



# CISDM User Guides

## **Administrative Tasks**

[First Time Login](#)

[Changing Password and Email](#)

## **School Data**

[School Support Plan](#)

[School Progress and Goal Achievement](#)

[Tier I Supports](#)

## **Student Data**

[New Student Profile](#)

[Student Support Plan](#)

[Student Monitoring Page](#)

[Tier II and III Supports](#)

[Student Progress and Case Notes](#)

[Student Goal Achievement](#)

[Student EOY Closeout Status](#)

[Updating Case List for New School Year](#)



## CISDM Training Series: Logging into CISDM for the First Time

In your internet browser, go to the website [www.cisdms.net](http://www.cisdms.net).

Click on *Forgot Your User ID or Password?*.

**Enter your User ID and Password and click the 'Logon' button.**

User ID:

Password:  [Forgot Your User ID or Password?](#)

In the *User ID* field, enter the username that your supervisor or affiliate staff provided to you. Click *Submit*.

### **Forgot Your Password?**

To receive a temporary password, enter your User ID, then click "Submit." An email with the password will be sent to the email address associated with your profile. You will use this temporary password to login and create a permanent password.

User ID:

If your request was successful, you should receive the following message:

**Temporary password sent to your account; use this password to login and reset your password.**

[Click Here to return to the Login Page.](#)

You should receive an email with the subject "Requested Password Information" in your inbox at the email address that was set up for your account in CISDM. The content of the email will include a



## CISDM Training Series: Changing Your Password and Email Address

Click on *My Account* in the gold menu bar.



To change your password, click on *Change Password*. Enter your current password, then choose a new one and enter it the same way in both the *Password* and *Confirm Password* fields. Click *Save*.

Please make note of your new password that you enter, otherwise you will need to reset it again to login.

### PASSWORD EDIT

#### Password Requirements:

- Must be between 6 and 20 characters in length
- Must contain at least 1 numerical character(s) but no more than 20 numerical character(s)
- Must contain at least 1 alpha character(s) but no more than 20 alpha character(s)
- CANNOT contain any spaces

Current Password:

Password:

Confirm Password:

[Save](#) [Cancel](#) [Reset](#)

To change your email address or other contact information, click on *Edit Account*. Make any needed changes and click *Save*.

### My Account

	<a href="#">Edit Account</a>
Username ✓	sleelers
Password	***** <a href="#">Change Password</a>
First Name ✓	Bradshaw
Middle Initial	Q
Last Name ✓	McNabb
Title	Executive Director



## CISDM Training Series: Creating a School Support Plan

In the School Mgmt menu, navigate to *School Support Plan*.

Click on the *Create School Support Plan* button. You can also edit existing plans here (the button will read *Edit School Support Plan*).

Check off the items that are relevant to your school under the Risk Factors section. This information will come from the needs assessment you conducted.

Assign the school-wide goals that you plan to work on this year. Regardless of the goals chosen, Average Daily Attendance OR Chronic Absenteeism, Suspension, Standardized Test Proficiency OR End of Course Testing, and Graduation and Dropout Rates are required to be tracked for each CIS model school. *Note: If your affiliate/state office is tracking additional metrics, these will also appear in the School Support Plan and can be assigned to schools as needed.*

Document the support categories that you plan to provide/broker. Click *Save*.

Under the word *Metrics* on the left side of the screen, you will see the list of metrics that you chose to track for your school.

A screenshot of the "2015 School Support Plan" web interface. On the left is a navigation menu with a search bar and a list of menu items. The item "College Readiness - School Graduation and Dropout Rates" is circled in red. The main content area is titled "2015 School Support Plan" and includes a "Select Year" dropdown set to "15-16 SY". Below this are two buttons: "Edit School Support Plan" and "Delete School Support Plan". The main content is organized into sections: "School Wide Risk Factors" (with a text input field containing "Ambiguous/lax/inconsistent rules and sanctions, High crime rate/victimization rate"), "Planned Goals" (with a text input field containing "Improve/Maintain Academics, Improve/Maintain College/Career Readiness"), "Planned Tier I Supports" (with a text input field containing "Academic Assistance, Basic Needs/Resources, Behavior Interventions/Modification, College/Career Preparation, Life/Social Skills"), and "Targeted Metrics" (with a text input field containing "College\_Readiness\_-\_School, Graduation\_and\_Dropout\_Rates, Standardized\_Test\_Proficiency\_-\_School").



