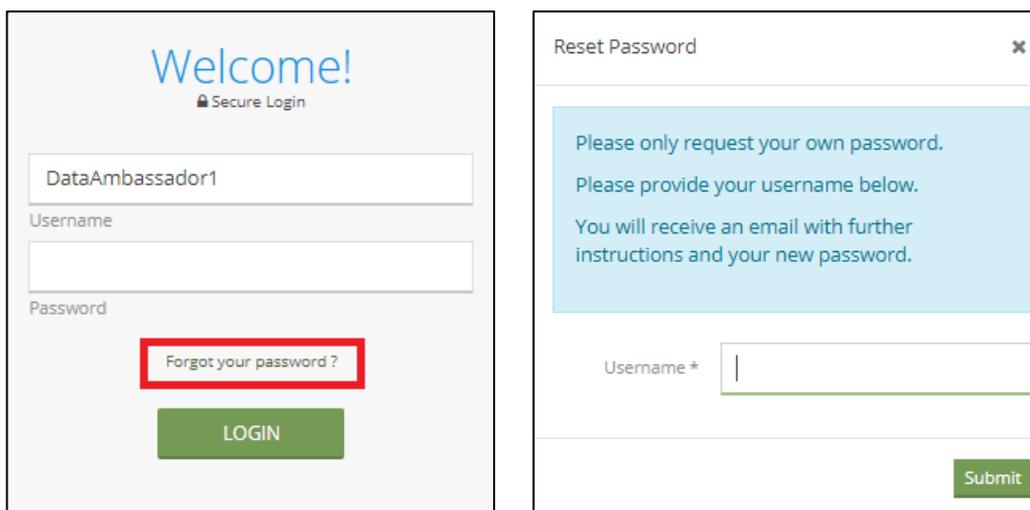
https://app.caseworthy.com/cis_uat.caseworthy.

You will use the same Username and Password as you do in the production site (PROD). UAT mirrors PROD, but will show up in **RED** so you know you are in the training site. The UAT site will be updated monthly with a new copy of PROD.

Note: Passwords must be changed every 90 calendar days.

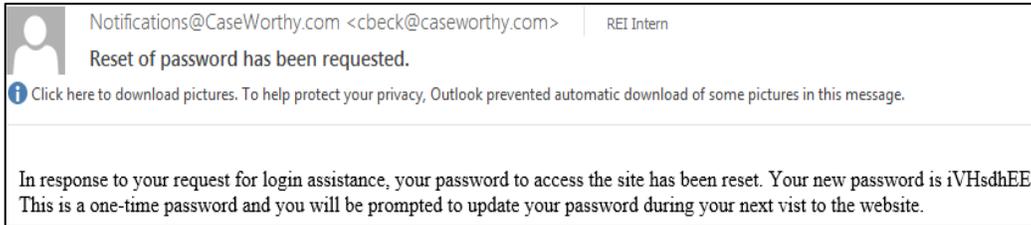
1.1 Requesting a New Password

To reset or change your password, click the 'Forgot your password?' link shown below. The 2nd screen below will appear, prompting you to enter your username.



After your e-mail is entered and submitted, a notification will appear on the screen to verify the password reset request has been received and that you will receive a temporary password.

Shortly after requesting a password reset, an e-mail like the one below will be sent, prompting you to use a temporary password to log into your account. To avoid errors in entering your temporary password, simply copy the password from your e-mail (be careful not to capture any additional spaces or characters) and paste it into the login screen.



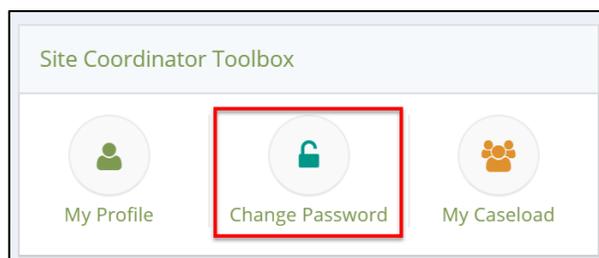
1.2 Resetting Your Password Externally

Upon entering a temporary password, the following screen will appear, prompting you to enter a new permanent password. The password must be between 6 and 20 characters long and include one capital letter, one number, and one of the following special characters: ! @ # \$ % ^ & * { (} \ [/] .

After creating your new permanent password, you will be redirected to the main login screen to enter your username and new password to gain access to CISDM.

1.3 Resetting Your Password Internally

To change your password within CISDM, access the Change Password form. This can be accessed from the Site Coordinator Dashboard within the Site Coordinator Toolbox and clicking on the Change Password icon, indicated with a red box below. The system will navigate to the Change Password form.

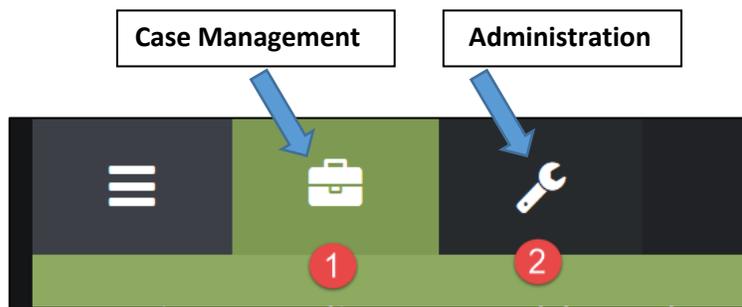


Note: The password must be between 6 and 20 characters long and include one capital letter, one number, and one of the following special characters: ! @ # \$ % ^ & * { (} \ [/] .

2 Navigating the Data System

2.1 System Work Areas

There are two main work areas for the Site Coordinator role as shown below: Case Management (1) and Administration (2). Each work area offers different dashboards and links.



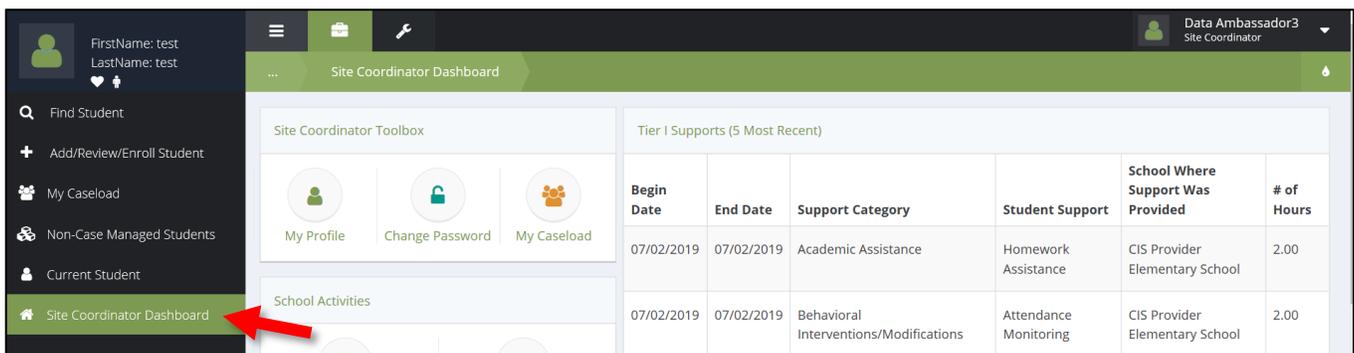
2.1.1 Case Management

The Case Management area provides a workspace to enter and view school and/or student information. To access the Case Management area at any time, click on the toolbox icon.

If you are new to CISDM and accessing the Case Management area for the first time, a student must be selected from the [5.1 Find Student](#) menu or created using the [6.1 Add/Review/Enroll Student](#) workflow for you to access the full list of items in the left-hand menu. A student must be loaded into the dashboard to access the Site Coordinator and Student dashboards.

2.1.1.1 Site Coordinator Dashboard

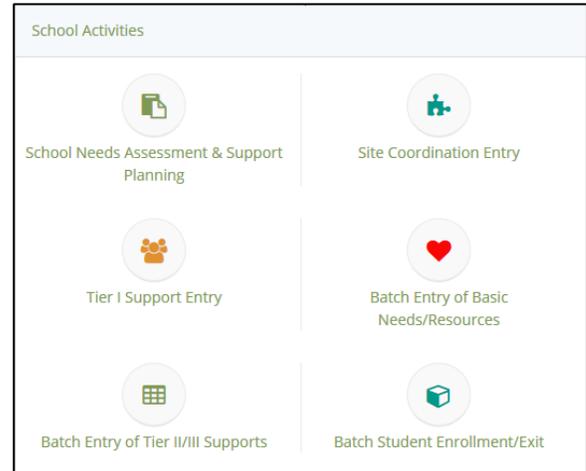
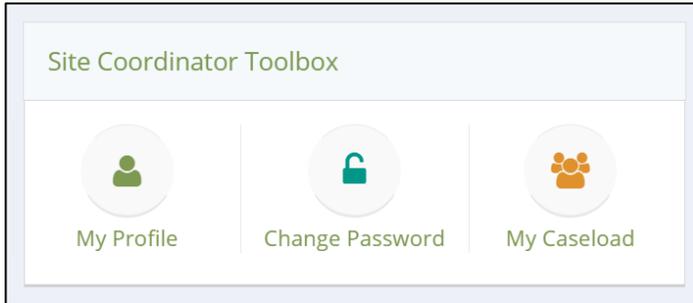
The Site Coordinator Dashboard is accessed from a quick link on the left-hand menu. Use this link to navigate back to the Site Coordinator Dashboard at any time. This dashboard includes the Site Coordinator Toolbox, School Activities, and visual elements and tables displaying information such as the most recent supports at the school.



2.1.1.2 Site Coordinator Toolbox and School Activities

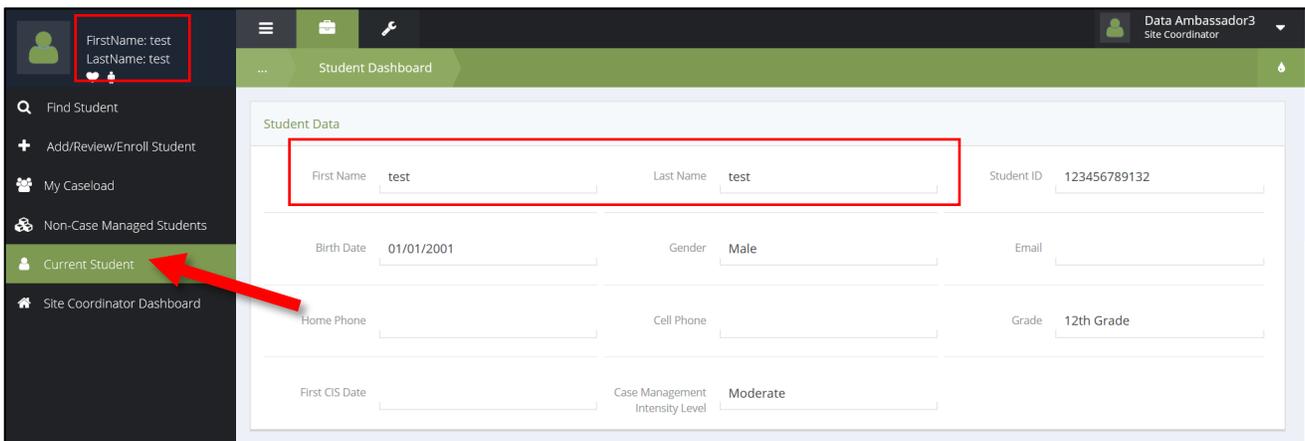
The Site Coordinator Toolbox, pictured below, consists of tools Site Coordinators can use to build their user profile, change their password, and access their student caseload. See [3 Updating Your Profile from the Site Coordinator Dashboard](#).

The School Activities section consists of tools that will aid in school level Site Coordinator responsibilities. See [4 Entering School Activities from the Site Coordinator Dashboard](#).



2.1.1.3 Current Student (Student Dashboard)

Users can access the Student Dashboard for the current student whose name is shown in the upper left-hand corner by clicking on Current Student from the left-hand menu.



On the **Student Dashboard**, you have access to basic student information, including name, birth date, and sex/gender as well as a student's most recent supports, check-ins, and basic needs/resources.

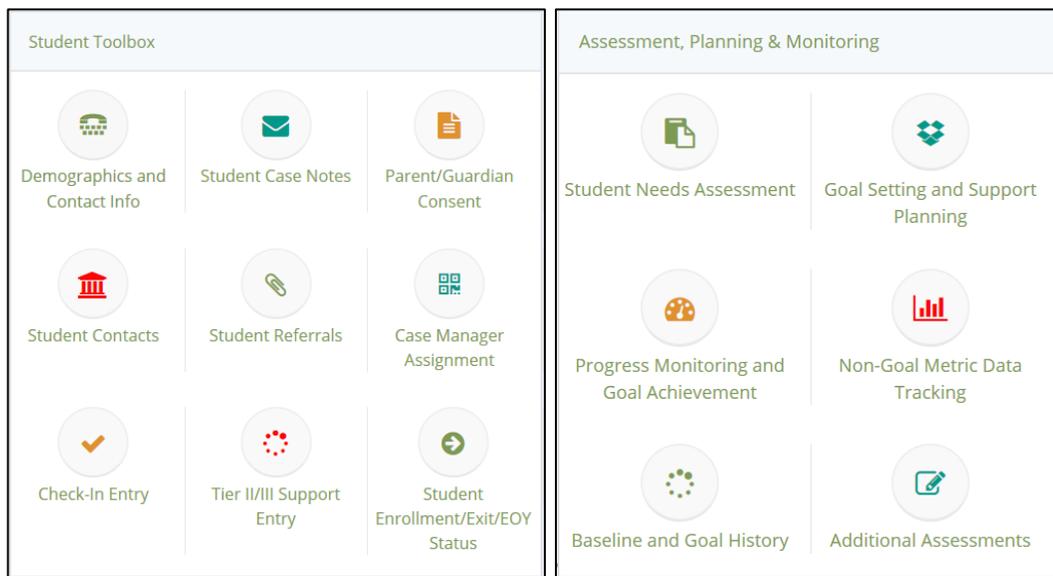
The Student Dashboard features an Enrollment History area that provides a quick look at previous and current enrollments based on the student record being viewed. This query appears if a student has a current or previous enrollment with CIS recorded in the system. The query is set to show up to 5 of the most recent enrollments.

Enrollment History (3)								
Begin Date	End Date	School	Grade	School Year	Status	Last Support Date	Total Supports Hours	Total Supports Count
08/02/2018	12/31/9999	Fake School	12th Grade	2018/2019 SY	Enrolled	02/27/2019	3.00	1
10/20/2017	07/10/2018	CaseWorthy	Pre-K	2017/2018 SY	Exited			
09/21/2016	12/01/2017	CIS Provider Elementary School	1st Grade	2016/2017 SY	Exited	12/01/2016	13.25	7

This dashboard enables the site coordinator to edit student information, complete a Student Needs Assessment and a Student Support Plan, and enter information for provided supports and student interaction.

2.1.1.4 Student Toolbox

The **Student Toolbox** is located on the Student Dashboard and provides many forms for student record editing and review. The first icon within the toolbox is where you can edit Demographic and Contact Information such as the student name, race/ethnicity, sex/gender, birth date, address and so on. Clicking on an icon will take you to that section.



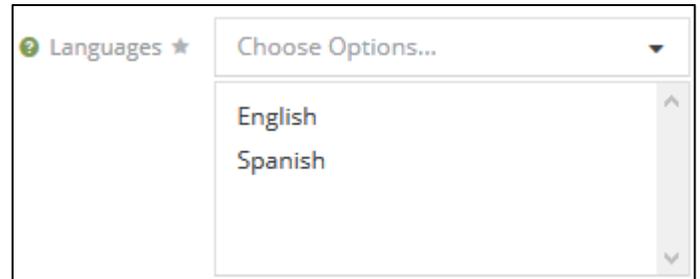
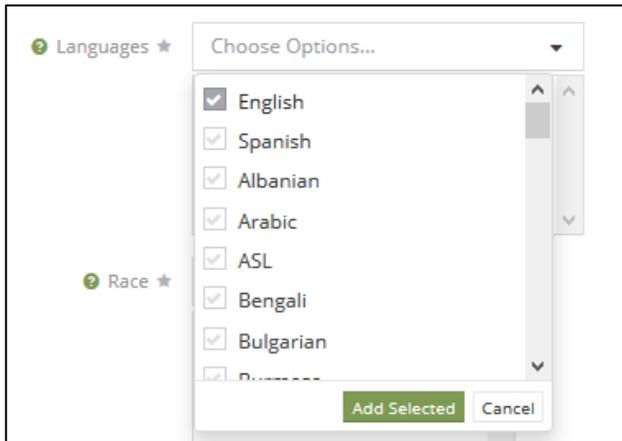
2.1.2 Administration (Reports and Summaries)

The Administration area is where reports and summaries are located and provides users with the ability to run reports or specific summaries based on their current school assignment. To access the Administration area at any time, click on the wrench icon. To learn more, see [11 Running Reports and Summaries](#).

2.2 Unique System Features

2.2.1 Multi-Select tables

CISDM features multi-select dropdown lists throughout many of the forms and workflows.

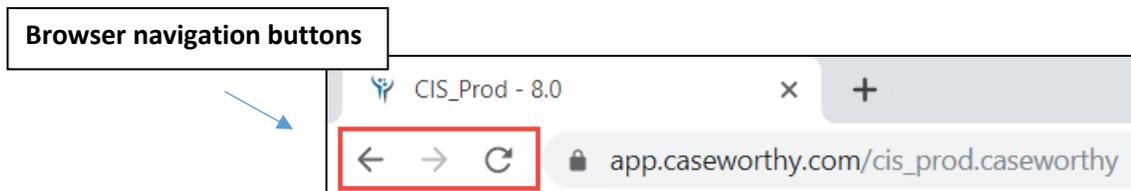


Check the box next to each item to select one, multiple, or all response options. To save the selection, click the 'Add Selected' button. Those selections will then appear in the selection area, as shown above.

If an item is reselected once it is in the selection area, it will remove that item from the selection box.

2.2.2 Avoiding Web Browser Navigation Buttons

CISDM is a web application that is connected to a live database. When working in CISDM, **DO NOT USE the browser navigation back/forward/refresh buttons.**

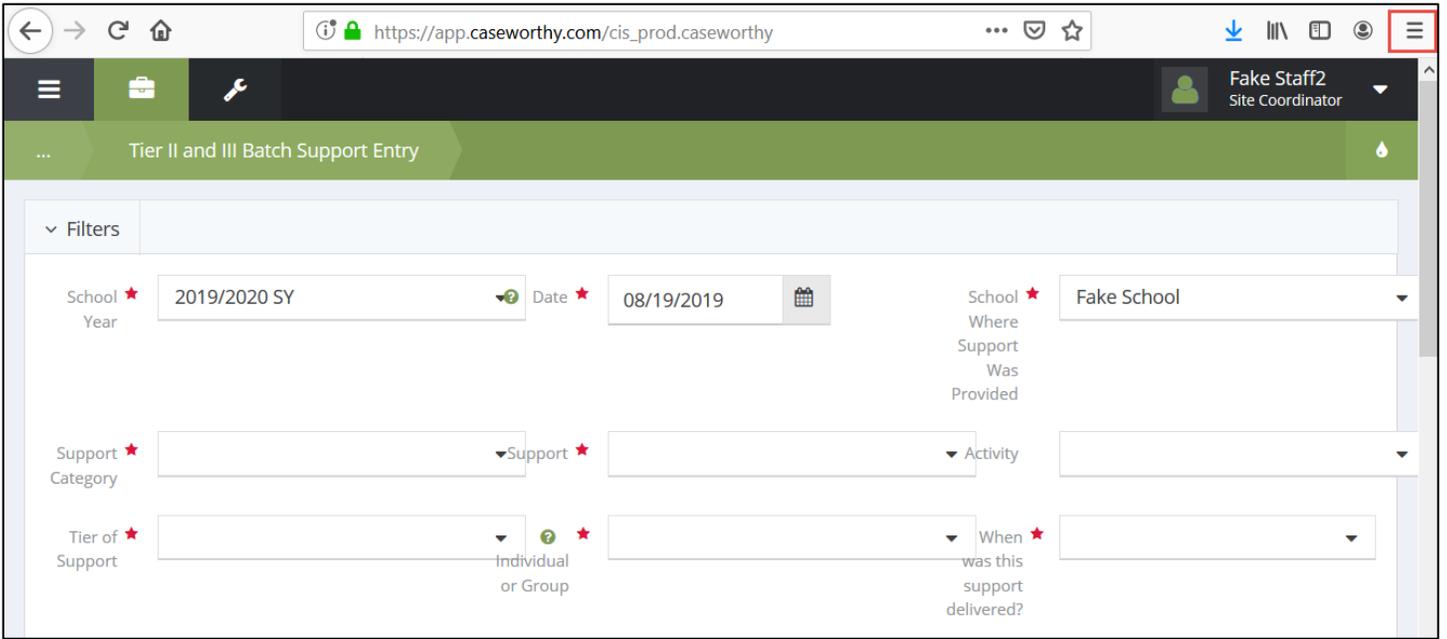


The browser navigation buttons do not interact with the database and will instead cause your session to become interrupted. This will require users to log back into CISDM and **could potentially cause a loss of information** that was not saved prior to the interruption. To go back to a page you were on before, see section [2.2.5 Returning to a Previous Screen in the System \(Breadcrumbs Navigation\)](#).

