



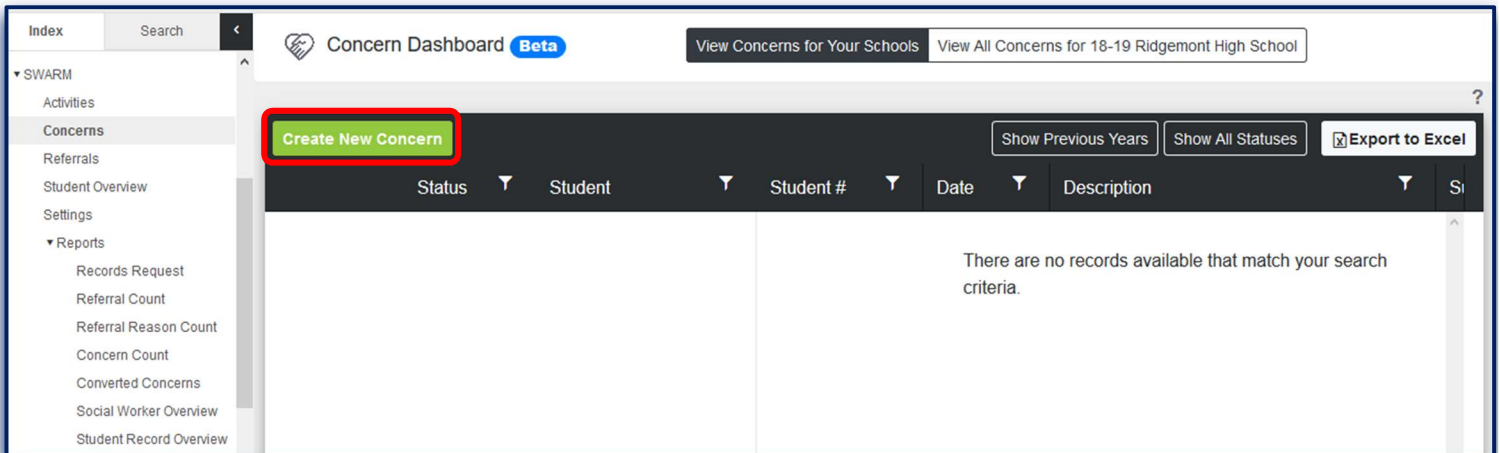
SWARM User Guide

(Social Worker Activity and Referral Module)

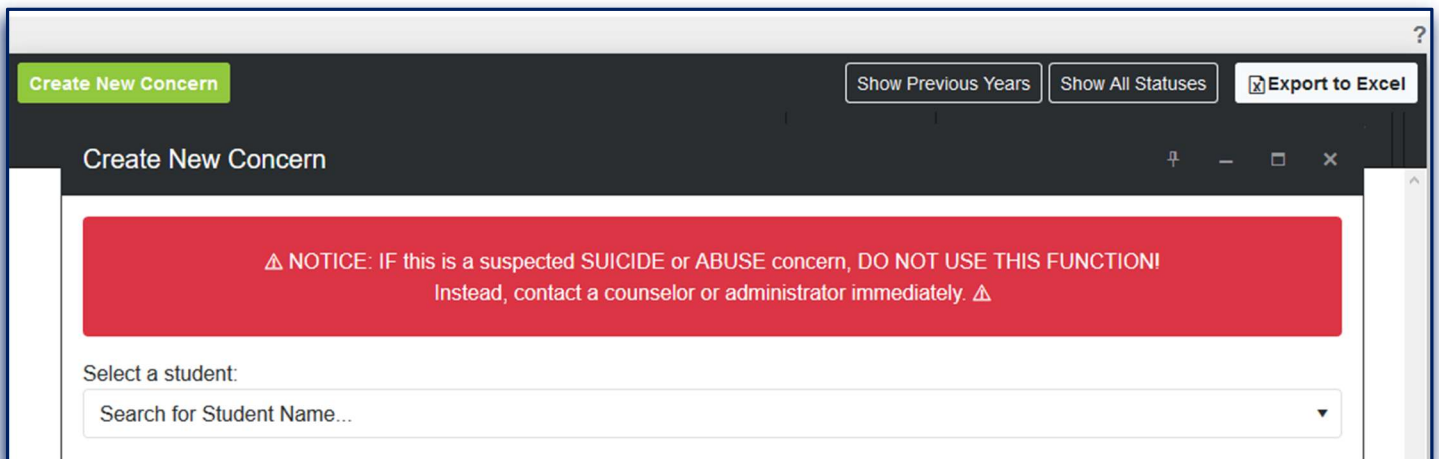
This user guide provides step by step directions on creating concerns and referrals within SWARM. Some users' functionality may differ according to tool rights assigned to their Infinite Campus accounts.