## CISDM Training Series: Documenting School Progress and School Goal Achievement

In the School Mgmt menu, navigate to *School Progress*.

Click on the *Document School Progress* button. In order to document progress toward goals, you have to have created a School Support Plan.

From the dropdown menus, choose the report period, report date, and whether you have provided Tier I Supports to address each goal so far this school year. You can also add comments to provide context to your responses. Click *Save*.

**School Progress For 15-16 SY**

Report Date	Oct ▼   20 ▼   2015 ▼
Report Period	1st Grading Period ▼
<b>School Goal</b>	<b>Progress Reported</b>
Improve/Maintain Academics	Provided related Tier I supports ▼
Comment:	<input type="text"/>
Improve/Maintain School Climate	Provided related Tier I supports ▼
Comment:	<input type="text"/>
Improve/Maintain Parent Engagement	Did not provide related Tier I supports ▼
Comment:	<input type="text"/>

**Save** **Cancel** **Reset**

At the end of the school year, navigate to *School Goal Achievement* under the School Mgmt menu.

Click *Edit* in blue font.



## CISDM Training Series: Entering Tier I Supports

In the School Mgmt menu, navigate to *Tier I Supports*.

Click on the *Add* button.

Enter the applicable information for this Tier I Support. Be sure to choose the correct school year, report period (month) and dates; the default values will reflect the date that you are entering the information. Student Support Category and Provider Type are required. If you are using the Donation type and value fields (e.g., for Basic Needs/Resources), you might enter zero (0) hours. If you are entering a Site Coordination-related support, you might enter zero (0) for the number of students directly served.

**Tier I Support Entry**

Report Period	August	Year	15-16 SY
Start Date	Aug. 6 2015	End Date	Aug. 6 2015
Provider Type	Community Partner		
Provider Name	Target Stores		
Student Support Category	Physical Fitness/Health		
Student Support Name	Family Fitness Night		
# Students Served	120	# Parents/Guardians Served	45
<input checked="" type="checkbox"/> Check here to record Student Level Attendance			
# of others served	0	Hours	2.5
Value per hour	\$23.00	Value of Time	57.50
Donation Type		Donation Value	0.00
Notes (1500 char max)			

**Save** **Cancel** **Reset**



## CISDM Training Series: Creating a New Student

In the Student Mgmt menu, navigate to *Case List*.

*Note: If the Grade Level is in red font, he or she does not have a current grade level for this school year. A student must have a current grade level for a particular year in order to appear on that year's reports. If a student's name is in red font, he or she does not have a Student Support Plan for this school year.*

Click on the *Add Student* button.

**Case List**

View : <b>A</b> <b>B</b> <b>C</b> <b>D</b> <b>E</b> <b>F</b> <b>G</b> <b>H</b> <b>I</b> <b>J</b> <b>K</b> <b>L</b> <b>M</b> <b>N</b> <b>O</b> <b>P</b> <b>Q</b> <b>R</b> <b>S</b> <b>T</b> <b>U</b> <b>V</b> <b>W</b> <b>X</b> <b>Y</b> <b>Z</b>				
<b>Add New Student</b>		<b>View Inactive Students</b>		
Select Case Manager	All	<b>Find Student</b>		
Student ID	Student Name	Home School	Grade Level	Action
12356	Bob, Robert	Ben Franklin	Pre_K	Select Inactivate
1234666	Clemons, Anthony	Ben Franklin	2nd Grade	Select Inactivate
CIS-122594	Cooper, Fiddle	Ben Franklin	12th Grade	Select Inactivate
CIS-122591	Cooper, Maddie	Ben Franklin	11th Grade	Select Inactivate

Complete the information in the Student Profile (items with a blue checkmark are required).

*Note: You must have parent consent for each case managed student that you enter into CISDM. Otherwise, you will be unable to track additional information such as student supports and metrics. If you navigate to other parts of the system for this student, you will be redirected to the Student Profile.*



## CISDM Training Series: Creating a Student Support Plan for an Existing Student

In the Student Mgmt menu, navigate to *Student Support Plan*.

