ECSWIS

User's Manual

November 2019

PBISApps

How to Find Help

This manual is your first step for EC-SWIS support. Can't find the information you need? Contact your SWIS Facilitator.

My EC-SWIS Facilitator Information

Facilitator Name: _____

Phone Number: _____

Email Address: _____

For More Information

Are you still stuck? Visit the PBISApps support website online at

support.pbisapps.org

There you will find answers to many common questions, a searchable knowledge base and discussion forum, and ways to contact PBISApps to ask your question directly.

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Overview

Who Should Use This Manual?

The purpose of the EC-SWIS User's Manual is to provide EC-SWIS users a quick reference and trouble-shooting guide. The manual is for use by EC-SWIS facilitators and EC-SWIS users during initial start-up, training, and ongoing use. Much of the information found in this manual is also available online at www.pbisapps.org.

What is PBISApps?

PBISApps is a not-for-profit group, developed and operated by Educational and Community Supports (ECS), a research unit at the University of Oregon. The PBISApps team manages a series of educational tools related to the implementation of multi-tiered systems of support (MTSS). These tools include the School-Wide Information System (SWIS) Suite, PBIS Assessment, and PBIS Evaluation. These applications have been implemented in more than 25,000 schools in the US and abroad. PBISApps has been making schools safer and more productive places for over 10 years by empowering educators to make data-based decisions as problems emerge.

What is the SWIS Suite?

The SWIS Suite — a set of four applications (EC-SWIS - a version of SWIS for early childhood settings, CICO-SWIS, I-SWIS, and SAMI) — is a reliable, confidential, web-based information system built to collect, summarize, and use child behavior data for decision making. Research demonstrates that educators can make more effective and efficient decisions

HERE'S A TIP

Some aspects of EC-SWIS may be inaccessible based on your access level. Please contact your facilitator to have your access modified. For more information about access levels, see the support article on PBIS-Apps.com by searching for "access levels".

when they have the right data in the right format at the right time. The SWIS Suite provides school/program personnel with the information they need to be successful decision makers.

What is EC-SWIS?

EC-SWIS allows users to collect information about behavioral incidents. The behavior data can be instantly accessed in tables, reports, and graphs allowing for teams to easily monitor and analyze behavior trends at the program-wide, small group, and individual levels.

Information entered into EC-SWIS is confidential and secure. EC-SWIS protects data through the use of account-specific passwords and high-quality data protection procedures. The EC-SWIS Confidentiality & Security Statement can be accessed at www.pbisapps. org.

Video Tutorials

There are many video tutorials available on our website as supplements to these written instructions.

Video tutorials and FAQs are available on the PBISApps homepage in Resources or Support.

All videos can be found on our website http://www.pbisapps.org by navigating to Resources > Video Tutorials in the main navigation.

Log In/Log Out

From your preferred internet browser (e.g., Internet Explorer, Firefox, Safari, Chrome) type in the website address https://ec.swis.org to access EC-SWIS.

Once at the login page:

1. Enter the email address and password associated with the EC-SWIS account.

2. Click Login. (If the password is a temporary password, a prompt appears for a permanent password to be created.)

To log out of an EC-SWIS account:

1. Click on the user's email address located in the app bar at the top of the screen.

2. Click Logout.

Note: Users can also click on the Logout icon located in the blue bar at the top of the screen.

School Select Menu

Users with access to more than one program's account see a menu displaying each program's name. The School Select menu provides basic overview information without logging directly into the program's account.

Select School Menu Feature Overview

- **Search:** Type the name of a program on your list to jump directly to that account.

- **Favorites List Filter:** Click to display only programs marked as your favorites.

- **DataLink Schools List Filter:** Click to display only programs participating in DataLink to upload data.

- **Favorite:** Click the star to mark the program as a favorite.

- **Info:** Click to access additional information about the account.

- **Login:** Click to login to the program's account.

School Details Information Menu Feature Overview

- **School Information:** See which applications the program accesses, the program's grade range, and a full list of users along with their last login dates and times.

- **School Contact Information:** View the programs mailing and physical addresses, phone number, and fax number.

- **SWIS Information:** Access the SWIS contact's name and email, SWIS facilitator's name and contact information, and see whether the program uses the SWIS Person Import feature.

- **DataLink Information:** This section provides information about whether

the program uploads data using DataLink and what the latest upload file contained.

Switch Schools

Users with access to more than one program can switch programs without logging out of EC-SWIS. *Note: Users with access to a single program's account will not have access to this feature in the Tools menu.*

1. Once logged in and inside the SWIS Suite, click Tools.

2. Click Switch School.

3. Select the desired program from the drop-down menu.

4. Click OK.

Quick Start

Enter an Incident
From the EC-SWIS Dashboard

1. Click Add Incident located at the top of the Dashboard screen.

2. Enter all required fields.

3. Click Save as Complete.

Note: EC-SWIS will not save an incident until all required fields are completed. Any missing information will be highlighted in red and identified with a red exclamation mark when left blank.

