SWIS

User's Manual

September 2019

PBISApps

How to Find Help

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

My SWIS Facilitator Information

Facilitator Name: _____

Phone Number: _____

Email Address: _____

For More Information

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

support.pbisapps.org

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

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Overview

Who Should Use This Manual?

The purpose of the SWIS User's Manual is to provide SWIS users a quick reference and trouble-shooting guide. The manual is for use by SWIS facilitators and 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 SWIS may be inaccessible based on your access level. Please contact your facilitator to have your access modified. For more information about access levels, see the support article on PBIS-Apps.com by searching for "access levels".

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

What is SWIS?

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

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

Video Tutorials

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

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

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

Log In/Log Out

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

Once at PBISApps:

1. Click on PBIS Applications Login located in the black bar (app bar) at the top of the screen.

2. Enter the email address and password 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 SWIS.

To log out of PBISApps and a SWIS account:

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

2. Click Logout.

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

School Select Menu

Users with access to more than one 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

Enter a Referral
From the SWIS Dashboard

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

2. Enter all required fields.

3. Click Save as Complete.

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

Enter a Student or Staff

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

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 Save and New to save and open a new form to continue adding new person records.

View Reports

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

Dashboard

School Summary

The SWIS Dashboard displays a School Summary Report with the following graphs displayed:

- Average Referrals per Day per Month

- Referrals By Time

- Referrals By Location

- Referrals By Day Of Week

- Referrals By Problem Behavior

- Referrals By Grade

- Referrals By Student

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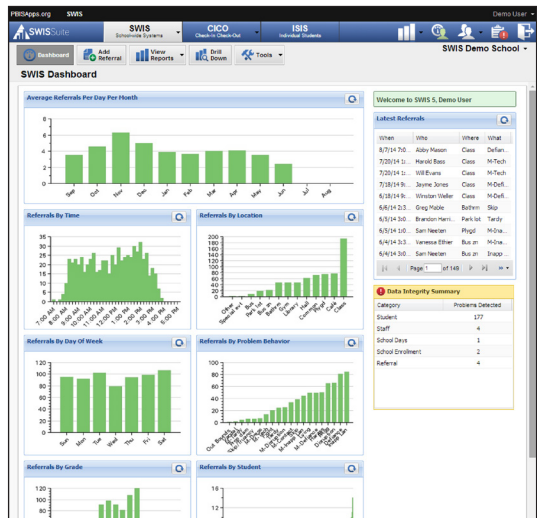
The SWIS Dashboard.

Announcements

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

Referrals Requiring Review

This announcement appears for schools using referral workflows in SWIS and there are referrals requiring review. Click anywhere in the announcement to open Referral Management. For more information about Referral Workflows, see page 17.

Invoice Status

When the account's invoice is due and unpaid, an alert displays with the invoice status and a link to the Invoice Details page. For more information on paying invoices, see Tools - Invoice Details on page 49.

Missing Days and Enrollment Information

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

Latest Referrals

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

Data Integrity Summary

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

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

Categories to appear in the summary include:

- Students

- Staff

- Non-Staff

- School Days

- School Enrollment

- Referral

- CICO

- ISIS

Add Referral

From the SWIS Dashboard

1. Click Add Referral.

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

3. Click Save as Complete to save the referral, or Save as Draft to come back to it later.

Note: SWIS will not save a referral until all required fields are completed. Fewer required fields are needed to save a referral as a draft. See page 18 for more information about adding referrals with referral workflows enabled and page 20 for instructions on how to handle draft referrals in Referral Management.

Required Fields

- **Referral Type:** Select major or minor.

- **Student:** Type or select the student name from the drop-down menu.

- **Grade:** Type or select the student's grade level.

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

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

The Add Referral workspace.

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

- **Location:** Select where the referral occurred.

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

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

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

- **Action Taken:** Select the primary Action Taken.

- **Seclusion/Restraint:** Select whether the referral included the use of seclusion and/or restraint.