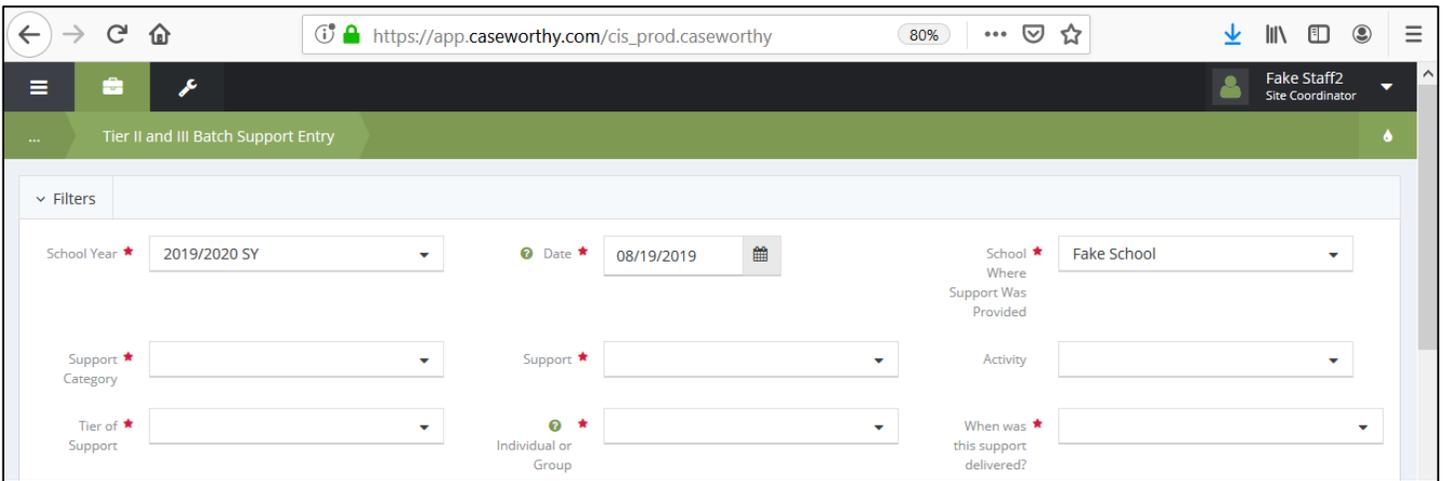
2.2.3 Adjusting screen and text size

CISDM is made to work with all major web browsers but is best viewed in **Mozilla Firefox**. Users may, at times, need to adjust the zoom of the browser to have a better experience using the system.

The browser zoom control greatly affects how input areas are displayed on the screen. The example below details how the system appears when the zoom is too high causing input areas begin to merge and making data entry difficult. The screen shot below was taken at 100% zoom in the Mozilla Firefox browser. The drop-down lists and labels are merging into each other on the screen and even pushed off the screen.



The screen shot below was taken at 80% zoom using the Mozilla Firefox browser and displays the input fields correctly with proper spacing.

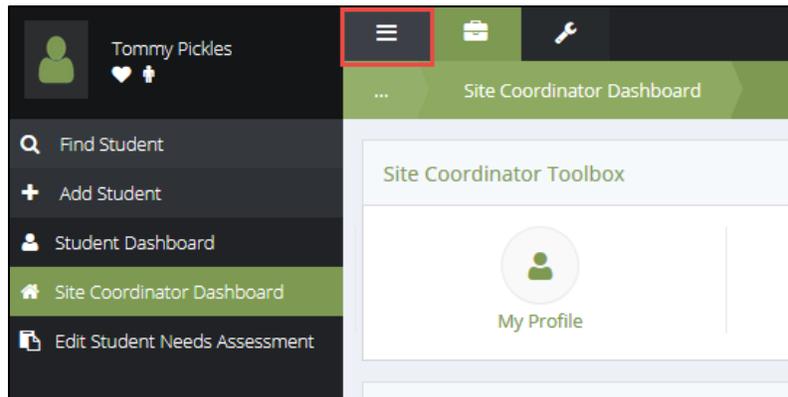


Note: Not all browsers will display information in the same manner so it's important to adjust the zoom for your preference or need.

2.2.4 Maximizing Views in the System

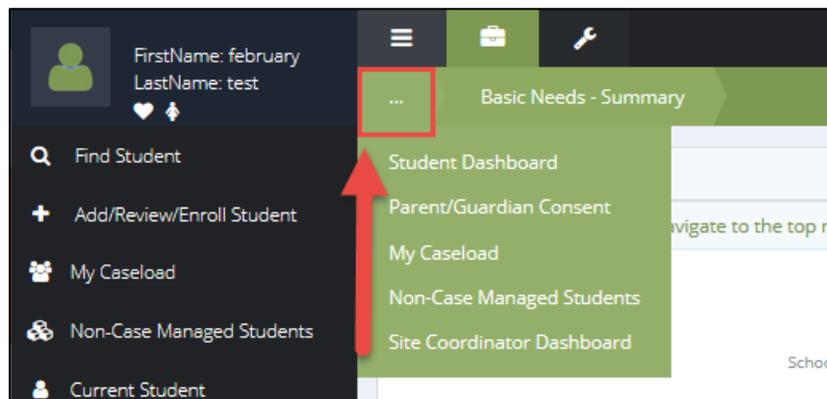
CISDM works well in any browser, however, with the translation in web language from one browser to another, it can be a task for each page and form to look the same using multiple browsers. We encourage all users to maximize their browser window when actively entering data in CISDM, as that will allow all buttons and icons to display properly on the monitor.

To maximize the view in CISDM, especially if using a mobile device or tablet, collapse the left-hand menu by selecting the 'maximize/minimize' feature. This feature is available to all users and can be found next to the Case Management icon as 3 parallel lines. Re-select the icon to reveal the left-hand menu.



2.2.5 Returning to a Previous Screen in the System (Breadcrumbs Navigation)

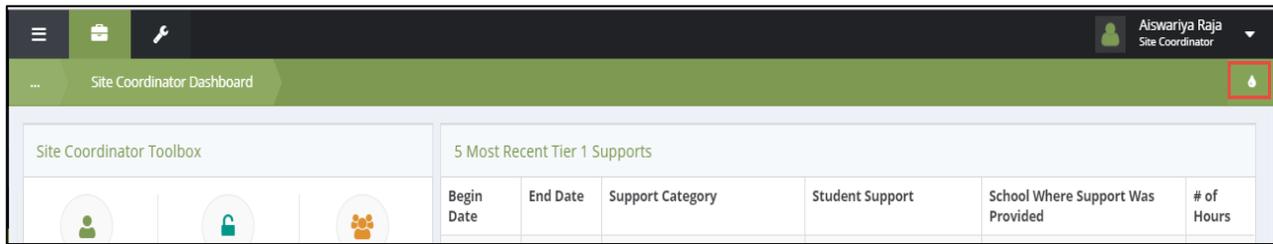
If you would like to return to a previous window in CISDM, use the breadcrumb navigation feature. This area can be found in the Case Management and Administration areas of the system. Breadcrumbs allow you to return to a previous window within one of the two areas. The screenshot below shows the forms previously accessed within the Case Management area, with the most recent window being the "Site Coordinator Dashboard".



Note: When changing between system work areas, the breadcrumbs history will refresh. For example, when navigating to the Case Management area from the Administration area, any previous windows accessed within the Administration area will have been cleared from the Breadcrumbs icon.

2.2.6 Printing, Exporting, Saving Progress, and Recycling (Teardrop Menu)

The teardrop menu is located on the right-hand corner of most forms and workflows (as indicated by a red box in the picture below). Depending on if you are in a dashboard, workflow, entry, or summary form; there may be different menu items available.



This menu provides many features including:

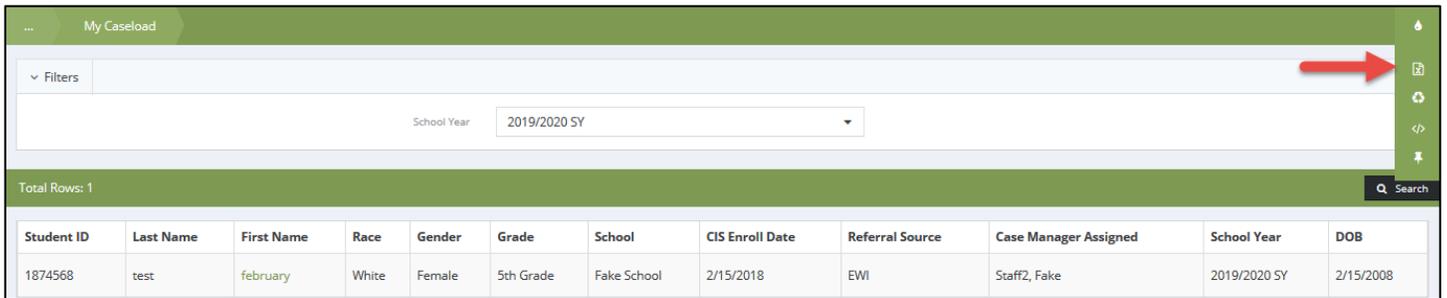
Menu Items	Menu Name	Description
	Print	Print the current form or dashboard.
	Excel Export	Export the current summary information to a downloadable Excel file.
	Pin Page	Pin a frequently visited page to be saved as a 'favorite'.
	Recycle	Restore deleted entries on a summary form.
	Embeddable URL	Allows for CISDM administrators to post URL's, this feature is not active for the Site Coordinator role.
	Save Progress and Close	Save progress within a workflow. To save the workflow, at least its first form must be saved. Save progress and close only functions from the 2 nd form within a workflow and onward.
	Exit Workflow	This option should not be used unless you need to Cancel a workflow (not saving any of the data).

2.2.7 Opening an Excel Export

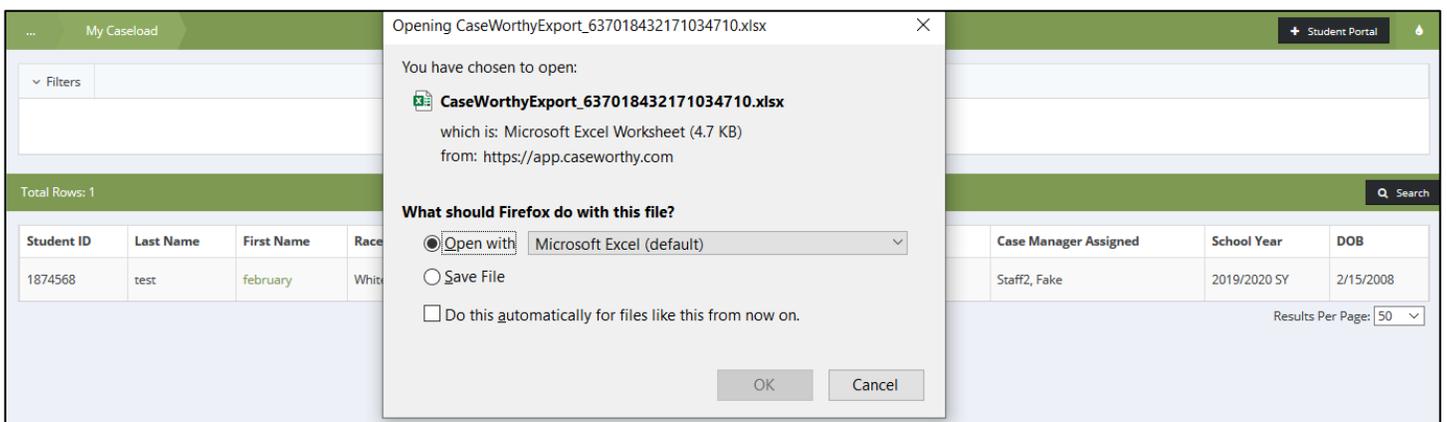
Occasionally it may be necessary to export information out of CISDM for reporting or verification purposes. In this example, we will cover exporting an individual Site Coordinator caseload to an Excel file. This export feature is available throughout the system.

The Site Coordinator will access the list of students on their caseload by clicking on the My Caseload link in the left-hand menu of the Case Management area.

Note: Must click search prior to exporting if no data populates on screen or form will throw an error.



From the My Caseload form, access the teardrop menu on the right-hand side of the screen. The menu will provide a dropdown with options. Choose the Excel Export option. Depending on the browser, a pop-up screen may appear that will allow you to Open the file or Save the file based on your preference.



Note: The example above was performed using Mozilla Firefox browser. Different browsers may or may not require a response to Open or Save the file.

2.2.8 Sorting Data and Opening Queries

Data is displayed in table format on both the summary forms and dashboards. To sort the data located on a summary form, click any of the column headers to update how the data is displayed. See below where clicking on any of the column headers will sort the data table alphabetically or numerically. Date columns can be sorted as well.

Student ID	Last Name	First Name	Race	Gender	Grade	School	CIS Enroll Date
78910	Test	Talenti	White	Male	11th Grade	Fake School	7/1/2019
123456123	Test	Dobby	Asian	Male	9th Grade	Fake School	7/3/2019
92399	Yelnats	Stanley	Asian/Pacific Islander	Male	7th Grade	Fake School	7/2/2019

Data tables on dashboards cannot be sorted as they provide summarized data generated by a query. Query tables can be identified by a 'Title' row at the top of the query and are always found on a dashboard. The query below is found on the Site Coordinator Dashboard. To view the raw dataset, click on any row within the data table.

Tier I Supports (5 Most Recent)					
Begin Date	End Date	Support Category	Student Support	School Where Support Was Provided	# of Hours
07/10/2019	07/12/2019	Academic Assistance	Homework Assistance	Fake School	3.00
07/10/2019	07/12/2019	Academic Assistance	Homework Assistance	Fake School	1.00
07/10/2019	07/12/2019	Professional Mental Health	Child Abuse/Neglect Intervention	Fake School	2.00
07/01/2019	07/14/2019	Academic Assistance	Literacy	Fake School	2.00
07/01/2019	07/31/2019	Academic Assistance	Credit Recovery/Retrieval	Fake School	2.00

2.3 Understanding Workflows

A workflow is a series of forms that you can fill out in one sitting, or from beginning to end over a longer period of time. Workflows can be saved and then returned to for completion at any time. There are 6 major workflows in CISDM:

- School Needs Assessment
- School Support Plan
- Add/Review/Enroll Student
- Student Needs Assessment
- [Student] Goal Setting & Support Planning
- School EOY Data

These workflows standardize the way data is captured in the system and allow users to experience a repeatable process each time any one of these workflows are started.

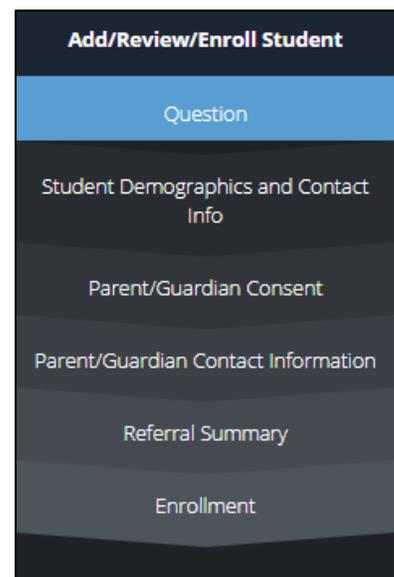
All workflows in CISDM have a similar look and feel, in the example below, we will look at several parts of the workflow and understand the basic concept of working through a workflow.

2.3.1 Viewing forms in a workflow

Workflows combine multiple forms into a single flow to be completed sequentially. Below, the Add/Review/Enroll Student workflow displays the forms necessary to enter a new student record into the system.

These forms need to be completed to finish the process of adding a new student record and complete the workflow. The left-hand menu of every workflow displays the forms to be completed from first to last. The forms **cannot be completed in any other order** than how they are presented on the menu.

Note: Workflows are meant to guide the user forward through the forms being presented. It is **not possible** to go “back” while in a workflow, so it is critical to understand what forms are going to be presented and that **the forms can be edited later once the workflow is complete.**



2.3.2 Saving Workflows

Workflows in CISDM can be stopped and saved to work on at a later point in time. Users starting a workflow must save at least the initial form in the workflow to be able to save the progress and data entered.

Save Progress and Close

The screenshot shows the 'Student Needs Assessment' interface. On the left is a navigation menu with items like 'Student Demographics', 'Student Enrollment', 'Contact Information', 'Identify Risk Factors', and 'Risk Factors Summary'. The main area is titled 'Student Enrollment' and contains form fields for 'Enrollment Entry Date', 'School Year', 'Grade', 'Home School' (set to 'Fake School'), and 'Homeroom Teacher'. A teardrop menu is visible on the right side of the form, with a red box highlighting the 'Save Progress and Close' option. A blue arrow points from the text 'Save Progress and Close' above to this menu item.

There are several options available during the workflow that can be found in the teardrop menu. Not all menu items are always available and depends on the form being accessed, refer to section [2.2.6 Printing, Exporting, Saving Progress, and Recycling \(Teardrop Menu\)](#).

2.3.3 Resuming a Workflow

Workflows that have been saved can be resumed later. Depending on which workflow was started, click on the appropriate icon for that workflow (e.g. if Student Needs Assessment was saved, click on the Student Needs Assessment icon to reopen the workflow).

Note: For this feature to work properly, you must save the information on at least the first form within the workflow.

The example below is taken from the Goal Setting & Support Planning workflow and assumes a user has saved a few forms into the workflow.

Note: For information about the Student Support Plan, reference [8.3 Goal Setting and Support Planning](#)



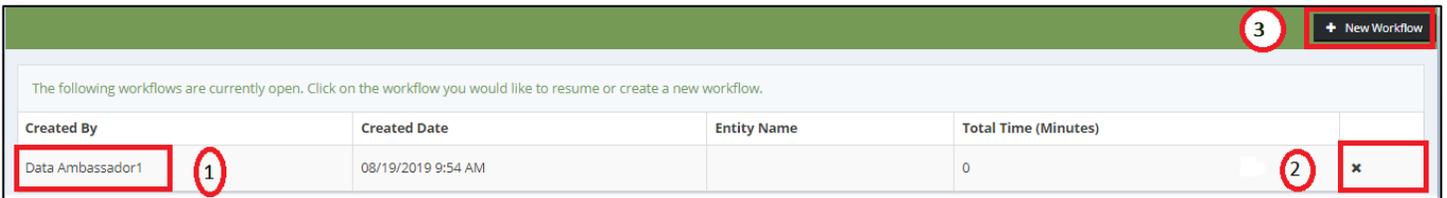
For this example, click on:

1. From the Student Dashboard, click on the Goal Setting and Support Planning icon.
2. Then, in the correct year’s support plan, click the Goal Setting and Support Planning icon to resume the workflow for this student.

Affiliate	School Year	Goal Setting And Support Planning	Meeting Frequency and Planned Supports	Print Student Support Plan	School	Plan ID	Enrollment ID	Created Date
Communities In Schools National Office	2017/2018 SY				CIS Provider Elementary School	67962	181332	2/15/2018
Communities In Schools National Office	2018/2019 SY				CIS Provider Elementary School	83930	197379	8/22/2018
Communities In Schools National Office	2019/2020 SY				Fake School	152301	265977	7/3/2019

The system will display a summary of open workflows. Users can then either 1) resume an open workflow by clicking in the summary table for the appropriate student, 2) delete an open workflow by clicking on the ‘x’ icon on the right-hand side of the summary table, or 3) open a new workflow by clicking on the New Workflow button.

Resuming an open workflow for the student will start the workflow where the last save occurred.



2.3.4 Exiting a Workflow

If a workflow is started but needs to be canceled entirely, **meaning that any information entered will not be saved**, click on the tear drop menu  use the Exit Workflow icon  to properly close out the workflow.

Note: Using the 'X' from the browser window itself forces the workflow process to end and may result in a frozen dashboard return or an improperly saved workflow. For more information on properly saving and closing a workflow refer to [2.3.2 Saving Workflows](#).

3 Updating Your Profile from the Site Coordinator Dashboard

3.1 My Profile

The My Profile icon in the Site Coordinator Toolbox leads to a form requesting information about the Site Coordinator. Some of the user information is automatically populated based on the initial user creation by the affiliate or local administrator. This form requests information such as name, address, job title, and start date, and information regarding educational credentials and related skills. Required fields are indicated with a star and should be completed upon accessing your account. For example, the fields for First Name and Last Name in this form are **required** and display a small star icon.

Note: Required fields on the My Profile form are aggregated during the End of Year reporting process. Any information missing from the My Profile form will be requested prior to the end of the school year.

3.2 Change Password

This icon navigates to a form that allows users to change their own password at any time, see [1.3 Resetting Your Password Internally](#).

4 Entering School Activities from the Site Coordinator Dashboard

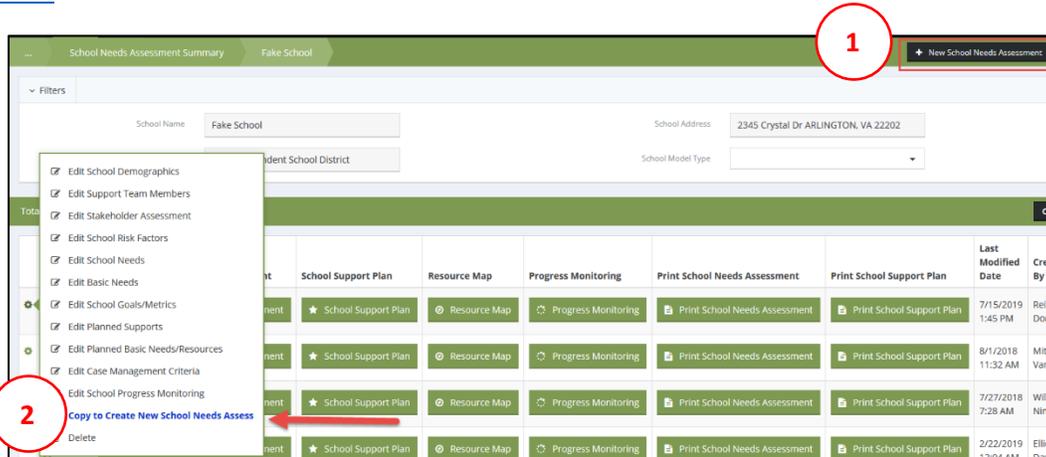
4.1 School Needs Assessment & Support Planning

The School Needs Assessment is created in a workflow in CISDM. The needs assessment captures data about the school itself. It helps users to analyze multiple sources of data to narrow down the key needs of the school they are serving and identify the community partners that will aid in providing supports during the school year.

