

National PBIS Leadership Forum | October 22 - 23, 2025 | Hilton Chicago    @PBISForum
#pbisforum

1G Screening, Triage, & Assessment: Data-Informed Approaches to Meeting Students' Multiple Needs

Presenters:
Tona McGuire, University of Washington
Kelcey Schmitz, University of Washington
Kathleen Lynne Lane, University of Kansas

- **Topic:** Crisis Preparation, Response, & Recovery
- **Keywords:** Screening, Trauma

The National PBIS Leadership Forum is a technical assistance activity of the Center on PBIS   

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Learning Objectives

1. Define screening, assessment, and triage
2. Explain how to use systematic screening and triage efforts in the K-12 context
3. Support recovery phase efforts

National PBIS Leadership Forum   

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Agenda

- Welcome and Introductions
- Systematic Screening in Tiered Systems
- Triage & Recovery Phase Efforts
- Closing Out and Moving Forward

Institute of Education Sciences, U.S. Department of Education
R324N190002 University of Kansas 

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Welcome and Introductions

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Meet our team!

Tona McGuire



Kelcey Schmitz



Kathleen Lynne Lane



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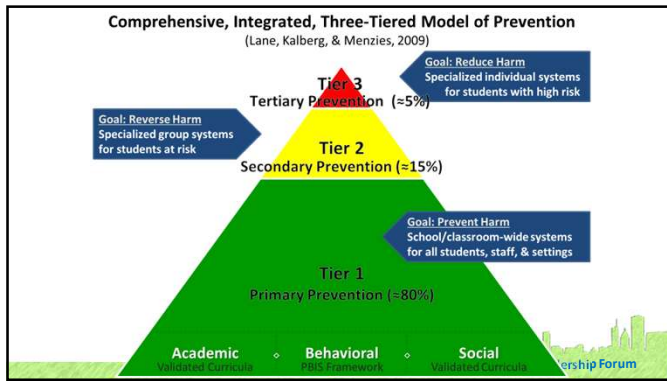


