



ISAM Application User Guide 2023-2024



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 contact the ISAM Support Team at ISAM@tea.texas.gov.

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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 yahoo, e.g., Gmail, etc. 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 yahoo, e.g., Gmail, etc. 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.

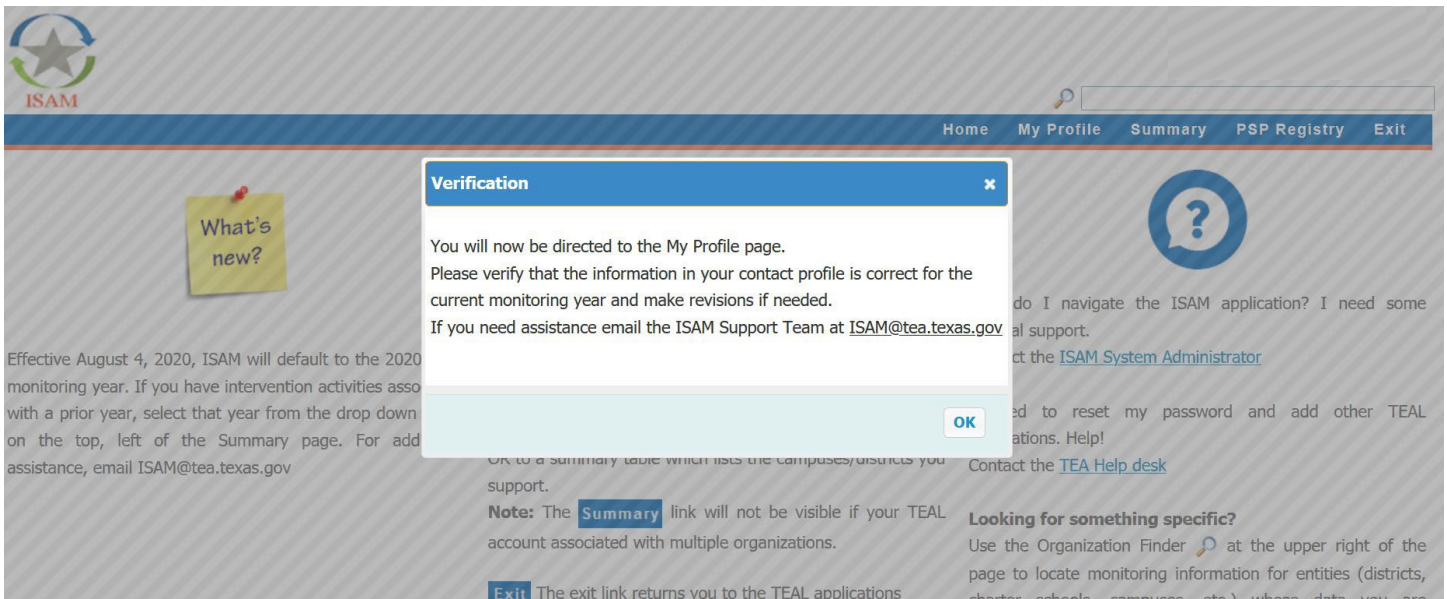
- I. Creating or updating your contact profile
- II. Updating another person's profile
- III. Assigning contact to a program review
- IV. Submitting required documentation
- V. Accessing feedback/follow up information
- VI. Accessing the Communication Log

I. Creating or Updating Your Contact Profile

IMPORTANT: Only certain positions can update profiles for other individuals. If you need assistance creating or updating a contact profile, email the ISAM Support Team at ISAM@tea.gov.

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 be 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 a user profile page with a blue header containing 'Home' and 'My Profile' links. Below the header is a profile card with two sections: 'Basic Info' and 'Organization Info'. The 'Basic Info' section displays 'Name: Paul Smith' and 'Email: paul.smith@austinisd.org'. The 'Organization Info' section displays 'Organization: LBJ High School (227901014) (2021-2022 to Present)' and 'Last Update: 8/2/2021 6:20 PM (isam.campususer)'. A green circle highlights an 'Edit' link located below 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 'Edit Profile' form. It is divided into two main sections: 'Basic Info' and 'Organization Info'. The 'Basic Info' section includes a 'Salutation' dropdown menu (currently set to '--Select--'), and input fields for 'First Name', 'Middle Name', 'Last Name', and 'Email'. Below these are 'Phone' and 'Address' fields, each with a corresponding 'Add Phone' and 'Add Address' link. The 'Organization Info' section features an 'Organization' dropdown menu (set to 'Texas Education Agency'), a date range selector (set to '2021-2022' - 'Present'), and a 'Remove' link. Below this are 'Add Organization' and 'Add Position' links. The 'Program' section contains a grid of checkboxes for various programs: Acct-Fed, Acct-State, BE/ESL, CTE, DPP, DRC-DDV, DRC-LRDV, ESSA, MOA, Nonpublic, SAI, SPED, Sped Review Pilot, SPP, and TTIPS. At the bottom of the form are 'Save' and 'Cancel' buttons.

