



User's Manual

October 2020



How to Find Help

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

My I-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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Table of Contents

Overview	4
Who Should Use this Manual?	4
What is PBISApps?	4
What is the SWIS Suite?	4
What is I-SWIS?	5
About the QR Codes	5
Log In/Log Out	6
School Select Menu	7
Select School Menu Feature Overview	7
School Details Information Menu Feature Overview	7
Switch Schools	8
Quick Start	8
Create a New Student File	8
Add a New Team Member	8
Add a Measure	9
View Reports	10
I-SWIS Main	10
Open Student File	10
Create a New Student File	10
Update a Student File Status	11
Delete a Student File	12
Student File	12
Dashboard	13
Student File Summary	13
Assessments/BSP/Documents	14
View Documents	14
Add a Document	14
Edit a Document	15
Delete a Document	16
Available Document Templates	16
Measures	16
View Measures	17
Update a Measure Status	17
Add a New Measure	18
Edit a Measure	22
Delete a Measure	22
Team Members	23
View Team Members	23
Add a Team Member	24
Edit a Team Member Role or Access Level	24
Remove a Team Member	25
Send a Team Email	25
Assign a New Coordinator	25

Data Entry	26
Enter Measure Data	26
View Reports	27
School-Wide Reports	27
Student File Reports	29
Generate a Measure Report	30
Generate a Student Time Segment Report.	30
Generate a Student Single Time Segment Report	31
Tools – Account Settings	32
Account Profile	32
Applications - General.	32
Tools – School Settings	33
School Profile – Contact Information	33
Core Data – School Days	33
Core Data – School Enrollment.	34
Applications - General	35
Start Month	35
Use 504	35
Use Ethnicity.	36
Risk Ratio Comparison Group	36
Use English Learner	37
Use IEP	37
Use Additional Gender Options	37
Use Person Import	38
Require Staff and Require Student District IDs.	38
Other – Data Integrity Settings	38
Tools – Person Management	38
Add a New Record	40
Merge Duplicate Records	40
Revise a Record.	41
Delete a Record.	41
Update a Record Status	41
Update Multiple Records.	42
Tools – Data	42
Data Integrity	42
Person Import	43
Student Dashboard.	44
Tools - Support.	45
Tools - Invoice Details	45
View, Print, or Pay an Invoice	45

Appendix A - ISIS-SWIS Data	
Entry and Reporting Schedule	Inside Back Cover

Overview

Who Should Use this Manual?

The I-SWIS User's Manual is to provide I-SWIS users a quick reference and trouble-shooting guide. The manual is for use by I-SWIS facilitators and I-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 (SWIS, CICO-SWIS, I-SWIS, and SAMI) — is a reliable, confidential, web-based information system built to collect, summarize, and use student behavior data for decision making. Research demonstrates that educators can make more effective and efficient decisions when they have the right data in the right format at the right

HERE'S A TIP

Some aspects of I-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 PBISApps.



time. The SWIS Suite provides school/facility personnel with the information they need to be successful decision makers.

What is I-SWIS?

I-SWIS is a decision system within the SWIS Suite for students receiving more intensive supports for academic, social, or mental health services. Teams using I-SWIS have a place to:

1. Identify team members
2. Store formal assessments
3. Update individual support plans
4. Assess the effectiveness of the interventions

With I-SWIS individual student support teams are organized, informed, and able to make timely decisions to benefit each student.

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

About the QR Codes

The QR codes in this manual direct you to video tutorials or additional content as supplements to the written instructions. To use the QR codes you need a smart-phone or tablet with internet access and software that can read and interpret the codes.

There are many free QR code reader apps found in your device's app store - for example, the Apple App Store for iOS, Google Play for Android, or Windows Phone Store for Windows Phone. To download



An example of a QR code.

an app, search “QR code reader” in the app store on your device and download.

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



The login is located in the black bar at the top of the screen.

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

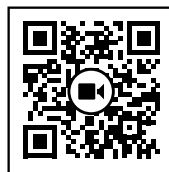
Once at PBIS Apps:

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 associated with the SWIS 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 SWIS Suite to access I-SWIS.

To log out of PBIS Apps and an I-SWIS account:

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



Scan for video tutorial
For instructions see page 5

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 school's account see a menu displaying each school's name. The School Select menu provides basic overview information without logging directly into the school's account.

Select School Menu Feature Overview

- **Search:** Type the name of a school on your list to jump directly to that account.
- **Favorites List Filter:** Click to display only schools marked as your favorites.
- **DataLink Schools List Filter:** Click to display only schools participating in DataLink to upload data.
- **Favorite:** Click the star to mark the school as a favorite.
- **Info:** Click to access additional information about the account.
- **Login:** Click to login to the school's account.

School Details Information Menu Feature Overview

- **School Information:** See which applications the school accesses, the school's grade range, and a full list of users along with their last login dates and times.
- **School Contact Information:** View the schools 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 school uses the SWIS Person Import feature.
- **DataLink Information:** This section provides information about whether the school uploads data using DataLink and what the latest upload file contained.

Switch Schools

Users with access to more than one school can switch schools without logging out of SWIS. *Note: Users with access to a single school'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 school from the drop-down menu.
4. Click OK.

Quick Start

Create a New Student File

1. In I-SWIS Main, click New.
2. Choose the student's name from the drop-down list.
3. Select the date the student's plan started, or the first date data was/will be collected.
4. (Optional) Enter any notes about the student file for historical purposes.
5. Click Save.

HERE'S A TIP

If the student to add is new to the school, click the Not In List icon and follow the steps for adding a student on page 40 in this manual.

Add a New Team Member

From the Student File Dashboard,

1. Click Team Members.

2. Click the Add icon.
3. Select the correct Person Type from the drop-down menu.
4. Select the team member by name from the drop-down list.
5. Type the team member's role on the team in the Team Member Role field. *Note: The Team Member Role is specific to the relationship or support tasks related to the identified student. This is not necessarily the person's position title.*
6. From the Access Level drop-down menu, select the access the team member will have to the student's file.
7. Click Save to save the new team member. Click Save & New to save the team member and enter another.
 - a. If assigning the team member access, enter a temporary password for the team member's login information in the Temp Password field.
 - b. Re-enter the temporary password in the Confirm Temp Password field.
 - c. Click Save.