Creating a Concern

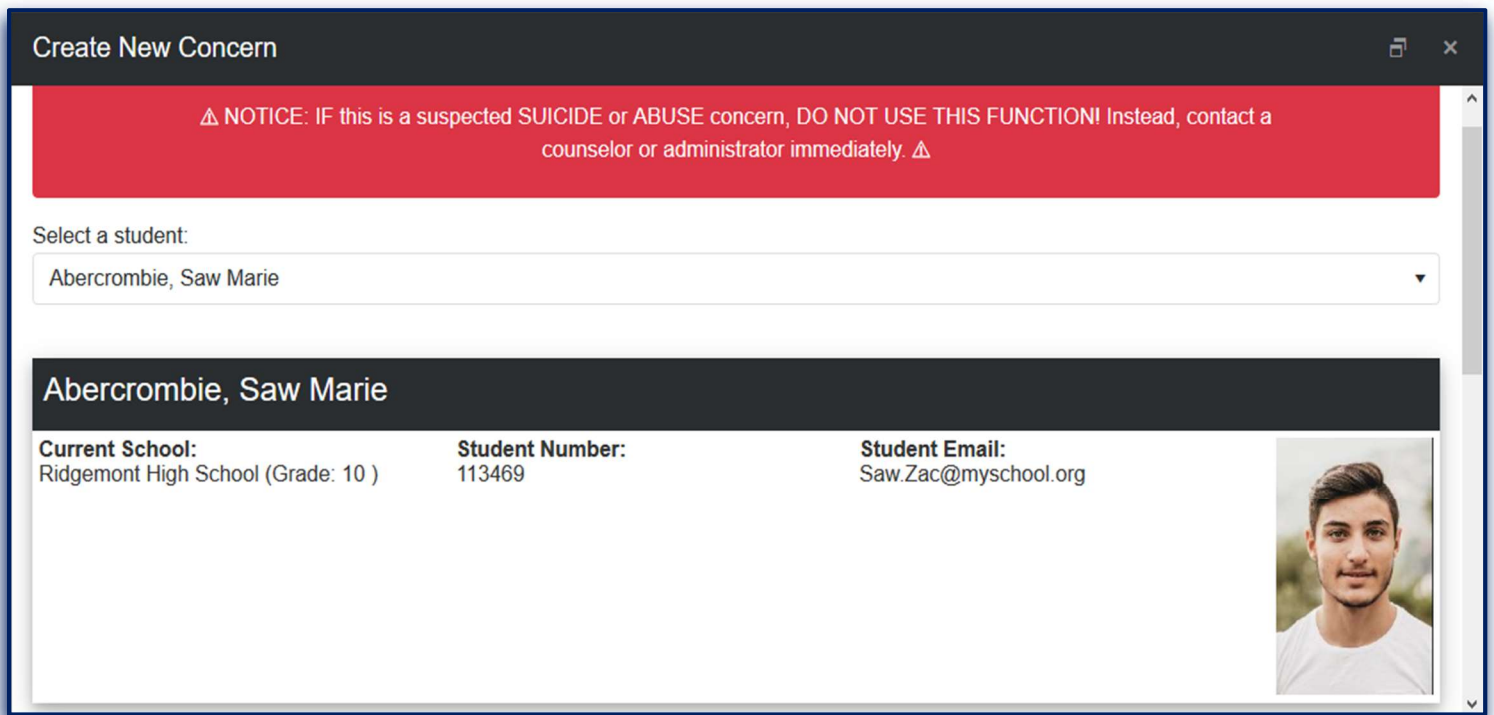
Navigate to the SWARM module within Infinite Campus. Click the "Concerns" outline link, followed by the "Create New Concern" button at the top left of the Concern Dashboard.



From the window that displays, search for the student for whom you would like to create a concern.

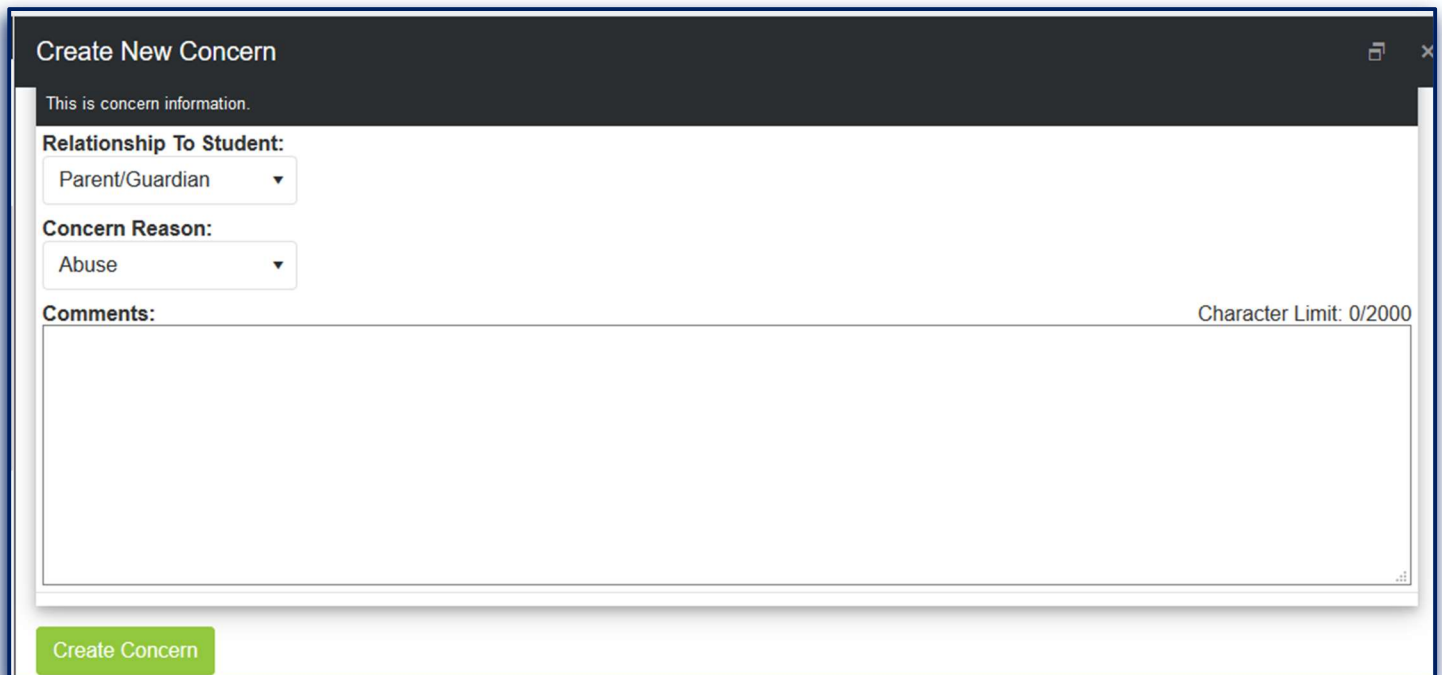


The top section of the resulting screen will display demographic information about the selected student...



