**I-SWIS Student File Set-Up Checklist**

The I-SWIS Student File Set-Up Checklist is designed to support I-SWIS Coordinators and student support teams (SSTs) in planning out the details of a new (or revised) I-SWIS Student Case File.

**Student Record (Person Management\*)**

*Search the inactive and active records for the student record first to avoid creating a duplicate!*

|  |  |  |
| --- | --- | --- |
| First Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Last Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Gender  M  F  NB  District ID \_\_\_\_\_\_\_\_\_\_ | Ethnicity \_\_\_\_\_\_\_\_\_\_  Race(s) \_\_\_\_\_\_\_\_\_\_\_  English Learner Y N | 504 Y N  IEP Y N  Disability Category(ies):  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

*\* Lists condensed for space. See I-SWIS User’s Manual (Person Management and School Settings sections)*

**Add Student File in I-SWIS (I-SWIS Main)**

**Student Case File Start Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*The start date is usually the first date when supports were provided and/or when data were first collected*

**Student Case File Starting Notes**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Add Team Members in I-SWIS Student File**

*Add/Edit Student, Staff, and Non-Staff Records as needed (Person Management), then add as team members*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Type** | **Full Name** | **Team Role\*** | **Access\*\*** | **Email Address** |
| Staff |  | **Coordinator\*\*\*** | Coordinator |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

*\* Recommended team roles: Student self-advocate, family member(s), staff implementing plan, service providers*

*\*\* Access Levels include:* ***Full, Data Entry, Read Only, and No Access*** *(most members receive No Access)*

*\*\*\* Coordinator is automatically assigned to the user creating the student case file*

**Add Electronic Documents in I-SWIS Student File (Assessment/BSP/Documents)**

*Required: At a minimum, upload the most recent* ***assessment*** *summary and the most recent support* ***plan***

|  |  |  |
| --- | --- | --- |
| **Type** | **File Name** | **Browse (Original File Location)** |
| Assessment |  |  |
| Plan |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

*\*Recommended documents: most recent assessment, most recent support plan, data sheets, meeting minutes*

*\*\*Document types include* ***Assessment****,* ***Plan****,* ***Meeting Minutes****, and* ***Other***

*\*\*\*Remember to use the Add Version when the file is updated*

**Add Fidelity Measure(s) in I-SWIS Student File**

*Required: At a minimum one fidelity measure should be set up to monitor adult activities at least weekly. Some teams prefer one fidelity measure for direct implementation tasks and another for coordination/team tasks.*

**Measure Worksheet**

|  |  |
| --- | --- |
| **Measure Type:** Fidelity Outcome  **Measure Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *This is the label in data entry and at the top or reports to indicate what the measure will monitor*  **Measure Description:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Measure Start Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *The start date is usually the first date when supports were provided and/or when data were first collected* | **Measure Segments:**   * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   *\*Segments are recommended but not required*  **Data Collection Schedule(s)**  Schedule Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Weekly (common):  S M T W R F S weekdays  Monthly (less common):  Day of the Month \_\_\_\_\_\_\_\_\_\_\_\_\_\_  Week of the Month \_\_\_\_\_\_\_\_\_\_ Day: \_\_\_\_\_\_\_  **Measure Goal(s)**  ***Operator***  *Ordered based on common usage patterns* Greater than or equal to *(most common)*  Less than or equal to *(common)* Great than  Less than  Equal to *(uncommon)*  ***Target:*** \_\_\_\_\_\_\_\_ *Target may be a number or percentage, depending on metric worksheet*  Goal Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Goal End Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \**Goal end date not required* |
| **Metric Type:**  Scale Pct Calc Pct Rate Pts/Ct/Dur  *\*Copy the corresponding metric worksheet into this box* |
|  |

Add measure worksheets as needed *(one per page usually works best)*

**Add Outcome Measure(s) in I-SWIS Student File**

*Required: At a minimum one fidelity measure should be set up to monitor change in student desired behavior(s), replacement behavior(s), and/or problem behavior(s).*

**Measure Worksheet**

|  |  |
| --- | --- |
| **Measure Type:** Fidelity Outcome  **Measure Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *This is the label in data entry and at the top or reports to indicate what the measure will monitor*  **Measure Description:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Measure Start Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *The start date is usually the first date when supports were provided and/or when data were first collected* | **Measure Segments:**   * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   **Data Collection Schedule(s)**  Schedule Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Weekly (common):  S M T W R F S weekdays  Monthly (less common):  Day of the Month \_\_\_\_\_\_\_\_\_\_\_\_\_\_  Week of the Month \_\_\_\_\_\_\_\_\_\_ Day: \_\_\_\_\_\_\_  **Measure Goal(s)**  ***Operator***  *Ordered based on common usage patterns* Greater than or equal to *(most common)*  Less than or equal to *(common)* Great than  Less than  Equal to *(uncommon)*  ***Target:*** \_\_\_\_\_\_\_\_ *Target may be a number or percentage, depending on metric worksheet*  Goal Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Goal End Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \**Goal end date not required* |
| **Metric Type:**  Scale Pct Calc Pct Rate Pts/Ct/Dur  *\*Copy the corresponding metric worksheet into this box* |
|  |

Add measure worksheets as needed *(one per page usually works best)*

**Metric Worksheets TEMPLATES by Metric Type**

*Copy the content of the cell/box that corresponds with the metric type and paste into the bottom left cell/box of the measure worksheet. Be sure to only copy the contents (not the entire table or cell) to avoid skewing the measure worksheet.*

|  |  |
| --- | --- |
| **Scale Metric Worksheet** *Likert-type scale with low and high score*  ***Scale Range***: Min \_\_\_\_\_\_\_ Max \_\_\_\_\_\_\_ *Min = lowest possible rating/score Max = highest possible rating/score per segment  (or total if segments not used)*  ***Scale Labels***  *Varies based on Min and Max*  Min (e.g., 0): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  \* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Max (e.g., 5): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  ***Options***  Calculate as a: Count Percentage  Segment Aggregation: Avg Sum *Default: Count with Average*  *Example 1: Fidelity rating card*  Min: 0 Max: 4  Scale Labels: 0 = not at all, 3 = acceptable, 4 = excellent  Segments: materials prepared, check-in, transition prompts  *Example 2: Time On-Task*  Min: 0 Max: 6  Scale Labels: 0 = Less than 5 min on task, 6 = 90%+ on-task  Segments: homeroom, language arts, humanities, science, art | **Calculated Percent Metric Worksheet**  *Percentage of events, time, or scores by the total possible opportunities or highest possible score*  ***Min***: 0  ***Min Label***: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *Numerator or number of interest; provide a label (word or phrase) to indicate data being collected*  ***Max***: \_\_\_\_\_\_\_\_\_ ***Min Label***: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *Denominator or total/highest possible, provide a label (word or phrase) to indicate data being collected*  ***Options***  Always use **Variable** Max!  *Example 1: Student Point Card or DPR*  Min: 0 Min Label: Points earned  Max: 5 Max Label: Possible points per segment  *\*Segments are 4 student desired behaviors  \*\*If no segments the max is 20 (5 X 4 = 20)*  *Example 2: Time On-Task*  Min: 0 Min Label: Minutes on-task  Max: 20 Max Label: Total activity minutes  *\*Segments are the 8 activities in the student’s schedule* |
| **Rate Metric Worksheet**  *Count of events divided by time observed*  ***Sample***: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *Behavior or event being “sampled” or tracked*  ***Unit:***  *Common* minute hour  *Uncommon* second day  ***Default Time***: \_\_\_\_\_\_\_\_\_ (units)  *Typical observation/activity time per segment (or total time when behavior is expected)*  *Example 1: Opportunities to respond*  Sample: OTR Unit: minute  Default Time: 15 min *\*Teacher working on OTRs takes brief (15min) videos and then reviews later to count the number of OTRs per minute.* | **Percent Metric Worksheet**  *Percentage of events, time, or scores with all calculations completed outside of I-SWIS*  No Options  ***Min:*** 0%  ***Max:*** 100% |
| **Points/Count/Duration Metric Worksheet**  *This metric type is less preferred/common and provides a simple count of events, time, or scores with no adjustment for opportunities or time.*  ***Options***  Segment Aggregation: Avg Sum *Default: Average* |

**Extra Measure Worksheets**

*Copy and paste additional measure worksheets to allow you to plan for all desired fidelity and outcome measures in the I-SWIS Student Case File. Be sure to copy the* ***entire table*** *to avoid skewing the worksheet or losing components.*

**Measure Worksheet TEMPLATE**

|  |  |
| --- | --- |
| **Measure Type:** Fidelity Outcome  **Measure Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *This is the label in data entry and at the top or reports to indicate what the measure will monitor*  **Measure Description:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Measure Start Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  *The start date is usually the first date when supports were provided and/or when data were first collected* | **Measure Segments:**   * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ * \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   **Data Collection Schedule(s)**  Schedule Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Weekly (common):  S M T W R F S weekdays  Monthly (less common):  Day of the Month \_\_\_\_\_\_\_\_\_\_\_\_\_\_  Week of the Month \_\_\_\_\_\_\_\_\_\_ Day: \_\_\_\_\_\_\_  **Measure Goal(s)**  ***Operator***  *Ordered based on common usage patterns* Greater than or equal to *(most common)*  Less than or equal to *(common)* Great than  Less than  Equal to *(uncommon)*  ***Target:*** \_\_\_\_\_\_\_\_ *Target may be a number or percentage, depending on metric worksheet*  Goal Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Goal End Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \**Goal end date not required* |
| **Metric Type:**  Scale Pct Calc Pct Rate Pts/Ct/Dur  *\*Copy the corresponding metric worksheet into this box* |
|  |