aaidd

American Association on Intellectual and Developmental Disabilities

SISOnline® User's Manual

1 **Part One:** Getting Started with SISOnline (SIS-A and SIS-C)

2 **Part Two:** SIS Venture

3 **Part Three:** The User Administration System (UAS)

4 **Part Four:** Integration and Customization Options

American Association on Intellectual and Developmental Disabilities

8403 Colesville Road Suite 900
Silver Spring, MD 20910

www.aaidd.org/sis

Fractal31, Technical Partner

225 Hartshorn Drive
Short Hills, NJ 07078

Support

help@sis-online.org

james@fractal31.com

Last Revised: July 15, 2026

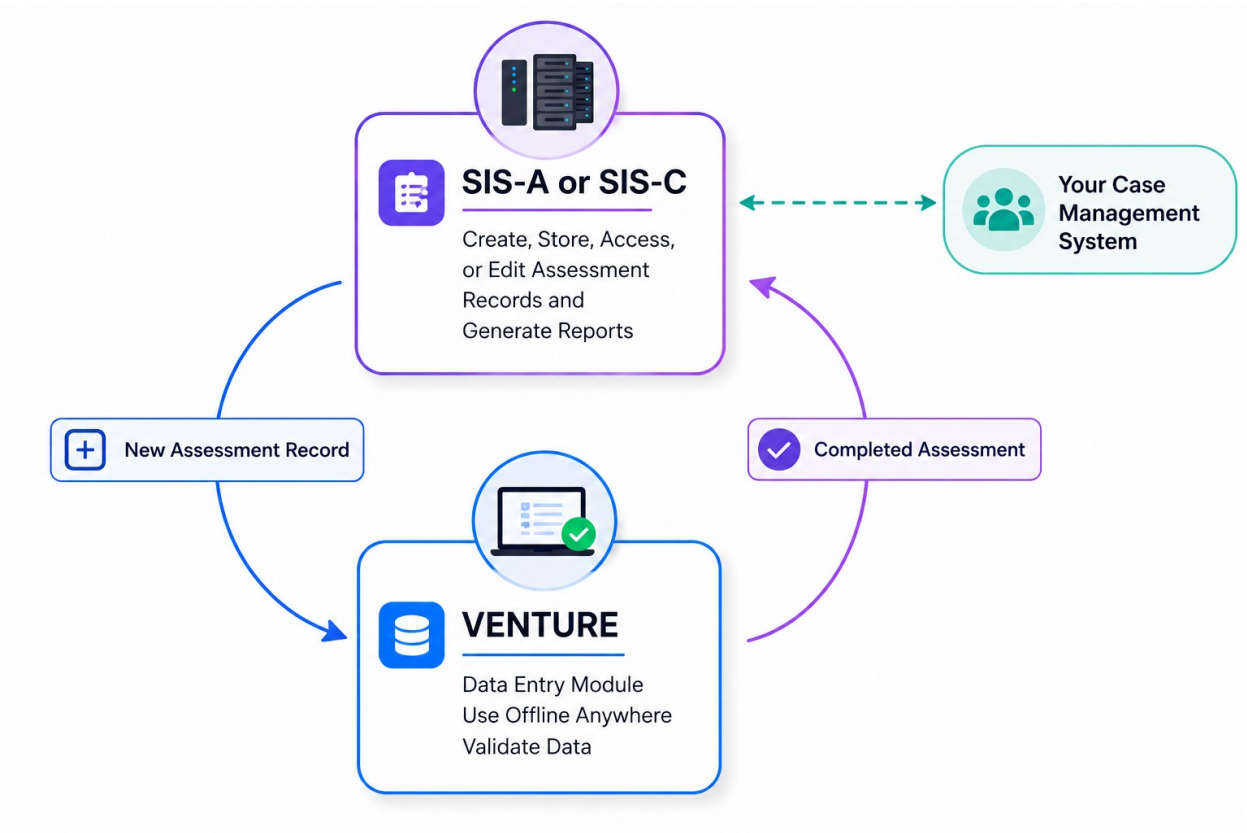
Table of Contents

GETTING STARTED **5**
SYSTEM REQUIREMENTS **7**
SISOnline (web application) 7
SIS Venture (desktop application) 7
PART ONE: GETTING STARTED WITH SISONLINE (SIS-A AND SIS-C) **8**
Logging In and Using SISOnline 8
Logging In Using Multi-Factor Authentication 9
Best Practices in Selecting and Securing Your Password 11
Selecting a Password 11
Securing Your Password 12
Reset Your Password 12
Account Lockout 13
Dashboard and Search SIS Records 14
Dashboard Overview 14
Displaying Records 15
Search Options 16
Search Assessment 17
Search Results Grid and Actions 20
Application Navigation 22
The Sidebar 23
The Profile Menu 25
Navigation Within an Assessment 25
User Preferences 27
Saving Assessment Data 28
Site Preferences 28
Update Profile 28
Change Password (while signed in) 29
The Assessment Record Information 30
Level of Completion – Record Status 30
Assigning or Moving Records 31
Interview Planning and Post Interview 32
Transfer Profile Information to Records 32
Creating New Records 32
Secure Emails – Invitations and Reminders (Optional) 33
Upload Assessment Template (Optional) 33

Using the Assessment Record....33
General Information....33
2. Quality Review (QA)....34
3. Attachments....35
4. Scheduling Review Statuses....35
Accessing Reports....35
Two paths....35
1. CSV / Admin Reports (Sidebar → Reports)....36
Export CSV (typical steps)....36
Getting Help....37
SISOnline Help Desk....37
Help Documents on SISOnline....37
Part Two: SIS Venture....39
A. Security Considerations....39
B. Tips to Get Started....39
C. Using Venture....39
D. Interview Planning and Scheduling....40
E. Post Interview Summary Notes....40
F. Uploading Completed Assessments....40
1. Validation....40
2. Upload (must be online)....40
G. Updates and Issues....41
1. Sync Form Data....41
2. Retrieving the Venture Database (Help Desk)....41
3. Version / OS....41
Part Three: The User Administration System (UAS)....42
A. Enterprise and Users....42
1. Access....42
2. Creating a New User....43
3. Finding an Existing User....43
4. Updating Existing Users....44
5. Profile Changes....44
6. Unlocking a User Account....44
B. Permissions....45
1. Setting memberships....45
2. Role and individual permissions....45
3. Permission definitions (common SIS)....45

C. Passwords (admin).....46
D. Links Between SIS and UAS.....46
E. Banner Feature (Site Announcements).....46
F. Customized Admin Reports.....47
Part Four: Integration and Customization Options.....48
A. Same Credentials / Multi-Factor Authentication.....48
B. Integration with Case Management Systems.....48
C. Case Management and SIS Integration Web Services.....48
Who uses these services.....48
Service endpoint and contract.....49
Typical integration flow.....49
Operations by feature.....49
Support and change control.....52

GETTING STARTED



SISOnline is the central place where **SIS-A** and **SIS-C** assessment work happens online. From SISOnline you create, store, open, and edit assessment records and generate reports. **SIS Venture** is the companion Windows application for field data entry: interviewers can work **offline**, enter and validate ratings on site, then sync completed work back when they have an internet connection. Both applications use the **same SISOnline username and password**.

The diagram above shows how these pieces work together.

SISOnline (SIS-A or SIS-C)
Create, store, access, and edit assessment records, and generate reports. Scheduling, search, assignment/move, reporting, and administrative tasks are done here in the web application.

Venture
The offline data-entry module. Use it anywhere without a continuous internet connection; validate data before uploading.

Your Case Management (CM) System (optional)
If your enterprise has integration enabled, your CM system can exchange assessment data with SISOnline (for example, create or update records or retrieve completed results). That link is between the

CM system and SISOnline—not through Venture. See Part Four for integration details.

Typical assessment cycle

1. A **new assessment record** is created in SISOnline (by a scheduler, assessor, or—when configured—your case management system).
2. The record is assigned to an interviewer. When the interviewer signs in to **Venture**, eligible **New** assessments download for field work.
3. The interviewer completes the interview in Venture (including offline use), then **uploads the completed assessment** to SISOnline once online.
4. In SISOnline, staff continue with review, reporting, and any further edits as permissions allow. If CM integration is active, completed, or updated results can also flow to your case management system.

SIS-A and SIS-C share the same technical steps in most areas of this guide. If your account includes SIS-C, **Create SIS-C** appears in the sidebar; if not, that option is hidden. The same applies to SIS-A.

After you sign in, SISOnline opens to the **Dashboard**. From the Dashboard and the sidebar, you can search records, create assessments, open forms, run reports, and—with the right permissions—use administration features. Details for Venture download and upload are in Part Two.

Note: Some features in this manual depend on your State's or enterprise's contract. Menu items and actions you are not permitted to use will not appear.

SYSTEM REQUIREMENTS

SISOnline (web application)

System requirements for the **SISOnline web application** are as follows:

- A modern web browser. **Google Chrome** is recommended. Current versions of **Microsoft Edge** and **Mozilla Firefox** are also supported for most features.
- A stable internet connection while you are signed in and working in SISOnline.
- A computer or tablet with sufficient memory and processor speed for web applications. As a general guideline, **4 GB of RAM** and an **Intel i5 comparable or newer processor** will meet the minimum for typical use.

If you have difficulty accessing SISOnline from your device or browser, contact the SISOnline Help Desk or your system administrator.

SIS Venture (desktop application)

SIS Venture is a **Windows desktop application** installed on your local computer. It is not compatible with iOS or Android devices. **Microsoft Surface Pro** tablets running Windows are compatible.

System requirements for Venture are similar to SISOnline: **4 GB of RAM** and an **Intel i5 comparable or newer processor** will meet the minimum. Venture is designed for **Windows 11** or newer desktop and laptop computers.

Venture requires an internet connection for the **first login** so that it can synchronize with SISOnline. After the initial sync, Venture may be used **offline** to conduct interviews. Upload completed assessments when you have internet access.

Note: Venture is not a long-term storage module. Do not keep completed records on Venture—upload them to SISOnline when the interview is completed.

If you have difficulty accessing SISOnline or Venture from your device, contact the SISOnline Help Desk or your system administrator.

PART ONE: GETTING STARTED WITH SISONLINE (SIS-A AND SIS-C)

Logging In and Using SISOnline

Basic guidelines are provided here for getting started with the SISOnline system. This version of SIS is designed with the user in mind. The organization of menus and pages is intended to make it easier to find records, complete interviews, and manage your work. This user's guide is provided to help as you encounter questions while using SISOnline.

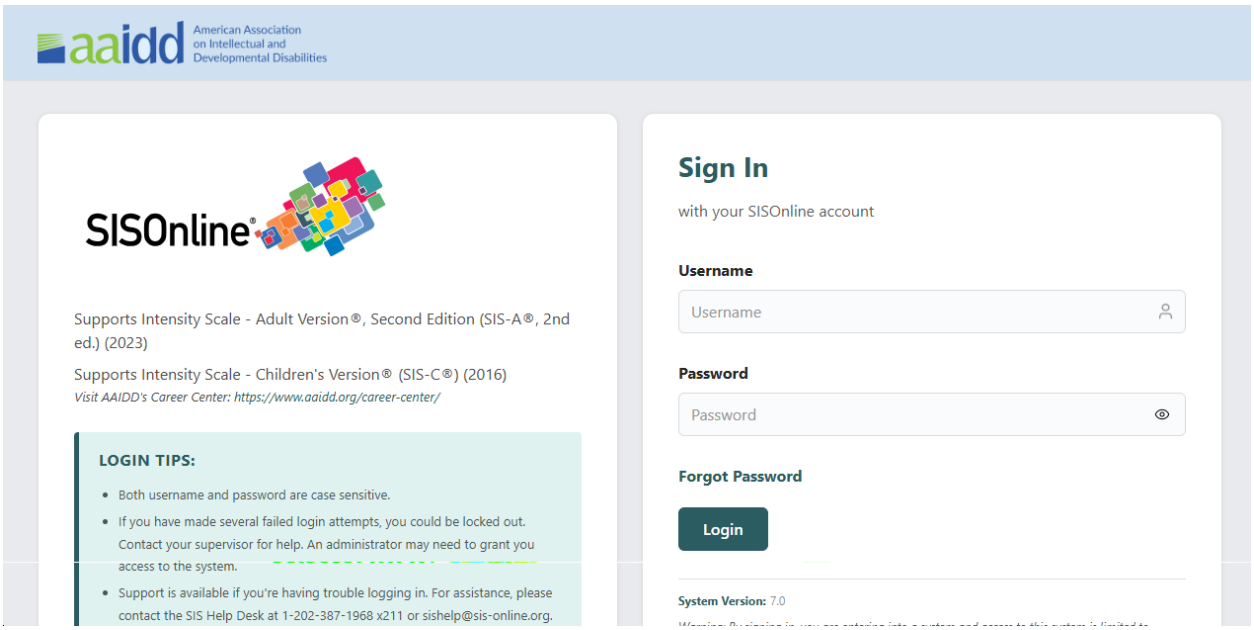
Navigate to your organization's **SISOnline sign-in page** and enter your **Username** and **Password**. Click **Login**. Login credentials are **case sensitive**.

