ISAM Application User Guide

Introduction

The Texas Education Agency uses an application called the *Intervention, Stage, and Activity Manager* (ISAM) to manage required intervention activities for schools identified in state and/or federal accountability systems, dropout prevention, results driven accountability, and data validation.

The ISAM application allows users to submit required documentation to the agency as well track feedback from and communication with the TEA specialist assigned to your campus or district.

This user guide provides general instructions for using the ISAM application; however, if you have questions or concerns not addressed in the guide contact the ISAM System Administrator at ISAM@tea.texas.gov.

Requesting an Account

If you do not have a TEAL account, complete the following steps to gain access to ISAM:

1. Click the link: https://tealprod.tea.state.tx.us/
2. From the TEAL login page select *Request New User Account* then choose *Intervention Stage and Activity Manager* from the table.
3. Enter your contact information and organization number in the fields provided, then when prompted choose either *District/Charter User* or *Campus User* as your role.
    - The *District/Charter User* role should be chosen by personnel who are responsible for multiple program areas or are responsible for intervention and submission activities for multiple campuses within the district.
    - The *Campus User* role should be chosen by personnel who are responsible for intervention and submission activities for one campus.
4. Click *Done* and then *Save Changes.*

If you already have a TEAL account but not the ISAM application, complete the following steps:

1. Log in to your TEAL account https://tealprod.tea.state.tx.us/
2. Select *My Application Accounts* under the *Self-Service* heading.
3. Click the *Request New Account* button then follow the same instructions listed in step 3 of the section above.

Logging In

Once you can access the ISAM application, you will login in using TEAL https://tealprod.tea.state.tx.us/.

1. Enter your username and password on the login page.
2. If your list of TEAL applications is not already visible, select the *Access Applications* link under the *Self-Service* heading to reveal your applications list.
3. Next, click the link that lists your ISAM role, e.g., *District/Charter User un*der the *Intervention, Stage, and Activity Manager* heading on TEAL menu.
4. This will take you to the ISAM homepage for your district or campus.

ISAM Application User Guide

Common Actions

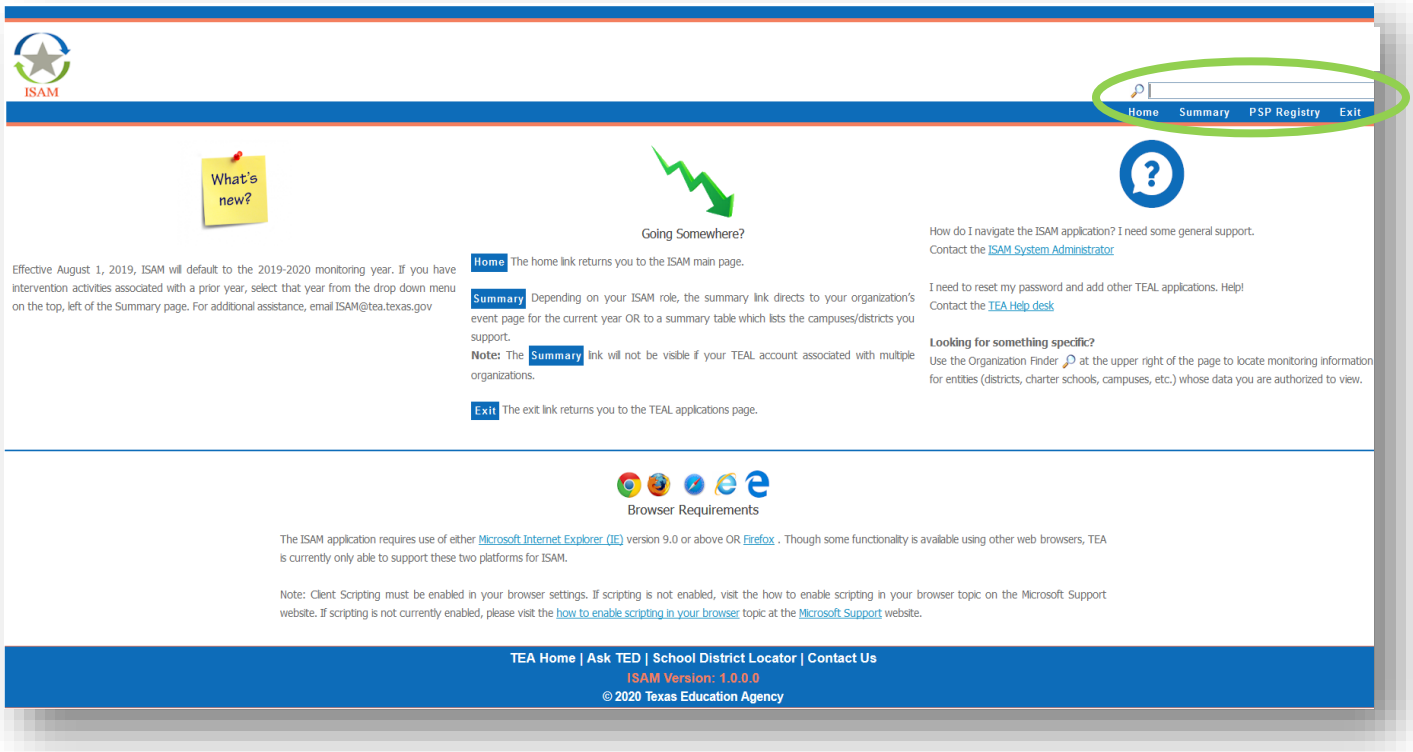
There are several actions you might complete in ISAM; the next sections describe how to complete the most common actions taken by users of the ISAM application.

I. Creating a contact profile
II. Assigning contact to a program review
III. Submitting required documentation
IV. Accessing feedback/follow up information