The screenshot shows a web browser window titled "Create New Concern". At the top, there is a red banner with a warning: "NOTICE: IF this is a suspected SUICIDE or ABUSE concern, DO NOT USE THIS FUNCTION! Instead, contact a counselor or administrator immediately." Below the banner, there is a dropdown menu labeled "Select a student:" with "Abercrombie, Saw Marie" selected. Underneath, a dark header displays the student's name "Abercrombie, Saw Marie". Below this header, three columns of information are shown: "Current School: Ridgemont High School (Grade: 10)", "Student Number: 113469", and "Student Email: Saw.Zac@myschool.org". To the right of the email is a small profile picture of a young man with short brown hair and a mustache, wearing a white t-shirt.

...while the lower part of the screen provides fields allowing the user to describe the nature of the concern.



The screenshot shows the lower portion of the "Create New Concern" form. It starts with a dark header containing the text "This is concern information." Below this, there are two dropdown menus: "Relationship To Student:" with "Parent/Guardian" selected, and "Concern Reason:" with "Abuse" selected. Below these is a large text area labeled "Comments:" with a "Character Limit: 0/2000" indicator in the top right corner. At the bottom left of the form is a green button labeled "Create Concern".

Please note that – according to the settings preferences determined by the district’s SWARM administrator – some districts will select from a Concern Reason droplist, some will fill in a Comments box, and some will have both options.

Once information about the concern has been added, click “Create Concern”.

Create New Concern

This is concern information.

Relationship To Student:
Counselor

Concern Reason:
Attendance

Comments: Character Limit: 39/2000
Saw has been absent 16 times this term.

Create Concern

The user will now be returned to the Concern Dashboard. The just-created concern will display as “new”.

Concern Dashboard **Beta**

View Concerns for Your Schools | View All Concerns for 18-19 Ridgemoor High School

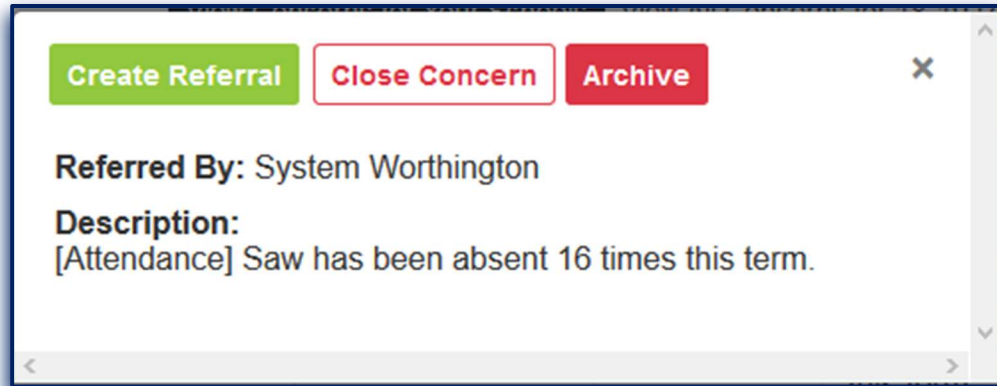
Create New Concern | Show Previous Years | Show All Statuses | Export to Excel

Status	Student	Student #	Date	Description	Si
NEW	Saw Abercrombie	113469	03/17/2019	[Attendance] Saw has been absent 16 times this term.	S

Details

The concern dashboard will display a list of any concerns submitted by the user who is currently logged in to Infinite Campus.

If a user with appropriate tool rights clicks the “details” button to the left of a concern, s/he will receive the following options:



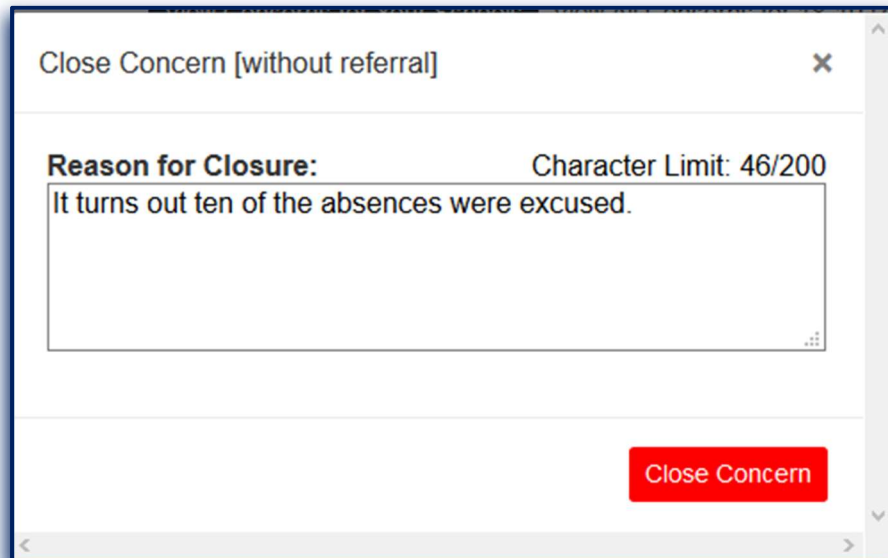
The “Create Referral” button is used for concerns that have been determined eligible for escalation to referral status.

The “Close Concern” button may be used when it has been determined unnecessary to further the concern into a referral.