Enter a Child or Staff

1. Click the Person Management icon located in the upper right-hand corner of the screen

2. Click on the correct tab: Children, Staff, Non-Staff.

3. Click Add.

4. Enter all required information about the person.

5. Click Save to save or click Save and New to save and open a new form to continue adding new person records.

View Reports

Click on the View Reports button within the EC-SWIS navigation bar to access the reports dashboard. To open a new report, click on the appropriate report icon. The report opens with data presented based on default report settings.
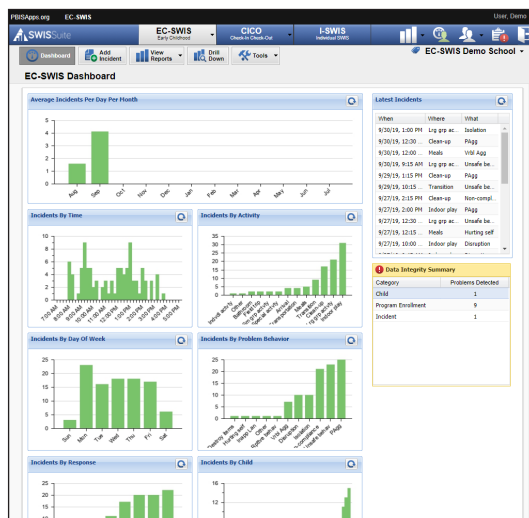
Dashboard

Program Summary

The EC-SWIS Dashboard displays a Program Summary Report with the following graphs displayed:

- Average Incidents per Day per Month

- Incidents By Time

- Incidents By Activity

- Incidents By Day Of Week

- Incidents By Problem Behavior

- Incidents By Response

- Incidents By Child

Click on any of these reports to open it in a new screen displayed with the report and associated data table.

The EC-SWIS Dashboard.

Announcements

Occasionally, there are logistics to which a program must attend. When something requires a user's attention, the information displays on the right-hand side of the EC-SWIS Dashboard.

Invoice Status

When the account's invoice is due and unpaid, an alert displays with the invoice status and a link to the Invoice Details page. For more information on paying invoices, see Tools - Invoice Details on page 38.

Missing Days and Enrollment Information

There are reports in EC-SWIS calculated using school days per month and enrollment information. Without it, the reports won't generate at all. If the data are missing in the account, an announcement displays prompting the user to enter the information now.

Latest Incidents

Located to the right of the Program Summary Report is a list of Latest Incidents. The section lists the ten most recent incidents. Double-click on any entry to review, edit, or print the incident. Use the navigation at the bottom of the list to scroll to older incident entries.

Data Integrity Summary

Displayed under the Latest Incidents, the Data Integrity Summary is a list of all possible problematic data. If all data within the SWIS Suite are accurate, the summary will not appear on the EC-SWIS dashboard. All possible errors listed here appear based on the Data Integrity settings set in School Settings.

Double-click any entry to review and edit any information within the Data Integrity workspace.

Categories to appear in the summary include:

- Child

- Staff

- Non-Staff

- School Days

- Program Enroll-
  ment

- Preferences
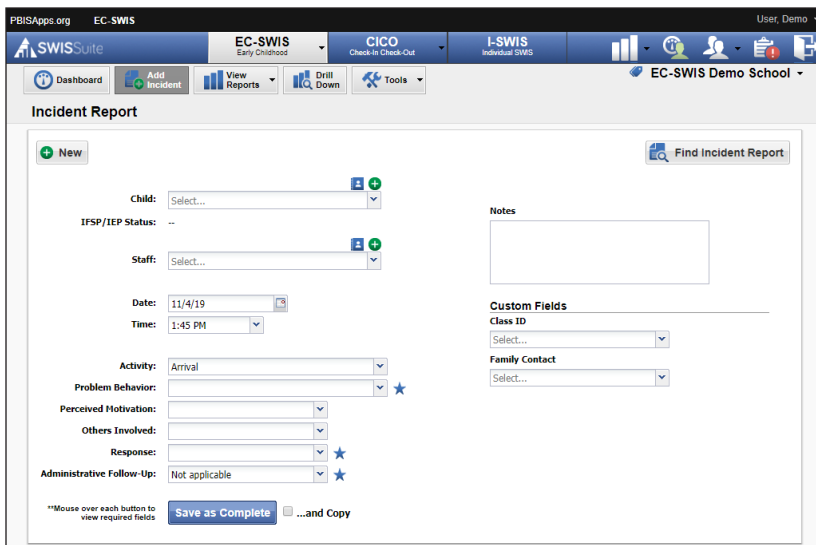
- Incident

- CICO

Add Incident

From the EC-SWIS Dashboard

1. Click Add Incident.

2. Enter all required fields (either type directly or click to select in any field).

3. Click Save as Complete to save the incident.

Note: EC-SWIS will not save an incident until all required fields are completed.

Required Fields

- **Child:** Type or select the child's name from the drop-down menu.

- **Staff:** Type or select the referring staff member's name from the drop-down menu.

- **Date:** Type the incident date in the field or select it from the calendar icon.

- **Time:** Select the nearest time the incident occurred.

- **Activity:** Select the activity the child was involved in when the incident occurred.

- **Problem Behavior:** Select the primary problem behavior.

- **Perceived Motivation:** Select the perceived child motivation for the problem behavior.

- **Others Involved:** Select whether others were involved in the incident.

- **Response:** Select the referring staff member's response to the problem behavior

The Add Incident workspace.

- **Administrative Follow-up:** Select an administrator's action if applicable.

- **Notes:** Type any necessary anecdotal information about the incident into the Notes field (500 characters).

Copy Incident Information to Next Incident

Check the And Copy box before saving the incident when more than one child is involved in the same incident. The following incident information will be copied over to the next incident:

▪ Staff	▪ Time	▪ Problem Behavior
▪ Date	▪ Activity	▪ Others Involved

HERE'S A TIP

The star icon identifies the primary problem behavior, response, and administrative follow-up. To remove any behavior, response or follow-up, click the red X next to the data to delete.