HERE'S A TIP

The star icon identifies the primary problem behavior and primary action taken. To remove any problem behavior or action taken, click the red X next to the data to delete. See School Settings on page 29 for additional information you can collect with each referral.

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

HERE'S A TIP

When SWIS identifies a referral as a possible duplicate, a window pops up on the screen prompting to go back and edit the referral you just entered or continue saving the possible duplicate. If you choose to save the possible duplicate without editing it, the record will appear in the Data Integrity Summary as a potential error.

Copy Referral Information to Next Referral

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

- Referral Type
- Time
- Problem Behavior

- Staff
- Location
- Others Involved

- Date

To copy information from one referral to the next:

1. Complete the referral entry for the first student.

2. Click to check the And Copy checkbox.

3. Click Save as Complete.

4. Enter the missing information into the second student's referral.

5. Click Save as Complete.

Custom Fields

A school or facility may identify additional information about a referral necessary for local decision making, district/state reporting, or other purposes. SWIS allows up to ten custom fields to be added. Custom Fields can be enabled, disabled, or modified to fit local needs. Management for Custom Fields is located in School Settings.

Harassment Type and Weapon Type

When Track Harassment Types and Track Weapon Types settings are enabled, SWIS provides the subcategories to identify the type of harassment or type of weapon associated with the referral. Harassment Type and Weapon Type labels can be enabled, disabled, or modified in School Settings.

Find and View, Edit, or Delete Referral

To find a specific referral, or group of referrals to view, edit, print, or delete:

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

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

    a. **To view the referral data:** Click a referral to select it. A summary report of the referral displays to the right.

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

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

The Find Referral workspace.

Using Referral Workflows

Schools or facilities with the Referral Workflow setting enabled have several additional features available from setting up users with Referral Entry Only access, to submitting draft referrals for review, to finally approving referrals as complete.

See Referral Workflows on page 39 for step-by-step instructions to enable this feature in your account.

Referral Entry Only Users

A school/facility interested in setting up staff with access to enter referrals can set up users with Referral Entry Only access. With this access level, users can log in to the SWIS account and enter referrals, but cannot view any reports in the application.

Invite Referral Entry Only Users

To set up Referral Entry Only users, SWIS sends an invitation to each selected staff member. The invitation asks users to complete their setup, including confirming their email address and selecting a password. To send invitations to staff:

1. Click Tools, then click User Management.

2. Click the Invite Referral Entry Only Users button in the upper-left corner of the window.

3. Locate the person to invite by typing the name in the Search field.

4. Click the Search icon.

5. Check the box next to the name to invite. *Note: To invite multiple people at once, repeat steps 3-5 until all staff to invite are selected.*

6. Click the Send Invitation button.

7. Enter any missing email addresses and click Send Invitation. Click Cancel to return to the invitation screen.

Remove Referral Entry Only Access

If a user's Referral Entry Only access needs to be removed from his/her scope:

1. From the Tools menu, click User Management.

2. Locate the user from the list and click to select their name. Note: When removing multiple users' access, select them all in this step.

3. Click Remove Referral Entry Only Access.

4. Click Remove to confirm the removal. Click Cancel to return to User Management.

Note: You can only manage Referral Entry Only access from inside your SWIS account. Removing this access only removes the user's ability to log in to your building's SWIS account. To manage other access levels to SWIS, CICO-SWIS or I-SWIS, contact your school/facility's facilitator.

Save a Complete, Reviewable, or Draft Referral

Workflows enabled provides three options for saving a referral, rather than the standard two. To add a referral, from the SWIS Dashboard, click Add Referral.

The three referral submission options with workflows enabled are:

- **Save as Complete:** Saves the referral to your account without a review. All required fields must be entered.

- **Send for Review:** Sends the referral to one of your account's reviewers to look over and save as complete. Some fields are required to send a referral to be reviewed, but not all.