Add a Measure

From the Student Dashboard:

1. Click Measures.
2. Click Add.
3. Select a type from the Measure Type drop-down menu.
4. Type a name for the measure.
5. Type a start date or select the start date using the calendar icon.
6. Select a Metric Type from the drop-down menu.
7. Click Add in Data Collection Schedule and select a weekly or monthly schedule for data collection.
8. Click OK to save the schedule.
9. Click Add in Goals and enter the set goal for the measure.

HERE'S A TIP

For more information about metric types and optional time segments, see page 20.

10. Click Ok to save the goal.
11. Click Save to save the measure. Click Save & New to save the measure and add another.

View Reports

To access the School-Wide Report:

1. Click I-SWIS Main.
2. Click School-Wide Reports.
3. (Optional) Click Refresh Report at any time to update with new data entered.

I-SWIS Main

The main page of I-SWIS contains a list of student files available in I-SWIS. By default, the student file list includes both active and inactive student files. This list can be modified based on search/filter criteria and information about the status of the student's record. User access to student information will vary.

Clicking once on a name from the Student Files list displays summary and history information for the selected record.

Open Student File

To open a student file in I-SWIS:

1. Click I-SWIS Main.
2. Locate the student file to open from the list.
3. Double-click the student's name.

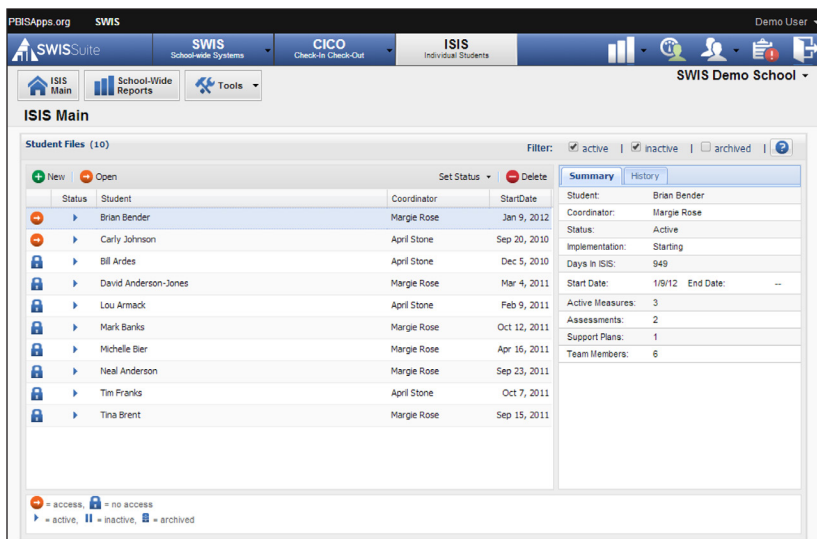
HERE'S A TIP

If a padlock icon is displayed to the left of the student name, the file is one you cannot access. Contact your I-SWIS coordinator for additional access.

Create a New Student File

From I-SWIS Main:

1. Click New.



The ISIS Main Dashboard

2. Choose the student's name from the drop-down list.
3. Select the date the student's plan started, or the first date data was/will be collected.
4. (Optional) Enter any notes about the student file for historical purposes.
5. Click Save.

Note: New student files default to an implementation status of Starting. Modify the student's implementation status as needed.

Update a Student File Status

From I-SWIS Main:

1. Right-click the student name from the list of enrolled students.
2. Click Set Status.
3. Choose the appropriate status from the drop-down menu.
 - a. **Active:** The student is currently enrolled in the school and data may be entered for the student at any time.
 - b. **Inactive:** The student is no longer enrolled in the school, but may possibly return (e.g., transfer students).

- c. **Archived:** The student is no longer enrolled in the school and is unlikely to return (e.g., graduated students).

HERE'S A TIP

Students in I-SWIS may fall in one of five implementation status categories. As the status changes, be sure to reflect the change within the student's file in I-SWIS.

1. **Starting:** The student's support plan is in early stages
2. **Progressing:** The student's support plan is in place and student is making progress
3. **Not Progressing:** The student's support plan is in place but student is not making progress
4. **Needs Revision:** The student's support plan needs to be revised
5. **Discontinued:** The student's support plan has been discontinued

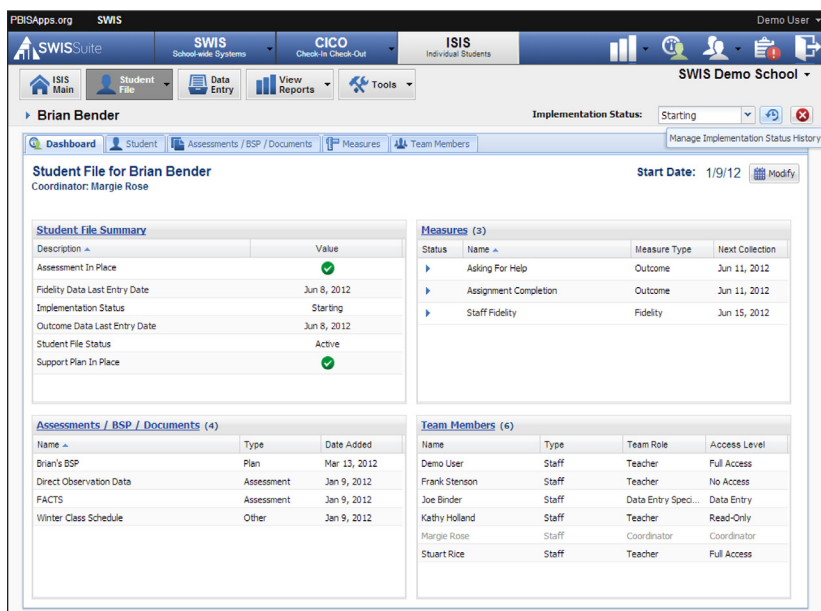
Delete a Student File

From I-SWIS Main:

1. Click to select the student's name.
2. Click Delete.
3. Click Delete to confirm. Click Cancel to return to I-SWIS Main.
4. If data exist in the student file, click Yes, Delete the Data to confirm the deletion. Click Cancel to return to I-SWIS Main.
5. Enter a deletion date and optionally notes related to the deletion. Click Cancel to return to I-SWIS Main.
6. Click Yes, Delete the Student File to confirm the deletion. Click Cancel to return to I-SWIS Main.