Systematic Screening in Tiered Systems

Kathleen Lynne Lane



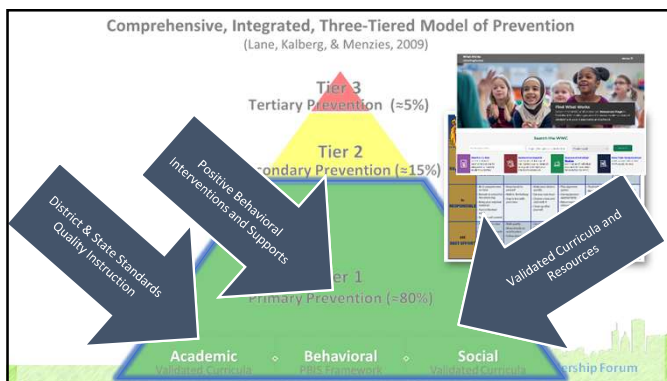
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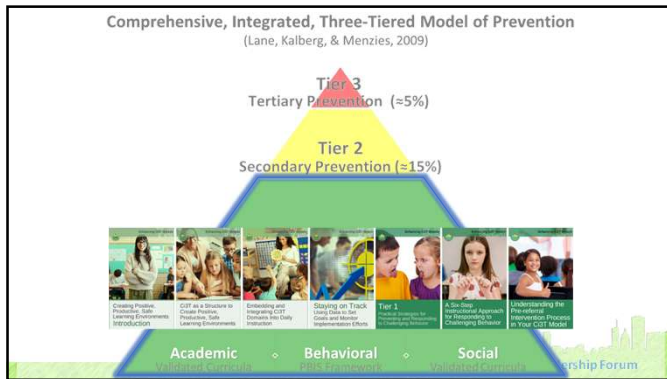
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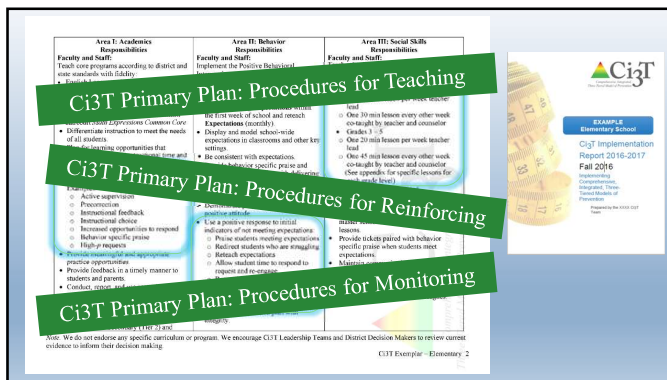
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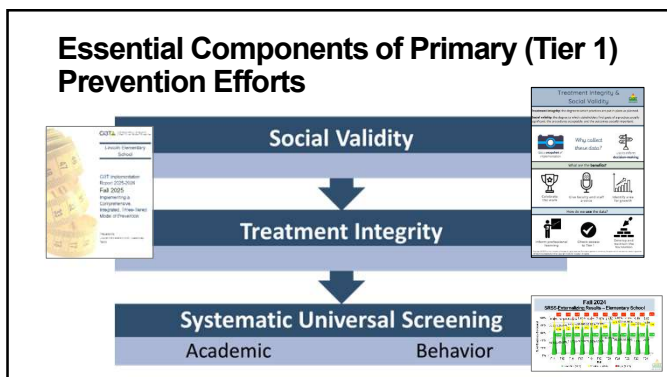
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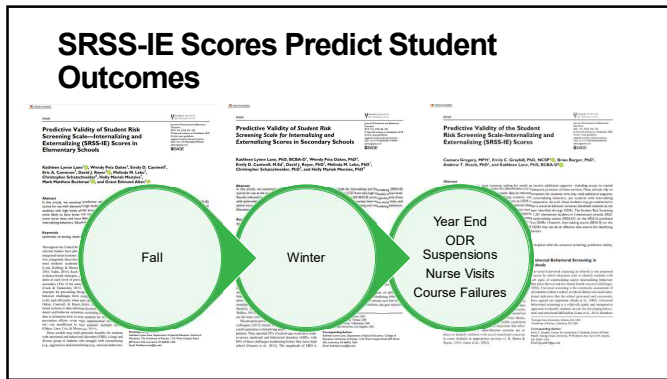
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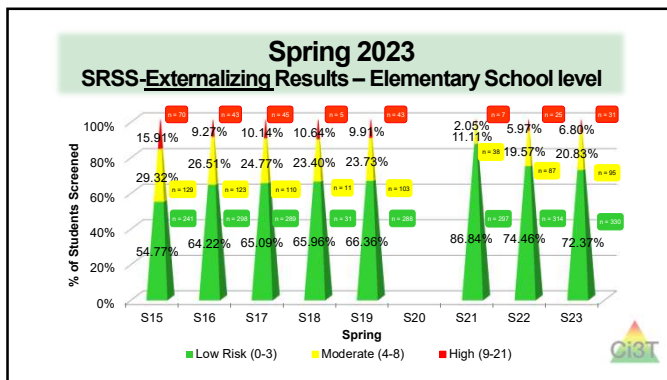
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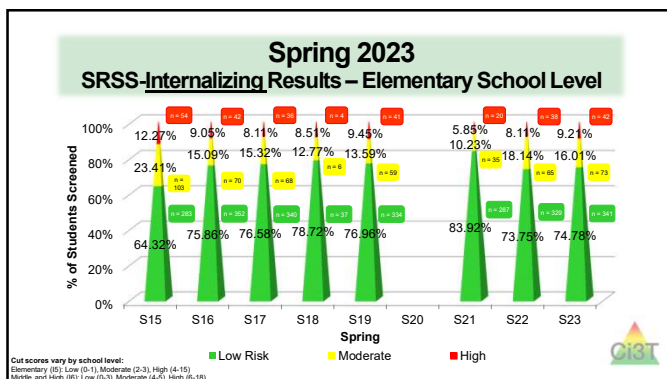
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Spring 2023 SRSS-Internalizing Results – Elementary Grade Level				
Grade Level	N Screened	Low n (%)	Moderate n (%)	High n (%)
3	62	51 (82.26%)	11 (17.74%)	0 (0.00%)
4	81	62 (76.54%)	13 (16.05%)	6 (7.41%)
5	90	64 (71.11%)	13 (14.44%)	13 (14.44%)

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Integrated Lesson Plan									
Topic									
Standards									
Core Lesson Elements									
Tier 1 (for all)									
Equitable Access and Inclusion									
Differentiated Objectives									
Academic Objective(s)									
Social Skills Objective(s)									
Behavioral Expectation(s)									
Teacher Reflection									
Active Supervision (AS) Behavior Specific Praise (BSP) High-F Request Sequence (HFRS) Instructional Choice (IC) Instructional Feedback (IF) Opportunities to Respond (OTR) Pre-correction (PC)									
0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3									
Most individual student plan for academic, social skills, and behavioral supports.									
What went well?									
What did not go as expected?									
What would I change in the future?									

