Participant Name: ________________________________________

Session Date(s): ________________________________________

User Role: ______________________________________________

SWIS Facilitator(s): ______________________________________

Facilitator Contact Information: ____________________________
Swift at SWIS
Introduction to the School-Wide Information System
January 2018

Swift at SWIS Sections

A. Introduction to SWIS
B. Data-Based Decision Making
C. Roles & Access
D. Account Set Up (Tools)
E. Referral Data Entry & Review
F. Basic Reporting & Analysis
G. Drill Down Tool (Optional)

Role of the SWIS Facilitator

SWIS Facilitators have the privilege of supporting local schools as they implement & maintain SWIS

- Initial Installation
- User Training
- Team Coaching
- Technical Assistance
- Annual Readiness Checks
Section A

School-Wide Information System (SWIS)

Purpose and Objectives

- **Purpose:** To introduce SWIS as a decision system for social climate and discipline data along with the benefits, features, and impact on staff procedures
- **Learner Objectives:**
  1. Describe the purpose and benefits of SWIS to colleagues
  2. Identify basic features of SWIS
  3. Describe potential impact on staff procedures for responding to and documenting problem behavior incidents

What is SWIS?

The School-Wide Information System (SWIS) is a web-based decision system used to improve behavior support in schools and other educational facilities by providing school personnel and stakeholders with accurate, timely, and practical information for making decisions about school environments.
Why Is My School Adopting SWIS?

- To improve the quality of decisions about social climate and behavior
- To improve consistency in response to and documentation of problem behavior across staff, locations, time of day, and students
- Regularly monitor patterns of problem behavior across the school to identify contexts (e.g., locations, time of day) where systems can be improved to reduce problem behavior
- Consistently consider and report the WHY (perceived motivation) of the behavior
- Identify and reduce disproportionality in discipline across sub-groups represented in our school (e.g., racial, ethnic, disability, gender)

Research on Sustainability of SWPBIS

**What single factor is most related to high sustainability of SWPBIS?**

The frequency with which DATA are presented to all school staff


Why was SWIS developed?

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategy</th>
<th>Rationale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make schools more effective learning environments</td>
<td>Repeatedly giving people the right information (data) at the right time, in the right format is the single most effective way to improve decision making and achieve valued outcomes.</td>
<td>Why behavior? Student social behavior continues to be the most common reason why students are excluded from schools or instruction.</td>
</tr>
</tbody>
</table>
Collecting Referral Data in SWIS

Staff observe a problem incident.
Referral Form Completed
Paper or Electronic
Trained user reviews and enters or accepts.

Not a consequence... IT'S DATA!

Basic Features in SWIS

There is a public Demo site if anyone is interested in exploring SWIS features.

Instructions:
www.pbisapps.org >
click on App Demos >
click on SWIS, CICO-SWIS, and I-SWIS Demo.

Dashboard (Current Year Summary)

Summary of data for current school year:
▲ Referrals per day per month
▲ Referrals by Time
▲ Referrals by Location
▲ Referrals by Day of Week
▲ Referral by Problem Behavior
▲ Referrals by Grade
▲ Referrals by Student (screening)
Standardized Reporting Options

Core Reports
- Specific date ranges for meeting cycles
- Analyzed at least monthly

Additional Reports
- Specific reports for quarterly and/or annual reporting
- Ethnicity reports to monitor disproportionality

Sample Report: Referrals by Location

Staff will receive updates from behavior team that include a summary of SWIS data

Navigation Demonstration
- Dashboard
- Core Reports
- Additional Reports
- Data Integrity
- Add Referral
- Drill Down

Swift @ SWIS Activity Packet July 2021
Section B

SWIS &
Data-Based
Decision Making

Purpose and Objectives

Purpose: To describe basic principles of data-based decision making using SWIS data as an example

Learner Objectives:
1. Describe basic features of data-based decision models
2. Explain the value of data in identifying the context and function of a problem

Thoughts on Data-Based Decisions

As decision makers, we need a deliberate process to guide us through the examination and analysis of data. Without this, we may be apt to substitute strongly held opinions for the fact-based conclusions that would be derived from a review of the actual data.

**Desired Outcome:**
Enhanced social **competence** & academic **achievement** for all students.

How do we get to our desired outcome?

**Old Problem Solving Model**

- **Problem**
- **Solution**

**Data-Based Decision Making**

Decisions are more likely to be effective and efficient when they are based on...

The quality of data-based problem solving depends most on the first step to define the problem to be solved with:

- **Precision**
  (who, what, where, when, how often, why)
- **Clarity**
  (general agreement on priorities)
Why Use Data for Decision Making?

- Data help place the "problem" in the local context rather than on the students.
- Data help us ask the right questions...they do not provide the solutions.
- Use data to:
  - Identify problems
  - Refine problems and understand the context
  - Define the questions that lead to a solution

Current Reality & Gaps

a. What is our current reality overall?
b. What are the desired outcomes?
c. Where are the gaps
d. What is the highest priority?

Context First

What?  Where?  How often?
When?  Who?
The Last (and Hardest) Question

Perceived Motivation (Why?)

“What is perceived as maintaining the problem behavior?”

Perceived Motivation Falls Into These Two Categories:

<table>
<thead>
<tr>
<th>Obtain</th>
<th>Avoid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attention</td>
<td>Attention</td>
</tr>
<tr>
<td>(adults or peers)</td>
<td>(adults or peers)</td>
</tr>
<tr>
<td>Tangible</td>
<td>Tangible</td>
</tr>
<tr>
<td>(items, activities, sensory)</td>
<td>(items, activities, sensory)</td>
</tr>
</tbody>
</table>

Prioritizing Perceived Motivation

Without understanding the function (perceived motivation) of a problem, our “solutions” are equally likely to make a problem WORSE as they are to make it BETTER.
Precision Statement Example

There are more ODRs for aggression on the playground than last year. These are most likely to occur during first recess, with a large number of students, and the aggression is related to getting access to the new playground equipment.

- What? more ODRs for aggression
- Where? on the playground
- Who? a large number of students
- When? first recess
- Why? getting access to the new playground equipment

Types of Information (Data)

Fidelity Data
Did we implement the systems and strategies we agreed upon?

Outcome Data
Is the plan resulting in progress toward our goals?

Connecting Fidelity & Outcome Data

<table>
<thead>
<tr>
<th></th>
<th>Lucky</th>
<th>Sustaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outcome</td>
<td>Positive outcomes, low understanding of how they were achieved</td>
<td>Positive outcomes, high understanding of how they were achieved</td>
</tr>
<tr>
<td></td>
<td>Replication of success is unlikely</td>
<td>Replication of success likely</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Losing Ground</th>
<th>Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outcome</td>
<td>Undesired outcomes, low understanding of how they were achieved</td>
<td>Undesired outcomes, high understanding of how they were achieved</td>
</tr>
<tr>
<td></td>
<td>Replication of failure likely</td>
<td>Replication of mistakes unlikely</td>
</tr>
</tbody>
</table>
Multi-Tiered System of Supports (MTSS)

1. Universal—primary prevention provided to all students, effective for approximately 80%
2. Secondary—targeted, small group 15% of student population
3. Tertiary—intensive, individualized 5% of student population

All specialized interventions are more effective and more durable with universal, school-wide behavioral expectations as a foundation.