- **Save as Draft:** Saves the referral for you to come back to later. This does not submit to the system and you are the only person who can view it.

Save as Complete

To save a referral as complete, enter all required fields and click Save as Complete. *Note: This option is not available for all users and is dependant on how workflows are setup for your facility's account.*

Send for Review

To send a referral to any of the school/facility's designated reviewers, from the Add Referral workspace:

1. Enter the following required fields (at minimum).

   - Referral Type
   - Student Name
   - Grade
   - Staff Name

   - Date
   - Time
   - Location
   - Problem Behavior

2. To send the referral to the school/facility default reviewer, click to check the Send to Default Reviewer box.

3. To send the referral to any of the school/facility reviewers, click to un-check the Send to Default Reviewer box.

4. Click the Send for Review button. *Note: Select the reviewer from the drop-down list if not sending the referral to the default reviewer.*

Save as Draft

To save a referral to come back to later, save it as a draft. From the Add Referral workspace:

1. Enter the following required fields (at minimum).

    - Referral Type
    - Date

    - Time
    - Location

2. Click the Save as Draft button.

Copy Referral Information to Next Referral

Use the And Copy checkbox when more than one student is involved in the same incident. The following referral information will be copied over to the next referral as long as it was included on the referral to copy:

- Referral Type
- Staff
- Date
- Time

- Location
- Problem Behavior
- Others Involved

To copy information from one referral to the next:

1. Complete the referral data entry for the first student.

2. Click to check the And Copy checkbox.

3. Click one of the three submission options: Save as Complete, Send for Review, Save as Draft.

4. Enter the missing information into the second student's referral.

5. Click one of the three submission options.

Review, Edit, or Delete Referral in Referral Management

Draft referrals and referrals under review are listed in the Referral Management section. Users access their own draft referrals from this screen. Users designated as Reviewers complete referrals under review from this screen. To view draft referrals or referrals under review, from the SWIS dashboard:

1. Click Tools.

2. Click Referral Management.

- **To view the referral:** Click a referral to select it. A summary of the referral displays to the right with missing data highlighted in red.

- **To edit the referral:** Double click a referral. Revise referral information as necessary. Click one of the three submission options.

- **To delete the referral:** Click a referral to select it. Click the Detele button located in the upper right-hand corner of the window. Click Delete to confirm.

HERE'S A TIP

All of the columns in Referral Management are sortable. Click the black down arrow and choose to sort alphabetically ascending or descending. A quick way to find referrals assigned to you is to sort by the Reviewer column to group your referrals together.

Save Referral as Complete

If a referral in Referral Management contains all required information, it can be saved as complete without selecting to open and edit it. To save a referral as complete from the Referral Management screen:

1. Click to select the referral. *Note: When saving multiple referrals as complete, select them all in this step.*

2. Click Save as Complete.

Note: You can only edit, delete, or 'save as complete' referrals assigned to you.

Assign Referral to Another User

When a referral assigned to one user needs to be assigned to someone else, this happens in the Referral Management screen. To assign a referral to a different reviewer, from the Referral Management screen:

1. Click to select the referral. *Note: When assigning multiple referrals to another reviewer, select them all in this step.*

