

The I-SWIS Facilitator's Guide

August 2019

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Welcome to PBISApps: A Letter from the Director

Dear I-SWIS Facilitators,

Welcome! You are joining a community of over 30,000 PBISApps users who are making a difference in student outcomes in every U.S. state and territory and nine countries. I-SWIS is the most powerful and versatile individual behavior support application available. With this versatility comes far more opportunities for customization than in SWIS or CICO-SWIS. In I-SWIS, users can:

- Create an almost unlimited range of measures of fidelity and student outcomes
- Track behavior and academic progress, as related to IEP goals
- View individualized graphs with detailed plan change information instantly
- Upload key documents as part of student records

Therefore, your expertise will be needed to help teams to use I-SWIS to its full potential, and the information in this guide will help you. I thank you for the work you will do to improve outcomes for children, youth, and adults.



Kent McIntosh, PhD

What is PBISApps?

PBISApps is a not-for-profit group, developed and operated by faculty and staff at Educational and Community Supports (ECS), a research unit within the College of Education at the University of Oregon. ECS began in 1999 and continues to remain focused on the same mission: To implement practices resulting in positive, durable, scientifically validated change in the lives of individuals with disabilities and their families.

PBISApps is the maker of the School-Wide Information System (SWIS) Suite, PBIS Assessment, and PBIS Evaluation. Our applications have been implemented in more than 25,000 schools in the US and abroad. PBISApps has been making schools safer, more productive places for more than a decade by empowering educators to make data-driven decisions as problems emerge.

Our PBISApps Mission Statement

To support educators to create effective, equitable learning environments for all students by giving educators access to high quality data systems and training.

The Apps in PBISApps

The PBISApps team manages a series of online applications related to the implementation of multi-tiered systems of support (MTSS). These applications include: The SWIS Suite, PBIS Assessment and PBIS Evaluation.

PBIS Assessment

PBIS Assessment is an application for entering survey data related to a school's implementation of positive behavioral interventions and supports (PBIS). Surveys are completed online with reports immediately available as soon as the survey is submitted. The application makes it easier for teams to improve their PBIS implementation to benefit students, families, and the overall school culture. The best news about PBIS Assessment: It's totally free!

PBIS Evaluation

PBIS Evaluation is an online application combining data from the SWIS Suite and PBIS Assessment across all schools within a state, region, or district. The reports in PBIS Evaluation address the three most frequently assessed evaluation questions a state, region, or large district faces:

1. Which schools are actively engaged in PBIS implementation?
2. Are schools implementing PBIS with fidelity?
3. Is the implementation having an effect on student behavior?

By including data from the SWIS Suite and PBIS Assessment, users generate reports related to office discipline referral (ODR) rates, PBIS implementation criteria, and how all of these measures compare across schools within the district, region, and state.

SWIS Suite

The School-Wide Information System (SWIS) Suite is a set of four applications – SWIS, CICO-SWIS, I-SWIS, and SAMI. Each application is a place to collect, summarize, and use student behavior data to make decisions. SWIS focuses on the school-wide systems, CICO-SWIS on the targeted Check-In, Check-Out intervention, and I-SWIS on the individualized plans supporting students with more intensive behavior needs.

Research tells us educators make more effective, efficient decisions when they have the right data in the right form at the right time. The SWIS Suite provides school teams with the information they need to be successful decision makers.

What is I-SWIS?

I-SWIS – the I stands for Individualized – is the one place to find everything related to the individual student plans teams monitor. The web application gives teams the power to define the specific data they want to collect for each student they support, upload important documentation, and keep team members informed at all times.

Based on the data collection defined, I-SWIS automatically generates graphs so teams can make data-driven decisions in real time. Using I-SWIS, teams know whether student outcomes improve, whether other measures impact a student's success, and how adult behavior contributes to a student's overall improvement.

How Does I-SWIS Work With Your Existing Individualized Interventions?

Federal guidelines require schools implementing individualized support plans to keep record of every plan's documentation, stakeholders, and progress monitoring data. So often, teams report their current practices related to documenting a student's plan fall short of meeting those requirements. I-SWIS helps teams meet federal guidelines and encourages them to improve their practices.

Your Facilitator Role

I-SWIS facilitators coach teams how to use I-SWIS to drive decision making in their building. They serve as a local resource when schools want to start using I-SWIS, when they have application-related questions, or they need new users trained. Traditionally, facilitators work at a district-level to support more than one school; however, some facilitate just the school where they work.

Once certified as an I-SWIS facilitator, PBISApps recommends adding this certification and the responsibilities that come along with it to the facilitator's existing job description. Here are the bullet points to add:

- Implement I-SWIS in local schools
- Provide on-going support to I-SWIS schools
- Set up and train new I-SWIS users

- Coach teams on how to use I-SWIS data to drive decision making
- Maintain current expertise in the use of the I-SWIS application

Co-Facilitating

If there is more than one facilitator working with a school, it is possible to set up both facilitators with access to the school's I-SWIS account. Either the school's administrator, or the facilitator on record must send an email to accounts@swis.org requesting to add another facilitator to the account. Once added, both facilitators have access to the school's account when they log in to I-SWIS or to SAMI.

When You're Ready to Stop Facilitating

Jobs change. People retire. If and when there comes a time a facilitator no longer works with I-SWIS schools, PBISApps wants to know about it. Send an email to accounts@swis.org saying you no longer facilitate I-SWIS schools. Be sure to include who will take on those responsibilities for any school you used to support.

Support for Facilitators

Facilitators will not come away from training knowing every answer. Questions will come up. The PBISApps Customer Support Team is here to help along the way. They are available Monday – Friday, 7 AM-4 PM Pacific.

Contact PBISApps

- **Email:** Send an email from the Support section of our website – support.pbisapps.org
- **Call:** 855-455-8194
- **Fax:** 541-346-2471

Frequently Asked Questions (FAQ)

Answers to frequently asked questions are posted online at support.pbisapps.org. Whether browsing by topic, or searching for a specific question that came up for one user, there are not many questions left unanswered in FAQs. To find these

FAQs, go to support.pbisapps.org. If you can't find an answer, post a public question for others to find and respond to.

Direct Emails

Whenever there is a new feature, a set of bugs that have been fixed, or a scheduled downtime to announce, facilitators are the first to hear about it. PBISApps sends facilitators an email with all the information they need to support their schools. Often, these emails link to a news article with all of the little details and resources they can use to update users.

Quarterly Newsletters

Each quarter, PBISApps sends facilitators a newsletter containing important events, links to conferences where trainers will present, helpful SWIS Suite tips, and advice from colleagues on best practices in collecting and using behavior data to drive local decisions.

PBISApps Blog: Teach by Design

All CICO-SWIS facilitators will be automatically subscribed to our monthly blog space called Teach by Design. Through the Teach by Design blog, PBISApps transforms complex research into

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General

8 ARTICLES [VIEW ALL](#)

- [I am logged into the website but unable ...](#)
- [I forgot my username and/or password.](#)
- [How do I manage user accounts for SWIS a...](#)
- [As a facilitator, why do I get an error ...](#)
- [How do I find who is my SWIS facilitator...](#)

SWIS (School-Wide Information System)

55 ARTICLES [VIEW ALL](#)

- [What do I enter if a student's iden...](#)
- [I see a blank screen when I try to acces...](#)
- [How do I add users at my school?](#)
- [How are students who identify as Multi-R...](#)
- [How do I define the problem with precisi...](#)

CICO-SWIS (Check In, Check Out)

17 ARTICLES [VIEW ALL](#)

- [What is CICO-SWIS?](#)
- [Can we define different point cards per ...](#)
- [How do I develop a point card compatible...](#)
- [Who are the most appropriate people to t...](#)

I-SWIS (Individual SWIS)

6 ARTICLES [VIEW ALL](#)

- [I'm having trouble uploading a docu...](#)
- [What is I-SWIS?](#)
- [Can I setup my school with I-SWIS?](#)
- [Who attends an I-SWIS overview and what ...](#)

Contact Us

We're available 7 AM–4 PM Pacific, Monday–Friday

[Post a Public Question](#)

[Email Us](#)

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straight-forward solutions. Educators get the tools and strategies they need to make their classrooms more effective and equitable places where they spend more time teaching and less time negotiating student behavior. Every second Tuesday of the month, PBISApps comes out with a new article designed to help solve a common problem.

