



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, methods of administration, and data validation.

The ISAM application allows users to submit required documentation to the agency and track feedback from and communicate with the TEA specialist assigned to support the campus or district.

This user guide provides general instructions for using the ISAM application. If you have questions or concerns not addressed in the guide, please submit a help desk ticket at <https://helpdesk.tea.texas.gov/ISAM/>.

Guide Sections

Requesting an ISAM Account	2
Logging into ISAM	2
Common ISAM Actions.....	3
Creating or updating your contact profile	3-5
Updating another person's profile	6-8
Assigning contact to a program review	9-10
Submitting required documentation	11-13
Accessing Feedback/Follow-up information	14
Accessing the Communication Log	15

Requesting an ISAM 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.

IMPORTANT: The primary email address must be the one associated with the requesting organization. Not a personal account, e.g., Yahoo, Gmail, iCloud. List personal email addresses in the secondary email field.

4. When prompted, choose either **District/Charter School User**, **Campus User** or **Regional Service Center User** as your role.
 - The **District/ Charter School User** role should be chosen by personnel responsible for multiple program areas or intervention and submission activities for multiple campuses in the district.
 - The **Campus User** role should be chosen by personnel responsible for intervention and submission activities for one campus.
 - **Region Service Center User** should be chosen by ESC personnel responsible for multiple program areas or intervention and submission activities for multiple districts in the region.
5. Click **Done**. Then click **Save Changes**.

IMPORTANT: All requests for ISAM access must first be approved by the person(s) designated as TEAL Approver in your organization before the request is routed to the agency (Agency requires up to 3 days to review ISAM application requests) for final approval. If the request is not approved within 5 business days, it will be deleted, and the request process will start over.

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 **Edit My User Information**. Ensure that the primary email address is the one associated with the requesting organization. **Not a personal account, e.g., Yahoo, Gmail, iCloud. List personal email addresses in the secondary email field.**
3. Next, select **My Application Accounts** under the **Self-Service** heading.
4. Click the **Request New Account** button, then follow the same instructions listed in steps 3 -5 of the section above.

Logging Into ISAM

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 ISAM 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.

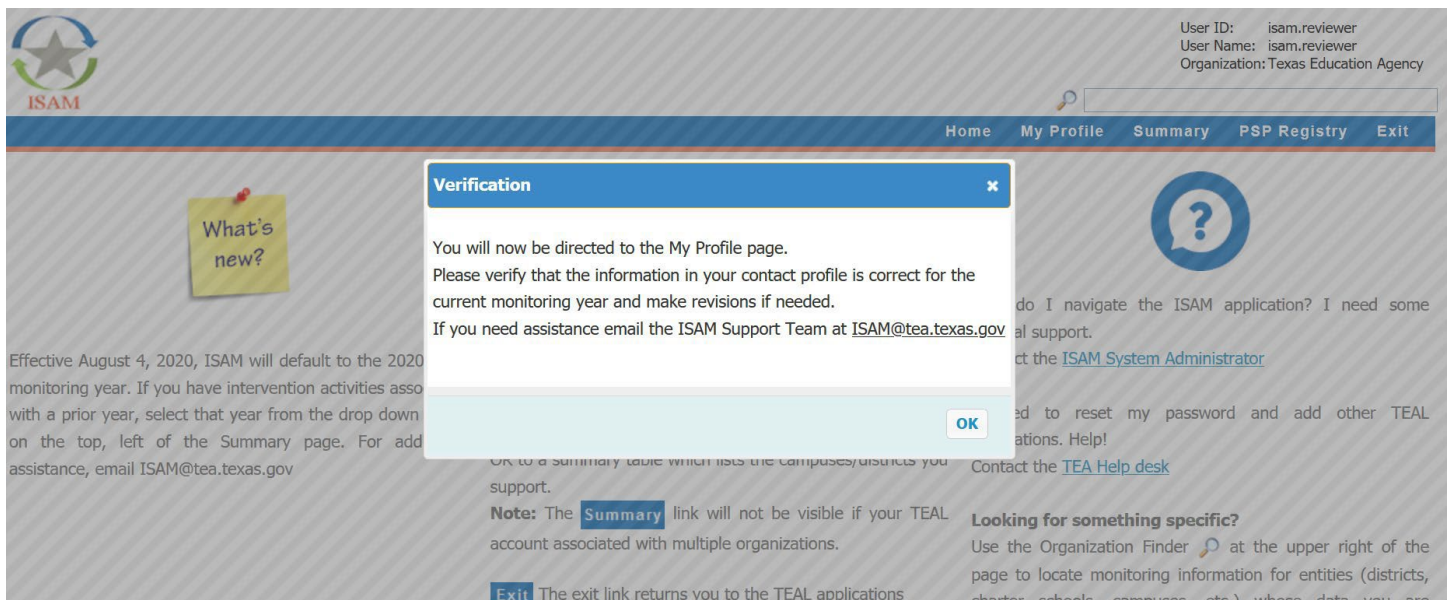
- I. Creating or updating your contact profile
- II. Updating another person's profile
- III. Assigning contact to a program review
- IV. Submitting required documentation
- V. Accessing feedback/follow-up information
- VI. Accessing the Communication Log