2. Click Send To.

3. Select another reviewer or the referral's creator from the list.

4. Assigning a referral to another person updates the referral's status in Referral Management to Need More Info.

View Reports

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

Refine a Report

1. Open the desired report.

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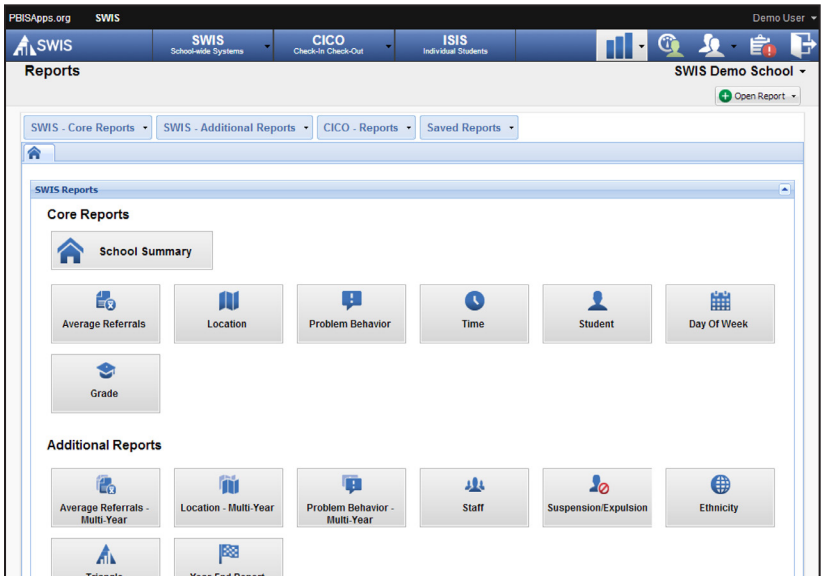
3. Click Generate.

Print a Report

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

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

3. Click Print.

HERE'S A TIP

Open multiple reports in tabs for efficient access to the information you need.

The View Reports dashboard.

Report Types: Core vs Additional

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

Core Reports

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

- **School Summary:** Five Core Reports in one summary - Average Referrals Per Day Per Month, Referrals by Problem Behavior, Location, Time, Day of Week, and Grade.

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

- **Referrals by Time:** When referrals are most likely to occur. Times reported in 15 minute increments.

- **Referrals by Location:** Where referrals are most likely to occur in the school/facility.

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

- **Referrals by Problem Behavior:** Which behaviors occur most frequently in the school/facility.

- **Referrals by Grade:** Which grade levels contribute most often to referrals in the school/facility.

- **Referrals by Student:** Which students are referred most frequently in the school/facility. The option to show student names is available.

Additional Reports

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

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

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

- **Suspension/Expulsion:** The number of suspension/expulsion events, the number of days suspended/expelled, and the students contributing to the referrals. The option to show individual student information is available.

- **School Ethnicity:** Four reports used to discuss areas of disproportionality in the school/facility. Graphs included in the School Ethnicity Report are: Referral Risk Index, Referral Risk Ratio, Students with Referrals by Ethnicity, Referrals by Ethnicty.

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

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

Drill Down

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

To use the Drill Down report:

1. Click on Drill Down in the SWIS navigation bar.
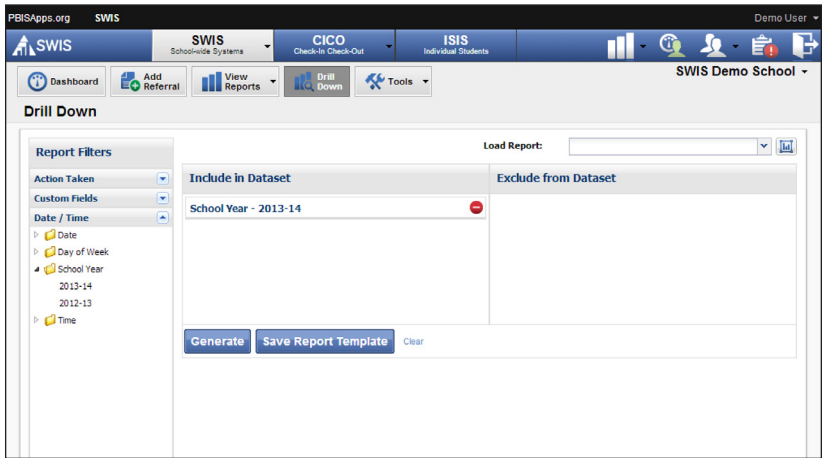
The Drill Down workspace.

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

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

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

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

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

4. Click Generate.

Drill Down Options

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

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

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

4. **Save report template:** Click Save Report Temple to save the specific data filters. Choose to share the template with another SWIS user in the