Student File

I-SWIS Coordinators create and manage student files, but may assign specific tasks and access to others on the team.



The Student File Dashboard.

Dashboard

To access the Student File Dashboard, double-click a name listed in I-SWIS Main.

The Dashboard contains a snapshot of the student file organized around four areas

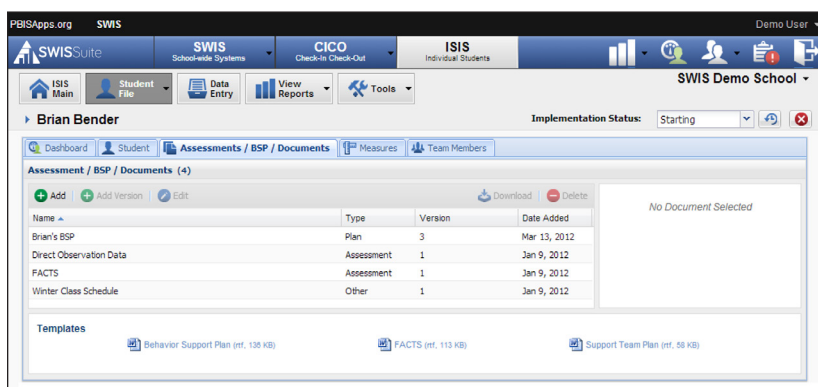
- Summary
- Measures
- Documents
- Team Members
- The student's name and coordinator name are displayed in the upper left-hand corner of the dashboard. The student file start-date and the ability to modify it is in the upper right-hand corner of the dashboard.

Student File Summary

The Student File Summary is located on the Student File Dashboard and provides information related to the most recent data entry date, implementation status, and documentation available for review.

Assessments/BSP/Documents

Coordinators and full-access users can upload and store documents related to each student file in I-SWIS. Each document can be downloaded for reference as teams make decisions about the student's support plan.



The Student File > Assessment/BSP/Documents tab.

View Documents

A full list of student file documents is visible from the Student File Dashboard. Here, each document is listed by name, type of document, and the date the document was added.

To view additional information about any document, from the Student File Dashboard, click Assessments/BSP/Documents.

Here, documents are listed by name, type, version number, and date added. The list can be sorted by clicking on any column header.

Add a Document

From the Student File Dashboard:

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

HERE'S A TIP

When naming a document, it should be clear enough to easily identify the document, but generic if you plan to upload additional versions later.

3. Type a title for the document in the Title field.
4. Click on Browse button next to the File field to locate the electronic file to be uploaded.
5. Select the type of file you are adding from the Type drop-down menu.
6. Click Save.

Add a New Document Version

As modifications occur to any document, a new version of the document can be uploaded into I-SWIS. Uploading a new version maintains the document's history.

From the Student
File Dashboard:

1. Click Assessments/BSP/Documents.
2. Click to select a file.
3. Click Add Version.
4. Click the Browse button next to the File field to locate the electronic file to be uploaded.
5. Click Save. The new version appears at the top of the version list on the right side of the Document list.

HERE'S A TIP

Document management procedures should be determined before uploading files into I-SWIS. It is recommended to save master copies on a single team member's computer, shared drive, or other secure location. Identify a single person to make edits or updates to master files and to upload files into I-SWIS.

Edit a Document

As modifications occur to any document, edit the master copy and upload it to replace the current file. The title and the document type can also be edited.

From the Student File Dashboard:

1. Click Assessments/BSP/Documents.
2. Click to select the file to be updated.

3. Click Edit.
4. Modify the Title, File, or Document Type as needed.
5. Click Save.

Delete a Document

From the Student File Dashboard:

1. Click Assessments/BSP/Documents.
2. Click to select the file to be removed.
3. Click Delete.
4. Click Delete to confirm the deletion. Click Cancel to return to the document list.

Available Document Templates

Three templates for common document types are available at the bottom of the Assessment/BSP/Document tab.

- Behavior Support Plan
- Support Team Plan
- FACTS

Click any template to download a copy. Schools/facilities need not use the templates provided within I-SWIS if local alternatives are available.

Measures

Measures within I-SWIS are set up to monitor the fidelity of implementation and student progress as identified within a student's support plan. Measures establish the data entry screen and data entry schedule.

There are two types of measures to select from when establishing measures for each student file:

1. **Fidelity:** Fidelity measures monitor the level at which staff implement the student support plan. Each student file requires collecting at least one fidelity measure.

2. **Outcome:** Outcome measures monitor the impact of the support plan on the student's academic or social behavior. Each student file requires at least one outcome measure.

View Measures

The Student File Dashboard displays all measures associated with the student plan. For more information on each measure, click Measures from the Student File Dashboard.

SWIS Suite interface showing the Measures tab for student Brian Bender. The interface includes a top navigation bar with tabs for Main, Student File, Data Entry, View Reports, and Tools. The Student File tab is active, and the Measures sub-tab is selected. The Measures table lists three measures: Asking For Help, Assignment Completion, and Staff Fidelity, each with columns for Status, Name, Measure Type, Metric Type, Start Date, End Date, and Next Collection. Filter buttons for active, inactive, and archived measures are visible.

Status	Name	Measure Type	Metric Type	Start Date	End Date	Next Collection
▶	Asking For Help	Outcome	Points / Count / Duration	May 7, 2012		Jun 11, 2012
▶	Assignment Completion	Outcome	Calculated Percent	Apr 30, 2012		Jun 11, 2012
▶	Staff Fidelity	Fidelity	Scale	Apr 30, 2012		Jun 15, 2012

The Student File > Measures tab.

The Measure tab displays both active and inactive student measures. Filter the list to include active, inactive and/or archived measures by selecting or unselecting the filter from the Measures tab. Sort the list by clicking on any column header.