I. Creating or Updating Your Contact Profile

IMPORTANT: Only certain user roles can update the contact profiles for another individual. If you need assistance creating or updating a contact profile, please submit a help desk ticket at <https://helpdesk.tea.texas.gov/ISAM/>.

Follow the steps below to create or update your ISAM contact profile.

1. At the beginning of each monitoring year, ISAM will display a contact verification message. When you click 'OK', you will automatically be directed to the My Profile page.



2. If you are new to the ISAM application, the system will pull your name, email, and organization from TEAL. You must update this information by following the steps below:

The screenshot shows the top navigation bar with 'Home' and 'My Profile' links. Below is the 'Basic Info' section with fields for Name (Paul Smith) and Email (paul.smith@austinisd.org). The 'Organization Info' section shows 'Organization: LBJ High School (227901014) (2021-2022 to Present)' and 'Last Update: 8/2/2021 6:20 PM (isam.campususer)'. A green circle highlights the 'Edit' link at the bottom left of the profile card.

- a. Click the 'Edit' link
- b. Complete the contact information fields
 - i. Basic Info: Add your phone number(s) and campus/district address.
 - ii. Organization Info:
 1. Click 'Add Organization' to enter the name or CDCN# for each additional campus you work with.
 2. Click 'Add Position' to select each title you hold.
 3. Click "Add Program" and check the box next to every program you work with.
- c. Click 'Save' to finalize your profile.

The screenshot shows the 'Basic Info' section with fields for Salutation (dropdown), First Name, Middle Name, Last Name, Email, Phone (with 'Add Phone' link), and Address (with 'Add Address' link). The 'Organization Info' section includes an 'Add Organization' link and a table for adding positions and programs. The table has columns for Organization (Texas Education Agency), Start Date (2021-2022), End Date (Present), and a Remove button. Below the table are checkboxes for various programs: Acct-Fed, DPP, MOA, Sped Review Pilot, Acct-State, DRC-DDV, Nonpublic, SPP, BE/ESL, DRC-LRDV, SAI, TTIPS, CTE, and ESSA.

Organization	Start Date	End Date	Remove
Texas Education Agency	2021-2022	Present	Remove

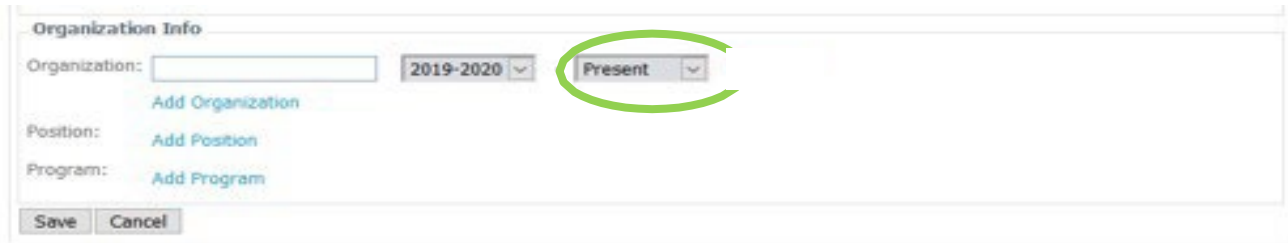
Programs:

<input type="checkbox"/> Acct-Fed	<input type="checkbox"/> Acct-State	<input type="checkbox"/> BE/ESL	<input type="checkbox"/> CTE
<input type="checkbox"/> DPP	<input type="checkbox"/> DRC-DDV	<input type="checkbox"/> DRC-LRDV	<input type="checkbox"/> ESSA
<input type="checkbox"/> MOA	<input type="checkbox"/> Nonpublic	<input type="checkbox"/> SAI	<input type="checkbox"/> SPED
<input type="checkbox"/> Sped Review Pilot	<input type="checkbox"/> SPP	<input type="checkbox"/> TTIPS	

Buttons: Save, Cancel

3. If you worked in the ISAM application in a previous year, you may update your profile, if needed, by following the same step as above.