1. Upon clicking on the School Needs Assessment & Support Planning icon in the Site Coordinator Dashboard, shown below, a summary area will appear. Users will identify and select the school for which they will create a Needs Assessment or School Support Plan.
2. On the identified school, click on the action gear in the appropriate row and choose School Needs Assessment Data from the menu.



3. If the School Needs Assessment has not been started/saved, the summary area will appear empty. Once at least one needs assessment has been started or completed, the summary table will be filled out with more options. Each year, the school should have one of each of the following completed:
 - a. School Needs Assessment
 - b. School Support Plan
 - c. Progress Monitoring
4. There are two options to create a new needs assessment for the current school year. 1) Click on New School Needs Assessment to start a brand-new needs assessment from scratch, or 2) click on the action gear and select “Copy to Create New School Needs Assess”. The copy feature will copy over select fields from the previous year’s school needs assessment. For more information, see [4.1.1 Copying to Create a New School Needs Assessment](#).



- After this workflow is complete, click on the School Support Plan icon. This will initiate the workflow to create a new School Support Plan. Many of the forms from the School Needs Assessment will feed into this workflow either as an editable form (Student Demographics) or as a view only form (e.g. School Needs, Risk Factors). This information will help users analyze and prepare a plan without needing to duplicate information.

School Year	Review/Edit School Needs Assessment	School Support Plan	Resource Map	Progress Monitoring	Print School Needs Assessment	Print School Support Plan
2018/2019 SY	★ Review/Edit School Needs Assessment	★ School Support Plan	🕒 Resource Map	⚙️ Progress Monitoring	🖨️ Print School Needs Assessment	🖨️ Print School Support Plan

- To print either the School Needs Assessment or the School Support Plan, click on the corresponding Print icon listed in the above image. This will launch a print form, which displays a few of the data fields that will appear on the PDF export. To view the full document, click on the PDF Export icon on the top right-hand corner.

Note: If you are not getting the PDF export, be sure to allow pop-ups from CaseWorthy in your browser settings.

- To edit forms found in the School Needs Assessment or the School Support Plan, click on the action gear to open a menu that features each individual form found in the workflows.

4.1.1 Copying to Create a New School Needs Assessment

From the action gear of the needs assessment you want to duplicate, click “Copy to Create New School Needs Assessment”:

 [Copy to Create New School Needs Assess](#)

A new School Needs Assessment should appear. Click “Review/Edit School Needs Assessment”. The following data fields will copy over to the new assessment:

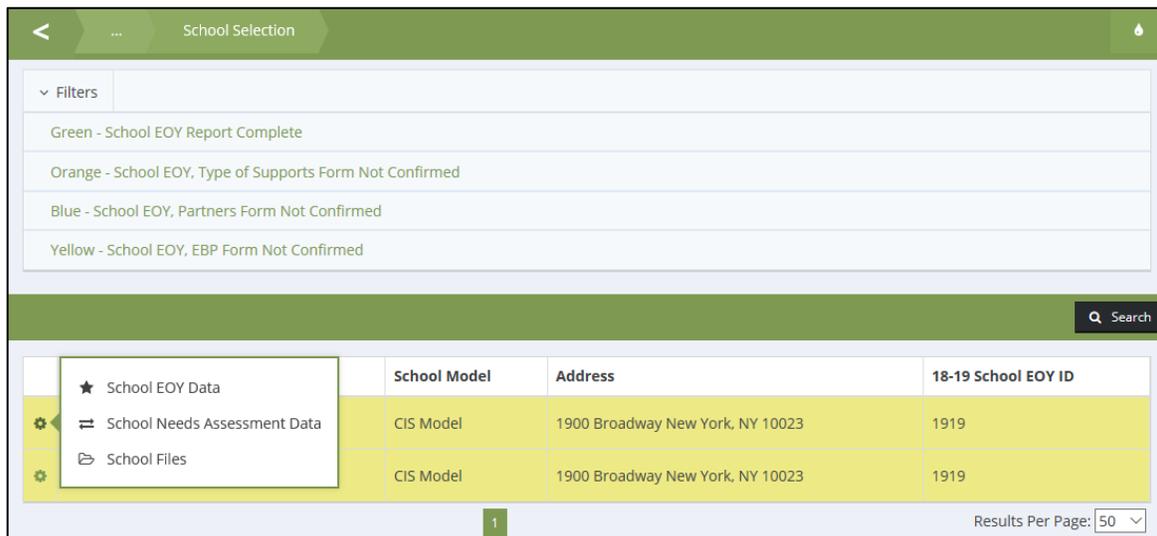
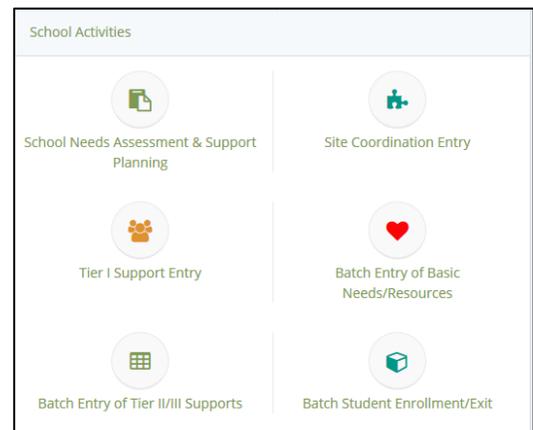
- School Profile
- School Basic Needs
- School and Community Demographics and Metrics
- School Risk Factors
- School Needs

Note: Be sure to edit the correct copy so that you are not accidentally editing last year’s needs assessment! There must be a new needs assessment for each school year.

4.2 School Progress Monitoring and Goal Achievement

Monitoring of school progress toward goals in CISDM (including metric data) is entered at a minimum of once every grading period and recorded as a Review. Progress Monitoring and Goal Achievement are located on the Site Coordinator Dashboard in the School Activities area by clicking on the School Needs Assessment & Support Planning icon, shown below.

After clicking the icon, a list of schools to which the user is assigned will be displayed. The action gear next to the school has several options; to navigate to Progress Monitoring you will select School Needs Assessment Data.



The screen that opens is the School Needs Assessment Summary where the Needs Assessment, Support Plan, Resource Map and Progress Monitoring can be accessed.

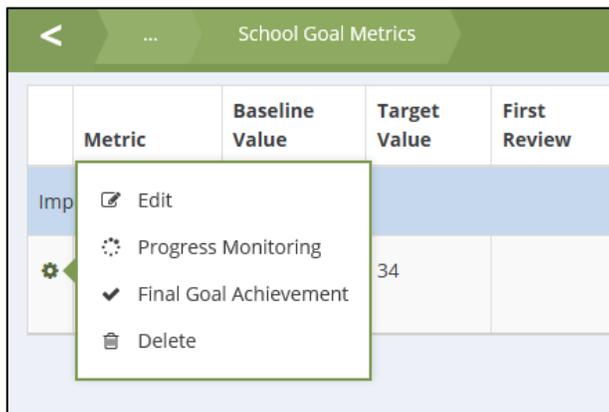
School Year	Review/Edit School Needs Assessment	School Support Plan	Resource Map	Progress Monitoring	Print School
2019/2020 SY	★ Review/Edit School Needs Assessment	★ School Support Plan	🕒 Resource Map	🔄 Progress Monitoring	🖨️ Print S
2018/2019 SY	★ Review/Edit School Needs Assessment	★ School Support Plan	🕒 Resource Map	🔄 Progress Monitoring	🖨️ Print S

It's important to remember that each row represents an individual goal metric that should have an entry every grading period. Click on the Progress Monitoring button in that row. The School Goal Metrics table below captures the entries made throughout the school year.

Metric	Baseline Value	Target Value	First Review	Second Review	Third Review	Fourth Review	Latest Progress	Achieved Value	Goal Achievement
Improve Academics									
⚙️ Promotion Rate	30	34							

Note: School progress monitoring entries can be made for up to six (6) grading periods; however, as of the publication of this guide, only four are displayed on the School Goal Metrics summary.

To track the school's progress for a given period, click on the action gear next to the metric name and choose Progress Monitoring, as shown below.



School Goal Progress Monitoring

Filters

Metric: Improve Academics - Promotion Rate

Baseline Date: 04/01/2019 Baseline Value: 30

Target Date: 05/08/2019 Target Value: 34

Data Scale and Source: 234234

+ Add Row

	Review Date *	Grading Period *	Provided Tier I Supports Related to This Goal? *	Progress Towards Goal *
<input checked="" type="checkbox"/>	9/29/2019	1st Grading Period	Yes	Progressing
<input checked="" type="checkbox"/>	9/29/2019	6th Grading Period	Yes	Progressing

The top half of this form presents the information as entered in the School Support Plan for the Goal, Metric, Baseline and Target set dates, and Baseline and Target values.

The bottom half of the form is where the progress entry will be made. The Progress Monitoring area allows the user to enter several required fields. Click the Add Row button to create a new entry or check the box next to an existing entry to open that row.

+ Add Row

	Review Date *	Grading Period *	Provided Tier I Supports Related to This Goal? *	Progress Towards Goal *
<input checked="" type="checkbox"/>	09/29/2019	<input type="text"/>	<input type="text"/>	<input type="text"/>

Numeric Value:

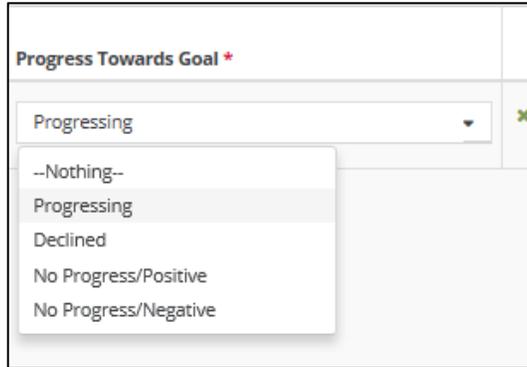
Notes:

The **Review Date** should reflect the period from which this student’s metric data came (e.g., the end of the grading period or the date he took a standardized test). This date must be different for each progress entry done for a given metric.

The **Grading Period** dropdown provides the list of grading periods for which data will be documented (refer to the screenshot below). If your school is on a quarterly schedule, you will only need four grading periods, if your school uses trimesters, you will use three, and so on.

- Nothing--
- 1st Grading Period
- 2nd Grading Period
- 3rd Grading Period
- 4th Grading Period
- 5th Grading Period
- 6th Grading Period

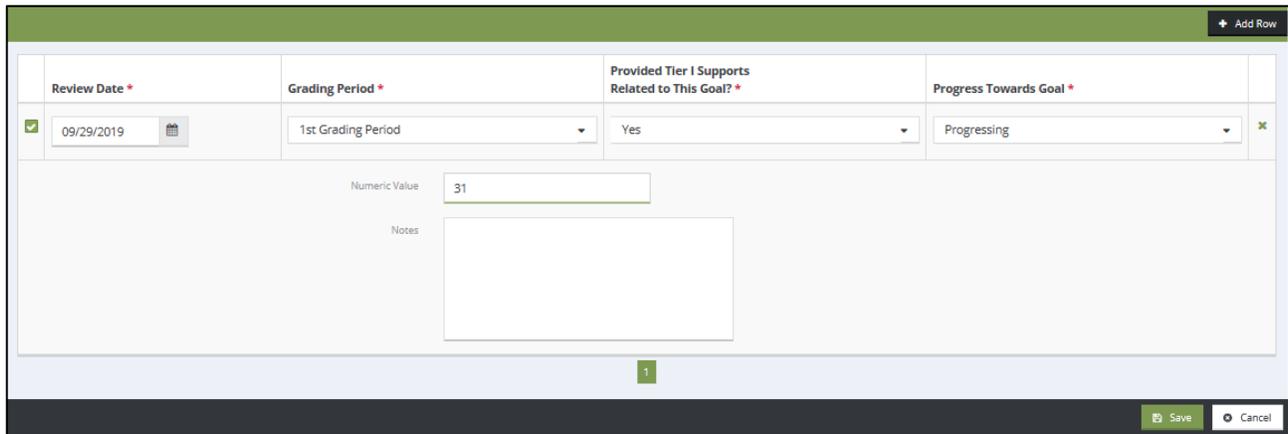
The field Provided Tier One Supports Related to this Goal? Requires a Yes or No response. The Progress Against Goal dropdown list is shown in the screenshot below.



The **Metric Value** field will often require a number, as in the above example of Academics – Promotion Rate, but other times, the relevant data might be alphabetical characters, as in a letter grade. It’s possible that you don’t have a metric value available each grading period; if that’s the case, you can leave the field blank.

Note: Review Submissions can be entered for a past date but not a future date. Review Dates for multiple reviews must have different dates. For example, if a progress monitoring entry is made for the First Grading Period with a date of January 5 and for the Second Grading Period with the same date, the system will not properly display these data.

A completed review is shown below. If it necessary to add multiple reviews at one time, click on Add Row (shown below) to add another one before saving. Once all required fields have been entered in each row, click Save. A review can be deleted by clicking the X on the right-hand side.



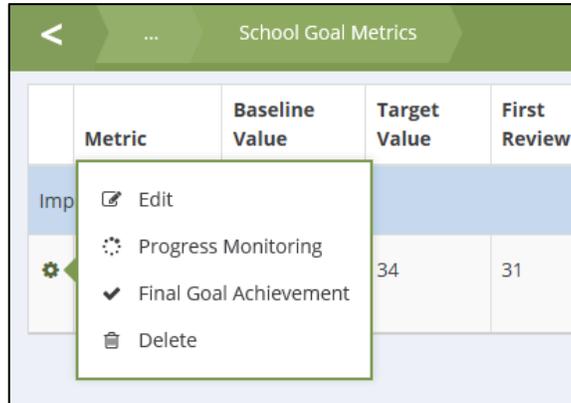
Once a review is performed for any of the Goals/Metrics, the value entered will appear in the summary table in its respective row and column, as shown in the screen shot below. If you skipped the metric value field, nothing will appear in that cell.

School Goal Metrics										
Metric	Baseline Value	Target Value	First Review	Second Review	Third Review	Fourth Review	Latest Progress	Achieved Value	Goal Achievement	
Improve Academics										
Promotion Rate	30	34	31				Progressing			

4.2.1 School Final Goal Achievement

Goal Achievement should be documented once final data for the school have been collected, typically after the end of the school year.

From the School Goal Metrics screen located through the School Needs Assessment & Support Planning icon, click on the action gear and choose Final Goal Achievement.



The Goal Achievement form, shown below, captures all final information related to the Goal identified from the School Goal Metrics form.

Goal: Improve Academics Metric: Promotion Rate

Baseline Date: 04/01/2019 Baseline Value: 30

Target Date: 05/08/2019 Target Value: 34

Please note the status and date of final goal achievement.

Goal Achievement: [Dropdown] Achievement Date: 09/29/2019

Final Metric Value: [Text Field]

Notes: [Text Area]

There are three fields on the form that require a response to submit Goal Achievement. The Goal Achievement dropdown allows you to indicate whether the school met the target value documented in the support plan, didn't meet the target but made substantial progress during the school year, or didn't meet the target and demonstrated no substantial progress. If needed, you can use the Exited Within Same Grading Period Enrolled option if you aren't able to assess goal achievement (N/A). *Note: Please ask your data administrator if this is relevant to your situation; for example, if CIS leaves the school mid-year.*

Goal ★

Achievement

Final Metric Value ★

Notes

- Nothing--
- Goal Met
- Goal Not Met, With Progress
- Goal Not Met, No Progress
- Exited Within Same Grading Period Enrolled

The Final Metric Value field is based on the most recent metric data (typically, the end of the school year, but final data can be entered earlier for some metrics). The Achievement Date is defaulted to the current date but should reflect when the goal was achieved. Notes can also be entered at the bottom of the form. Click Save on the form to submit the Goal Achievement.

4.3 Site Coordination Entry

This summary and entry area allow the user to document and view Site Coordination entries, which are supports provided to a school by its Site Coordinator that do not directly involve students.

Site Coordination - Summary
+ Add New SC Entry

 To add a new Site Coordination entry navigate to the top right hand corner of this form and click on the Add New SC Entry button.

Date  through 

School Where Site Coordination Occurred ★

Total Rows: 5
Search

	Date	Type of Site Coordination	School Where Site Coordination Occurred	Number of Hours
	8/31/2017	School Support Plan Development	CIS Provider School	2.00
	8/27/2017	Community Partner Coordination	CIS Provider School	3.00
	8/10/2017	School Support Team Meetings/Consultation	CIS Provider School	1.00
	8/9/2017	School Support Plan Adjustment	CIS Provider School	1.00
	8/2/2017	Community Partner Coordination	CIS Provider School	2.00

To add a new Site Coordination entry, click on the Add New SC Entry button on the top right-hand corner of the form.

The Site Coordination Entry form, shown below, captures information related to a specific site coordination type. This form has required fields that have been filled in below. It also has fields that have been defaulted (Category, Primary Provider Type) that cannot be edited. Once all required information has been entered, click Save to submit.

Site Coordination Entry

Date ★ 09/27/2017

School Where Site Coordination Occurred ★ Fake School

Category ★ Site Coordination Type of Site Coordination ★ Reporting – School Leadership

Primary Provider Type ★ CIS Staff

CIS Staff eacevedo

Number of Hours ★ 1

Was the School Support Plan Adjusted? ★ No

Note

Save Cancel

4.4 Entering/Editing Batch Supports

4.4.1 Tier I Supports

The Tier I summary form is located on the Site Coordinator Dashboard and provides a view of all entered Tier I entries by the school where the support was provided based on a selected date range. Because Tier I entries can span multiple dates, the date range view allows the Site Coordinator to enter a “Begin Date” and an “End Date” for an entry.

Below, we can view all Tier I entries provided from 07/01/2017 through 06/30/2018 at the school ‘ABC Elementary’. Indicated below with a red box are the “Begin Date” and “End Date” columns that will help summarize those Tier I entries that took place on a single date and those that took place over multiple dates.

Tier I Support - Summary + Add New

Filters

To add a new Tier I level support navigate to the top right hand corner of this form and click on the Add New Tier I Support button.

Date Range 07/01/2018 through 06/30/2019

School Where Support Was Provided ★ ABC Elementary

Total Rows: 24 Legacy Tier I Entries Search

	Begin Date	End Date	Support Category	Student Support	Activity	School Where Support Was Provided	Number of Students Served	Number of Parents Served	Number of Hours	Value per hour (\$)	Total Value of Time	BatchID
	1/3/2019	1/3/2019	Enrichment/Motivation	Field Trips		ABC Elementary	50		5.00	\$24.69	123.45	40224
	12/28/2018	12/28/2018	Behavioral Interventions/Modifications	Bullying/Violence Prevention	Gretchen's group	ABC Elementary	3		4.00	\$24.69	98.76	39323
	12/28/2018	12/28/2018	Behavioral Interventions/Modifications	Bullying/Violence Prevention	Gretchen's group	ABC Elementary	66		66.00	\$24.69	1629.54	39330

To add a new Tier I Support, click on the “Add New” button on the top right-hand corner of the summary form.

The Tier I Support Entry form captures information related to schoolwide supports. Additionally, this form records individual participation for case-managed students only. The screen shots below are broken up into specific areas with data populated for all required fields.

Below, the top area of the entry form captures information related to the type of support provided.

The screenshot shows the 'Tier I Support Entry' form with the following fields populated:

- Begin Date:** 08/18/2019
- End Date:** 08/18/2019
- Support Category:** Behavioral Interventions/Modificat
- Student Support:** Attendance Monitoring
- School Where Support Was Provided:** Fake School
- Number of Sessions:** 1
- When was this support provided?:** During School
- Individual or Group:** Group

The next area, shown below, captures information related to the providers of the Tier I support. Up to three providers can be selected, but only the primary provider is required.

The screenshot shows the provider selection section with the following fields:

- Please provide information for a primary provider**
 - Primary Provider Type:** Community Partner
 - Community Partner:** YWCA
- Please provide information for a secondary provider**
 - Provider 2 Type:** (empty dropdown)
- Please provide information for a tertiary provider**
 - Provider 3 Type:** (empty dropdown)

The Other Service Data area captures information related to the participation of the support overall. The # of Students Served is a required field and should reflect the total number of student participants.

The screenshot shows the 'Other Service Data' section with the following fields:

- # of Students Served:** 80
- # of Parents Served:** (empty field)
- # of Others Served:** (empty field)
- # Volunteers assisting (if any):** (empty field)
- Total Volunteer Hours:** (empty field)

The Amount and Value of Time area, shown below, captures information related to the duration and cost of the support in total. This area also captures information if a donation is provided, which can be done by clicking on the Add a Donation? checkbox to reveal the donation entry area. Shown below is the dropdown list named 'Identify Student Participants?' Responding 'Yes' allows students to be attached to the Tier I Support.

Amount and Value of Tier I Support Time

Total Number of Support Hours Average Hours per Session (auto-calculated)

Value per hour (\$) Total Value of Tier I Hours (auto-calculated)

Add a Donation?