When a School Wants to Use I-SWIS

However it happens, there will come a day when a school gets in touch and says, “I want to get started with I-SWIS. Can you help?” What does a facilitator do when a school wants to use I-SWIS?

Readiness Requirements


Every I-SWIS school starts by making sure they meet nine requirements. These nine requirements ensure the foundation of the school’s systems works.

Teams: Who’s Paying Attention to Individual Students?

Schools track individualized plans in lots of ways. Some have one team monitoring systems and individual students, others have many individual student teams but no system-level monitoring, or maybe they one team implementing all three support tiers. To meet I-SWIS readiness, schools must monitor both the Tier III support systems as well as the individual student plans. Here is an example of each team:

Student Support Teams

A student support team is a group of people who know an individual student best – family members, classroom teachers, a behavior specialist, a reading specialist. Together, they review the student’s data and work with others to be sure the plan is executed the way it was designed. A representative student support team is the key to providing efficient and effective supports that

|  I-SWIS Readiness Checklist Individual Student Intervention System | | | | | |
|---|---|-------------------------------------|---------|-------------|------------|
| School/Facility: _____ | | Certified I-SWIS Facilitator: _____ | | Date: _____ | |
| I-SWIS Requirements | Data Source | Status | | | Next Check |
| | | Not in place | Partial | In Place | |
| 1. The school/facility administrator supports the implementation and use of Tier III interventions as well as I-SWIS. | Administrator Interview | | | | |
| 2. A support team(s) exists with training and support for Tier III interventions and reviews I-SWIS data at both the student and school/facility-wide levels at least twice monthly. | Team Roster & Meeting Schedule | | | | |
| 3. Coordinator(s) within the school/facility are willing to use parameters of student file set up and data entry within I-SWIS as they: a. Monitor the status of the system of support across individual interventions/students b. Manage student support teams/plans with I-SWIS data c. Set up and monitor I-SWIS student files d. Serve as a liaison between team, students, staff, and families e. Collaborate with I-SWIS Facilitator on I-SWIS user/team member training | Administrator/ Coordinator Interview | | | | |
| 4. The school/facility has or will build a clearly documented individual support system within three months of I-SWIS licensing. An Individual Support System includes procedures and materials for: a. Student identification and eligibility b. Training and ongoing communication with stakeholders (i.e., adults, students) c. Assessment d. Intervention planning e. Progress monitoring and decision making | Written Guidelines | | | | |
| 5. Data entry time and staffing are scheduled to ensure that I-SWIS data will be current to within three days at all times. Data entry staff have access to all necessary information (e.g., student records, team records). | Data Entry & Report Generation Schedule | | | | |
| 6. A small number of people within the school/facility are identified to gain I-SWIS access and are scheduled to attend a 3-4 hour Swift at I-SWIS Training conducted by a certified I-SWIS Facilitator. | Specific Date(s), Time(s), Location, Computers, Internet Access | | | | |
| 7. The school/facility agrees to maintain technology (i.e., internet browsers, district permissions) compatible with I-SWIS. | Administrator/ Coordinator Interview | | | | |
| 8. The school/facility agrees to both initial and ongoing coaching and support on the use of I-SWIS with a certified I-SWIS Facilitator. | Administrator/ Coordinator Interview | | | | |
| 9. The school/facility agrees to maintain I-SWIS readiness/compatibility. | Administrator/ Coordinator Interview | | | | |

Items that are Not in Place or Partially in Place can be organized into an action plan.

guide the student toward long-term success. These student support teams typically meet weekly or twice monthly.

System Planning Team

The system planning team is a group comprised of any staff member from the school involved in designing and implementing individualized, Tier III supports. In addition to specific teachers, and other school staff, this team typically includes behavior specialists, and the school's administrator. The system planning team monitors the health of Tier III supports across all staff and students. They use the Tiered Fidelity Inventory (TFI) to check in on fidelity, they develop minimum standards student support teams use as they review individual plans, and they allocate resources for training and materials. System planning teams must meet at least twice monthly.

[Subhead1]The Student File Setup Checklist

The Student File Set-Up Checklist helps teams translate parts of the student support plan into compatible I-SWIS terms. Some I-SWIS terms are unfamiliar and challenging to remember. Metrics, goal operators, calculated percent...they don't roll off the tongue. In establishing I-SWIS readiness requirements, it is important coordinators use the Student File Set-Up Checklist to align each case file with I-SWIS parameters.

The minimum requirements for every student case file in I-SWIS are:

- Basic student information
- Current team members
- Current assessment and student support plan
- At least one fidelity measure to review staff implementation
- At least one outcome measure of student progress toward their goals
- A data entry schedule to collect data at least twice weekly

The Student File Set-Up Checklist is available on the [*PBISApps website > Resources > I-SWIS Materials.*](#)

Which Students Benefit from More Support

Individualized, Tier III supports are the most resource intensive. No more than 5% of students typically receive this level of support in a school. Schools need to have clear written guidelines for how students become eligible for additional support.

Within the SWIS Suite, schools can use office discipline referral (ODR) patterns as well as Check-In Check-Out (CICO) data to inform their decisions about which students might need more. In October, teams should start reviewing the Referrals by Student report looking for which students have two or more ODRs. Research shows these students are more likely to end the year with more than six ODRs than other students in the building. Students who consistently struggle to meet their CICO goals should be discussed as to whether they need a different targeted intervention or more intensive supports.

The Technical Assistance Center for Positive Behavioral Interventions and Supports has additional resources available to help schools identify which students would benefit from Tier III support. Head to [*pbis.org > School > Tier 3 Supports > Screening/Identification of Students Needing Tier III Supports.*](https://pbis.org)

Setting Up a New Account

When a school meets all nine readiness requirements, it's time to set up their I-SWIS account. All it takes is a signed license agreement and PBISApps takes care of the setup. When the I-SWIS account is live, facilitators get an email letting them know the school is ready to go!

Filling Out and Signing the License Agreement

The license agreement is a legal document between the school and the University of Oregon. It describes what the application is, how it is to be used, and who is responsible for maintaining it. The most current version of the SWIS Suite license agreement is available on the PBISApps

website under *Resources > User Guides and Materials > I-SWIS Materials*. It opens as a .zip file with two documents inside: the License Agreement and the Signature Page. Please send the signature page only to PBISApps to set up the account; keep the full license agreement for personal records.

Because handwriting varies in legibility, fill out required fields on the signature page electronically. Those without an electronic signature are free to print out the completed signature page and sign the form by hand.

There are three places for signatures on this form:

Licensee: Anyone with the authority to sign legal documents on behalf of the school may sign the SWIS Suite license agreement as a licensee. Most typically, this person is a building-level, or district-level administrator. Verify and adhere to the local policies and procedures.

Data Sharing Agreement (Optional): The same person signing the licensee field has the authority to sign the data sharing agreement as well. Schools opting to share data allow their SWIS Suite data to be shared for the following purposes:

- **Educational research used to identify and inform best practices.** Data used for research purposes are stripped of identifying information including student, staff, and school names and id numbers.
- **PBIS Evaluation use.** This application allows subscribing district-, regional-, or state-level evaluation teams to generate aggregated reports using SWIS Suite and/or PBIS Assessment applications.

Facilitator: Only certified SWIS Suite facilitators have the authority to license an I-SWIS school. The facilitator's signature verifies the school meets all readiness requirements to use the application.

Where to Send the Signed License Agreement

There are three ways to send in the completed signature page to PBISApps:

- **Email:** accounts@swis.org
- **Fax:** 541-346-2471
- **Mail:** PBISApps
Attn: SWIS Accounts Manager
1235 University of Oregon
Eugene OR 97405-1235

HERE'S A TIP

Before you send us the school's agreement, take one last look over the form to be sure you haven't missed a field. Any missing information could cause a delay in the setup time. Remember – our I-SWIS Accounts team is fast, but some times of the year are busier than others. Please allow two weeks from the time you've submitted the form to the time the account is activated.