NOTE: You must change the End Date if you no longer work with a campus or hold a position that is listed in your profile. This will remove your name/position from the LEA Contact table.



4. You may update information in your profile any time by selecting the 'My Profile' link on the Home



ISAM

User ID: ism.reviewer
User Name: ism reviewer
Organization: Texas Education Agency

Home My Profile Summary PSP Registry Exit

What's new?

Going Somewhere?

Home The home link returns you to the ISAM main page.

Summary Depending on your ISAM role, the summary link directs to your organization's event page for the current year OR to a summary table which lists the campuses/districts you support.
Note: The **Summary** link will not be visible if your TEAL account associated with multiple organizations.

Exit The exit link returns you to the TEAL applications page.

How do I navigate the ISAM application? I need some general support.
Contact the [ISAM System Administrator](#).

I need to reset my password and add other TEAL applications. Help!
Contact the [TEA Help desk](#).

Looking for something specific?
Use the Organization Finder  at the upper right of the page to locate monitoring information for entities (districts, charter schools, campuses, etc.) whose data you are authorized to view.

Browser Requirements

The ISAM application requires use of either [Microsoft Internet Explorer \(IE\)](#) version 9.0 or above OR [Firefox](#). Though some functionality is available using other web browsers, TEA is currently only able to support these two platforms for ISAM.

Note: Client Scripting must be enabled in your browser settings. If scripting is not currently enabled, please visit the [how to enable scripting in your browser](#) topic at the [Microsoft Support](#) website.

TEA Home | Ask TED | School District Locator | Contact Us
ISAM Version: 3.8.1.2
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II. Updating Another Person’s Profile

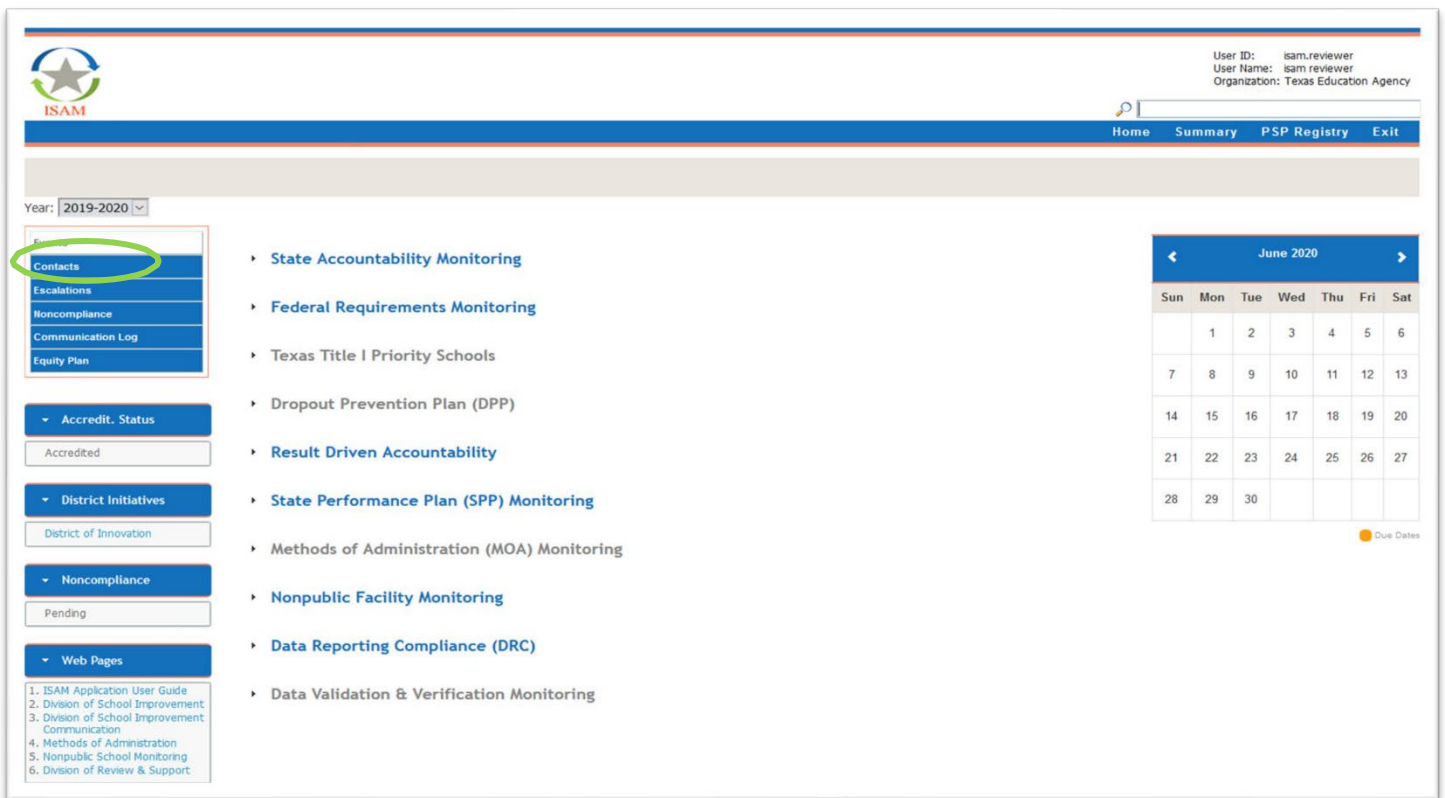
IMPORTANT: Only certain positions can update profiles for other individuals. If you need assistance creating or updating a contact profile, please submit a help desk ticket at <https://helpdesk.tea.texas.gov/ISAM/>.

