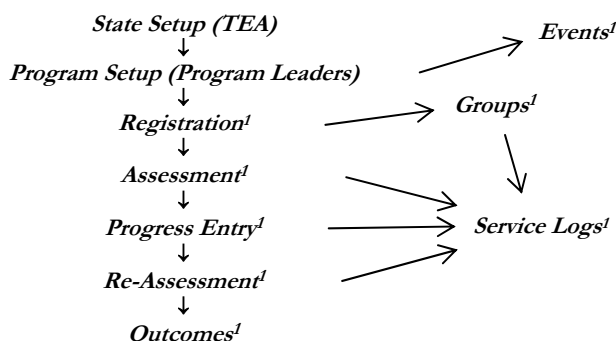# CIS Quick Reference

The Communities in Schools (CIS) application is an online application used to maintain information about local CIS programs and the students who are served by them throughout the state of Texas. The system is connected to PEIMS, so you can select students from there rather than adding them from scratch.

Data entry must be performed in a logical sequence (by):

State Setup (TEA)
↓
Program Setup (Program Leaders) → Events[1]
↓
Registration[1] → Groups[1]
↓
Assessment[1]
↓
Progress Entry[1] → Service Logs[1]
↓
Re-Assessment[1]
↓
Outcomes[1]

Accordingly, you cannot register a student at your program before your program has been set up, or assess a student before the student has been registered.

This document explains how to access and move around in the application, then covers the essential steps in specific data entry tasks in the sequence illustrated above. See the online help system for complete user documentation.

Log On to the System

1. Type http://west.tea.state.tx.us/apps/logon.asp in the browser's address bar.
2. At the logon screen, type your user name and password. If you work with other TEA applications, the links to those applications also appear on the list.
3. At the Application List, click the **Communities In Schools** option.

Remember that TEASE access times out when a program is not been used for 20 minutes. You will lose unsaved changes if this happens. Save your work often.

Note: Do not leave the TEASE logon page open for more than 20 minutes without logging in. Doing so will cause an error when you log on. Close and re-open your browser before logging on.

Navigation

When you first log on and choose CIS from the Application List, the CIS home page appears with a "tree" menu on the left and the CIS logo on the right. Click the expand button (⊞), double-click the CIS program name, or use arrow keys and **ENTER** to drill down into the tree for your program and access the associated screen.
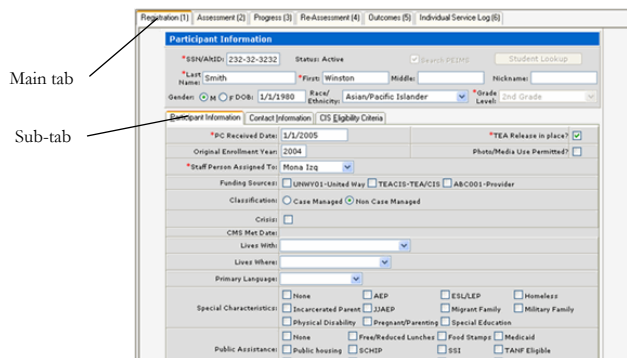
Slow Internet connections and/or low-resolution monitors: Hide the tree menu after you reach the desired Program to speed up screen transitions and to see more of the screen at a glance.

Help icon (ALT+?, then ENTER)

Show/Hide Tree icon (ALT+T)

Tree menu

Current Program and Campus indicators

---

[1]All users except read-only users.

Tabs and Sub-Tabs

Inside major sections of CIS, related overlapping screens are separated by **main tabs** in a row across the top of the screen and **sub-tabs** in a row below that:

Main tab

Sub-tab

Participant Registration Screen

To move to a tabbed screen or sub-tab, click the tab with your mouse or hold down the **ALT** key while pressing the indicated number or underlined letter on the keyboard. Hover the mouse over any tab or button to display its ALT key.

Data is saved and business rules are applied as a unit within a tabbed screen, across all of its sub-tabbed screens. For example, the Registration screen consists of three sub-tabs. Clicking [Save] saves data entered in all those sub-tabs, and moving among them without saving does not discard unsaved data. However, moving to another main tab (to Assessment, for example) without saving **will** discard unsaved data.