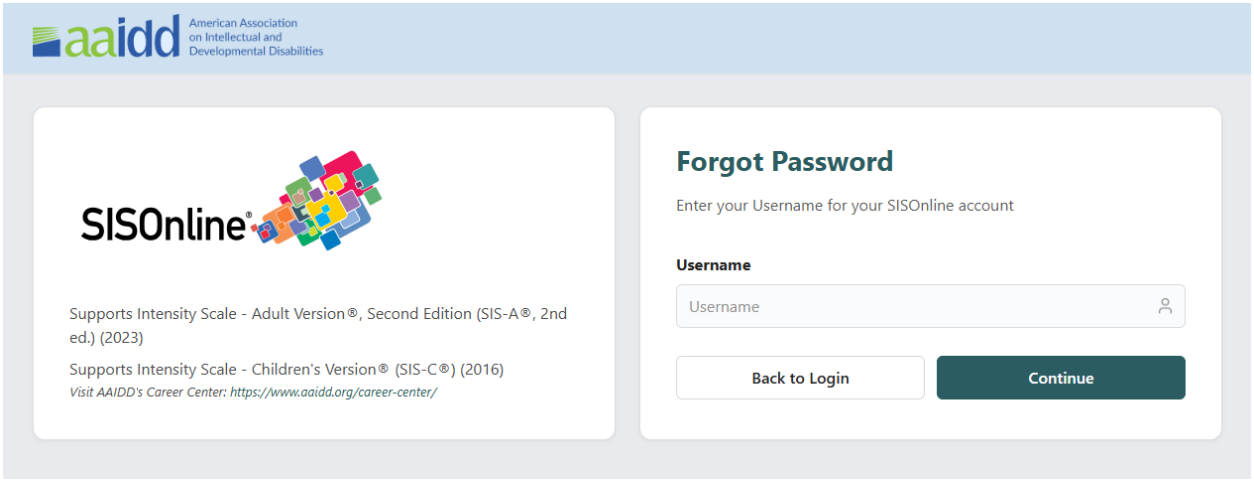
The sign-in page also displays **Login tips**, including reminders about case sensitivity, account lockout, and Help Desk contact information. Read these tips if you are signing in for the first time or if you have had difficulty logging in.

If a **site announcement** is active for your system, enterprise, or group, a banner may appear on the login page. Click **Close** to dismiss the banner and continue signing in.

Upon initial login, the temporary password provided for a new account may require you to change your password. If you are prompted to change your password, follow the on-screen instructions or use **Reset Password** from the account menu after you sign in (see Section 6 below). This is also a suitable time to update your user profile so that your contact information can flow into assessment records you create. Select **Update Profile** from the account menu after you sign in (see Part One, Section D). If you have any difficulty with login, ask your supervisor or email the **HELP DESK** at **help@sis-online.org**

After a successful login (and completion of multi-factor authentication when required), you will be directed to the **Dashboard Overview** page. Use the **sidebar** on the left to open **Search SIS Records**, **Create SIS-A**, **Create SIS-C**, **Reports**, and other areas available to your account.



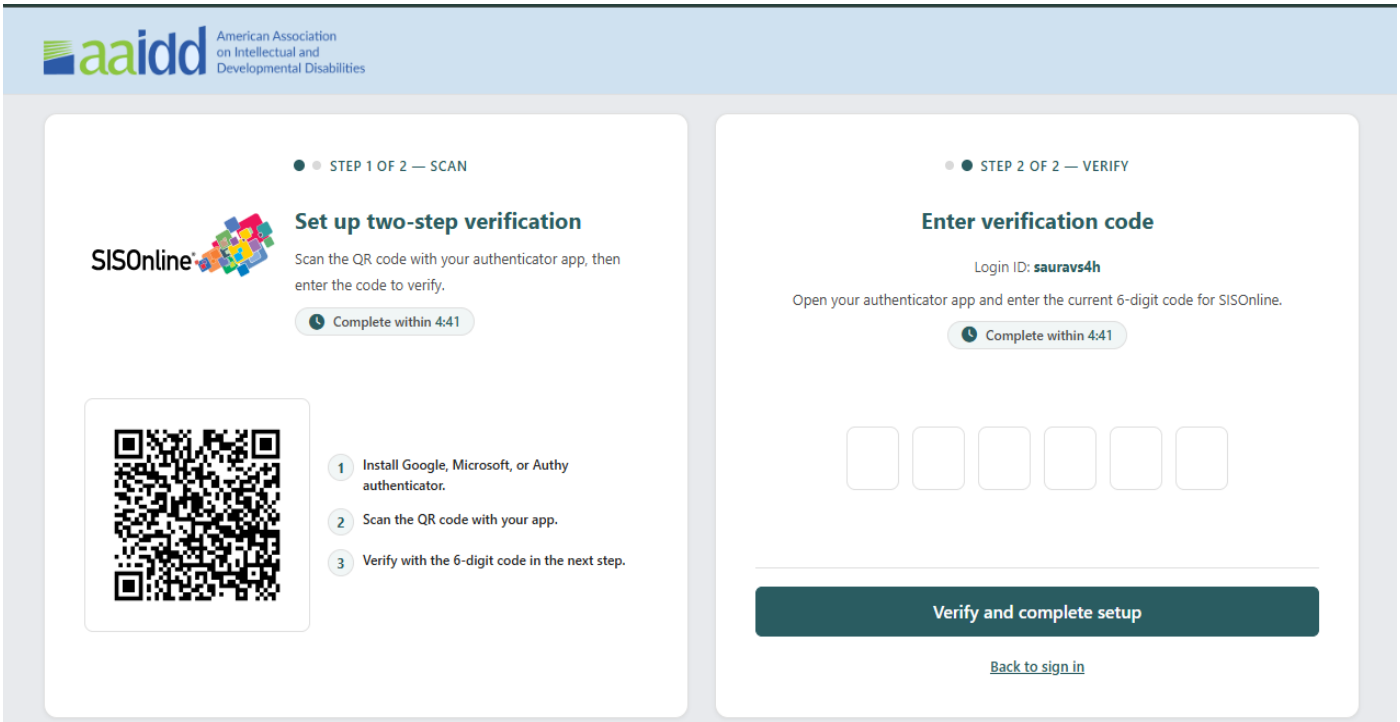


Logging In Using Multi-Factor Authentication

Multi-Factor Authentication (MFA), also called **two-step verification**, may be required for logging in to SISOnline. The purpose is to have users verify through an additional means that they are the actual user. When MFA is enabled for your account, you must enter a **six-digit code** from an authenticator application on your smartphone or other device after entering your username and password.

Please contact the SISOnline Help Desk if you have questions while using SISOnline

Monday - Friday, 9am– 5pm. (Eastern) at help@sis-online.org



First-time setup (enrollment)

If you have not yet enrolled in MFA, you will be directed to the **Set up two-step verification** screen after you enter your username and password.

How to complete MFA enrollment:

a. On the sign-in page, enter your login ID and password, then click **Login**.

b. When the setup screen appears, follow **Step 1 of 2 — Scan**. A **QR code** is displayed on the screen.

c. Install an authenticator application on your smartphone if you do not already have one. SISOnline supports common applications such as **Google Authenticator**, **Microsoft Authenticator**, or **Authy**. Allow the application to access the camera if prompted.

d. Open the authenticator application and add a new account by scanning the QR code displayed on your computer screen.

e. Move to **Step 2 of 2 — Verify**. Open your authenticator application and enter the current **six-digit code** shown for your SISOnline account.

f. Click **Verify and complete setup**.

Note: Authenticator codes refresh periodically (typically every 30 seconds). Enter the current code before it expires. You must complete MFA enrollment within the time allowed on the setup screen. If your session expires, return to the sign-in page and log in again to restart setup.

Returning users (verification)

If you have already enrolled in MFA, after you enter your username and password,you will be directed to the **Enter verification code** screen.

a. Open your authenticator application.

b. Enter the current six-digit code for your SISOnline account.

c. Click **Verify**.

d. Upon success, you will be directed to the SISOnline **Dashboard**.

If you need to cancel and return to the sign-in page, click **Back to sign in**.

Best Practices in Selecting and Securing Your Password

Unauthorized users typically gain access to a site due to weak passwords or if a password was not updated when required. Each SISOnline user has a responsibility to protect the data by selecting a strong password and safely managing it.

Selecting a Password

Strong passwords have the following characteristics:

- Contain both upper- and lower-case characters (e.g., a–z, A–Z).
- Have digits and punctuation characters as well as letters (e.g., 0–9, !@#$%^&*()_+|~-={}[]:";'<>?).
- The password must meet the minimum length requirement of **10 characters**. The **Reset Password** screen displays all the password requirements that apply to your account.
- Are easy for you to remember but difficult for others to guess. One way to create a password is to base it on a song title, affirmation, or other phrase. For example, the phrase might be: *"This May Be One Way To Remember"* and the password could be: **TmBas1w2R!** or a variation.

  When you reset your password, the reset screen lists each requirement and indicates whether your new password satisfies it. All requirements must be met before the password change can be completed.

Securing Your Password

Do not use the same password for your SISOnline account as you do for other unrelated applications (e.g., personal e-mail, social media, banking, etc.). All passwords should be treated as sensitive, confidential information. Remember not to:

- Reveal your password over the phone or discuss it in front of others.

- Send it in an e-mail or store it in an unsecured location in your office.
- Hint at the format of a password (e.g., "my family name").
- Use the "Remember Password" feature of unrelated applications to store your SISOnline password.

By signing in to SISOnline, you acknowledge that access is limited to authorized users,and that system activity may be monitored in accordance with your organization's policies.

Reset Your Password

If you forget your password, select **Forgot Password** on the login page. You will be prompted to enter your **Username**. Click **Continue**.

If the account exists and password reset is enabled for your enterprise, a reset link will be sent to the e-mail address on file for that account. For security, the system displays a general confirmation message to see whether the username was found.

You must have a current e-mail address in your user account details to receive the reset link. If you are unsure whether your e-mail address is current or correct, contact the SISOnline Help Desk or your system administrator, or update your profile after signing in (see Part One, Section D).

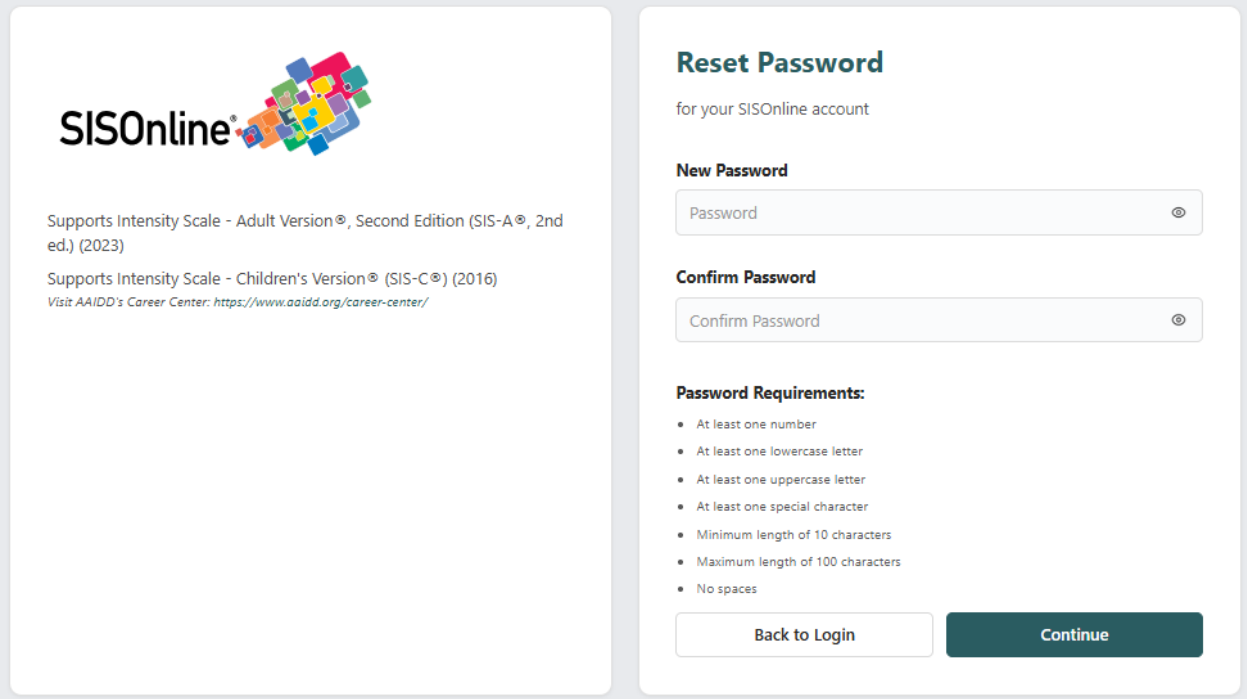
Open the link in the e-mail to navigate to the **Reset Password** screen. The link is valid for a limited time configured by your enterprise. If the link has expired or is incomplete, request a new reset from the login page.

On the Reset Password screen:

1. Enter your **New Password**.
2. Enter the same password again in **Confirm Password**.
3. Review the **Password Requirements** list on the screen.
4. Click **Continue** (or the primary action button shown) to complete the reset.

Once you have successfully changed your password, return to the login page and sign in with your new credentials. You will not be able to reuse previous passwords if your enterprise policy prohibits it.

After signing in, you may also change your password at any time by selecting **Reset Password** from the **account menu** (profile icon) at the top of the application.



Account Lockout

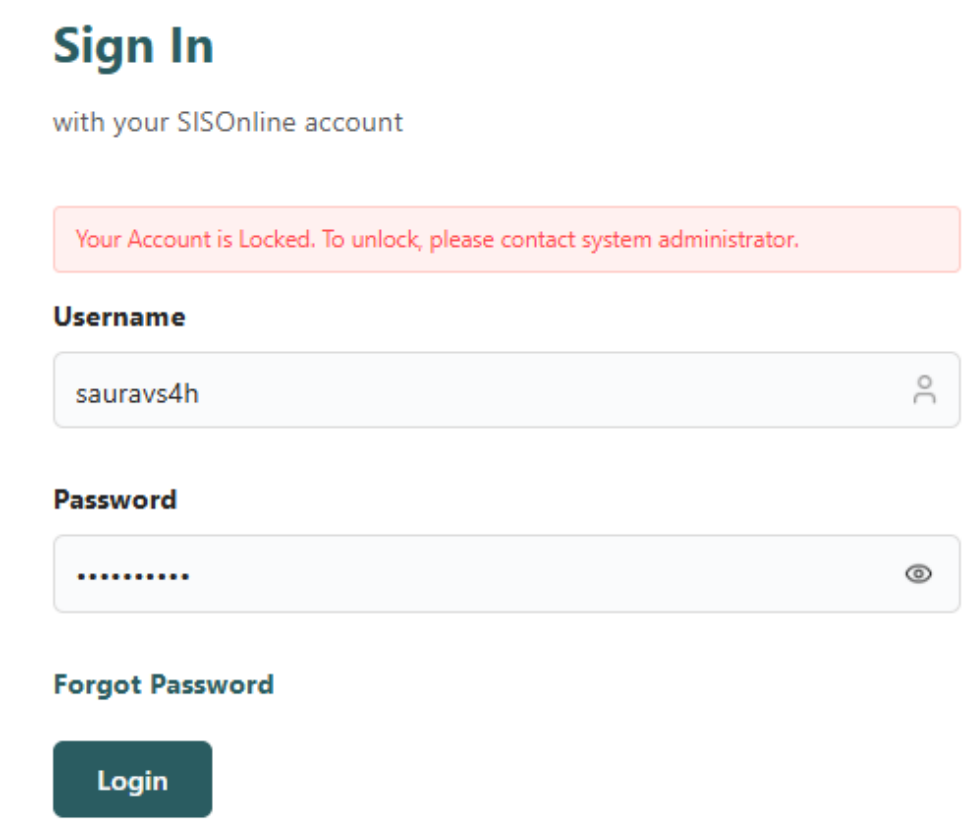
After consecutive failed login attempts, your user account may be **locked**. The number of attempts permitted before lockout is configured by your **enterprise** and may differ from the default system setting.

