



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* under the *Intervention, Stage, and Activity Manager* heading on TEAL menu.
4. This will take you to the ISAM homepage for your district or campus.



Common Actions

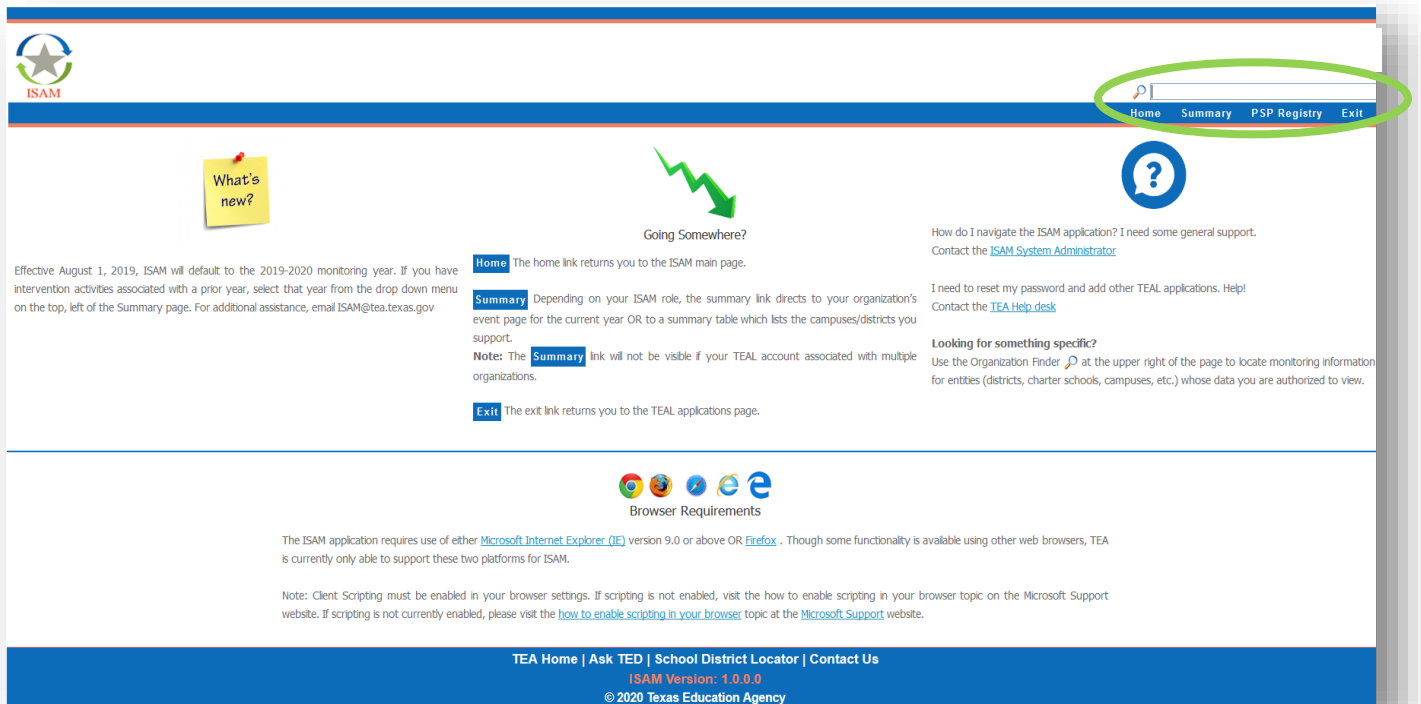
There are several actions you might complete in ISAM; the next sections describe how to complete the most common actions taken by users of the ISAM application.

- 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.





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- 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.