Keyboard Shortcuts

You can use the **TAB** key to move from field to field, except when the cursor is in a memo field. Use **CTRL** plus the left- or right-arrow key to move the cursor one word at a time. Use the **SHIFT** key to select text. The usual PC keyboard shortcuts (**CTRL+C**, **CTRL+V**, etc.) may be used in the text and memo fields. When a button has a heavy outline – either by default or because you have tabbed to it – pressing **ENTER** has the same effect as clicking the button.

Most browsers have an AutoComplete setting that you can turn on to enable you to quickly select text values that have been entered before in the same field.

In non-drop-down lists, hold down **CTRL** while clicking to select or de-select multiple non-contiguous options or **SHIFT** while clicking to select or de-select the last option in a contiguous range.

Searching for Records

Always search for a record before entering it to make sure that it is not already present in the application. Name matches can be partial matches based on the first few characters. SSNs must be entered in their entirety.

When a list of items is retrieved from a search, you can usually access details about an item by clicking a link that appears in blue text.

Avoid Using Back Button

Avoid using the [Back] button in your browser unless you are merely viewing data. Using [Back] when you are entering data can cause various problems. Use the tree or (in some screens) the appropriate button to navigate in the application.

Note: When the input cursor (flashing vertical line) is not in a text field and no option list is selected, pressing BACKSPACE has the same effect as clicking the **Back** *button.*

Additional Navigation Tips

Read-Only Screens

If the **Save** button appears "dimmed," like this – Save – the data in the screen cannot be changed. Some screens also indicate this condition with the words "**View only**" at the top. For example, you cannot make changes to an assessment after it has been Completed.

Required Fields and Data Validation

Fields that require an entry or selection are marked with a red asterisk (*). If you omit required data, or enter invalid data, an OK message appears when you try to save.

Saving or Canceling Changes

After updating any data, click Save or Update before leaving the screen or closing the browser. Successful saves will be indicated by an OK message.

To cancel and re-read currently saved data, click Cancel. Moving to another screen also cancels unsaved changes. **You will not be prompted to confirm your choice to move to another screen.**

Deleting Records

When you click a Delete button, either you are prompted to confirm your choice or you must click Save to save the deletion. **After you confirm a deletion, the record cannot be recovered.**

Accessing Help

To open the online help system, click the ? icon in the left portion of the top margin.
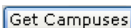
Admin – State Setup *(TEA Admins)*

Start all procedures in this section by expanding the Admin option and clicking State Setup.

Contract Info

1. In the **Contract Info** tab, select the desired Program Name from the drop-down list.
2. Click or tab to the desired field, enter the updated information and click **Save**.

Program Setup

1. Click the **Program Setup** sub-tab.
2. Select the desired Program Name from the CIS Programs drop-down list on the right, then select the desired District from the Districts in Texas drop-down list.
3. Click the ***upper*** Add==> button to add the District to the local CIS program.
4. Click Get Campuses.
5. Click the Campuses to be added. Use CTRL or SHIFT while clicking to select multiple Campuses.
6. Click the ***lower*** Add==> button to add the Campuses to the local CIS program in the appropriate District.
7. If there is a Special Project campus, select the Program and District from the right side of the screen, then enter the Special Project unique ID and name and click Add.

Funding Setup

1. Click the **Funding Setup** tab.
2. Select the desired Program from the drop-down list.
3. To specify funding at the Program level:
   a. Select the Add to All checkbox in the upper-right corner.
   b. Check the applicable checkboxes on the left side of the screen under **Program Level Funding/Service Providers** and click Add==>, OR select the funding sources to be removed from the list on the right and click <==Remove.
   c. Click Update.
4. To specify funding at the Campus level:
   a. De-select the Add to All checkbox in the upper-right corner.
   b. Select the Campus from the drop-down list.
   c. Check the applicable checkboxes on the left side of the screen under **Program Level Funding/Service Providers** and click Add==>, OR select the funding sources to be removed from the **Campus Level Funding/Service Providers** list on the right and click <==Remove.
   d. Click Update.

Note: Click Refresh to load any additional data that might have been entered into this screen by another user since you first opened this screen.

5. To add a funding source, enter the Name, City, and Code, then click Update.
6. To delete a funding source, select it by clicking anywhere in its row in the **Program Level: Funding/Service Providers** list, then click Delete.

Campus Profile

In the Campus Profile screen, the Campus at a Glance sub-tab provides read-only visibility to the Funding Sources, Providers, and Staff of the selected Program and Campus.