The “Archive” button is only appropriate for concerns that may have been created by mistake.

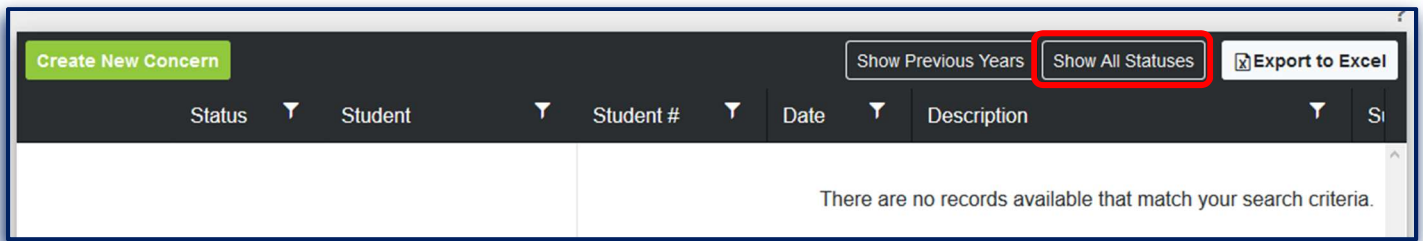
Once a concern has been archived, it will no longer display on the dashboard but will remain in the database.

Should the user decide to close the concern, clicking the “Close Concern” button will display the following dialog box:



The user keys in the reason for closure, clicks “Close Concern”, and the concern is removed from the user’s dashboard.

If the user would like to review the status of any concern s/he created this school year, clicking the “Show All Statuses” button at the top of the concern dashboard will return a list of all concerns, whether referred or closed.



The resulting list can be filtered by any of the headers at the top of each column.

The screenshot shows a table of concerns with the following data:

Status	Student	Student #	Date	Description	Si
Details CLOSED	Saw Abercrombie	113469	03/17/2019	[Attendance] Saw has been absent 16 times this term.	S
Details REFERRED	Saw Abercrombie	113469	03/14/2019	[Academic] This is a concern	S
Details CLOSED	Saw Abercrombie	113469	03/12/2019	[Abuse] This is a concern.	S
Details REFERRED	Saw Abercrombie	113469	03/11/2019	[Academic] test	S
Details CLOSED	Joey Barnett	109046	03/07/2019	[Abuse] test	S

Clicking the name of any student takes the user to the Student Overview page for that student (also available in outline links), which recaps all historical concerns, referrals, and activities for that student.

The screenshot shows a student overview page for a student with phone number (867)530-9282, home language Karen, Karenni, and gender M. The page is divided into three sections:

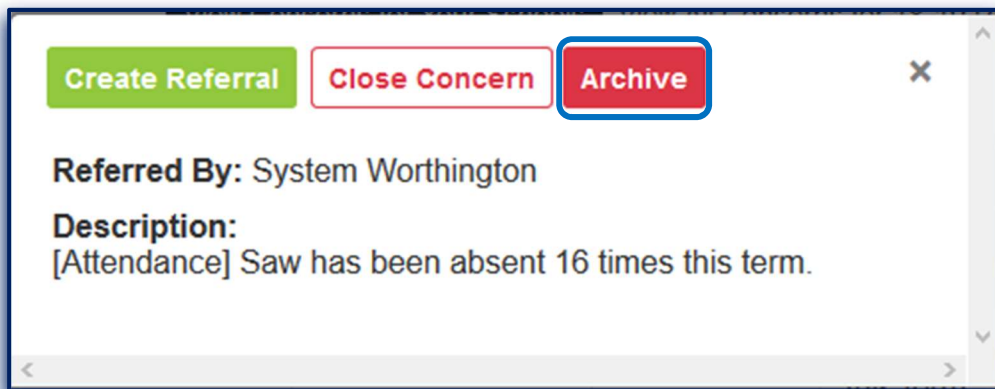
- Referrals (9):** A table with columns: Date, Primary Reason, Social Worker, Created By, and DETAILS.

Date	Primary Reason	Social Worker	Created By	DETAILS
03-14-2019	Academic	System Worthington	System Worthington	DETAILS
03-12-2019	Attendance	System Worthington	System Worthington	DETAILS
03-11-2019	Academic	System Worthington	System Worthington	DETAILS
03-06-2019	Attendance	System Worthington	System Worthington	DETAILS
- Concerns (9):** A table with columns: Date, Concern Reason, Created By, and Status.

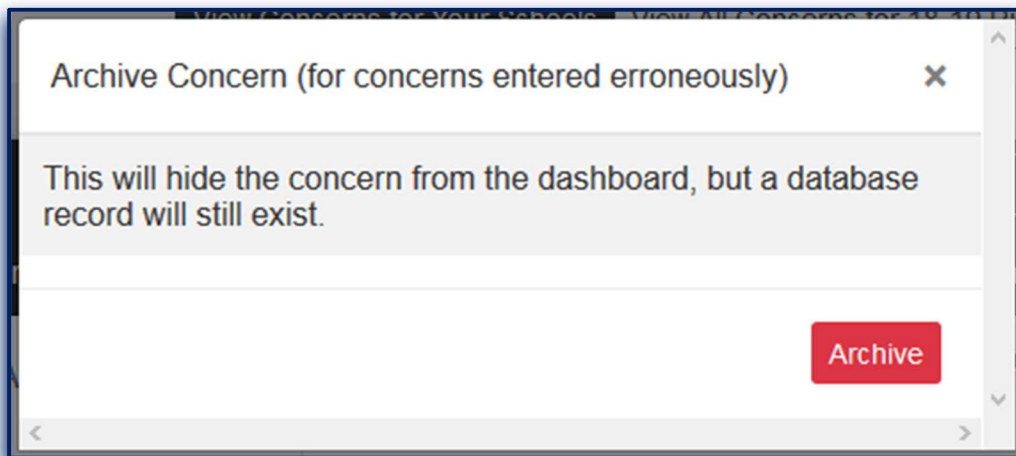
Date	Concern Reason	Created By	Status
03-17-2019	Saw has been absent 16 times this term.	System Worthington	CLOSED
03-14-2019	This is a concern	System Worthington	REFERRED
03-12-2019	This is a concern.	System	CLOSED
- Activities (5):** A table with columns: Type, Date, Activity Description, and Created By.