Identify Student Participants?

Support Notes

By responding “Yes” to the ‘Identify Student Participants?’ dropdown list, you will see the student list being populated at the bottom of the form, shown below.

Identify Student Participants?

Support Notes

Total Rows: 25

<input checked="" type="checkbox"/>	Student	Enrollment Begin Date	Support Start Date *	Number of Sessions Attended *	Number of Hours	Case Note
<input checked="" type="checkbox"/>	Dias14, Valentino	9/11/2018		1	3.00	
<input checked="" type="checkbox"/>	Italiano, Mambo	7/2/2018		1	3.00	

The student selection area populates a list of students with enrollment dates that occur at any point during the start and end dates of the support.

To select students who received the support, click on the checkbox next to the Student Name. All students may be chosen by clicking on the checkbox in the top left corner of the table, indicated below. By clicking on the checkbox next to the student name, this will expand the student support detail, shown below.

Select All

<input checked="" type="checkbox"/>	Student	Enrollment Begin Date	Support Start Date *	Number of Sessions Attended *	Number of Hours	Case Note
<input checked="" type="checkbox"/>	Dias14, Valentino	09/11/2018	09/21/2018	1	2.00	Case Note
		Enrollment End Date <input type="text" value="12/31/9999"/>	Support End Date <input type="text" value="05/07/2019"/>			
<input checked="" type="checkbox"/>	Enrollment, Living	08/16/2018	09/21/2018	1	2.00	Case Note

Note: Supports cannot be entered outside of a student enrollment. If the form throws an error, review the Enrollment Begin and End dates for each student to modify any Support Start or End Dates that occur before or after a student was enrolled.

4.4.2 Batch Entry of Basic Needs/Resources

The structure of the Basic Needs/Resources form is like that of the Tier I Supports entry form. There is an additional field on the form to indicate the number of occurrences and the type of item provided, if any. The screenshot below shows 1 distribution of “Socks”.

Tier Level * Tier I Number of Occurrences * 1

Support Category * Basic Needs Type of Resource Provided * Clothing

Item Provided Socks

Within the “Amount and Value of Time” section, indicate the total number of units provided and the total value of all units. (E.g. 50 pairs of socks were distributed, valued at \$5 per pair)

Amount and Value of Time

Total * Average Hours per Session (auto-calculated)

Number of Support Hours

Value * Total Value of Support Time (auto-calculated)

per hour (\$)

Number of Units Provided Average Value per Unit (auto-calculated)

Total Value of All Units (\$)

When editing individual student support information, update the total number of sessions attended and total number of units received. (E.g. The student below received 5 pairs of socks during a single session.)

<input checked="" type="checkbox"/>	Student	Enrollment Begin Date	Support Start Date *	Number of Sessions Attended *	Number of Hours	Number of Units	Case Note
<input checked="" type="checkbox"/>	Dias14, Valentino	09/11/2018	08/20/2019	1	2.00	5	Case Note

4.4.3 Batch Entry of Tier II/III Supports

On this form, student level Tier II/III Supports are entered in batch. The example below shows a completed form to attach a single support to multiple students that are case managed.

The top of the form, shown below, captures data about the support. Required fields are School Year, Date, School Where Support Was Provided, Support Category, Support, Tier of Support, and whether it is Individual or Group. Tier II supports default to Group and Tier III supports default to Individual.

Tier II and III Batch Support Entry

Filters

School Year * 2019/2020 SY Date * 08/18/2019

Support Category * Academic Assistance School Where Support Was Provided * Fake School

Tier of Support * Tier II Support * Literacy

Individual or Group * Group Activity Reading Partners

When was this support delivered? Before School

The second area of the form, shown below, captures information related to the Providers of the support. Up to three provider types can be selected although only the primary provider is required. The Case Manager dropdown is not required but is necessary to view specific caseloads. For the students from the caseload to appear at the bottom of the form for selection, a case manager must be identified.

Tier II and III Batch Support Entry

To assign multiple students to a Tier II/III support choose Provider Type and search for the Case Manager. After, click on the 'Search for Students' button below to select a group of students that will receive credit for this support. The search will render students assigned to the Case Manager. If a Case Manager is not selected, the search will render all case managed students assigned to the School where support was provided.

Primary Provider Type: Community Partner
 Community Partner: Barry's Backpack Club

Secondary Provider Type: [Dropdown]

Tertiary Provider Type: [Dropdown]

Case Manager: Acevedo, Edsson
 Support Notes: [Text Area]

Like the [4.4.1 Tier I Supports](#) and [4.4.2 Batch Entry of Basic Needs/Resources](#) entry forms, there is a third section to capture information on the value of time of the Tier II/III support.

Students can be attached by clicking on the checkbox on the left of the Student Name, shown below. All students can be chosen by clicking on the checkbox in the top left corner of the table. Clicking the checkbox will open the student information area to provide further individual details as the support relates to the student. Required fields are Date and Number of Hours. Once all support information and student information have been added, click Save to submit the support.

Total Rows: 13 Select All

<input checked="" type="checkbox"/>	Student Name	Date	Number of Hours	Check In	Add Student Case Note
<input checked="" type="checkbox"/>	O'Fish, Filet	08/18/2019	2	Yes	Case Note
<input checked="" type="checkbox"/>	Student3, Fake	08/18/2019	1	No	Case Note

Note: Students that will be attached to the support are required to have already been enrolled and must have an active enrollment. The Date provided in the form should also align to the student enrollment dates to be eligible to receive supports. Lastly, the Case Manager dropdown selection will align with the school selected at the top of the form to show the caseload available for that case manager.

4.4.4 Deleting and Restoring Deleted Batch Services

Deleting batch services will delete supports for all students who are linked to the support entry. These services can later be restored. This can be done for all batch services (Tier I, Basic Needs/Resources or Tier II/III). To delete a batch service, click "Delete Batch and Services" from the action gear of the service to be deleted:

Tier II and III Batch Summary + Add New

Filters

Date Range: 07/01/2018 through 06/30/2019

School Where Support Was Provided: ABC Elementary

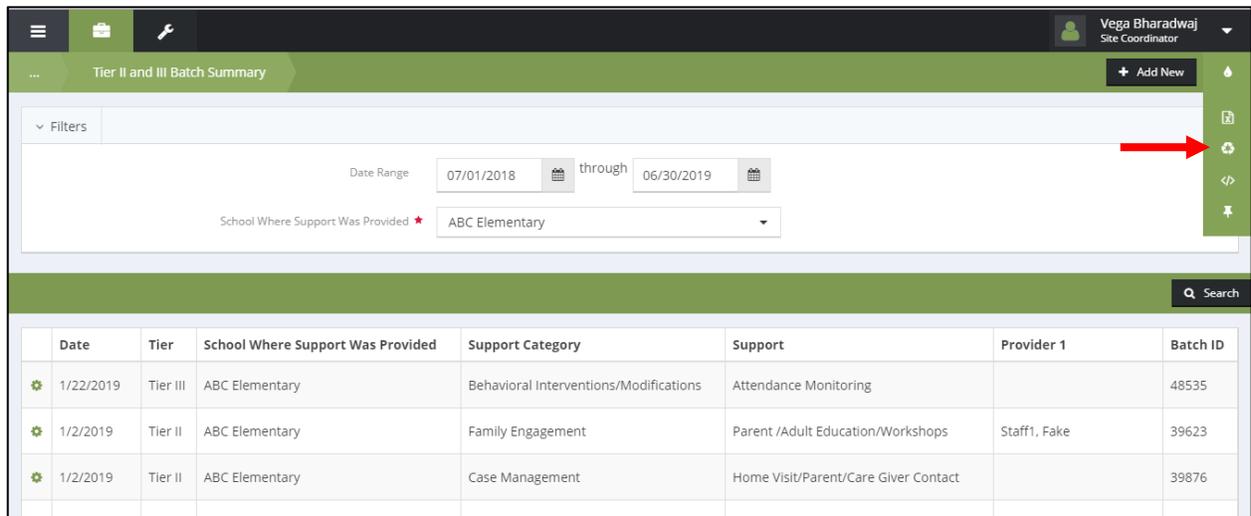
Search

	School Where Support Was Provided	Support Category	Support	Provider 1	Batch ID
	entary	Behavioral Interventions/Modifications	Bullying/Violence Prevention		48529
	entary	Behavioral Interventions/Modifications	Attendance Monitoring		48535

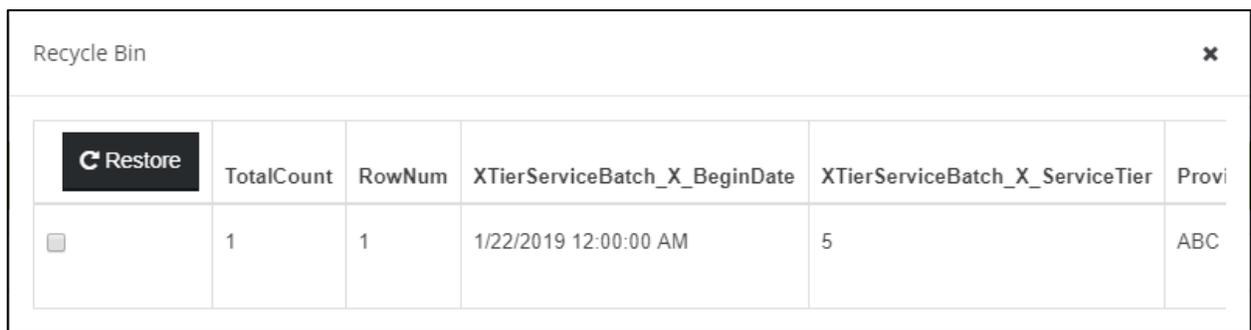
Context Menu:

- + Edit
- Delete Batch and Services
- Restore Deleted Services

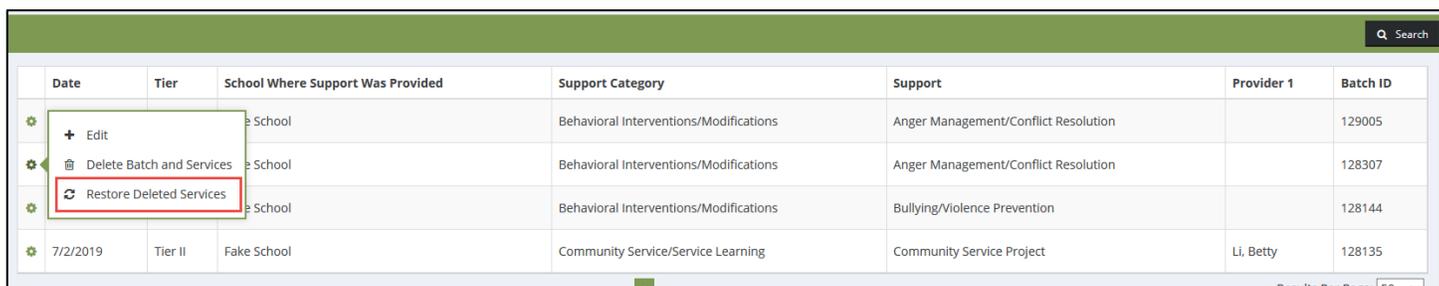
If you would like to restore the deleted service, click on the recycling icon from the teardrop menu on the top righthand side of the screen:



The deleted service should then appear. Click inside the checkbox and hit the “Restore” button to restore the service to the school.



After restoring the support, you will then need to restore the services to the student records previously attached to the support. **This step is required in order to restore services to the student records**, otherwise, there will be no students listed as participants on the support record. To complete this final step, click “Restore Deleted Services” from the action gear.

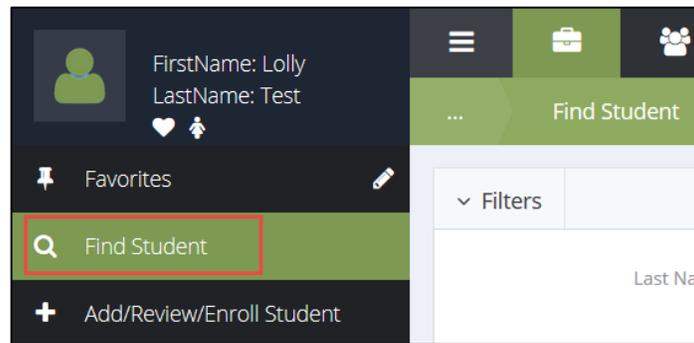


5 Locating a Student

The left-hand menu is found in the Case Management area of CISDM. It includes a link to Find Student, My Caseload, and Non-Case Managed Students.

5.1 Find Student

To search for a student, use the 'Find Student' button in the left-hand menu. If you are logging into CISDM for the first time, you may need to use this menu item to enable the remaining items on the left-hand menu.

A screenshot of the 'Find Student' search form. It features a 'Filters' dropdown and four input fields: 'Last Name', 'First Name', 'Birth Date' (with a calendar icon), and 'Student ID'. Below the fields is a search tip: 'The search will work best by entering minimal information in one or more fields. Entering a partial name or Student ID will result in a list of students with names/IDs beginning with the letters/numbers you entered. Clicking 'Search' without entering any student information above will produce a complete list of students in the affiliate.' A 'Search' button is located at the bottom right.

Enter any part of the student's Last Name, First Name, Student ID and/or Birth Date and click 'search' to view a list of students who match that criteria.

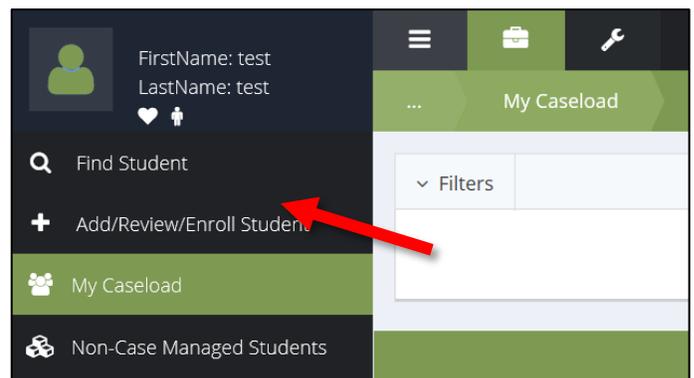
Note: The search functionality will consider any information input into any of the search areas. If a student's name includes special characters or blank spaces, then those must be present in the search. For a narrower search, enter more information about the student. For a broader search (recommended), enter partial information.

5.2 My Caseload



The My Caseload form displays all students assigned to the user by school year. To view or edit a student record, click on the hyperlinked student name.

Users can access the list of students who have been assigned to their case under the My Caseload on the left-hand menu. For a student to appear on the My Caseload form, the Case Manager Assignment must be designated to the student for the school year selected on the form filter. My Caseload can also be accessed from the [2.1.1.2 Site Coordinator Toolbox](#).

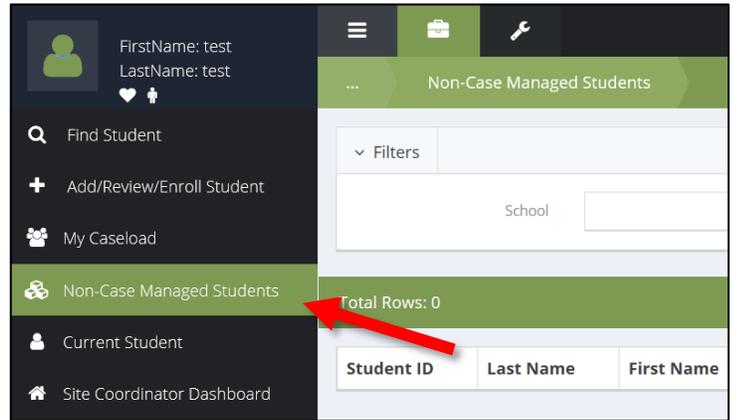


To view the data in spreadsheet form, click on Excel Export from the Tear Drop menu.

5.3 Non-Case Managed Students

Like the My Caseload form, users can view all students at a school who are Non-Case Managed.

Update the form filter by selecting the School and School Year specific to the group of students you would like to find and then click search. Click on the student's hyperlinked first name to be brought to their student dashboard.



Non-Case Managed Students

Filters

School: Fake School School Year: 2019/2020 SY

Total Rows: 3

Student ID	Last Name	First Name	Race	Gender	Grade	School	CIS Enroll Date	Referral Source	School Year	DOB
78910	Test	Talenti	White	Male	11th Grade	Fake School	7/1/2019	Teacher	2019/2020 SY	6/1/2005
123456123	Test	Dobby	Asian	Male	9th Grade	Fake School	7/3/2019	CIS Staff	2019/2020 SY	7/1/2007
92399	Yelnats	Stanley	Asian/Pacific Islander	Male	7th Grade	Fake School	7/2/2019		2019/2020 SY	7/1/2010

1 Results Per Page: 50

6 Opening and Exiting a Student Enrollment

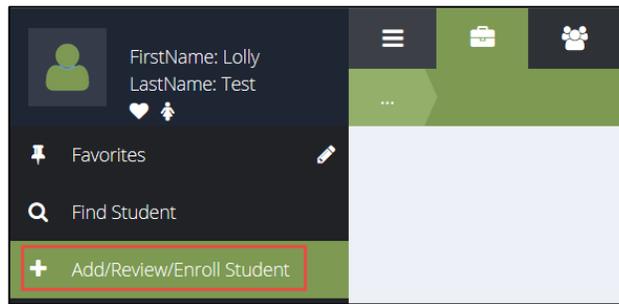
6.1 Add/Review/Enroll Student

This workflow adds a new student record to CISDM or enrolls an existing student into a new School Year. This workflow captures very basic information about the student including student demographic and contact details, parent consent/contact, referral reasons, and school enrollment. This step is a prerequisite to the [8.1 Creating Student Needs Assessment](#) and/or the [8.3 Goal Setting and Support Planning](#) workflows.

[Assessment](#)  Student Needs Assessment

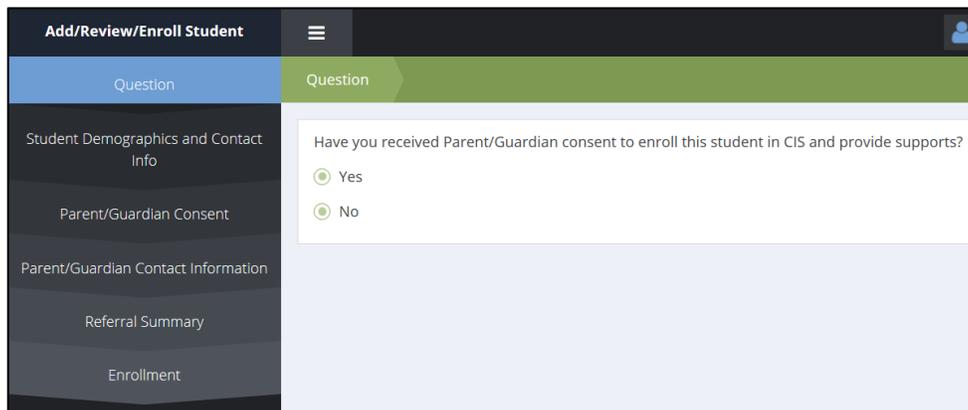
and/or the [8.3 Goal Setting and Support Planning](#) Goal Setting and

Support Planning  workflows.



Follow the steps below to complete the Add/Review/Enroll Student workflow. For information about how to save progress and return to the workflow at a later time, see [2.3 Understanding Workflows](#).

1. **Verify Parent Consent:** To add a new student or enroll an existing student, click on 'Add/Review/Enroll Student' in the left-hand menu. This will launch the Add/Review/Enroll Student Workflow in a new window. On the left side of the window, you will see a menu listing all forms within this workflow. The first form is "Question", where you will identify if Parent/Guardian consent has been received.



Note: CISDM requires parent/guardian consent be obtained before entering any student information into the system. The system will allow you to enter information on the Parent/Guardian Consent form, and upload if desired, which is discussed later in this workflow.

2. **Student Search:** The next window will ask you to check for duplicate students to see whether the student has previously been entered into CISDM. To do this, enter a student's first name, last name, **OR** student ID into this window and click '**Check for Duplicates**'.

Note: Duplicate check search works best when entering smaller portions of information to search for. Users may want to start the search by only completing one of the fields, for example, Student ID or Last Name. Duplicate Check will search for all matching information. If the student already exists and is chosen from the duplicate check window, all the rest of their demographic information will be filled in automatically.

3. **Duplicate Student Check (No Results):** In the results window, click ‘This is a new Student’ to start a new student profile. Continue through the Add Student Workflow by entering the student’s information. The example below shows a duplicate check that has returned no results.

Name	Birth Date	StudentID	Gender
------	------------	-----------	--------

4. **Duplicate Student Check (Multiple Results):** Students with matching information will display in a summary table. Clicking on that student record will update the workflow with that student’s previously entered information. The example below shows multiple records for a student that may share part of the same Last Name, in this case we searched for a student with the last name ‘Test’.