When you enter an incorrect password, the sign-in page may indicate how many login attempts you have **remaining** before your account is locked. Pay attention to these messages.

If your account becomes locked, you will see a message indicating that the account is locked and that you must contact a **system administrator** to unlock it. Contact your supervisor, your enterprise administrator, or the SISOnline Help Desk for assistance.

The failed-login counter is reset upon a **successful** login.

Your enterprise may have a customized configuration for the number of failed attempts before lockout. If you are unsure what your enterprise settings are, contact the SISOnline Help Desk.



Dashboard and Search SIS Records

After logging in, you will see the **Dashboard Overview** page. The Dashboard provides a summary of assessment activity and quick access to common tasks. To work with individual assessment records, select **Search SIS Records** from the sidebar. The Search area is your control panel—from here you can locate records, open assessments, run reports, move assignments, and perform other actions according to your permissions.

You may also create a new SIS-A or SIS-C record from the sidebar (**Create SIS-A** or **Create SIS-C**), depending on what your State is using and what permissions you have been granted.

Dashboard Overview

The **Dashboard Overview** page appears after a successful login. It may display:

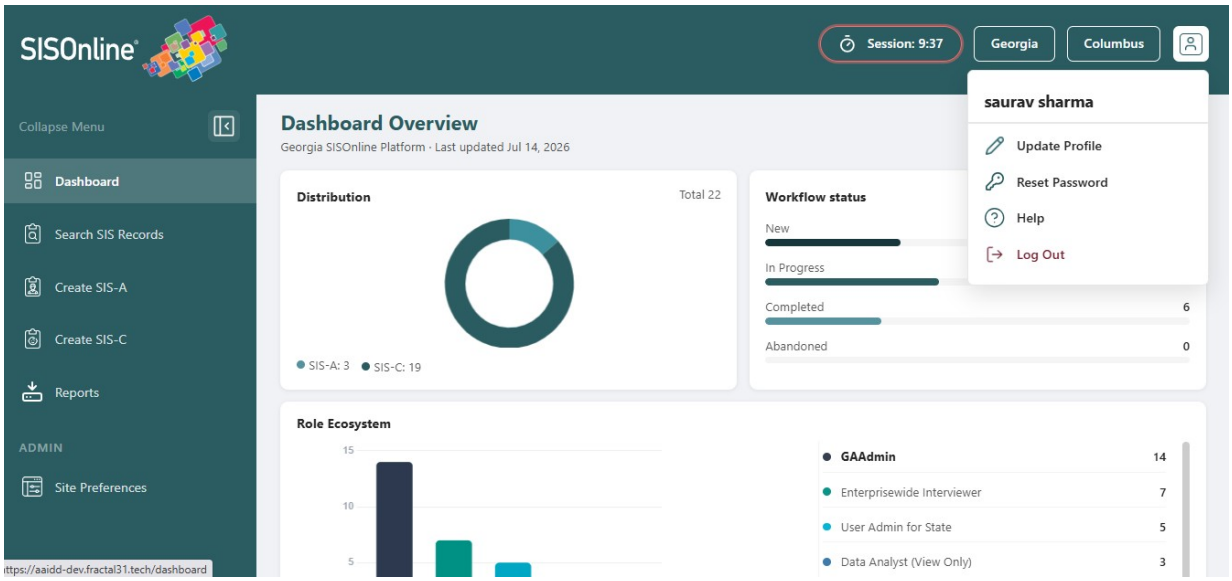
- A welcome message and platform summary.
- **Assessment metrics** such as counts of new, in-progress, and completed records (when your account has permission to view dashboard statistics).

- **User metrics** and other summary information configured for your enterprise.
- A **Refresh** button to reload dashboard data.

Site, enterprise, or group **announcement banners** may appear at the top of the application when you are signed in. Read these messages for important notices from your administrator.

From the Dashboard, use the **sidebar** on the left to navigate to **Search SIS Records**, **Create SIS-A**, **Create SIS-C**, **Reports**, and—if you have administrative permissions, **Enterprise**, **Applications**, **Site Preferences**, and other admin areas.

The **top header** displays your signed-in user (profile icon), session information, organization, and active group (when applicable). Use the profile icon to open the account menu for **Update Profile**, **Reset Password**, **Help**, and **Log Out**.



Displaying Records

When you open **Search SIS Records**, the page title shows **Search Results**. Assessment records matching your current search scope are displayed in a grid below the page header.

Selecting your active group

If your user account belongs to **more than one group**, a dialog appears when you open Search SIS Records:

Your user has multiple group permission sets; please select the set you would like to use.

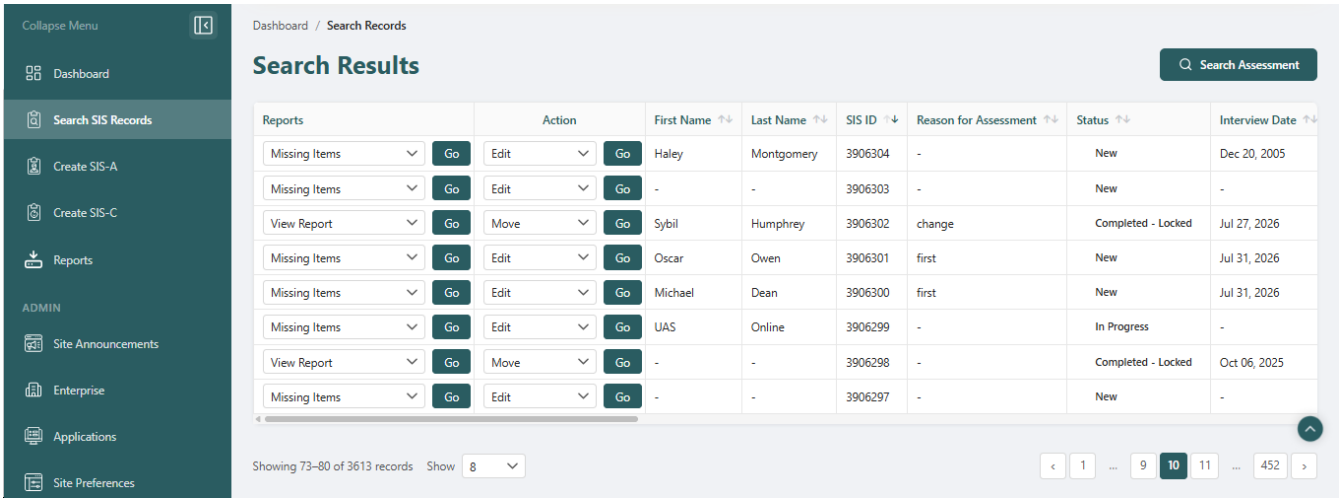
Select the appropriate **Group** from the dropdown and click **OK**. The search results that follow are scoped to the group permission set you selected. You may switch groups later from the account area when your organization allows it.

If you belong to only one group, this dialog does not appear, and search results load automatically.

Default search results

When you first open Search SIS Records (after any required group selection), the system runs a **default search** and displays matching records in the results grid. You do not need to open the search filters first to see records.

Use the **Search Assessment** button at the top of the page to open the search filter panel and refine your criteria (see Sections 3 and 4 below).



Search Options

The Search SIS Records page is organized as follows:

- **Breadcrumb trail** at the top (for example, Dashboard → Search Records) helps you see where you are in the application.
- **Page title — Search Results**.
- **Search Assessment** button — opens the search filter panel (drawer) where you enter or change search criteria.
- **Results grid** — lists assessment records with sortable column headers.
- **Pagination bar** at the bottom — shows how many records are displayed and lets you change pages or the number of records per page.

Application header and sidebar

Across the application (including Search SIS Records), the layout includes:

- **Sidebar navigation** — Dashboard, Search SIS Records, Create SIS-A, Create SIS-C, Reports, and administrative links (when permitted).
- **Collapse Menu** control — collapses or expands the sidebar to show icons only.
- **Profile menu** (top right) Update Profile, Reset Password, Help, Log Out.

- **Session timer**, **organization**, and **active group** labels may appear in the header when applicable.

Sorting results

Click a **column header** in the results grid to sort by that column. Click again to reverse the sort direction. By default, results are sorted with the highest **SIS ID** first (newest assessments toward the top of the list).

Pagination

Use the pagination controls at the bottom of the grid to move between pages. You may change how many records appear per page (for example, 8, 16, 24, or 50). The default is **8 records per page**.

Search Assessment

Click **Search Assessment** on the Search Results page to open the **Search Assessment** filter panel. This panel replaces the legacy "advanced search" area that appeared at the bottom of the old search page. All filter options are now grouped in this panel.

The panel title is **Search Assessment** with the section heading **Search Filters**.

Name and identifier fields

- **First Name**, **Last Name**, and **Age** — search for records by client name or age.
- **SIS IDs** — enter one SIS ID per line to search for multiple records.
- **Tracking Numbers** — enter one tracking number per line.
- Additional bulk identifier fields (such as **Client GUIDs** or **Support Coordinators**) may appear depending on your enterprise configuration.

  An instruction line reminds you that you may search for multiple records by entering SIS IDs, tracking numbers, or UIDs in a single column (one per line).

Groups, enterprise, and assignment

- **Groups** — limit results to a selected group.
- **Enterprise** — limit results to a selected enterprise (available when your account has access to multiple enterprises).
- **Interviewer Username** — filter by interviewer.
- **Assigned User Id** — filter by assigned user.

Date ranges

Date filter sections may include:

- **Date / Time Updated** (date and time format: MM/DD/YYYY HH:MM).
- **Interview Date Range** (date format: MM/DD/YYYY).

- **Date Request Received**.
- **Interview Due Date Range** (when configured for your enterprise).

  Shortcut buttons such as **Last Month**, **Last Quarter**, **Year to Date**, and similar presets help you set common date ranges quickly.

Forms, level of completion, and review status

Checkbox groups let you refine your search:

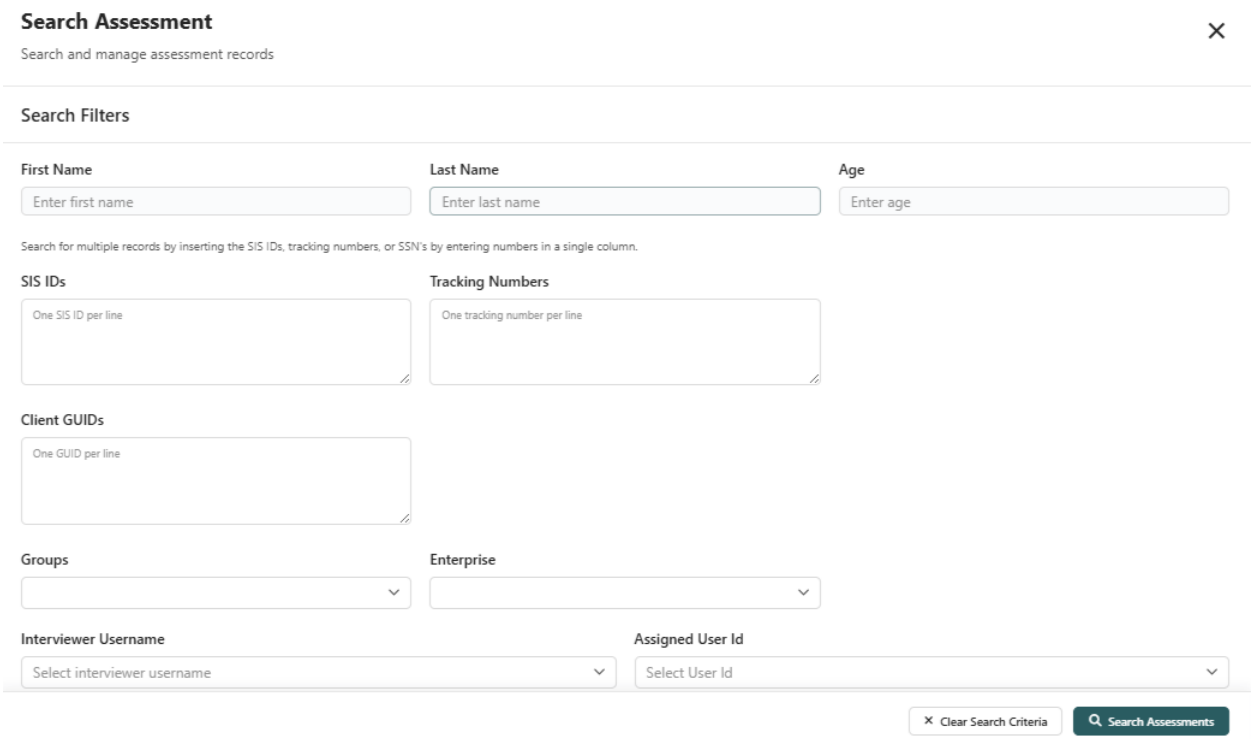
- **Forms** — for example, Adult 2nd Edition, Child.
- **Level of Completion** — Completed, New, In Progress, Abandoned.
- **QA Review Status** — Blank, To Be Reviewed, Reviewed, Approved, Scheduled, Tentatively Scheduled, To Be Scheduled, Rescheduled, On Hold, Declined, Pre-QA, Cancelled, and other statuses configured for your enterprise.
- **Typically, Hidden Records** — Deleted, Archived, Training, Shared.

