

CISDM 2.0 Beginning of Year and Quarterly Quick Reference Guide

***Beginning of the Year***

1. Through the **Site Coordinator Dashboard**, click **My Profile** and ensure all of the required information is up-to-date.
2. Complete the school assessment by going to the **Site Coordinator Dashboard,** clicking **School Needs Assessment & Support Planning** button, the **gear icon** to the left of your schools’ name, and then **School Needs Assessment Data** (this is the School Needs Assessment Summary page).
	1. To start the 17-18 school needs assessment, click **New School Needs Assessment Part 1** at the top right corner of your screen and complete part one of the school needs assessment. *The Directors have an Excel spreadsheet to help calculate percentages.*
	2. Once completed, it will take you back to the School Needs Assessment Summary page. Now, click **School Needs Assessment Part 2** and finish the school needs assessment by identifying the needs that CIS will help address.
3. Working from the School Needs Assessment Summary page, once part 2 of the schools needs assessment is completed, click **School Support Plan** to identify school support team members and school-wide goals and metrics, school-wide supports to be provided, describe case management plan, and how progress will be reported to stakeholders. *You will monitor the progress of the goal and metric you select in the plan.*
4. To print your School Support Plan, navigate to the School Needs Assessment Summary page and click **Print Plan**.
5. The process for enrolling students to your school and on to your caseload will depend on whether the student is new or existing. *Unless you know that the student has not been served by CIS,* a*lways first try finding a student to ensure we do not enter student into the system twice.*
	1. Enrolling students served last year – Click **Find Student** and search for the student using the filters at the top of your screen. *You can search using and part of the student’s name (e.g., if you were searching for John Smith, you could enter “S” under Last Name and “J” under First Name and the system will return all students who have a first name starting with the letter “J” and last name starting with the letter “S”).* Once you locate the student, click the row with the student’s name and the student’s information will appear on the Student Dashboard.
		1. Once the student’s name appears at the top left of your screen, click **Student Dashboard** and then **Student Needs Assessment.** Review the information in the Student Demographics page to ensure no student information has changed. Once you complete the Student Enrollment page, the student will be enrolled at your school and on to your caseload. *If you do not have all of the needs assessment information, you can save and close the workflow by clicking the* ***tear drop*** *icon and then clicking the* ***disc*** *icon.*
	2. Adding a new student – Click **Add Student** to open the add student workflow. This workflow will only add the student in CISDM 2.0 and will not enroll at your school or on to your caseload. After indicating you have received parent consent, you will need to do a duplicate check for the student. Like before, you can enter as little or as much information as you want to make the search broad or specific. If no student is returned, click **This is a new student**. Add all required student information by clicking **Next** and **Save** to progress through the workflow.
		1. Once the student is added and his/her name appears at the top left of your screen, click **Student Dashboard** and then **Student Needs Assessment.** Review the information in the Student Demographics page to ensure no student information has changed. Once you complete the Student Enrollment page, the student will be enrolled at your school and on to your caseload. *If you do not have all of the needs assessment information, you can save and close the workflow by clicking the* ***tear drop*** *icon and then clicking the* ***disc*** *icon.*
6. Entering/viewing a Tier I (school-wide) Support – From the Site Coordinator Dashboard, click **Tier I Support Entry**. From the Tier I Support - Summary page, you can add, view, or edit tier I supports. To add a tier I support, click **Add New Tier I Support** at the top right of your screen. Complete the required information and be sure to enter what occurred in the notes section. If case managed students participated, you can note that they participated at the bottom of the screen where students who are enrolled to your school will populate if you select that case managed students attended.
7. Entering/viewing a Tier II/III (group/individual) Support – From the Student Dashboard, click **Tier II/III Support Entry**. From the Student Support Summary page, you can add, view, or edit tier II/III supports. To add a tier II/III support, click **Add New Tier Student Support – Tier II/III** at the top right of your screen. Complete the required information and enter any pertinent information by clicking the **case notes** button. If a check-in occurred, use check the box *Did a check-in occur.*
8. Documenting a check-in individually – From the Student Dashboard, click **Check-in** and then click the **+ Add New Check-in Entry** button at the top right of your screen. Complete the required information and click save.

***Every Grading Period***

1. Monitoring and adjusting student progress – From the Student Dashboard, click the **Progress Monitoring and Goal Achievement** button. Once in Progress Monitoring, click the gear icon beside each goal/metric that you selected in the student support plan, and then click **Progress Monitoring.** For the first grading period, a box will already appear, for the 2nd, 3rd, and 4th (final) grading period, it may be necessary to click **+ Add Row.** Complete the required information and click save.
2. Documenting report outs to school support team, affiliate leadership, and school leadership – From the Site Coordinator Dashboard, click **Site Coordination Entry**. Click **+ Add New SC Entry** at the top right of your screen. Fill out the required information and under the *Type of Site Coordination* dropdown, select which reporting you completed. Keep in mind, you must document all three types of report outs every grading period (Reporting – Affiliate, Reporting – School Leadership, Reporting – School Support Team).