- 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.

The screenshot shows a form titled "Organization Info". It has three main sections: "Organization:", "Position:", and "Program:". Each section has a text input field and a blue "Add" button. The "Organization:" section also includes a dropdown menu for the year, currently set to "2019-2020", and another dropdown menu for the end date, currently set to "Present". A green circle highlights the "Present" dropdown, with a green arrow pointing to it from the right. At the bottom of the form are "Save" and "Cancel" buttons.

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

The screenshot shows the ISAM application home page. At the top left is the ISAM logo. A navigation bar at the top right contains links for "Home", "My Profile", "Summary", "PSP Registry", and "Exit". The "My Profile" link is circled in green. Below the navigation bar, there are several sections:

- A yellow sticky note icon with the text "What's new?". Below it, a text block states: "Effective August 4, 2020, ISAM will default to the 2020-2021 monitoring year. If you have intervention activities associated with a prior year, select that year from the drop down menu on the top, left of the Summary page. For additional assistance, email ISAM@tea.texas.gov".
- A green arrow icon with the text "Going Somewhere?". Below it, a text block explains: "The home link returns you to the ISAM main page." and "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." It also includes a note: "The Summary link will not be visible if your TEAL account associated with multiple organizations." and "The exit link returns you to the TEAL applications page."
- A blue question mark icon with the text "How do I navigate the ISAM application? I need some general support. Contact the ISAM System Administrator." and "I need to reset my password and add other TEAL applications. Help! Contact the TEA Help desk." and "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."

 At the bottom, there is a "Browser Requirements" section with icons for Internet Explorer and Firefox, and a footer with "TEA Home | Ask TED | School District Locator | Contact Us", "ISAM Version: 3.8.1.2", and "© 2021 Texas Education Agency".