I-SWIS Subscriptions

Schools subscribe to I-SWIS on a yearly basis. Subscription years run from September 1-August 31 each year, regardless of when the school initially signs up. Here is how billing works for I-SWIS subscriptions.

All prices are per school (regardless of size), per year. SWIS Suite subscription fees are prorated by the month throughout the year. Subscription fees are not prorated for partial months. For example, schools adding I-SWIS on November 1st will be invoiced the 1-app base rate prorated from November. Schools adding I-SWIS November 2nd will be invoiced the 1-app base rate prorated from the next full month – December.

Discounted rates are available for sets of schools purchased together by a single payer on a single invoice. Bundled discounts are available for any school purchasing more than one application at the initial point of purchase. Applications purchased one at a time throughout the year are each billed at the prorated 1-app rate. All applications initially purchased a la carte will be renewed at bundled rates.

| # of Schools on Same Invoice | Purchase One Application | Purchase Two Applications | Purchase Three Applications |
|------------------------------|--------------------------|---------------------------|-----------------------------|
| 1-19 Schools | \$350 | \$460 | \$570 |
| 20-39 Schools | 10% Discount (\$315) | 10% Discount (\$414) | 10% Discount (\$513) |
| 40+ Schools | 20% Discount (\$280) | 20% Discount (\$368) | 20% Discount (\$456) |

If a school is unable to log in to their I-SWIS account, and they suspect payment could be the issue, please contact the PBIS-Apps Customer Support team. They will work with the school to make a plan toward reactivating their account as efficiently as possible.

More information about pricing is available on www.pbisapps.org by going to [Applications > SWIS Suite > Get I-SWIS > More Pricing Information](#). For specific questions on invoicing or pricing, please contact the PBISApps Support team at accounts@swis.org.

How to Pay

Any invoice can be paid with a check or credit card. Credit card payments can be made online by visiting the Pay Invoice link at the top of PBISApps.org. Credit card information cannot be taken over the phone.

Checks are made payable to the University of Oregon.

HERE'S A TIP

If a purchase order number is part of the school's process, please send it and we will note the information on your account. We are unable to accept POs as final payment for the subscription. If payment has not been received by the suspension notice, the school's account may be suspended for non-payment.

Late Payments

All subscription fees are invoiced with payment terms of net 30 days. Invoices unpaid after 30 days will receive a first notice of past due payment. After 60 days, PBISApps sends a second notice of past due payment. Unpaid subscriptions will be suspended after 90 days pending receipt of payment. Every SWIS Suite account's payment status is available within the SWIS suite.

Renewal

There is nothing a school needs to do to renew a I-SWIS subscription. All I-SWIS subscriptions renew automatically on September 1. Preparations for renewal start over the summer. Facilitators will be contacted with a request to review and update contact and billing information for the schools they support, ensuring the renewal invoice gets to the right place. If a school wants to add an application to their subscription, and they want to get the bundled rate, get the signed license agreement for the new application submitted to PBISApps no later than July 1. License agreements received after that date will be billed at a la carte pricing.

The email prompting updates to billing information is also a good opportunity to notify PBIS-Apps if any school chooses not to renew its subscription for the coming school year and would like to cancel.

All invoices for renewed subscription go out on September 1. Billing contacts should expect to see invoices show up in the mail 3-5 days later.

I-SWIS Users

Each I-SWIS user should have clearly defined responsibilities and regularly allocated time to complete their tasks within the application. Figuring out who should have which access level in the I-SWIS application is something facilitators work out with the school's team. Training the right users from the beginning reduces confusion and frustration down the road.

There are three access levels to the I-SWIS application, and four access levels to each student file:

I-SWIS User Access Levels

| Action | Coordinator | School-wide Read Only | User (Student Specific)* | | |
|--|-------------|-----------------------|--------------------------|-----------|------------|
| | | | Full | Read Only | Data Entry |
| View I-SWIS Dashboard | • | • | • | • | • |
| Setup New Student Case File | • | | | | |
| Add/Edit Student Case File Measures & Members | • | | • | | |
| Add/Edit Student Case File Documents | • | | • | | • |
| Enter Data | • | | • | | • |
| Generate School-Wide I-SWIS Reports | • | • | | | |
| Generate Student Reports | • | • | • | • | • |
| Edit All School Settings <i>No access to Enrollment/School Days</i> | • | | | | |
| Edit Person Management | • | | | | |
| Generate Student Dashboard | • | • | | | |
| Generate Data Integrity Tool | • | • | • | • | • |
| Resolve Data Integrity Errors | • | | | | |

*There is a fourth user access level, "No Access," that has no privileges.

The Coordinator Role

A member of every student's support team is a coordinator who serves at the team's lead and knows how to measure and monitor the student's progress. The coordinator has the highest level of access in I-SWIS. They set up case files based on each student's support plan as well as the team's reporting needs. They set up team members who need access to the student's information in I-SWIS and provide these members with the training they need to use the application. Schools may set up as many coordinators as they have people managing individual student cases in their building.

Co-Coordination

I-SWIS allows one coordinator per student case file. If a school utilizes more than one coordi-

nator to support the students receiving Tier III supports, here are the steps to get everyone the access they need:

1. The I-SWIS facilitator sets up each coordinator at the school with Coordinator access using SAMI. See Add a New User in the SAMI Manual on page 28.
2. The school then determines which of its coordinators will set up the student's file in I-SWIS.
3. That coordinator adds the additional coordinators as members of the student's support team with full access to the student's file.

Transferring Coordination

Schools can transfer active student files from one coordinator to another in the building at any time. Here's how. From the Student File:

1. Click Team Members.
2. Click Assign Coordinator.
3. Select a coordinator from the list of identified coordinators. Note: If there are no additional coordinators listed, an error will appear here asking the school to contact their facilitator to set up a new coordinator.
4. Click Assign.

Transferring a student's file to a new coordinator removes the previous coordinators access. If the previous coordinator needs to keep access to the student's file, simply add them as a member of the student's support team.

HERE'S A TIP

If a student's coordinator leaves the school and is not available to transfer case files, the I-SWIS facilitator has the authority to reassign a case file to a new coordinator.

Swift at I-SWIS

School users benefit from training and coaching to build their fluency in the application. Facilitators are the best people to provide the information and resources each user needs to be able to get the most out of their I-SWIS account. The training facilitators provide to these two types of users is called Swift at I-SWIS. All school staff who receive Coordinator or School-Wide Read Only access to I-SWIS will need to attend the Swift at I-SWIS training.

There is a folder called Swift at I-SWIS available in [Resources > I-SWIS Materials](#) on the PBISApps.org website. The folder contains PowerPoint presentations, electronic case files for two demo students, and printable participant handouts to guide facilitators through delivery of the Swift at I-SWIS training.

Swift at I-SWIS topics include:

- Introduction to I-SWIS
- Data-Based Decision Making using I-SWIS data
- Roles & Access within I-SWIS
- Account Set-Up Tools in the SWIS Suite
- Student Case File Set-Up in I-SWIS
- Team Members and Documents in I-SWIS
- Fidelity and Outcome Measures in I-SWIS
- Entering case file data into I-SWIS
- Basic Reporting & Analysis
- I-SWIS School-Wide Reports & System-Level Planning

Facilitators conduct Swift at I-SWIS trainings in a variety of ways. The standard model is to provide the training in-person to one school at a time. Training takes about 3-4 hours per school to complete. Make sure wherever the training occurs, each user has access to:

- I-SWIS User's Manual – either printed or online under [Resources > User Guides and Materials > I-SWIS User's Manual](#).
- PBISApps homepage: www.pbisapps.org
- I-SWIS Demo Account for School-Wide Reporting features
- Facilitator Training Account for case file set up and data entry purposes
- Swift at I-SWIS Activity Packet also in [Resources > User Guides and materials > I-SWIS View All Materials](#)
- Electronic demo student case file documents

Variations from the standard Swift at I-SWIS training that work well include:

- Offering separate trainings for each user role (i.e., all coordinators, all School-Wide Read Only users)
- Training users from multiple schools in a single session
- Scheduling a full training day with a few shorter sessions for different audiences:
 - Session 1 (30 min): Overview of I-SWIS given to all staff
 - Session 2 (45 min) Case File Navigation and Reporting features given to those who will have access to I-SWIS
 - Session 3 (120 min) Setting Up Case Files in I-SWIS given to only Coordinators and School-Wide Read Only users
 - Session 4 (90 min) Using I-SWIS to inform student-level and system-planning level decisions at Tier III
 - Session 5 (90 min) Work session to design and set up real student case files in I-SWIS given to Coordinators only

Regardless of the model, complete Swift at I-SWIS training before users receive access to their accounts.