To copy information from one incident to the next:

1. Complete the incident entry for the first child.

2. Click to check the And Copy checkbox.

3. Click Save as Complete.

4. Enter the missing information into the second child's incident.

5. Click Save as Complete.

Custom Fields

A program may identify additional information about an incident necessary for local decision making, district/state reporting, or other purposes. EC-SWIS allows up to ten custom fields to be added. Custom Fields can be enabled, disabled, or modified to fit local needs. Management for Custom Fields is located in School Settings.
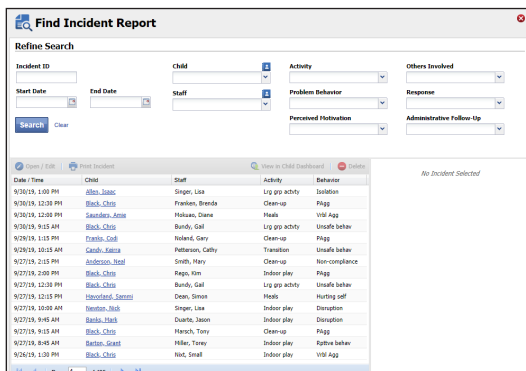
Find and View, Edit, or Delete Incident

To find a specific incident, or group of incidents to view, edit, print, or delete:

1. Click the Find Incident button located in the upper right-hand corner of the Add Incident data entry screen. *Note: You can also locate Find Incident in the Tools menu.*

2. Enter search criteria into the chosen fields, and click Search. *Note: The Start Date and End Date fields default to the last two weeks. Edit the dates to expand the search.*

   a. **To view the incident data:** Click an incident to select it. A summary

report of the incident displays to the right.

b. **To edit the incident:** Double click on a incident and click Edit. Revise incident information as necessary. Click Save.

The Find Incident workspace.

c. **To delete the incident:** Click an incident to select it. Click the Delete button located in the upper right-hand corner of the result set. Click Delete to confirm.

View Reports

Click on the View Reports button within the EC-SWIS navigation bar to access the reports dashboard. To open a new report, click on the appropriate report icon. The report opens with data presented based on default report settings.

Refine a Report

1. Open the desired report.

2. In the Options section of the report screen, modify the options as needed.

3. Click Generate.

Print a Report

1. Within a generated report, click the Print icon located to the right of the Generate button.

2. From the pop-up dialog box, select to print the graph only, the table only, or both.

3. Click Print.

HERE'S A TIP

Open multiple reports in tabs for efficient access to the information you need.
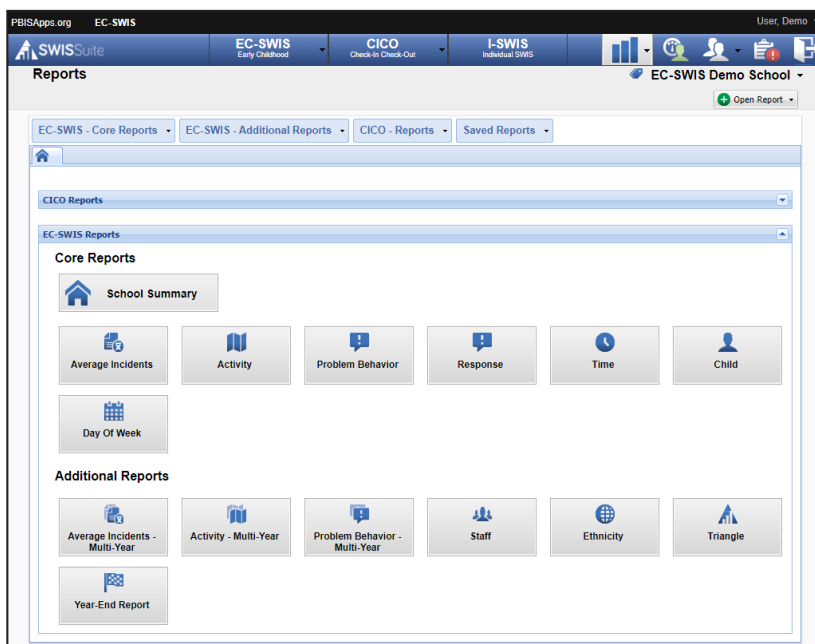
The View Reports dashboard.

Report Types: Core vs Additional

Reports available in EC-SWIS are organized into two categories: Core Reports and Additional Reports.

Core Reports

The Core EC-SWIS reports present data necessary for monitoring program-wide problem behavior patterns.

- **School Summary:** Seven Core Reports in one summary - Average Incidents Per Day Per Month, Incidents by Problem Behavior, Activity, Time, Child, Day of Week, and Response.

- **Average Incidents Per Day Per Month:** The average (mean) number of incidents given per day per month during the year. The national average is available for comparison.

- **Incidents by Activity:** The activities when incidents are most likely to occur in the program.

- **Incidents by Problem Behavior:** Which behaviors occur most frequently in the program.

- **Incidents by Response:** The action referring staff take in response to the problem behavior.

- **Incidents by Time:** When inci-

dents are most likely to occur. Times reported in 15 minute increments.

- **Incidents by Child:** Which children are referred most frequent-

ly in the program. The option to show child names is available.

- **Incidents by Day of Week:** Which days experience the most frequent problem behaviors.

Additional Reports

Additional reports available within the Reports menu present data related to specific areas of concern.

- **Multi-year reports for Average Incidents Per Day Per Month, Activity, and Problem Behavior:** Reports displaying data across multiple years for each of the named reports. The current year displays year-to-date data; all previous years contain data for the entire year.