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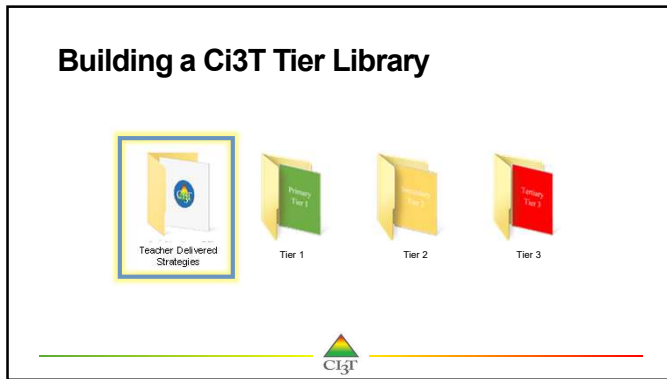
Examining Academic and Behavioral Data

Teacher Name	B. Collins							
Date: December 2024								
		1 Average or Above	0-1 Low	0-1 Low	0-1 Low			
		2 Below Average	4-8 Moderate	2-3 Moderate	2-5 Moderate			
		3 Well Below Average	9-25 High	6-15 High	6+ High			
Student Name	Student ID	AIMSweb Reading	AIMSweb Math	SRSS-E7 Behavior	SRSS-E5 Internalizing	ODR	Total Days Absent	
Alley, Allison	2310	1	1	1	1	0	0	
Alwell, Monte	2013	1	1	0	0	0	0	
Bonds, Peter	2015	2	2	4	0	3	0	
Booker, Abbie	2005	1	2	0	2	1	3	
Cartwright, Ashley	2132	1	1	0	0	0	0	
Cox, Lucille	2002	2	3	2	10	0	0	
Hankins, Erin	2017	1	1	0	0	0	0	
Isliou, O'Yam	2132	3	2	6	2	9	2	
Justice, Jesse	2003	2	2	3	1	0	0	
Ochoa, Kelly	2009	1	2	0	3	0	0	
Parker, Stephanie	2004	1	2	4	0	0	0	
Paul, Timothy	2020	1	1	3	0	0	0	
Reed, Kendra	2022	3	0	16	2	28	3	
Toms, Blake	2028	1	2	0	0	0	0	
Wellington, Jasper	2215	2	3	14	4	9	0	

Lane, K. L., Mentes, H. M., Ennis, R. P., & Oakes, W. P. (2015). *Supporting Behavior for School Success: A Step-by-Step Guide to Key Strategies*. Guilford Press.

Lane, K. L., Menzies, H. M., Ennis, R. P., & Oakes, W. P. (2015). Supporting Behavior for School Success: A Step-by-Step Guide to Key Strategies. Guilford Press.

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Low-Intensity Strategies

ci3t.org/enhance

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Low-Intensity Strategy	Franklin High School On-Site Expert
Behavior-Specific Praise: Identifying the specific expectation the student met. "Niamia, I noticed you outlined your paper and used the graphic organizer to draft your essay. Well done!" "Justice, thank you for pushing in your chair to keep the walkway safe."	- Eric Common, Behavior Specialist - Mark Buckman, Special Education - Grant Allen, Parent Volunteer - Paloma Pérez-Clark, School Psychologist
Opportunities to Respond: Providing 4-6 opportunities per minute for students to respond individually, choral, verbal, written, gesture, or symbol. "Show me thumbs or thumbs down if..." "Show me on your white board what..." "Turn to your elbow partner and say..." "All together now, what is..."	- David Royer, Administration - Emily Cantwell, 12th Grade - Scarlett Lane, 11th Grade - Mallory Messenger, Counselor
Instructional Choice: Providing within-task or between task choices to increase academic engaged time and motivation. "Ronaldo, out of our 3 learning objectives today, which would you like to work on first?" "Suzy, do you want to work on the laptop, or handwrite your answers for this assignment?"	- Abbie Jenkins, 10th Grade - Scarlett Lane, 11th Grade - José Sousa, PE - Liane Juhl, 9th Grade