Name	Birth Date	StudentID	Gender
Test, Adam	04/05/2006	50061	Male
Test, Alice	11/19/2004	1587589	Female
test, anita	10/15/1991	2343243432	Female

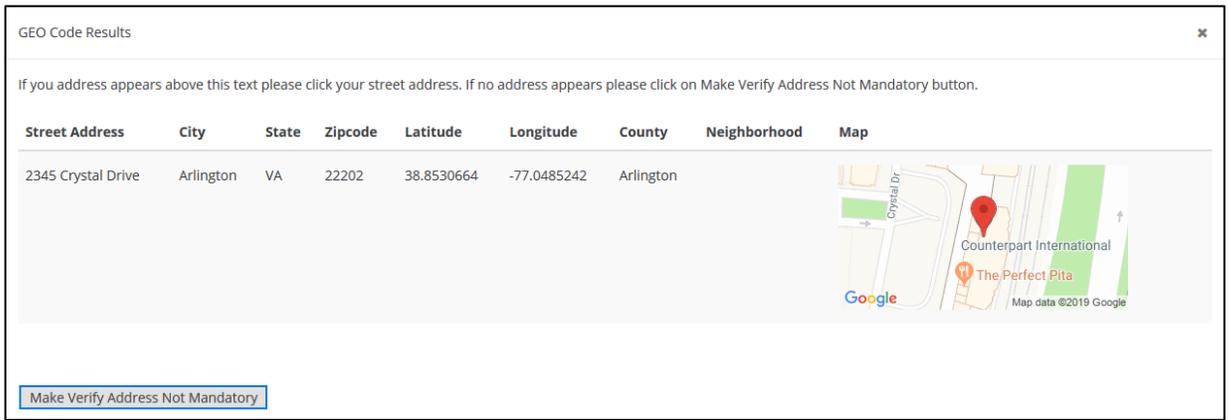
The example below displays the validation error message that appears when trying to save a new student with the same Student ID as an existing student.

5. **Student Demographics and Contact Info:** Continue through the workflow by entering or editing all required fields:
- New Student Information:** Birth Date, Sex/Gender, Language(s), Race/Ethnicity, Hispanic, Latino, or Spanish Origin, Previous Affiliate.

Note: Age is auto calculated based on the birthdate and will be marked invalid if the age is less than 3 or over 99 years old.

- Student Address Information:** Address and Zip code are required. When clicking on the 'Zip Code' field, a new window will open allowing you to search for the correct zip code by city and state. If you know the zip code, you do not need to enter city or state here.

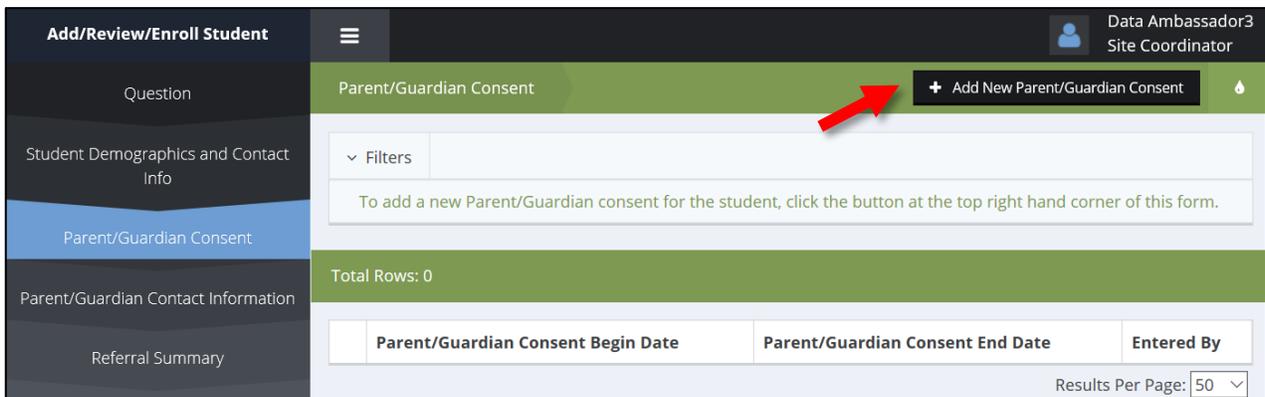
After entering Address and Zip Code, click 'Verify Address'. In the open window, select the appropriate address for the student. If the correct address does not appear, click the box next to "Make Verify Address Not Mandatory" to bypass verification and proceed to the next page.



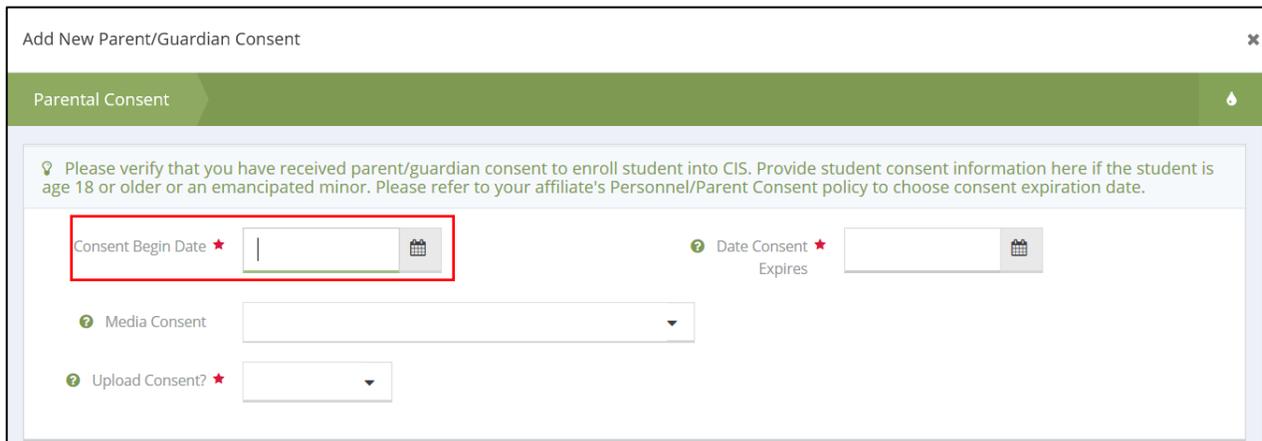
Note: If a student is homeless or living in temporary/unstable housing, another address, such as the school or a shelter, can be used. If 'Make Verify Address Not Mandatory' is selected, the system will prompt the user to verify the address each time the form is accessed.

c. **Student Contact Information:** Optional fields to enter student contact permissions and information including email and phone.

6. **Parent Guardian/Consent:** All past and current parent/guardian consents on record in the system will be displayed here for existing students. To add a new consent, click Add New Parent/Guardian Consent in the top right corner.

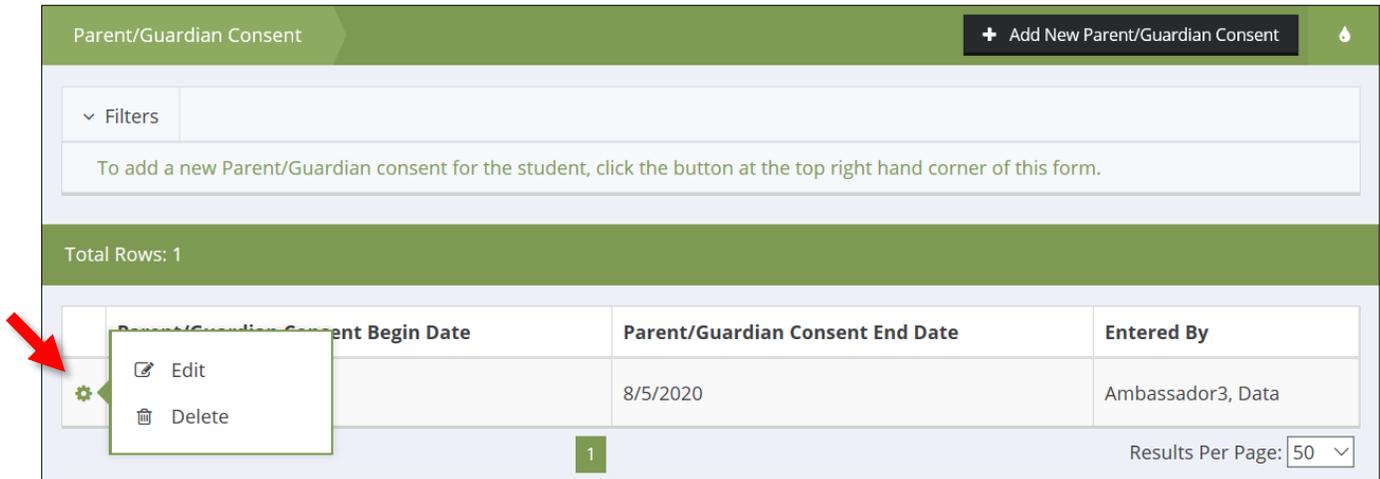


You may choose to upload the parent/guardian consent form directly into CISDM. After selecting "Yes", select "Browse" to upload a file directly from your computer to attach to the student record. A response is required but uploading a form is not, so if you are not able to upload a form select "No" under 'Upload Consent'.



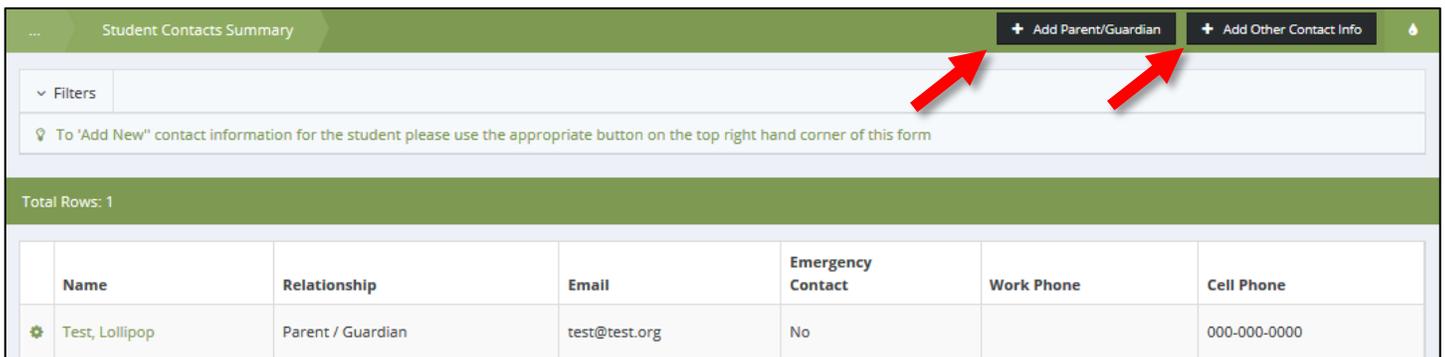
Note: “Consent Begin Date” cannot be a date in the future. “Date Consent Expires” is required, but please refer to your affiliate policy regarding parent consents if you are unsure how long they are valid.

Upon clicking Save, you will be returned to the Parent/Guardian Consent summary area where you will see a new row for the parent consent form you just entered. By clicking on the action gear of any identified row in the summary area, you will be given the option to edit the entry or to delete the entry.



- 7. Student Contacts Summary:** All past and current parent/guardian contact information on record in the system will be displayed here for existing students. To update an existing entry, click the action gear and then Edit. To add new or additional Parent/Guardian, click “Add/Parent Guardian”.

If you would like to add additional contact information, click on the launch button labeled “Add Other Contact Info”. All contacts will appear in the summary table.



- 8. Referral Summary:** All past and current referrals on record in the system will be displayed here for existing students. You will have the opportunity to add new/additional referral information or update existing data. To update an existing entry, click the action gear and then Edit. To add new or additional referrals, click Add New Referral on the top of the screen. Select the referral party, and any other information you would like to keep, including any current or past interventions or supports that the student is receiving. You can do this by adding a case note at the bottom of the page.

Referral Summary

[+ Add New Referral](#)

Filters

To document a new referral to CIS, click "Add New Referral" in the upper right corner. You may or may not have a new referral for the student each school year.

Total Rows: 0

Referral Date	Referring Party Name	Referral Source	Referral Reason(s)	Phone Number	View Case Note
Results Per Page: 50					

This form has two required dropdown lists to capture responses: Referral Reason and Referring Party. Referring Party contact information is optional. In addition, you can add Referral Notes or enter any notes as a Case Note through the button on the bottom left. Reference [9.2 Student Case Notes](#).

- Student Enrollment:** The final screen is the Enrollment form. Complete all required fields, including the case manager assignment for case-managed students.

Add/Review/Enroll Student

Enrollment

Enrollment Entry Date *

School Year * 2019/2020 SY

Grade * 4th Grade

Living Situation

Public Assistance Program Participation Choose Options...

Initiative(s) Choose Options...

CM or Non-CM * Case Managed

School * Fake School

Homeroom Teacher

Case Manager * Ambassador3, Data

To assign a Case Manager select the option below in the checkbox provided. Upon saving the enrollment record, CISDM 2.0 will create a "Case Manager Assignment" for the student based on the selected Case Manager starting as of the enrollment date.

Save

6.2 Batch Enrollment and Exit

6.2.1 Batch Enrollment

This form can be used to enroll multiple students at a time for a given school year. This option works for both Case Managed and Non-Case Managed students.

The current school year should populate automatically in the field called "New School Year". In the "School Year" field, select the school year from which the students had previously been enrolled, and from which school:

Batch Enrollment

Filters

All Student will be enrolled in the School Year shown below. This cannot be edited.

New School Year: 2018/2019 SY

Filter your selection criteria below. The list of Students will automatically filter based on your selection.

School Year: 2017/2018 SY | Previous Year's School: Fake School

Close Out Status: | Grade: |

Populating the New School and Start Date below will set these values for ALL Students shown below.

New School: Fake School for Performing Arts | Start Date: 04/03/2019 | Case Managed Status: Case Managed

Students highlighted in pink have an expired parent consent based on the Parental Consent End Date Column. Students highlighted in red do not have an updated Parental Consent form based on a null value in the Parental Consent Begin Date.

If the Case Managed option is selected, a Case Manager field will default to the current user's name. Verify that the Case Manager is assignment for each student prior to clicking save.

<input checked="" type="checkbox"/>	Last Name	First Name	Student ID	Grade	Enrollment Status	EOY Status	Closeout Status	Parental Consent Begin Date	Parental Consent End Date	Entity ID
<input checked="" type="checkbox"/>	Test	Froyo	28534FT	1st Grade	Assessments					248564
<p>New Program: 2018/2019 SY New Grade: 2nd Grade</p> <p>Case Managed Status: Case Managed New Case Manager: Bharadwaj, Vega</p> <p>New School: Fake School for Performing Arts Start Date: 04/03/2019</p>										
<input checked="" type="checkbox"/>	Test	Paint	2928PT	2nd Grade	Assessments					316905

You will have the option to change fields for individual students, including "New School", "New Grade", "New Case Manager", and "Start Date".

6.2.2 Batch Exit

At the end of the school year, **only students on a user's caseload** can be exited using the Batch Exit functionality. Students can only be exited from the school where they are currently enrolled. This form allows you to select the EOY Status and Closeout Status of each student. Click on the green check box to open the row for the student you would like to exit. Provide all required information and click save.

Batch Student Exit

Filters

All Students will be exited on the same date. Please provide each individual student's EOY Status, Closeout Status, and Postsecondary Plans, if applicable.

Exiting School Year * 2018/2019 SY Enrollment End Date * 04/03/2019

Filter your selection criteria for School and/or Grade below. The list of students will automatically update based on your selections. If nothing is chosen as a filter, the search will produce all currently enrolled students you case manage.

Current School Fake School for Performing Arts Current Grade Current Case Manager Bharadwaj, Vega

Total Rows: 2 Search

<input checked="" type="checkbox"/>	Student ID	Student Name	Grade	EOY Status *	Closeout Status *
<input checked="" type="checkbox"/>	248564	Test, Froyo	3rd Grade		
<input checked="" type="checkbox"/>	316905	Test, Paint	3rd Grade		

6.3 Student Enrollment/Exit/EOY Status

The Enrollment Status Summary page can be accessed by clicking on the Student Enrollment/Exit/EOY Status icon in the [2.1.1.4 Student Toolbox](#) area.

Student Toolbox

- Demographics and Contact Info
- Student Case Notes
- Parent/Guardian Consent
- Student Contacts
- Student Referrals
- Case Manager Assignment
- Check-In Entry
- Tier II/III Support Entry
- Student Enrollment/Exit/EOY Status**

Enrollment Status Summary

Filters

This summary provides a view of the student's enrollment status.

Total Rows: 3

<input checked="" type="checkbox"/>	017		
<input checked="" type="checkbox"/>	0/2018		
<input checked="" type="checkbox"/>	Enrolled	8/27/2018 - Open	

- Edit Enrollment
- Edit CM Intensity Level
- Exit/EOY Status
- Reopen Enrollment
- Delete

The action gear provides a pop-up menu with different forms related to the student enrollment.

6.3.1 Edit Enrollment

The Edit Enrollment form allows users to modify certain areas that are related to the enrollment of the student. The screenshot below shows the editable fields. Fields that are greyed out cannot be edited from this form, including the school year, enrollment status, school name, and affiliate.

Note: The Enrollment Exit date can only be edited in the Exit/EOY Status form, after a student is exited. It can't be edited in the form above.

6.3.2 Edit Case Management Intensity Level

The Case Management Intensity Level is entered in the Student Needs Assessment but can be edited from the student's Enrollment Status Summary. The Edit CM Intensity Level form only allows users to edit the Case Management Intensity Level dropdown. All other fields are display only and cannot be edited.

6.3.3 Exit/EOY Status

The Exit/EOY Status form allows users to officially exit a student from the program school year and end the case management assignment(s). The following fields are required: Begin Date, End Date, EOY Status, and Closeout Status.

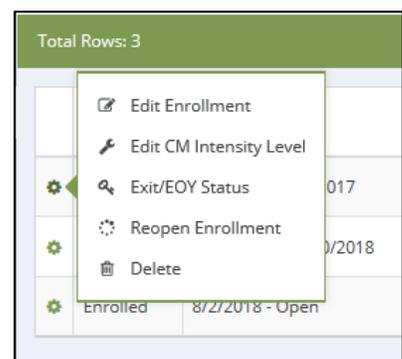
Upon Entering the EOY Status, additional fields will populate for the following dropdowns if selected:

- Graduated (option excludes grades PreK-11):
 - Did this student graduate within four years? (required)
 - Postsecondary Plans (required)
 - CIS Alumni Leadership Network: Cell Phone, Email
- GED
 - Postsecondary Plans (required)
 - CIS Alumni Leadership Network: Cell Phone, Email
- Other
 - Other EOY Status (required)

Note: The EOY Status option “Promoted” does not appear for students in grade 12. Additionally, it is strongly recommended that users input all data (supports, grading period reviews, Goal Achievement, etc.) to the student’s record before submitting the Exit/EOY Status forms. Student enrollments cannot be edited once exited unless enrollment is re-opened.

6.3.4 Reopen Enrollment

The Reopen Enrollment feature in the Enrollment Summary Status form reopens an “Exited” student enrollment for the selected school year, as long as the student doesn’t already have an open enrollment. After re-opening the enrollment, the status column will reflect “Enrolled” for the selected school year and student information such as metric data can be edited. The EOY Status previously selected will remain on the student record but can be edited from the Exit/EOY Status form.



6.3.5 Deleting Enrollments

The Delete feature in the Enrollment Summary Status form deletes the entire enrollment for a student, so this will rarely be done. This deletes all data related to the student’s enrollment, including supports, progress monitoring, and any information created using the Student Needs Assessment and Student Support Plan workflows. Deleted enrollments are moved to the recycling bin.

6.3.6 Student Transfer

Students can be transferred with the help of a Data Admin in CISDM. To start the process of a transfer, a user must provide [5.2.3.2 Final Goal Achievement](#) for the student and exit the student enrollment. Please reach out to your local Data Admin to perform the transfer to a different school within your affiliate.

7 Editing Student Information from the Student Toolbox

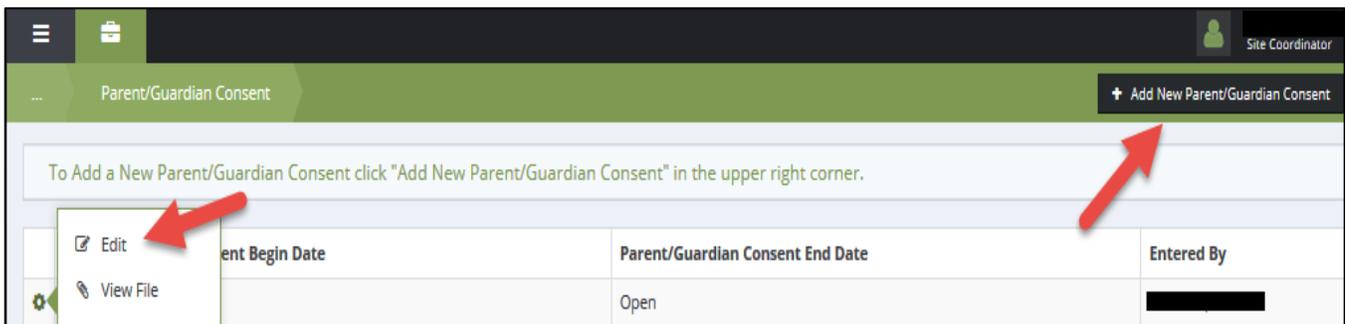
7.1 Demographics and Contact Info

This section allows you to edit student information such as student name, birthdate, gender, languages spoken, race, and contact information.

7.2 Parent/Guardian Consent

To access the Parent/Guardian Consent section, click on the Parent/Guardian Consent icon in the [2.1.1.4 Student Toolbox](#). This will display all current and past consents entered for the student.

To update existing information, click on the action gear next to the contact name, and select Edit. If a file was uploaded, click View File to preview or download that file.



7.3 Student Contacts

To access the contact information for the student's parents/guardians, as well as other individuals, click on the Student Contacts icon in the [2.1.1.4 Student Toolbox](#). This will display the contact information provided when the student was added to the database. All contact will appear in the summary table, edit options can be found by clicking on the action gear on the row for the contact you would like to edit and choosing the Edit option.