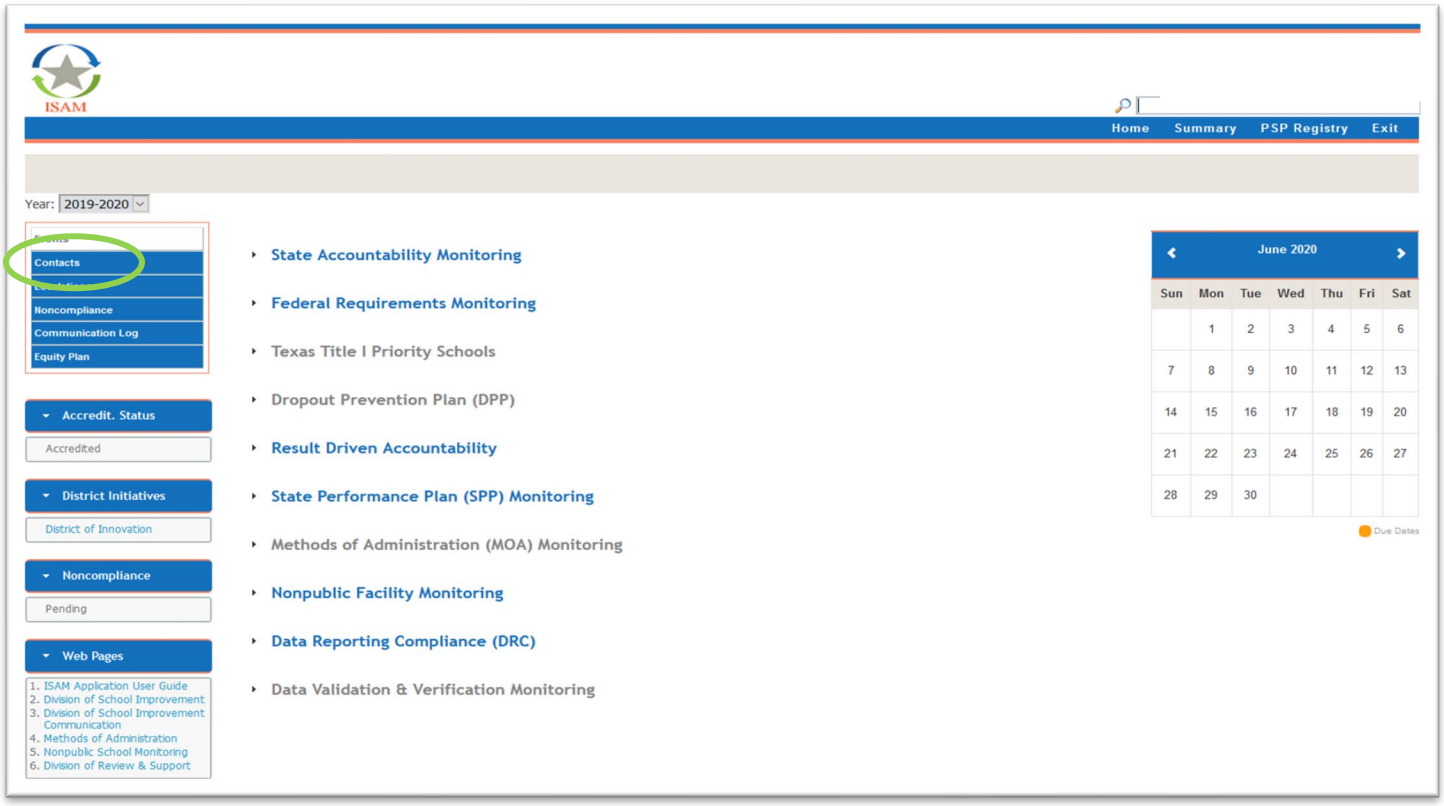
I. Creating a Contact Profile

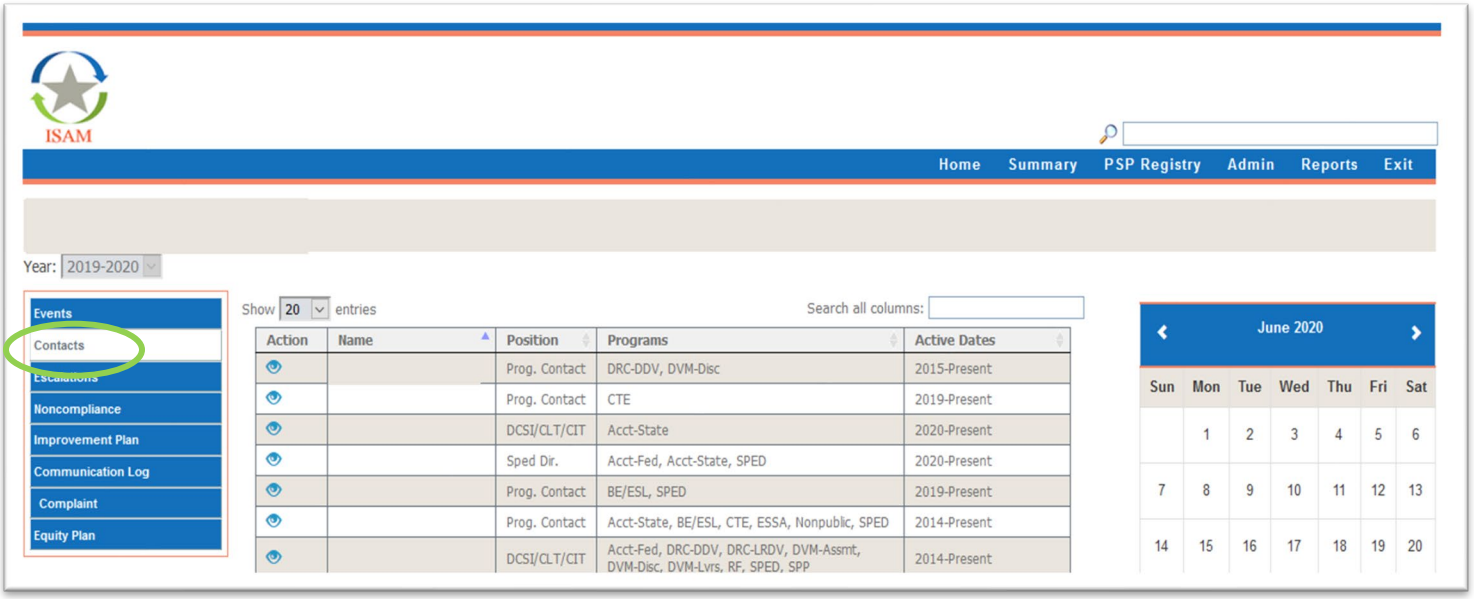
Follow the steps below to create an ISAM contact profile for an individual who is new to the campus/district.

1. Navigate to the campus/district event summary page in one of two ways:
   a) Clicking on the summary link at the top of the application home page, or
   b) Type the name of the campus or the county-district campus number (CDCN) into the search bar at the top of the application home page. Once the campus/district name is visible, click on the name of the campus/district to be directed to the Event Summary page.



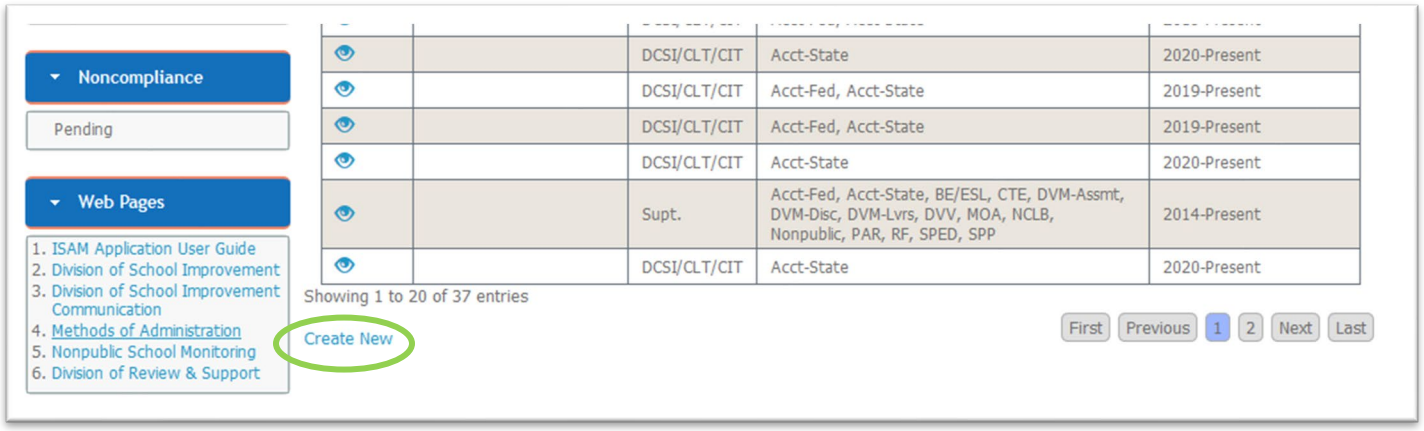
2. Select “Contacts” from the left-hand navigation bar. This will bring up the Contacts table, which is a list of every individual with an ISAM profile in the district regardless of title or program assignment.