- **Incidents by Staff:** Which staff members referred children throughout the year. This report is accessible only to EC-SWIS Admin users.

- **School Ethnicity:** Four reports

used to discuss areas of disproportionality in the program. Graphs included in the School Ethnicity Report are: Incident Risk Index, Incident Risk Ratio, Children with Incidents by Ethnicity, Incidents by Ethnicty.

- **Triangle Data:** The proportion of children with 0-1, 2-5, or 6+ incidents.

- **Year-End:** Multiple reports and tables providing a comprehensive look at incident data for the entire school year.

Drill Down

Teams can expand on the information presented in the Core or Additional Reports by using the Drill Down tool. Drilling down data leads to more targeted behavior supports and practices for improved child outcomes.

To use the Drill Down report:

1. Click on Drill Down in the EC-SWIS navigation bar.

2. From the Report Filters listed on the left, select the data to include or exclude from the dataset. By default, the current school year is already included in the dataset.
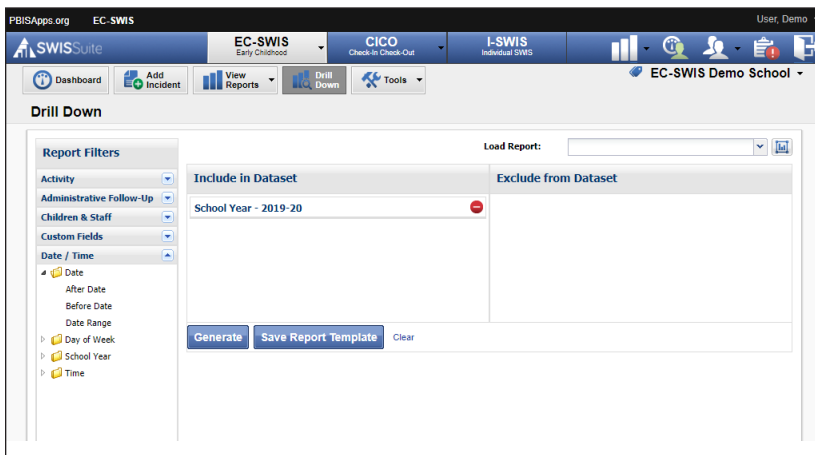
The Drill Down workspace.

3. To select a specific report filter, click on the report filter to expand it.

    a. **To include/exclude:** Right-click on a filter and choose to Add to Included Filters or Add to Excluded Filters.

    b. **To remove:** Click the filter's trashcan icon.

    c. **To move a filter between include and exclude:** Click on the report filter. Drag and drop it.

4. Click Generate.

Drill Down Options

1. **Change the graph type:** Use the Graph Type drop-down menu to the right of the graph to change the graph type.

2. **Show values on the graph:** Check the box to display incident counts above the bars in the graph.

3. **Sort the data table:** Click the triangle in any column header to sort the data in ascending or descending order..

4. **Save report template:** Click Save Report Temple to save the specific data filters. Choose to share the template with another EC-SWIS user in the program by checking the Share Template Within School option.

5. **Load a saved template:** Saved Report Templates can be easily accessed in the future by using the Load Report drop-down menu located in the top right-hand corner of the Drill Down dashboard space.

Print a Drill Down Report
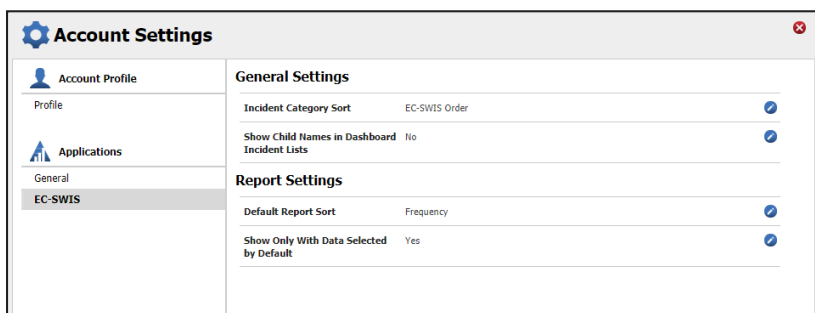
1. Click the Print icon located beside the report's graph.

2. Select to print either the graph only, the table only, or print both the graph and table.

3. Click Print.

Tools – Account Settings

Account Settings allow an individual user to update personal profile information and update personalized application settings to accommodate data entry or reporting preferences. An account's settings are stored individually for each password accessing EC-SWIS, allowing each user to customize EC-SWIS for individual usage.

To access Account Settings:

1. Click Tools.

2. Click Account Settings.

The Account Settings > Applications > EC-SWIS settings.

Within the Account Settings menu, programs can view and modify information related to Account Profile and SWIS Suite Applications.

Account Profile

Account Profile Settings allow a user to verify and update name, contact email, username, password, or avatar.

To modify Account Profile Settings, in Account Settings:

1. Click on Profile under Account Profile.

2. Click the name of the section to edit.

3. Type the new information to modify Account Profile information.

4. Enter your current password for changes to take effect.

5. Click Save.

Applications - General

Applications settings allow users to enable specific settings according to personal preference. General settings include:

- Locale
- Default Graph Size
- Name Sort Order
  (First Last vs Last First)

To modify General settings, in Account Settings:

1. Click on General under Applications.

2. Select the setting to modify.

3. Type or select the preferred option for the setting.

4. Click Save.

Applications - EC-SWIS

To modify EC-SWIS Application settings, in Account Settings:

1. Click EC-SWIS under the Applications menu.

2. Select the setting to modify and select the preferred option for the setting.

3. Click Save.

Incident Category Sort

Default: EC-SWIS Order

Alphabetical will sort the labels alphabetically. EC-SWIS Order will sort the labels based on national usage trends.