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Secondary (Tier 2) Intervention Grid for Middle and High School Students				
Support	Description	School-wide Data: Entry Criteria	Data to Monitor Progress	Exit Criteria
Self-monitoring	Strategy implemented by student and teacher to improve academic performance (completions/accuracy), academic behavior, or other target behavior.	Behavior: ☐ SRSS-E7 score: Moderate (+4-8) or ☐ SRSS-E7 score: High (9-21) or ☐ 2 or more office discipline referrals (ODR) or ☐ Skyward: 2 or more missing assignments AND/OR Academic: ☐ Report card: 1 or more course failures or ☐ AIMSweb: intensive or strategic level (math or reading) or ☐ Below 2.5 GPA	Work completion and accuracy of the academic area of concern (or target behavior named in the self-monitoring plan) Passing grades on progress reports Social Validity: Teacher: IRP-15 Student: CIRP Treatment Integrity: Implementation & treatment integrity checklist	SRSS-E7 score: Low (1-3) Passing grade on progress report or report card in the academic area of concern (or target behavior named in the self-monitoring plan)

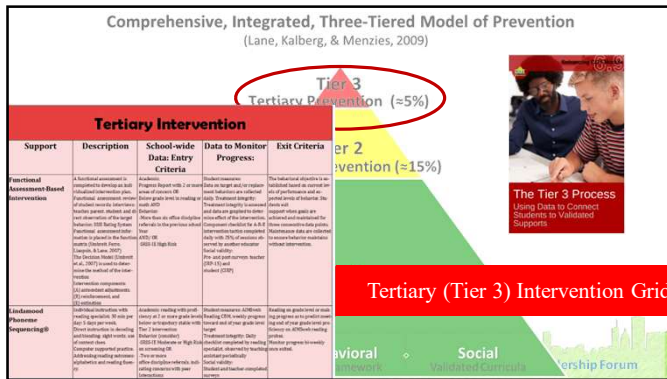
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Using multiple data sources									
School-wide Data: Entry Criteria									
☐ SRSS-E7 score: Moderate (+4-8) ☐ SRSS-E7 score: High (9-21) ☐ 2 or more office discipline referrals (ODR) or ☐ Skyward: 2 or more missing assignments AND/OR Academic: ☐ Report card: 1 or more course failures or ☐ AIMSweb: intensive or strategic level (math or reading) or ☐ Below 2.5 GPA									
Student Name	Academic History	Attendance Rate	SRSS-E7	Math-6	Other Transition Referrals	Attendance	Enrollment	Enrollment	Enrollment
11111Barnes, Mike	1	1	0	0	0	1	1	1	1
11112Cott, James	1	1	0	0	0	1	1	1	1
11113Carter, Ben	1	1	0	0	0	1	1	1	1
11114Fox, Lutz	1	1	0	1	0	0	0	0	0
11115Palmer, Julie	1	1	0	1	1	1	1	1	1
11116Smith, Henry	1	1	0	1	0	0	0	0	0
11117Cromwell, Jimmy	1	1	0	0	0	0	0	0	0
11118Coffey, Allen	1	1	0	0	0	0	0	0	0
11119Hart, Chad	1	1	0	1	1	1	1	1	1
11120Harris, Alan	1	1	0	1	0	1	1	1	1
11121Lynn, Carly	1	1	0	1	0	0	0	0	0
11122Lynn, Brad	1	1	1	1	1	0	0	0	0
11123Harris, David	1	1	0	1	0	0	0	0	0
11124Mason, Jill	1	1	0	0	1	1	1	1	1
11125Parker, William	1	1	0	0	0	0	0	0	0
11126Shaw, Robert	1	1	0	0	0	0	0	0	0
11127Smith, David	1	1	0	0	0	0	0	0	0
11128Smith, Kathryn	1	1	1	0	0	1	1	1	1
11129Harris, Laverne	1	1	0	1	0	0	0	0	0
11130Hart, Jay	1	1	0	1	0	0	0	0	0