Type	Date	Activity Description	Created By
Individual	03-01-2019	test	System Worthington
Group (Dublin City)	02-27-2019	test	System Worthington

The Archive button should only be used in cases where a concern has been created in error:



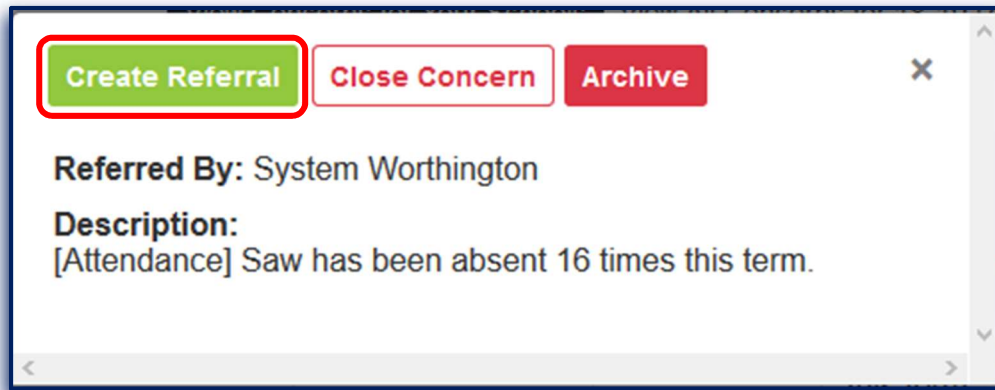
The user will receive the following dialog box:



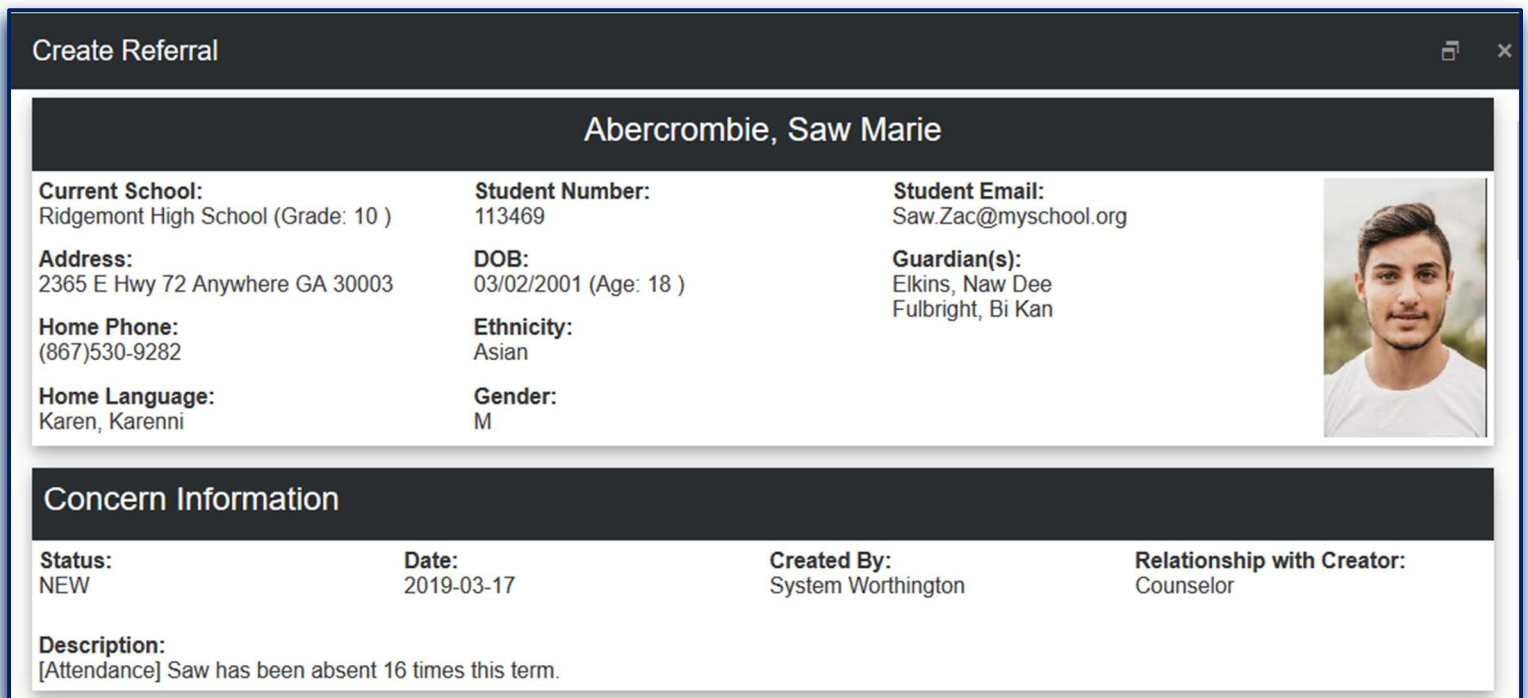
Both archived and closed concerns are available to view by clicking the "Show All Statuses" screen from the Concern Dashboard. Users with appropriate access can reactivate archived and closed concerns.