Continuous Quality Improvement

- Identify problems with precision
- Establish goal(s)
- Develop solution(s)
- Implement solution(s) with integrity and fidelity
- Monitor outcomes and compare to goal(s)
- Reassess and revise solution(s) as needed

Using Data for Decision Making

**Universal Screening Tool**
- 0-1 Office Discipline Referrals (ODRs)
- 2-5 ODRs
- 6+ ODRs

**Progress Monitoring Tool**
- Gather data to assess progress of intervention or on action plan

**Summative Evaluation**
- Summarize data across large date ranges (e.g., quarterly, annually) to monitor and prevent previous problem patterns
Screening: Referrals by Student Report

Hallway Referrals by Student ID
Sept. 3-Nov. 9

<table>
<thead>
<tr>
<th>Individual Issue</th>
<th>System Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fewer than students in the same context</td>
<td>10+ students in the same context</td>
</tr>
</tbody>
</table>

SWPBIS Basic Decision Guidelines

What are indicators that a student needs additional supports for externalizing social behavior?

- Tier I: 0-1 major ODR
- Tier II: 2-5 major ODRs
- Tier III: 6+ major ODRs

Is the problem a system-level or student-level issue (rule of 10)?

- System Issue: 10+ students within a similar context (e.g., location, time of day, grade) engaging in similar behaviors
- Individual/Small Group: Fewer than 10 students within similar context engaging in similar behaviors

When should schools start screening?

Cumulative Mean ODRs Per Month for Elementary Schools

- Differences become clear in October

McIntosh et al (2010)
The “October Catch” Possibilities

Hypothetical Cumulative Mean ODRs

<table>
<thead>
<tr>
<th>Hypothesized Impact of October Catch</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Impact (0-1)</td>
</tr>
<tr>
<td>Hypothesized 20% Decrease (2-5)</td>
</tr>
<tr>
<td>In a school of 500 students this could mean:</td>
</tr>
<tr>
<td>• 150 less referrals</td>
</tr>
<tr>
<td>• 25-75 hours staff time per school year!</td>
</tr>
</tbody>
</table>

Big Ideas

- Identify the **RIGHT** data, in the right format
- Identify the **RIGHT** people who:
  - Meet consistently (**RIGHT** time)
  - Start meetings with data
  - Strategically use data to develop solutions and action plans
  - Implement and monitor action plans (fidelity & outcomes)

Thoughts on Data-Based Decisions

Data-based decision making (DBDM) is the process of planning for student success (both academic and behavioral) through the use of ongoing progress monitoring and analysis of data.

- Douglas County School District (Colorado)
Activity B: Discussion

What are current goals for incorporating SWIS data into current decision-making routines?
Section B: SWIS & Data-Based Decision Making

Reflection on Data Integrity and Confidentiality

What are current goals for incorporating SWIS data into current decision-making routines?
Section C
SWIS Roles & Access

Purpose and Objectives

- **Purpose:** To describe the roles and responsibilities associated with maintaining the SWIS account
- **Learner Objectives:**
  1. Identify the roles and responsibilities of the SWIS Admin, Data Reviewer/Entry, and Data Analyst users
  2. Identify the 3-5 individuals in the school who will maintain the SWIS account and data
  3. Identify the role and responsibilities of adopting an electronic referral process and the Referral Entry Only access

SWIS Roles

- SWIS Admin
- SWIS Reviewer
- SWIS Data Entry
- SWIS Data Analyst
- SWIS IT Manager
- SWIS Referral Entry Only
**SWIS Admin Role**

**Role**
- Responsible for managing the SWIS account including School Settings & staff access to electronic referral entry, monitor Referrals by staff quarterly
- Building-level liaison regarding SWIS implementation and related procedures

**Access**
- Manage all SWIS Settings, identify SWIS reviewers, manage Referral Entry Only staff members, full access to all SWIS functionality (e.g., Data Entry, Person Management)
- Access to Referrals by Staff reports

Limited to one or two staff members

---

**SWIS Data Entry Role**

**Role**
- Review paper referrals for accuracy and completion, follow-up as needed, enter final referral data, maintain person records, enter school days & enrollment, and/or monitor data integrity. Guide decisions about staff training or coaching needed in referring problem behavior

**Access**
- Enter paper referral data, full access to Person Management, access to School Profile, School Days, and Enrollment settings, access to most SWIS reports (excluding Referrals by Staff)

Two or three staff members with scheduled time each day

---

**SWIS Data Reviewer**

**Role**
- Review electronic referrals for accuracy and completion, reassign referrals for follow-up edits, approve referrals. Guide decisions about staff training or coaching needed in referring problem behavior

**Access**
- Review, assign, or approve referrals submitted electronically
- Access to all data entry and data analyst functionality

Two or three staff members with scheduled time each day
SWIS Data Analyst

**Role**
Monitor data integrity and core reports at least monthly, monitor additional reports as appropriate, drill down into potential problem areas, provide student-level or customized reports on request, summarize and share data with decision-makers and teams.

**Access**
- Review, assign, or approve referrals submitted electronically
- Access to all data entry and data analyst functionality

Two or three staff members with scheduled time each day

SWIS Referral Entry Only (REO)

**Role**
Observe and respond to student problem behavior according to school procedures. Enter and submit an electronic referral form with incident information to be reviewed by a trained SWIS reviewer. Respond to follow-up communication as needed to finalize referral record.

**Access**
- Draft and submit major and minor referral records electronically, typically to be reviewed for approval by a trained SWIS Admin or Data Entry user

Limit to staff with access to computers & moderate technology skills

SWIS User Access Level Descriptions

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>SWIS Admin* FT</td>
<td>The role of SWIS Administrator is typically limited to one or two school/facility personnel who are responsible for managing the SWIS account (e.g., PBIS team leader, school administrator, administrative professional).</td>
</tr>
<tr>
<td>Data Entry* FT</td>
<td>The role of data entry is typically limited to one or two staff members who enter referral data, maintain person records, enter school days &amp; enrollment, and/or monitor data integrity.</td>
</tr>
<tr>
<td>Data Analyst FT</td>
<td>The role of data analyst is typically limited to one or two individuals who are responsible for monitoring data integrity and generating SWIS reports for decision making teams within the school/facility or district (e.g., PBIS team leader, administrator, school psychologist, special education representatives, clergy).</td>
</tr>
<tr>
<td>Referral Entry Only</td>
<td>The role of Referral Entry Only allows staff access to log in for the purpose of completing the online referral form. Referrals are then assigned to another staff member or submitted for review by a trained user with Admin or Data Entry access.</td>
</tr>
<tr>
<td>IT Data Manager</td>
<td>The role of IT data manager is typically limited to one or two individuals who are responsible for managing the use of Person Import or other data integration strategies.</td>
</tr>
</tbody>
</table>

*Users with this access level may be added as reviewers for schools enabling Referral Workflows.
FT: Users with this access level must be trained by a certified SWIS Facilitator.
### SWIS User Access to Functionality

<table>
<thead>
<tr>
<th>Action</th>
<th>SWIS Admin</th>
<th>Data Entry</th>
<th>Data Analyst</th>
<th>IT Data Manager</th>
<th>Referral Entry Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>View SWIS Dashboard</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter Referrals</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate All Reports</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Including Staff Report</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate Most Reports</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Excluding Staff Report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit all School Settings</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Most School Settings Excluding Custom Fields or Referral Workflow Setting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Core Data in School Settings Only Enrollment &amp; School Days</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Person Records in Person Management</td>
<td></td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invite and Manage Referral Entry Only Users</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add/Update Reviewers</td>
<td></td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate Student Dashboard</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generate Data Integrity Tool</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resolve Data Integrity Errors</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Execute Person Import</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Data Integrity & Confidentiality

- Data Integrity & Confidentiality
- Data Integrity
- Confidentiality

---

Swift @ SWIS Activity Packet July 2021
Who Will Have Access to SWIS data?