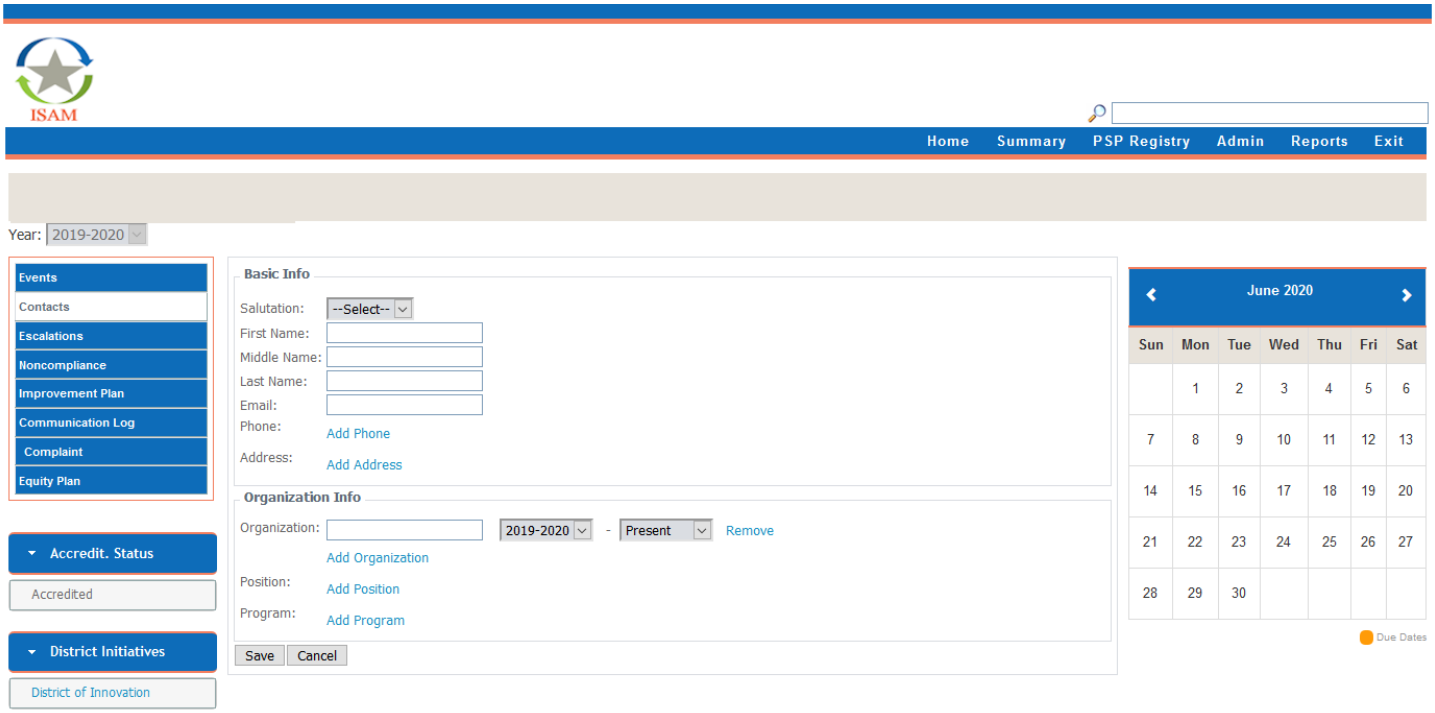




NOTE: A user may have multiple roles and/or positions within the district but only **one profile per person** may be created Contacts table. If multiple profiles are listed for the same individual follow the instructions in the Section III to update their profile.

3. Click “Create New” at the bottom of the table to display the fillable “Contact Profile” screen. Follow the steps below to enter the new contact’s information:
   a) Basic Info: Enter the contact’s information including salutation, full name, email, phone number(s), and address.
   b) Organization Info:
      i) Click “Add Organization” and enter the name or CDCN for each campus the individual works on or will work with.
      ii) Click “Add Position” and select the title of the individual.
      iii) Click “Add Program” and select all programs the individual works with.
4. Click “Save”. Repeat Step 3 to create a profile for each person that is new to the campus or district.





NOTE: Be sure the dates of service run from the year the individual was assigned to the organization, position, or program through “Present”. If you see an individual whose role within the district/campus has changed follow the instructions in the Section III to update their profile.

II. Assigning a Contact to a Program Review

Follow the steps below to assign an individual to a specific program review.

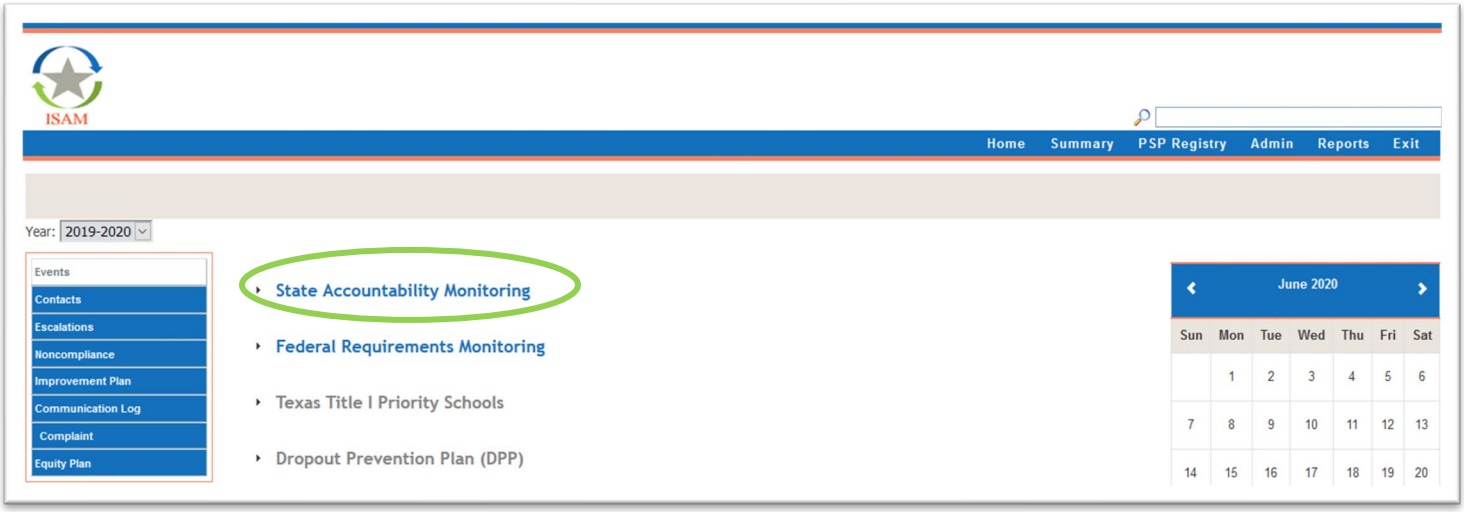
NOTE: Individuals listed in ISAM as a review contact will periodically receive automated emails from the system regarding the status of the review(s) they are assigned to.