Update a Measure Status

As the student's plan changes, updates to individual measures will need to be updated. There are three statuses available for each measure associated with a student file:

- **Active:** Data are currently collected.
- **Inactive:** Data are not collected at this time.
- **Archived:** The measure has been discontinued.

To update a measure's status, from the Student Dashboard:

1. Click Measures.

2. Right-click the measure to be updated.
3. Choose Set Status.
4. Select the correct status.
5. If inactive or archived: Type the measure's end date or select one from the calendar icon.
6. Click Ok to update the status. Click Cancel to return to the Measures tab.

Add a New Measure

From the Student Dashboard:

1. Click Measures.
2. Click Add.
3. Select a type from the Measure Type drop-down menu.
4. Type a name for the measure.
5. Type a start date or select the start date using the calendar icon.
6. Select a Metric Type from the drop-down menu.
7. Click Add in Data Collection Schedule and select a weekly or monthly schedule for data collection.
8. Click OK to save the schedule.
9. Click Add in Goals and enter the set goal for the measure.
10. Click Ok to save the goal.
11. Click Save to save the measure or click Save & New to save the measure and add another.

HERE'S A TIP

Once data have been saved to an I-SWIS measure, the Metric Type cannot be modified. It is important to carefully review measures shortly after set-up to ensure the measures fit data entry, reporting, and decision-making needs

Basic Information

- **Measure Name:** A short, descriptive title of what you want to measure (e.g., Rate of Disrespect).
- **Description:** A description detailing what you want to know, how you will measure it, and how often.
- **Start Date:** The earliest date for data collection to begin.

HERE'S A TIP

The Data Collection Schedule start date as well as the Goals start date default to the measure's Start Date. The measure's Start Date cannot pre-date the Student File Start Date.

Metric Type

The Metric Type identifies how data will be collected and summarized. Below is a list of how data will be entered given the metric type chosen.

- **Percent:** Enter percent values between 0-100%.

- **Calculated Percent:** Enter # of attempts / # of possible attempts. I-SWIS calculates the percent.

- **Point/Count/Duration:** Enter # of points, count of something, or duration of event for each time segment.

HERE'S A TIP

The Student File Set-Up Checklist contains a metric set-up worksheet for how to use each metric type. Explore the I-SWIS Demo account and practice in your I-SWIS facilitator's account for examples within the application.



- **Scale:** Enter a number based on the established scale.
- **Rate:** Enter the number of times the behavior is observed per length of time.

Metric Type Examples

Metric Type	Example A	Example B
Percent	What percentage of math problems did Matt complete each day?	What percentage of the class period did Jason complete without a disruptive outburst?
Calculated Percent	How many times did Emily use her “ask the teacher a question” skill out of four opportunities?	Out of five possible, how many periods did Lizbet arrive on time?
Point/ Count/ Duration	Ben will earn two points each time he shares with a peer. Record the number of points earned per day.	Record the number of minutes it takes Emile from ending lunch to initiating instruction.
Scale	Enter the extent to which we believe we have implemented Megan’s plan with fidelity on a scale from 1 = low, to 5 = high	Measure Jace’s temperament on a scale from 1 = disturbed, 2 = mild agitation, 3 = calm, 4 = engaged, and 5 = happy
Rate	Record the median number of words read correctly per min during literacy progress monitoring.	Record the number of Emmitt’s social initiations per number of minutes at recess.

Time Segments (optional)

Adding time segments allows the option for collecting data across multiple periods. This is an optional component for adding measures.

To use time segments for a measure, check the Use Time Segments

box in the Time Segments section of the Add Measure workspace. Uncheck the box to opt out of time segments for the measure.

Data Collection Schedules

The Data Collection Schedule establishes when the data are to be entered in I-SWIS. A Student File should contain one or more Data Collection Schedules. Teams may opt to collect data using an ad hoc schedule as needed.

- **Ad Hoc:** Allows data entry as needed in addition to any established data collection schedule.
- **Start Date:** The earliest date for data collection to begin.
- **End Date (optional):** The last date for data collection using this schedule.
- **Weekly:** Data collection occurs on a weekly schedule. Check the boxes next to the appropriate weekdays or utilize the quick selections: weekdays, all, none.
- **Monthly:** Data collection occurs on a monthly schedule based on a day or week of the month.

Goals

Measure goals entered in I-SWIS are based on criteria identified within the student's plan, benchmarks, and/or team agreements. I-SWIS allows one goal at a time per measure.

- **Operator:** The comparative indicator of performance (e.g., greater than >, less than or equal to ≤).
- **Target:** Numerical criteria of performance.
- **Start Date:** The earliest date the goal was implemented or monitored.
- **End Date:** The last date the goal was implemented or monitored.

HERE'S A TIP

To track a student's goal history, use the start and end dates as the goal changes. Using start and end dates, the goal line stair-steps to show how the goal shifted across time.

- **Notes:** Additional information about this goal.

Edit a Measure

From the Student Dashboard:

1. Click Measures.
2. Double-click the measure to edit.
3. Edit the following information as needed:
 - a. Basic Information
 - b. Metric (if no data have been entered and saved)
 - c. Time Segments
 - d. Data Collection
 - e. Goals
4. Click Save to save the changes. Click Cancel to return to the Measures tab.

HERE'S A TIP

Editing some information will not have an impact on previously entered data.

Time Segments: Editing the Time Segments of a Measure does not change previously saved data. Previous data will use the old time segments. Future data will be entered using the new Time Segments.

Data Collection Schedule: Editing the Data Collection Schedule(s) does not change previously entered data. To maintain a history of Data Collection Schedules, enter an End Date into the old schedule, and then add a new schedule to start on the appropriate date.

Delete a Measure

Measures should be deleted only if the measure was set up incorrectly, and/or if the team has determined that this measure was not

appropriate and should not be included in the student's case history.

1. In the Measures tab, click to select the measure to be removed.
2. Click Delete.
3. Click Yes, Delete the Data to confirm the deletion. Click Cancel to return to the Measures tab.

Team Members

For each student file, coordinators organize team members, assign team member access, and communicate with team members by email.

The screenshot shows the SWIS Demo School interface. The top navigation bar includes tabs for SWIS, CICO, and ISIS. The main content area is titled 'Brian Bender' and shows the 'Team Members' tab. A table lists team members with columns for Name, Team Role, Access Level, Email, and Type. The table includes entries for Demo User, Frank Stenson, Joe Binder, Kathy Holland, Margie Rose, and Stuart Rice.