- Direct access to log into SWIS is limited to 3-5 individuals who are responsible for managing the account, entering and reviewing referral data, and analyzing data to share with staff (e.g., behavior team, administrator, grade-level meetings).
- Access to SWIS Reports is limited only by local policies and procedures. A staff member will be designated to generate and share reports upon request (please request at least 48 business hours before data are needed).

What is Data Integrity?

Data Integrity
- Maintaining the accuracy and consistency of data over its entire life cycle
- Critical aspect to the design, implementation, and usage of any system that stores, processes, or retrieves data

For data to be useful, it should match overall perceptions across staff, students, and families.

- Accurate Data
- Better Assumptions
- Good Decisions

What is Confidentiality?

Data Confidentiality
- Protection of potentially identifiable information
- (In SWIS):
  - Person-identifiable
  - Site/Building-identifiable
  - Account access
- Data about staff and students are highly confidential
- Regular review of district policies related to student, staff, and school-level data
- Passwords/User Account are confidential
- PBISApps will automatically log users out after 10 minutes
Section C: Reflection

1. How will data integrity be maintained and prioritized in staff communications?

2. How will we maintain the confidentiality of SWIS data while also giving the right people access to the right information for decision-making?
Section C: Roles & Access Levels
Reflection on Data Integrity and Confidentiality

1. How will data integrity be maintained and prioritized in staff communications?

2. How will we maintain the confidentiality of SWIS data while also giving the right people access to the right information for decision-making?
Section D

SWIS Account Set-Up (Tools)

Purpose and Objectives

- **Purpose:** To describe the tools available to manage SWIS School Settings, Account Settings, and Person Records

- **Learner Objectives:**
  1. Practice managing the School Settings
  2. Practice managing a User’s Account Settings
  3. Practice maintaining student and staff records in Person Management
  4. Practice using Data Integrity to identify missing and inaccurate data

Account Set-Up/Tools Activity

- As we walk through the SWIS tools we’ll complete the activity in your packet.
  1. What role or access level is needed?
  2. Who is that in our school?
  3. That person will complete the task (if present)
What are Account Settings?

Account Settings allow an individual user to update profile information as well as personalize application settings to accommodate data entry or reporting preferences.

- **Account Profile**
  - name, email, password

- **Application**
  - General – Name order
  - SWIS - defaults

What are School Settings?

School Settings allow schools (or other educational programs) to customize a set of features within the SWIS Suite to address local decision-making needs.

- **School Profile & Contact Information**
- **Core Data**
  - Days, Enrollment, Ethnicity
- **Application**
  - General, SWIS, CICS
- **Data Integrity**
Who can access School Settings?

Access to the School Settings is limited to those who need to be able to make changes to the school’s SWIS account.

Which users are involved?

**SWIS Admin**
- 1-2 staff members who broadly manage the SWIS Suite Account
- Control of all School Settings

**Data Entry**
- 2-3 staff members whose responsibilities include data entry
- Ad hoc control of School Calendar & Enrollment

School Settings Video Tutorial

A PBISApps How-To

Settings in SWIS

https://www.pbisapps.org/Resources/Pages/Settings-IN-SWIS.aspx

Custom Fields Video Tutorial

A PBISApps How-To

Create and Use Custom Fields

https://www.pbisapps.org/Resources/Pages/Create-and-Use-Custom-Fields.aspx
What is User Management?

User Management is a tool that allows SWIS Admin users to monitor current school users and to set up staff with Referral Entry Only access to the electronic referral form. Other users are trained and managed by the SWIS facilitator in SAMI.

- Name
- Username/Email
- Role/Access to SWIS, CICO-SWIS, or I-SWIS
- Last Login Date and Time

What is Person Management?

Person Management allows schools to organize and manage student, staff, and non-staff records associated with SWIS Suite data.

- Student name, ID, gender, ethnicity, race, 504 status, IEP status
- Staff name, ID, email
- Non-Staff name, email

Person Management: Students Video Tutorial

A PBISApps How-To

Managing Students in Person Management

https://www.pbisapps.org/Resources/Pages/Managing-Students-in-Person-Management-How-To.aspx
What is Data Integrity?

- For data to be useful, it should match overall perceptions across staff, students, and families.
- Staff training and buy-in are key!
- The SWIS Suite Data Integrity tool will assist in identification of duplicate or missing information.

Accurate Data  Better Assumptions  Good Decisions
### Section D: SWIS Account Set-Up (Tools)

**Exploration in the Facilitator Training Account**

**Facilitator Training Account.** Username: facilitator  
Password: __________________________

**Settings.** Together we’ll explore functionality in the **School Settings** as if you were an Admin user and look at **Account Settings** that all users will manage. Each person will identify which access level can complete the task in a real/live account. Then one person will be assigned to complete the task.

*Hint: School Settings are school-wide and Account Settings are user-specific.*

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
<th>Who Has Access?</th>
</tr>
</thead>
</table>
| 1  | The school changed their grade levels. Update the account to change the grades to either K-12 or your school’s grade range. | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
| 2  | Due to missed school days during the winter *(already recorded in SWIS)*, the school is extending the school year by 3 student contact days. Update the account to reflect the added days (pick any month you want). | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
| 3  | The school-wide team has determined the following updates are appropriate. Update the account.  
  a. Both a primary and up to two additional behaviors will be recorded (as appropriate)  
  b. Up to 3 Actions Taken can be indicated on the referral  
  c. 504 information will not be recorded in SWIS, but IEP information will be  
  d. District ID’s for both staff and students are required | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
| 4  | The data entry staff prefers to view students by first name then last name. The data analysts prefer last name then first.  
  a. Can we have it both ways?  
  b. Can one user set this up for another user? | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
| 5  | The school-wide team has determined that they want to track types of Harassment within SWIS. Enable harassment sub-types. *(Keep default categories)* | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
| 6  | Update SWIS to show that the school year starts in August. | □ SWIS Admin  
□ SWIS Data Entry  
□ Both Admin and D.E.  
□ All access levels except REO  
□ All access levels |
You decide that you prefer both referral entry and reports to default to Major referrals. Update your settings.

- SWIS Admin
- SWIS Data Entry
- Both Admin and D.E.
- All access levels except REO
- All access levels

### Person Management
Next we’ll explore **Person Management** as if you were an Admin or Data Entry user. We will discuss the procedures then someone will be assigned to complete the task. Make up any information that is not provided.