Follow the steps below to update the profile of another individual.

5. Navigate to the campus/district event summary page in one of two ways:
 - a) Clicking the “Summary” Tab on the Home page, or
 - b) Type the name of the campus or CDN/CDCN# into the org finder on the home page. Once the campus/district name is visible, double-click it to be directed to the Event Summary page.



6. Select “Contacts” from the left-hand navigation bar.



Year: 2019-2020

Show 20 entries

Search all columns:

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

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

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.

IMPORTANT: A user may have multiple roles and/or positions within the district but only **one profile per person** should be displayed in the Contacts table.

If multiple profiles are listed for the same individual, alert the person in the district who has Contact edit rights. You may also send an email to your assigned TEA Specialist or submit a help desk ticket at <https://helpdesk.tea.texas.gov/ISAM/>.

- Click the “eye” icon in the Action column next to the profile you wish to view.

Year: 2019-2020

Show 20 entries

Search all columns:

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

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

8. If the individual is leaving the district - Click the 'Edit' link
- a) In the Organization Info field: change both Organization and Position that has the End Date showing 'Present' to the school year the individual is leaving the organization **OR**
 - b) In the Organization Info field, you may edit an individual's position and program(s):
 - i) Click 'Add Position' to select each title held.
 - ii) Click 'Add Program' and check the box next to each assigned program.
 - c) **Click 'Save' to finalize your profile.**

III. Assigning a Contact to a Program Review

Individuals listed as a 'Review Contact' in ISAM will periodically receive automated emails from the system regarding the status of their assigned review(s). Follow the steps below to assign an individual to a specific program review.

1. Navigate to the campus/district event summary page by:
 - a) Clicking on the 'Summary' Tab on the Home page, or
 - b) Type the name of the campus or CDN/CDCN# into the search bar above the home page.Double-click the campus/district name once visible and this will direct you 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 Home page with the 'Summary' tab selected. The 'State Accountability Monitoring' program is highlighted with a green circle. The page includes a search bar, a navigation menu, and a calendar for June 2020.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

The screenshot shows the ISAM Event Summary page for 'State Accountability Monitoring'. The program name is highlighted with a green circle. The page displays a list of events and a calendar for June 2020.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

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

ISAM

Home Summary PSP Registry Exit

State Accountability
2019-2020

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

TEA Contacts

Primary Support Specialist:

Accountability Team Members

Dist. Coord. for Schl Imp. (DCSI):

NOTE: Prior to the 2012-2013 school year, the PSP was referred to as "Primary External CIT," the DCSI was referred to as the "Internal CIT," and the CLT was referred to as the "External CIT."

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: The first box should remain blank. The second box lists additional roles, e.g., DCSI, Principal, and ESC Contact.