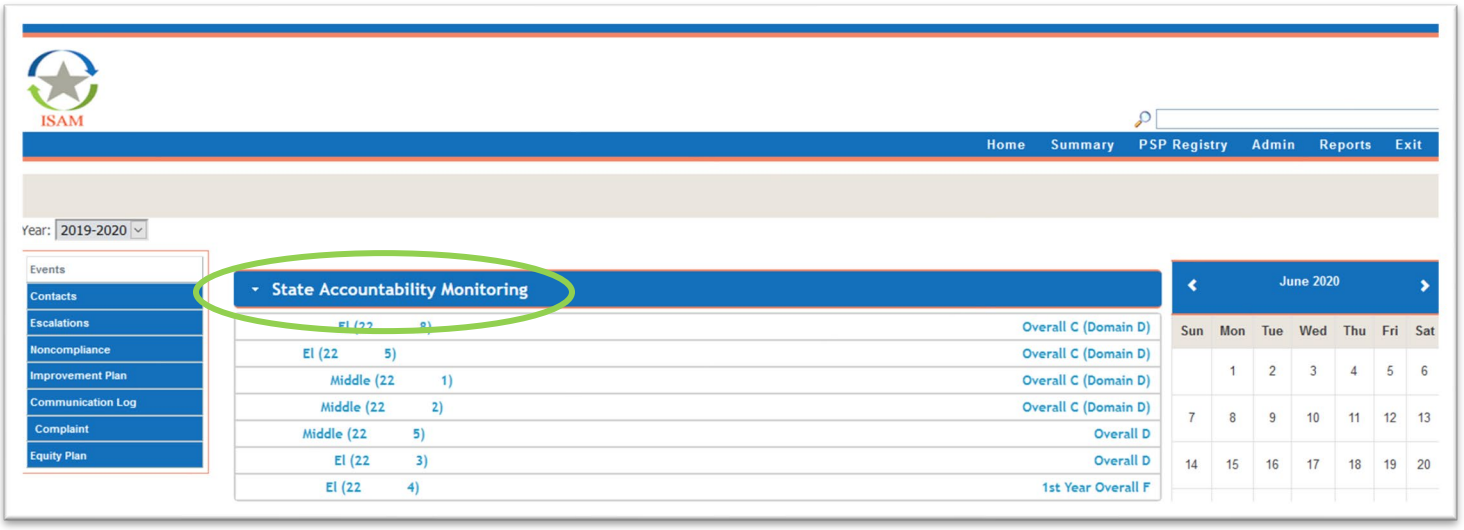
1. Navigate to the campus/district event summary page in one of two ways:

    a) Clicking on the summary link at the top of the application home page, or
    b) Type the name of the campus or the county-district campus number (CDCN) into the org finder at the top of the application home page.

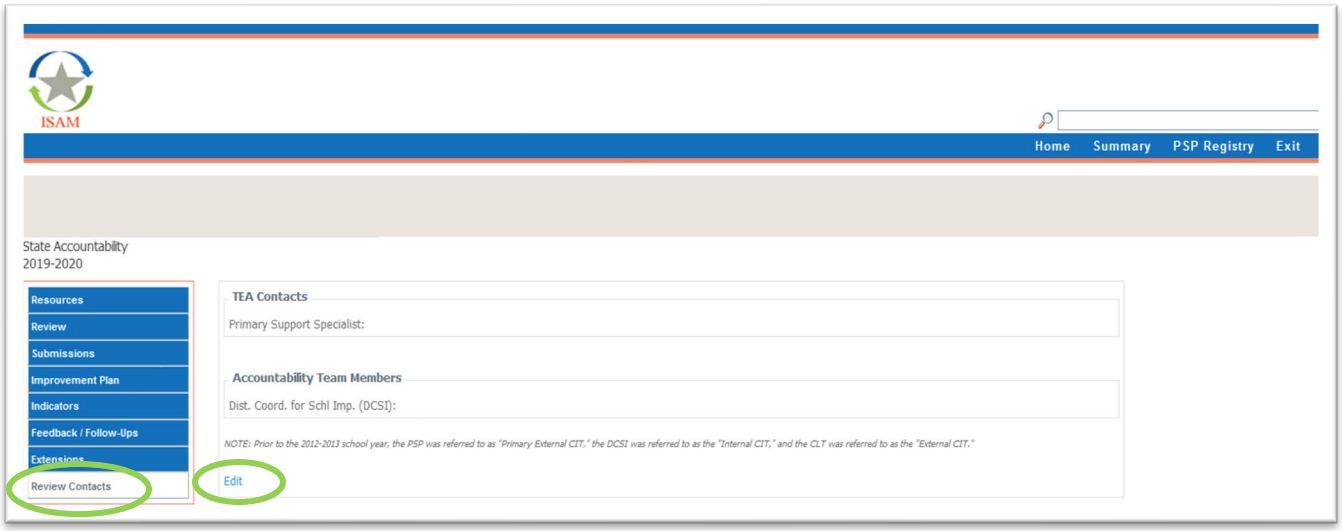
Once the campus/district name is visible, double-click it to be directed to the Event Summary page.

2. Click the arrow next to the program name to expand the program and reveal the campus review links.





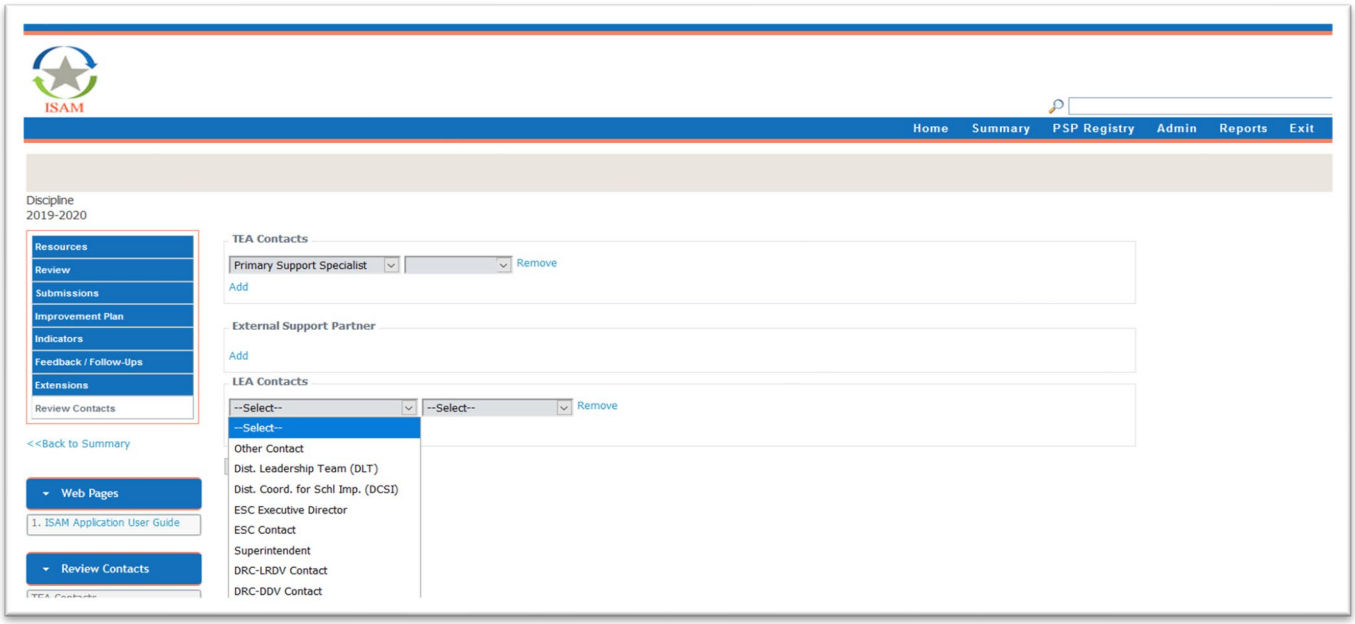
3. Once expanded, click the campus name which will first direct to the Submission table. Select “Review Contacts” from the left-hand navigation bar. Click “Edit”.