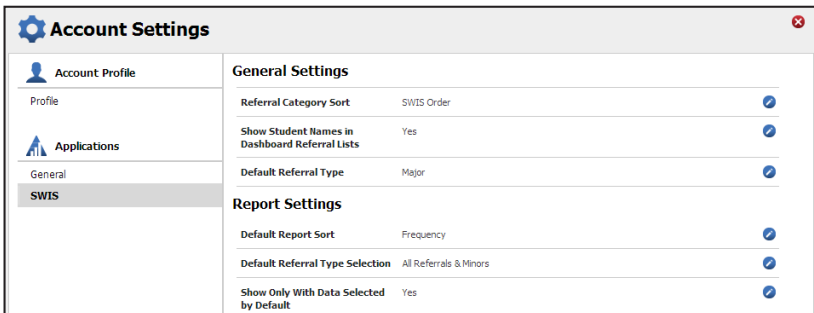school/facility by checking the Share Template Within School option.

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

Print a Drill Down Report

1. Click the Print icon located beside the report's graph.

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

3. Click Print.

Tools – Account Settings

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

The Account Settings > Applications > SWIS settings.

To access Account Settings:

1. Click Tools.

2. Click Account Settings.

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.

To modify Account Profile Settings, in Account Settings:

1. Click on Profile under Account Profile.

2. Click the name of the section to edit.

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

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

5. Click Save.

Applications - General

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

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

To modify General settings, in Account Settings:

1. Click on General under Applications.

2. Select the setting to modify.

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

4. Click Save.

Applications - SWIS

To modify SWIS Application settings, in Account Settings:

1. Click SWIS under the Applications menu.

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

3. Click Save.

Referral Category Sort
Default: SWIS Order

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

Show Student Names in Dashboard Referral Lists
Default: Enabled

When enabled, the Latest Referrals section of the SWIS Dashboard displays student names. Disabling the setting will hide student names from this section of the dashboard.

Default Referral Type
Default: Major

When entering referrals, the Referral Type drop-down menu defaults to Major or Minor based on the preference selected.

Default Report Sort
Default: Frequency

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

Default Referral Type Selection for Reports
Default: All Referrals & Majors

When graphs first display, they will display with Minors only, Majors only, or All Referrals & Minors based on the preference selected.

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

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

Tools – School Settings

To access School Settings:

1. From the SWIS Dashboard click Tools.

2. Click School Settings.

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

School Profile
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 School Name and District Name:

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

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

- Admin Contact
- Billing Contact

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).

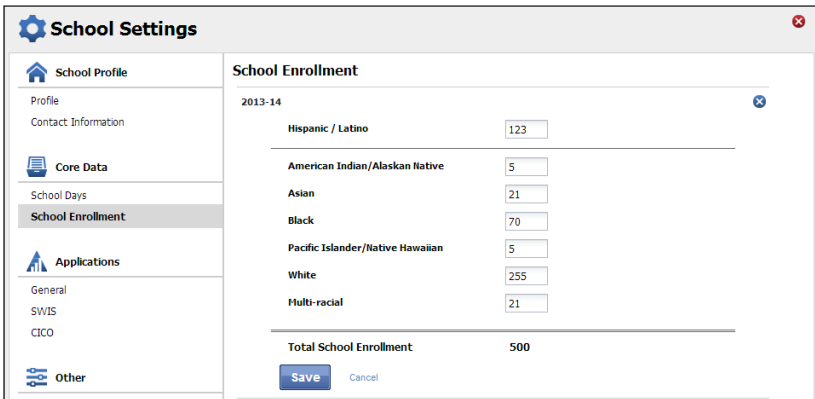4. Click Save.

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. **If the school/facility collects race/ethnicity information:** Enter the number of students within each ethnic group. Total School Enrollment calculates automatically based on the race/ethnicity enrollment entered.