Creating a Referral

From the concern dashboard, the user may choose to escalate the concern by creating a referral.

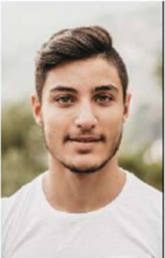


Once the Create Referral button has been clicked, the referral entry screen displays.



Create Referral

Abercrombie, Saw Marie

Current School: Ridgemont High School (Grade: 10)	Student Number: 113469	Student Email: Saw.Zac@myschool.org	
Address: 2365 E Hwy 72 Anywhere GA 30003	DOB: 03/02/2001 (Age: 18)	Guardian(s): Elkins, Naw Dee Fulbright, Bi Kan	
Home Phone: (867)530-9282	Ethnicity: Asian		
Home Language: Karen, Karenni	Gender: M		

Concern Information

Status: NEW	Date: 2019-03-17	Created By: System Worthington	Relationship with Creator: Counselor
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Description:
[Attendance] Saw has been absent 16 times this term.

The first two sections of this screen are for reference. The student's demographics information populates from his or her Infinite Campus account. Following that, concern information as it was originally input can be viewed.

Beneath the Concern Information, the basic details of the referral display. The information there may be changed or added in.

Create Referral

Concern Information

Status: NEW	Date: 2019-03-17	Created By: System Worthington	Relationship with Creator: Counselor
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Description:
[Attendance] Saw has been absent 16 times this term.

Referral Information

This is referral information.

Date of Referral: 3/17/2019	Status: NEW
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Social Worker: System Worthington	Alternate Social Worker: None	Additional Staff: Select other...
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Referred By: System Worthington	Relationship: Counselor
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The Social Worker field populates based on the original concern but may be edited using the droplist of social workers. Users may also select an Alternate Social Worker and Additional Staff if appropriate to the referral. Other fields in this section include a text box for the Referred By staff member and a droplist for the relationship of the person creating the referral to the student.

Following the Referral Information section, the reasons for the referral display. The initiator of the referral may create as many reasons as necessary for the case in this area. The list of reason types are determined by administrators during the initial SWARM setup.

Referral Reasons

This is referral reason. Please select at least one.

Primary Reason: Attendance	5 Day Letter Sent 2/28/2019
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Other Reasons:

Bullying

+ Add Reason

Next is a Homeless status area, which defaults to “no”:

Homeless? Yes No

This is homeless.

When the Homeless status is changed to “yes”, the creator of the referral then selects from a droplist for Dwelling Code and Homeless Reason.

Homeless? Yes No

This is homeless.

Dwelling Code:

Hotel/Motel

Homeless Reason:

Economic Reason

The Actions section allows owners of the referral to add a list of any activities that occur during the life of the referral...

Create Referral

Actions

This is referral actions.

Date	Name	Title	Action Taken
3/4/2019	Sue Hendrickson	Social worker	Met With Student

Add+

Summary

This is referral summary.

Test

...while the Summary area provides a place that the person in charge of the referral may describe the nature of the case. All areas on the referral page may be updated as the case requires.

The final section of the referral lists the names of any other students in the same household. The creator of the referral may check the box next to the name of anyone listed there if a case also needs to be opened on that person's behalf, as well.

Checkbox to make duplicate referral for household member
This is duplicate referral.

	Name	Grade	School	Social Worker	Alt. Social Worker
<input type="checkbox"/>	Bascle, Candy	10	Ridgemont High School		
<input checked="" type="checkbox"/>	Lopez, Hay	07	Interchange Middle School	Samantha Abernathy	None

[Create Referral](#)

Once the referral has been created using the button at the bottom of the screen, the user is taken to the Referral Dashboard...

Referral Dashboard Beta

View Your Referrals

View All Referrals for 18-19 Ridgemont High School

Transfer Portal 3

Create New Referral

Show Closed Referrals

Show Previous Years

Export to Excel

	Status	Student	Student #	Date	Reason	School
Details	NEW	Hay Lopez	113468	03/17/2019	Attendance	Interchange Middle School (07)
Details	NEW	Saw Abercrombie	113469	03/17/2019	Attendance	Ridgemont High School (10)
Details	In Progress	Candy Bascle	113470	03/14/2019	Academic	Ridgemont High School (10)
Details	In Progress	Saw Abercrombie	113469	03/14/2019	Academic	Ridgemont High School (10)

...where the referral that has just been created will display at the top of the list. As with the Concern Dashboard, the Referral Dashboard may be filtered according to the column headers.

Staff with the necessary tool rights may also create referrals without first initiating a concern by using the Referrals section of the SWARM outline links.

SWARM administrators may also be able to view others' cases in the school or district, but most users will have access to their own cases only.

The Transfer Portal button at the top of the Referral Dashboard indicates whether action is needed pertaining to students with open cases who have either transferred within district or withdrawn for another school system.