From the Case List, choose the student record you want to work with.

Click on the *Create Student Support Plan* button. You can also edit existing plans here (the button will read *Edit Student Support Plan*).

**Current Student**

Name: Robert Bob	Student ID: 12356	Grade Level: 7th Grade (2015)	<a href="#">Case List</a>	<a href="#">Next</a>	<a href="#">Prev.</a>
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**2015 Student Support Plan**

Select Year 15-16 SY ▼

Create Student Support Plan

Check off the items that are relevant to your student under Student Attributes, Risk Factors, and Developmental Assets. This information will come from the needs assessment you conducted.

**Document Student Attributes**

Student Information (check all that apply)	
<input type="checkbox"/> Adjudicated youth	<input type="checkbox"/> Child of active duty military
<input type="checkbox"/> Credit recovery/retrieval	<input type="checkbox"/> Eligible for Free/Reduced Priced Lunch (FRPL)
<input type="checkbox"/> English Language Learner/Limited Eng. Proficient	<input type="checkbox"/> Foster care/Group home

Assign the goals that you and your student plan to work on this year. For each goal, choose at least one metric to track in order to measure progress throughout the year. For each metric, enter a target value that the student will try to reach.





## CISDM Training Series: The Student Monitoring Page

In the Student Mgmt menu, navigate to *Case List*. Choose the student you want to work with and click on *Student Monitoring Page* on the left side of the screen.

Click on the *New Intake Record* button.

**Current Student**

Name: Robert Bob	Student #: 12356	Grade Level: 7th Grade (2015)	<a href="#">Case List</a>
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Archive Information

15-16 SY Record ▾ New 2015 Intake Record

Enter the date of your needs assessment of this student. *Note: The school year should default to the current year.*

Enter the Personalized Goals that you and your student will work on this year (these are outside of the standard list of goals found in the Student Support Plan). Click *Save*.

Enter your Parent Engagement Strategy for this student. Click *Save*.

**Student Monitoring Page**

<a href="#">Edit Intake Record</a>
Needs Assessment Date: 8/10/2015      School Year: 15-16 SY

**Personalized Goals**

<a href="#">Add Goal</a>
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**Family Engagement Strategy**

<a href="#">Add Strategy</a>
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Choose the metric you want to document and click on *Add Entry*. *Note: Each grading period, you can enter the student's data on this page for the metrics you are tracking.*



## CISDM Training Series: Entering Tier II and Tier III Supports

In the Student Mgmt menu, navigate to *Tier II and III Supports*.

From the Case List, choose the student record you want to work with.

Click on the *Add* button.

A screenshot of a web application interface. At the top, there is a blue header bar with the text "Select Report Period/Report Year". Below this, there is a dropdown menu showing "August - 15-16 SY" and the text "2015 REPORT YEAR". To the right of the header bar is a yellow "Add" button, which is circled in red. Below the header bar is a section titled "Tier II & III Supports for August". This section contains a form with the following fields: "Begin Date: 8/10/2015", "End Date: 8/10/2015", "Hours: 2", and "Value of \$46.14". Below these fields are several rows of information: "Staff: Edee Georgia", "School: Ben Franklin", "Provider Type: Community Partner", "Provider Name: Childrens BFF", "Student Support Category: Life/Social Skills", "Student Support Name: Mentoring", "Donation Type:", and "Donation Value: \$0.00". At the bottom of the form, there is a "Notes:" field and two yellow buttons labeled "Edit" and "Delete".

Enter the applicable information for this Tier II or III Support. Be sure to choose the correct school year, report period (month) and dates; the default values will reflect the date that you are entering the information. Student Support Category, Provider Type, and the Tier II or III designation are required. If you are using the Donation type and value fields (e.g., for Basic Needs/Resources), you might enter zero (0) hours.



## CISDM Training Series: Documenting Student Progress and Case Notes

In the Student Mgmt menu, navigate to *Student Progress*.

From the Case List, choose the student record you want to work with.

Click on the *New Progress toward Goals* button. In order to document progress toward goals, you have to have created a Student Support Plan.

The screenshot shows a header bar with the following information: Name: Robert Bob, Student ID: 12356, Grade Level: 7th Grade (2015). There are links for Case List, Next, and Prev. Below this is a 'Select Year' dropdown menu set to '15-16 SY'. Two buttons are visible: 'New Progress toward Goals' (circled in red) and 'General Case Notes'.