  An additional option such as **No Billing Information** may appear when configured.

Running and clearing a search

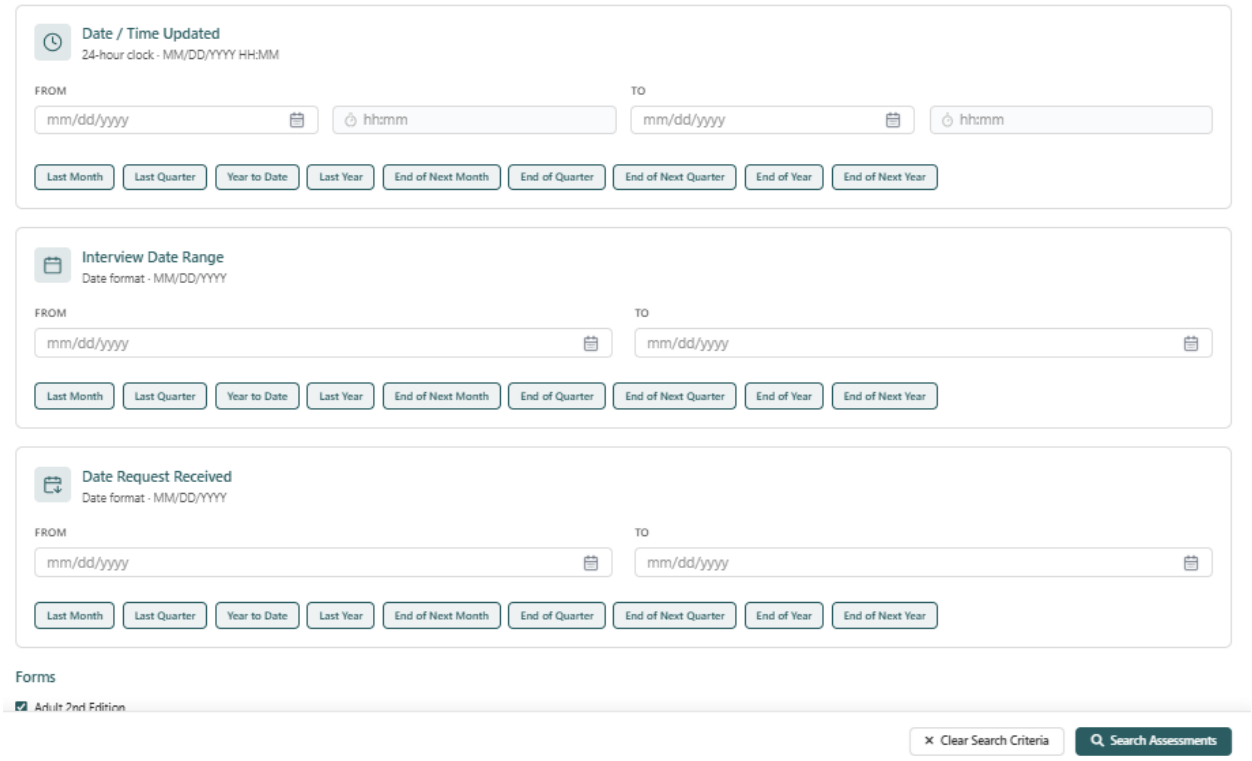
- Click **Search Assessments** to run the search with your selected criteria.
- Click **Clear Search** or **Clear Search Criteria** to reset the filters and start a new search.

  The results grid updates to show records that match your criteria.



Please contact the SISOnline Help Desk if you have questions while using SISOnline

Monday - Friday, 9am– 5pm. (Eastern) at help@sis-online.org



Search Results Grid and Actions

The results grid displays one row per assessment record. Column headers help you identify each record. Commonly displayed columns include:

- **Reports** and **Action** (see below).
- **First Name**, **Last Name**.
- **SIS ID** and **Tracking #** — often used to find a specific record.
- **Status** (level of completion).
- **Interview Date**, **Date of Birth**, **Age**.
- **Interviewer Login ID**, **Assigned**, **Reviewed Status**.
- **Group**, **Form**, and other fields depending on your enterprise layout.

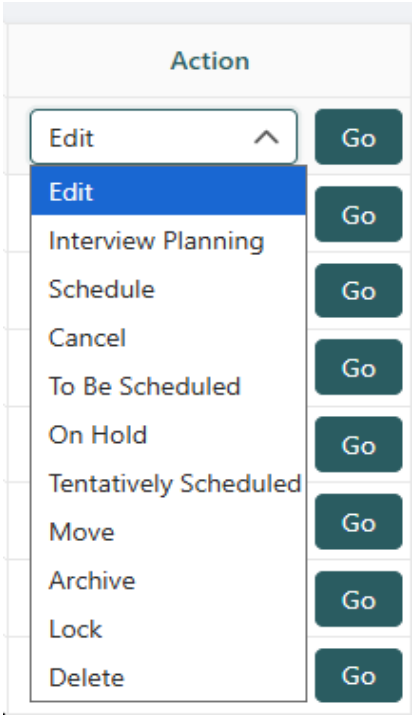
Each record is identified in several ways. The **SIS ID** and **Tracking #**, for example, are frequently used to locate a specific assessment.

Action column

The **Action** column contains a dropdown list of actions available for that record, followed by a **Go** button. Available actions depend on the record's status, your permissions, and your enterprise configuration. Actions you do not have permission to use will not appear.

Common actions include:

- **Edit** — open the assessment record and enter or change data. States may configure records to lock automatically after a period of time. Records that remain incomplete for an extended period may also be locked or marked abandoned according to enterprise rules.
- **Interview Planning** — open the interview planning page for the assessment.
- **Schedule** — set the review status to Scheduled (requires edit and move permissions).
- **Cancel** — set the review status to Cancelled. Specific search criteria must be selected to return cancelled records in the results.
- **To Be Scheduled** — set the review status to To Be Scheduled.
- **Move** — reassign the assessment to a different group and/or user (requires move permission). See Part One, Section E.
- **Archive** / **Un-Archive** — archive or restore a record,so it is hidden from normal search results unless Archived is selected in search criteria.
- **Lock** / **Unlock** — manually lock or unlock a record from editing (when permitted).
- **Delete** / **Un-Delete** — mark a record as deleted or restore it. Deleted records can be found by selecting **Deleted** under Typically Hidden Records in the search filters. Delete is visible only with delete permission.
- **Refresh Fields in Record** — update search grid data for the record when displayed values appear out of date.



To perform an action:

1. Select the action from the **Action** dropdown for the row.
2. Click **Go**.

Some actions (such as **Move**) open a dedicated page. Others run immediately or open the assessment in the editor.

Reports column

The **Reports** column contains a dropdown of report options for the record, followed by a **Go** button. Report options may include:

- **View Report** — open or print the assessment report.
- **View Spanish Report** — open the Spanish version when available.
- **Missing Items** — show validation items still required.
- **Access Logs** — export access log information (when permitted).

Select the report type and click **Go** to run the selected report action.

Creating new assessment records

To create a new record, use the sidebar links **Create SIS-A** or **Create SIS-C** (depending on your access). A new assessment record is created and opened for data entry. This replaces the legacy "create new record" link that appeared below the search grid.

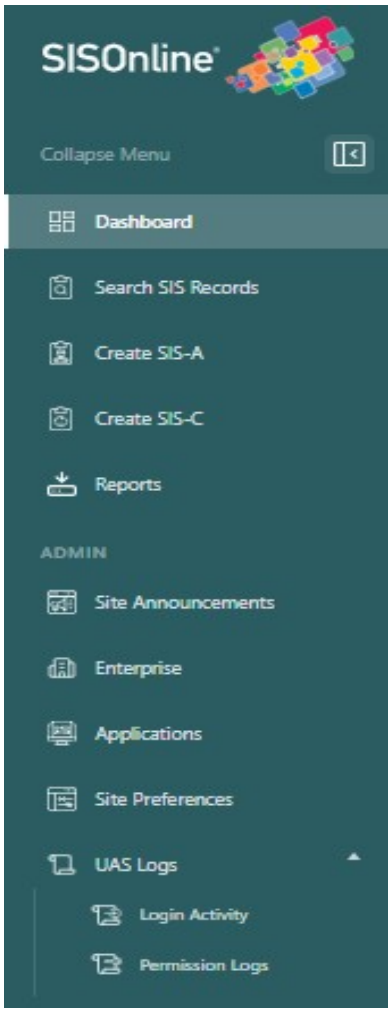
Venture and search results

Records that are in **New** status and **assigned to you** are downloaded to SIS Venture when you next sign in to Venture. Use the Search SIS Records grid to confirm assignment and status before conducting an interview in Venture. See **Part Two: SIS Venture** for download, interview, validation, and upload procedures.

Application Navigation

When you are signed in to SISOnline, you move around the site by using the **sidebar**, the **profile (account) menu**, and—when an assessment record is open—the **form section stepper** and **Quick Action** menu. These replace the older top "menu bar," side-panel icons, and magnifying-glass / question-mark controls described in previous versions of this guide.

You will use these areas often. Mentions of Help point to the Help page, which includes this user's guide and other documents.



The Sidebar

The **sidebar** appears on the left side of every main page in the SISOnline web application (Dashboard, Search SIS Records, assessment forms, Reports, and administrative pages).

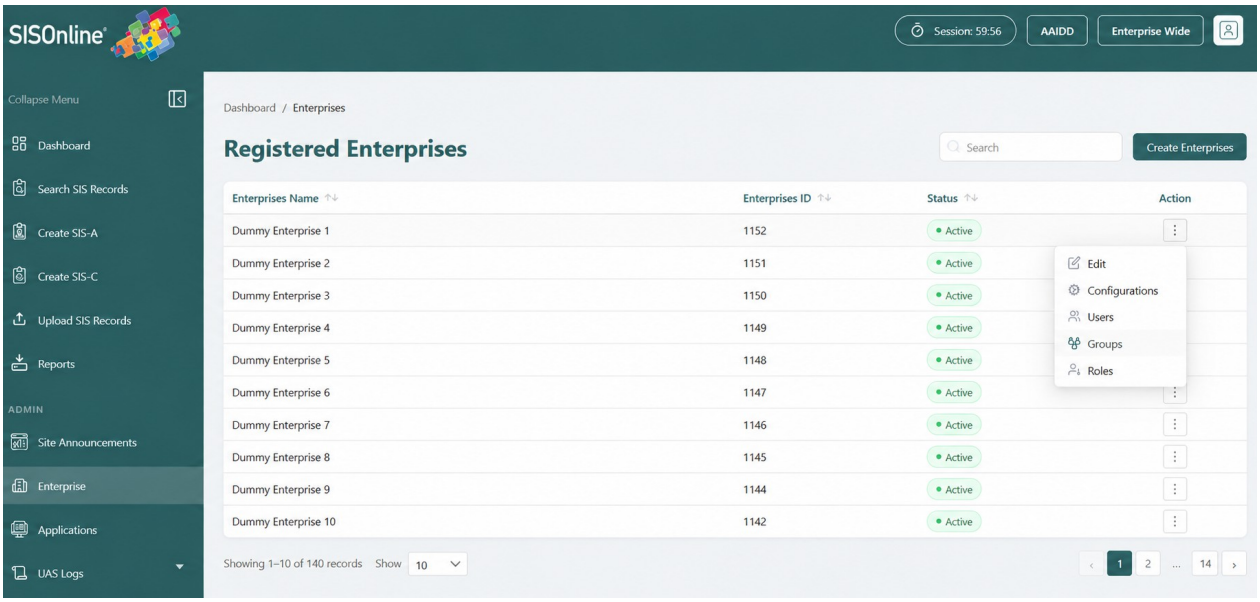
Primary navigation links (shown when you have the required permissions) include:

- **Dashboard** — return to the Dashboard Overview.
- **Search SIS Records** — open the search results grid and search filters.
- **Create SIS-A** — create a new SIS-A assessment (when permitted).

- **Create SIS-C** — create a new SIS-C assessment (when permitted).
- **Reports** — open the Reports area for your enterprise (when the SISOnline application is available to your account).

An **ADMIN** section may appear below the primary links when your permissions allow. Typical admin links include:

- **Site Announcements**
- **Enterprise** — this is the main path for state and enterprise administrators into the **User Administration System (UAS)**. Select **Enterprise** to open the **Registered Enterprises** list. On the row for your enterprise, click the vertical ⋯ (three-dot) action button. A menu opens with the UAS options available to your account—typically **Users**, **Groups**, and **Roles** (and, when permitted, **Edit** or **Configurations**). From that menu, administrators can:
    - Add, update, or deactivate **users**
    - Add or manage **groups**
    - Adjust **default roles** and role definitions
    - Set or change **user permissions** (application, group, and individual rights)



- **Applications**
- **Site Preferences**
- **UAS Logs** (for example, Login Activity and Permission Logs), when you have super-access permission

Links you do not have permission to use do not appear.

Please contact the SISOnline Help Desk if you have questions while using SISOnline

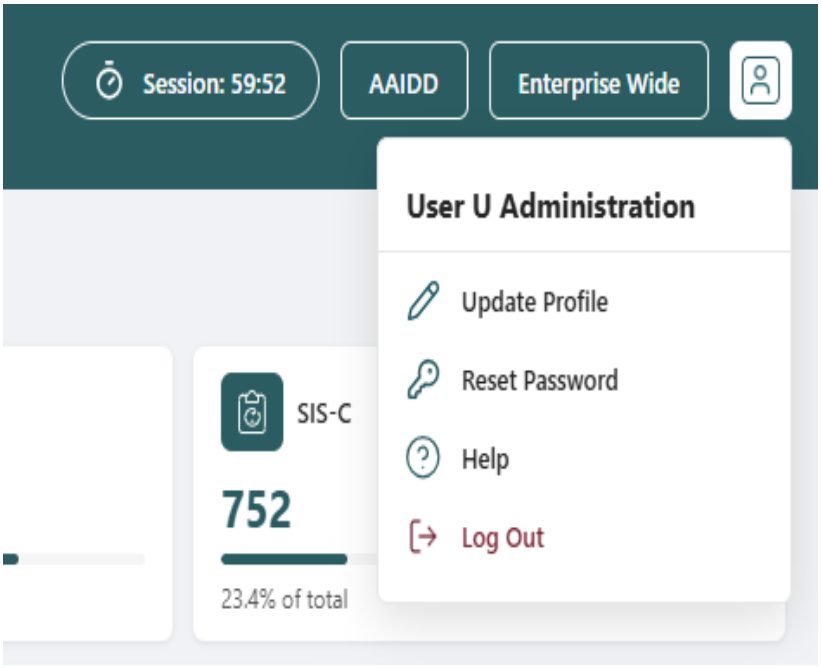
Monday - Friday, 9am– 5pm. (Eastern) at help@sis-online.org

Use **Collapse Menu** (near the top of the sidebar) to collapse the sidebar to icons only or expand it again to show labels. Collapsing the menu can give more width to search grids and assessment forms on smaller screens.