4. **If the school/facility does not collect race/ethnicity information:** Enter the total enrollment.

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 school-wide reports such as the Average Referral Per Day Per Month or Ethnicity Reports, SWIS requires details about School Days and School Enrollment.

The School Settings > Core Data > School Enrollment settings.

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.

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

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 31.

Risk Ratio Comparison Group

Default: All Other Groups

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

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
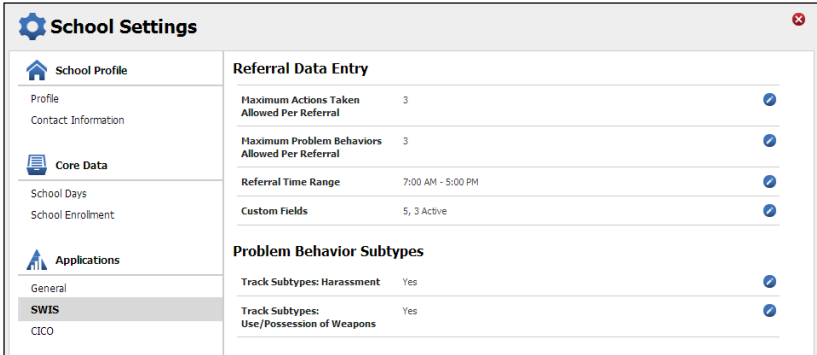Default: Disabled

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.

The School Settings > Applications > SWIS settings.

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

SWIS allows the school/facility to utilize district/internal identification numbers for staff and/or students 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.

Applications - SWIS
Maximum Actions Taken Allowed Per Referral
Default: One

A maximum of five actions taken per referral is possible.

To modify the Maximum Actions Taken Per Referral, in School Settings:

1. Click SWIS under Applications.

2. Click Maximum Actions Taken Allowed Per Referral.

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

4. Click Save.

Maximum Problem Behaviors Allowed Per Referral
Default: One

A maximum of five problem behaviors per referral is possible.

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

1. Click SWIS under Applications.

2. Click Maximum Problem Behaviors Allowed Per Referral.

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

4. Click Save.

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

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

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

HERE'S A TIP

Some examples of Custom Fields categories and labels:

Category: Parent Contact   **Category:** Hallway

Labels: Email, Mail, Phone, In   **Labels:** East Wing. West Wing,

Person, and Unable to Contact   North Wing, and South Wing

To add or modify Custom Fields, in School Settings:

1. Click SWIS the Applications.

2. Click Custom Fields.

To add a new custom field:

1. Click Add

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

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

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

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

6. Click Add.

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

8. Click Save.

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

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

To modify an existing custom field:

1. Double-click the custom field to modify.

2. Modify any of the information displayed.

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

To merge two labels:

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

2. Select the item to keep.

3. Click Merge.

4. Select the item to remove.

5. Click Merge.

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

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

To delete a custom field:

1. Click to select the field to delete.

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

3. Click Yes to confirm the deletion.

To hide a specific Custom Field rather than delete it:

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

2. Click Edit.

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

4. Click Save.

Track Harassment Types
Default: Disabled

Schools/Facilities may choose to track specific harassment types for fine-grained identification. With Track Harassment Types enabled, SWIS provides a list of federally recognized harassment types from which to select when Harassment is chosen as a problem behavior during data entry. These types can be edited per school/facility.

To edit Track Harassment Types, in School Settings:

1. Click SWIS under Applications.

2. Click Track Harassment Types.

3. Choose Yes to enable the setting or No to disable the setting.

4. **To edit an existing type:** click to select the label from the list and edit the information in the Edit Harassment Type box.

5. **To add a new type:** click the Add button and enter the new label's information in the Add Harassment Type box.

6. **To delete an existing type:** click to select the label from the list and click the Delete button.