Adding New Measures and Updating Old Ones

When it comes to types of data to collect in I-SWIS, teams are limited only by their imagination. Every measure established in I-SWIS is customized to each student plan. With that level of variety, it can be overwhelming to think about where to start. Here are some tips for helping teams get started.

Choosing a Metric Type

There are five ways to collect data and summarize them in reports. Each of these ways is called a ‘metric’. Understanding what each metric does and when to use it is the key to adding new measures that let teams make good decisions. Here are the metrics available in I-SWIS and examples of when to use them.

Percent

This one is straight forward: Use this metric when you want to enter a percent between 0-100%. Percentages less than 0% and more than 100% are not allowed.

When to Use It: When the student’s data will be entered as a percent. For example: test scores from computerized exams or estimates of the percent of time the student was engaged in class. *Note: If data entry personnel would have to calculate the percentage before entering it, skip the Percent metric in favor of a Calculated Percent.*

Calculated Percent

With this metric, I-SWIS does the math for you. Enter the number of things a student did out of the possible number of things they could have done. The application calculates the percentage for you.

Option to Set: When setting up a measure using a calculated percent, teams choose to set the maximum number of possible things or to let users set the number of possible things per day. If teams don’t know whether the maximum number of possible things will change from day to do, select the Variable Max option.

When to Use It: When tracking the number of times a student does something, but teams want to report it as a percent. For example: the number of tasks completed independently out of the total number of tasks presented, number of minutes away from instruction out of the total length of the class period. *Note: Using the variable max option makes this metric flexible enough to accommodate those times with the total number of attempts is different on different days.*

Point/Count/Duration

Enter the number points a student earned, or a count of something they did, or an amount of time they spent doing something.

Option to Set: If teams plan to add time segments, they can choose for I-SWIS to total up the points or to average them out over the course of the day.

When to Use It: When entering a total number. For example: total number of minutes spent in transition from lunch to recess, number of books checked out during a library visit. *Note: Because the amount of time a student has to do something can fluctuate, teams taking advantage of the Point/Count/Duration metric should make a note whenever a student has significantly more or less time to track this measure. This alerts the team members to one reason for large discrepancies between days.*

Scale

Set up a scale with a minimum (no lower than 0) and a maximum (no higher than 9).

Options to Set: Teams can choose to add labels for each option along the scale. They can also select to report the number selected on the scale, or to report that number as a percent of the scale. For example, if the minimum on the scale is 0 and the maximum is 5, when the student scores a 4, the application can either report a 4 for the day, or as 80% of the total scale.

When to Use It: When tracking the intensity or range of a behavior. For example: intensity of a student’s physical aggression on a scale of 0 to

4 (0=no physical aggression, 4=5+ incidents of physical aggression), student task completion from 0 to 3 (0=no tasks completed, 3=all tasks completed and turned in).

Rate

Enter the number of times a student did something in a given amount of time. To set up the metric:

1. Enter the name of the thing to count in the field labeled Sample.
2. Next, choose whether the thing is counted in terms of seconds, minutes, hours, or days.
3. Set the default amount of time you'll usually observe the student doing that thing.

When to Use It: When tracking how many times a student does something within a specific amount of time. For example: How many times does a student raise their hand to comment in an hour period?

How Time Segments Work

Most schools utilize time segments when they collect data at specific times of the day and need to record those data separately from each other. The most notable example of this is a point card where a student earns points during different class periods. In this case, setting up each class as its own segment allows teams to analyze a student's progress in individual classes. Time segments are not limited to times of the day. Teams could use time segments to add steps in a routine the student needs

to follow, expectations a student needs to meet throughout the day, or any number of categories within a single measure teams want to track separately from each other. To see other ways to use time segments in I-SWIS, check out the Example Measures section of this manual.

Templates For Measures You Might Use in Your School

While individualized supports are unique to each student, schools use some interventions similarly. The benefit of using I-SWIS is, teams can track all aspects of a student's individualized plan – including some Tier II interventions they aren't able to capture in CICO-SWIS. Here are two templates for Tier III supports, and one template for a Tier II intervention schools can use to set up these measures quickly in I-SWIS.

Individualized Point Card

Many interventions rely on students earning points throughout the day. The example below sets up the following point card in I-SWIS. The tasks along the top are the expectations the student works on. The student can earn up to three points per period for a total of 15 points possible for each task for the day.

| Class/Activity | Hands and feet to self | | | | Finish my work | | | | Follow break routine | | | |
|---------------------|------------------------|---|---|---|----------------|---|---|---|----------------------|---|---|---|
| 1. | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 |
| 2. | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 |
| 3. | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 |
| 4. | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 |
| 5. | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 | 0 | 1 | 2 | 3 |
| Total Points Earned | | | | | | | | | | | | |
| Notes | | | | | | | | | | | | |

Setting up the point card this way makes the data entry in I-SWIS look this way.

1. The tasks established in Time Segments appear here.
2. The maximum points possible appears here entered by default. Because we set the maximum to be variable, we can change it by clicking the arrows up or down.
3. The application automatically calculates the percentage for each task based on the number of points earned. The Time Segment Report displays the average percent earned for each task.
4. I-SWIS calculate the percent of points earned for the whole day, here. The Measure Report displays this average for each day.

Individual Point Card with BrB (Lower grades)
(Calculated Percent)

Scheduled
◀ 9/27/18 | 10/1/18 ▶

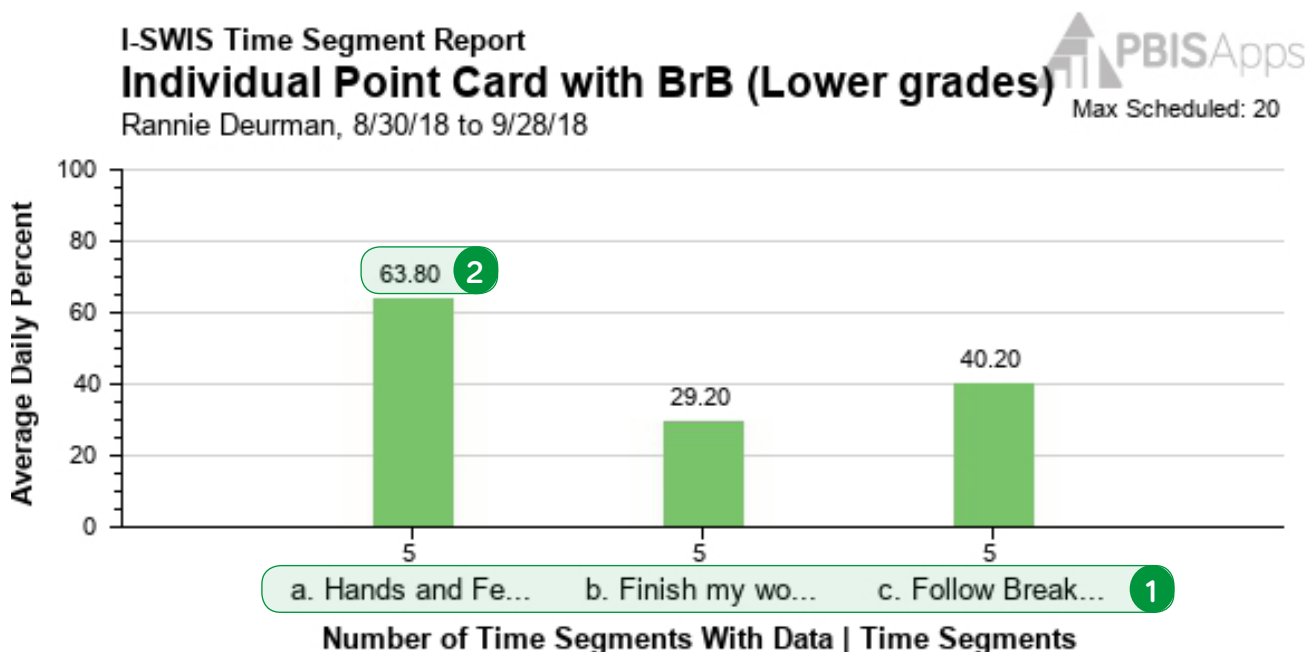
Student Status: Present

Average: % 4

| Time Segment | Status | Earned for goal | Possible for goal | |
|-----------------------------------|---------|-----------------|-------------------|-----|
| a. Hands and Feet to Self | Present | | 15 | = % |
| b. Finish my work | Present | | 15 | = % |
| c. Follow Break Routine if needed | Present | | 15 | = % |

This is the Time Segment Report for this measure.