The SISOnline logo in the top chrome identifies the application. Clicking primary sidebar items moves you between major areas of the system without using the browser Back button for those destinations.

The Profile Menu

The **profile menu** is opened from the **user icon** in the top-right header of the application. The header may also show:



- Your **session** time remaining
- Your **organization** (enterprise) name
- Your **active group** name (when applicable)

Click the profile icon to open the account menu. The menu displays your display name and typically includes:

- **Update Profile** — edit your contact and profile information so it can be transferred into assessment records you create (see Part One, Section D).
- **Reset Password** — change your password while signed in.
- **Help** — open the Help page, which lists PDF resources (including Guidelines for Interviewers and this **SISOnline User Guide**) and Help Desk contact information.
- **Log Out** — end your session and return to the sign-in page.

To leave SISOnline securely when you are finished working, always use **Log Out** from the profile menu rather than only closing the browser window.

Navigation Within an Assessment

When you open a SIS-A or SIS-C assessment for editing, the assessment workspace uses the same application sidebar and profile menu and adds controls specific to the record.

Assessment record header

Near the top of the assessment workspace, a **record header** shows identifying information for the open assessment, such as:

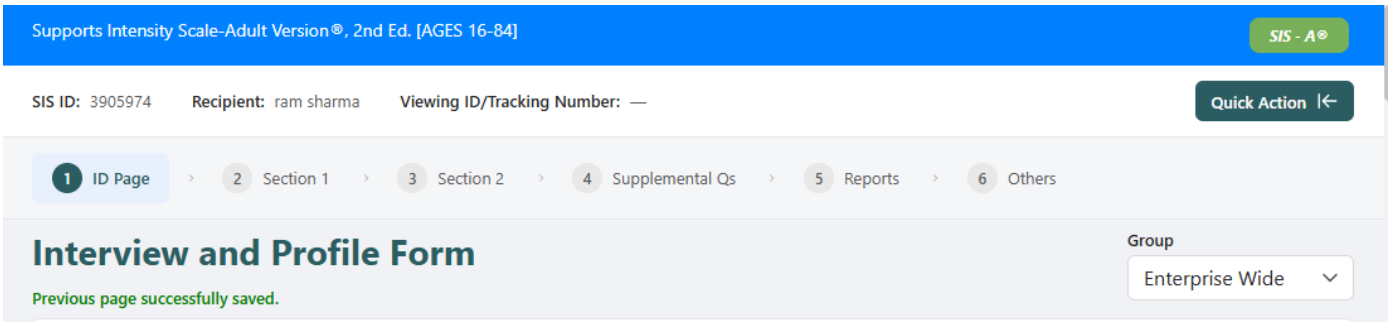
- **SIS ID**
- **Recipient**
- **Viewing ID / Tracking Number**

Use this header to confirm that you are working on the correct record before entering interview data.

Form section stepper

Below the record header (or as part of the assessment chrome), the **form section stepper** lists the major parts of the assessment. This replaces the older top menu bar inside a record. Typical steps for SIS-A and SIS-C include:

1. **ID Page** — Interview and Profile Form; Profile Screen 2
2. **Section 1** — Section 1A; Section 1B
3. **Section 2** — Section 2A through Section 2G (labels may vary slightly by edition)
4. **Supplemental Qs** — Supplemental Questions
5. **Reports** — Validation; Custom Report; Scores
6. **Others** — Interview Planning Information; Post Interview Information



Click a **step** to move to that part of the record. For steps that have multiple pages, hover or tap the step to open a **submenu**, then choose the specific page (for example, Section 1A or Interview Planning Information).

The stepper helps you move from one part of a record to another without returning to Search SIS Records.

Quick Action menu

In the assessment header, click **Quick Action** to open a menu of frequent actions. Depending on your place in the form, options may include:

- **Save & Next Section** — save the current page and move forward to the next section or page.
- **Save & Previous Section** — save the current page and move back to the previous section or page (when available).
- **Search SIS Records** — leave the assessment and return to the search results area.

- **Cancel / No Save** — leave without saving changes from the current action (use carefully).

Use **Save & Next Section** / **Save & Previous Section** when you want to save and move in one step. Page footers on many assessment screens also provide **Save & Next** and **Save & Previous** buttons with the same purpose.

Saving while you work

IMPORTANT: Assessment data is saved when you move to another page within the record using the stepper, the Quick Action save-and-navigate options, or the **Save & Next** / **Save & Previous** footer controls. Do not rely on the browser Back button to save. If you stop mid-interview for discussion or need to switch tasks, use a save-and-navigate control, or complete the current page save before leaving the record.

When you use **Log Out**, ensure that recent work has been saved by navigating with Save & Next / Save & Previous, or by using the save actions available on the page, before you sign out.

Returning to Search SIS Records

To return from an open assessment to the search results grid:

- Select **Search SIS Records** from the Quick Action menu, **or**
- Select **Search SIS Records** from the application sidebar.

Do not use **Cancel / No Save** if you intend to keep unsaved edits on the current page—save first, then return to search.

User Preferences

User preferences help you control how SISOnline displays information for your account, keep your contact profile current, and change your password. In the current system, these options are reached from the **sidebar** (Site Preferences) and the **profile menu** (Update Profile and Reset Password), rather than from links on the search page as in older versions of SISOnline.

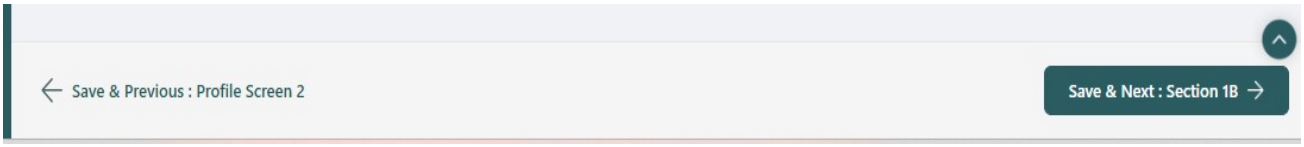
Be sure to keep your **profile information** up to date. When you create an assessment record and select your name from the interviewer pull-down on the Interview and Profile Form, this information can flow into the record automatically.

Options available to you include:

1. Change how many assessment records are shown at a time on search and related grids (**Site Preferences**).
2. Change your password (**Reset Password** from the profile menu).
3. Update your user information (**Update Profile** from the profile menu).

Saving Assessment Data

IMPORTANT! Assessment data is saved when you move to another page within the record using the form section stepper, the **Quick Action** options **Save & Next Section** / **Save & Previous Section**, or the **Save & Next** / **Save & Previous** buttons at the bottom of assessment pages.



On many assessment screens, the system may also **auto-save** periodically while you work. When an auto-save is completed successfully, a message may appear such as *SIS ID: [number] auto-saved successfully.* Continue working after the message disappears.

Data is not saved if you choose **Cancel / No Save** or if you leave the page without using a save action. Before you select **Log Out** from the profile menu, confirm that recent work has been saved.

When you use SIS **Venture**, follow the save and upload steps described in **Part Two**. Venture is designed to save as you change pages offline; completed interviews should still be uploaded to SISOnline when you have internet access.

Site Preferences

Site Preferences allow you to adjust display settings for your account.

How to open Site Preferences

- Sign in to SISOnline.
- In the left sidebar, under ADMIN, select Site Preferences (the link appears when you have access to SISOnline preferences for your account).
- The Site Preferences page opens.

Update Profile

The information you enter in your profile can transfer onto assessment records you create later in SISOnline or Venture. Keep e-mail and phone current so the Help Desk and your administrators can reach you if needed.

How to open Update Profile

1. Click the **profile icon** in the top-right header.
2. Select **Update Profile**.
3. The **Update User Info** page opens.

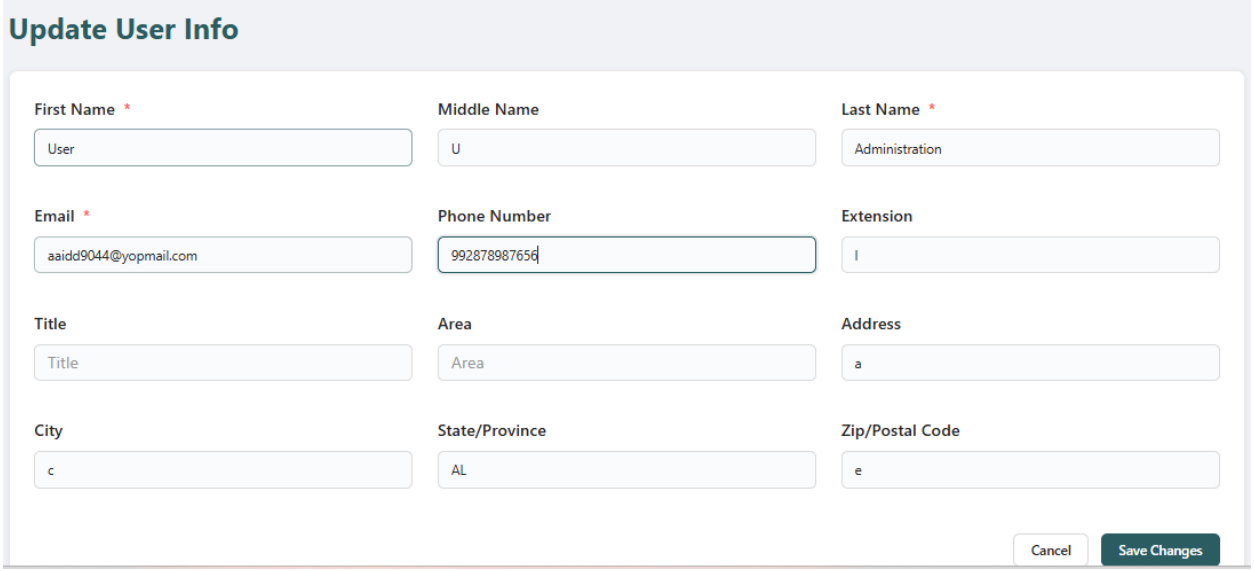
Fields you may update

Typical fields include:

- **First Name**, **Middle Name**, **Last Name** (first and last name are required)
- **Email** (required)
- **Phone Number** and **Extension**
- **Title** and **Area**
- **Address**, **City**, **State/Province**, **Zip/Postal Code**

Complete or correct the fields as needed, then save using the primary action button on the page (for example, **Save** or **Update**). Use **Cancel** if you do not wish to keep your changes.

After saving your profile, when you create a new assessment and select your interviewer's login on the Interview and Profile Form, your updated contact and profile details can populate related fields on the record.



Change Password (while signed in)

If you need to change your password while you are already signed in:

1. Open the **profile menu**.
2. Select **Reset Password**.
3. On the **Reset Password** page, enter your **Current Password**, then your **New Password**, then **Confirm Password**.
4. Follow any **Password Requirements** shown on the page.
5. Submit the form to update your credentials.

You may also reset a forgotten password from the sign-in page using **Forgot Password** (see Part One, Section A). Use the profile menu path above when you know your current password and want to update it yourself.

The Assessment Record Information

Level of Completion – Record Status

On **Search Results**, the **Status** column shows form (completion) status. **Reviewed Status** shows QA / scheduling status.

Form status:

Status	Meaning
New	Mostly ID / demographic data only
In Progress	Some ratings entered; not all required ratings complete
Completed	Required ratings entered; may still be unlocked
Abandoned	Incomplete too long (enterprise rules); usually locked

Enterprises can lock completed records after a set number of days. Locked records need unlock / edit-locked permission to edit. Status stays **Completed** when locked.

Review status (set from the **Action** dropdown + **Go**, unless automatic)

- **To Be Scheduled / Scheduled / Rescheduled / Cancelled / On Hold / Tentatively Scheduled / Declined** — set manually when permitted.
- **Scheduled** may also be set automatically when an interview date is entered (rules vary; if status is already e.g. To Be Scheduled, you may need to set Scheduled manually).
- **To Be Reviewed** — often set when the record becomes Completed.
- **Reviewed / Approved** — QA actions (permission / enterprise config required).
- **Checked Out / Checked In** — Venture download / upload.

Typically hidden (find via search filters)

- **Deleted / Archived / Training / Shared** — use **Typically Hidden Records** in Search Assessment filters.

  Time limits (complete within about 3 weeks; edit completed records for about 2 weeks) are set by your enterprise. Ask your administrator if you are unsure.

