



I-SWIS Student File Set-Up Checklist

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

Student Record (Person Management*)

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

First Name _____	Ethnicity _____	504 <input type="checkbox"/> Y <input type="checkbox"/> N
Last Name _____	Race(s) _____	IEP <input type="checkbox"/> Y <input type="checkbox"/> N
Gender <input type="checkbox"/> M <input type="checkbox"/> F <input type="checkbox"/> NB	English Learner <input type="checkbox"/> Y <input type="checkbox"/> N	Disability Category(ies): _____
District ID _____		

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

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

Student Case File Start Date: _____

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

Student Case File Starting Notes: _____

Add Team Members in I-SWIS Student File

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

Type	Full Name	Team Role*	Access**	Email Address
Staff		Coordinator***	Coordinator	

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

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

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

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

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

Type	File Name	Browse (Original File Location)
Assessment		
Plan		

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

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

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

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

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

Measure Worksheet

<p>Measure Type: <input checked="" type="checkbox"/> Fidelity <input type="checkbox"/> Outcome</p> <p>Measure Name: _____ <i>This is the label in data entry and at the top of reports to indicate what the measure will monitor</i></p> <p>Measure Description: _____</p> <p>Measure Start Date: _____ <i>The start date is usually the first date when supports were provided and/or when data were first collected</i></p>	<p>Measure Segments:</p> <ul style="list-style-type: none"> • _____ • _____ • _____ • _____ • _____ <p><i>*Segments are recommended but not required</i></p> <p>Data Collection Schedule(s)</p> <p>Schedule Start Date: _____</p> <p>Weekly (common): <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> R <input type="checkbox"/> F <input type="checkbox"/> S <input type="checkbox"/> weekdays</p> <p>Monthly (less common): <input type="checkbox"/> Day of the Month _____ <input type="checkbox"/> Week of the Month _____ Day: _____</p> <p>Measure Goal(s)</p> <p>Operator <i>Ordered based on common usage patterns</i></p> <p><input type="checkbox"/> Greater than or equal to (<i>most common</i>) <input type="checkbox"/> Less than or equal to (<i>common</i>) <input type="checkbox"/> Great than <input type="checkbox"/> Less than <input type="checkbox"/> Equal to (<i>uncommon</i>)</p> <p>Target: _____ <i>Target may be a number or percentage, depending on metric worksheet</i></p> <p>Goal Start Date: _____</p> <p>Goal End Date: _____ <i>*Goal end date not required</i></p>
<p>Metric Type: <input type="checkbox"/> Scale <input type="checkbox"/> Pct <input type="checkbox"/> Calc Pct <input type="checkbox"/> Rate <input type="checkbox"/> Pts/Ct/Dur <i>*Copy the corresponding metric worksheet into this box</i></p>	

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

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

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

Measure Worksheet

<p>Measure Type: <input type="checkbox"/> Fidelity <input checked="" type="checkbox"/> Outcome</p> <p>Measure Name: _____ <i>This is the label in data entry and at the top of reports to indicate what the measure will monitor</i></p> <p>Measure Description: _____</p> <p>Measure Start Date: _____ <i>The start date is usually the first date when supports were provided and/or when data were first collected</i></p> <hr/> <p>Metric Type: <input type="checkbox"/> Scale <input type="checkbox"/> Pct <input type="checkbox"/> Calc Pct <input type="checkbox"/> Rate <input type="checkbox"/> Pts/Ct/Dur <i>*Copy the corresponding metric worksheet into this box</i></p>	<p>Measure Segments:</p> <ul style="list-style-type: none"> • _____ • _____ • _____ • _____ • _____ <p>Data Collection Schedule(s) Schedule Start Date: _____</p> <p>Weekly (common): <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> R <input type="checkbox"/> F <input type="checkbox"/> S <input type="checkbox"/> weekdays</p> <p>Monthly (less common): <input type="checkbox"/> Day of the Month _____ <input type="checkbox"/> Week of the Month _____ Day: _____</p> <p>Measure Goal(s) Operator <i>Ordered based on common usage patterns</i> <input type="checkbox"/> Greater than or equal to (<i>most common</i>) <input type="checkbox"/> Less than or equal to (<i>common</i>) <input type="checkbox"/> Great than <input type="checkbox"/> Less than <input type="checkbox"/> Equal to (<i>uncommon</i>)</p> <p>Target: _____ <i>Target may be a number or percentage, depending on metric worksheet</i></p> <p>Goal Start Date: _____</p> <p>Goal End Date: _____ <i>*Goal end date not required</i></p>
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Add measure worksheets as needed (*one per page usually works best*)

Metric Worksheets **TEMPLATES** by Metric Type

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

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

Extra Measure Worksheets

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

Measure Worksheet **TEMPLATE**

<p>Measure Type: <input type="checkbox"/> Fidelity <input type="checkbox"/> Outcome</p> <p>Measure Name: _____ <i>This is the label in data entry and at the top of reports to indicate what the measure will monitor</i></p> <p>Measure Description: _____</p> <p>Measure Start Date: _____ <i>The start date is usually the first date when supports were provided and/or when data were first collected</i></p>	<p>Measure Segments:</p> <ul style="list-style-type: none"> • _____ • _____ • _____ • _____ • _____ <p>Data Collection Schedule(s) Schedule Start Date: _____</p>
<p>Metric Type: <input type="checkbox"/> Scale <input type="checkbox"/> Pct <input type="checkbox"/> Calc Pct <input type="checkbox"/> Rate <input type="checkbox"/> Pts/Ct/Dur <i>*Copy the corresponding metric worksheet into this box</i></p>	<p>Weekly (common): <input type="checkbox"/> S <input type="checkbox"/> M <input type="checkbox"/> T <input type="checkbox"/> W <input type="checkbox"/> R <input type="checkbox"/> F <input type="checkbox"/> S <input type="checkbox"/> weekdays</p> <p>Monthly (less common): <input type="checkbox"/> Day of the Month _____ <input type="checkbox"/> Week of the Month _____ Day: _____</p> <p>Measure Goal(s) Operator <i>Ordered based on common usage patterns</i> <input type="checkbox"/> Greater than or equal to (<i>most common</i>) <input type="checkbox"/> Less than or equal to (<i>common</i>) <input type="checkbox"/> Great than <input type="checkbox"/> Less than <input type="checkbox"/> Equal to (<i>uncommon</i>)</p> <p>Target: _____ <i>Target may be a number or percentage, depending on metric worksheet</i></p> <p>Goal Start Date: _____</p> <p>Goal End Date: _____ <i>*Goal end date not required</i></p>