1. Our Time Segments appear here.
2. The number at the top of each bar is the average percent of points the student earned during these 30 days.



This measure looks like this when teams go to enter data in I-SWIS.

1. Time Segments appear here.
2. The maximum class time appears here. Setting up the measure with a variable max allows the option to set the Reading period to 30 minutes long while all the other periods are 45 minutes.
3. The application calculates the percent of the day lost due to the student's misbehavior here.

Missed Instruction Time
(Calculated Percent)

Scheduled

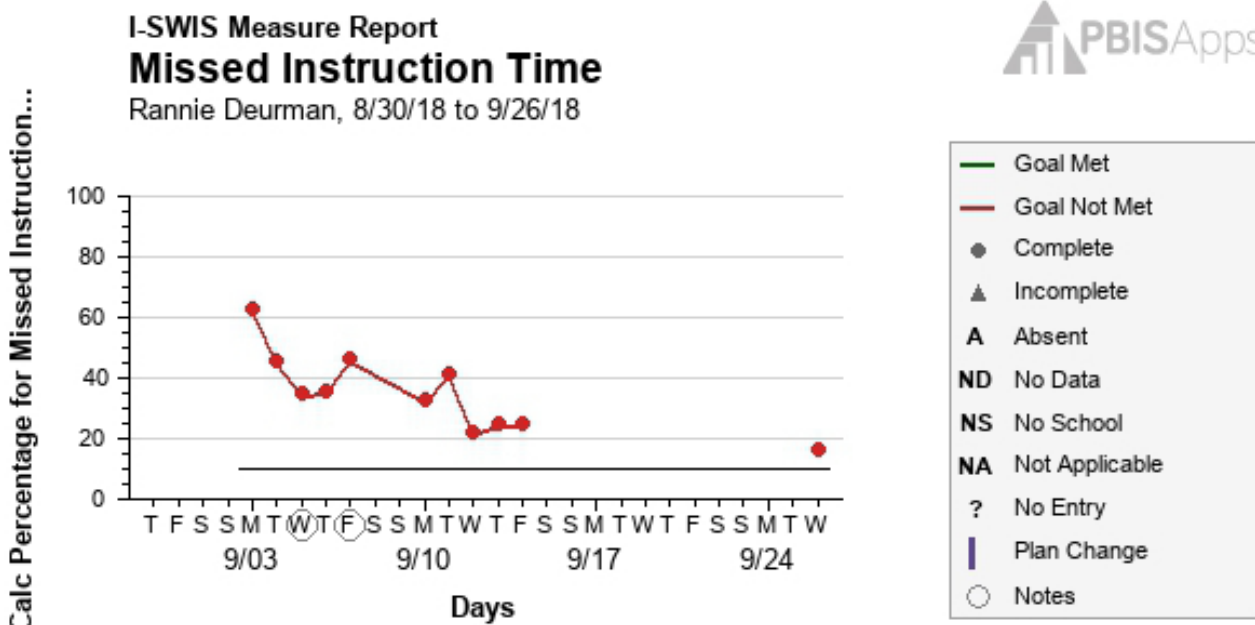
9/27/18 | 10/1/18

Student Status: Present

Average: 13.89 %

| Time Segment | Status | Missed Minutes | Class Period Minutes | |
|--------------------------|---------|----------------|----------------------|--------|
| a. Math | Present | 0 | 45 | = 0 % |
| b. Reading/Language Arts | Present | 10 | 30 | = 33 % |
| c. Social Sciences | Present | 0 | 45 | = 0 % |
| d. Science | Present | 10 | 45 | = 22 % |

The Measure Report looks something like this:

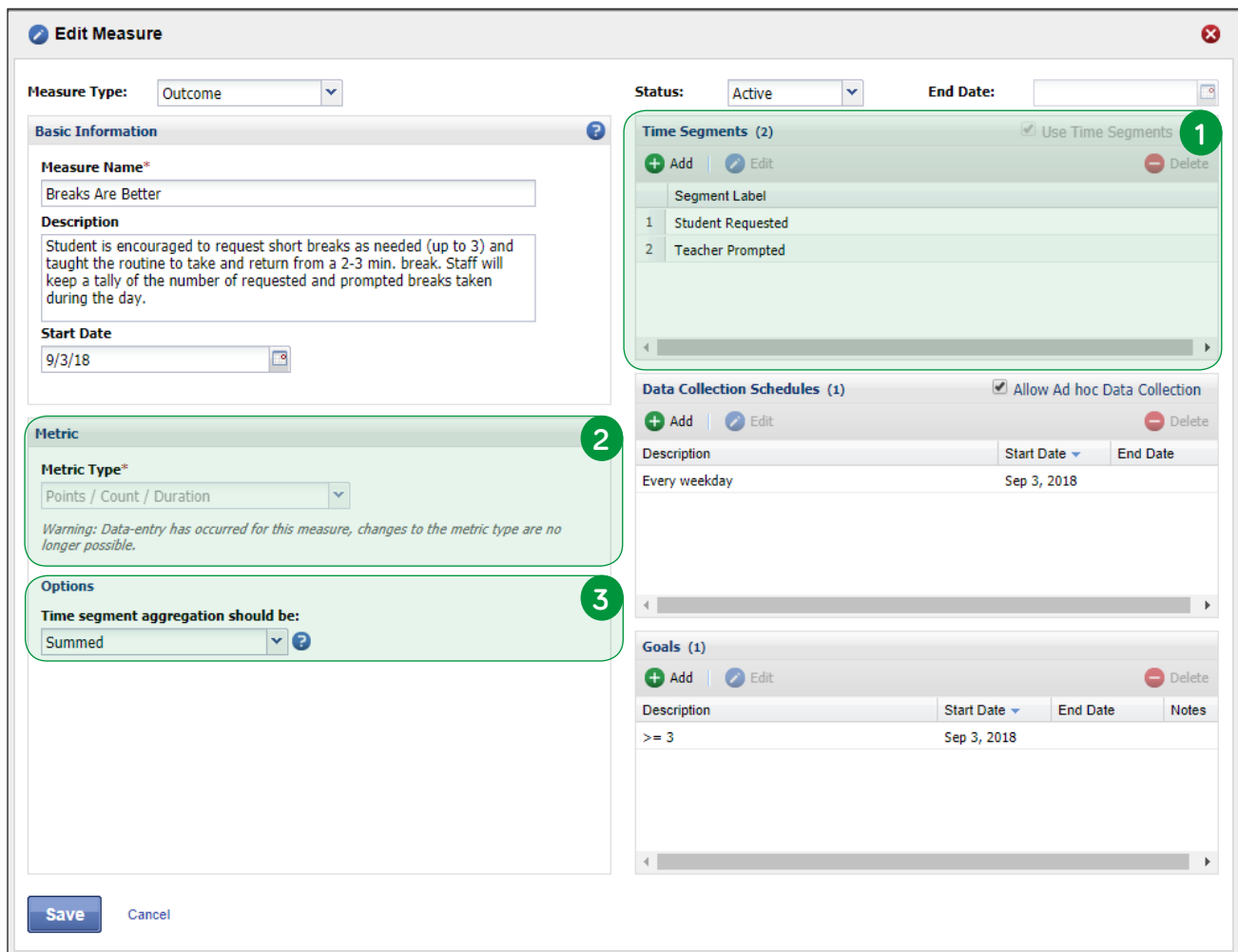


Breaks Are Better

It's easy to think of I-SWIS as an application to track only Tier III supports. Often, schools need a way to track a tailored Tier II intervention as part of a student's individualized plan. I-SWIS offers a way to do just that.