4. Click “Add” to assign an individual as a review contact in the “Role” dropdown list, select the appropriate title for the individual.

NOTE: Users may need to click the “Add” link twice. The first box lists the Professional Service Provider (PSP) role and associated names. The second box lists additional roles like, DCSI, Principal, ESC Contact, etc.

5. In the “Name” dropdown list, select the person who will serve in the role you identified in Step 4.



6. Repeat Steps 4-5 until each person who will serve as a review contact has been assigned to the review.

7. Click “Save”.

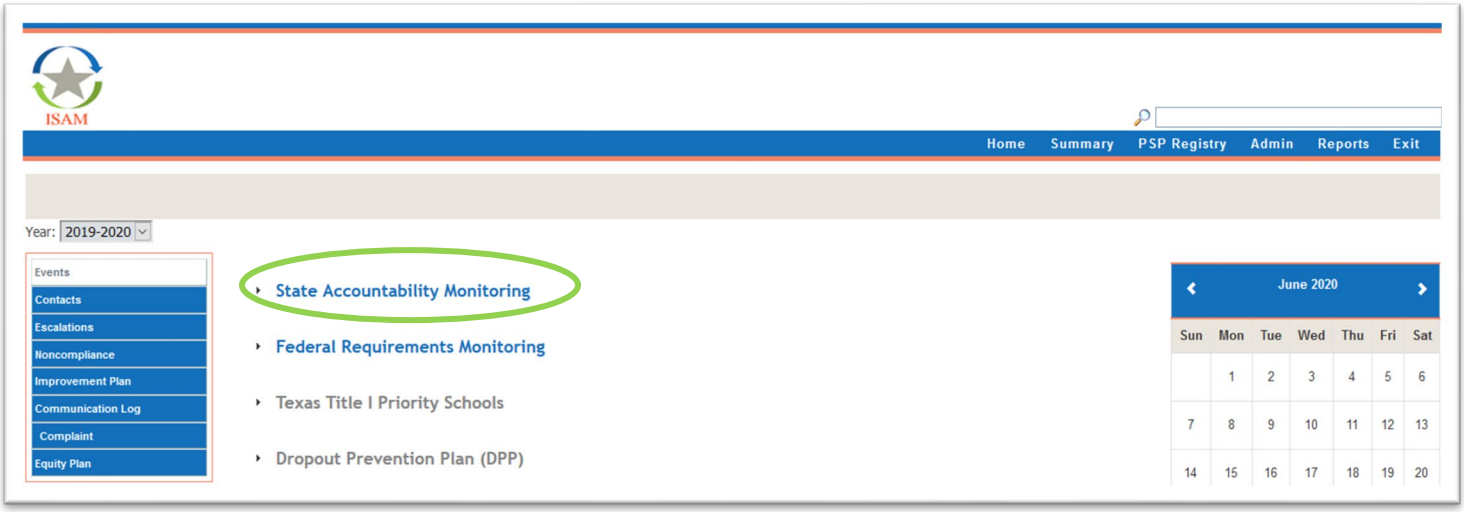
III. Submitting Required Documentation

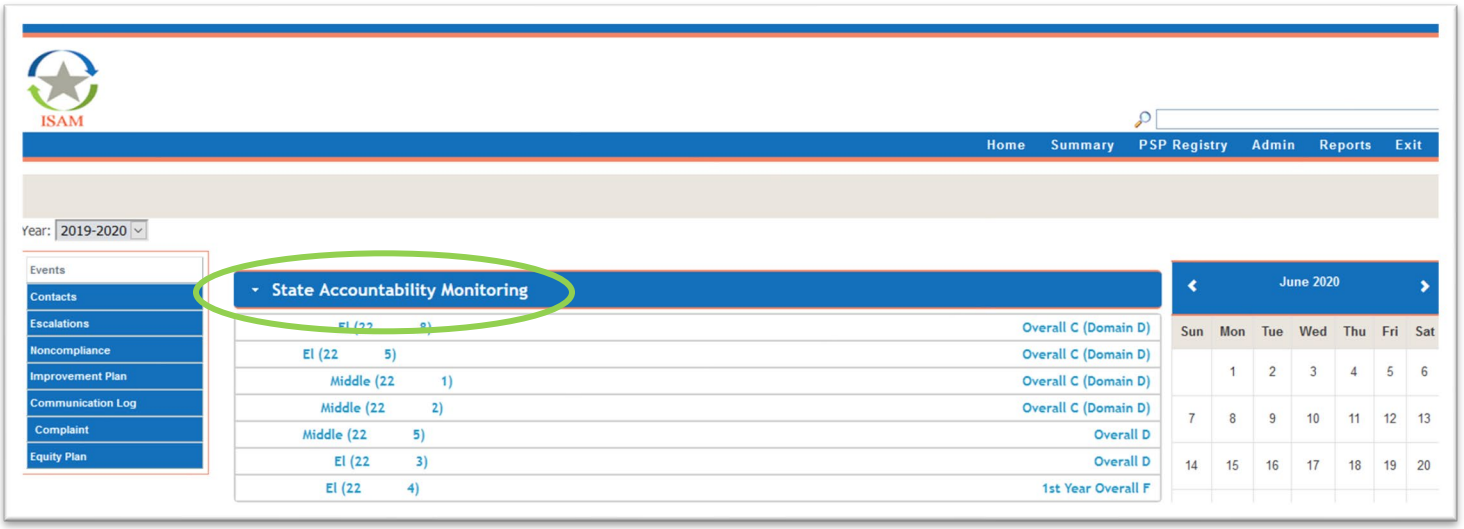
Submission requirements vary depending on the campus/district rating, stage or performance level assigned to the program. To submit these documents to the agency, follow the steps below.

1. Navigate to the campus/district event summary page in one of two ways:
   a) Clicking on the summary link at the top of the application home page, or
   b) Type the name of the campus or the county-district campus number (CDCN) into the org finder at the top of the application home page.