Name	Team Role	Access Level	Email	Type
Demo User	Teacher	Full Access	ebc.coordinator@demo.edu	Staff
Frank Stenson	Teacher	No Access	Frank.Stenson@demo.edu	Staff
Joe Binder	Data Entry Specialist	Data Entry	jbinder@demo.edu	Staff
Kathy Holland	Teacher	Read-Only	Kathy.Holland@demo.edu	Staff
Margie Rose	Coordinator	Coordinator	mrose@demo.edu	Staff
Stuart Rice	Teacher	Full Access	Stuart.Rice@demo.edu	Staff

The Student File > Team Members tab.

HERE'S A TIP

While all student team members should be listed for each file, not all team members will have the same access to student file information. Team members may have full access, data entry access, read-only access, or no access to individual student files.

View Team Members

A full list of team members is visible from the Student File Dashboard. This view lists each team member by name along with type, team role, and access level displayed.

To view additional information about Team Members, from the Student File Dashboard, click Team Members.

This view lists team members

by name along with team role, access level, email address, and type. Sort the list by clicking any column header.

Add a Team Member

From the Student File Dashboard:

1. Click Team Members.
2. Click the Add icon.
3. Select the correct Person Type from the drop-down menu.
4. Select the team member by name from the drop-down list.

5. Type the team member's role on the team in the Team Member Role field.

Note: The Team Member Role is specific to the relationship or support tasks related to the identified student. This is not necessarily the person's position title.

6. From the Access Level drop-down menu, select the access the team member will have to the student's file.
7. Click Save to save the new team member. Click Save & New to save the team member and enter another.
 - a. If assigning the team member access, enter a temporary password for the team member's login information in the Temp Password field.
 - b. Re-enter the temporary password in the Confirm Temp Password field.
 - c. Click Ok.

HERE'S A TIP

Access should be assigned to team members with specific tasks related to entering data, generating reports, and/or assisting the coordinator in Student File management. In general, non-staff team members should be given "No Access" to ISIS-SWIS.

Edit a Team Member Role or Access Level

As team member information changes, updates can be made directly within I-SWIS. From the Student File Dashboard:

1. Click Team Members.

2. Double-click the name of the team member to edit.
3. Modify the team member's role or access level.
4. Click Save.

Remove a Team Member

From the Student File Dashboard:

1. Click Team Members.
2. Click to select the team member to remove.
3. Click Remove.
4. Click Remove to confirm the removal. Click Cancel to return to the Team Member tab.

HERE'S A TIP

Use Person Management to edit a team member's name, type, or email address. See page 41 for more information.

Note: Removing a team member in I-SWIS removes the team member from, and his/her access to, the student file. The team member's name remains on the related student/staff/non-staff roster. All data associated with the team member remains in the application.

Send a Team Email

From the Student File Dashboard:

1. Click Team Members.
2. Click Email Team to open an email to all team members in your default email program.
3. Click any team member's individual email address to open an email to that team member using your default email program.

Assign a New Coordinator

I-SWIS coordinators may transfer management responsibilities for one or more student files to another I-SWIS coordinator either temporarily or permanently. Each student file must be assigned to a coordinator. Only transfer Student Files with the new coordinator's permission.

From the Student File Dashboard:

1. Click Team Members.
2. Click Assign Coordinator.
3. Select a coordinator from the list of identified coordinators.
4. Click Assign.

Note: I-SWIS facilitators setup coordinators. After clicking Assign Coordinator, if a message appears stating there are no active coordinators, contact your facilitator and ask to have the new coordinator entered.

Data Entry

Data Entry is based on the measures set up for the individual student file. Please use the Data Entry Workspace screenshot to identify the location of each corresponding step in the I-SWIS Data Entry workspace.

Enter Measure Data

From I-SWIS Main

1. Double-click the student's name from the Student File list (not shown in screenshot).
2. From the Student Dashboard, click on Data Entry.
3. Use the **Calendar** to select the appropriate data entry date as needed. (Today is selected by default.)
4. Set the **student's status for the day** using the Student Status drop-down menu. (Present is selected by default.)
5. Set the **student's status for the measure** using the Student Status drop-down within the appropriate measure. (Present is selected by default.)
6. Enter **scheduled measure data** as indicated in I-SWIS.
7. Optional data to enter:
 - a. **Ad hoc data:** Click on the Ad hoc button to the right of the measure name.

- b. **Notes by day:** Click the Notes icon next to the day's Student Status drop-down menu.
 - c. **Notes by measure:** Click the Notes icon to the right of the measure's Student Status drop-down menu.
 - d. **Support Plan Change:** Type the change in the Support Plan Change field.
8. Click Save.

The Data Entry Workspace. Numbers included correspond to the steps outlined in Enter Measure Data.

View Reports

Data collected in I-SWIS are available for review within the Reports section. Tailor reports for efficient, effective decision making.

School-Wide Reports

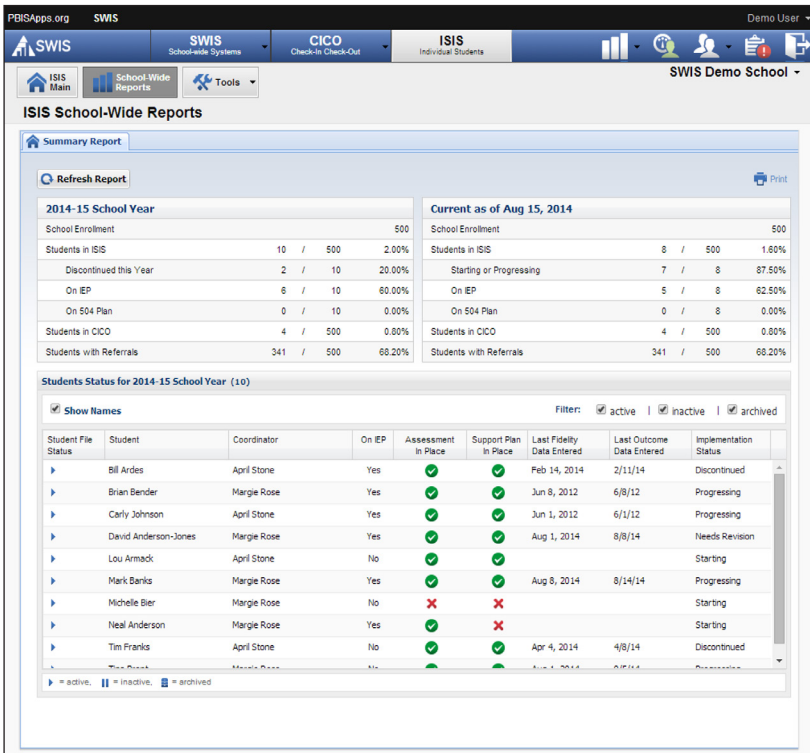
The School-Wide Report is available from I-SWIS Main. The report displays information about the overall implementation of Tier III supports monitored across the SWIS Suite. User access to the School-Wide Report will vary.