Assigning or Moving Records

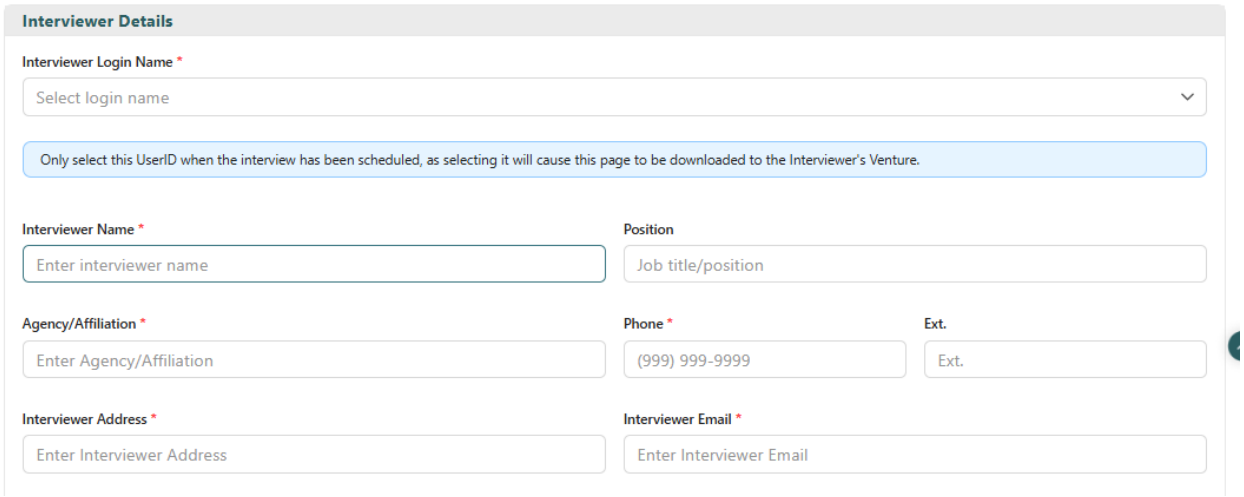
Assign (New records): On the Interview and Profile Form, choose the interviewer. Assigned **New** records download to that user's Venture on next Venture login.

Move (reassign): Requires **Move** permission.

1. On Search Results, select **Move** in **Action** → **Go**.
2. On **Update User Info** (Move page), choose **Group** and **Assigned User**. **Enterprise** appears only for AAIDD / UAS users.
3. Click **Submit**, then **Confirm**.
4. Success message: assessment moved.

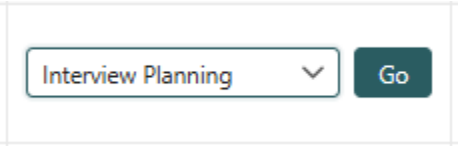
   Move changes to whom the record is **assigned**—not the interviewer field on the form. If the assignee loses group access, they may no longer see the record.

   (Bulk move: include only if your enterprise still offers it; ask Help Desk if unsure)



Interview Planning and Post Interview

Interview Planning — Action → Interview Planning, or in the open record: stepper **Others** → **Interview Planning Information**. Schedulers add planning data; it downloads to Venture.



Typical fields: Interview Date, Start / End Time, Interviewer, location, and notes. Respondent notes may be added where the form provides them (saved notes are often read-only after save).

Post Interview — stepper **Others** → **Post Interview Information**. Some states require this before Venture upload.

Transfer Profile Information to Records

Keep your profile current (**Profile menu** → **Update Profile**). When you create a record and select your interviewer login on the ID page, profile details can fill out related interviewer fields. Change password via **Reset Password** in the same menu.

Creating New Records

1. Sidebar → **Create SIS-A** or **Create SIS-C** (permission required).
2. Complete **Interview and Profile Form**. Required fields must be filled before continuing.
3. Select your **Interviewer** login to populate interviewer info.
4. Continue sections or leave status **New** for Venture download.
5. Venture users: after assign / save as New, sign in to Venture to download (see Part Two). You can also create some records in Venture if your install allows.

   Online-only: save, return later via Search → **Edit** → **Go**.

Secure Emails – Invitations and Reminders (Optional)

If enabled for your enterprise: Interview Planning may offer e-mail templates (including Ad Hoc), recipient addresses, optional calendar attachment, and automated reminders. E-mails are encrypted. Cancelling a scheduled assessment may cancel related automated notices.

Upload Assessment Template (Optional)

If enabled and permitted (**Create** / **Edit** as needed): fill in the Excel template (SIS-A or SIS-C separately), leave SIS_ID blank for new rows, include interviewer login and ID, then upload from the Upload Assessment Data area when available. Ask your supervisor or Help Desk if you do not see this option—do not document steps you cannot see in your environment.

Using the Assessment Record

New = no ratings yet. Any rating → **In Progress**. Pages save when you move with **Save & Next** / stepper / Quick Action (see Section D).

Use the **form section stepper** to see where you are in the interview.

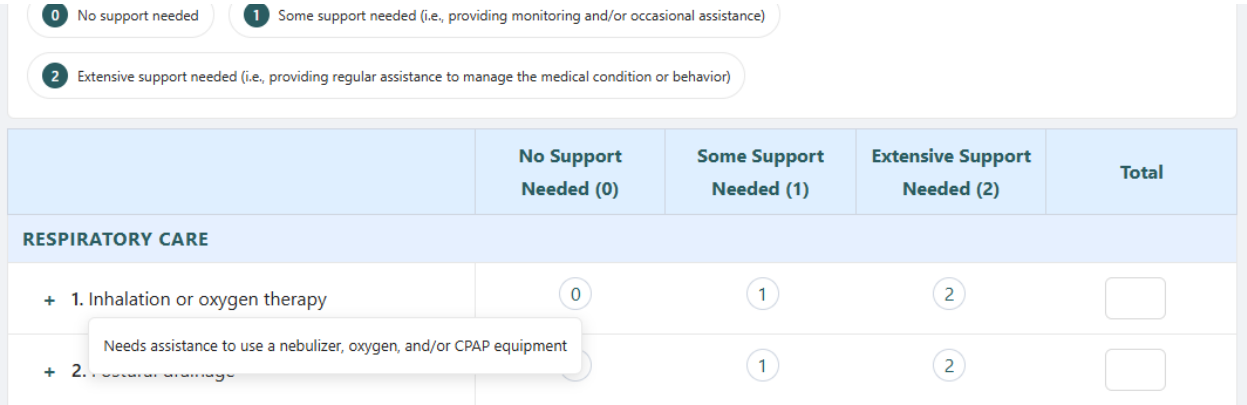
General Information

Entering ratings

- Click a rating number or type in the box and Tab to the next item.
- You may leave items unfinished and return them later.
- Validation runs when you leave a page. Fix errors at the top before continuing (examples: Frequency > 0 cannot have Daily Support Time / Type of Support zero; all three of Frequency / Daily Support Time / Type of Support must be answered together when used).

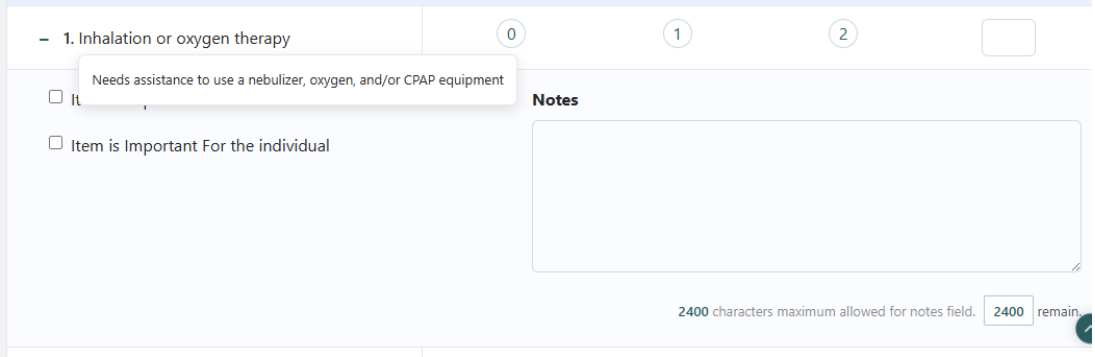
Clarifying questions (tooltips)

Hover (or focus) on the item for clarification of text. Same idea as the older "tool tip" help.



Notes

- **Item notes:** expand the item row (+). Flag **Important To** / **Important For** if needed; add the note; save with the page.
- **Section notes:** text area on the page for notes not tied to one item.
- Notes can appear in reports used for planning.



Find / edit later

Search SIS Records → **Edit** → **Go**. Sort column headers or use Search Assessment filters if the list is long.

2. Quality Review (QA)

Some enterprises leave Review Status blank when no review is required. Others review every completed record.

Typical QA flow (needs **Edit Locked** / approve permissions as configured):

1. Record completes → often **To Be Reviewed**.
2. Action → **Review** → **Go** — may lock the record, set review in progress, and keep a **Pre-QA** copy.
3. After QA edits, Action → **Approve** (if configured).

Find Pre-QA / review statuses with Search Assessment filters (QA Review Status, Typically Hidden).

3. Attachments

The new Search Results grid does **not** show an Attachments column by default (legacy did). If your enterprise enables attachments elsewhere in the release you use, upload / download / delete follow those screens; **View Only** users usually download only. Ask Help Desk if you need attachments and do not see them.

4. Scheduling Review Statuses

From Search Results **Action** + **Go** (edit + move permissions as required):

Action	Typical result
To Be Scheduled	Review status = To Be Scheduled
Schedule	Scheduled

Rescheduled	Rescheduled
Cancel	Cancelled (filter search to find cancelled rows)

- Future **Interview Date** on a blank/New record may auto-set **Scheduled**.
- Venture can download New records that are to-be-scheduled / scheduled / rescheduled.
- Status changes often update the planning **scheduling log**.

Accessing Reports

Reports open after an interview is complete (and validated where required). Scores are generated from the saved assessment data.

Two paths

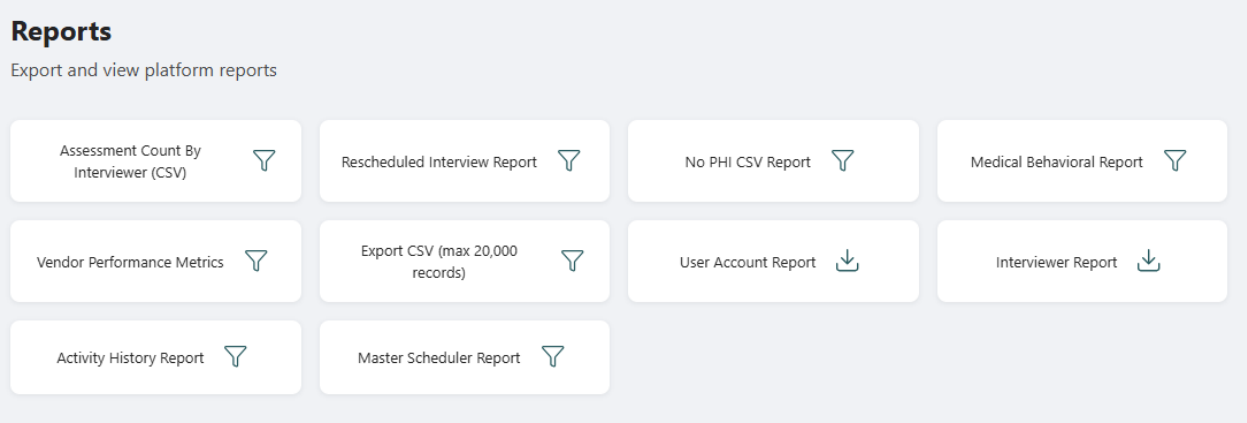
1. **Search Results — Reports** column → choose option → **Go** (e.g. View Report, View Spanish Report, Missing Items, Access Logs).
2. **Open record —** form stepper → **Reports** (Validation, Summary, Scores).

   PDF reports may print with enterprise default options. **View Report** = English; **View Spanish Report** = Spanish when available.

1. CSV / Admin Reports (Sidebar → Reports)

Open **Reports** from the sidebar (permission-gated). Cards you may see (exact list depends on your grants):

- Assessment Count By Interviewer (CSV)
- Rescheduled Interview Report
- No PHI CSV Report
- Medical Behavioral Report
- Vendor Performance Metrics
- **Export CSV** (max 20,000 records)
- User Account Report
- Interviewer Report
- Activity History / Master Scheduler



Export CSV (typical steps)

1. Open the report card (filter icon when criteria are required).
2. Set filters as needed; choose assessment form (SIS-A / SIS-C as offered).
3. For Export CSV, select **parts to include**, then run the search/export action.
4. Download opens in Excel/spreadsheet. Save and close before running another large export.

*(Legacy "Export CSV" under Administrative Options on the search page is replaced by this **Reports** page.)*

Getting Help

Use this guide first, then your supervisor, then the Help Desk.

SISOnline Help Desk

- **Email:** help@sis-online.org
- **Hours:** Monday–Friday, 9 a.m.–5 p.m. (Eastern)

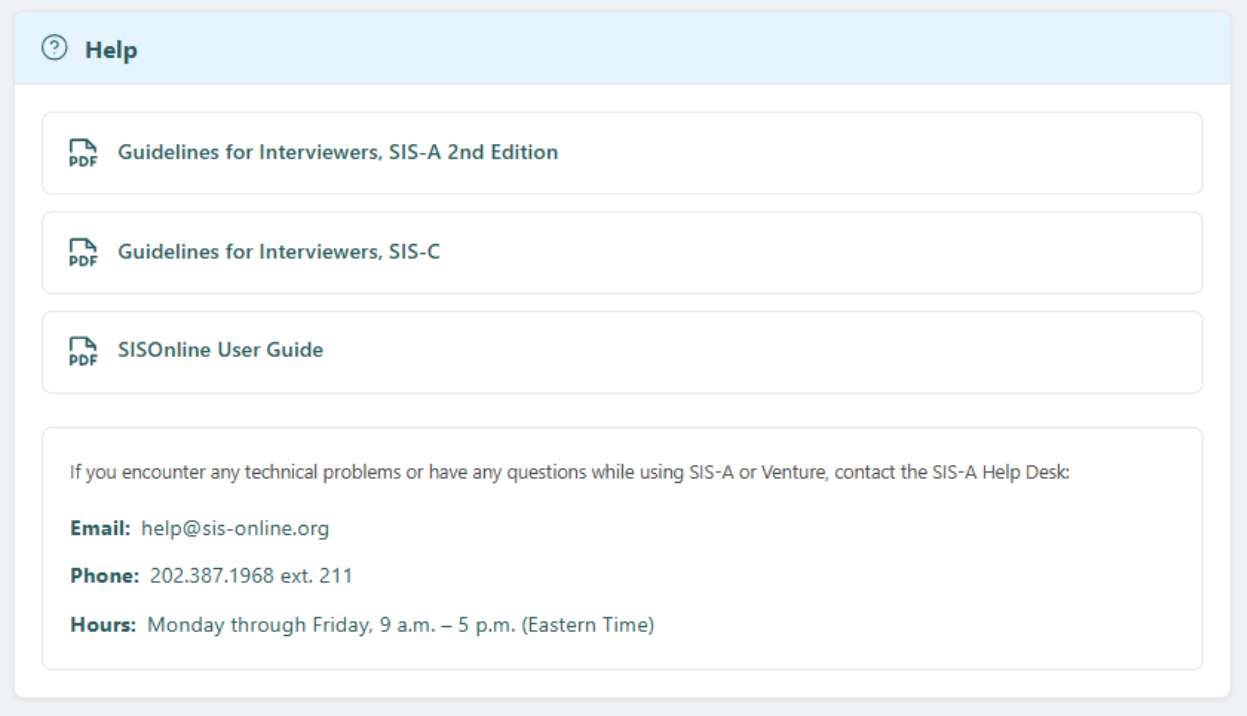
Do **not** put PHI in e-mail. Refer to assessments by **SIS ID** only (or use secure e-mail if your org requires it).