7.4 Student Referrals

Student referrals are entered either within the [6.1 Add/Review/Enroll Student](#) workflow or from the Student Dashboard. Referrals can be viewed by clicking on the Student Referrals icon within the Student Toolbox, as shown below.

To add a new referral for a student, click on the Add New Referral button on the top right-hand corner of the form. Reference [6.1 Add/Review/Enroll Student](#) to see how this is performed for a new student.

Referrals Summary + Add New Referral

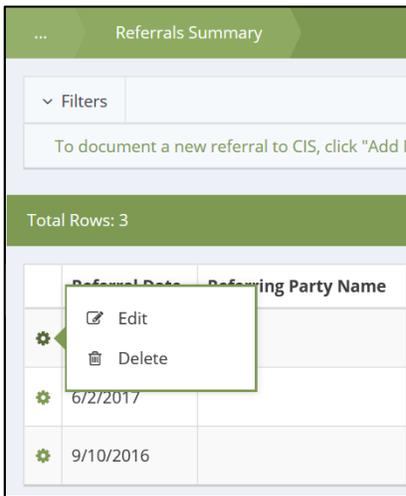
Filters

To document a new referral to CIS, click "Add New Referral" in the upper right corner. You may or may not have a new referral for the student each school year.

Total Rows: 3

	Referral Date	Referring Party Name	Referral Source	Referral Reason(s)	Phone Number	View Case Note
⚙	8/2/2018		CIS Staff	Poor attendance (e.g., missing 10 or more days or classes)		
⚙	6/2/2017					
⚙	9/10/2016					

To edit or delete the referral, use the action gear on the Referrals summary form. The Edit form will produce the already submitted information and allow you to add, change, and save any information on the form.



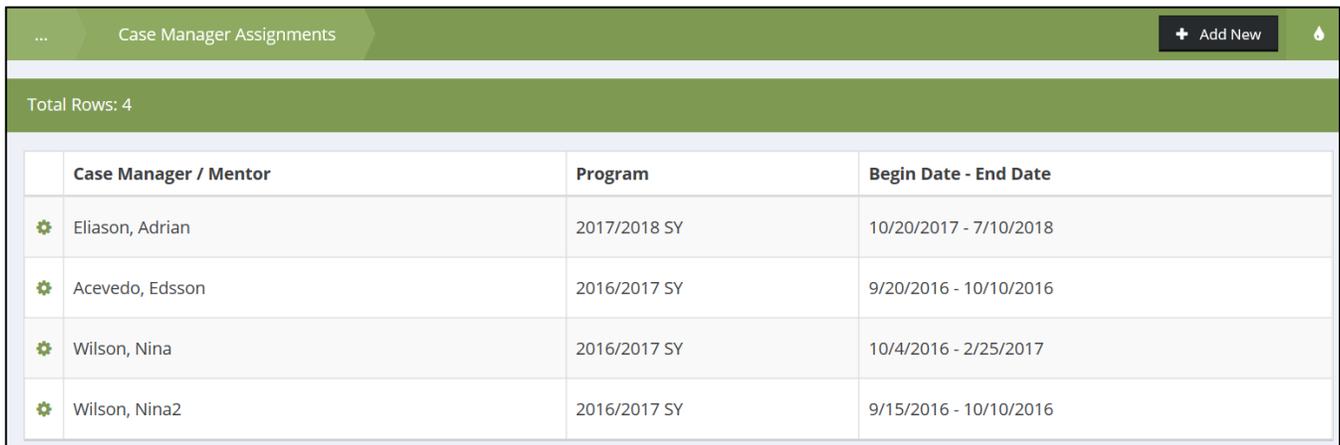
7.5 Case Manager Assignment

The Case Manager Assignment form displays all case managers that have been assigned to the current student. This form is located on the Student Dashboard and within the [2.1.1.4 Student Toolbox](#). To change assignments between case

managers also reference [7.5 Case Manager Assignment Case Manager Assignment](#)

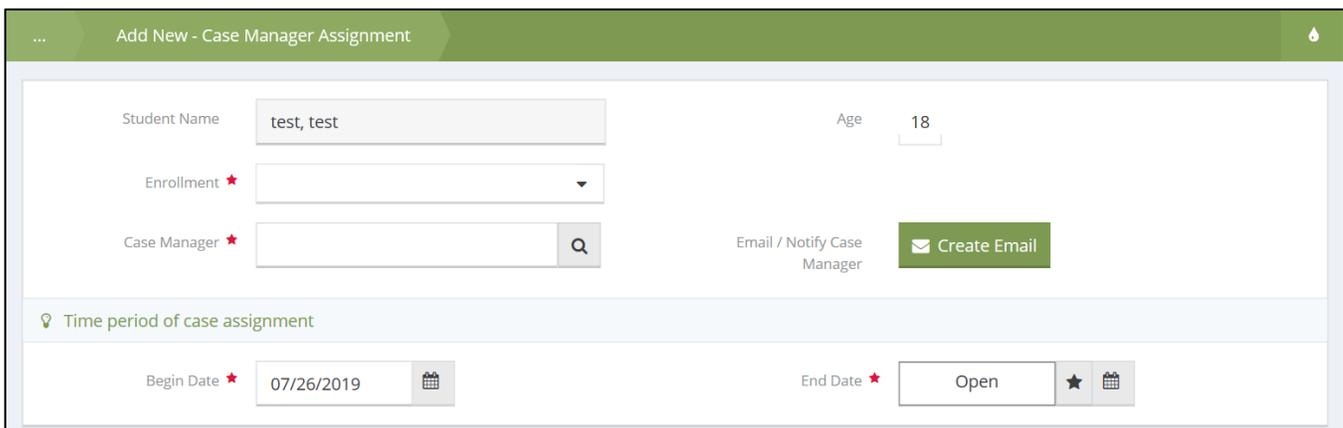
7.5.1.1 Adding new or multiple Case Manager assignments

Students receive a primary case manager assignment through enrollment in the [6.1 Add/Review/Enroll Student](#) workflow. To add multiple case managers, click on the Add New button in the top right-hand corner of the Case Manager Assignments summary form, shown below.



Case Manager / Mentor	Program	Begin Date - End Date
Eliason, Adrian	2017/2018 SY	10/20/2017 - 7/10/2018
Acevedo, Edsson	2016/2017 SY	9/20/2016 - 10/10/2016
Wilson, Nina	2016/2017 SY	10/4/2016 - 2/25/2017
Wilson, Nina2	2016/2017 SY	9/15/2016 - 10/10/2016

The Add New – Case Manager Assignment form, shown below, has four required fields.



Student Name: test, test Age: 18

Enrollment: [dropdown]

Case Manager: [searchable dropdown] Email / Notify Case Manager: [Create Email]

Time period of case assignment

Begin Date: 07/26/2019 End Date: Open

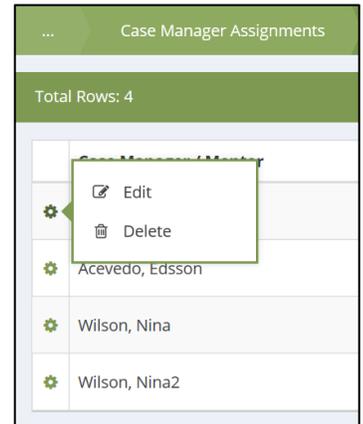
The Enrollment dropdown list shows the school year that the student is currently enrolled in. The Case Manager lookup allows users to search their affiliate for all case managers that provide direct services or supports. The Begin Date calendar field defaults to the current date and the End Date defaults to Open but can be edited for a specific timeframe.

7.5.1.2 *Editing and Deleting Case Manager Assignments*

From the Case Manager Assignments summary form, identify the assignment that needs to be edited and from the action gear click on Edit.

The Edit form will allow users to change any information about the assignment, including the End Date. Ending a case manager assignment will remove the student from the user's caseload but will retain the record of the assignment up to that date.

To Delete an assignment, click on Delete and this will remove the student from the caseload of the assigned case manager and eliminate the record of the assignment. Deleted assignments appear in the recycling bin.



8 Student Assessment, Planning and Monitoring from the Student Dashboard

8.1 Creating Student Needs Assessment

To access the Student Needs Assessment, click the Student Needs Assessment icon in the Student Toolbox, from the Current Student, Student Dashboard.

This will open the Student Needs Assessment Launch/Edit page. Each student enrollment year will be listed.

Launch Student Needs Assessment	Intensity Level	Enrollment Status	School Year Entry - Exit	School Year	Print Student Needs Assessment	School	Grade	Plan ID	Enrollment ID	EnrollmentServicePlan.Crea
	High	Exited	7/1/2016 - 12/1/2017	2016/2017 SY	Print Student Needs Assessment	CIS Provider Elementary School	First Grade	1838	25830	9/20/2016 3:36:00 PM
		Exited	10/20/2017 - 7/10/2018	2017/2018 SY	Print Student Needs Assessment	CaseWorthy	Pre-K	35133	148437	10/20/2017 2:07:00 PM
Launch Student Needs Assessment	Moderate	Enrolled	8/2/2018 - Open	2018/2019 SY	Print Student Needs Assessment	Fake School	Twelfth Grade	81946	195389	8/2/2018 1:20:00 PM

Total Rows: 3

Results Per Page: 50

A new Needs Assessment can be entered by clicking on 'Launch Student Needs Assessment'. Fields from an existing Needs Assessment can be edited from the action gear. Click 'Print Student Needs Assessment' to view a PDF version of the completed student assessment.

If the student has an assessment from a previous year, a prompt will appear to indicate whether to copy data from the previous assessment. If yes, select the magnifying glass for the 'Program Name' to search the School Year that you would like to use as a copy. Select the correct assessment year from the list of assessments available on the 'Copy Assessments' form.

Copy All Assessment Data

Do you want to copy all assessment data ?

Yes

No

Done

Select Family Members

#	Name	Select Program Name
<input checked="" type="checkbox"/>	Test RefWorkflow	<input type="text"/>

Copy Assessments

Date	Program Name	Type
<input checked="" type="radio"/> 8/21/2018	2018/2019 SY	At Entry

Note: If the student has multiple enrollments within system, each enrollment year and assessment will be displayed on the 'Copy Assessments' form. Review the Student Needs Assessment Launch/Edit summary to identify the assessment you would

like to copy prior to launching the workflow. If you need to back out of the workflow to review that information, simply click the 'X' to close the windows.

8.1.1 Attributes, Risk Factors, and Assets

Attributes: The first section is the identification of Student Attributes, shown below. All attributes default to unknown in a brand-new needs assessment. Users will provide a response to each listed attribute by selecting Yes or No within the Answer column. A Case Note can be added for additional documentation. Upon completion, click the save button at the bottom right to advance to the next section of the Needs Assessment.

The screenshot shows a web interface titled "test test - CIS Attributes Add New". It features a "Filters" dropdown, an "Assessment" dropdown set to "8/2/2018 - 2018/2019 SY - All Entry", and a "Case Note" button. Below this is a table with 14 rows. The table has two columns: "Issue Description" and "Answer". The "Attributes" section is highlighted in blue. Two rows are visible:

Issue Description	Answer
<input checked="" type="checkbox"/> Adjudicated/ Court-involved Youth	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Unknown
<input checked="" type="checkbox"/> Child of Active Duty Military	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Unknown

Risk Factors: All risk factors default to unknown in a brand-new needs assessment. Provide a Yes or No response for each risk factor listed on this form using the Answer column. A Case Note can be added for additional documentation. Upon completion, click the save button at the bottom right to advance to the next section of the Needs Assessment.

The screenshot shows a web interface titled "test test - CIS Risk Factors Add New". It features a "Filters" dropdown, a "Risk Factors" dropdown, and a "Case Note" button. Below this is a table with 18 rows. The table has two columns: "Issue Description" and "Answer". The "Individual Student Risk Factors" section is highlighted in blue. Two rows are visible:

Issue Description	Answer
<input checked="" type="checkbox"/> Aggressive / Violent Behavior	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Unknown
<input checked="" type="checkbox"/> Emotional / Mental Health Concerns	<input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Unknown

Assets: All assets default to unknown in a brand-new needs assessment. Provide a response by choosing an option in the Level/Frequency column from 0 (Not at all/Rarely) to 3 (Extremely/Almost always). A Case Note can be added for additional documentation. Upon completion, click the save button at the bottom right to advance to the next section of the Needs Assessment.

test test - CIS Student Assets Add New

Filters

Student Assets

Case Note Case Note

Total Rows: 13

Issue Description *	Level/Frequency *
Student Assets	
<input checked="" type="checkbox"/> Student feels good about his/her future.	<input checked="" type="checkbox"/> 0 <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> Unknown
<input checked="" type="checkbox"/> Student feels safe and secure where he/she currently lives.	<input checked="" type="checkbox"/> 0 <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> Unknown

8.1.2 Baseline Metric Data

In the next three forms, enter relevant baseline metric information into the Attendance Baseline, Behavior Baseline, and Course Performance/Academics Baseline sections of the workflow. To select a metric to enter, click on the checkbox next to the appropriate metric(s). The fields within each section will vary based on the metric selected. The Baseline Date and Baseline Value are required for all metrics.

The Attendance Rate metric is set up to calculate the percentage value for attendance based on the number of unexcused absences and the total days in the reporting period.

Metric *

Tardies

Attendance Rate

Number of Excused Absences (Days)

Number of Unexcused Absences (Days)

Days in Reporting Period

Baseline *

Baseline Date *

What time period does the baseline value represent?

Notes

See the List of Metrics for a full list of all available student metrics.

Note: For information related to editing ABC Baseline information see [8.3.4 Editing the Student Support Plan](#)

8.1.3 Case Management Intensity Level Selection

The last form allows you to choose the Case Management Intensity Level for the student. This is the only option in the form and a selection must be made to finish the Student Needs Assessment workflow.

Case Management Intensity Level Selection

Enrollment Entry Date * 08/02/2018

School Year * 2018/2019 SY

School Fake School

Case Management Intensity Level * Moderate

- Nothing--
- High
- Moderate

Note: For information related to editing the Case Management Intensity Level reference [6.3.2 Edit Case Management Intensity Level](#)

8.2 Editing Student Needs Assessment

After the Student Needs Assessment has been completed it may be necessary, from time to time, to update responses within the assessment. The edit forms can be found by clicking on the action gear and selecting the relevant 'Edit' form.

Student Needs Assessment Launch/Edit

Filters

This summary provides a view of the students current Enrollment status and Case Manager assignment. Use the gear widget next to the appropriate school year to Edit or Exit the student.

Total Rows: 2

Launch Student Needs Assessment	Intensity Level	Enrollment Status	School Year Entry - Exit	School Year	Print Student Needs Assessment
	Moderate	Exited	3/1/2017 - 8/10/2017	2016/2017 SY	
	High	Exited	1/10/2018 - 7/30/2018	2017/2018 SY	

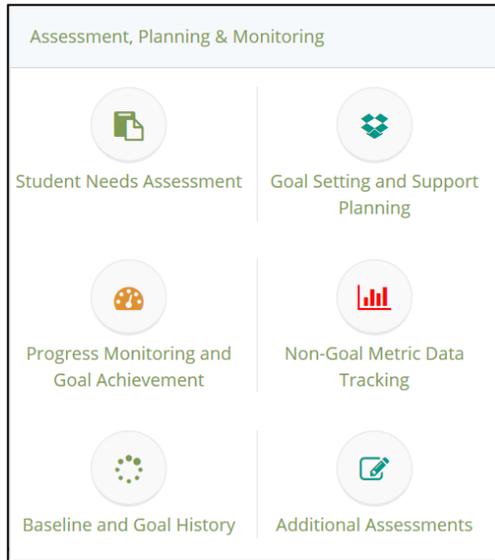
1

Note: The Student Needs Assessment can only be launched **for open enrollments**. Using the 'Edit Forms' function will be a valuable way of saving time if any part of the student information requires an update when exited. Baseline and Goal/Target edit forms can be found in the [8.3 Goal Setting and Support Planning](#) area. A student needs assessment can't be deleted as of the publication of this guide

8.3 Goal Setting and Support Planning



Student Support Plans are created and accessed by clicking on the Goal Setting & Support Planning icon.

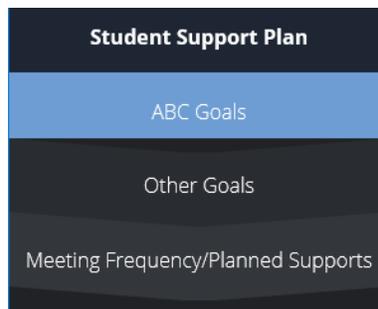


This will open the Student Support Plan summary. Each enrollment year will be listed. From this page a user can create the Student Support Plan, edit the student support plan (including Meeting Frequency and Planned Supports), and print the Student Support Plan as a PDF.

Affiliate	School Year	Goal Setting And Support Planning	Meeting Frequency and Planned Supports	Print Student Support Plan	School	Plan ID	Enrollment ID	Created Date
CaseWorthy	2017/2018 SY			Print Student Support Plan	CaseWorthy	35133	148437	10/20/2017
Communities In Schools National Office	2016/2017 SY			Print Student Support Plan	CIS Provider Elementary School	1838	25830	9/20/2016
Communities In Schools National Office	2018/2019 SY			Print Student Support Plan	Fake School	81946	195389	8/2/2018

If a new Support Plan needs to be completed, click the green button with a box icon within the same row as the school year you are creating the support plan for to launch the workflow.

After launching the Student Support Plan the Student Support Plan workflow form will pop up in a new window. On the left of the form will show each section of the workflow.



8.3.1 ABC Goals

The first part of the Student Support Plan workflow is where you will enter ABC goal(s). The Student Support Plan workflow allows you to view the baseline information entered in the Student Needs Assessment. Here, however, we will be deciding on a student goal and which metrics to track with the student during the school year.

Note: TQS requires that all students have at least one ABC goal.

For each metric that is selected as a goal, enter a Target, Target Set Date, and Frequency of Monitoring. There are additional fields including an area to add a Goal Narrative and Notes about the metric.

Once a target has been entered for all assigned goals, click the Save button at the bottom right corner to advance to the next section of the Student Support Plan

Note: If you are setting a target and goal for a metric that does not contain baseline data from the needs assessment, you'll need to enter the baseline value and date, as well.

Note: Certain information from the Student Needs Assessment passes over to the Student Support Plan. This information can be edited or viewed during the workflow. For example, the “Attendance Baseline Information” entered in the Student Needs Assessment will be displayed in the “Attendance Baseline/Target” Goals/Target area in the Student Support Plan.

8.3.2 Other Goals

The next section is where optional goals can be entered. This form allows you to address metrics outside of the standard Attendance, Behavior, Course Performance/Academics area.

Some of these include the following:

- Improve Social-Emotional Learning
- Improve High Risk Behavior
- Improve Career Readiness
- Improve College Readiness

After selecting any Other Goals click the Save button at the bottom right corner to advance to the next section of the Student Support Plan.

8.3.3 Planned Supports

The Planned Supports form allows you to individualize the plan for the student and choose which areas of support will help the student achieve their goal while working with CIS during the school year.

By clicking on the Add Support/Basic Need button, the planned supports form will appear and allow users to choose the supports and the tier of service that those supports will fall under. If at any point you would like to delete the planned support, simply click on the 'X' icon in the identified row to delete the submission before saving.

Note: At least one planned support is required in order to save the workflow. If the 'Goals' dropdown list is blank, 'Exit' the workflow to return to the ABC Goals form at the start of the workflow. At least one ABC goal is required to enter planned supports.

Once you have completed the Student Support Plan workflow, Student Support Plan Summary Page will now show information and icons in the summary table.

8.3.4 Editing the Student Support Plan

The Goal Setting and Support Plan workflow does not need to be restarted to edit an individual area of the plan. Edit forms for ABC Baseline, ABC Goal/Target, and Non-ABC Goal/Target are found on the action gear.

Total Rows: 3		
<ul style="list-style-type: none"> Edit Attendance Baseline Edit Behavior Baseline Edit Academics Baseline Edit SEL Baseline Edit ABC Goal/Target Edit Non-ABC Goal/Target 		School Year
		2017/2018 SY
	2016/2017 SY	
	Communities In Schools National Office	2018/2019 SY

For a student that requires a new goal after the Needs Assessment and Support Plan workflows have already been completed for the school year, a new target (and baseline, if needed) can be added to an existing Student Support Plan.

For example, if we wanted to adjust an existing baseline value for an Attendance metric, we would access the Edit Attendance Baseline link. If we wanted to enter a new goal for a student, whether or not the baseline value has already been entered, we would access the Edit ABC or Non-ABC Goal/Target link.

To delete a goal (target) for a given metric in the Edit ABC (or Non-ABC) Goal/Target form, without removing the baseline data, you can open the row for that metric and click the Clear Goal Data checkbox (found below Frequency of Monitoring) and Save.

Frequency of Monitoring ★ Once Per Grading Period ▼

Clear Goal Data

To edit the frequency at which you plan to meet with the student, or to add or remove the supports you planned, click on the icon found in the Meeting Frequency and Planned Supports column, shown below.

Total Rows: 3

Affiliate	School Year	Goal Setting And Support Planning	Meeting Frequency and Planned Supports	Print Student Support Plan	School
CaseWorthy	2017/2018 SY			Print Student Support Plan	CaseWorthy
Communities In Schools National Office	2016/2017 SY			Print Student Support Plan	CIS Provider Elementary School
Communities In Schools National Office	2018/2019 SY			Print Student Support Plan	Fake School

1

Note: A student support plan can't be deleted as of the publication of this guide.

8.4 Print Student Needs Assessment and Support Plan

On both the Needs Assessment and Support Plan summary forms, there is a button to print to PDF. The Print button navigates to a PDF review form with an option to download the PDF directly from the system, shown below. Click on the PDF export button to begin the export.