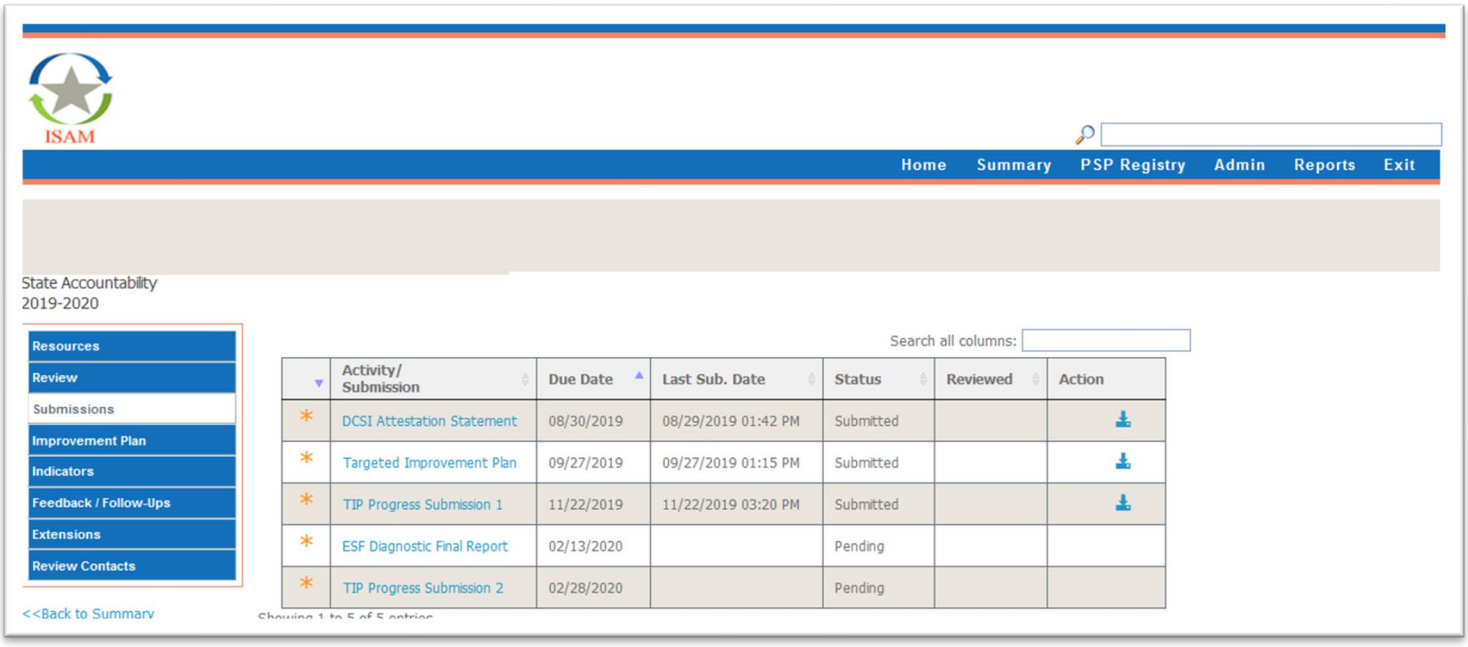
Once the campus/district name is visible, double-click it to be directed to the Event Summary page.