Show Child Names in Dashboard Incident Lists
Default: Enabled

When enabled, the Latest Incidents section of the EC-SWIS Dashboard displays child names. Disabling the setting will hide child names from this section of the dashboard.

Default Report Sort
Default: Frequency

Frequency will order items on reports from least to most frequent. Alphabetically will order items on reports alphabetically. EC-SWIS Order will order items on reports based on national trends.

> **HERE'S A TIP**
> School Settings are set for the entire program and will be the same for all EC-SWIS users.

Show Only With Data Selected by Default for reports
Default: Enabled

When enabled, this setting checks the report option to display only items associated with one or more incidents by default. Disabling the setting leaves the report option unchecked by default.

Tools – School Settings

To access School Settings:

1. From the EC-SWIS Dashboard click Tools.

2. Click School Settings.

Within the School Settings menu, program can view and modify information related to:

- School Profile
- Core Data
- General and Application-Specific Settings
- Data Integrity Settings

School Profile

The School Profile includes all physical and contact information for the program. Any of the information provided in this section can be updated with the exception of the District Name. *Note: EC-SWIS Admin users may request a change to the program name.*:

- District Name
- Program Name
- Mailing Address
- Physical Address
- Grade Range
- Phone Number
- Fax Number

School Profile – Contact Information

Contact information for the following roles can be located and/or edited as changes occur.

- Admin Contact
- Billing Contact
- Paying Institution
- Facilitator Contact

Core Data – School Days

To enter or modify School Days, from School Settings:

1. Click School Days under Core Data.
2. Click on the school year to expand the menu.
3. Type or select the number of school days for each calendar month (Early release days count as one full day).
4. Click Save.

Core Data – Program Enrollment

To enter or modify Program Enrollment, in School Settings:

1. Click on Program Enrollment.
2. Click on the correct school year to expand the menu.
3. **If the program collects race/ethnicity information:** Enter the number of

children within each ethnic group. Total Program Enrollment calculates automatically based on the race/ethnicity enrollment entered.
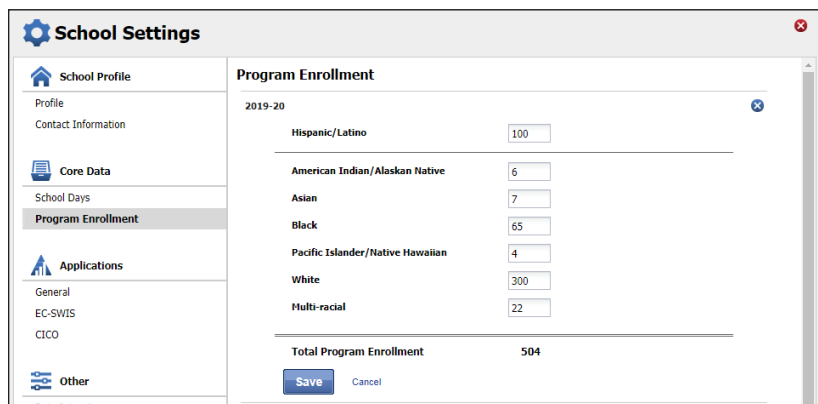
4. **If the program does not collect race/ethnicity information:** Enter the total enrollment.

5. Click Save.

Note: In order to generate program-wide reports such as the Average Incident Per Day Per Month or Ethnicity Reports, EC-SWIS requires details about School Days and Program Enrollment.

Applications - General

To enter or modify General Settings, in School Settings:

1. Click General.

The School Settings > Core Data > Program Enrollment settings.

2. Click anywhere within the row of the appropriate field to expand the menu.

3. Choose Yes to enable the identified feature.

4. Choose No to disable the feature.

5. Click Save.

6. Close School Settings by clicking on the red X icon in the upper right corner of the screen.

Start Month
Default: August

This setting sets which month is considered the start of the year for reporting and decision-making purposes.

To modify the Start Month:

1. Select the appropriate month from the drop-down menu.

2. Click Save.

Use 504
Default: Enabled

Programs may opt to collect data about individual children's 504 status. To disable this feature:

1. Select No from the drop-down menu.

2. Click Save

Use Ethnicity
Default: Enabled

When Use Ethnicity is enabled, the EC-SWIS Suite will require race/ethnicity data to be entered. To disable ethnicity as a required field, in School Settings:

1. Select No from the drop-down menu.

2. Click Save.

For more information about entering individual child ethnicity and race information, please refer to the Person Management section on page 31.

Risk Ratio Comparison Group

Default: All Other Groups

When generating the Risk Ratio graph in the Ethnicity Report, the risk index for a group will be compared to the risk index for the comparison group selected in this preference. Programs may select a different comparison group representing the majority group and dominant culture in the program.

HERE'S A TIP

The federal government requires programs, schools, districts, and states to **collect** individual-level race and ethnicity data and **report** aggregated data in the following ways:

- Individual children must report both their ethnicity and race.

- Children may identify more than one race.

- Multi-Racial is listed only as a category for aggregate reporting purposes.