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Codi Franks is a student in the 6th grade. His district ID is 10744 and his enrollment records indicate his race and ethnicity as White, Not Hispanic Latino. Codi has a 504.</td>
</tr>
<tr>
<td>2</td>
<td>Janice Bowman is a teacher at the school. Her name recently changed to Janice Mulligan. What is the most efficient way to update SWIS?</td>
</tr>
<tr>
<td>3</td>
<td>Danny Kay received a referral. This is his first referral since coming to the school. Danny’s full name is: Daniel Kay. Danny’s District ID is: 60215. Ethnicity/Race: Hispanic/Latino, America Indian. Danny has an IEP under the category of “Orthopedic Impairment”</td>
</tr>
<tr>
<td>4</td>
<td>Sam Neeten moved to another school in the district. The same thing happened last year but Sam ended up re-enrolling. What should you do to update SWIS?</td>
</tr>
<tr>
<td>5</td>
<td>(Everyone) Enter three new students and two new staff members. *Make up their information.</td>
</tr>
<tr>
<td>6</td>
<td>John Candy and Samual Fullerton have graduated from the school. Update the status of both students.</td>
</tr>
</tbody>
</table>

### Data Integrity
Next we’ll explore **Data Integrity** as if you were an Admin or Data Entry user. We will discuss the procedures then someone will be assigned to complete the task. Make up any information that is not provided.

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>When checking Data Integrity for the school’s account, indicate that SWIS should ignore errors in all categories prior to September 1st of last year.</td>
</tr>
<tr>
<td>2</td>
<td>Open the Data Integrity tool. Are there errors related to Staff and/or Student records? If so fix at least three of these errors.</td>
</tr>
</tbody>
</table>

---

Remember to log out as soon as you finish your SWIS-related tasks!
Referral Data Entry & Review

Purpose and Objectives

- **Purpose:** To identify the procedures for entering and reviewing referral data in SWIS
- **Learner Objectives:***
  1. Describe the importance of carefully reviewing referral data for accuracy and completion before entering into SWIS records
  2. Identify basic features of referral entry in SWIS
  3. Practice entering referral data into the Facilitator Training Account

What is SWIS Data Entry?

SWIS Data Entry was designed to allow schools/programs to collect the critical components (who, what, when, where, why) of a **problem incident**.

- Referral Type – major or minor
- Who – Student record, grade, IEP/504 status, (observing) staff, others involved
- When – date & time the incident occurred
- Where – location
- What – behavior, Action Taken, seclusion/restraint
- Why – Perceived Motivation
- Other Info – custom fields, notes
Who enters data into SWIS?

Staff observe a problem incident → Referral Form Completed → Paper or Electronic Referral Form → Trained user reviews and enters or accepts data.

Data Entry User

- Trained to enter data collected on paper referral forms into SWIS
- Often responsible for reviewing referrals for accuracy and completion as well as follow-up as needed (directly with staff or via an administrator)

Entering Referrals Video Tutorial

A PBISApps How-To

Entering Referrals

https://www.pbisapps.org/resource/entering-referrals
What is Referral Management?

Referral Management is a tool that facilitates referral workflows and the management of draft referrals. It is an efficient interface for reviewing referrals and then saving them as complete, editing them, or reassigning them as needed for follow-up work.

Draft Management

- Draft referrals allow a referral to be created and finished later.
- This feature is available even if workflows are disabled.
- Referrals are only visible to the user who saved them.

Note: A draft referral older than 30 days will be purged automatically.

Referral Review Management

- Workspace for managing a school's referrals.
- Non-reviewers (REO users) can send an incomplete referral to another staff member to finish.
- Reviewers (PBIS SWIS Admin or Data Entry) can view, edit, save as complete, and/or re-assign the referrals.

Note: A referral can never be modified by anyone other than the person to which the referral is assigned.
Referral Management Tool

Review submitted referrals

New Feature!
Section E: Referral Data Entry & Review

Entering Referral Data into SWIS

Facilitator Training Account:
Username: facilitator  Password: ____________________________

Data Entry. Each person will enter the referrals on the following pages into SWIS. You will be creating duplicate records but that’s okay (we can practice fixing data integrity errors later).

Try to go slowly through the first one or two and then speed up. A highly fluent data entry user can enter a basic referral in under 40 seconds.

☐ Referral A
☐ Referral B
☐ Referral C1 (Use the Save & Copy button instead of the Save button)
☐ Referral C2
☐ Referral D

Discuss as a group

1. How will we ensure that data stay accurate and up-to-date?

2. What procedures are needed to support staff to consistently respond to and document problem behavior?

3. If referral data are incomplete, inaccurate, or unprofessional (e.g., emotionally inflated) who will follow-up with the reporting staff member?
**Minor Referral**
- Staff Managed

**Major Referral**
- Administrator Managed

**Entered into SWIS:** ☐ Yes ☐ No

**Referral ID:** __ __ __ __ __ __ __ __

**Student:**
* Sara Milton

**Grade:** ☑ 2 ☐ 3 ☐ 4 ☐ 5

**Date:**
2 days ago

**Time:**
1:10 PM

**Location:**
☐ Classroom ☒ Hallway ☐ Playground ☐ Cafeteria ☐ Gym ☐ Commons ☐ Restroom
☐ Art Room ☐ Library ☐ Music Room ☐ Computer Lab ☐ Office ☐ Assembly/Field Trip ☐ Bus
☐ Bus Loading Zone ☐ Off-Campus ☐ Parking Lot

**Minor Problem Behavior:**
- ☐ Disrespect
- ☐ Defiance
- ☒ Disruption
- ☐ Physical Contact/Physical Aggression
- ☐ Tardy
- ☐ Inappropriate Language
- ☐ Property Misuse
- ☐ Dress Code Violation
- ☐ Technology Violation

**Major Problem Behavior:**
- ☐ Defiance/Non-Compliance
- ☐ Physical Aggression
- ☐ Disruption
- ☐ Disrespect
- ☐ Inappropriate Language
- ☐ Tardy
- ☐ Skip Class
- ☐ Bullying
- ☐ Fighting
- ☐ Inappropriate Location
- ☐ Truancy
- ☐ Forgery/Theft/Plagiarism
- ☐ Lying/Cheating
- ☐ Dress Code Violation
- ☐ Inappropriate Display of Affection
- ☐ Gang Affiliation Display
- ☐ Bomb Threat/False Alarm
- ☐ Arson
- ☐ Use/Possession of (circle one): Tobacco Drugs ☒ *Weapons Combustibles Alcohol

*If a weapon was involved, please note the weapon type: ________________________________

☐ Harassment (circle type): Gender Ethnicity Sexual Race Religion Disability Physical Characteristics

**Perceived Motivation:**
- ☒ Obtain Peer Attention
- ☐ Obtain Adult Attention
- ☐ Obtain Item/Activity
- ☐ Avoid Peer(s)
- ☐ Avoid Adult
- ☐ Avoid Task/Activity