	Status	Student	Student #	Date	Reason	School
Details	NEW	Hay Lopez	113468	03/17/2019	Attendance	Interchange Middle School (07)
Details	NEW	Saw Abercrombie	113469	03/17/2019	Attendance	Ridgemont High School (10)
Details	In Progress	Candy Bascle	113470	03/14/2019	Academic	Ridgemont High School (10)
Details	In Progress	Saw Abercrombie	113469	03/14/2019	Academic	Ridgemont High School (10)

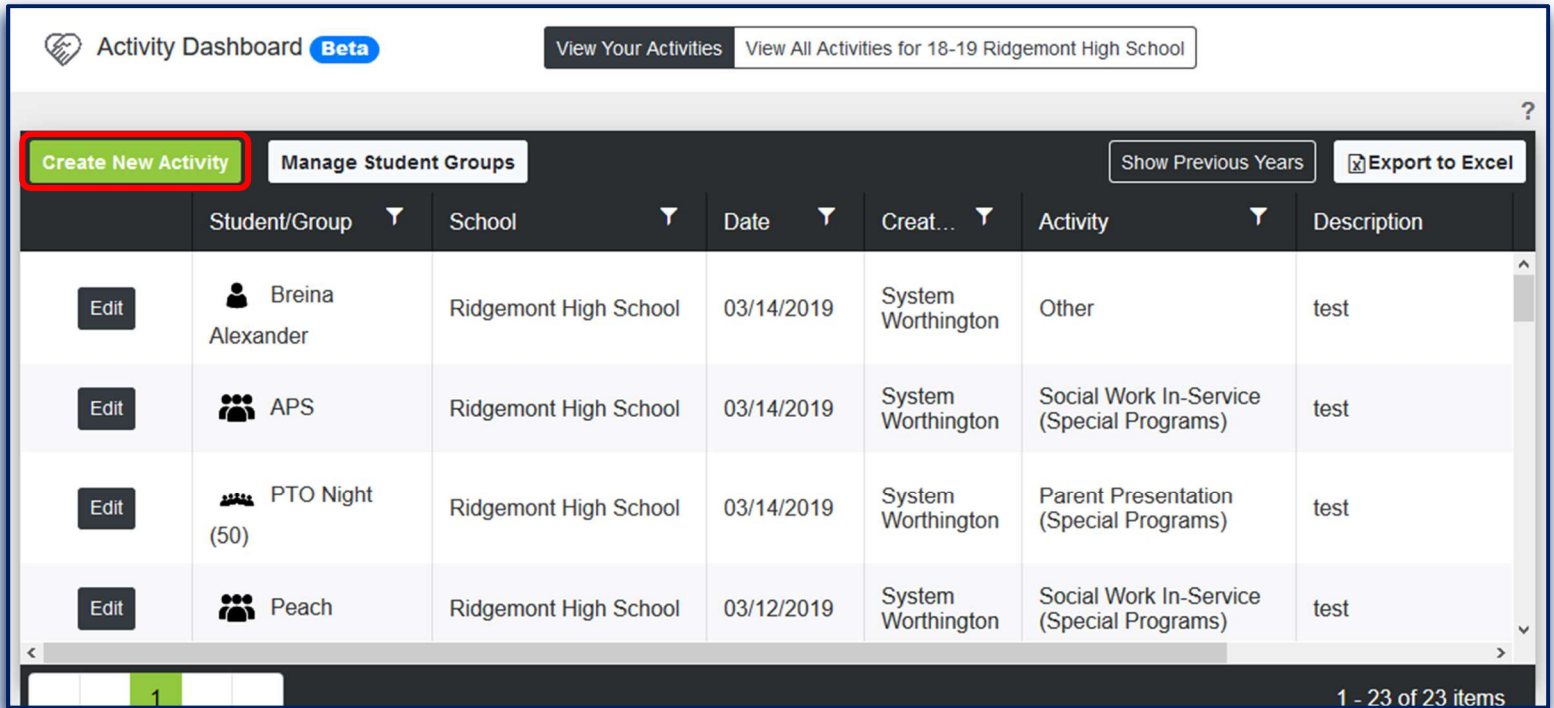
If the Transfer Portal button is clicked, the user will be taken to dashboard for that area...

Student Name	Referral Description	Old School	New School	Action
Taylor Abarca-Ramirez	test	Ridgemont High School (End Date: 2019-03-11)	Transfer Out-of-District	Close Referral
Taylor Abarca-Ramirez	test	Ridgemont High School (End Date: 2019-03-11)	Transfer Out-of-District	Close Referral
Ciara Cole	Ciara hasn't been to school in a week.	Ridgemont High School (End Date: 2019-03-08)	Interchange Middle School	Transfer Referral

...and by clicking the “Close Referral” button for the withdrawn students or the “Transfer Referral” button for the transfers students within the district, may take the appropriate action for each type of case.

Creating an Activity

Activities in SWARM refer to anything a social worker might need to keep track of that doesn't have to do with a referral. The Activities Dashboard can be accessed from the Activity outline link in Infinite Campus.



Activity Dashboard **Beta** View Your Activities View All Activities for 18-19 Ridgemont High School