Use English Learner

Default: Disabled

When enabled, users can identify each child's English Learner status. To enable this setting:

1. Select Yes from the drop-down menu.

2. Click Save.

Use IFSP/IEP

Default: Enabled

When enabled, users will identify each child's IFSP/IEP status and disability category. To disable this setting:

1. Select No from the drop-down menu.

2. Click Save.

Use Additional Gender Options
Default: Disabled

When enabled, users select one of three options for a child's identified gender:

- Male

- Female

- Non-Binary/Transgender/Other Gender

When disabled, there are only two gender options available for selection (Male and Female). Once enabled, users cannot disable this setting. To enable this setting:

1. Select Yes from the drop-down menu.

2. Click Save.

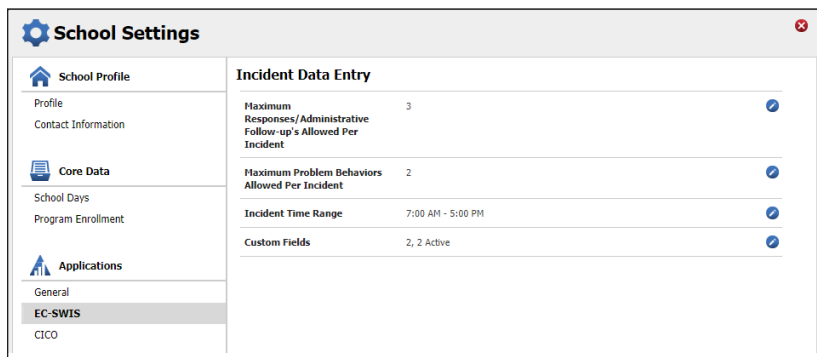### Require Staff District IDs and Require Child IDs
Staff District ID Default: Enabled

Child ID Default: Enabled

EC-SWIS allows the program to utilize district/internal identification numbers for staff and/or children in addition to the EC-SWIS assigned ID number. If disabled, the staff and/or child EC-SWIS ids are displayed on reports. To disable this feature:

1. Select No from the drop-down menu.

2. Click Save.

The School Settings > Applications > EC-SWIS settings.

Applications - EC-SWIS

Maximum Responses/Administrative Follow-ups Allowed Per Incident
Default: One

A maximum of five responses and five administrative follow-ups per incident are possible.

To modify the Maximum Responses/Administrative Follow-ups Per Incident, in School Settings:

1. Click EC-SWIS under Applications.

2. Click Maximum Responses/Administrative Follow-ups Allowed Per Incident.

3. Type or select the maximum number of actions taken to add to a incident.

4. Click Save.

Maximum Problem Behaviors Allowed Per Incident
Default: One

A maximum of five problem behaviors per incident is possible.

To modify the Maximum Problem Behaviors Per Incident, in School Settings:

1. Click EC-SWIS under Applications.

2. Click Maximum Problem Behaviors Allowed Per Incident.

3. Type or select the maximum number of behaviors to add to a incident.

4. Click Save.

Incident Time Range
Default: 7:00 AM – 5:00 PM

This setting allows programs to select the time range within which incidents may occur. By selecting 7:00 am – 5:00 pm, incidents cannot have occurred before 7:00 am or after 5:00 pm. Selecting 12:00 am – 11:45 pm allows incidents to occur any time of day.

Custom Fields
A program may identify additional information needed for local decision making, district/state reporting, or other purposes. For this information, EC-SWIS allows up to 10 custom fields to be established.

To add or modify Custom Fields, in School Settings:

1. Click EC-SWIS the Applications.

2. Click Custom Fields.
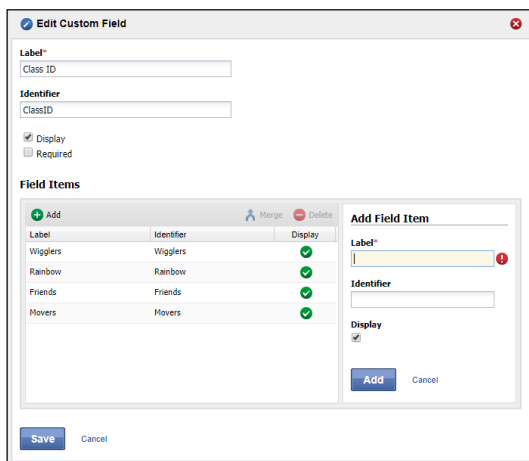
To add a new custom field:

1. Click Add

2. Give your new Custom Field a name by entering it in the Label field.

3. If integrating EC-SWIS data with another system, type the identifier in the Identifier field. Otherwise, leave this field blank.

4. Check the Display box to display the field on the incident data entry workspace.

5. Check the Required box if this custom field must be entered with every incident entered.

6. Click Add.

7. Create a new item for the drop-down menu by entering the item's name in the Label field under Add Field Item.

8. Click Save.

9. Keep adding new items until all information is displayed.

10. Click Save at the bottom left-hand corner of the workspace.

To modify an existing custom field:

1. Double-click the custom field to modify.

The School Settings > Applications > EC-SWIS > Custom Fields > Edit Custom Field settings.

2. Modify any of the information displayed.

3. Click Save at the bottom left-hand corner of the workspace.

To merge two labels:

1. Double-click the custom field with labels to merge.

2. Select the item to keep.

3. Click Merge.

4. Select the item to remove.

5. Click Merge.

Note: Merging labels will update all existing incidents to use the item label retained.