Breaks are Better is a Tier II intervention that builds on the CICO intervention. Students continue to participate in CICO earning points on a card related to school-wide expectations. They also have the option to ask for regular breaks during the period as they need them. Below is how teams set up this measure in I-SWIS.

1. Because the team tracks this student's CICO data in CICO-SWIS, the only component to add in I-SWIS are the number of times the student asked for a break and the number of times the teacher prompted the student for a break. These become the segments.
2. The number of breaks a student took is a straight count. Creating this measure with a Point/Count/Duration metric lets the team enter the number of breaks right into the application.
3. The option to sum the number of breaks ensures the application calculates a running total for the day.



Edit Measure

Measure Type: Outcome

Status: Active End Date:

Basic Information

Measure Name*: Breaks Are Better

Description: Student is encouraged to request short breaks as needed (up to 3) and taught the routine to take and return from a 2-3 min. break. Staff will keep a tally of the number of requested and prompted breaks taken during the day.

Start Date: 9/3/18

Metric

Metric Type*: Points / Count / Duration

Warning: Data-entry has occurred for this measure, changes to the metric type are no longer possible.

Options

Time segment aggregation should be: Summed

Time Segments (2)

Use Time Segments

| Segment Label |
|---------------------|
| 1 Student Requested |
| 2 Teacher Prompted |

Data Collection Schedules (1)

Allow Ad hoc Data Collection

| Description | Start Date | End Date |
|---------------|-------------|----------|
| Every weekday | Sep 3, 2018 | |

Goals (1)

| Description | Start Date | End Date | Notes |
|-------------|-------------|----------|-------|
| >= 3 | Sep 3, 2018 | | |

Save Cancel

Setting up the measure makes data entry look like this.

1. The segments appear here.
2. The number of breaks the student requested and teacher prompted gets entered here. There is no minimum or maximum number of breaks a student could request.
3. I-SWIS keeps a running total of breaks here.

Breaks Are Better
(Points / Count / Duration)

Scheduled: 9/26/18 | 9/28/18

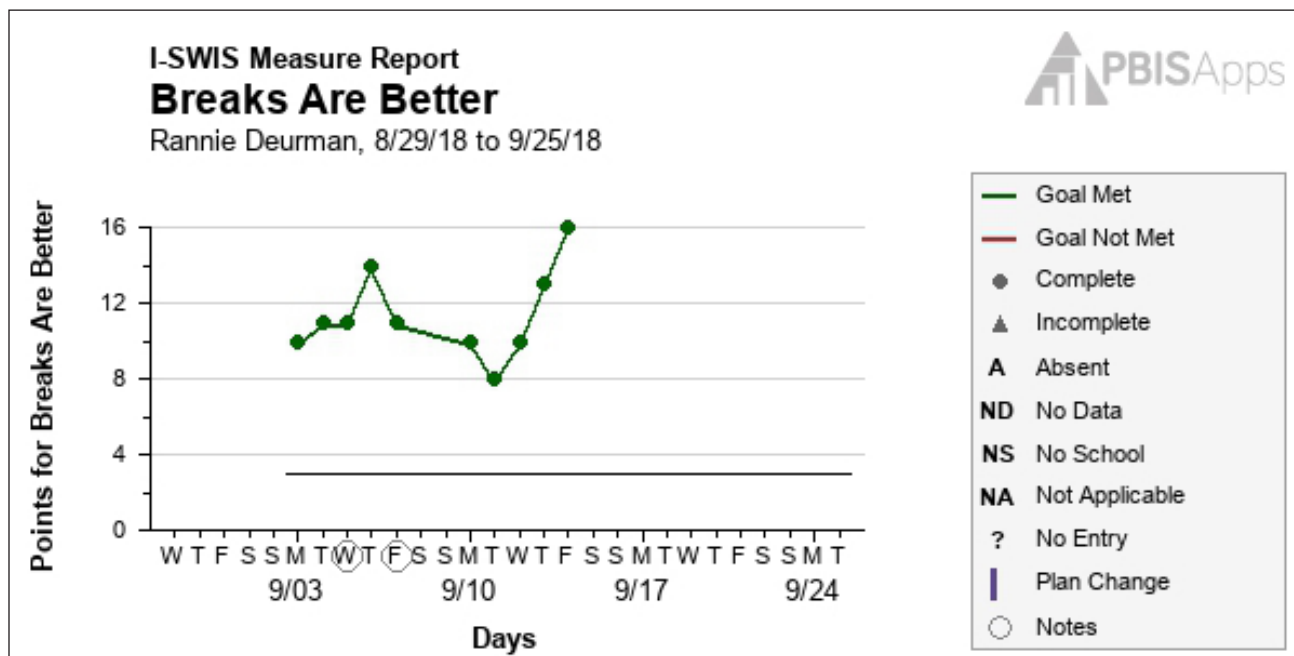
Student Status: Present

Total: 10 (3)

Time Segment (1)

| Time Segment | Status | Points / Count (2) |
|-------------------|---------|--------------------|
| Student Requested | Present | 5 |
| Teacher Prompted | Present | 5 |

The measure report displays the running total number of breaks the student took for each day:



Editing a Student's File

Student plans never stay the same. Teams regularly review student data in I-SWIS and make adjustments to accommodate the student's current status. As changes take place, teams need to update I-SWIS to reflect these adjustments.

To Edit or Upload a New One?: Working with Documents in I-SWIS

Student plans come with documentation. That documentation gets revised throughout the year, all the time. When changes happen to a student's behavior support plan or assessment, is it better to upload a new document or can teams revise documents without losing the history? They can do both!

Revise a Document and Keep Previous Versions

When teams make adjustments to a plan and want to keep previous versions for historical purposes, it's best to upload and save a new version of the document. I-SWIS accommodates this easily.

From the Student File Dashboard:

1. Click Assessments/BSP/Documents.
2. Click to select the file to be updated.
3. Click Add Version.
4. Select the new version from the file's location.
5. Click Save.

The new version appears to the right of the list of uploaded documents. Teams can download previous versions to see what elements were part of the student's plan before.

Add a New Document

When a student's plan incorporates new documentation, add it to their file in I-SWIS.

From the Student File Dashboard:

1. Click Assessments/BSP/Documents.
2. Click Add.

3. Type a title for the document in the title field. This should be clear enough to easily identify the document, but generic enough to upload additional versions later. For example: "Billy's BSP" works better than "Billy's BSP September 2018"
4. Click the Browse button next to the File field to locate the electronic file to be uploaded.
5. Select the type of file from the Type drop-down menu.
6. Click Save.

The Little Drop-Down at the Top: Update a Student's Progress

The School-Wide Report in I-SWIS only works when schools regularly indicate a student's progress in their plan. There is one place to indicate a student's progress, and it's in a non-descript, often overlooked, right-hand corner of the Student Dashboard shown on the opposite page.

Every student in I-SWIS progresses between five statuses. Here are some example definitions for these statuses:

- **Starting:** The first 2 weeks of a new plan or a major revision
- **Progressing:** The plan is implemented with fidelity and the student is on track toward meeting benchmarks.
- **Not Progressing:** Fidelity of implementation is low and student progress is low.
- **Needs Revision:** The student's plan needs to be revised.
- **Discontinued:** The student doesn't receive Tier III supports anymore.

Teams are encouraged to continually update this status for each student enrolled in I-SWIS in order to accurately reflect student progress in the School-Wide Report.



Coaching Data-Driven Decision Making

I-SWIS reports are where the magic happens. Here are some tips from PBISApps to help facilitators make the most of their time coaching teams to use I-SWIS data to make effective decisions.

I-SWIS Main Student File Data Entry View Reports Tools Clark Kent's Facilitator Sch...