II. Updating Another Person's Profile

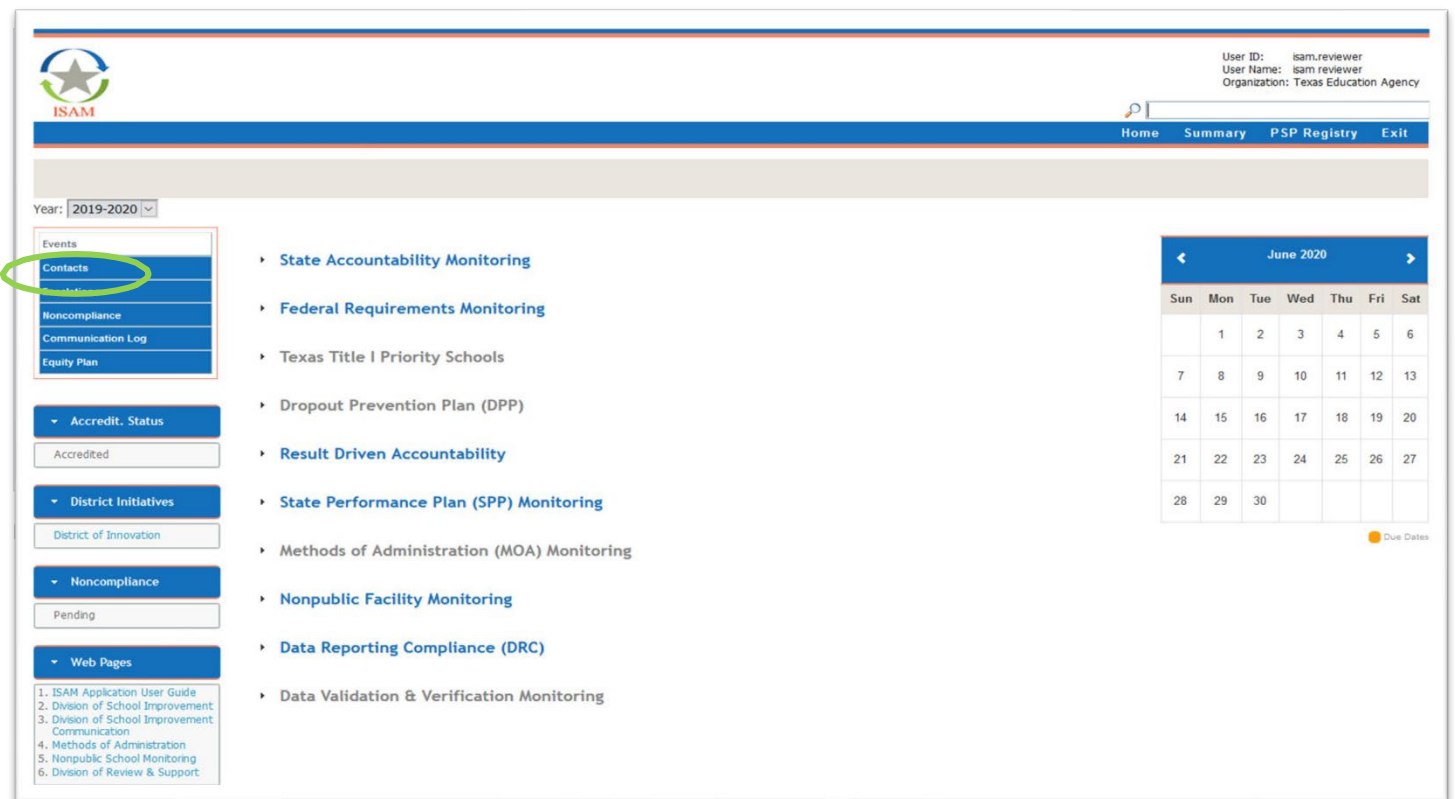
IMPORTANT: Only certain positions can update profiles for other individuals. If you need assistance creating or updating a contact profile, email the ISAM Support Team at ISAM@tea.texas.gov.

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

1. 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.



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.

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

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 the ISAM Support Team at ISAM@tea.texas.gov.

3. 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

4. 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.

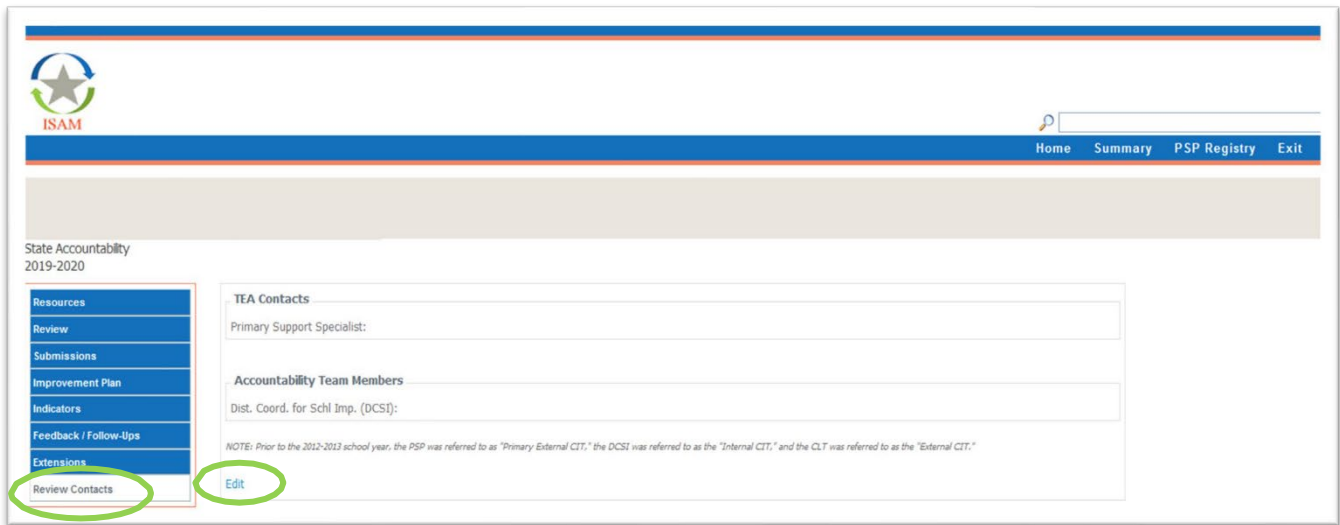
The screenshot shows the ISAM Home page with the 'Summary' tab selected. A search bar is at the top right. Below the navigation bar, the year is set to 2019-2020. On the left, a sidebar menu lists various events, with 'State Accountability Monitoring' circled in green. To the right, a calendar for June 2020 is visible.

