



SOCIAL, EMOTIONAL,
& BEHAVIOR ACADEMY



Identification, Matching, and Monitoring Process

OBJECTIVE




Our team can review and reflect on the processes and systems that are essential to ensure students are receiving appropriate Tier 2 and 3 supports, specifically those related to identification, matching, and monitoring.

OUTCOME

Our team can identify processes that are already being used for identification, matching, and monitoring, as well as determine where systems are missing and/or can be improved.

Steps to this Tool:

- + [Part 1: Self Reflection](#)
- + [Part 2: Visual Model](#)
- + [Part 3: Guiding Questions](#)

Definitions	
 Identification	<p>The process used to identify which students need specific SEL and mental health supports.</p> <p>Examples: teacher referral; office discipline records, mental health screener, family request, student self-referral, etc.</p>
 Matching	<p>The process used to match students to the specific Tier 2 or 3 support(s) that meet their identified need(s) and/or provide access to students within the appropriate systems of support.</p> <p>Examples: Student Support Team (SST) process, school social worker case review, etc.</p>
 Monitoring	<p>The process used to monitor fidelity of implementation and the students' progress and/or the outcome of the support. This piece of the process is then used to adjust, continue, or terminate specific supports.</p> <p>Examples: classroom observations, clinical notes, post-assessment survey, SST period review, daily progress reports, self-report ratings, etc.</p>

> Part 1: Self Reflection

Use the guiding questions below to reflect on your school/district's processes for identification, matching, and monitoring.



Guiding Questions

- 1. How do we identify students who may need services at Tiers 2 and 3?**
 - Are there clear indicators for when to refer students?
 - Are staff trained in identifying “red flags”?
 - Is there a clear documented referral process and referral form that allows for quick access to interventions and informs intervention match?
- 2. Who is involved in this process (teachers, families, counselors, etc)?**
 - How do teachers identify and refer students?
 - How can parents refer students?
 - How can students self-refer?
 - Is there information or training available to each group on this process?
- 3. What data informs this process?**
 - What data sources are used?
 - Who collects the data? Who looks at the data and at what frequency to identify the need for Tier 2 / 3 supports?
 - Are there criteria or guidelines for entry / access to the intervention?

Team Reflections:

Next Steps to strengthen the Identification Process



Guiding Questions

1. **What is our process for matching a student with specific interventions?**
 - Is there a Student Support Team? Who is on the team? How often do they meet?
 - What data is collected to determine what interventions a student needs?
 - How are specific needs identified and matched to interventions?
 - Is there a list of evidence-based Tier 2 and/or Tier 3 interventions available? If so, does it outline the purpose of the intervention, which function and/or skill area(s) it addresses, and who is responsible for coordinating the intervention?
2. **How is placement in Tier 2 and Tier 3 interventions communicated?**
 - ...to classroom teachers?
 - ...to parents?
 - ...to students?
 - Does each person understand their role in supporting the interventions?

Team Reflections:

Next Steps to strengthen the Matching Process:



Guiding Questions

- 1. What is our process for monitoring how students are responding to supports?**
 - a. Are students' progress discussed at student support team meetings?
 - b. How often?
 - c. What data—quantitative or qualitative is used to determine progress?
- 2. How is it decided whether adjustments need to be made to the supports, or a different support is needed?**
 - a. Is data collected and reviewed on intervention fidelity if students are not making expected progress?
 - b. What is the process to determine if type of intervention and/or intervention dosage needs to be adjusted?
 - c. How is that decided and communicated to the relevant staff?
- 3. How is it determined when a student is no longer in need of those supports?**
 - a. What indicators are used to determine if a student no longer needs Tier 2 and/or Tier 3 supports?
 - b. Who decides?
 - c. How is the decision communicated to others?
 - d. Are there indicators or guidelines in place to systematically fade supports?

Team Reflections:

Next Steps to strengthen the Monitoring Process:

> Part 2: Visual Models

Below are two diagrams showing how schools might conceptualize processes/systems for identification, matching, and monitoring. Consider how your school/district conceptualized its process for identifying, matching, and monitoring students who need additional social, emotional, and/or behavioral supports. You may want to consider creating a similar visual (feel free to use one of these as is or adapted to your school's/district's processes).

Diagram 1.