► Rannie Deurman Implementation Status: Starting

Dashboard Student Assessments / BSP / Documents Measures Team Members

Student File for Rannie Deurman
Coordinator: Clark Kent Start Date: 7/3/17  

| Student File Summary | |
|-------------------------------|--------------|
| Description | Value |
| Assessment In Place | ✓ |
| Fidelity Data Last Entry Date | -- |
| Implementation Status | Starting |
| Outcome Data Last Entry Date | Sep 27, 2018 |
| Student File Status | Active |
| Support Plan In Place | ✓ |

| Measures (4) | | | |
|--------------|---|--------------|-----------------|
| Status | Name | Measure Type | Next Collection |
| ▶ | Breaks Are Better | Outcome | Sep 28, 2018 |
| ▶ | Fidelity | Outcome | Sep 10, 2018 |
| ▶ | Individual Point Card with BrB (Lowe... | Outcome | Sep 10, 2018 |
| ▶ | Missed Instruction Time | Outcome | Sep 27, 2018 |

| Assessments / BSP / Documents (2) | | |
|--|------------|-------------|
| Name | Type | Date Added |
| Behavior Support Plan | Plan | Oct 4, 2018 |
| Functional Behavior Assessment Summary | Assessment | Oct 4, 2018 |

| Team Members (4) | | | |
|------------------|-----------|---------------------|--------------|
| Name | Type | Team Role | Access Level |
| Anne Harrison | Staff | Classroom teacher | No Access |
| Clark Kent | Staff | Coordinator | Coordinator |
| Darren Kincaid | Staff | Behavior Specialist | Full Access |
| Rhonda Deurman | Non-Staff | Parent/mom | No Access |

Start with Fidelity

Checking in on a student's progress starts by asking how closely adults have implemented the plan: the fidelity of implementation. It is important to discuss fidelity data in the context of supporting adults, determining the plan's fit within the context, and identifying ways to modify the plan to improve the way staff implement these strategies.

If fidelity is high, then teams can attribute outcomes more confidently the plan. If fidelity is low, any problem solving the team does should also incorporate some action related to modifying

the plan or supporting staff who implement the plan to improve fidelity.

Maneuvering the Reports

The most common report type is the Measure report displaying a day-by-day account of a student's progress or fidelity of implementation. This report includes a graph with data points displayed for each day. On the days the student met or exceeded their goal, data points appear in green. Days where the student didn't meet their goal, data points appear in red. Tabs along the top let teams view notes or plan changes that happened during the time period they're looking at.

Teams can generate the Measure Report for one measure on its own or to compare two measures to each other. Comparing measures to each other is a nice way to create connections between different aspects of a student's plan. For example:

- Teams noticing a student hasn't met their goal related to asking for help may compare that measure with the fidelity of implementation measure. While

HERE'S A TIP

When fidelity is confirmed to be low, but outcomes are confirmed to be good, it may be that certain elements of the plan are optional and should not be measured as closely as the identified core or required elements of the plan.

low fidelity isn't always the reason a student struggles, it gives teams another piece of information as they problem-solve how to help the student succeed in the intervention.

- Compare a student's self-ratings about their own behavior with their ability to ask for help over the last week. This comparison may help shed some light on how the student feels which may shed light on their progress in another measure.

Drill Down to Segments

HERE'S A TIP

Adding fidelity as a comparison will almost always enhance understanding since the extent to which the plan is being used should theoretically impact the student's performance on all outcome measures.

If measures don't take advantage of time segments, there's only one report available: the Measure Report. Measures set up with segments get two additional reporting options helping teams drill down into the data and check out what's happening throughout the student's day.

Time Segment Report

This report displays an average for each segment across the date range. For example, let's say a student's data points hover around 80% in the Measure Report. Generating the Time Segment report shows most periods of the day average between 75% and 85%, but it also reveals morning recess averages around 60%. Wouldn't that team want to know more about what's happening at recess for that student?

Single Time Segment Report

When teams want to know more about a specific segment, they look to the Single Time Segment report. This report gives a day-by-day account – similar to the Measure report – ONLY for the segment requested. Using the recess example, the team would generate the Single Time Segment report for morning recess and discover the student struggles to improve behavior in this context and

staff frequently forget to record data for this period.

When You Want to Get Fancy: Comparing Multiple Reports in One Place

Some data analysts want to compare data from I-SWIS with other data sources (e.g., attendance, academics). That's possible using spreadsheet tools such as Excel or Google Sheets. Here is how:

1. Generate a report in I-SWIS.
2. Click the Print button.
3. Check the box next to Table(s).
4. Click Preview.
5. A formatted page appears with the data table.
6. Highlight the table
7. Copy and paste these data into the desired spreadsheet tool.

Once the report's data are pasted into a spreadsheet, analysts are free to build their own graphs.

How to Use SWIS with I-SWIS

A common error is for schools to discontinue reporting a student's behavior in SWIS when an individual support plan is in place. Only behaviors monitored separately in I-SWIS (often due to high frequency) should be excluded from SWIS data. Here are the ways schools can use SWIS to support their Tier III efforts:

Student Dashboard. The Student Dashboard displays the student's referral data. These graphs deliver important information about the time of day, location, and motivation behind the student's problem behaviors. This information is helpful with the assessment and development of a student's support plan as well as understanding the plan's impact on other behaviors.

Additional Behaviors & Actions Taken. SWIS allows a school to track multiple behaviors and actions in a single incident. For students receiving individual supports, more detail is really helpful. Encourage the student's teachers to report both a

primary as well as additional problem behaviors along with as many actions they took to resolve the incident.

Drill Down Tool. Using templates in the Drill Down Tool, teams can establish a cohort of students receiving Tier III supports. They can then generate reports in Drill Down specific to this group of students. To create a template, click Drill Down from the SWIS main navigation menus.

1. Click Students & Staff to expand the menu in Report Filters.
2. Double-click Students to open the Student Directory.
3. Hold down the Ctrl key and click to select the students receiving Tier III supports.
4. Click Select.
5. To add more students, click the blue pencil icon next to the Student's filter listed under Include in Dataset.
6. Click Save Report Template.
7. Enter a name for the template in the Label field.
8. Check the Share Template Within School option to make this template available to anyone with access to the Drill Down Tool. Leave it unchecked to restrict access to the user creating the template.
9. Click Save Template.

Drill Down templates are available within the Load Report drop-down menu at the top right-hand corner of the Drill Down workspace.

Check-In on Tier III Systems With the School-Wide Report

Some students receiving Tier III supports are also enrolled in Tier II interventions like CICO. As long as the student's point card matches the standardized point card used within the CICO intervention, utilizing CICO-SWIS to collect and analyze their data is fully appropriate. Here are the ways schools can use CICO-SWIS to support their Tier III efforts:

Student Dashboard. The Student Dashboard includes one report related to CICO: The Individual Student Count Report. This information is helpful with the assessment and development of a student's support plan as well as understanding the plan's impact on other behaviors.

CICO Reports. Use these reports just like any other student enrolled in the intervention. As teams discuss the student's progress in their Tier III outcomes, they should be sure to closely monitor how effective the CICO intervention is for the student as well as how that particular intervention interacts with the student's other outcome measures.

SWIS Account Management Interface (SAMI)

What is SAMI

The SWIS Account Management Interface (SAMI) is where facilitators manage their schools' contact and billing information, user accounts, as well as their own facilitator information. SAMI is only available to certified facilitators.

Log In/Log Out

From your preferred internet browser (e.g., Internet Explorer, Firefox, Safari, Chrome) type in the website address www.pbisapps.org to access PBISApps.

Once at PBISApps:

1. Click on PBIS Applications Login located in the black bar (app bar) at the top of the screen.
2. Enter the email address and password for the PBISApps account.
3. Click Login. (If the password is a temporary password, a prompt appears for a permanent password to be created.)
4. Once logged in, slide over to the left side of the app bar and click on SAMI to access SAMI.

To log out of PBISApps and the SAMI account:

1. Click the email address located in the app bar at the top of the screen.
2. Click Logout.

SAMI Main Workspace

Once logged into SAMI, the first screen is called the SAMI Main workspace. A list of schools the facilitator supports appears along the left side of the screen. The primary workspace enables after selecting a school from the list.