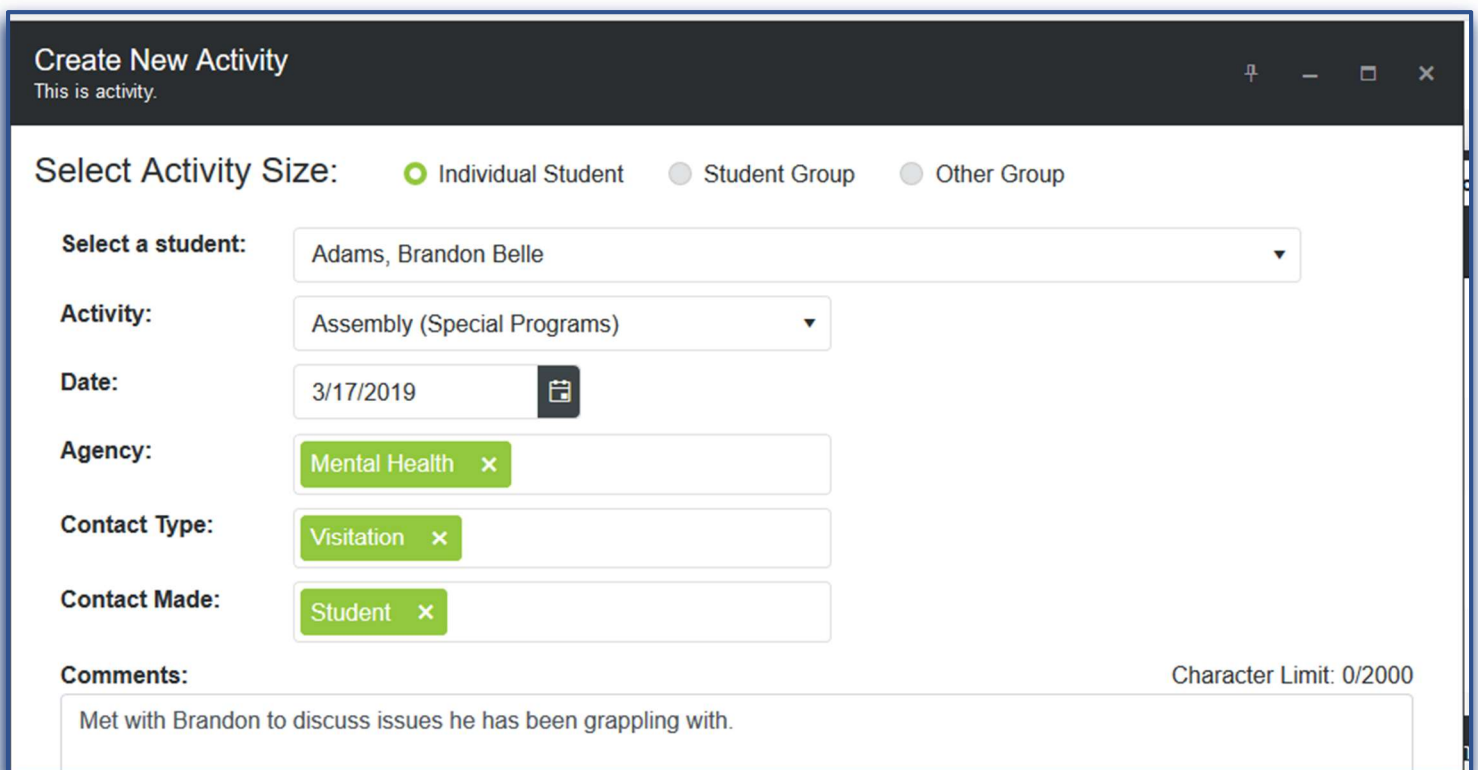
Create New Activity Manage Student Groups Show Previous Years Export to Excel

	Student/Group	School	Date	Creat...	Activity	Description
Edit	Breina Alexander	Ridgemont High School	03/14/2019	System Worthington	Other	test
Edit	APS	Ridgemont High School	03/14/2019	System Worthington	Social Work In-Service (Special Programs)	test
Edit	PTO Night (50)	Ridgemont High School	03/14/2019	System Worthington	Parent Presentation (Special Programs)	test
Edit	Peach	Ridgemont High School	03/12/2019	System Worthington	Social Work In-Service (Special Programs)	test

1 - 23 of 23 items

There are three types of activity in SWARM: individual student, student group, and other group. Each type is created by clicking the Create New Activity button at the top left of the dashboard.

All types allow the user to select an activity, agency, contact type, contact made, and to comment.



Create New Activity This is activity.

Select Activity Size: Individual Student Student Group Other Group

Select a student: Adams, Brandon Belle

Activity: Assembly (Special Programs)

Date: 3/17/2019

Agency: Mental Health

Contact Type: Visitation

Contact Made: Student

Comments: Character Limit: 0/2000

Student groups can be created using the Manage Student Groups button on the Activity Dashboard.

Create New Group ×

Group Name	Group Members	Last Activity	Managed By	
Morning Group (hidden)	Saw Abercrombie Susan Allen Niyah Bonds	02/20/2019	System Worthington	Edit
Test	Taylor Abarca-Ramirez April Arrowsmith William Ash Kaylea Autrey Tatianna Ayala...	N/A	System Worthington	Edit
After School Group	Jesse Annandale Paul Barksdale Jake Bishop Kelsie Bowman Kaylee Cooper	03/11/2019	System Worthington	Edit
Dublin City	Saw Abercrombie Riley Adams Kaylee Allen Samantha Allen Tydasha Appleby... Brandon Adams	02/27/2019	System Worthington	Edit

When a Student Group Activity is created, group members can be manually edited based on which members were in attendance at the specific meeting.

Select Activity Size: Individual Student Student Group Other Group

Select a group:

Group Members Present:

Jesse Annandale Paul Barksdale Jake Bishop Kelsie Bowman
Kaylee Cooper

Activity:

Date:

Agency:

Contact Type:

Contact Made:

Comments: Character Limit: 52/2000

Other Group describes any group a social worker may meet with exclusive of students.

Select Activity Size: Individual Student Student Group Other Group

Group Name:

Activity:

Date:

Agency:

Contact Type:

Contact Made:

Num. Participants:

Comments: Character Limit: 66/2000

As each new activity is created, it will appear at the top of the Activity Dashboard.

Activity Dashboard Beta View Your Activities View All Activities for 18-19 Ridgemont High School

Create New Activity Manage Student Groups Show Previous Years Export to Excel

	Student/Group	School	Date	Creat...	Activity	Description
	Concerned parents (24)	Ridgemont High School	03/17/2019	System Worthington	Parent Presentation (Special Programs)	Met with parents to discuss on-campus student use of social media.
	Breina Alexander	Ridgemont High School	03/14/2019	System Worthington	Other	test
	APS	Ridgemont High School	03/14/2019	System Worthington	Social Work In-Service (Special Programs)	test
	PTO Night	Ridgemont High School	03/14/2019	System	Parent Presentation	test