Choose the report period, report date, and progress option from the dropdown menus. You can also add comments to provide context to your choice. Click *Save*.

The screenshot shows a form for documenting progress. At the top, there are dropdown menus for 'Report Period' (set to '1st Grading Period') and 'Report Date' (set to 'Oct. 25 2015'). Below this is a section titled 'Progress for 15-16 SY' containing a table with three columns: 'Student Goal', 'Progress Reported', and 'Comment'. The table has two rows of data. At the bottom of the form are three buttons: 'Save', 'Cancel', and 'Reset'.

Student Goal	Progress Reported	Comment
Improve/Maintain School Behavior	Progressing	Only got suspended twice this grading period.
Reduce High Risk Behavior	No Progress - Negative	Hasn't changed his risky behavior outside of school.

To enter case notes for your student, choose the *General Case Notes* button on the initial Student Progress screen.



## CISDM Training Series: Documenting Student Goal Achievement

In the Student Mgmt menu, navigate to *Student Goal Achievement*.

From the Case List, choose the student record you want to work with.  
Click on the *Document Goal Achievement* button.

**Student Goal Achievement**

**Document Goal Achievement**

**Document Basic Needs**

Student Basic Needs	Status	Date Reported
Clothing	N/A	8/19/2015
Food	N/A	8/19/2015
Shelter	N/A	8/19/2015
Medical resources	N/A	8/19/2015

Choose the report period and report date from the dropdown menus. The report periods are included for the instances in which you want to document that a student met his or her goal earlier in the school year. Otherwise, you will choose a report period of Final to show that goal achievement occurred by the end of the year. For each goal, choose one of three options to represent the student's result. After each goal, you will have to click *Document Goal Achievement* again to add another entry.

Report Period  Report Date

Student Goal

Goal Achievement

Met Goal  
 Not Met-Progress  
 Not Met-No Progress



## CISDM Training Series: Documenting Student EOY/Closeout Status

In the Student Mgmt menu, navigate to *Student EOY/Closeout Status*.

From the Case List, choose the student record you want to work with.

Click on the *Document EOY Status* button.

There are two required dropdown menu fields that you will complete: *EOY Status* and *Closeout Status*. There will also be three optional fields that you will complete for graduating seniors, if you have the information: *Postsecondary Plans*, *College Attending*, and *Alumni Contact Information* (email address and phone number).

Name: Robert Bob	Student ID: 12356	Grade Level: 7th Grade (2015)	Case List	Next	Prev.
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**Save** **Cancel** **Reset**

**Student EOY Status for 15-16 SY**

EOY Status ✓	Graduated
Closeout Status ✓	Select a Closeout Status
Post Secondary Plans	Military
College Attending (if known)	

**Save** **Cancel** **Reset**



## CISDM Training Series: Updating Your Case List for the New School Year

In the School Mgmt menu, navigate to *Case List Maintenance*.

There are a number of functions that you can perform in batch through Case List Maintenance, but at the beginning of a new school year, one of the first tasks you will want to complete will be to update last year's case list through *Grade Level Promotion* (for students who are on your case load again this year and have moved up to the next grade), *Grade Level Retention* (for students who are on your case load again this year but were retained in their grade), and *Student Inactivation* (for students who are not going to be on your case load again this year). All of your previous students should fall into one of these three groups.

Case List Maintenance	
Please select what data you would like to batch enter	
Data	Action
Grade Level Promotion	Select
Grade Level Retention	Select
Student Inactivation	Select

### Grade Level Promotion

If any of your students are moving to a new CIS school, perhaps because they have gone from 8<sup>th</sup> grade at the middle school to 9<sup>th</sup> grade at the high school, you can choose the new school's name from the dropdown menu. Make sure you choose last school year from the next dropdown menu. The other three menus are optional and allow you to filter for specific students. Highlight the students who were promoted, click *Add to List*, then click *Save*. CISDM will automatically add one grade level to those students' record (e.g., a student in 8<sup>th</sup> grade for the 14-15 SY will now be in 9<sup>th</sup> grade for the 15-16 SY). If the students' grade levels were in red font on the Case List, they will now be black.