Click the Campus Info sub-tab to view or edit various types of Campus-specific data. The # CIS Staff field indicates the number of CIS staff paid by TEA.

Visit this link for Campus Numbers and other related information:
http://www.tea.state.tx.us/perfreport/aeis/

CIS Year and Outcome Date Setup

(Developers and TEA Admins only)

Do not change dates in the middle of the year.

Admin – Program Setup *(TEA Admins, PCs, PMs, EDs)*

Start all procedures in this section by expanding the Admin option and clicking Program Setup.

Contract Info

See state-level **Contract Info** section above. At the Program level, Contract Info is view-only.

Campus Profile

See state-level **Campus Profile** section above.

Provider Org Setup

See state-level **Funding Setup** section above. The Provider Org Setup screen is the same as the Funding Setup screen, except that it shows Provider data rather than Funding Source data.

Provider Individual Setup

Use the Provider Individual Setup screen to maintain data about individuals who serve Participants, including TEA/CIS staff.

1. Select the desired Program from the drop-down list at the top of the screen.
2. *Add:* You do not need to click [Add Provider] unless you have just been viewing an existing Provider. Enter all available information into the fields at the top of the screen. In the lower-left portion of the screen, if you select the CIS Staff checkbox, the other selections there are automatic.
3. Go to the Contact Information sub-tab and enter all available information there.
4. Click [Save].
5. *Edit:* Click [Provider Roster], click the Last Name link, make the desired changes, and click [Save].

Subcode Setup

Use the Subcode Setup screen to set up service codes for local use. Enter all required data, then click [Save].

Provider List *(TEA and Program Admins Only)*

Click the Last Name link to view or edit Provider details, or enter/select new Provider information at the top of the screen, then click [Add Provider].

Open a New Case File for a Participant

Register New Participant

1. In the menu tree, drill down in your program until you see the [Youth] option, and double-click it.
2. To ensure that no record has already been entered, search for the Participant by entering any combination of the following and clicking [Search]:
   a. The entire SSN.
   b. The first part of the last name or first name.
   c. Any list option.
   If the Participant is found, skip to the **Edit a Participant's Case File** section below.
3. Click [Add Participant]. A blank Registration / Participant Information screen opens.
4. Enter the SSN/Alt ID, then click [Student Lookup]. If the Participant is found in PEIMS or at any Campus for any year, his or her demographic data will be loaded into the form. (You can restrict the lookup to the CIS database by unchecking the Include PEIMS checkbox, but this is discouraged.)
5. Enter or select data for every required field in the default Participant Information sub-tab.
6. Enter Contact Information in the middle sub-tab.
7. Check any applicable checkboxes in the CIS Eligibility Criteria sub-tab and click [Save].

Saving a Participant Registration record automatically creates an entry in the Individual Service Log with a duration of one hour.

Notes

1. You cannot add a Participant that is active at another Campus. Staff at the other Campus needs to mark the Participant as Inactive.

2. If TEACIS-TEA/CIS is one of the Funding Sources, then you must select one or more of the checkboxes under the TEA At-Risk Criteria in the CIS Eligibility Criteria sub-tab.

3. Click [Roster] in any Participant screen to display the list of Participants at the current Campus.

4. The Staff Person Assigned To list contains only persons whose Can Assess checkbox is checked in the Provider Individual Setup screen.

Edit a Participant's Case File

1. Click the Participant's Last Name link in the data grid. The Participant's case file opens to the Registration / Participant Information screen.
2. Make the desired data changes, then click [Save].

Assessment

Review all sub-tabs and enter all available information. In each of the Issues sub-tabs, at least one row must have an issue in the AI and TI column checked, or the *Not Applicable* checkbox must be checked.

Grades used should be from the last report card from last year.

The Assessment must be completed by clicking [Complete] within seven calendar days from the date any part of it was first saved. At that time, the following requirements also apply:

1. No Issues sub-tab can have its *Not Applicable* checkbox checked for any issue that is checked in the Recommendation Reason section of the Intake sub-tab.
2. At least one checkbox in the Service Plan sub-tab must be checked.

The Status sub-tab is a view-only screen during the Assessment.

Completing an Assessment automatically creates an entry in the Individual Service Log with a duration of one hour.