2. Click the arrow next to the program name to expand the program and reveal the campus review links.

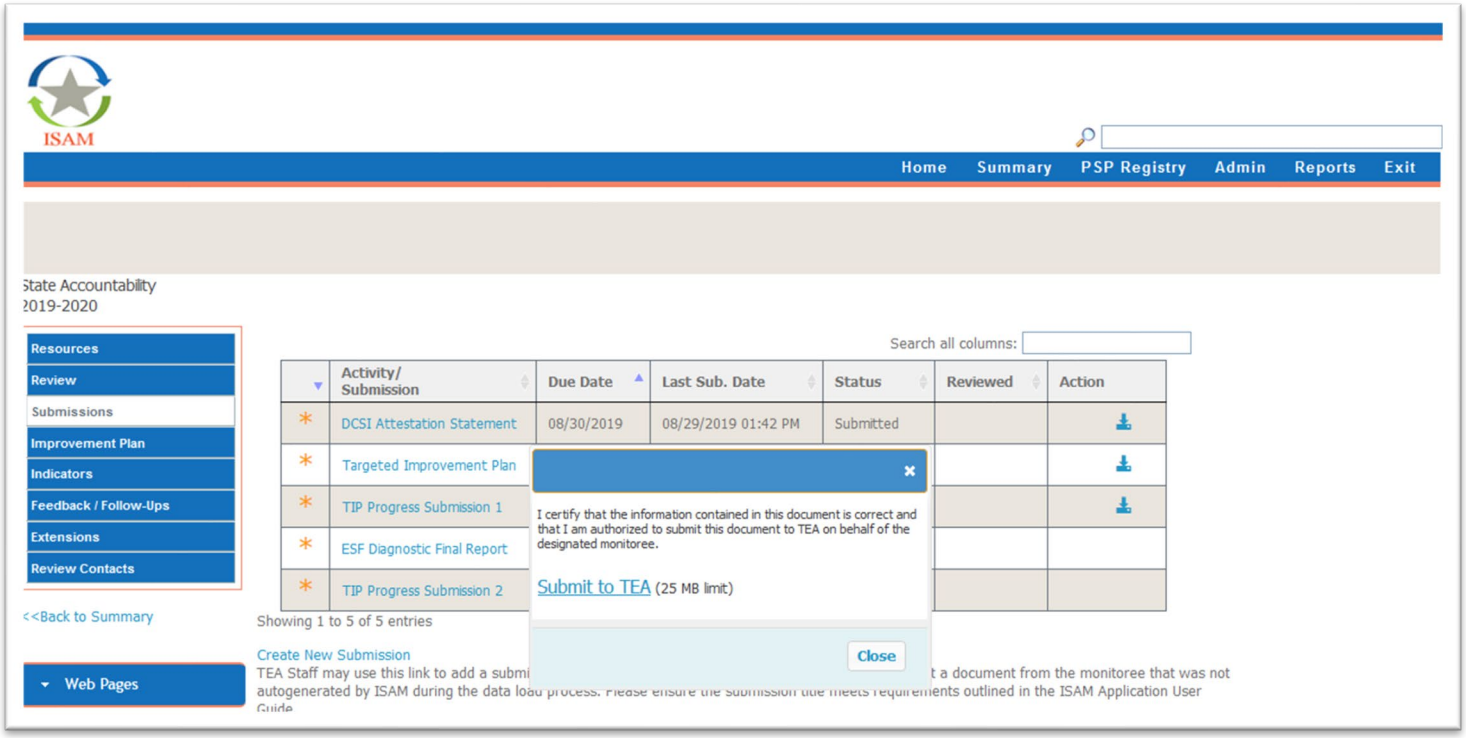




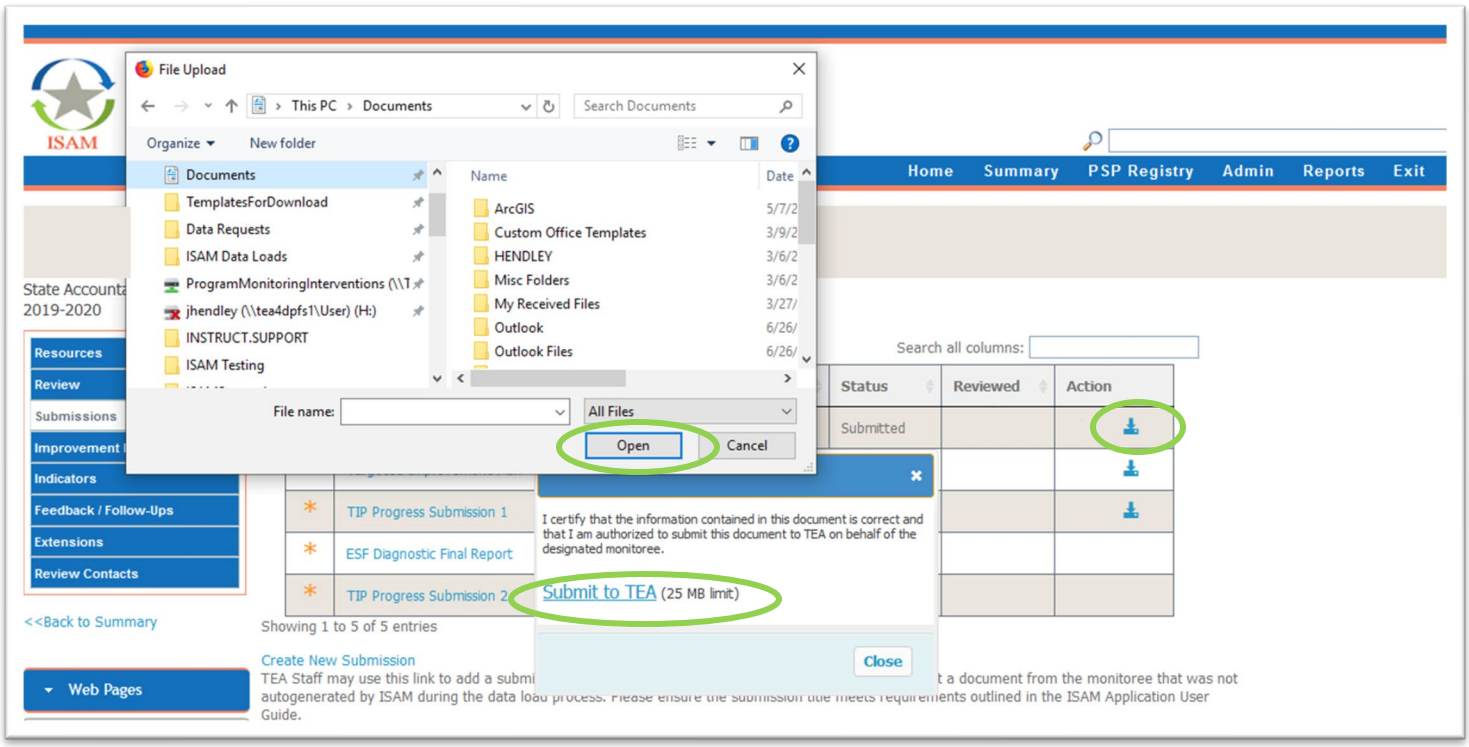
3. Once expanded, click the campus name which will direct to the Submission table. This table lists submissions and due dates for the campus/district.



4. Select the name of the submission and click *Submit to TEA* link when prompted.



5. From the file upload window, navigate to where the document you want to submit is saved on your computer. You may double-click on the name of the document or highlight the name of the document and select *Open* to upload the document to the ISAM submission table.



NOTE: You can verify your submission by refreshing your browser. The *Last Sub. Date* column will now be populated with the date and time you submitted the file. You can also download the document by selecting the 'Download' icon in the *Action* column.

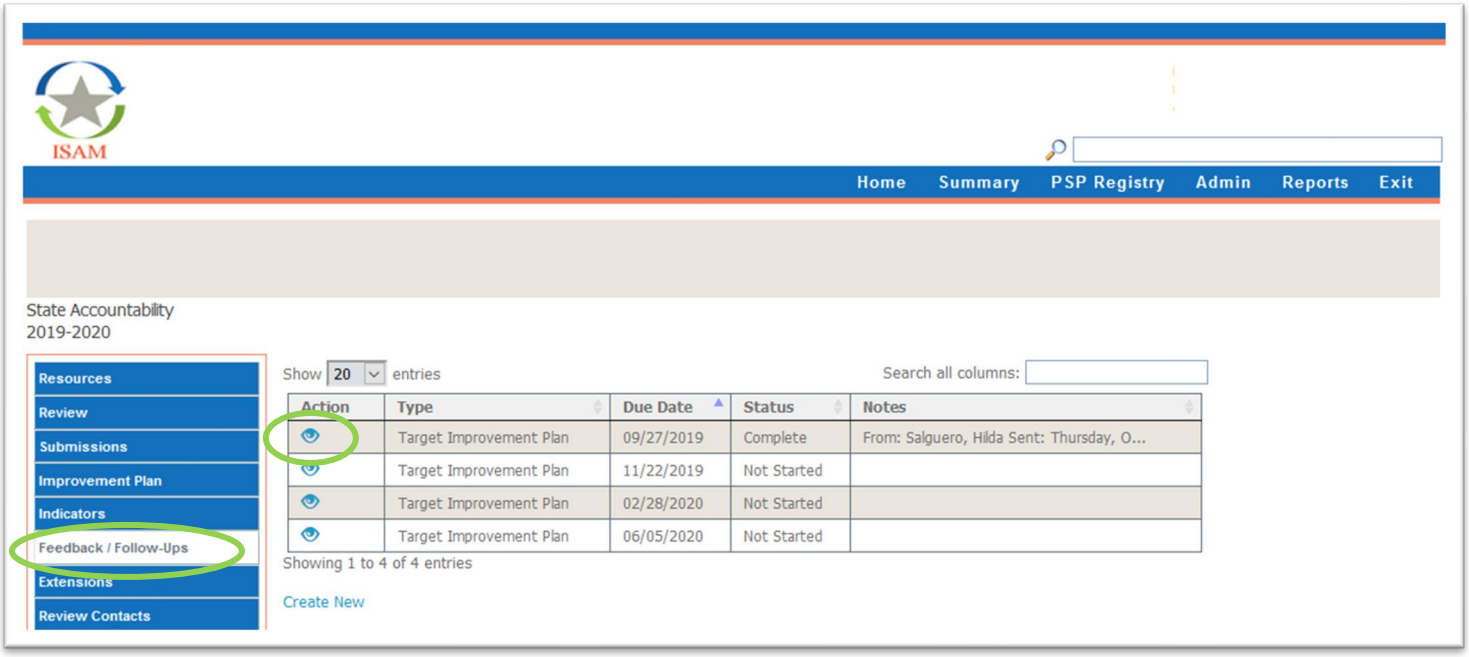
IV. Accessing Feedback/Follow-Up Information

The TEA Specialist assigned to your campus/district will provide feedback regarding submitted improvement plans or other required documents in the Feedback/Follow-ups module in ISAM. To view this information:

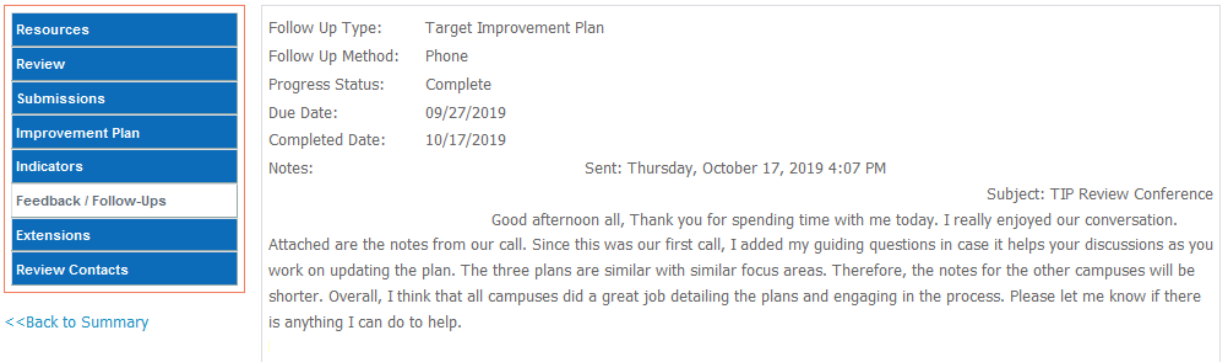
1. Navigate to the campus/district event summary page in one of two ways:
   b) Clicking on the summary link at the top of the application home page, or
   c) Type the name of the campus or the county-district campus number (CDCN) into the org finder at the top of the application home page.