**Others Involved:**
☐ None ☐ Peers ☐ Teacher ☐ Staff ☐ Substitute ☐ Other ☐ Unknown

**Action Taken:**
- ☐ Alternative Placement
- ☐ Time Out/Detention
- ☐ Conference with Student
- ☒ Loss of Privilege
- ☐ Time in Office
- ☐ Individualized Instruction
- ☐ Additional Attendance/Saturday School
- ☐ Bus Suspension
- ☐ Restitution
- ☐ Community Service
- ☐ Other Action Taken
- ☐ Parent Contact (form: ______________________)

☐ In-School Suspension (½ day increments): ___.___ days
☐ Out-of-School Suspension: (½ day increments): ___.___ days
☐ Expulsion

**Notes:**
_______________________________________________________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
_____________________________________________________________________________________________
<table>
<thead>
<tr>
<th>Minor Referral</th>
<th>Major Referral</th>
<th>Entered into SWIS:</th>
<th>Referral ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student:</th>
<th>Grade:</th>
<th>Referring Staff:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aniya Laramie</td>
<td>☐ 6 ☐ 7 ☐ 8</td>
<td>Thomas Martin</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date:</th>
<th>Time:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>2:45 PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location:</th>
<th>Minor Problem Behavior:</th>
<th>Major Problem Behavior:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom</td>
<td>☐ Disrespect ☐ Defiance ☐ Disruption ☐ Physical Contact/Physical Aggression</td>
<td>☐ Defiance/Non-Compliance ☐ Physical Aggression ☐ Disruption ☐ Disrespect</td>
</tr>
<tr>
<td>Hallway</td>
<td>☐ Tardy ☐ Inappropriate Language ☐ Property Misuse ☐ Dress Code Violation ☐ Technology Violation</td>
<td>☐ Tardy ☐ Skip Class ☐ Bullying ☐ Fighting ☐ Inappropriate Location ☐ Truancy</td>
</tr>
<tr>
<td>Playground</td>
<td>☐ Forgery/Theft/Plagiarism ☐ Lying/Cheating ☐ Dress Code Violation ☐ Inappropriate Display of Affection</td>
<td>☐ Forgery/Theft/Plagiarism ☐ Lying/Cheating ☐ Dress Code Violation ☐ Inappropriate Display of Affection</td>
</tr>
<tr>
<td>Cafeteria</td>
<td>☐ Gym ☐ Commons ☐ Restroom</td>
<td>☐ Gang Affiliation Display ☐ Bomb Threat/False Alarm ☐ Arson</td>
</tr>
<tr>
<td>Gym</td>
<td>☐ Art Room ☐ Library ☐ Music Room ☐ Computer Lab ☐ Office ☐ Assembly/Field Trip ☐ Bus</td>
<td>☐ Use/Possession of (circle one): Tobacco Drugs ☐ *Weapons ☐ Combustibles ☐ Alcohol</td>
</tr>
<tr>
<td>Common</td>
<td>☐ Bus Loading Zone ☐ Off-Campus ☐ Parking Lot</td>
<td>☐ Use/Possession of (circle one): Tobacco Drugs ☐ *Weapons ☐ Combustibles ☐ Alcohol</td>
</tr>
</tbody>
</table>

*If a weapon was involved, please note the weapon type: _________________________________________________

<table>
<thead>
<tr>
<th>Harassment (circle type):</th>
<th>Perceived Motivation:</th>
<th>Others Involved:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Gender ☐ Ethnicity ☐ Sexual ☐ Race ☐ Religion ☐ Disability ☐ Physical Characteristics</td>
<td>☐ Obatin Peer Attention ☐ Obtain Adult Attention ☐ Obtain Item/Activity</td>
<td>☐ None ☐ Peers ☐ Teacher ☐ Staff ☐ Substitute ☐ Other ☐ Unknown</td>
</tr>
<tr>
<td>☐ Avoid Peer(s) ☐ Avoid Adult ☐ Avoid Task/Activity</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Action Taken:</th>
<th>Action Taken:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Alternative Placement ☐ Time Out/Detention ☐ Conference with Student ☐ Loss of Privilege</td>
<td>☐ Conference with Student ☐ Loss of Privilege</td>
</tr>
<tr>
<td>☐ Time in Office ☐ Individualized Instruction ☐ Additional Attendance/Saturday School ☐ Bus Suspension</td>
<td>☐ Time in Office ☐ Individualized Instruction ☐ Additional Attendance/Saturday School ☐ Bus Suspension</td>
</tr>
<tr>
<td>☐ Restitution ☐ Community Service ☐ Other Action Taken</td>
<td>☐ Restitution ☐ Community Service ☐ Other Action Taken</td>
</tr>
<tr>
<td>☐ Parent Contact (form: ☐ phone call ☐ ☐ ☐ ☐ )</td>
<td>☐ Parent Contact (form: ☐ phone call ☐ ☐ ☐ ☐ )</td>
</tr>
<tr>
<td>☐ In-School Suspension ( ½ day increments): <em><strong>.</strong></em> days ☐ Out-of-School Suspension: ( ½ day increments): <em><strong>.</strong></em> days</td>
<td>☐ In-School Suspension ( ½ day increments): <em><strong>.</strong></em> days ☐ Out-of-School Suspension: ( ½ day increments): <em><strong>.</strong></em> days</td>
</tr>
<tr>
<td>☐ Expulsion</td>
<td>☐ Expulsion</td>
</tr>
</tbody>
</table>

**Notes:** Aniya mocked another student's religion by using the photographs in non-fiction, religious library books to ask if the student was related to the “weird” and “strange” people in the pictures. She repeatedly asked the student what animal he worshiped.
Minor Referral □  Major Referral □
Staff Managed □  Administrator Managed □

Entered into SWIS: □ Yes  □ No
Referral ID: __________________________

Student: Winston Weller
Grade: □ K  □ 1  □ 2  □ 3  □ 4  □ 5

Date: Yesterday
Time: 11:30 AM

Location: Classroom □  Hallway □  Playground □  Cafeteria □  Gym □  Commons □  Restroom
Art Room □  Library □  Music Room □  Computer Lab □  Office □  Assembly/Field Trip □  Bus
Bus Loading Zone □  Off-Campus □  Parking Lot

Minor Problem Behavior: □ Disrespect □ Defiance □ Disruption □ Physical Contact/Physical Aggression
□ Tardy □ Inappropriate Language □ Property Misuse □ Dress Code Violation □ Technology Violation

Major Problem Behavior: □ Defiance/Non-Compliance □ Physical Aggression □ Disruption □ Disrespect
□ Inappropriate Language □ Tardy □ Skip Class □ Bullying □ Fighting □ Inappropriate Location □ Truancy
□ Forgery/Theft/Plagiarism □ Lying/Cheating □ Dress Code Violation □ Inappropriate Display of Affection
□ Gang Affiliation Display □ Bomb Threat/False Alarm □ Arson
□ Use/Possession of (circle one): Tobacco □ Drugs □ *Weapons □ Combustibles □ Alcohol
*If a weapon was involved, please note the weapon type: _________________________________________________
□ Harassment (circle type): Gender □ Ethnicity □ Sexual □ Race □ Religion □ Disability □ Physical Characteristics

Perceived Motivation: □ Obtain Peer Attention □ Obtain Adult Attention □ Obtain Item/Activity
□ Avoid Peer(s) □ Avoid Adult □ Avoid Task/Activity