The screenshot shows the ISAM application home page. The navigation menu on the left has "Contacts" highlighted with a green circle. The main content area displays various monitoring categories such as State Accountability Monitoring, Federal Requirements Monitoring, Texas Title I Priority Schools, Dropout Prevention Plan (DPP), Result Driven Accountability, State Performance Plan (SPP) Monitoring, Methods of Administration (MOA) Monitoring, Nonpublic Facility Monitoring, Data Reporting Compliance (DRC), and Data Validation & Verification Monitoring. A calendar for June 2020 is visible on the right side.

The screenshot shows the ISAM application displaying the "Contacts" table. The "Contacts" option in the navigation menu is highlighted with a green circle. The table has the following columns: Action, Name, Position, Programs, and Active Dates. The table contains 7 rows of data. A search bar and a "Show 20 entries" dropdown are located above the table. A calendar for June 2020 is visible on the right side.

Action	Name	Position	Programs	Active Dates
		Prog. Contact	DRC-DDV, DVM-Disc	2015-Present
		Prog. Contact	CTE	2019-Present
		DCSI/CLT/CIT	Acct-State	2020-Present
		Sped Dir.	Acct-Fed, Acct-State, SPED	2020-Present
		Prog. Contact	BE/ESL, SPED	2019-Present
		Prog. Contact	Acct-State, BE/ESL, CTE, ESSA, Nonpublic, SPED	2014-Present
		DCSI/CLT/CIT	Acct-Fed, DRC-DDV, DRC-LRDV, DVM-Assmt, DVM-Disc, DVM-Lvrs, RF, SPED, SPP	2014-Present

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.



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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.

The screenshot shows a table with columns for eye icon, ID, Name, Title, and Dates. The 'Create New' button is circled in green. Below the table, it says 'Showing 1 to 20 of 37 entries' and has navigation buttons: First, Previous, 1, 2, Next, Last.

Eye Icon	ID	Name	Title	Dates
👁		DCSI/CLT/CIT	Acct-State	2020-Present
👁		DCSI/CLT/CIT	Acct-Fed, Acct-State	2019-Present
👁		DCSI/CLT/CIT	Acct-Fed, Acct-State	2019-Present
👁		DCSI/CLT/CIT	Acct-State	2020-Present
👁		Supt.	Acct-Fed, Acct-State, BE/ESL, CTE, DVM-Assmt, DVM-Disc, DVM-Lvrs, DVV, MOA, NCLB, Nonpublic, PAR, RF, SPED, SPP	2014-Present
👁		DCSI/CLT/CIT	Acct-State	2020-Present

The screenshot shows the 'Create New' contact profile form. It includes sections for Basic Info (Salutation, First Name, Middle Name, Last Name, Email, Phone, Address) and Organization Info (Organization, Position, Program). A calendar for June 2020 is visible on the right. The 'Year' dropdown is set to 2019-2020.

Year: 2019-2020

Basic Info:

Salutation: --Select--

First Name:

Middle Name:

Last Name:

Email:

Phone: [Add Phone](#)

Address: [Add Address](#)

Organization Info:

Organization: 2019-2020 - Present [Remove](#)

Position: [Add Position](#)

Program: [Add Program](#)

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.

The screenshot shows the ISAM application home page. The top navigation bar includes 'Home', 'Summary', 'PSP Registry', 'Admin', 'Reports', and 'Exit'. A search bar is located on the right. Below the navigation bar, there is a 'Year:' dropdown set to '2019-2020'. On the left, a sidebar menu lists various categories: Events, Contacts, Escalations, Noncompliance, Improvement Plan, Communication Log, Complaint, and Equity Plan. In the main content area, a list of programs is displayed, with 'State Accountability Monitoring' circled in green. Other programs listed include 'Federal Requirements Monitoring', 'Texas Title I Priority Schools', and 'Dropout Prevention Plan (DPP)'. On the right side, there is a calendar for June 2020.