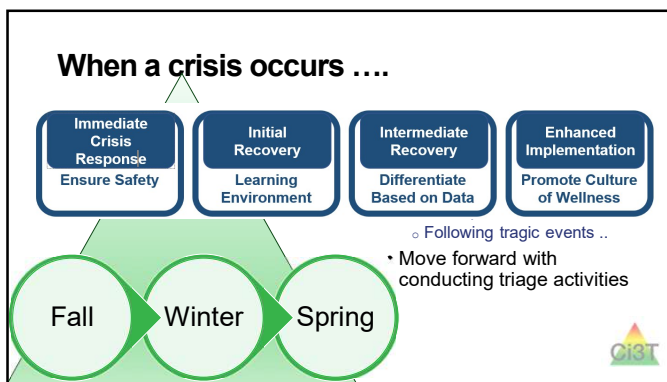
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Comprehensive, Integrated, Three-Tiered Model of Prevention (Lane, Kalberg, & Menzies, 2009)				
Secondary (Tier 2) Interventions				
Support	Description	School-wide Data: Entry Criteria	Data to Monitor Progress	Exit Criteria
Self-monitoring	Includes steps to self-monitoring progress and self-reflection. Includes a self-reflection form. Includes a self-reflection form. Includes a self-reflection form.	☐ SRSS-E7 score: Moderate (+4-8) ☐ SRSS-E7 score: High (9-21) ☐ 2 or more office discipline referrals (ODR) or ☐ Skyward: 2 or more missing assignments AND/OR Academic: ☐ Report card: 1 or more course failures or ☐ AIMSweb: intensive or strategic level (math or reading) or ☐ Below 2.5 GPA	Work completion and accuracy of the academic area of concern (or target behavior named in the self-monitoring plan) Passing grades on progress reports Social Validity: Teacher: IRP-15 Student: CIRP Treatment Integrity: Implementation & treatment integrity checklist	SRSS-E7 score: Low (1-3) Passing grade on progress report or report card in the academic area of concern (or target behavior named in the self-monitoring plan)

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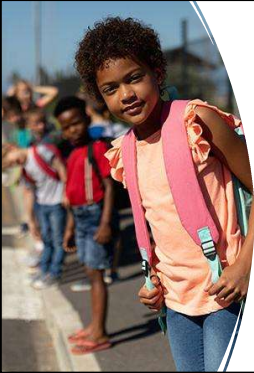


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Integrating Psychological Triage into School Screening

Tona McGuire, Ph.D.
PBIS Leadership Conference Oct 2025

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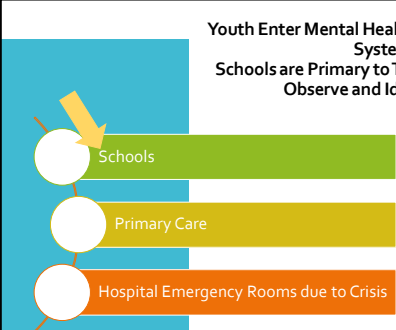
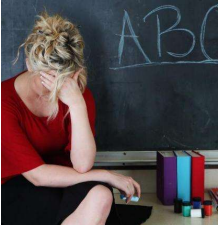


Even at “Baseline” There Are Not Enough Mental Health Providers to Address Youth Needs

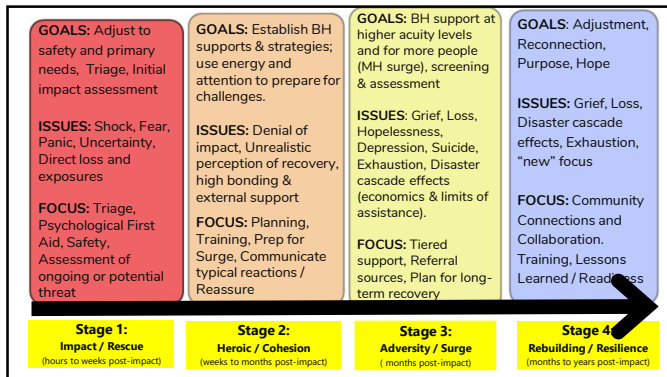
- Disproportionate impact on children and youth of color and lower SES
- Lack of access due to location or time required to engage in in-person services
- Cost of care and limitation of care in both state and private insurance creates barriers

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**Youth Enter Mental Health Care Via “Touchpoints” and Systems of Care:
Schools are Primary to This With Broader Capacity to Observe and Identify At-Risk Youth**

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Normative and Non-Clinical Reactions

- Worries and fears (increase or new)
- Sadness
- Anger or irritability
- Separation anxiety (particularly in the young)
- Sleep disturbances & nightmares
- Loss of interest in normal activities
- Reduced concentration
- Decline in school performance
- Somatic complaints
- Developmental changes or regressions

All of these can also be present or at increased risk for Children and Youth with Special Healthcare Needs/ and Children with Neurodevelopmental and Cognitive conditions who experience disruption to routine (e.g., care, social, sensory).