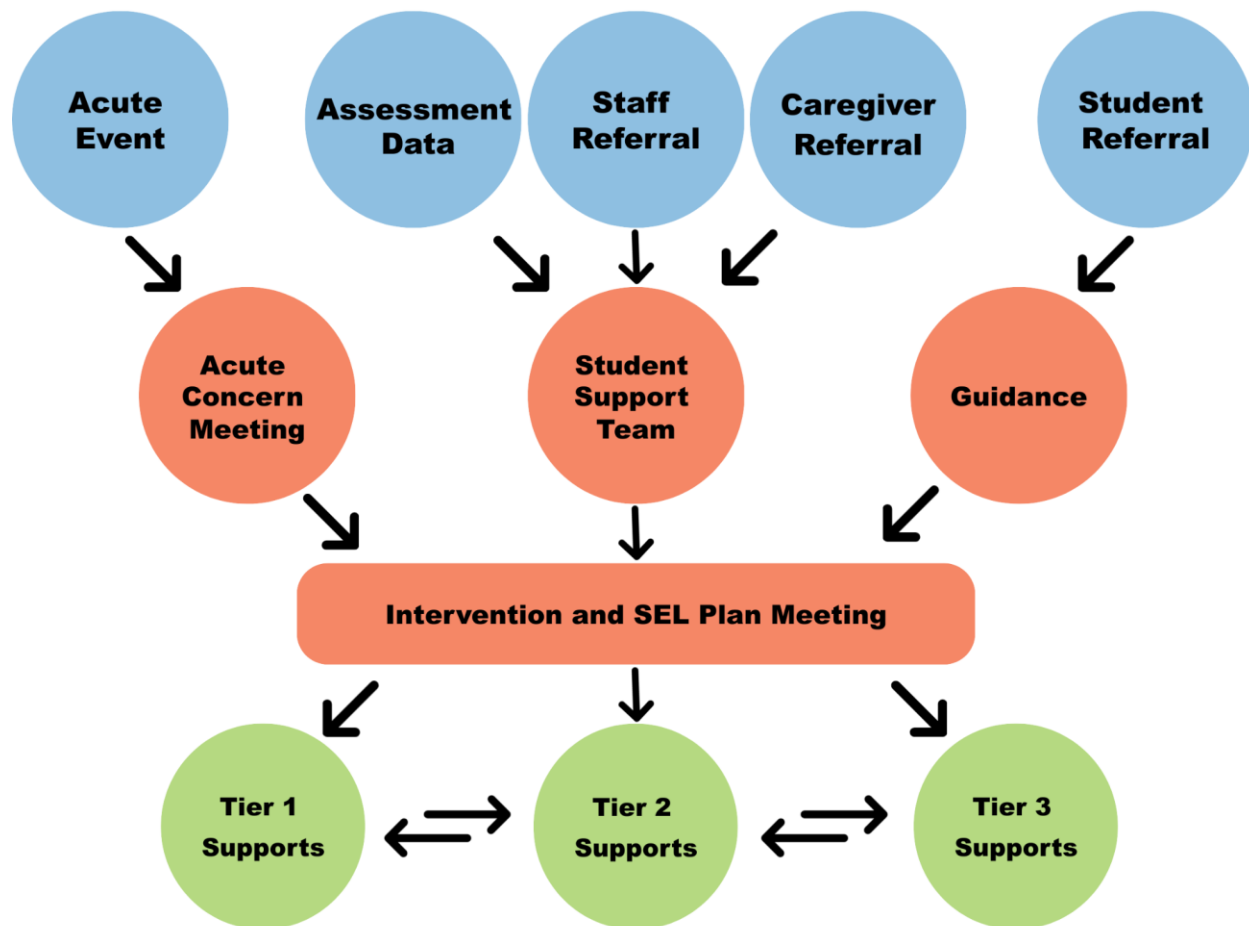


Diagram 1 shows the process of how students might receive Tier 1, Tier 2, and/or Tier 3 supports. Typically, the student in need of support can be identified in different ways: e.g., when an acute event occurs, using assessment data, or through a staff referral, caregiver referral, or student referral. If an acute event occurs such as a death in a student's family, a same-day meeting may be held to decide what immediate interventions are needed. If the student is identified through assessment data, by a staff member, or by a caregiver, a problem solving team (e.g., student support team) reviews the information. If the student identifies their own needs, they may access support through the guidance staff. From there, the student is provided tiered supports based on their level of need.

Diagram 2.

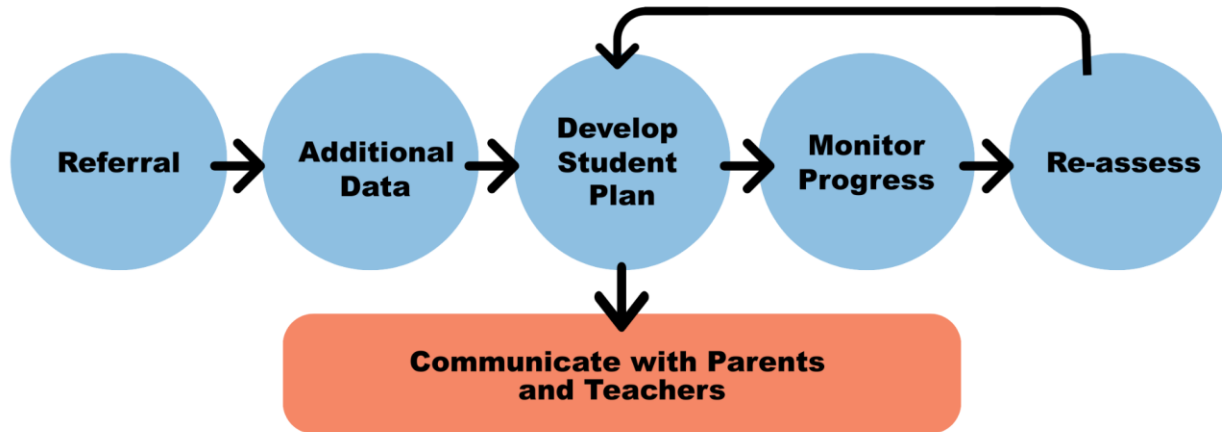


Diagram 2 shows how referrals typically progress. First a referral for a student is made, most likely by a teacher or another adult in the building. Next, additional data is collected, often by a counselor or other mental health or behaviorist professional. Based on the data, a student plan is developed and implemented. The plan is developed by the Student Support Team and communicated to parents and educators, as appropriate. The student's progress is then monitored. After a period of time, the student's progress toward goals and level of need is re-assessed, and the plan is reviewed and revised as necessary.

Using the provided examples as inspiration, draft a visual model of your school/district's process and/or systems for identification, matching, and monitoring.

> Part 3: Guiding Questions

Use the guiding questions below to reflect on your school or district's process.

1. **Across our identification, matching, and monitoring systems, where are we particularly strong?**
2. **Where do we see opportunities for improvement across these systems?**
3. **What are 1-2 next steps we plan to take based on this activity?**

Next Steps:

