1. User Experience
   1. Tear drop icon – Depending on the page that you are on, different icons will appear when you click the tear drop icon. Using the tear drop icon, you can easily export to Excel, save and exit workflows, pin pages, and print dashboards.
   2. Back button vs. bread crumbs – **Do not use the back button in your browser or it will take you out of CISDM 2.0 to the last website you visited and all work will be lost!** You can navigate to previous pages by using the bread crumb (…) feature at the top of your screen under the three horizontal lines.
   3. Zoom – Depending on resolution of your browser and screen, it may be necessary to zoom in or out to see all fields in a form. If fields are overlapping, try zooming out in your web browser.
2. Site Coordinator Dashboard
   1. Site Coordinator Toolbox
      1. My Profile – Edit information about yourself, experience, and work with CIS.
      2. Change Password – Change the password associated with your CISDM 2.0 account.
      3. My Caseload – When students are assigned to a case manager on the enrollment page in the student needs assessment, they are added to that person’s caseload. Through ‘My Caseload’, you can view all students assigned to you and click their first name instead of finding them every time you want to complete a needs assessment, support plan, track metrics and goals, or enter supports, check-in information, or case notes.
   2. School Activities
      1. School Needs Assessment & Support Planning – You will complete your school needs assessment and support plan by clicking this button and clicking the gear icon beside the name of your school. To start your needs assessment, click ‘New School Needs Assessment Part 1’ at the top right of the screen.
      2. Tier I Support Entry – Enter all Tier I supports aligned to your school support plan here (you can still mark case managed students as attending).
      3. Batch Entry of Tier II/III Supports – Batch entry is helpful when entering a support that was provided to a case managed group of students to address a common need. Batch entry should only be used when students receive a similar support in the same sitting.
      4. Site Coordination Entry – In addition to documenting your quarterly report outs to school leadership, affiliate leadership, and the school support team, you can document time spent planning supports and managing community partners, among other things.
      5. Basic Needs/Resources Entry – All school-wide supports providing basic needs/resources will be entered in the Basic Needs/Resources Entry.
3. Student Dashboard **(applies to the student whose name appears in the top left corner of the screen)**
   1. Assessment, Planning & Monitoring
      1. Student Needs Assessment – As part of the student needs assessment, you will review the student’s demographic/contact information, enroll them to a school and assign a case manager, enter attributes, risks, assets, and ABC baseline data, and determine case management intensity.
      2. Goal Setting and Support Planning – Once you’ve completed the student needs assessment, you will click the green button with an open box under ‘Goal Setting and Support Planning’ to complete the student support plan. You can also edit ABC baseline and ABC target (goal) metrics (by clicking the gear widget) and planned supports on this page (button under ‘View Planned Supports’). The coolest part: you can print the student support plan by clicking the gear widget and clicking ‘Print Support Plan’.
      3. Progress Monitoring and Goal Achievement – Every grading period, you should enter and track goal-related metrics and reviewing progress. Once here, click the gear icon next to the metric related to the student’s goal (these were selected in the student support plan), and click ‘Progress Monitoring’. At the end of the year or when the student exits your caseload, you will determine ‘Final Goal Achievement’ by comparing the student’s progress towards the target that was set.
      4. Baseline and Goal History – You can view, but not edit, metric data entered in previous years. Taking historical data into consideration may be helpful when setting goals/targets.
      5. Non-Goal Metric Data Tracking – In the student support plan, you are able to enter non-ABC goals. All selected non-ABC goals will be tracked on this page.
   2. Student Toolbox
      1. Tier II/III Support Entry – This is where you will enter a Tier II/III support delivered to an individual student. You can acknowledge that a required (monthly) check-in occurred under the checkbox ‘Did a check-in occur?’ This will save you a lot of time from not having to enter them separately if you delivered a support at the same time you checked in with the student.
      2. Check-in – If the check-in does not occur as part of a support, you will enter it individually here. For example, many CIS students are served by partners or volunteers. In this case, site staff should check-in and document monthly check-ins, even if they did not directly deliver a support.
      3. Student Case Notes – All case notes entered throughout CISDM 2.0 will end up here. You can add a new one, edit/delete a case note, and print case notes.
      4. Case Manager Assignment – At times it is necessary to change case manager or add the student to another staff members caseload. This would allow the student to be moved to another’s caseload or appear on two separate caseloads, when necessary.
      5. Student Contacts – You can edit student contact information entered in the student intake/needs assessment.
      6. Parent/Guardian Consent – You can edit a student’s parent consent information entered in the student needs assessment or upload the signed parent consent.
      7. Student Referrals – You can edit referral information entered in the student needs assessment.
      8. Student Enrollment/Exit/EOY Status – At the end of the year or if the student exits the caseload for another reason (drops out, moves, etc.), you will exit the student from their enrollment and your caseload. It is necessary to indicate the student’s EOY and Closeout Status.
   3. Supports (5 most recent) – Click in the table to pull up all Tier II/III supports for the student.
   4. Case Notes (5 most recent) – Click in the table to pull up all case notes for the student.
4. Edit Student Needs Assessment – Allows you to edit the following components of the student needs assessment
   1. Demographics/Contact Info
   2. Risk Factors
   3. Assets
   4. Attributes