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Post-Traumatic Stress Disorder

~20-40% with new incidence disorder(s) (e.g., PTSD) after disaster or other traumatic event

Once established, PTSD is frequently:

- More complex
- Interferes with school success and development
- Takes longer to treat
- An integrated - triage, screening, and intervention care model are important to reduce disaster/crisis event-related mental health risk
- "One size does not fit all"

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Rapid Triage of Experience vs. Distress Symptoms

Acute Stress Symptoms(<40 day are NOT predictive of clinical PTSD or depression)



How do you practically predict PTSD at the time of disasters and everyday traumatic events in touchpoints?



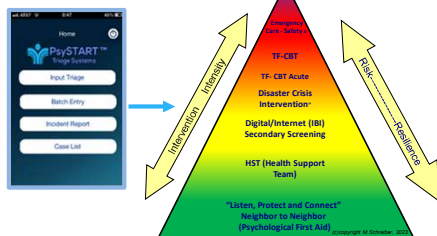
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Matching Intervention to Level of Risk

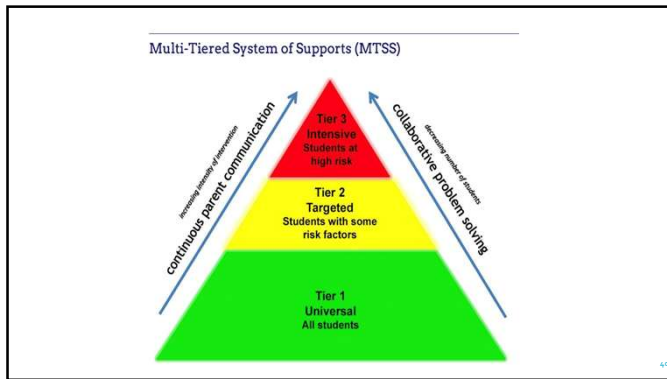
Goal:

Promote the right amount of support to the right children

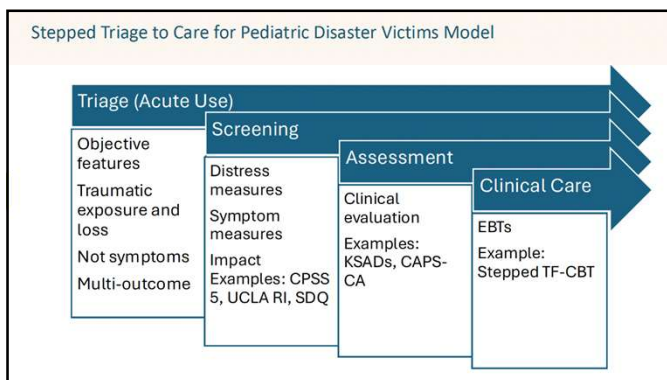


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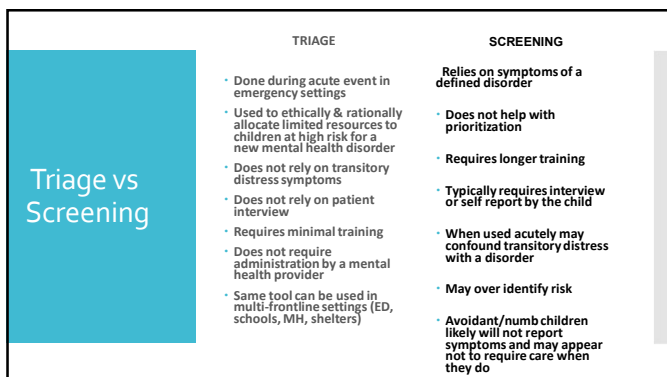
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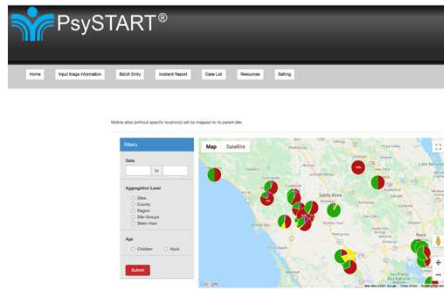
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Psychological Simple Triage and Rapid Treatment (PsySTART)®