PDF Export

Date:

Student Name: Age:

Birth Date:

Assessment Date:

Contact Name:

Note: Ensure that pop-up blockers are disabled or pop-ups are allowed for the system.

This will download the system into the browser and can be viewed in PDF format.

fbe1d9b7-ae8f-4cc0-9e59-eed3c3f8ebe4 (1).pdf 1 / 6



Student Support Plan for Tommy Pickles

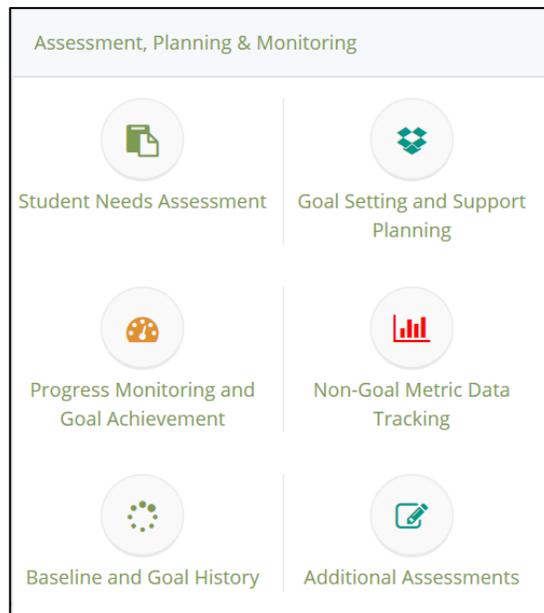
Student Demographic Profile

Personal Information:	
DOB:	10/03/2005 Age: 11 Gender: <input checked="" type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> Other:
Languages spoken:	English
Race/ethnicity:	<input checked="" type="checkbox"/> White Non-Hispanic <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> Black/African American <input type="checkbox"/> Asian/Pacific Islander <input type="checkbox"/> American Indian/Alaska Native <input type="checkbox"/> Multi-Racial: <input type="checkbox"/> Other:
Has student been involved with CIS before?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No When:
School-Related Information:	
Student School ID #:	1523668 Grade/Home Room Teacher:
Program Participation:	<input type="checkbox"/> Free/Reduced Price Lunch <input type="checkbox"/> English Language Learner <input type="checkbox"/> Special Education <input type="checkbox"/> Migrant Program <input type="checkbox"/> SNAP/Food Stamps <input type="checkbox"/> TANF <input type="checkbox"/> WIC <input type="checkbox"/> Other:
Family Information:	
Parent/Guardian Name:	Martha Pickles
Phone:	655-555-5555 Email:
Living Situation:	<input type="checkbox"/> Both Parents <input type="checkbox"/> Single parent Female/Male <input type="checkbox"/> Other Relative: <input type="checkbox"/> Foster care/group home <input type="checkbox"/> Shelter <input type="checkbox"/> Homeless <input type="checkbox"/> Alone <input type="checkbox"/> Unknown <input type="checkbox"/> Other:

Note: The PDF template used in the Student Support Plan printout was created by the National Office and meets TQS standards. Please fill out all parts of the Student Support Plan workflow and forms to ensure that the Student Support Plan prints properly.

8.5 Progress Monitoring and Goal Achievement

Monitoring of student progress toward their goals in CISDM (including metric data) is entered at a minimum of once every grading period and recorded as a Review. Progress Monitoring and Goal Achievement are located on the Student Dashboard in the Assessment, Planning & Monitoring area by clicking on the Progress Monitoring and Goal Achievement icon, shown below.



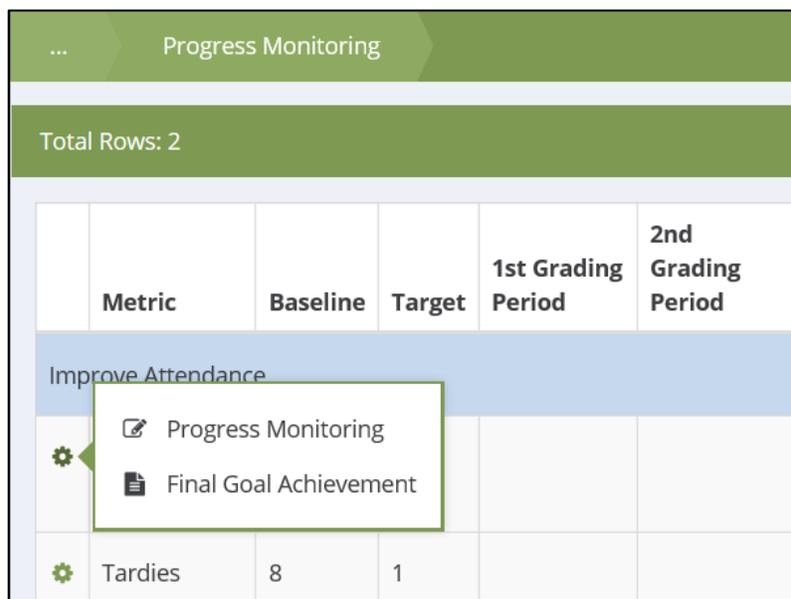
The Progress Monitoring table below captures the entries made during each review. It's important to remember that each row represents an individual goal metric that should have an entry every grading period.

Progress Monitoring													
Total Rows: 3													
Metric	Baseline	Target	1st Grading Period	2nd Grading Period	3rd Grading Period	4th Grading Period	5th Grading Period	6th Grading Period	Latest Progress	Achieved Value	Goal Achievement	Metric ID	
Improve Attendance													
Attendance Rate	0.00	0										576111	
Tardies	8	1			7				Progressing			315555	
Improve Academics													
Core Course Grades: Eng/Lang Arts/Reading/Writing	1	3										576338	

Results Per Page: 50

Note: Progress monitoring entries can be made for up to six (6) grading periods.

To track the student’s progress for a given period, click on the action gear next to the metric name and choose Progress Monitoring, as shown below.



The top half of the form is titled "Edit Metric" and contains the following fields:

- Goal: Improve Attendance
- Metric: Attendance Rate
- Baseline Date: 07/09/2019
- Baseline: 0.00
- Target Set Date: 07/26/2019
- Target: 0
- Goal Narrative: [Text Area]
- Goal Notes: [Text Area]

Below these fields is a note: "Please use the input areas below to perform a grading period review. Grading period review dates should reflect accurate dates as to when they were performed. For example, a 1st Grading Period Review should occur on a different date than a 2nd Grading Period Review."

At the bottom right of this section is an "Add Row" button.

The top half of this form presents the information as entered in the Student Needs Assessment and Student Support Plan for the Goal, Metric, Baseline and Goal dates, and Baseline and Target Values.

This screenshot is identical to the one above, showing the top half of the "Edit Metric" form with fields for Goal, Metric, Baseline Date, Target Set Date, Goal Narrative, Baseline, and Target.

The bottom half of the form is where the progress entry will be made. The Progress Monitoring area allows the user to enter several required fields.

The bottom half of the form is titled "Progress Monitoring" and contains the following fields:

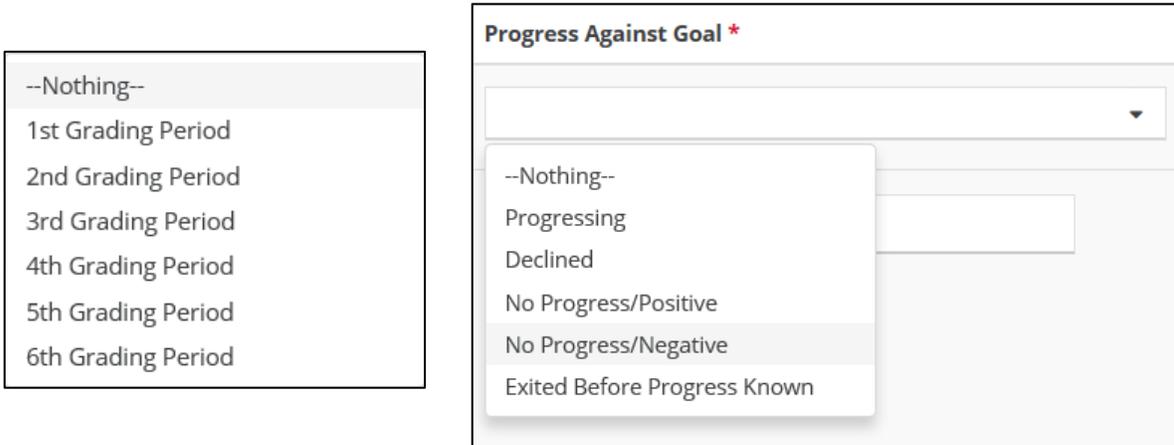
- Review Date: [Date Picker]
- Grading Period: [Dropdown]
- Progress Against Goal: [Dropdown]
- Case Note: [Text Area]
- Excused: [Text Input]
- Unexcused: [Text Input]
- Days in Reporting Period: [Text Input]
- Metric Value: [Text Input]
- Support Plan Adjusted: [Dropdown]

At the bottom right of this section is an "Add Row" button.

The Review Date should reflect the period from which this student’s metric data came (e.g., the end of the grading period, the date he took a standardized test, etc.). This date must be different for each progress entry done within a given metric.

The Grading Period dropdown list provides the list of grading periods for which data will be documented (refer to the screenshot below) it only goes to a 6th Grading Period.

The Progress Against Goal dropdown list is shown in the screenshot below.



The Metric Value field will often require a number (e.g., GPA), but other times, the relevant data might be alphabetical characters (e.g., letter grade). The example below shows the Attendance Rate metric, which contains a few numeric fields that CISDM uses to calculate the percentage.

The Support Plan Adjusted dropdown list is a required field that is defaulted to ‘No’ but should be changed to ‘Yes’ in the event a modification to the student’s support plan has been made, based on this latest progress entry.

Review Date *	Grading Period *	Progress Against Goal *	Case
<input checked="" type="checkbox"/> <input type="text" value="__/__/__"/>	<input type="text"/>	<input type="text"/>	
Excused <input type="text"/>		Unexcused * <input type="text"/>	
Days in Reporting Period * <input type="text"/>			
Metric Value <input type="text"/>			
Support Plan Adjusted * <input type="text"/>			

Note: Review Submissions can be entered for a past date but not a future date. Review Dates for multiple reviews must have different dates. For example, if a progress monitoring entry is made for the First Grading Period with a date of January 5 and for the Second Grading Period with the same date, the system will not properly display these data.

A filled in review is shown below. If it necessary to add multiple reviews, click on Add Row (shown below) to add another review row. Once all required fields have been entered, click Save.

The screenshot shows a form for entering a review. At the top right, there is a red-bordered button labeled '+ Add Row'. The form contains the following fields:

- Review Date:** A date picker showing 09/27/2017.
- Review Type *:** A dropdown menu with '1st Grading Period' selected.
- Progress Against Goal *:** A dropdown menu with 'Progressing' selected.
- Metric Value:** A text input field containing '2.6'.
- Support Plan Adjusted *:** A dropdown menu with 'No' selected.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

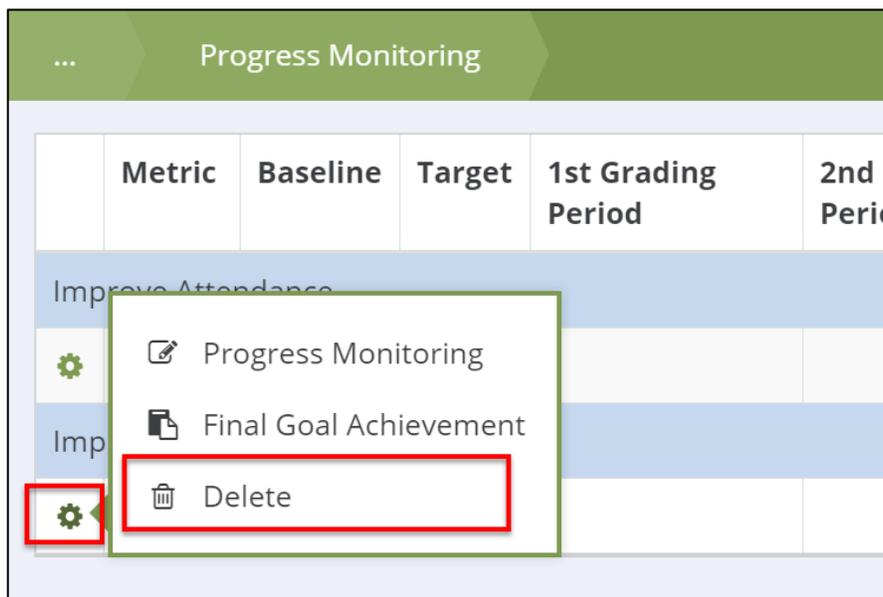
Once a review is performed for any of the Goals/Metrics, the value entered will appear in the summary table and its respective row and column as shown in the screen shot below.

The screenshot shows a 'Progress Monitoring' summary table. The table has the following columns: Metric, Baseline, Target, 1st Grading Period, 2nd Grading Period, 3rd Grading Period, 4th Grading Period, Latest Progress, Achieved Value, and Goal Achievement. The table is grouped into two sections: 'Improve Attendance' and 'Improve Academics'.

Metric	Baseline	Target	1st Grading Period	2nd Grading Period	3rd Grading Period	4th Grading Period	Latest Progress	Achieved Value	Goal Achievement
Improve Attendance									
Tardies	90	60							
Improve Academics									
GPA	1.4	2.0	2.6				Progressing		

8.5.1 Deleting a Goal

The Progress Monitoring summary table action gear menu also has an option to Delete, shown below.

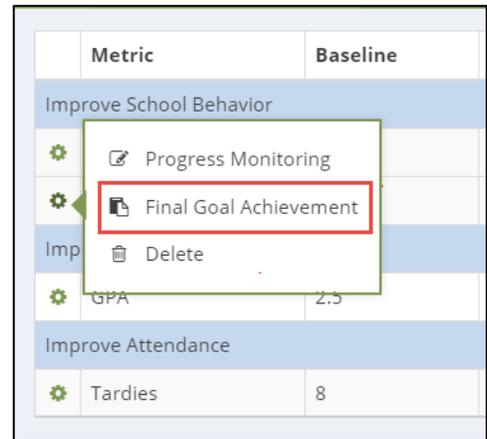


This option deletes all the information related to the goal, including the Baseline and any other information entered previously. This should only be performed if a target was entered during the Goal Setting and Support Planning workflow, otherwise, if a Goal will be stopped from being tracked, submit a Goal Achievement status.

8.5.2 Final Goal Achievement

Goal Achievement should be performed once final data for the student has been collected and the student will no longer receive supports or grading period reviews. For information on how to perform a student Exit, once Goal Achievement has been entered, reference [6.3.3 Exit/EOY Status](#).

From the Progress Monitoring screen, from the action gear, click on Final Goal Achievement.



The Goal Achievement form, shown below, captures all final information related to the Goal identified from the Progress Monitoring form.

Goal Achievement

Goal: Improve Academics Metric: GPA

Grade Scale: _____

Baseline Date: 06/10/2016 Baseline: 2.5

Goal Set Date: 02/08/2017 Target: 3.0

Please use the student's most recent metric data to determine whether he or she achieved this goal.

Goal Achievement ★: _____ Achievement Date ★: 08/24/2017

Final Metric Value ★: _____

Notes: _____

There are three fields on the form that require a response to submit Goal Achievement. The Goal Achievement dropdown list provides three responses, to indicate whether the student met the target value documented in the support plan, didn't meet the target but made substantial progress during the school year, or didn't meet the target and demonstrated no substantial progress.

Goal Achievement ★: _____

Final Metric Value ★: _____

Notes: _____

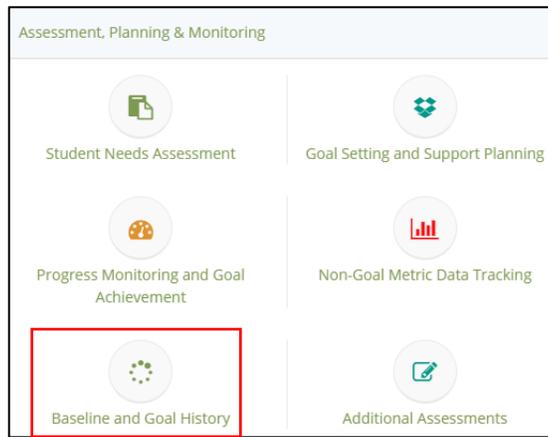
- Nothing--
- Goal Met
- Goal Not Met, No Progress
- Goal Not Met, With Progress

The Final Metric Value field is based on the most recent metric data. Finally, the Achievement Date is defaulted to the current date but should reflect when the goal was achieved. Notes can also be entered at the bottom of the form. Click Save on the form to submit the Goal Achievement.

8.6 Baseline and Goal History



The Baseline and Goal History form provides users with a ‘year-over-year’ look at student progress. The current enrollment year will always appear at the top of the table. The form itself is a view-only form and metrics and progress that appear here may not be edited. Once the enrollment year has passed, entries may not be edited unless an enrollment is re-opened. For more information, reference [6.3.4 Reopen Enrollment](#).

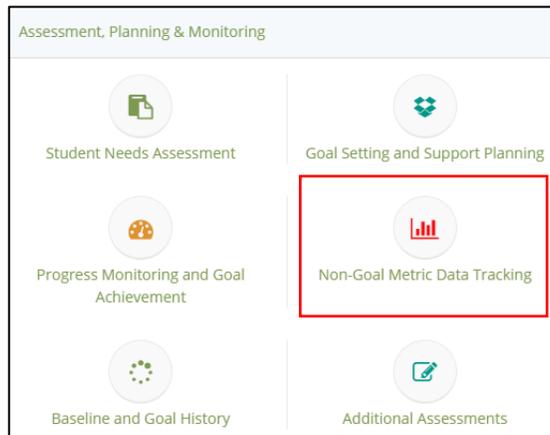


Metric	Baseline	Target	1st Grading Period	2nd Grading Period	3rd Grading Period	4th Grading Period	Goal Achievement
2017/2018 SY							
Improve Academics - Core Course Grades: Math 1	65						
Improve School Behavior - Conduct	20						
Improve Attendance - Tardies	90	60					
Improve Academics - GPA	1.4	2.0	2.6				
Improve School Behavior - Suspensions	120		0				
2016/2017 SY							
Improve Academics - Reading Level	4						
Improve School Behavior - Conduct	50	100	15	30			Goal Not Met, No Progress
Improve Academics - Core Course Grades: Eng/Lang Arts/Reading/Writing	4	222	374				Goal Met

8.7 Non-Goal Metric Data Tracking



Site Coordinators may track student data that are not linked to official student goals (targets). To access this form, click on the Non-Goal Metric Data Tracking icon found on the Student Dashboard in the Assessment, Planning & Monitoring area, shown below.



This form is similar in appearance to what is used for Progress Monitoring but with some slight and important differences. As mentioned earlier, this form will only capture those metric entries that have information entered for Baseline during the Student Needs Assessment. It also does not have access to enter Final Goal Achievement.

Metric	Baseline	1st Grading Period	2nd Grading Period	3rd Grading Period	4th Grading Period
Improve Academics					
Core Course Grades: Math 1	65				
Improve School Behavior					
Conduct	20				
Suspensions	120				

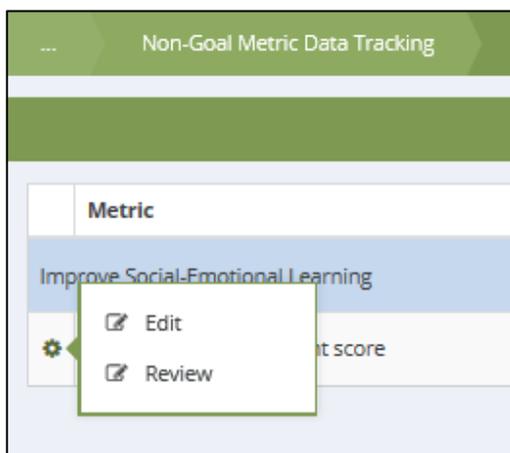
The action gear options, shown below, provide access to Edit, enter a Review, and Delete the baseline data.

Metric	Baseline	1st Grading
Improve Academics		
Core Course Grades: Math 1	65	
Improve School Behavior		
Conduct	20	
Suspensions	120	

- Edit
- Review
- Delete

8.7.1 Edit Non-Goal Baseline

To Edit a baseline for a Non-Goal metric, identify the metric on the form and, from the action gear, click on Edit, as shown below.



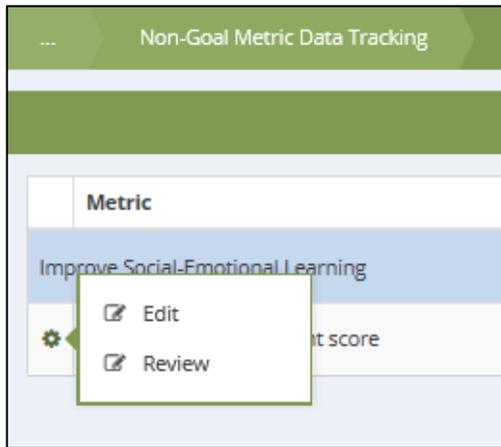
The Edit Non-Goal form, shown below, has three required entry fields before a baseline can be edited. The Baseline field shows the original or current baseline that can be edited. The Baseline Date can be edited to reflect either a past or future date, if necessary. The Edit Reason field is a text box where a user must provide a reason for this change, which is different than the Notes field on this form.