Progress

The Progress screen is ready for you to add the first Progress Entry for a participant as soon as you navigate to it. To create an entry after reviewing existing entries, click [Add Entry].

1. Enter an Entry Date. This date must fall between the date of the last Progress Entry and the end date of the current school year.
2. Select the Entry Type from the drop-down list.
3. Rate Participant's progress on the targeted issues by selecting the appropriate option in the row for each applicable issue.
4. Click [Save].
5. To view a Progress Entry, select the Entry Date from the drop-down list and click [View Entry].

Completing a Progress Entry automatically creates an entry in the Individual Service Log with a duration of half an hour.

Re-Assessment

The sub-tabs in the Re-Assessment screen are the same as those in the Assessment screen, except that different data is editable:

- The Intake sub-tab is view-only except for Comments and the Assessment Date, which is required.
- The originally Identified and Targeted issues and the originally selected elements of the Service Plan cannot be de-selected, but new ones can be selected.
- Information in the Status sub-tab can be edited except for Current Staff Person Assigned.

Entering a Re-Assessment or Status change **does not** automatically create a service log entry. To do so manually, click [Post Service Log].

Outcomes

After the Assessment has been Completed, at least one Progress Entry has been created, and June 1 has passed, the you can use the Outcomes sub-tab to enter grades and other data that relates to the

overall outcome of services provided to the Participant. Grades in the Pre Grade column were entered in the Initial Assessment screen.

Individual Service Log

You can access the Individual Service Log by selecting the right-most sub-tab in the Participants section, or by selecting the Individual section of the Service Logs option in your Program tree, then clicking the Last Name link of the desired Participant.

1. *Add (data like a previous entry):* If most of the information you need to enter is the same as a previous entry, click in the row for that previous entry and click [Clone Service]. In the new data row, change whatever data is different, and then click [Save].

2. *Add (data not like a previous entry):* If most of the information you need to enter is different from all previous entries, click [Add Service], then enter or select desired data for the columns in the new Service row in the grid. The Service Date defaults to the current date. If you select a Secondary Provider, it must be different from the Primary Provider member.

3. *Edit:* Click in the desired row, make the desired changes, and click [Save].

4. *Delete:* To delete a service log record entered in error, click in the desired row, click [Delete Service], then click [Save].

   Note: You cannot undo a deletion after you click [Save].

Group Service

Use the two Group Service screens to maintain information about Participant membership in groups and services received by Participants as part of a group. When you select the Group option in the tree, the Group Membership screen appears:

Group Membership Screen

The upper pane shows the membership of the currently selected group in the drop-down list. The lower pane shows all Participants in the selected Program.

Adding a Group

1. Click [Start Fresh Group].
2. Enter a name in the field where it says "New Group Name".
3. *Add new members to a group* by checking their checkboxes in the lower pane and then clicking [Add Selected To Group].
4. Click [Save As New Group].

Removing a Member from a Group

Remove current members from a group by checking their checkboxes in the upper pane and then clicking [Remove Selected From Group]. Members who have actually participated in a Group Service cannot be removed from a Group without first removing them from all Group Services they show to have attended (see next section).

Viewing, Adding, or Editing a Group Service

In the Group Membership screen, select the desired Group. Click [Log Group] to open the Group Service Log Maintenance screen:

Group Service Log Maintenance Screen

This screen works in much the same way as the **Individual Service Log**, except that you must select the members of the group who actually attended the Group Service in the lower pane.

Event Log Maintenance

Click the Events link to open the Event Log Maintenance screen:

Event Log Maintenance Screen

This screen works in much the same way as the **Individual Service Log**, except that you can search for an Event at the top of the screen, and you can enter an Attendee Count for each Attendee Type in the lower pane.

Print Data from the Application

The data on many screens will fit one page wide when printed. Use the **File > Print** option in your browser and see if the output meets your needs. Better results might be obtained by copying and pasting the data into Excel and printing from Excel, or by pasting a screen image into a word processor or graphics program.

Print a Single Help Topic / Instructions

To print a single help topic from the online help system, right-click on the topic text, then choose **Print**. Select any desired options and click **OK**.

Exit / Log Out

To exit the CIS application and return to the Application List, click the [Exit] link in the TEA margin. To log off of the TEASE security system, click **[Log Off]** in the top menu of the TEASE screen.

Download This Document

You can download the latest version of this document from the Quick Reference topic in the online Help system.