Help Documents on SISOnline

Profile menu → **Help**. PDFs open in a new tab (examples):

- Guidelines for Interviewers, SIS-A 2nd Edition
- Guidelines for Interviewers, SIS-C
- SISOnline User's Guide (this document)

The Help page also lists copyright / publisher notices for Supports Intensity Scale and SISOnline.



Please contact the SISOnline Help Desk if you have questions while using SISOnline

Monday - Friday, 9am– 5pm. (Eastern) at help@sis-online.org

Part Two: SIS Venture

SIS Venture is the Windows desktop module for entering SIS-A / SIS-C ratings **offline**. You upload completed interviews to SISOnline when online again.

VENTURE IS NOT LONG-TERM STORAGE. Upload when the interview is complete. Do not keep finished records only on Venture. If computer experiences hardware failure or other issues, this could result in irrecoverable data loss of assessment(s) that have not yet been uploaded. Upload assessments to SISOnline as often as possible. Edits and proofreading of assessments can then be continued in SISOnline if needed.

Same **username and password** as SISOnline. First login must be **online** so Venture can sync.

A. Security Considerations

Venture holds ePHI. Protect the device as well as the login:

- Use full-disk encryption (e.g. BitLocker).
- Keep the device with you; do not leave it in plain sight.
- Require a device password; do not share it; use separate OS profiles if others use the PC.
- Use strong Venture / SISOnline passwords (8+ characters, complex).

B. Tips to Get Started

1. Be **online** for the first Venture login (sync with SISOnline).
2. Minimize other programs so you can see the desktop.
3. Open the **SIS Venture** icon → enter SISOnline username / password.
4. After first sync, you may log off and reopen **offline** with the same credentials.

C. Using Venture

After login, use the **Venture Options** menu. Assessments download on login when rules allow.

Situation	Behavior
Status **New**, assigned to you	Downloads each Venture login
Website has a value	Overwrites the same field on Venture
Field filled only on Venture	Not replaced by a blank website field
In Progress, never downloaded	Downloads **once** only
In Progress / Completed on Venture **and** on website	Venture copy is **not** re-synced from the website

After download: **Return to assessments** → open **Edit** on the record → work offline. Wait for the busy/spinner to finish before typing or changing pages. Use font size links if available. Close by returning to the Venture search list.

D. Interview Planning and Scheduling

Schedulers enter planning in **SISOnline** (**Others** → Interview Planning). That data downloads with the record and can be viewed in Venture.

Typical fields: Interview Date, Start Time, Interviewer (from ID page). Optional e-mail interviewer / calendar tools apply in SISOnline when your enterprise enables them (see Part One, Section E).

E. Post Interview Summary Notes

Open **Post Interview** with Others (SISOnline) or the equivalent link in Venture. Some states require this before uploading; follow your State rule.

F. Uploading Completed Assessments

1. Validation

In Venture: **Reports** → **Validation**. Fix listed items, then confirm status is **Completed**. You cannot upload incomplete records.

2. Upload (must be online)

1. Venture Options (or Action) → **Upload**.
2. Wait for uploading / SIS ID confirmation.
3. **Return to Assessments**.

4. In SISOnline Search, confirm the record (Completed / Checked In as applicable).

G. Updates and Issues

1. Sync Form Data

Use **Sync Form Data** when the form definition on SISOnline changes, and you need those structure updates in Venture.

2. Retrieving the Venture Database (Help Desk)

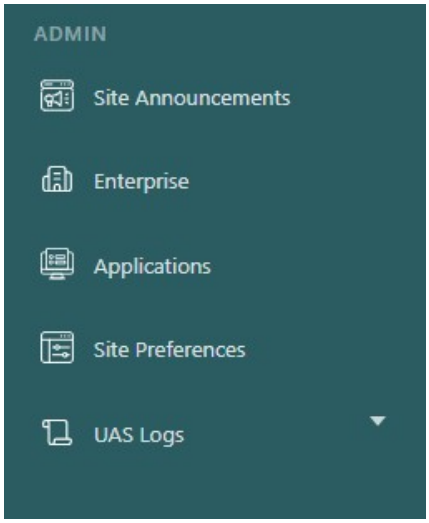
If Help Desk asks for your Venture DB:

1. File Explorer → C:\ → enable **Hidden items** if needed → ProgramData.
2. Open AAIDD\SISVenture\<YourUserName>\AAIDD\Venture.
3. Find folder like X.X.0.0 → Send to → Compressed (zipped) folder.
4. E-mail the zip to **help@sis-online.org** (no extra PHI beyond what they request).

3. Version / OS

Venture is for **Windows** (64-bit). Not for iOS / Android. Surface-class Windows tablets may work; confirm with your admin. Prefer a current supported Windows version (e.g. Windows 11 or newer).

Part Three: The User Administration System (UAS)



UAS manages users, groups, roles, and permissions for SIS-A / SIS-C.

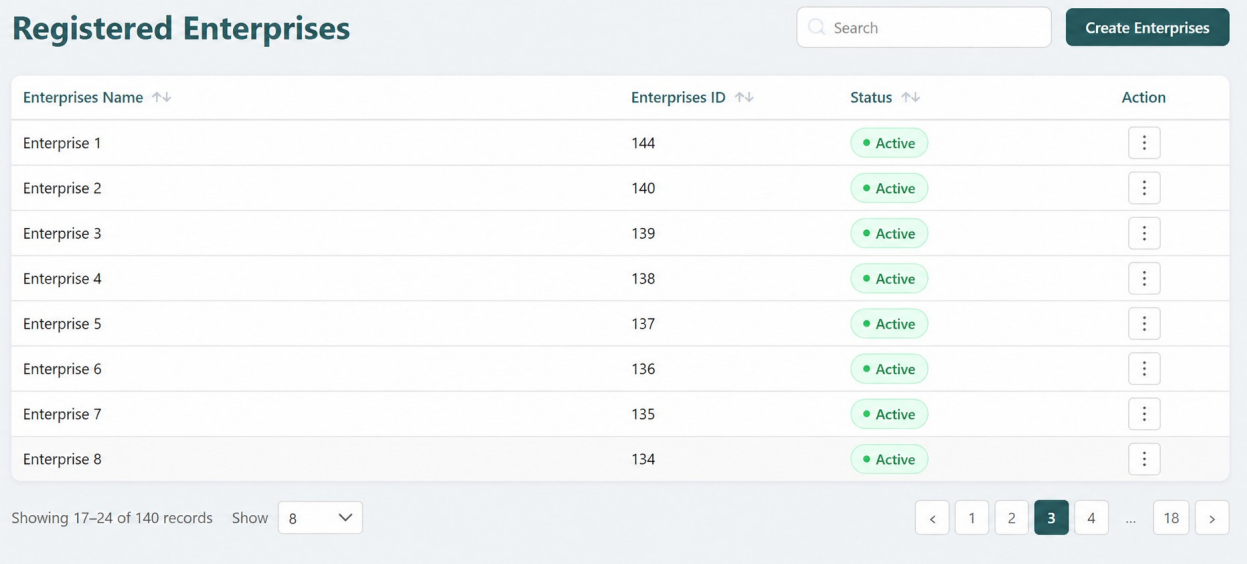
Access (new UI): Sidebar → **ADMIN** → **Enterprise** (opens Registered Enterprises). From an enterprise you manage **Users**, **Groups**, **Roles**, and related screens. Also, under ADMIN (when permitted): **Applications**, **Site Announcements**, **Site Preferences**, **UAS Logs**.

(Legacy "User Administration" on the search page is replaced by these sidebar links.)

A. Enterprise and Users

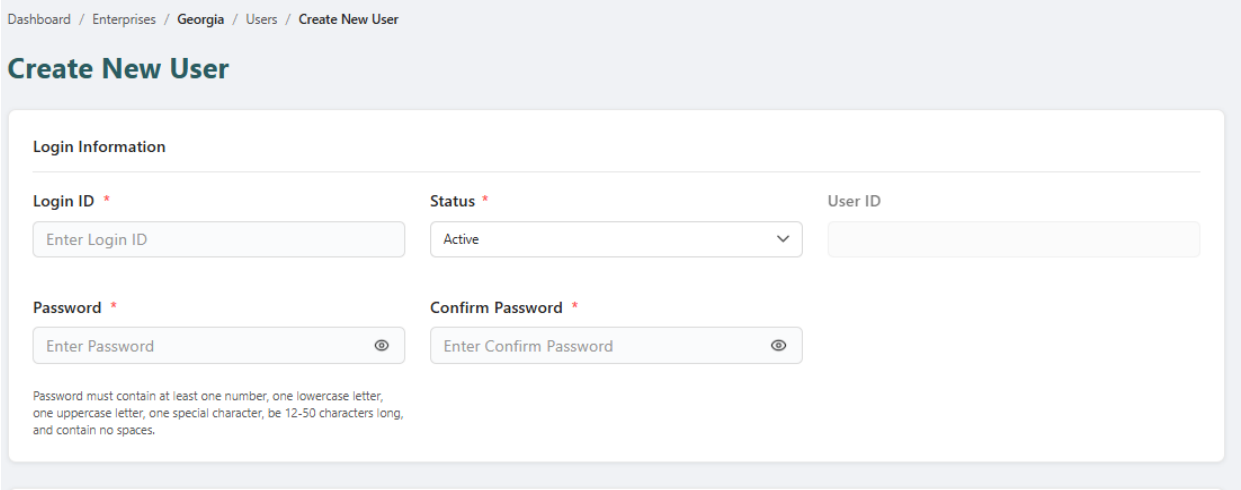
1. Access

Sidebar → **Enterprise** → pick an enterprise (search/sort the **Registered Enterprises** list). Open that enterprise **Users** (User Management). Use **Create Enterprises** only if you have create-enterprise permission.



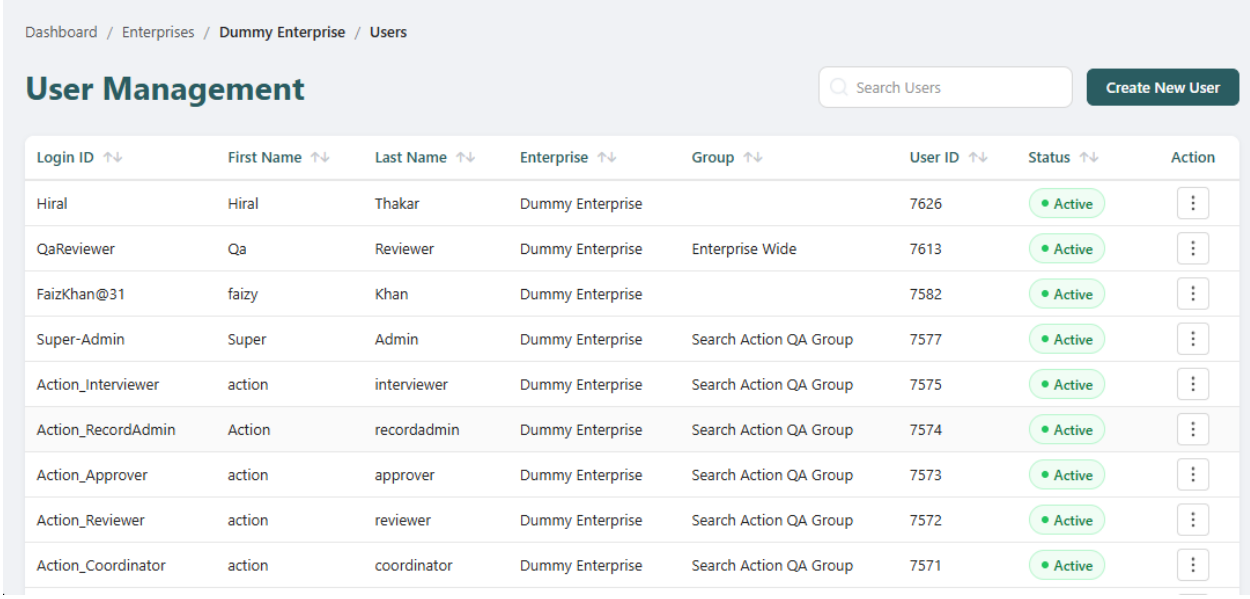
2. Creating a New User

1. User Management → **Create New User**.
2. Enter demographics — include **e-mail** and **phone** (Help Desk often finds users this way). Required fields must be filled.
3. Set status **Active**. Temporary password is meant to change on first login.
4. Assign **Application** (SISOnline and/or UAS separately if both are needed), **Group**, and **Role**.
5. Set permissions as required → save / add the user.
6. Confirm that the account is active and complete.



3. Finding an Existing User

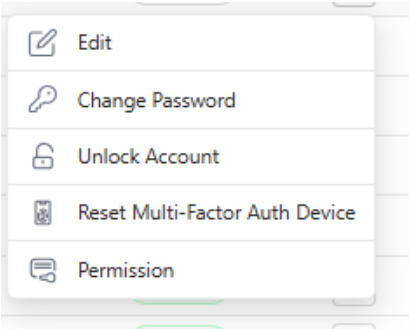
User Management: use **Search Users** (and advanced filters if offered). Filter by login, name, e-mail, **Active / Inactive**, enterprise scope, and role as available. Prefer a broader enterprise search if you cannot find someone in a small group.



4. Updating Existing Users

Open the user from the list (edit / select). Update profile fields, applications, groups, roles, or permissions. Save with **Update**; cancel to discard.