The School-Wide Report has three sections:

- **School Year:** This section contains a summary of student data collected across the SWIS Suite for the current school year.
- **Current:** This section contains a current snapshot of today's student data.
- **Student Status:** This section lists the students who have I-SWIS files within the current school year. The list can be filtered by the file status (active, inactive, archived). The list can be sorted by clicking any of the column headers.

To access the School-Wide Report:

1. Click I-SWIS Main.
2. Click School-Wide Reports.
3. (Optional) Click Refresh Report at any time to update with new data entered.



2014-15 School Year

School Enrollment	500
Students in ISIS	10 / 500 2.00%
Discontinued this Year	2 / 10 20.00%
On EP	6 / 10 60.00%
On 504 Plan	0 / 10 0.00%
Students in CICO	4 / 500 0.80%
Students with Referrals	341 / 500 68.20%

Current as of Aug 15, 2014

School Enrollment	500
Students in ISIS	8 / 500 1.60%
Starting or Progressing	7 / 8 87.50%
On EP	5 / 8 62.50%
On 504 Plan	0 / 8 0.00%
Students in CICO	4 / 500 0.80%
Students with Referrals	341 / 500 68.20%

Students Status for 2014-15 School Year (10)

Filter: ☒ active | ☐ inactive | ☐ archived

Student File Status	Student	Coordinator	On EP	Assessment in Place	Support Plan in Place	Last Fidelity Data Entered	Last Outcome Data Entered	Implementation Status
▶	Bill Ardes	April Stone	Yes	✓	✓	Feb 14, 2014	2/11/14	Discontinued
▶	Brian Bender	Margie Rose	Yes	✓	✓	Jun 8, 2012	6/8/12	Progressing
▶	Carly Johnson	April Stone	Yes	✓	✓	Jun 1, 2012	6/1/12	Progressing
▶	David Anderson-Jones	Margie Rose	Yes	✓	✓	Aug 1, 2014	8/8/14	Needs Revision
▶	Lou Armack	April Stone	No	✓	✓			Starting
▶	Mark Banks	Margie Rose	Yes	✓	✓	Aug 8, 2014	8/14/14	Progressing
▶	Michelle Bier	Margie Rose	No	✗	✗			Starting
▶	Neal Anderson	Margie Rose	Yes	✓	✗			Starting
▶	Tim Franks	April Stone	No	✓	✓	Apr 4, 2014	4/8/14	Discontinued
▶	Tracy Book	April Stone	No	✓	✓	Aug 1, 2014	8/1/14	Progressing

▶ = active | ■ = inactive | ■ = archived

Example of the School-Wide Report.

Student File Reports

Three types of reports are available within each student file depending on the measure types used.

- **Measure:** Report information about a student's fidelity and outcome measures per day. The options to report two measures together and display SWIS referral data are available.
- **Time Segments:** For measures set up with time segments, report the average or total score entered across segments.
- **Single Time Segment:** For measures set up with time segments, report all data entered for a specific segment.

Note: If Time Segments are not used within a student's plan, Time Segment and Single Time Segment reports cannot be generated.



Example of the Measure Report

Generate a Measure Report

From I-SWIS Main:

1. Double-click a student name from the Student File list.
2. Click on View Reports.
3. Click Measure.
4. In the Options panel on the left, identify the following:
 - a. **Start:** Earliest date from which the report displays data.
 - b. **End:** Latest date from which the report displays data.
 - c. **Primary Measure:** The measure to be reported.
 - d. **Comparative Measure:** Additional data to be reported for comparison.
 - e. **Additional information:** Check any of the boxes to display/not display any of the following information on the report
 - Student Name
 - Support Plan Changes
 - Goal Lines
 - Notes
5. Click Generate.

HERE'S A TIP

It is recommended to review fidelity measure data as a comparison with outcome measure data to identify any correlation between the two.

Generate a Student Time Segment Report

From I-SWIS Main:

1. Double-click a student name from the Student File list.
2. Click View Reports.
3. Click Time Segment.
4. In the Options panel on the left, identify the following:
 - a. **Start:** Earliest date from which the report displays data.
 - b. **End:** Latest date from which the report displays data.

- c. **Primary Measure:** The measure to be reported.
- d. **Show Student Name:** Check the Student Name box to include the student name on the report. Uncheck it to hide the information.
- e. **Include “No School” in Max Scheduled Days:** Check the Include No School days box to include all days entered as No School in the count of days with possible points. Uncheck the box to exclude No School days from the count.

5. Click Generate.

Generate a Student Single Time Segment Report

From I-SWIS Main:

1. Double-click a student name from the Student File list.
2. Click View Reports.
3. Click Single Time Segment.
4. In the Options panel on the left, identify the following:
 - a. **Start:** Earliest date from which the report displays data.
 - b. **End:** Latest date from which the report displays data.
 - c. **Primary Measure:** The measure data to be reported.
 - d. **Time Segment:** The specific time segment to be reported.
 - e. **Comparative Measure:** Additional data to be reported for comparison. *Note: Comparative data are not specific to the time segment selected in the Primary Measure.*
 - f. **Additional information:** Check any of the boxes to display/not display any of the following information on the report:

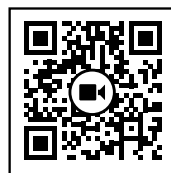
▪ Student Name	▪ Support Plan Changes
▪ Goal Lines	▪ Notes
5. Click Generate.