Others Involved: □ None □ Peers □ Teacher □ Staff □ Substitute □ Other □ Unknown

Action Taken: □ Alternative Placement □ Time Out/Detention □ Conference with Student □ Loss of Privilege
□ Time in Office □ Individualized Instruction □ Additional Attendance/Saturday School □ Bus Suspension
□ Restitution □ Community Service □ Other Action Taken □ Parent Contact (form: __________________________)
□ In-School Suspension (½ day increments): ___.___ days □ Out-of-School Suspension: (½ day increments): ___.___ days
□ Expulsion

Notes: Winston and another student got into an argument during a basketball game on the playground. They disagreed about a foul and became physically aggressive. Both students pushed, shoved, threw the ball at the other person, and used inappropriate language. Both students will lose recess privileges for 5 days.
Minor Referral
Staff Managed

Major Referral
Administrator Managed

Entered into SWIS: [ ] Yes [ ] No

Referral ID: __ __ __ __ __ __

Student: Justin Burbanks

Grade: [ ] K [ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5

Referring Staff: Kathy Holland

Date: Yesterday

Time: 11:30 AM

Location: [ ] Classroom [ ] Hallway [x] Playground [ ] Cafeteria [ ] Gym [ ] Commons [ ] Restroom [ ] Art Room [ ] Library [ ] Music Room [ ] Computer Lab [ ] Office [ ] Assembly/Field Trip [ ] Bus [ ] Bus Loading Zone [ ] Off-Campus [ ] Parking Lot

Minor Problem Behavior: [ ] Disrespect [ ] Defiance [ ] Disruption [ ] Physical Contact/Physical Aggression [ ] Tardy [ ] Inappropriate Language [ ] Property Misuse [ ] Dress Code Violation [ ] Technology Violation

Major Problem Behavior: [ ] Defiance/Non-Compliance [ ] Physical Aggression [ ] Disruption [ ] Disrespect [ ] Inappropriate Language [ ] Tardy [ ] Skip Class [ ] Bullying [ ] Fighting [ ] Inappropriate Location [ ] Truancy [ ] Forgery/Theft/Plagiarism [ ] Lying/Cheating [ ] Dress Code Violation [ ] Inappropriate Display of Affection [ ] Gang Affiliation Display [ ] Bomb Threat/False Alarm [ ] Arson [ ] Use/Possession of (circle one): Tobacco [ ] Drugs [ ] *Weapons [ ] Combustibles [ ] Alcohol

*If a weapon was involved, please note the weapon type: ____________________________

[ ] Harassment (circle type): Gender [ ] Ethnicity [ ] Sexual [ ] Race [ ] Religion [ ] Disability [ ] Physical Characteristics

Perceived Motivation: [ ] Obtain Peer Attention [ ] Obtain Adult Attention [ ] Obtain Item/Activity [ ] Avoid Peer(s) [ ] Avoid Adult [ ] Avoid Task/Activity

Others Involved: [ ] None [ ] Peers [ ] Teacher [ ] Staff [ ] Substitute [ ] Other [ ] Unknown

Action Taken: [ ] Alternative Placement [x] Time Out/Detention [ ] Conference with Student [ ] Loss of Privilege

[ ] Time in Office [ ] Individualized Instruction [ ] Additional Attendance/Saturday School [ ] Bus Suspension

[ ] Restitution [ ] Community Service [ ] Other Action Taken [x] Parent Contact (form: ______ conference ______)

[ ] In-School Suspension (½ day increments): ___.___ days [ ] Out-of-School Suspension: (½ day increments): ___.___ days [ ] Expulsion

Notes: Justin and another student got into an argument during a basketball game on the playground. The disagreed about a foul and became physically aggressive. Both students pushed, shoved, threw the ball at the other person, and used inappropriate language. Both students will lose recess privileges for 5 days.
**Minor Referral**
- Staff Managed

**Major Referral**
- Administrator Managed

**Entered into SWIS:**
- Yes
- No

**Referral ID:** __ __ __ __ __ __ __ __

**Student:**
- Keri Floyd

**Grade:**
- 9
- 10
- 11
- 12

**Referring Staff:**
- Kathy Holland

**Date:**
- 4 days ago

**Time:**
- 8:50 AM

**Location:**
- Classroom
- Hallway
- Playground
- Cafeteria
- Gym
- Commons
- Restroom
- Art Room
- Library
- Music Room
- Computer Lab
- Office
- Assembly/Field Trip
- Bus
- Bus Loading Zone
- Off-Campus
- Parking Lot
- Locker Room

**Minor Problem Behavior:**
- Disrespect
- Defiance
- Disruption
- Physical Contact/Physical Aggression
- Tardy
- Inappropriate Language
- Property Misuse
- Dress Code Violation
- Technology Violation

**Major Problem Behavior:**
- Defiance/Non-Compliance
- Physical Aggression
- Disruption
- Disrespect
- Inappropriate Language
- Tardy
- Skip Class
- Bullying
- Fighting
- Inappropriate Location
- Truancy
- Forgery/Theft/Plagiarism
- Lying/Cheating
- Dress Code Violation
- Inappropriate Display of Affection
- Gang Affiliation Display
- Bomb Threat/False Alarm
- Arson

*If a weapon was involved, please note the weapon type: _________________________________________________

**Harassment (circle type):**
- Gender
- Ethnicity
- Sexual
- Race
- Religion
- Disability
- Physical Characteristics

**Perceived Motivation:**
- Obtain Peer Attention
- Obtain Adult Attention
- Obtain Item/Activity
- Avoid Peer(s)
- Avoid Adult
- Avoid Task/Activity

**Others Involved:**
- None
- Peers
- Teacher
- Staff
- Substitute
- Other
- Unknown

**Action Taken:**
- Alternative Placement
- Time Out/Detention
- Conference with Student
- Loss of Privilege
- Time in Office
- Individualized Instruction
- Additional Attendance/Saturday School
- Bus Suspension
- Restitution
- Community Service
- Other Action Taken
- Parent Contact (form: ____________________)

**In-School Suspension (½ day increments):** ___.___ days

**Out-of-School Suspension (½ day increments):** ___.___ days

**Expulsion**

**Notes:** Keri was skipping 1st period and was caught in the locker room with cigarettes and a lighter.
Section F

SWIS Basic Reporting & Analysis

Purpose and Objectives

- **Purpose:** To introduce the basic reporting options in SWIS and how to identify potential problems
- **Learner Objectives:**
  1. Describe the role of a data analyst
  2. Identify the functionality of SWIS Core and Additional Reports
  3. Practice generating Core and Additional reports in the SWIS Demo account
  4. Briefly introduce the Student Dashboard and Drill Down tools

“Drill Down” Approach

The **Drill Down** approach starts with the big picture and looks for potential “red flags” that might indicate a problem that might need to be addressed. Then we identify and address the problem context and finally the function

1. What is our current **reality** or big picture?
2. Is there a **problem** (red flag)?
3. What is the precise **context & function** of the problem?

What, where, when, who, how often, why?

Be efficient, don’t “drown” by getting too specific (e.g., red heads with blue shoes)
What is a Data Analyst?