- Takes 2 minutes or less to complete
- Is not based on symptoms of distress, but on direct trauma exposures and losses
- Evidence-based reliably predicts risk of PTSD and co-occurring conditions such as depression
- Can identify those children at highest risk, allowing for equitable prioritization of scarce mental health resources
- Provides decision support to providers
- Has demonstrated feasibility in disasters, community violence events, pediatric trauma activations
- Can be used in paper form or electronic

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De-identified and Aggregated Data can provide situational awareness in large events



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In the immediate impact of a Crisis Event or Disaster Start Here

Identify trauma exposure and traumatic loss

PsySTART® Mental Health Triage System	
EXPRESSED THOUGHT OR INTENT TO HARM SELF OR OTHERS?	
FELT OR EXPRESSED EXTREME PANIC?	
FELT DIRECT THREAT TO LIFE OF SELF OR FAMILY MEMBER?	
SAW / HEARD DEATH OR SERIOUS INJURY OF OTHERS?	
MULTIPLE DEATHS OF FAMILY, FRIENDS OR PEERS?	
DEATH OF IMMEDIATE FAMILY MEMBER?	
DEATH OF FRIEND OR PEER?	
DEATH OF PET?	
SIGNIFICANT DISASTER RELATED ILLNESS OR PHYSICAL INJURY OF SELF OR FAMILY MEMBER?	
TRAPPED OR DELAYED EVACUATION?	
HOME NOT LIVABLE DUE TO DISASTER?	
CHILD CURRENTLY SEPARATED FROM ALL CAREGIVERS?	
FAMILY MEMBERS WHO ARE CURRENTLY SEPARATED OR MISSING?	
HEALTH CONCERNS DUE TO EXPOSURE OR CONTAMINATION AND EXPERIENCED MEDICAL TREATMENT OR DECONTAMINATION DUE TO EXPOSURE?	
PRIOR HISTORY OF EITHER TRAUMA/LOSS, MENTAL HEALTHCARE, DRUG OR ALCOHOL USE FOR SELF OR FAMILY MEMBER?	
SELF NOT RECEIVING SUFFICIENT SUPPORT FROM OTHERS (SUCH AS SOMEONE TO TALK TO)?	
VERY OFTEN DO NOT HAVE ENOUGH TO EAT, CLEAN CLOTHING TO WEAR OR A SAFE PLACE TO GO?	
CANNOT GET HELP NEEDED WHEN SICK?	
EXPOSURE TO DOMESTIC VIOLENCE, EMOTIONAL, PHYSICAL OR SEXUAL ABUSE?	
NO TRIAGE FACTORS IDENTIFIED?	

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What Happens After Positive Triage?

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For An Individual Child

- Using a "floating" algorithm, children who have 2 or 3 PsySTART Triage risk factors are referred for additional screening by a MH provider either within the triaging organization or by a community provider
- If outside resources are available, children demonstrating high risk for potential PTSD would be referred to local community resources for outpatient care, preferably an evidence-based intervention such as TF-CBT

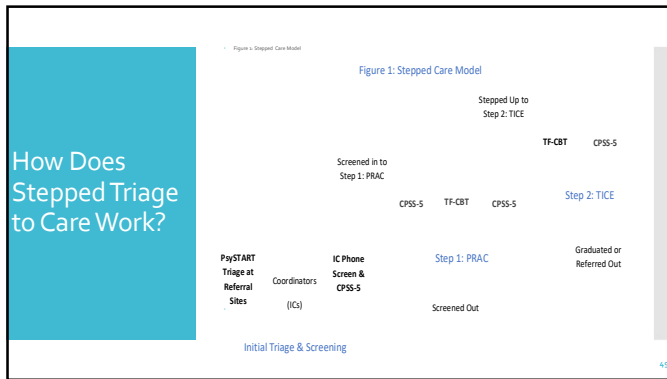


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Increasing Access when Mental Health Resources are Insufficient

- **Stepped** Triage to Trauma-Focused Cognitive Behavioral
- Positive PsySTART cases assigned to Stepped TF-CBT
- Tele-Behavioral Health, in person, or hybrid
- "stepped model" increases individual provider efficiency by 60+%, allowing more children to be served

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Thank you!
Questions?
tlmcgo1@gmail.com

For more information on PsySTART, please reach out to
Dr. Merritt Schreiber m.schreiber@ucla.edu

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SMART
Supporting Mental Health
Access to Resources

W

**Universal Social, Emotional,
Behavioral, and Mental Health
Screening in Washington State**

Kelcey Schmitz, MEd, Project Director
UW Haring Center, College of Education & UW SMART Center, School of Medicine
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UNIVERSITY of WASHINGTON