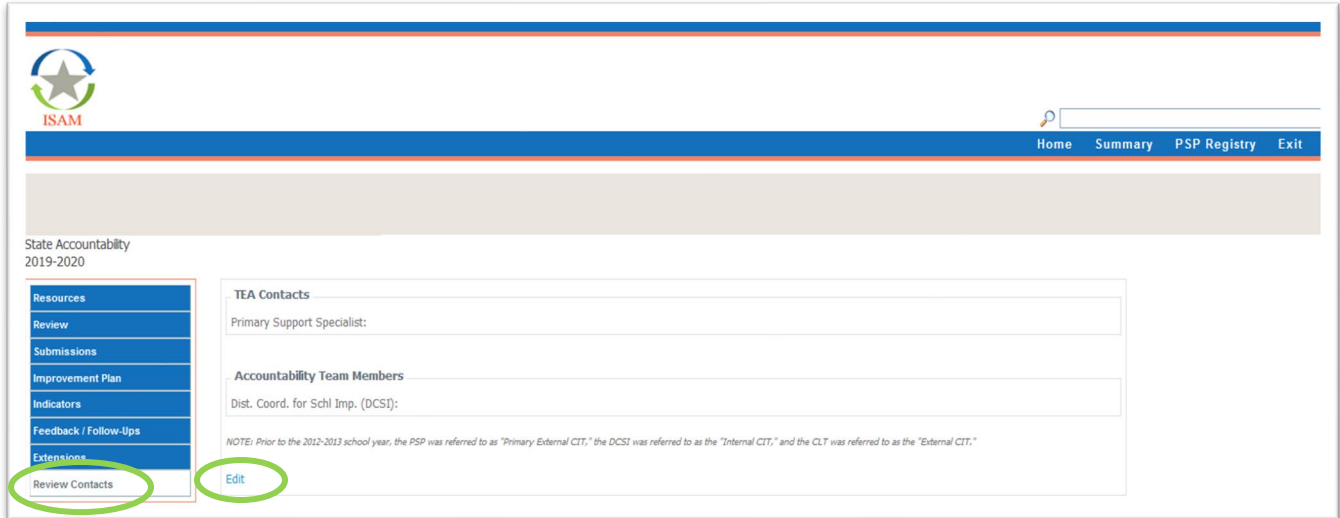
This screenshot shows the ISAM application with the 'State Accountability Monitoring' program expanded. The 'State Accountability Monitoring' link in the sidebar is circled in green. The expanded view shows a table with the following data:

El (22	3)	Overall C (Domain D)
El (22	5)	Overall C (Domain D)
Middle (22	1)	Overall C (Domain D)
Middle (22	2)	Overall C (Domain D)
Middle (22	5)	Overall D
El (22	3)	Overall D
El (22	4)	1st Year Overall F

The rest of the page layout, including the navigation bar, search bar, year dropdown, and calendar, remains the same as in the previous screenshot.