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 I-SWIS, allowing each user to customize I-SWIS for individual usage.

To access Account Settings:

1. Click Tools.
2. Click Account Settings.



*Scan for video tutorial
For instructions see page 5*

Within the Account Settings menu, schools/facilities 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.

1. To modify Account Profile Settings, in Account Settings:
2. Click on Profile under Account Profile.
3. Click the name of the section to edit.
4. Type the new information to modify Account Profile information.
5. Enter your current password for changes to take effect.
6. Click Save.

Applications - General

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

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

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.

Tools – School Settings

To access School Settings:

1. From I-SWIS Main, click Tools.
2. Click School Settings.

HERE'S A TIP

School Settings are set for the entire school and will be the same for all users.

Within the School Settings menu, schools/facilities can view and modify information related to:

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

The School Profile includes all physical and contact information for the school/facility. Any of the information provided in this section can be updated with the exception of the District Name:

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

School Profile – Contact Information

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

- Admin Contact
- Billing 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 schools days for each calendar month (Early release days count as one full day).
4. Click Save.

Core Data – School Enrollment

To enter or modify School Enrollment, in School Settings:

1. Click on School Enrollment.
2. Click on the correct school year to expand the menu.
3. Enter the total enrollment.
4. **If the school/facility collects additional student demographic data (Race/Ethnicity, Gender, IEP, and/or English Learner information):** Enter the number of students within each subgroup. Total enrollment calculates automatically based on the subgroup enrollments entered.
5. Click Save.

HERE'S A TIP

Enrollment data should be entered at the same time as the annual census count (typically by October 1st). Enrollment totals only change during a school year if a large (10-20%) change in enrollment occurs mid-year.

Note: In order to generate the School-Wide Reports, I-SWIS requires details about School Enrollment.

Applications - General

To enter or modify General Settings, in School Settings:

1. Click General.
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.

School Enrollment	
2020-21	
Total School Enrollment	504
Race / Ethnicity	
Hispanic/Latinx	100
American Indian/Alaska Native	6
Asian	7
Black/African American	65
Native Hawaiian/Other Pacific Islander	4
White	300
Unknown	0
Not Listed	0
Multiracial	22
Total Race / Ethnicity Enrollment	504

The School Settings > Core Data > School Enrollment settings.

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

Schools/Facilities may opt to collect data about individual students' 504 status.

To disable this feature:

1. Select No from the drop-down menu.
2. Click Save

HERE'S A TIP

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

- Individual students must report both their ethnicity as well as race.
- Students may identify more than one race.
- Multi-Racial is listed only as a category for aggregate reporting purposes.

Use Ethnicity

Default: Enabled

When Use Ethnicity is enabled, the 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 student ethnicity and race information, please refer to the Person Management section on page 38.

Risk Ratio Comparison Group

Default: All Other Groups

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

Note: Schools select a comparison group for student groups with more than 2 subgroups identified. This setting is available in the Use Race/Ethnicity and Use Additional Gender Options settings.

Use English Learner

Default: Disabled

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

1. Select Yes from the drop-down menu.
2. Click Save.

Use IEP

Default: Enabled

When enabled, users will identify each student's 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 student'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.

Use Person Import

Default: Disabled

When enabled, users have the ability to import student and staff lists directly into SWIS. To enable this setting:

1. Select Yes from the drop-down menu.
2. Click Save.

Require Staff and Require Student District IDs

Staff District ID Default: Enabled

Student District ID Default: Enabled

The SWIS Suite allows the school/facility to utilize district/internal identification numbers for staff in addition to the SWIS assigned ID number. If disabled, the staff and/or student SWIS ids are displayed on reports. To disable this feature:

1. Select No from the drop-down menu.
2. Click Save.

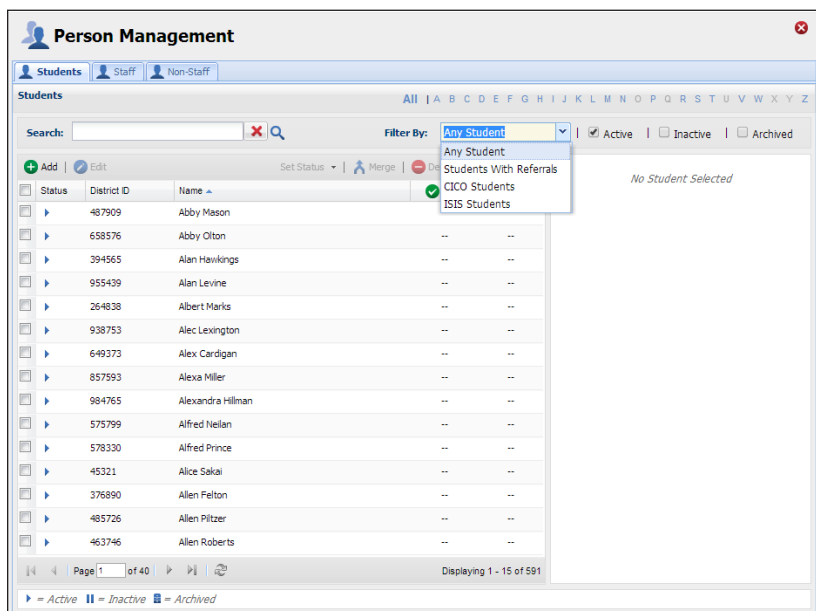
Other – Data Integrity Settings

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 set 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 before which specific record types will be ignored.
4. Click Save.

Tools – Person Management

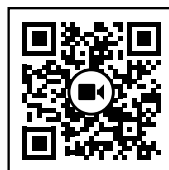
Person Management allows schools/facilities to organize students, staff, and non-staff records associated with SWIS Suite data.



The Person Management workspace.

To access Person Management:

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



*Scan for video tutorial
For instructions see page 5*

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. The filters Active, Inactive, and Archived can be checked and unchecked 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: Students, Staff, Non-Staff.
3. Click Add.
4. Enter all required information about the person.
5. Click Save to save or click OK and New to save and open a new form to continue adding new person records.

