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| CISDM 2.0 Cheat Sheet |
| Activity  | **Instructions** | **Helpful** **Hints** |
| Saving and exiting a workflow | Tear drop button > Save Progress and Close | Remember to open this existing workflow when going back into a needs assessment or support plan rather than opening a new workflow* Ex: Click the student needs assessment button – list of open workflows appears – click the workflow for your student
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| School Needs Assessment/Support Plan | Site Coordinator Dashboard > School Needs Assessment & Support Planning > Gear Widget > School Needs Assessment Data | Remember, any time you need to exit a workflow before it is complete, use the tear drop button > save progress and close.  |
| Documenting Site Coordination Activity | Site Coordinator Dashboard > Site Coordination Entry > +Add New SC Entry (top right) > Save | Use this section to document reports to affiliate/school leadership/support team, school progress monitoring and adjusting the school support plan, etc. |
| Entering a Tier 1 Support | Site Coordinator Dashboard > Tier 1 Support Entry > Add New Tier 1 Support (top right) > Save | Keep in mind that a Tier 1 intervention should only be entered *once*. If it is an ongoing intervention (e.g., a weekly breakfast), you should *edit* the Tier 1 Support you already entered and change the hours for the intervention instead of entering the intervention as a new Tier 1 Support |
| Edit Tier 1 Support | Site Coordinator Dashboard > Tier 1 Support Entry > Enter school where support was provided > Find support & click Gear Widget > Edit |  |
| Locating a student’s profile to enroll or enter data. | Student Dashboard > Find Student > Search for Student > Select Student  | When starting with a new student, remember to always use the Find Student feature to avoid enrolling duplicate students. |
| Adding a Student after Searching (unsuccessfully) through “Find Student” | Student Dashboard > Add Student  |  |
| Enrolling a student and assigning case manager (done through student’s needs assessment) | With correct student at the top left of your screen > Student Needs Assessment > Review student demographic data > Complete enrollment page > Finish workflow or save and exit workflow  | Student will not appear on your caseload & you will not be able to add supports for the student until you complete and save the enrollment page |
| Viewing Caseload & Selecting Student | Site Coordinator Dashboard > My Caseload |  |
| Student Needs Assessment | Student Dashboard > Student Needs Assessment  | It is best to work through the entire workflow in one sitting rather than exiting. If you have to exit, use the teardrop icon > save progress and close. Remember to re-open this workflow when you return rather than starting a new workflow. |
| Student Support Plan | Student Dashboard > Assessment, Planning & Monitoring > Goal Setting and Support Planning > + New Workflow |  |
| Add Case Note | Student Dashboard > Student Case Notes > Add New  | You can also add a Case Note with a specific support. Click the red Case Note button at the bottom of the tier 2/3 support entry screen to add a note to any support. |
| Edit Case Note  | Student Dashboard > Student Case Notes > Gear Widget > Edit |  |
| Editing Baselines and Target Metrics | Student Dashboard > Goal Setting and Support Planning > Gear Widget > Edit Baseline/Target Metrics > Save |  |
| Entering tier 2/3 supports in batch | Site Coordinator Dashboard > Batch Entry of Tier II/III Support (ensure Case Manager is selected) > Search for Students > Select students who participated > Save | Once you save a batch entry, you cannot edit the support in batch. To edit the support, go to each participating student’s dashboard and edit the support individually for each student. |
| Entering a tier 2/3 support for an individual student | Student Dashboard > Tier II/III Support Entry > Add New Student Support – Tier II/III > Save | To edit: Student dashboard > Tier II/III Support Entry > Gear widget > Edit > Save |
| Documenting check-in as part of support | Student Dashboard > Tier II/III Support Entry > Add a New Student Support > Check “Did a Check-in Occur?” > Select Categories that Apply > (Optional: Enter Case Note) > Save |  |
| Documenting check-in not performed with a support | Student Dashboard > Check-In > + Add New Check-in Entry |  |
| Entering Student Metric(s) Aligned to Identified Goal(s) | Student Dashboard > Progress Monitoring & Goal Achievement > Gear Widget beside metric > Progress Monitoring | Note: progress monitoring and adjusting (if needed) should occur at least once per quarter |
| Changing Case Manager | Student Dashboard > CM Assignment > Gear Widget > Edit > Select new Case Manager |  |
| To export lists to Excel (caseload, case notes, supports) | On the page you want to export, click the tear drop button > Excel Export |  |
| Completing Needs Assessment when the “Family is already enrolled” error appears | Student Dashboard > Edit Needs Assessment > Demographics > Enter information on each page and save > Student Dashboard > Edit Needs Assessment > Repeat steps for Risk Factors/Assets/Attributes > Student Dashboard > Enrollment/Exit/EOY Status > Gear widget > Edit CM intensity level > Enter info > Save > Student Dashboard > Goal Setting/Support planning > Gear widget > Edit attendance/behavior/academics baselines > Save | Note: If you “save progress and close” when leaving a needs assessment rather than just closing the window *or* complete the needs assessment in one sitting, this error should not appear and these steps won’t be necessary. |

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| CISDM Icons Cheat Sheet |
| Icon | **Name** | **Function** |
|  | Administration Dashboard | View info related to assigned schools or students; Run reports/summaries for school/caseload |
|  | Case Management | View and enter info related to schools/students – site coordinator and student dashboards and support entry forms found here |
|  | Gear Widget | Contains various functions throughout system – click here whenever you want to “Edit” or “Delete” an item |
|  | “Breadcrumbs”(i.e., Back Button) | Navigate back to previously visited pages |
|  | “Teardrop Icon”  | Contains different functions throughout system – all following icons found under teardrop |
| Icons Located Under Teardrop Icon |
|  | Excel Export | Download table into an Excel file |
|  | Pin Page | Saves a page as a “favorite” |
|  | Print | Print the current form or dashboard |
|  | Save Progress and Close | Save workflow and all data that has been entered so far. Allows you to come back and pick up where you left off |