Once the campus/district name is visible, double-click it to be directed to the Event Summary page.

2. Click the Feedback/Follow-ups link on the left-hand navigation bar. This will reveal the Feedback table.



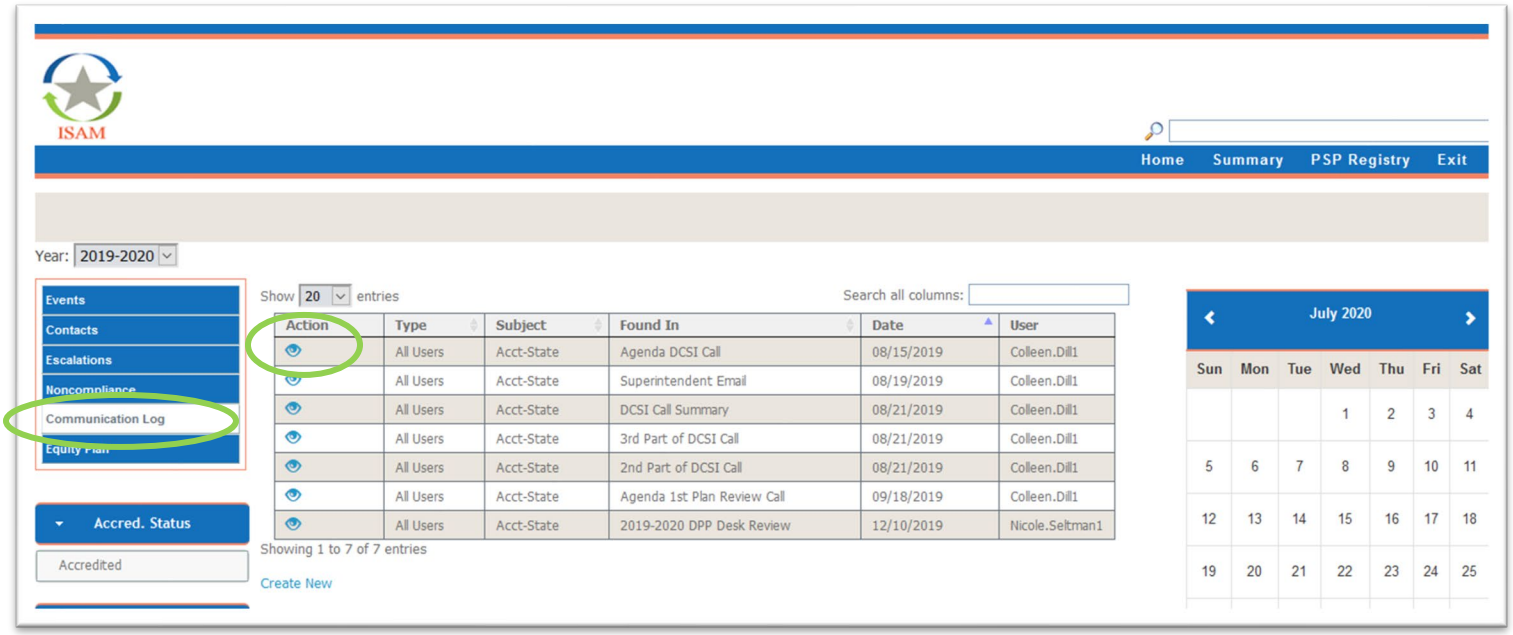
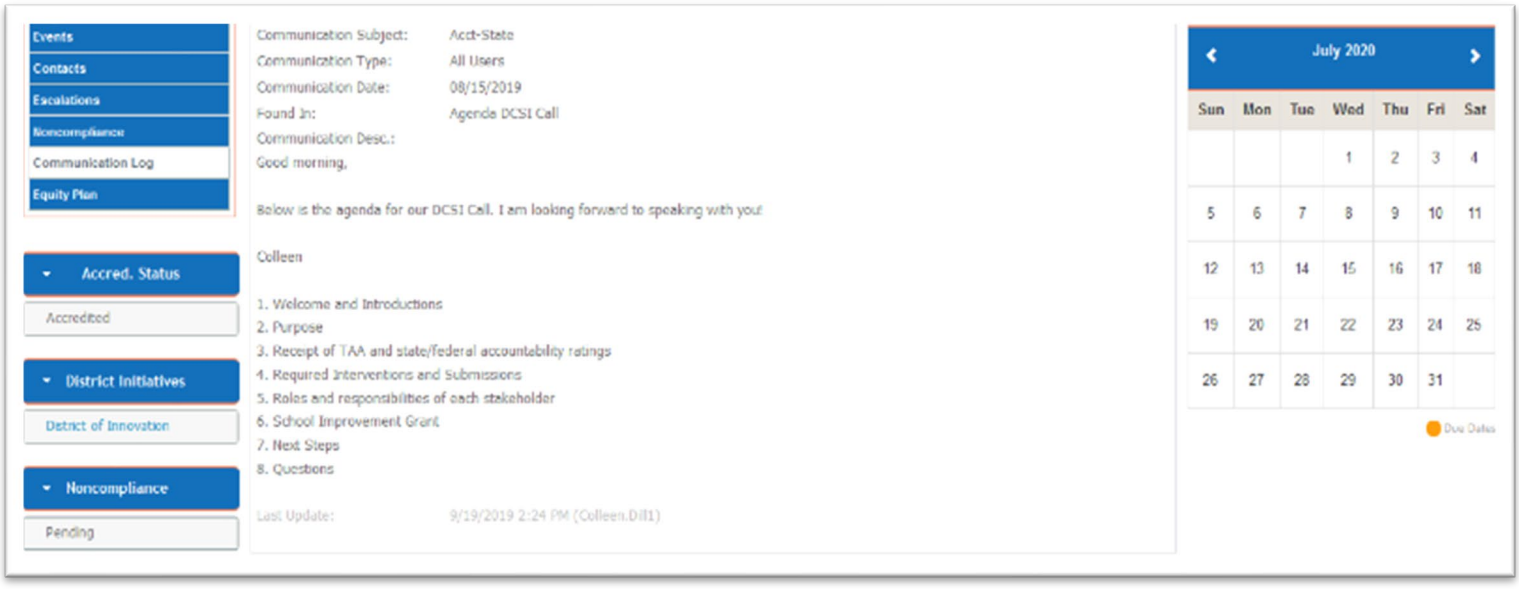
3. You may view a feedback entry by selecting the 'View' icon in the Action column.



V. Accessing the Communication Log

The TEA Specialist assigned to your campus/district will document conversations and summarize processes and expectations in the Communication Log in ISAM. To view this information:

1. Navigate to the campus/district event summary page in one of two ways:
    d) Clicking on the summary link at the top of the application home page, or
    e) Type the name of the campus or the county-district campus number (CDCN) into the org finder at the top of the application home page.

Once the campus/district name is visible, double-click it to be directed to the Event Summary page.

2. Click the Communication Log link on the left-hand navigation bar to reveal the table.
4. You may view an entry by selecting the 'View' icon in the Action column.