7. Click Save

Track Weapon Types
Default: Disabled

Schools/Facilities may choose to track specific weapon types to allow for fine-grained identification. With Track Weapon Types enabled, SWIS provides a list of the most common weapon types from which to select when Use/Possession of Weapons is chosen as a problem behavior during data entry. These types can be edited per school/facility.

To edit Track Weapon Types, in School Settings:

1. Click SWIS under the Applications menu.

2. Click Track Weapon Types.

3. Choose Yes to enable the setting or No to disable the setting.

4. **To edit an existing type:** click to select the label from the list and edit the information in the Edit Weapon Type box.

5. **To add a new type:** click the Add button and enter the new label's information in the Add Weapon Type box.

6. **To delete an existing type:** click to select the label from the list and click the Delete button.

7. Click Save

District SDEX Access
Default: Disabled

To authorize use of the SDEX application to download data from the SWIS account, SDEX requires an access code. Enable this setting to provide SDEX access to SWIS data. Provide the code to the SDEX user requesting access to the account.

Referral Workflow
Default: Disabled

This feature allows schools/facilities to take advantage of the SWIS paperless referral entry workflow system. Enabling this feature gives users the option to set two additional settings: Allow Minors Without Review and Referral Reviewers. To enable Referral Workflows, in School Settings:

1. Click SWIS under the Applications menu.

2. Click Referral Workflow Enabled.

3. Select Yes from the drop-down menu.

4. Click Save.

Allow Minors Without Review

Default: Disabled

This setting is only available to schools/facilities with referral workflows enabled. Users submit referrals for approval as part of the workflow. Enabling this feature requires reviewers to approve major office discipline referrals only; minors may be saved without review. Disabling this feature requires reviewers to approve all referrals - major and minor. To enable this setting, in School Settings:

1. Click SWIS under the Applications menu.

2. Click Allow Minors Without Review.

3. Select Yes from the drop-down menu.

4. Click Save.

Referral Reviewers

This setting is only available to schools/facilities with referral workflows enabled. As part of the referral workflow, submitted referrals require review. A reviewer can be anyone in your building with Data Entry access or higher. To add, edit, or delete reviewers, in School Settings:

1. Click SWIS under the Applications menu.

2. Click Referral Reviewers.

To add a new reviewer:

1. Select the reviewer to add from the User drop-down menu.

2. To make this the default reviewer for the account, check the Default Reviewer checkbox.

3. Click the Save button.

4. Repeat steps 1-3 to continue adding reviewers to the list.

To remove an existing reviewer from the list:

1. Click to select the reviewer's name from the list.

2. Click Remove.

3. Click Remove to remove the reviewer. Click Cancel to return to the list.

HERE'S A TIP

Removing a reviewer from the list doesn't remove their ability to log-in and access the application. It just removes their ability to approve referrals submitted for review. If you want to remove a reviewer's access to your SWIS account, contact your SWIS facilitator.

Other - Data Integrity

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

1. Click on Data Integrity under Other.

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

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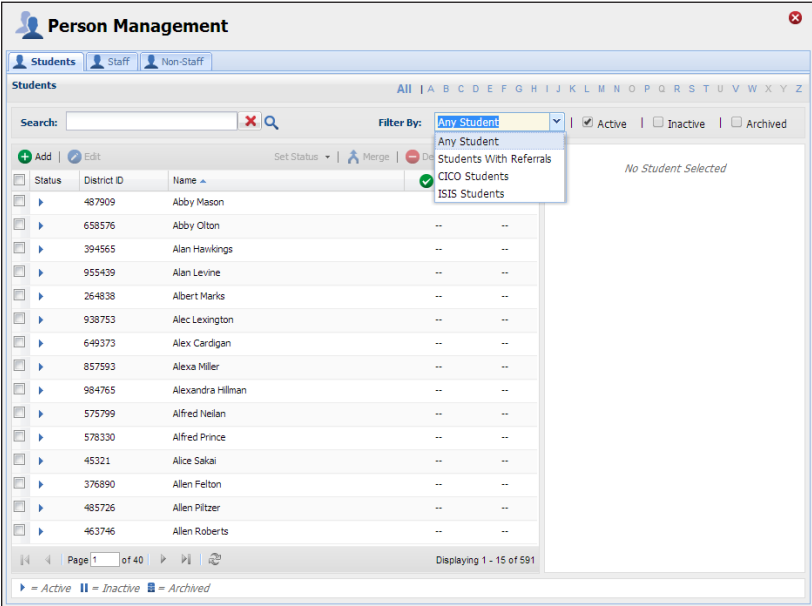
4. Click Save.