A screenshot of the 'Edit Non-Goal' form. The title bar is green with a white arrow pointing right. Below it is a white header area. The main content area has a light blue background. The form contains several fields: 'Metric' with a star icon and a text box containing 'GPA'; 'Baseline' with a star icon and a text box containing '2.1'; 'Baseline Date' with a star icon, a text box containing '07/21/2017', and a calendar icon; 'Notes' with a text area; and 'Edit Reason' with a star icon and a text area. There are also small icons in the bottom right corner of the text areas.

Once all required fields have been entered, click Save on the bottom of the form to submit the edit to the Non-Goal metric.

8.7.2 Entering a Review for Non-Goal Metrics

The Non-Goal Metric Data Tracking form also allows users to enter a grading period review. Identify the Non-Goal Metric and, from the action gear, click on Review and the system will navigate to the Non-Goal Review form.



 A screenshot of the 'Non-Goal Review' form. The top section contains four input fields: 'Metric Area' with the value 'Improve School Behavior', 'Metric' with 'Suspensions', 'Baseline Date' with '09/27/2017', and 'Baseline' with '120'. Below these is a light blue box with a lightbulb icon and text: 'Please use the input areas below to perform a grading period review. Grading period review dates should reflect accurate dates as to when they were performed. For example, a 1st Grading Period Review should occur on a different date than a 2nd Grading Period Review.' To the right of this box is an 'Add Row' button. The bottom section has a table with two columns: 'Review Date' and 'Review Type *'. The 'Review Date' row contains a checkmark, the date '09/27/2017', and a calendar icon. Below this are input fields for 'Metric Value' and 'Support Plan Adjusted *' with a dropdown menu set to 'No'.

The Non-Goal Review form is divided into two sections. The top half of the form, shown below, displays the information as entered in the Student Needs Assessment, this information cannot be edited here.

 A screenshot of the top half of the 'Non-Goal Review' form. It shows the same four input fields as the previous screenshot: 'Metric Area' (Improve School Behavior), 'Metric' (Suspensions), 'Baseline Date' (09/27/2017), and 'Baseline' (120). Below these is the same light blue box with the lightbulb icon and explanatory text.

The bottom half of the form allows for the entry of the review information. A blank row is shown below.

Review Date: 09/27/2017

Review Type: [Empty]

Metric Value: [Empty]

Support Plan Adjusted: No

+ Add Row

In the screen shot below, we have selected a Review Type and have also added the Metric Value associated with the amount of suspensions recorded during this review. If multiple reviews need to be added, click on the Add Row button to add another row. Once all required fields are entered, click Save to submit the progress monitoring “review”.

Review Date: 09/27/2017

Review Type: 1st Grading Period

Metric Value: 0

Support Plan Adjusted: No

+ Add Row

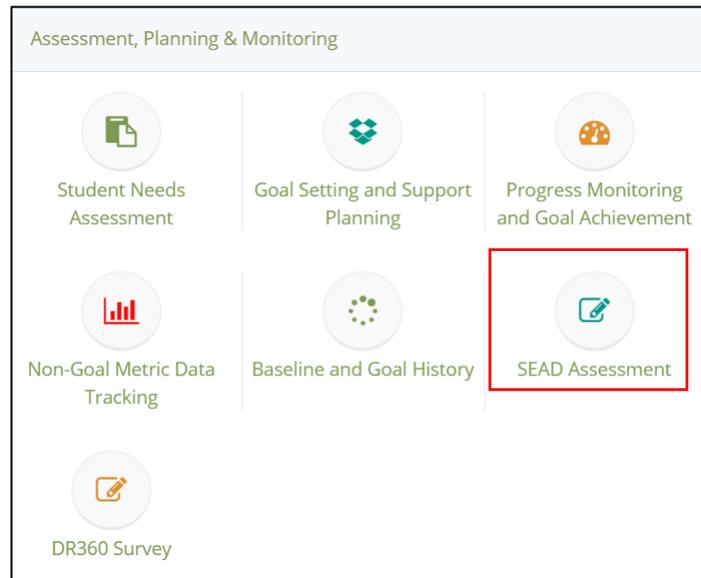
Save Cancel

The submission will now be displayed on the Non-Goal Metric Data Tracking table.

Metric	Baseline	1st Grading Period	2nd Grading Period	3rd Grading Period	4th Grading Period
Improve Academics					
Core Course Grades: Math 1	65				
Improve School Behavior					
Conduct	20				
Suspensions	120	0			

8.8 Additional Assessments

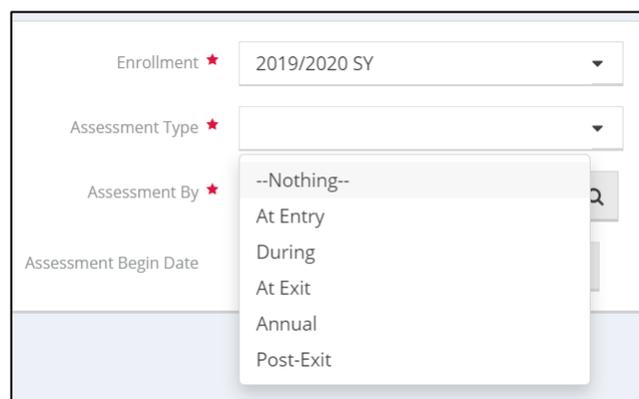
The SEAD and DR 360 Assessments can be accessed from the Student Dashboard by navigating to the Assessment, Planning & Monitoring section and clicking on those icons.



IMPORTANT! On the respective form when creating a New assessment, click on the green AssessmentID box and then on the green plus sign in order to confirm the correct school year and assessment date:



If this has not been done before completing the SEAD/DR 360 assessment, all assessment data will be cleared out.



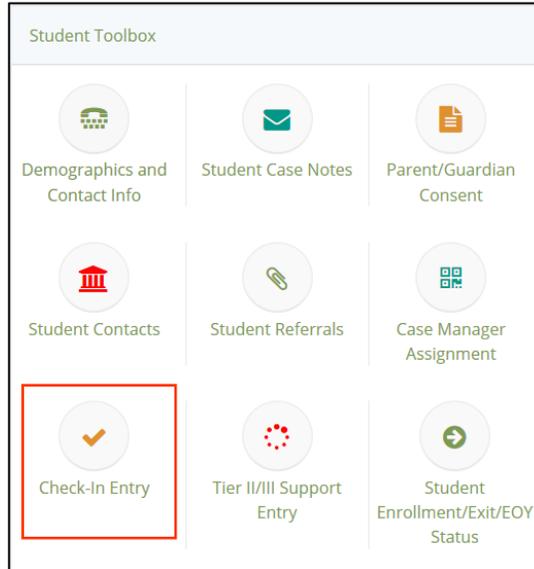
For more information on SEAD and DR 360, [see the user guides available on the NRC.](#)

9 Entering Individual Student Supports from the Student Toolbox

9.1 Check-In Entry

Check-Ins can be entered as a standalone support or included with Tiered entry support. Reference [9.3.1 Tiered Support with Check-In](#) for any individual student supports that include a Check-In.

Individual student check-in entries can be found in the Student Toolbox.



The Check-In Entry icon will take you to the Check-In Summary form detailing all check-in entries provided to the student. To add a new Check-In, click on the Add New Check-in Entry in the top right-hand corner of the form.

Date	Support	Provider Type	Provider Name	Case Note Reference Date	<input checked="" type="checkbox"/> Preview	School Year
Total Rows: 0						

Update all required fields and indicate whether the student support plan was adjusted based on this check-in. You may choose to provide additional context about the check-in and/or adjustment to the support plan with a Case Note.

The Check-In Entry form also allows you to enter a Case Note through the button at the bottom left. The Case Note form asks for the type of Case Note (e.g., General Case Note) and includes a text box where more specific information can be added. The text box also includes some common discussion topics:

- Goals
- Supports
- Progress
- Personal issues

After you have added your Case Note click the Save button at the bottom left.

Check-In Entry

School Year * [Dropdown]

Date * 07/26/2019 [Calendar Icon]

Support * Check-In

School Where Check-In was Provided * CIS Provider Elementary School [Dropdown]

Provider Type * CIS Staff [Dropdown]

CIS Staff * DataAmbassador3 [Search Icon]

Number of Hours * [Text Box]

Was the student support plan adjusted? * No [Dropdown]

Case Note(s): [Case Note Button]

Edit Case Note

CIS - Case Note (Add New)

Summary * Check-In Case Note

Type * General Case Note [Dropdown]

Body

Edit | Insert | View | Format | Table | Tools

Did you discuss the following topics with your student during this check-in?

Goals:

Supports:

Progress:

Personal issues:

p

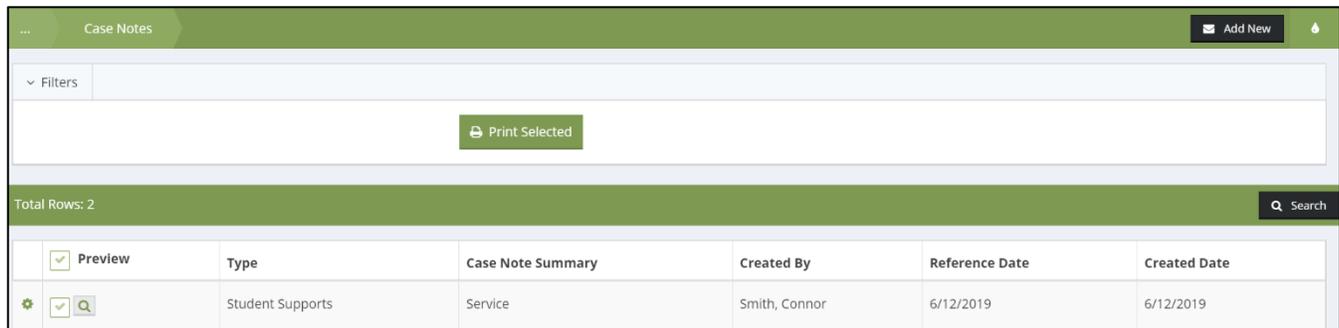
When all information is entered in the Check-In Entry Form, click the Save button on the bottom right-hand corner of the entry form to submit the entry.

9.2 Student Case Notes

Student case notes are available using the icon labeled Student Case Notes on the Student Dashboard (inside of the [2.1.1.4 Student Toolbox](#)). This will provide a summary of all the case notes for the student record being accessed, regardless of where they were entered in the system (e.g., student support, risk factors). Here, you can create a new case note or edit an existing one. The student case note summary can also be accessed from the 5 Most Recent Case Notes table.

Within this section, you can ‘Add New’ Case Notes, ‘Preview’ Case Notes, ‘Search’ for Case Notes by type, as well as ‘Print’ Case Notes. To add a new Case Note, click the ‘Add New’ button on the top right-hand corner of the window.

To preview a specific Case Note, select the magnifying glass next to the note.



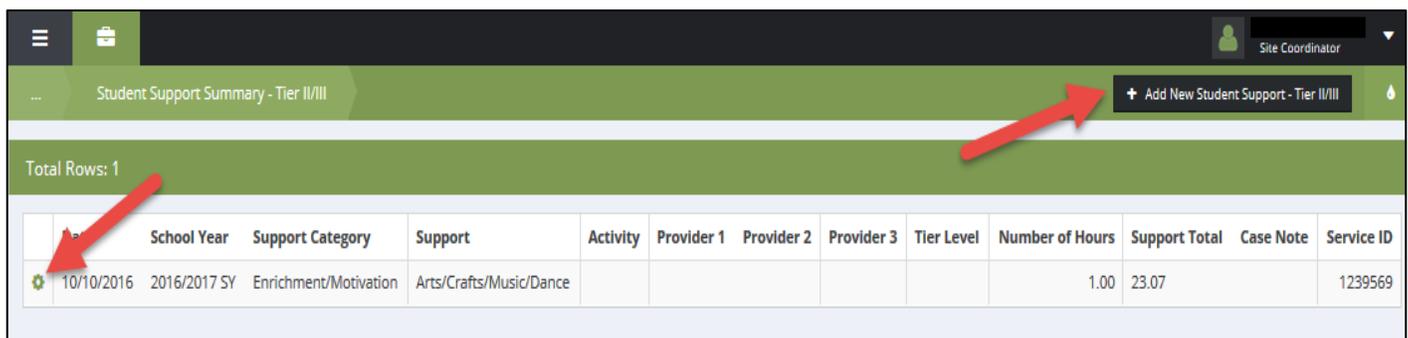
<input checked="" type="checkbox"/> Preview	Type	Case Note Summary	Created By	Reference Date	Created Date
<input checked="" type="checkbox"/> 	Student Supports	Service	Smith, Connor	6/12/2019	6/12/2019

To print Case Notes, select all Case Notes to be printed using the checkbox on the left, and click ‘Print Selected’. The action gear on the far left, gives the option to Edit and Delete Case Notes.

9.3 Tier II/III Support Entry

To enter Tier II or III supports for a student, be sure the correct student name appears in the left-hand corner of the Student Dashboard, and select the Tier II/III Support Entry icon in the [2.1.1.4 Student Toolbox](#).

To add a new Tier II/III support, click on the ‘Add New Student Support- Tier II/III’ button on the top right corner of the window.



	School Year	Support Category	Support	Activity	Provider 1	Provider 2	Provider 3	Tier Level	Number of Hours	Support Total	Case Note	Service ID
<input checked="" type="checkbox"/>	10/10/2016	2016/2017 SY	Enrichment/Motivation	Arts/Crafts/Music/Dance					1.00	23.07		1239569

When entering the support, “Total Value of Time” will be automatically calculated based on the “Number of Hours” and “Value per Hour” information. If a donation was part of this support (e.g., food provided by a local restaurant for an event, or donated transportation for a field trip), select the donation checkbox (circled in red in the image below). Additional fields will appear so that “Donation Type” and “Total Value of Donation” can be entered. You also can enter a Case Note at the bottom of the screen, if you want information relevant to this support to appear in the student’s case notes for this date.

Since this form adds a support for only one student at a time, only a “Case Note” can be added—not a “Support Note”. Support Notes can **only** be added in Batch entries, whereas Case Notes can be entered and edited here.

Student Support Entry

School Year * [dropdown] Date * 08/01/2017 [calendar icon]

Support Category * Academic Assistance Support * Literacy Activity [dropdown]

Provider Type * CIS Staff School Where Support Was Provided * CIS Provider School When was this support delivered? [dropdown]

CIS Staff Raja, Aiswariya [search icon]

Provider 2 Type CIS Staff

CIS Staff 2 [search icon]

Provider 3 Type [dropdown]

Amount and Value of Time

Tier of Support * Tier II Individual * or Group Individual

Number of Hours * 2 Value per hour (\$) 23.56 Total Value of Time (auto-calculated) 47.12

of volunteers assisting (if any) 0 Total Volunteer Hours [input]

Add a Donation? Donation Type School supplies Total Value of Donation 0.00

Support Note [text area]

Did a Check-In Occur?

Case Note(s): [Case Note button]

After saving the entry, the preview of the support will be displayed on the summary page. By clicking the action gear to the left of the support, you can Edit or Delete the support.

All Tier I supports and Batch Tier II/III supports will show up here, though Tier I supports cannot be edited. If the Tier II/III support had been entered in Batch, the support note will appear but cannot be edited, whereas the remaining fields can be edited.

Student Support Summary - Tier II/III												Add New Student Support - Tier II/III
Total Rows: 2												
Date	School Year	Support Category	Support	Activity	Provider 1	Provider 2	Provider 3	Tier Level	Number of Hours	Support Total	Case Note	Service ID
		Enrichment/Motivation	Arts/Crafts/Music /Dance						1.00	23.07		1239569
10/10/2016	2016/2017 SY	Academic Assistance	Tutoring	Tutoring Test 4	Test, Nina3			Tier II	2.00	46.14		1239570

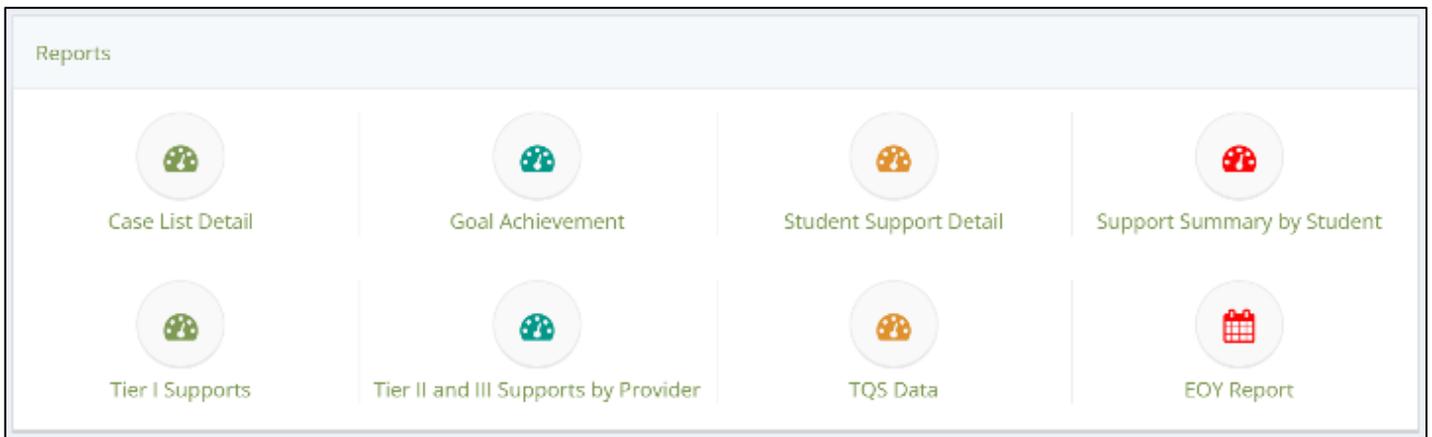
9.3.1 Tiered Support with Check-In

Check-Ins can also be entered as a part of an individual Tier II/III support. This can be done in the Tier II/III Support Entry forms by choosing yes for the question “Did a Check-In Occur?”.

10 Running Reports

10.1 List of Reports on Reporting Dashboard

To access the Reporting Dashboard, click on the wrench (Administration) icon. This will navigate to the dashboard that includes all standard reports and summaries currently available.

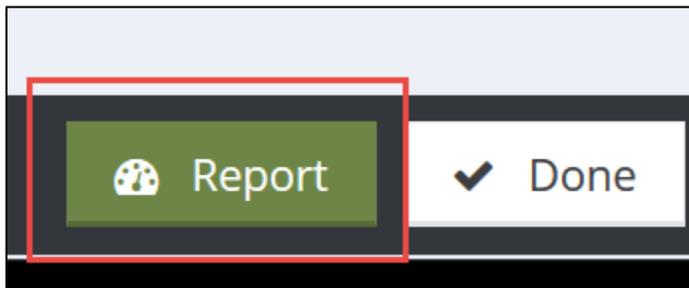


10.2 Setting Report and Summary Parameters/Filters

Many of the report forms will include filters that must be chosen to run the requested report.

Begin Date ★	07/01/2016	End Date ★	03/08/2017
School(s) ★	<input checked="" type="radio"/> All <input type="radio"/> Some	School Year ★	2016/2017 SY
Initiatives	<input checked="" type="radio"/> All <input type="radio"/> Some	Affiliate(s) ★	Communities In Schools National Office
Case Management Intensity Level	<input checked="" type="radio"/> All <input type="radio"/> Some		
Enrollment Status	<input checked="" type="radio"/> All <input type="radio"/> Some		

The date chooser allows you to run reports for a custom date range, but the default is the beginning of the school year (07/01) to the current date (today), or the end of the school year (06/30). In the example above for the Case List Detail report, we have also included filters for the School Year, Affiliate Name, and School(s) to show on the report. Click on the Report button located at the bottom right-hand corner of the dashboard to launch the report.



Note: Filters are required and may be different for other reports as they become available.

10.3 Navigating the Report Viewer

Once the report has been launched, a pop-up window will appear and produce the report itself. Below, the Case List Detail report summary is shown. On some reports, we have intentionally broken up the summary information and graphics and the raw data into two separate areas. Reports will follow similar logic and have a summary show first and then have a link to a sub-report that includes the raw data. Both can be exported directly to Excel which will be explained below.

The summary form or standard report will be the first report displayed. Navigating through an initial report can be done using the navigation arrows found at the top of the report in the browser bar (1) (2). To view the sub-report containing the source data, click on the hyperlink with the report name (3). All reports that feature a sub-report will use this logic. To export the report, use the disk icon (4) and a drop-down list will allow you to export to different formats. For a sub-report, Excel (CSV) is going to be the most common form used by CIS to manipulate this information.

Grade Level	# of Students	% of Students
First Grade	3	20.0%
Third Grade	2	13.3%
Fourth Grade	2	13.3%
Fifth Grade	1	6.7%

Below we can view the sub-report within the Case List Detail report. The browser navigation allows you to return to the parent report (1) and the disk icon (2) to export the sub-report.

1 of 1 Find | Next

Case List Detail

Run By eacevedo - Communities In Schools National Office on 4/6/2017 1:54:58 PM

Report Period..... 7/1/2016 - 4/6/2017
 Affiliate(s)..... Communities In Schools National Office
 School(s)..... Select All



School	Student ID	Student	Case Management Intensity Level	Initiatives	Grade
CIS Provider School	5678915352	Green, Maddy	Moderate		Fifth
CIS Provider School	1523666	Pickles, Tommy	Moderate	B Initiative Test	Sixth
CIS Provider School	12345	Test, Alicia	Moderate		Fourth

Note: If the report features a sub-report, and you would like to download all the information, you will need to access both the summary or initial report and the sub-report and choose to export each, individually, as an Excel spreadsheet.