The screenshot shows the Event Summary page for 'State Accountability Monitoring', which is circled in green. The page displays a table with the following data:

Event	Count	Overall Status
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

**Campus names have been removed from screenshot*

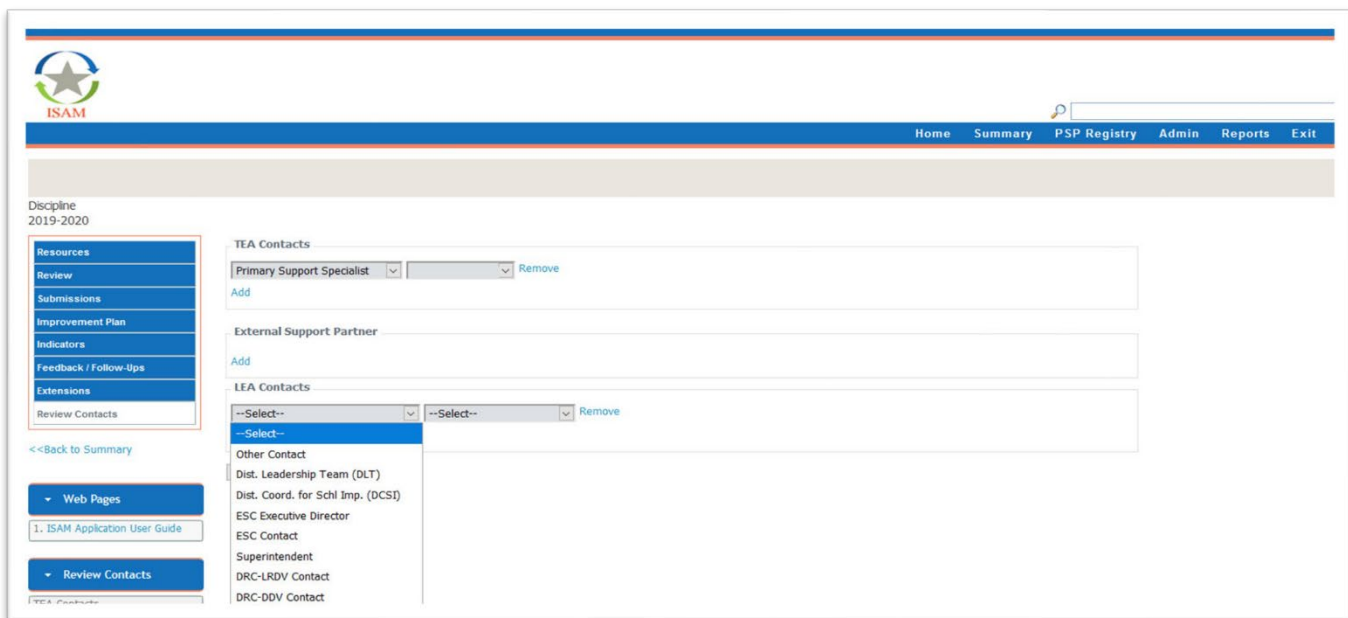
- Once expanded, click the campus name which will first direct you to the Submission table. Select 'Review Contacts' from the left-hand navigation bar. Click 'Edit.'



- 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.

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



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

1. 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.

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 interface. At the top left is the ISAM logo. A navigation bar contains 'Home', 'Summary', 'PSP Registry', 'Admin', 'Reports', and 'Exit'. Below the navigation bar is a search box and a 'Year: 2019-2020' dropdown. On the left is a sidebar menu with 'Events' selected. The main content area shows a list of programs: 'State Accountability Monitoring', 'Federal Requirements Monitoring', 'Texas Title I Priority Schools', and 'Dropout Prevention Plan (DPP)'. The 'State Accountability Monitoring' program is circled in green. To the right is a calendar for June 2020.