Tools – Person Management

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

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.

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

The Person Management workspace.

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

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

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

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

Add a New Record

1. In the Tools menu, click Person Management.

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

3. Click Add.

4. Enter all required information about the person.

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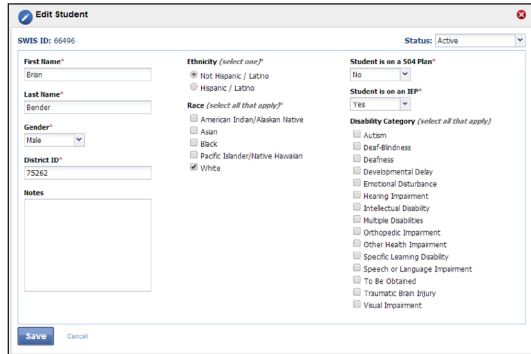
Merge Duplicate Records

Merging two names will move all referrals 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 SWIS account.

2. Locate the name of the person to be retained by typing the name in the Search field.

3. Click the Search icon.

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

5. Click Merge.

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

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

8. Click Merge.

Revise a Record

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

2. Click the Search icon.

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

The Edit Student workspace.

4. Revise the necessary information.

5. Click OK.

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.

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:

The Person Management workspace with Set Status menu.

- **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).

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

4. Click OK.

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Update Multiple Records

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

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

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

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

4. Select the appropriate status for the records.

Tools – Data

Data Integrity

To access the Data Integrity system:

1. From the SWIS Dashboard click Tools.

2. Click Data Integrity.

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

- Any staff, non-staff, or 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)

- Referrals with a **major/minor behavior mismatch**

- **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:

- 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.

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

To use the Person Import feature:

1. From the Tools menu, click Person Import.

2. Correct the data integrity errors identified in the Issues Preventing Import section to the right. Once all data integrity errors are corrected, the sections will appear green with a checkmark.

> **HERE'S A TIP**
> Visit the Data Integration section of PBISApps.org for more information on the pros and cons related to Person Import.

3. Create the student or staff export from your student information system based on the technical specification.

4. Go to https://sandbox.swis.org to import the roster(s) in your sandbox account. The sandbox is for testing purposes. It refreshes every night with data from your real SWIS account and gives you a secure place to test your import process. Use the sandbox account to test any new file prior to importing data into your real SWIS account.

5. Follow the Person Import Wizard to upload the file to your sandbox account.

6. Once your test file uploads successfully, log back into your live SWIS account and navigate back to the Person Import section. It may take as long as 15 minutes for the live site to register your successful sandbox upload.

7. Click the Enable Person Import button in the notification located at the top right corner of the Person Import screen.

8. Follow the Person Import Wizard to upload the tested roster to your live account.

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 year.

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 SWIS, it is recommended to refer to the PBISApps Support page for the answers. Access the Support page by clicking Support under the Tools menu. The page will open in a new tab. Search the page for answers to your frequently asked questions.

Tools – Invoice Details

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

- User name

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

- Last time logging in to PBISApps

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

Appendix A - SWIS Data Entry and Reporting Schedule

School: _____ Facilitator: _____

Data Entry

Who	What	When
	Office Referrals	
	Accuracy Checks	

Report Generated

Who	What	When