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

ISAM

Home Summary PSP Registry Admin Reports Exit

Discipline
2019-2020

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

TEA Contacts

Primary Support Specialist: [dropdown] [dropdown] Remove

Add

External Support Partner

Add

LEA Contacts

--Select-- [dropdown] --Select-- Remove

Other Contact

Dist. Leadership Team (DLT)

Dist. Coord. for Schl Imp. (DCSI)

ESC Executive Director

ESC Contact

Superintendent

DRC-LRDV Contact

DRC-DDV Contact

<<Back to Summary

Web Pages

1. ISAM Application User Guide

Review Contacts

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

IV. 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.

9. Navigate to the campus/district event summary page by:
 - a) Clicking on the Summary Tab 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 box at the top of the application home page.

Double-click the campus/district name once visible and this will direct you to the Event Summary page.

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

ISAM

Home Summary PSP Registry Admin Reports Exit

Year: 2019-2020

Events

- Contacts
- Escalations
- Noncompliance
- Improvement Plan
- Communication Log
- Complaint
- Equity Plan

State Accountability Monitoring

Federal Requirements Monitoring

Texas Title I Priority Schools

Dropout Prevention Plan (DPP)

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

ISAM

Home Summary PSP Registry Admin Reports Exit

Year: 2019-2020

Events

- Contacts
- Escalations
- Noncompliance
- Improvement Plan
- Communication Log
- Complaint
- Equity Plan


State Accountability Monitoring

EI (22)	Middle (22)	Overall C (Domain D)
81		Overall C (Domain D)
51	51	Overall C (Domain D)
11	11	Overall C (Domain D)
21	21	Overall C (Domain D)
51	51	Overall D
31	31	Overall D
41	41	1st Year Overall F

June 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20

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



[Home](#)
[Summary](#)
[PSP Registry](#)
[Admin](#)
[Reports](#)
[Exit](#)

Resources

Review

Submissions

Improvement Plan

Indicators

Feedback / Follow-Ups




Extensions

Review Contacts

State Accountability


2019-2020

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		

Showing 1 to 5 of 5 entries

12. 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:

[Home](#)
 [Summary](#)
 [PSP Registry](#)
 [Admin](#)
 [Reports](#)
 [Exit](#)

<<Back to Summary

▼	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	I certify that the information contained in this document is correct and that I am authorized to submit this document to TEA on behalf of the designated monitoree.				
*	ESF Diagnostic Final Report					
*	TIP Progress Submission 2	Submit to TEA (25 MB limit)				

Showing 1 to 5 of 5 entries

[Create New Submission](#)
Close

TEA Staff may use this link to add a submission. Please ensure the submission due meets requirements outlined in the ISAM Application User Guide.

a document from the monitoree that was not autogenerated by ISAM during the data load process. Please ensure the submission due meets requirements outlined in the ISAM Application User Guide.

13. 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 document's name or highlight it and select Open to upload it to the ISAM submission table.

The screenshot displays the ISAM web application interface. A 'File Upload' dialog box is open, showing the 'Documents' folder. The 'Open' button is highlighted with a green circle. In the background, the ISAM submission table is visible. The table has columns for 'Status', 'Reviewed', and 'Action'. The 'Submitted' row has a 'Download' icon in the 'Action' column, which is also highlighted with a green circle. Below the table, there is a 'Submit to TEA (25 MB limit)' link, which is also highlighted with a green circle. The left sidebar shows navigation options like 'Home', 'Summary', 'PSP Registry', 'Admin', 'Reports', and 'Exit'. The bottom of the page includes a 'Create New Submission' link and a 'Close' button.

Status	Reviewed	Action
Submitted		

Showing 1 to 5 of 5 entries

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

[Create New Submission](#)

TEA Staff may use this link to add a submission autogenerated by ISAM during the data load process. Please ensure the submission meets requirements outlined in the ISAM Application User Guide.

[Close](#)

NOTE: You can verify your submission by refreshing your browser. The 'Last Sub. Date' column will 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.

V. 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:

14. Navigate to the campus/district event summary page by:

- b) Clicking on the Summary Tab 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 box at the top of the application home page.

Double-click the campus/district name once visible and this will direct you to the Event Summary page.

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

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](#)

16. 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

<<Back to Summary

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.

VI. 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:

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

- d) Clicking on the summary Tab 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 box at the top of the application home page.

Double-click the campus/district name once visible. This will direct you to the Event Summary page.

18. Click the Communication Log link on the left-hand navigation bar to reveal the table.

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