Inactivate (do not delete) accounts that should lose access: set status **Inactive** and update.



5. Profile Changes

Edit e-mail, address, phone, and names as needed. **Do not change Login ID** unless Help Desk directs you. Login ID changes are Help Desk / admin only.

6. Unlocking a User Account

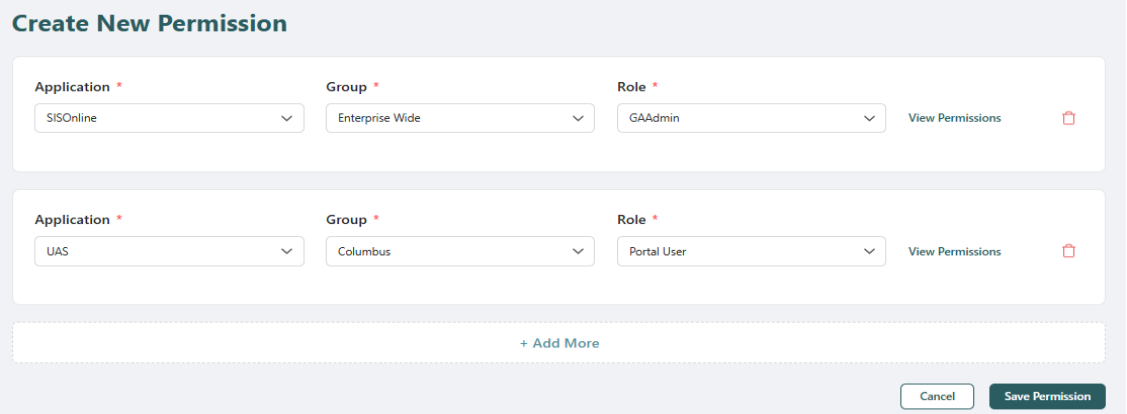
Locked accounts show on the user row / profile. With unlock permission: choose **Unlock Account** → confirm **Unlock**. Advise the user to reset password if they still cannot sign in. Successful login resets the failed-attempt counter. Lock rules are enterprise-configured (see Part One, Section A).

B. Permissions

1. Setting memberships

For a user: open **Permissions** (from the users list). Add/edit **Application**, **Group**, **Role**, and membership **Active/Inactive**. Group defines which records they can see (state-wide vs subgroup). Assign only groups the supervisor authorized.

Users who need both **SISOnline** and **UAS** usually need both application memberships set up.



2. Role and individual permissions

- Edit **role** permissions (Roles → Permissions) to change defaults for many users.
- Edit **user** permissions for one person. Prefer fewer permissions first; add later if needed.

3. Permission definitions (common SIS)

Permission	Purpose
Edit	Edit assessments (assessors need this)
Create	Create assessments
Delete / Undelete	Soft-delete / restore
Archive	Archive records

Move	Reassign group / assignee
Unlock	Unlock locked assessments
Edit Locked	QA edit of locked records
Group Wide	See group assessments, not only assigned
Venture	Venture access (when used)
Report / Export codes	Summary reports

UAS also uses enterprise-wide / application-wide admin rights. Exact labels vary—check the permissions screen for your enterprise.

C. Passwords (admin)

From User Management, open **Change Password** for that user (when permitted). Set the new password and save. Or send a reset invite if your build offers it. Users can also use **Forgot Password** / profile **Reset Password** (Part One).

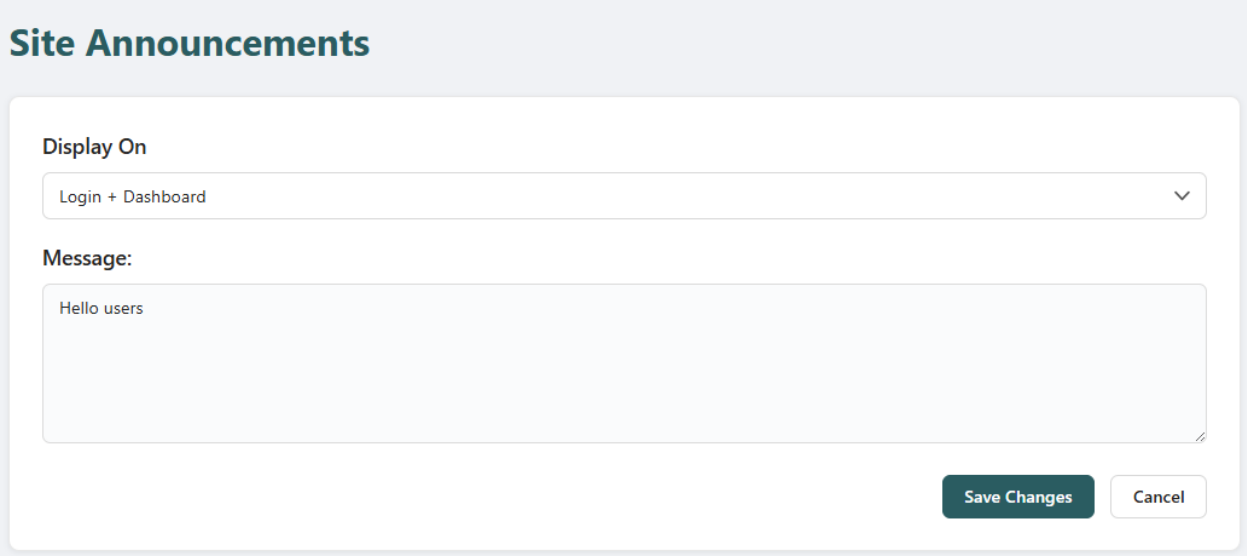
D. Links Between SIS and UAS

In the new app, SISOnline and UAS share one shell: use the **sidebar** to move between Search / assessments and Enterprise / Applications. No separate "open UAS in a new window" step as in the oldest UI.

E. Banner Feature (Site Announcements)

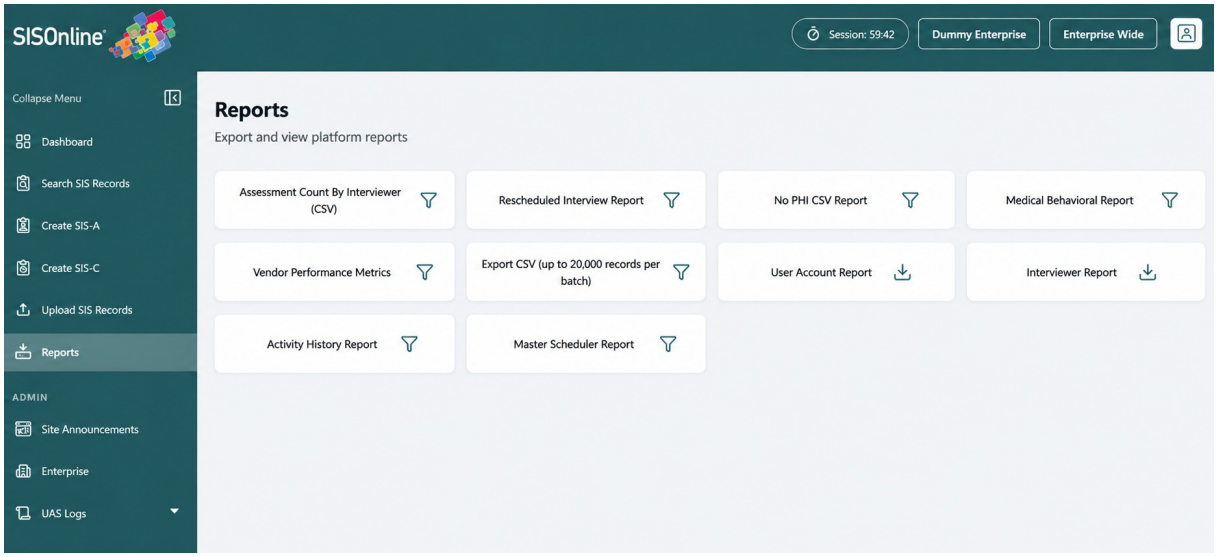
Permission: SISOnline system admin (e.g. sys). Sidebar → **Site Announcements**.

- Enter banner text; set optional expiration date/time.
- **Enterprise-Wide** group → message for the whole enterprise; other groups → that group only.
- Save / update to publish; delete to clear.
- Banner shows at the top of pages (login and/or signed-in shell) until it expires or is removed.



F. Customized Admin Reports

Some enterprises have custom CSV reports (e.g. interviewer duration). Use Sidebar → **Reports** when those cards appear for your account (Part One, Section G).



Part Four: Integration and Customization Options

Enterprise IT / Contract Options. End users usually only need Section A for login. Ask Help Desk for setup that is not enabled in your environment.

A. Same Credentials / Multi-Factor Authentication

One account is used for **SISOnline**, **Venture**, and **UAS** (same username and password).

If login fails: check Caps Lock and spelling → ask supervisor about permissions → Help Desk if needed.

SSO / case-management–only login may be enabled for some enterprises (users then sign in via the CM system). Follow your local process when that applies.

B. Integration with Case Management Systems

Optional web-service integration can:

- Create or update assessments from the CM system (e.g. Participant ID)
- Pre-populate recipient data into SISOnline
- Allow the CM system to poll SISOnline for queued results

Availability depends on your State's contract and IT project. Typical interviewers do not configure this themselves.

C. Case Management and SIS Integration Web Services

Section B describes what CM integration can do in business terms. This section summarizes the **SIS Integration** web services your IT team or integration vendor uses to connect a case management (CM) system to SISOnline. These services are **not** used by typical interviewers in the web application or in Venture.

Who uses these services

- **Enterprise IT, CM vendors, or integration specialists** configure automated exchange of assessment data between the CM system and SISOnline.
- Calls use a dedicated **integration account** (same UAS username and password as other SIS applications) that has **Web Service Access** (WS_ACCESS) on the **Integration** permission group, plus group access to the assessments being created or retrieved.
- Additional permissions apply to some operations, for example **Create** / **Edit** on assessments for import,

Upload Template for spreadsheet import, and report permissions for PDF export.

- Your organization's contract and security settings may require **IP allowlisting** for integration traffic. Contact the SISOnline Help Desk for the service URL, WSDL, and account setup in your environment.

Service endpoint and contract

Integration is provided through a **SOAP** web service compatible with prior SIS releases:

- **Service:** WebService.svc (full path is provided by AAIDD for your stage or production host).
- **WSDL:** append ?wsdl to the service URL to download the contract, operation list, and XML schemas for request and response messages.

The SISOnline **web UI** and **Venture** use separate SOAP APIs under /api/sis/* and /api/venture/*. CM integration should use the SOAP service described here unless AAIDD directs otherwise for your project.

Typical integration flow

A common pattern looks like this:

1. The CM system **creates or updates** an assessment in SISOnline and receives a **form result ID** and key values (for example tracking number).
2. Optionally, the CM system requests a **one-time browser link** so an interviewer can open that record in SISOnline after signing in.
3. While the assessment is in progress, the CM system may **poll status** or **search** for records by tracking number, participant data, or date range.
4. When the assessment is **completed** (or when configured update rules apply), SISOnline may place results on an **update queue** the CM system retrieves by polling.
5. The CM system **exports** completed data as **XML** and/or **PDF** for storage in the case file.

Exact sequencing depends on your State's design; the Help Desk or your integration partner can map these steps to your CM product.

Operations by feature

The table below lists the main web service **operations** (SOAP operation names). Wording matches the WSDL. Each call passes the integration account credentials unless noted.

Feature area	Operation	Purpose
Connectivity	**VerifyHost**	Confirm the integration service is available.
Authentication	**AuthenticateUser**	Verify integration credentials and

Feature area	Operation	Purpose
		WS_ACCESS before building automated jobs.
Create / update from CM	**SaveDataGetKeys**	Import assessment data from an XML document—create a **new** record or update an existing one when a form result ID is supplied. Returns form result IDs and key field values (for example tracking number).
Bulk create from CM	**UploadExcelTemplate**	Create assessments from an enterprise-configured **Excel template** (base64 file upload). Requires template setup and appropriate import permissions.
Open in SISOnline browser	**GetFormEditURL**	Returns a short-lived link for an interviewer to open one assessment. The user follows **AcceptWebServiceLink**, signs in if needed, and is routed via **WebServiceRedirect** to the assessment. Links expire after a brief interval if unused.
Record status	**GetStatusId**	Return the assessment **level of completion** status for a form result ID.
Review status	**GetReviewStatusId**	Return **scheduling / review** status were configured for the enterprise.
Change status from CM	**ChangeStatusId**	Set status from the CM system (for example, New, In progress, Completed, Archived) subject to permissions and business rules. Use with care in production.
Find records	**GetFormResultIdsFromTrackingNumber**	Locate assessments by **tracking number**.

Feature area	Operation	Purpose
Find records	**GetFormResultIdsFromKeyValue**	Search by configured key fields (for example first or last name, participant identifiers).
Find records	**GetFormResultIdsFromDateRange**	Search by date ranges on configured date fields (for example, created, updated, or status change dates).
Export data to CM	**GetDataFormResultIDs**	Export **full assessment XML** for one or more form result IDs.
Export PDF to CM	**GetPdfReport**	Return a **base64-encoded PDF** report for a **completed** assessment; not available until the record is complete.
Validation / scoring	**ValidateAndScoreAssessments**	Run validation and scoring logic and return results in XML for the requested assessments.
Queued updates (polling)	**GetUpdates**	Retrieve **queued XML** for assessments that changed and are ready for the CM subscriber to pull. An empty queue returns a normal "no results" response—not an error. Queue behavior must be enabled for your enterprise.
Platform administration	**Administration**	Limited **cache maintenance** commands for AAIDD platform operations (restricted enterprise; not for State CM accounts).

Support and change control

Integration accounts, WSDL URLs, Excel template names, **GetUpdates** subscription settings, and IP allowlists are configured per enterprise. Do not change production integration settings without approval from your enterprise admin and the SISOnline Help Desk.

For technical specifications, sample XML, or a test environment, e-mail **help@sis-online.org**.

Please contact the SISOnline Help Desk if you have questions while using SISOnline

Monday - Friday, 9am– 5pm. (Eastern) at help@sis-online.org