To delete a custom field:

1. Click to select the field to delete.

2. Click the Delete button. Deleting a field will remove the data for all existing incidents associated with the field.

3. Click Yes to confirm the deletion.

To hide a specific Custom Field rather than delete it:

1. Click to select the name of the field to hide.

2. Click Edit.

3. Uncheck the Display box to hide the Custom Field.

4. Click Save.

5. Click Save.

> **HERE'S A TIP**
> Some examples of Custom Fields categories and labels:
>
> **Category:** Family Contact **Category:** Class ID
> **Labels:** Email, Mail, Phone, In **Labels:** Wigglers, Rainbows,
> Person, and Unable to Contact Friends, Movers

Other - Data Integrity

The Data Integrity system alerts of any possible data errors within the SWIS Suite. Errors identified within your account are based upon the settings established in the Data Integrity School Settings. To establish settings for the Data Integrity system, in School Settings:

1. Click on Data Integrity under Other.

2. Check the box to the left of the record type to enable a check within the system. Unchecked record types will be ignored for data integrity errors.

3. Select a date from any of the calendar icons to choose a date after which specific record types will be included.

4. Click Save.

Tools – Person Management

Person Management allows programs to organize children, staff, and non-staff records associated with SWIS Suite data.
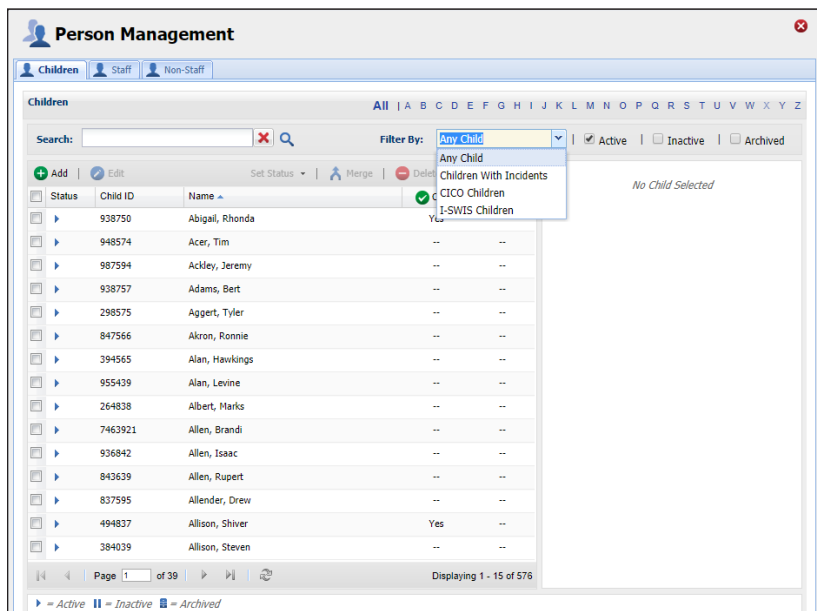
The Person Management workspace.

To access Person Management:

1. Click Tools.

2. Under the Person Management header, select the appropriate list (Child, Staff, Non-Staff) to review or modify.

Note: Person Management is also located in the top right-hand corner of the application next to the Logout icon.

Within Person Management, only records with a status matching the selected filters will be displayed. First select from the filters available within the drop-down menu. Then, check or uncheck Active, Inactive, and Archived to display or hide a name from the list.

- To see all currently active person records, check only the Active box from the filters. The first 15 active records display in the result set.

- Use the navigation at the bottom of the screen to tab through the list and view additional records.

- Click on a name to display the person's information to the right of the list.

Add a New Record

1. In the Tools menu, click Person Management.

2. Click on the correct tab: Children, Staff, Non-Staff.

3. Click Add.

4. Enter all required information about the person.

5. Click Save to save or click Save & New to save and open a new form to continue adding new person records.

Merge Duplicate Records

Merging two names will move all incidents from the "Child/Staff/Non-Staff to Delete" to the "Child/Staff/Non-Staff to Retain."

1. Check the Active, Inactive, and Archived filter boxes to display all person records associated with the EC-SWIS account.
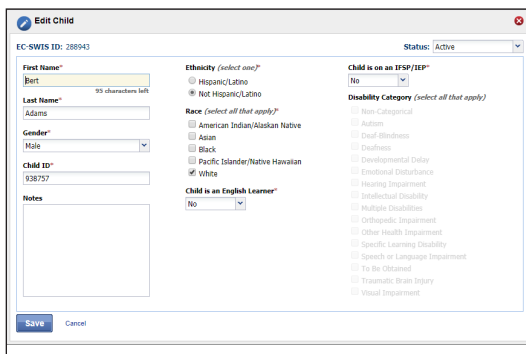
2. Locate the name of the person to be retained by typing the name in the Search field.

3. Click the Search icon.

4. Click to select the name of the record to retain.

5. Click Merge.

6. In the Child/Staff/Non-Staff to Delete field type the name of the person record to delete. All incidents from this record will be moved to the Child/Staff/Non-Staff record chosen to be retained.

7. Click to select the name of the record to delete.

8. Click Merge.

Revise a Record

1. In the Search field, type name of the record to modify.

2. Click the Search icon.

3. In the result set, double click on the record to revise.

The Edit Child workspace.

4. Revise the necessary information.

5. Click Save.

Delete a Record

1. Type the name of the record to be deleted in the Search field.

2. Click the Search icon.

3. Click to select the record to delete

HERE'S A TIP

The SWIS Suite prevents deleting person records attached to incident data. If there are duplicate person records and each has incident data, merging the two records is recommended over deleting.