SWIS Data Analysts analyze, interpret and share SWIS reports and information with teams and individuals who use data for decision making.

- SWIS Core Reports
- SWIS Additional Reports
- SWIS Student Dashboard
- SWIS Data Integrity tool
- SWIS Drill Down tool

Data Analyst and The Game of Clue

The Data Analyst is like a detective who follows clues to isolate a problem context and function until it is precise but still socially important to address.

Where’s the Data?

Analyze Reports
Bring summary statement & key graphs
Team meeting begins with review
What do Data Analysts do?

- Generate SWIS Core Reports at least monthly
- Drill down into potential system-level problems for precision
- Provide relevant graphs & summaries to the team before/during monthly decision-making meetings
- Monitor data integrity
- Generate ad hoc reports upon request (e.g., grade-level teams, parent-teacher conference)

Basic Reports Video Tutorial

https://www.pbisapps.org/Resources/Pages/Reports-available-in-swis.aspx

Activity: SWIS Basic Reporting & Analysis

- Let’s explore the SWIS Reports together!
- As we look through a sample of the reports we’ll complete the worksheet provided in your packet.
- Let’s stay together so we end up with similar or the same information in our worksheets.
Navigation Demonstration

SWIS Reports

SWIS Dashboard

- Dashboard Reports
  - Overview of current school year
  - Average Referrals Per Day Per Month
  - Referrals by Time
  - Referrals by Location
  - Referrals by Day of Week
  - Referrals by Grade
  - Referrals by Problem Behavior

- Latest Referrals
- Data Integrity Summary

SWIS Dashboard Video Tutorial

A PBISApps How-To

Using the SWIS Dashboard

### SWIS Core Reports

Core Reports are analyzed at least monthly at team meetings.

**Date Range:** Typically the most recent one or two months

**Purpose:** To take the “pulse” of the school climate and identify potential problems (i.e., red flags).

### Core SWIS Reports (Demonstration Prompts)

### SWIS Additional Reports

- **Date Range:** Varies by report and local context
- **Purpose:** Additional Reports provide perspectives and summaries for a more balanced perspective of school climate and problem behavior

- **Multi-Year reports:** quarterly or as needed
- **Staff Report:** Restricted to SWIS Admin for coaching and support
- **Suspension/Expulsion:** Quarterly
- **Ethnicity Reports:** Quarterly
- **Triangle & Year End:** Annually for long-term action planning
The Student Dashboard provides a set of reports for an individual student (parent-teacher conference, consideration for additional supports, school transcript).

https://www.pbisapps.org/Resources/Pages/Generate-print-reports-how-to.aspx
Section F: SWIS Basic Reporting & Analysis
Exploring SWIS Reports

In the SWIS Demo Account, explore the SWIS Core Reports and respond to each item below.

1. Generate the Average Referrals Per Day Per Month report. For the current* school year, describe the levels, trends, and peaks for Major Referrals.
   *Use previous year if there are fewer than 2 months with data.

<table>
<thead>
<tr>
<th>School Year</th>
<th>Trends</th>
<th>Peaks</th>
<th>Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. What were the most recently referred problem behaviors (All Referrals)? You will use this as a “red flag” in the next activity (Drill Down 1).

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Behavior(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. What campus location have staff recently observed and reported problem behaviors (All Referrals)? You will use this as a “red flag” in the next activity (Drill Down 2).

<table>
<thead>
<tr>
<th>Date Range</th>
<th>Location(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Identify how many students have received 2-5 referrals and how many have received six or more referrals (All Referrals) in the last three months.

   **2-5 Referrals:** _______________ students  
   **6+ Referrals:** _______________ students

5. Which grade level(s) have recently been referred most often for problem behavior in the last three months?

   **Date Range:** _______________  
   **Grade Level:** _______________
Section G

SWIS Drill Down Tool

Purpose and Objectives

- **Purpose**: To provide a comprehensive training on the use of the SWIS Drill Down tool for identifying the context and perceived motivation of a potential problem (usually at the systems level)
- **Learner Objectives**:
  1. Identify potential “red flags” from Core and Additional SWIS reports
  2. Locate and use the SWIS Drill Down worksheet to record the data analysis steps taken
  3. Use the Drill Down functionality to isolate the context and perceived motivation of a “red flag”
  4. Summarize a precise problem statement for decision-making teams

“Drill Down” Approach

The **Drill Down** approach starts with the big picture and looks for potential “red flags” that might indicate a problem that might need to be addressed. Then we identify and address the problem context and finally the function.

1. What is our current **reality** or big picture?
2. Is there a **problem** (red flag)?
3. What is the precise **context & function** of the problem?

   - What, where, when, who, how often, why?
   - Be efficient, don’t “drown” by getting too specific (e.g., red heads with blue shoes)
The Data Analyst is like a detective who follows clues to isolate a problem context and function until it is precise but still socially important to address.

What do Data Analysts do?

- Generate SWIS Core Reports at least monthly
- Drill down into potential system-level problems for precision
- Provide relevant graphs & summaries to the team before/during monthly decision-making meetings
- Monitor data integrity
- Generate ad hoc reports upon request (e.g., grade-level teams, parent-teacher conference)

Where’s the Data?

- Analyze Reports
- Bring summary statement & key graphs
- Team meeting begins with review
The SWIS Drill Down Worksheet is a tool used by Data Analysts to:
- Record the steps followed during Drill Down
- Identify potential filters that were too narrow or too broad (to back-track)

Looking for Red Flags

SWIS Core Reports
Helps check the current vital signs of the school
Helps identify areas for further inquiry

Referrals By Location

Questions to ask about Referrals by Location
- Where are the problems occurring?
- Are there problems in:
  - one or many locations?
  - clusters of locations?
Referrals By Problem Behavior

Questions to ask about Referrals by Problem Behavior

- Is there one major problem behavior or multiple problem behaviors?
- Do they appear to be student-to-student or student-to-adult?
- Are there similarities in the types of behaviors?
- Are they major or minor problem behaviors?

Drill Down Video Tutorial

A PBISApps How-To

Data Drill Down (Custom Reports)

https://www.pbisapps.org/Resources/Pages/Data‐Drill‐Down‐How‐To.aspx

Summarizing Data for Team/Others

Recommendations

- Current Core Reports
- Scheduled Additional Reports
- Old Problems: Updated data for previously discussed problems
- New Problems: 1-2 precise problem statements based on drill down
- Drill Down graphs of interest (especially if a pattern was less clear or you made a specific judgment call)
Big Idea About Sharing Data

Know your audience
- What does the team need to know to make good decisions?
- What do staff need to know? Is there anything they need to do?
- Who else would benefit from seeing an update on student behavior (i.e., students, families, parent group)?

Tell the story
Help paint the picture with data: What, where, when, who, how often, why?

Team Follow-Up: Goals & Solutions

School-Wide or System-Level Problems

Data Analyst
- Identify Red Flags
- Drill Down to precision
- Summarize (precise statement & supporting graphs)

Team
- Prioritize problems
- Develop goal
- Develop solutions & action plan

Student, Group, or Grade-Specific Problems

Data Analyst
- Identify Red Flags
- Drill Down to precision
- Summarize (precise statement & supporting graphs)
- Share with appropriate staff members or administrator
- Potentially support goal & solution development
Drill Down 1 – Everyone will record the same information from the Harbor Haven simulation.