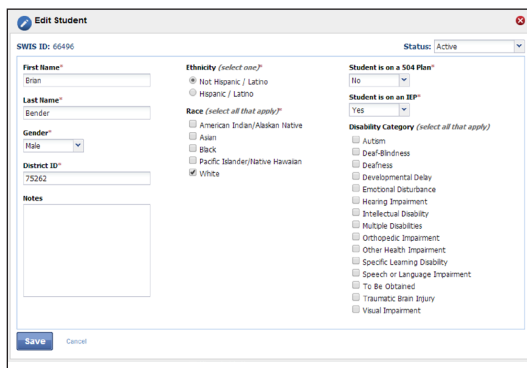
HERE'S A TIP

For students on an IEP, a disability category must be selected. "To Be Obtained" should only be selected when a record urgently needs to be recorded but the disability category is not available. It is critical to update this information to keep records current for reporting and decision making.

Merge Duplicate Records

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

1. Check the Active, Inactive, and Archived filter boxes to display all person records associated with the 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 Student/Staff/Non-Staff to Delete field type the name of the person record to delete. All data from this record will be moved to the Student/Staff/Non-Staff record chosen to be retained.



The Edit Student workspace.

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.
4. Revise the necessary information.
5. Click Save.

Delete a Record

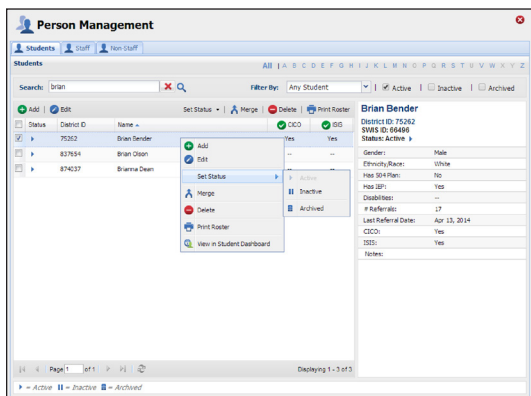
1. Type the name of the record to be deleted in the Search field.
2. Click the Search icon.
3. Click to select the record to delete.
4. Click the Delete button.
5. Click Delete to confirm. Click Cancel to return to the roster.

HERE'S A TIP

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

Update a Record Status

1. Check the Active, Inactive, and Archived filter boxes to display all persons associated with the 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:
 - **Active:** the person is currently associated with the school.
 - **Inactive:** the person is not currently associated with the school, but may return (e.g., transfer students).



The Person Management workspace with Set Status menu.

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.

- **Archived:** the person is not currently associated with the school and will not be returning (e.g., graduated students).
- Click OK.

Update Multiple Records

Multiple person records

Tools – Data

Data Integrity

To access the Data Integrity system:

1. From I-SWIS Main, click Tools.
2. Click Data Integrity.



Scan for video tutorial
For instructions see page 5

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 students **missing district ids**
- **Duplicate** staff, non-staff, or student records

- Staff, non-staff, or students with **duplicate district ids**
- **Duplicate referrals**
- Referrals **out of date range** (referrals before 1997 or with future dates)
- Referrals **out of time range** (based on the Time Range setting established in School Settings)
- Referrals with **Action Pending** marked as the Action Taken
- Referrals with a **major/minor behavior mismatch**
- **Missing or incomplete School Days data**
- **School Days data out of range** (months with more days than possible weekdays)
- **Missing/Incomplete School Enrollment data**
- **School Enrollment data out of range** (greater than 2500 students)
- Students with a **Disability Category marked as To be Obtained**
- Students on an IEP with **no Disability identified**
- **Inactive/Archived students enrolled in CICO-SWIS**
- **Inactive/Archived students in I-SWIS** with open student 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.

Person Import

Person Import allows any SWIS Suite school to import a list of students or staff from a Student Information System into the SWIS application.

Importing these records reduces the amount of time schools spend manually entering data already available in another system.

Schools' data must meet certain requirements to ensure a clean import of person records. These requirements ensure the import process is accurate without creating duplicate records.

All schools utilizing Person Import must have:



*Scan for video tutorial
For instructions see page 5*

- Student and staff district ids required in School Settings
- All active and inactive students and staff identified with a district id. (The process ignores archived students and staff.)
- All unique district ids. No two student records, no two staff records have the same district ids.

HERE'S A TIP

Visit the Data Integration section of PBISApps.org for more information on the pros and cons related to Person Import.

- The ability to generate an import file matching the required format.

Users with specific access to SWIS and/or CICO-SWIS can enable Person Import for the school. Users with access only I-SWIS cannot enable this feature, but some may have access to the Person Import Dashboard.

Student Dashboard

The Student Dashboard provides school/facility personnel with a comprehensive report for an individual student with data in SWIS, CICO-SWIS, and/or I-SWIS.

To access the Student Dashboard:

1. Click Tools, then click Student Dashboard.
2. Double-click the student record to select a student to view from the Select a Student list.
3. The Student Dashboard opens with data from the current school year.
4. Select another year from the drop-down menu located next to the student's name to display data from previous school years.



Scan for video tutorial
For instructions see page 5

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

Student Dashboard reports include:

- Summary
- Latest Referrals—the student's 10 most recent referrals.
- Referrals Per Year
- Suspension/Expulsion
- Referrals By Motivation
- Referrals By Time
- Referrals By Problem Behavior
- Referrals By Location
- Referrals By Day Of Week
- Average Referrals Per Day Per Month
- CICO-SWIS Individual Student Count (if your school uses CICO-SWIS and the student has data)

Tools - Support

As questions come up about how to use I-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 PBISApps Support 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 school'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 + x: 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.
 5. Click Pay Invoice and the application opens a new window to the online portal to pay your invoice with a credit card.

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

Tools – User Management

A list of people with access to a school'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 their:

- Username
- Access level to SWIS, CICO-SWIS 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 - I-SWIS Data Entry and Reporting Schedule

School: _____ Date: _____

Team: _____ Team Coordinator: _____

Data Entry

Student Name	Entry Staff	Measures	Schedule

Report Generated

Student Name	Entry Staff	Measures	Schedule