The screenshot shows the ISAM application interface with the 'State Accountability Monitoring' program expanded. The program name is circled in green. Below it is a table with the following data:

Level	Count	Overall Rating
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

To the right of the table is a calendar for June 2020.

*Campus names have been removed from screenshot.

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

ISAM

Home Summary PSP Registry Admin Reports Exit

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

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

ISAM

Home Summary PSP Registry Admin Reports Exit

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					

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.

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

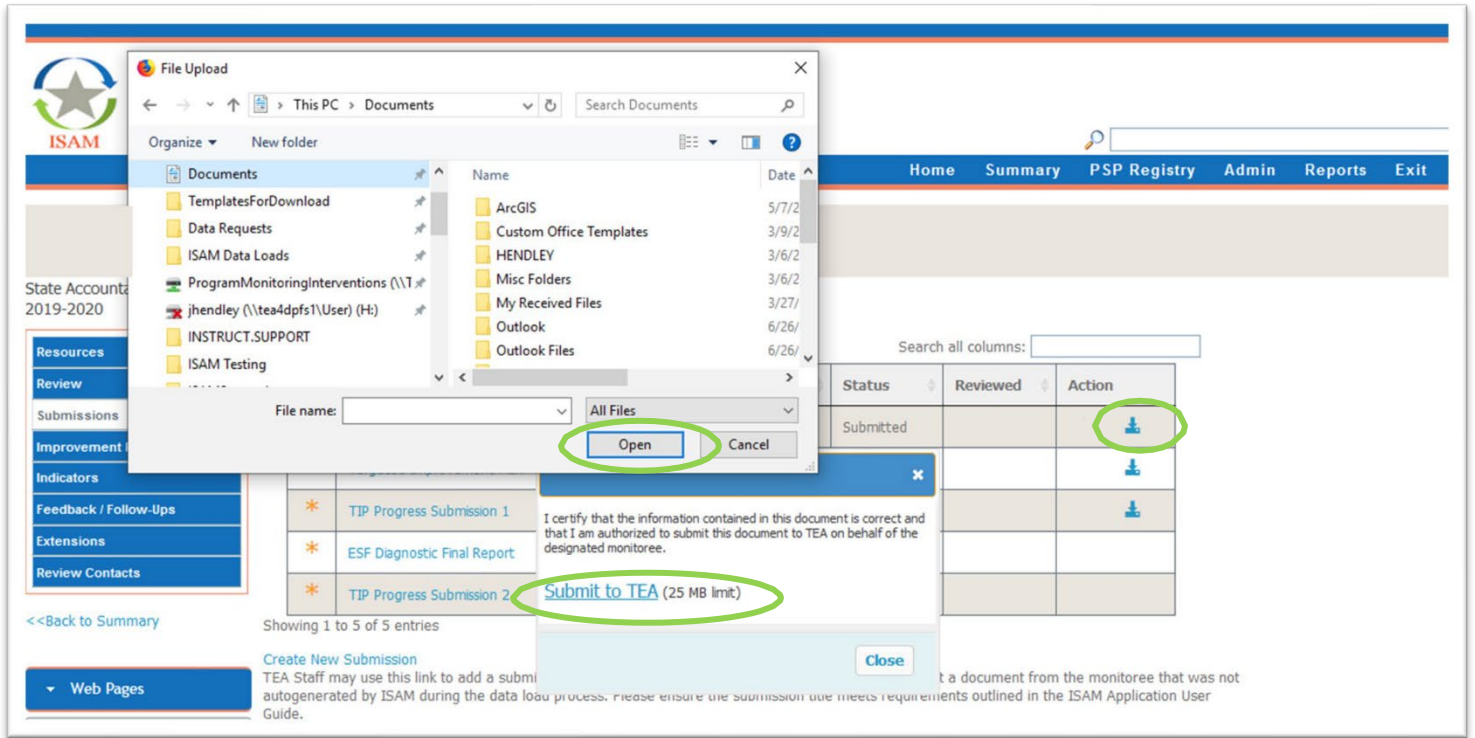
Showing 1 to 5 of 5 entries

Create New Submission
TEA Staff may use this link to add a submission that was not autogenerated by ISAM during the data load process. Please ensure the submission user meets requirements outlined in the ISAM Application User Guide

Close

Web Pages

- 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.



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:





1. 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.

2. 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](#)

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

<<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:

1. 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.

2. 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.