Red flag item is identified by analyzing Core Reports (*most common*), Additional Reports, Student Dashboard, or SWIS Dashboard (*less common/less preferred*). **Reminder:** Add filters one at a time.

<table>
<thead>
<tr>
<th>Red flag item:</th>
<th>Date Range:</th>
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<tbody>
<tr>
<td>Playground/Common areas (2 filters)</td>
<td>The last 6 weeks</td>
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<table>
<thead>
<tr>
<th>Drill-Down Filter(s):</th>
<th>Is the problem best addressed through systems or with individual students:</th>
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<tbody>
<tr>
<td>Who?</td>
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<td>When?</td>
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<td>Where?</td>
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<td>Why?</td>
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<table>
<thead>
<tr>
<th>Referral Summary:</th>
<th>Precise Problem Statement:</th>
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<tbody>
<tr>
<td>Number of students involved: ________</td>
<td>Goal:</td>
</tr>
<tr>
<td>Number of referrals included: ________</td>
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<table>
<thead>
<tr>
<th>Solution Components</th>
<th>What are the action steps?</th>
<th>Who is Responsible?</th>
<th>By When?</th>
<th>How will fidelity be measured?</th>
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<th>Data Collection</th>
<th>What data will we look at?</th>
<th>Who is responsible for gathering data?</th>
<th>When/How often will data be gathered?</th>
<th>Where will data be shared?</th>
<th>Who will see the data?</th>
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**Section G: SWIS Drill Down & Analysis**

*Exploring SWIS Drill Down Tool*
Drill Down 2 - Use your assigned red flag to conduct a drill down independently.

Red flag item is identified by analyzing Core Reports (most common), Additional Reports, Student Dashboard, or SWIS Dashboard (less common/less preferred). **Reminder:** Add filters one at a time.

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<td>Number of referrals included: _______</td>
<td>Systems (10+)</td>
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**Precise Problem Statement:**

**Goal:**

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Drill Down 3 – Ethnicity Drill Down. Identify the group most at risk and complete a drill down to find out one specific context where there is disproportionality.

Red flag item is identified by analyzing Core Reports *(most common)*, Additional Reports, Student Dashboard, or SWIS Dashboard *(less common/less preferred)*. **Reminder:** Add filters one at a time.

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**Referral Summary:**
- Number of students involved: ________
- Number of referrals included: ________
- Is the problem best addressed through systems or with individual students: ☐ Systems (10+) ☐ Students (<10)

**Precise Problem Statement:**

**Goal:**

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Wrapping Up

*Swift at SWIS Exit Activity*

Carefully remove both the exit activity and following evaluation from your packet. Complete each item with as much or little detail.

**Name:** _____________________________________

**Stars:** What was the most helpful activity during this training?

- [ ] We accomplished our objectives
- [ ] This was a good use of my time
- [ ] I am comfortable taking on this role

**Stairs:** What more do I need to feel confident in my role as a SWIS ____________(fill in your role) user?

Which of the following would be most helpful as a next step *(check at least one)*?

- [ ] Check with me in about 1 week please
- [ ] Feedback on my first drill down
- [ ] Feedback on my first data summary
- [ ] Help with my first drill down
- [ ] Help with my first data summary
- [ ] Other idea: ______________________________

______________________________
Every month the PBIS team analyzes our referral data and selects one or two problems to address. We look for patterns in context, behavior, and perceived motivation to prioritize and build solutions. Thank you so much for your consistency in following the behavior protocols and submitting referrals. Your data help everyone to be more efficient and effective!

Summary (Where, What, When)

Averages: Our Avg Referrals for September was 5.5 which is near the 75th percentile nationally

Locations: Classroom (36%), Common (15%), Playground (14%), Hallway (14%), Café (12%)

Behaviors: Language (22%), Defiance (21%), Harassment (19%)

Date/Time: Small increase on Fridays, peaks from 9am-9:30am and 1pm-2pm
**Summary (Who)**

**Grade:** 3rd (20%), 7th (20%), 8th (17%), 5th (17%)

**Students 2-5 Referrals:** 20 students since school started

**Students 6+ Referrals:** 6 students since school started
**Update on Old/Previously Identified Problem: Grades 6-8 Defiance**

Precise Statement: In September we identified that 12 students in grades 6-8 were referred (16 referrals) for defiance between August 22nd and September 18th (4 weeks = 4/week). Referrals were primarily in the classroom but also in common areas. There were not clear patterns by time of day and the behavior in this context seems to be maintained by avoiding tasks.

Update: In the last 4 weeks there have been 9 referrals (almost 50% reduction) in this context across 5 students (more than 50% reduction). Note of interest, the perceived motivation for the latest referrals show both task avoidance and obtaining peer attention.

Recommendation: Identify individual students and work directly with grade level teams or individual teachers.

**Potential New Problem: Hallway Tardiness across 6th Grade Latino Students**

Since the beginning of the school year there have been 31 referrals submitted by 22 staff members for tardiness (mostly major) in the hallway, especially during lunch period (12:30pm – 1:30pm). All referrals were for Latino students (18 male and 13 female) in the 6th grade. Latino students are one of our subgroups vulnerable to disproportionality. The perceived motivation was almost exclusively reported as “Obtain peer attention”.

Notes/Recommendation: *I expanded the date range from our typical 4 weeks once I noticed that this might be related to ethnicity/race. Given that this was a large group of staff and students I recommend including the district sub-committee on ethnic/racial disproportionality. They may have suggestions for solution development.*

Additional Graphs of interest from SWIS Drill Down
Because I want to use data-based decision making as your facilitator, please complete the evaluation below. If there is feedback that would be helpful beyond my role I may share your responses with my colleagues or staff at PBIS Applications. Please be respectful and constructive in your feedback as this will be more useful. If you would like to schedule a separate meeting to provide more detail please let me know.

For each statement below please identify (X or ●) to indicate

1. Swift at SWIS materials and activities were useful in preparing myself and my colleagues for our SWIS user roles.

   Not at all useful
   Moderately useful
   Extremely Useful

   Comments:

2. The Swift at SWIS training was delivered competently and with respect for learners.

   Not at all useful
   Moderately useful
   Extremely Useful

   Comments:

3. SWIS will be useful for identifying student problem behavior patterns and improving the social climate at my school.

   Disagree
   Neutral
   Definitely!

   Comments:
4. The training environment (room, technology, participants) were conducive to focusing my attention on the features of SWIS. I would recommend a similar arrangement for your next Swift at SWIS training.

Try to avoid this  Fine (could be better or worse)  Keep doing it this way!

Comments:

5. I am comfortable contacting my facilitator for additional supports and understand that my facilitator will continue to support my school and keep in touch with me for as long as my school is using SWIS.

Uncomfortable  That’s fine  Great!

Comments:

(Optional) Name: ________________________________

☐ It’s okay to share my name and contact information if that would be helpful

☐ I would prefer that you do not share my name or contact information when sharing my responses

☐ Please check with me first before sharing my name or contact information when sharing my responses