HERE'S A TIP

Any school you facilitate will appear on your school list in SAMI. School names struck through have been cancelled or suspended. All other schools displayed have at least one current SWIS Suite subscription. Click the name of the school to reveal the last date a user logged in to the account as well as applications to which the schools subscribes.

Update School Contact Information

Demographic information about each school displays in the School Info workspace, including:

- School Name
- Phone Number
- Mailing Address
- Fax Number
- Physical Address
- Website URL
- Grade Range

To access the School Info workspace:

1. Click the school name from the school list on the left side of the screen.
2. Click the Manage button to enable the primary workspace.
3. The School Info tab displays by default. Clicking School Info will also display the School Info workspace.

Request a School Name Change

If the school gets a new name or the name in your account is incorrect, make a request to PBISApps Support to change the name.

1. Click the Request Change button next to the School Name field.
2. Type the new school name in the New Name field.

3. Provide a reason for the requested change in the Reason for Change field.
4. Click Submit to send the request. Click Cancel to return to the School Info workspace.

Edit School Information

To update any of the other information listed in the School Info workspace:

1. Click the Modify button next to the field.
2. Update any information in the fields provided.
3. Click Submit to save the changes. Click Cancel to return to the School Info workspace.

Manage User Information

Each school has a set of users with different access to each application. As users come and go from the school, or someone forgets their password, facilitators have the ability to manage user access to the school's they support.

To manage user information:

1. Click the school name from the school list on the left side of the screen.
2. Click the Manage button to enable the primary workspace.
3. Click the Users tab to view a list of current users associated with the school's SWIS Suite account.

The list displayed includes the user's name, their username, the last time they logged in, and which applications they can access. The facilitator's name does not appear on this list. Facilitators have full access to any SWIS Suite account listed in their SAMI school list.

Add a New User

Facilitators can add new users to a school's SWIS Suite account from the Users workspace. To add a new user, from the Users workspace:

1. Click the Add User button.
2. There are two ways to search for an existing record for the new user:
 - a. Enter the user's email address in the Username (Email) field to search for existing accounts with

that email.

- b. Click the Staff List button to select an existing school staff member. Click to select the staff member if present on the staff list.
3. Click Submit.
4. Fill in the required information fields displayed in the User Form.
 - a. The password entered is a temporary password. When the user logs in with it the first time, the application will prompt to create a permanent password.
 - b. Check the Is School Staff box if the person is employed at the school. Leave it unchecked if not.
 - c. Select the Access Level to the school's SWIS Suite applications. No Access is selected by default.
5. Click Submit

HERE'S A TIP

If your initial search in step 2 of adding a user returns an existing account associated with that email address, there are only two fields you need to update.

- **Is School Staff checkbox:** Check this box if this user should also appear on the school's staff list. Leave it unchecked if it should not.
- **Access Level:** Select the access this user should have to the school's account.

Edit an Existing User

There are many reasons to edit a user's information:

- Name Change
- Forgotten Password
- Email Change
- New Access to an Application

To edit any existing user at a school, from the Users workspace:

1. Locate the user to edit from the User Account list.
2. Click the pencil icon located in that same row.

3. Edit any field. Note: When changing a password, the password entered is a temporary password. When the user logs in with it the first time, the application will prompt to create a permanent password.
4. Click Submit to save the changes. Click Cancel to return to the Users workspace.

Remove a User

If a user no longer needs to access the school's SWIS Suite account for any reason, remove them from the User Accounts list. To remove a user's access, from the Users workspace:

1. Locate the user to remove from the list.
2. Click the red X icon located in that same row.
3. Click Ok to remove the user's access. Click Cancel to return to the Users workspace.

HERE'S A TIP

Removing a user from the User List removes all access to the school's SWIS Suite account. If you simply need to remove the user's access to one of the school's applications, choose to edit the user information instead. Click the pencil icon in the user's row and change the access level for the application to No Access.

Managing SWIS Suite Contacts

PBISApps communicates with subscribers about their accounts and new features throughout the year. Current billing information is particularly important to ensure schools receive invoices in a timely way and payment is not delayed. As schools experience turnover or new people need to be identified as contacts, use SAMI to update the school's Contact Information.

To access the Contacts workspace:

1. Click the school name from the school list on the left side of the screen.
2. Click the Manage button to enable the primary workspace.
3. Click the Contacts tab to view a list of current

contacts associated with the school's SWIS Suite account.

Edit Administrator or Billing Contact Information

As in-school billing contacts or administrators change, use SAMI to keep the information current.

To select a new school contact, from the Contacts tab:

1. Locate the contact to change.
2. Click the Modify button.
3. Click the Staff List button.
4. Scroll through the list to locate the new staff member.
 - a. Click Add Staff if the person is not on the list.
 - b. Enter required information.
 - c. Click Submit
5. Click Select.
6. Enter the email address if it is missing.
7. Click Submit.

To edit an existing contact, from the Contacts tab:

1. Locate the contact to edit.
2. Click the Modify button.
3. Click the Staff List button.
4. Locate the current contact and click the pencil icon next to the name.
5. Update any of the information displayed.
6. Click Submit.
7. Click Select.
8. Click Submit.

Request to Change Billing Information

The organization listed as the Paying Institution is where invoices and communication about payment will be sent. The payer will either be the school itself or a third party. While facilitators cannot change this information directly in SAMI, they may make the request through the application. Allow two weeks for the requested change to take effect. From the Contacts tab:

1. Click the Request Change button next to the Paying Institution fields.
2. Edit any information on the Request New Paying Institution form.
3. Click Submit to send the request.

Request Facilitator Change

There are many reasons a facilitator no longer works with a school they used to facilitate. Whatever the reason, when a facilitator needs to transfer schools to another facilitator, from the Contacts tab:

1. Click the Request Change button next to the Assigned Facilitator fields.
2. Type the name of the new facilitator in the Name field. Note: A drop-down list appears as you type. Only certified facilitators appear in this list.
3. Click to select the new facilitator from the list.
4. Click Submit to send the request.

HERE'S A TIP

If you have more than five schools to transfer, making individual requests through SAMI is tedious. Instead, email our Customer Support team at PBISApps with a description of your request, a list of schools to transfer, and a reason why the change needs to happen.

If you need to take over as facilitator for any school and the current facilitator can't be reached, contact the schools you need to facilitate and ask them to make the request directly to Customer Support at PBISApps.

Managing Subscriptions

There are two places in SAMI to view the applications to which the school subscribes. The first is in the school list after clicking a school name. The second is in the Subscriptions tab in the primary SAMI Workspace. To access the Subscriptions tab:

1. Click the school name from the school list on the left side of the screen.
2. Click the Manage button to enable the primary workspace.
3. Click the Subscriptions tab to view the school's applications, whether they are active or cancelled, and the reason for cancellation.

Request Cancellation

If any school wants to cancel one, two, or all three of its SWIS Suite applications, facilitators can make that request on the school's behalf through SAMI. From the Subscriptions workspace:

1. Locate the application to cancel.
2. Click the Request Cancellation button.
3. Select a cancellation reason from the Reason for Cancellation drop-down list.
4. Provide additional details in the More Information field.
5. Click Submit to send the request.

Managing Facilitator Information

Any time a facilitator's information changes, it is important to make those updates in SAMI. PBISApps uses email, phone number, and mailing addresses for on-going communication. To update your information, click My Account at the upper right-hand corner of the screen. Use this space to update:

- | | |
|---------------------|-----------------|
| ▪ Organization | ▪ Email Address |
| ▪ PBISApps Password | ▪ Phone |
| ▪ Mailing Address | ▪ Fax |
| ▪ Username | ▪ Mobile |

Change Account Password

To change the password used to login to PBIS Applications:

1. Click My Account.
2. Click the Modify button next to the Change SAMI Password field.
3. Type a new password in the New Password field.
4. Re-type the new password in the Confirm Password.

5. Click Submit. Use the new password the next time logging into PBISApps.

Request Employer Change

If a job change results in a new employer, update the contact information through SAMI. To request this change:

1. Click My Account.
2. Click the Request Change button next to the Organization Affiliation field.
3. Enter the new information in the Request New Organization Affiliation form.
4. Click Submit to send the request.

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