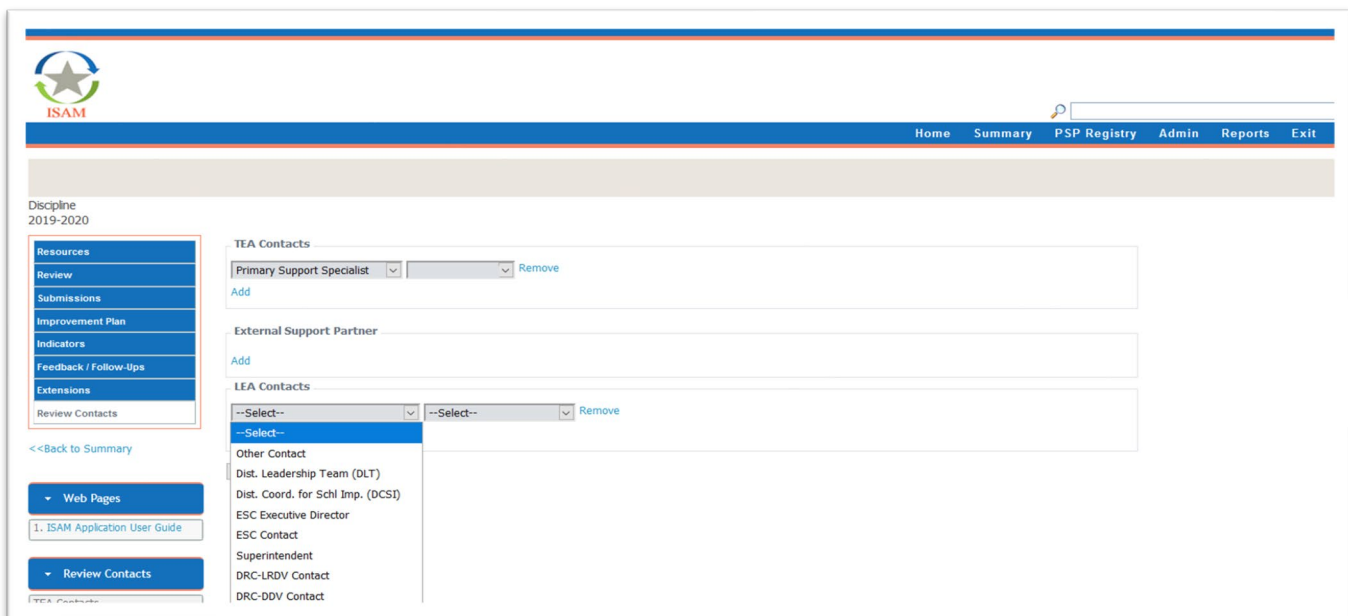
3. Once expanded, click the campus name which will first direct to the Submission table. Select “Review Contacts” from the left-hand navigation bar. Click “Edit”.



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.

The screenshot shows the ISAM application home page. At the top left is the ISAM logo. A navigation bar contains links for Home, Summary, PSP Registry, Admin, Reports, and Exit. Below the navigation bar is a search bar and a 'Year' dropdown menu set to '2019-2020'. On the left is a vertical menu with options: Events, Contacts, Escalations, Noncompliance, Improvement Plan, Communication Log, Complaint, and Equity Plan. The main content area displays a list of programs: State Accountability Monitoring (circled in green), Federal Requirements Monitoring, Texas Title I Priority Schools, and Dropout Prevention Plan (DPP). On the right is a calendar for June 2020.

The screenshot shows the ISAM application with the 'State Accountability Monitoring' program expanded. The left menu is the same as in the previous screenshot. The main content area now displays a table with the following data:

El (22	3)	Overall C (Domain D)
El (22	5)	Overall C (Domain D)
Middle (22	1)	Overall C (Domain D)
Middle (22	2)	Overall C (Domain D)
Middle (22	5)	Overall D
El (22	3)	Overall D
El (22	4)	1st Year Overall F

The right side of the page shows a calendar for June 2020.



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

State Accountability
2019-2020

Resources
Review
Submissions
Improvement Plan
Indicators
Feedback / Follow-Ups
Extensions
Review Contacts

Search all columns:

Activity/ Submission	Due Date	Last Sub. Date	Status	Reviewed	Action
* DCSI Attestation Statement	08/30/2019	08/29/2019 01:42 PM	Submitted		
* Targeted Improvement Plan	09/27/2019	09/27/2019 01:15 PM	Submitted		
* TIP Progress Submission 1	11/22/2019	11/22/2019 03:20 PM	Submitted		
* ESF Diagnostic Final Report	02/13/2020		Pending		
* TIP Progress Submission 2	02/28/2020		Pending		

<<Back to Summary

Showing 1 to 5 of 5 entries

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

State Accountability
2019-2020

Resources
Review
Submissions
Improvement Plan
Indicators
Feedback / Follow-Ups
Extensions
Review Contacts

Search all columns:

Activity/ Submission	Due Date	Last Sub. Date	Status	Reviewed	Action
* DCSI Attestation Statement	08/30/2019	08/29/2019 01:42 PM	Submitted		
* Targeted Improvement Plan					
* TIP Progress Submission 1					
* ESF Diagnostic Final Report					
* TIP Progress Submission 2					

<<Back to Summary

Showing 1 to 5 of 5 entries

Create New Submission
TEA Staff may use this link to add a submission to the system. This link is automatically generated by ISAM during the data load process. Please ensure the submission due date meets requirements outlined in the ISAM Application User Guide.