4. Click the Delete button.

5. Click Delete to confirm. Click Cancel to return to the roster.

Update a Record Status

1. Check the Active, Inactive, and Archived filter boxes to display all persons associated with the EC-SWIS account.

2. Type the name of the record to update in the Search field. Click the search icon.

3. Right-click on the record and select Set Status. Select the appropriate status for the record:
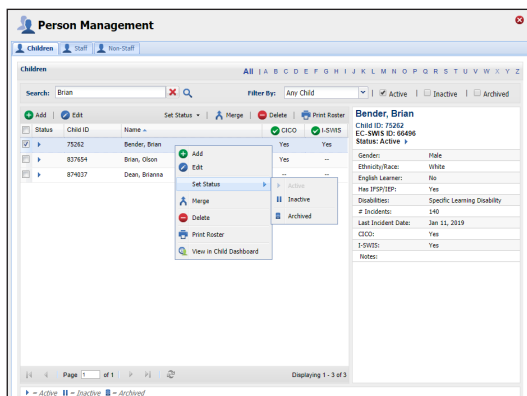
The Person Management workspace with Set Status menu.

- **Active:** the person is currently associated with the program.

- **Inactive:** the person is not currently associated with the program, but may return (e.g., children with parents on sabbatical).

- **Archived:** the person is not currently associated with the program and will not be returning (e.g., children transitioning to kindergarten).

Update Multiple Records

Multiple person records may be selected within the same page to update to the same status all at once. To update multiple records with one click:

1. When the Person Management list opens, scroll to the page with multiple records to update.

2. Check the box to the left of each record to update.

3. Click the Set Status button located at the top of the list.

4. Select the appropriate status for the records.

Tools – Data

Data Integrity

To access the Data Integrity system:

1. From the EC-SWIS Dashboard click Tools.

2. Click Data Integrity.

The Summary at the top of the report identifies the number of possible errors within the account in each record type. Below the Summary are two columns. Good Data lists the record types without identified errors. Problematic Data lists each record type with an itemized list of possible errors. The full report checks for the following:

- Any staff, non-staff, or children **missing district ids**

- **Duplicate** staff, non-staff, or child records

- Staff, non-staff, or children with **duplicate district ids**

- **Duplicate incidents**

- Incidents **out of date range** (incidents before 1997 or with future dates)

- Incidents **out of time range** (based on the Time Range setting established in School Settings)

- **Missing or incomplete School Days data**

- **School Days data out of range** (months with more days than possible weekdays)

- **Missing/Incomplete Program Enrollment data**

- **Program Enrollment data out of range** (greater than 2500 children)

- Children with a **Disability Category marked as To be Obtained**

- Children on an IFSP/IEP with **no Disability identified**

- **Inactive/Archived children enrolled in CICO-SWIS**

- **Inactive/Archived children in I-SWIS** with open files

To correct any of the records listed in Problematic Data:

1. Double-click the record to correct.

2. Correct the information.

3. Click Save.

Child Dashboard

The Child Dashboard provides program personnel with a comprehensive report for an individual child with data in EC-SWIS, CICO-SWIS, and/or I-SWIS.

To access the Child Dashboard:

1. Click Tools, then Click Child Dashboard.

2. Double-click the child record to select a child to view from the Select a Child list.

3. The Child Dashboard opens with data from the current school year.

4. Select another year from the drop-down menu located next to the child's name to display data from previous school year.

Note: CICO-SWIS data will not appear in the Child Dashboard when previous years are selected.

Child Dashboard reports include:

- Summary
- Latest Incidents—the child's 10 most recent incidents.
- Incidents Per Year
- Incidents By Motivation
- Incidents By Time
- Incidents By Problem Behavior

- Incidents By Activity
- Incidents By Day Of Week
- Average Incidents Per Day Per Month
- CICO-SWIS Individual Student Count (if program uses CICO-SWIS and the child has data)

Tools – Support

As questions come up about how to use EC-SWIS, it is recommended to refer to the PBISApps Support page for the answers. Access the Support page by clicking Support under the Tools

menu. The page will open in a new tab. Search the page for answers to your frequently asked questions.

Tools – Invoice Details

The status of any SWIS Suite subscription and associated invoice is available in the section labeled Invoice Details located in Tools. From this section, you can view, print, and pay the invoice(s) associated with the program's subscription(s).

View, Print, or Pay an Invoice

1. From the Tools menu, click Invoice Details.

2. A window appears with all possible applications listed along the top with their current subscription status.

   - Green + ✓: Subscription is current and invoice is paid.

   - Yellow + !: Subscription is due and invoice is unpaid.

   - Red + !: Subscription is more than 30 days past due and invoice is unpaid.

   - Gray + ✗: No subscription

3. Click any of the invoice numbers listed on the left-hand side of the window to view a copy. *Note: Only invoices from the current subscription year will display in this section.*

4. Click Print to print a copy of the invoice.

HERE'S A TIP

A quick view of the subscription status is also available on any application's dashboard. The notification's color is an indication of the subscription's status:

- Yellow: Due
- Red: More than 30 days past due
- No Notification: Paid

5. Click Pay Invoice and the application opens a new window to the online portal to pay your invoice with a credit card.

Tools - User Management

A list of people with access to a program's SWIS Suite account is found in the User Management screen. To access User Management, click Tools then User Management.

Click a user's name to view additional details such as his/her:

- User name

- Access level to EC-SWIS, CICO, or I-SWIS

- Last time logging in to PBISApps

HERE'S A TIP
Hover your mouse over any column header in this screen to reveal an arrow. Click it to add columns to the default table view

Appendix A - EC-SWIS Data Entry and Reporting Schedule

School: _____ Facilitator: _____

Data Entry

Who	What	When
	Incidents	
	Accuracy Checks	

Report Generated

Who	What	When