[Submit to TEA \(25 MB limit\)](#)

At a document from the monitoree that was not



- 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.

The screenshot shows the ISAM application interface. A 'File Upload' dialog box is open, displaying the 'Documents' folder. The 'Open' button is circled in green. Below the dialog box, a submission table is visible with columns for 'Status', 'Reviewed', and 'Action'. The 'Action' column contains download icons, which are also circled in green. A 'Submit to TEA (25 MB limit)' link is highlighted in green in the table. The table contains the following data:

Status	Reviewed	Action
Submitted		

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.

State Accountability
2019-2020

Resources
Review
Submissions
Improvement Plan
Indicators
Feedback / Follow-Ups
Extensions
Review Contacts

Show 20 entries Search all columns:

Action	Type	Due Date	Status	Notes
	Target Improvement Plan	09/27/2019	Complete	From: Salguero, Hilda Sent: Thursday, O...
	Target Improvement Plan	11/22/2019	Not Started	
	Target Improvement Plan	02/28/2020	Not Started	
	Target Improvement Plan	06/05/2020	Not Started	

Showing 1 to 4 of 4 entries
Create New

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

Resources
Review
Submissions
Improvement Plan
Indicators
Feedback / Follow-Ups
Extensions
Review Contacts

Follow Up Type: Target Improvement Plan
Follow Up Method: Phone
Progress Status: Complete
Due Date: 09/27/2019
Completed Date: 10/17/2019
Notes: Sent: Thursday, October 17, 2019 4:07 PM
Subject: TIP Review Conference

Good afternoon all, Thank you for spending time with me today. I really enjoyed our conversation. Attached are the notes from our call. Since this was our first call, I added my guiding questions in case it helps your discussions as you work on updating the plan. The three plans are similar with similar focus areas. Therefore, the notes for the other campuses will be shorter. Overall, I think that all campuses did a great job detailing the plans and engaging in the process. Please let me know if there is anything I can do to help.

<<Back to Summary



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.

Year: 2019-2020

Show 20 entries

Search all columns:

Action	Type	Subject	Found In	Date	User
	All Users	Acct-State	Agenda DCSI Call	08/15/2019	Colleen.Dill1
	All Users	Acct-State	Superintendent Email	08/19/2019	Colleen.Dill1
	All Users	Acct-State	DCSI Call Summary	08/21/2019	Colleen.Dill1
	All Users	Acct-State	3rd Part of DCSI Call	08/21/2019	Colleen.Dill1
	All Users	Acct-State	2nd Part of DCSI Call	08/21/2019	Colleen.Dill1
	All Users	Acct-State	Agenda 1st Plan Review Call	09/18/2019	Colleen.Dill1
	All Users	Acct-State	2019-2020 DPP Desk Review	12/10/2019	Nicole.Seltman1

Showing 1 to 7 of 7 entries

Create New

Communication Subject: Acct-State

Communication Type: All Users

Communication Date: 08/15/2019

Found In: Agenda DCSI Call

Communication Desc.: Good morning.

Below is the agenda for our DCSI Call. I am looking forward to speaking with you!

Colleen

1. Welcome and Introductions
2. Purpose
3. Receipt of TAA and state/federal accountability ratings
4. Required Interventions and Submissions
5. Roles and responsibilities of each stakeholder
6. School Improvement Grant
7. Next Steps
8. Questions

Last Update: 9/19/2019 2:24 PM (Colleen.Dill1)