Special Acknowledgement:
Rayann Silva, Mari Meador, Larissa Galias, Casey Edhe, Bethlehem Kebede

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SMART
Supporting Mental Health & Emotional Response

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 Inclusionary Practices Resources
<https://ppdemosites.org/resources-artifacts/>



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SOCIAL, EMOTIONAL, BEHAVIORAL, AND MENTAL HEALTH SCREENING IN WASHINGTON STATE

2014
 Authorizing State Legislation for recognition, screening and response to emotional or behavioral distress

2014
 State Legislation for Model District Plan RCW 28A.320.1271

The office of the superintendent of public instruction's school safety center, established in RCW 28A.300.630, shall develop a model school district plan for recognition, initial screening, and response to emotional or behavioral distress in students, including but not limited to indicators of possible substance abuse, violence, and youth suicide.

The model plan must incorporate research-based best practices, including practices and protocols used in schools and school districts in other states.

The model plan must be posted by **February 1, 2014**, on the school safety center website, along with relevant resources and information to support school districts in developing and implementing the plan required under RCW 28A.320.127.




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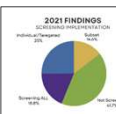
2014
 Authorizing State Legislation for recognition, screening and response to emotional or behavioral distress (RCW 28A.320.127)

2014
 State Legislation for Model District Plan RCW 28A.320.1271

2021
 K-12 Behavioral Health Audit & Findings and Recs for SEBMH Screening

2022
 OSPI Model District Template for Installing Universal SEBMH Screening

2025
 WA Legislative Landscape Analysis of Universal Screening



2021 FINDINGS
 School Districts implementing plan: 100%
 Not Screening: 0%
 Screening in 100%
 Not Screening: 0%





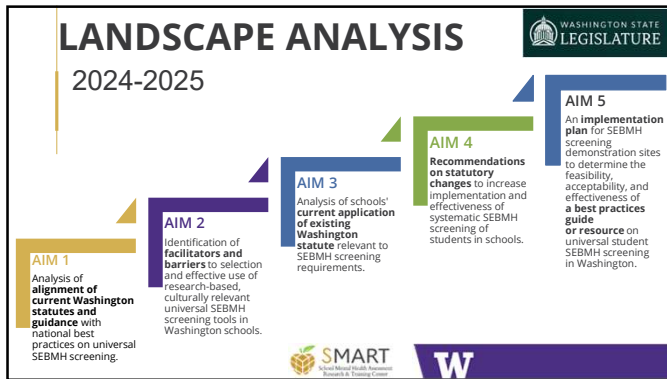




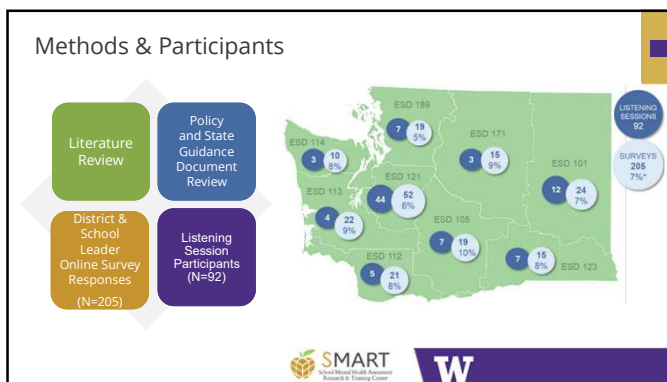


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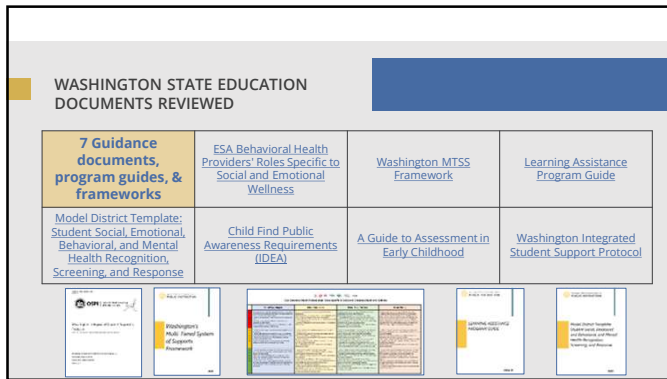
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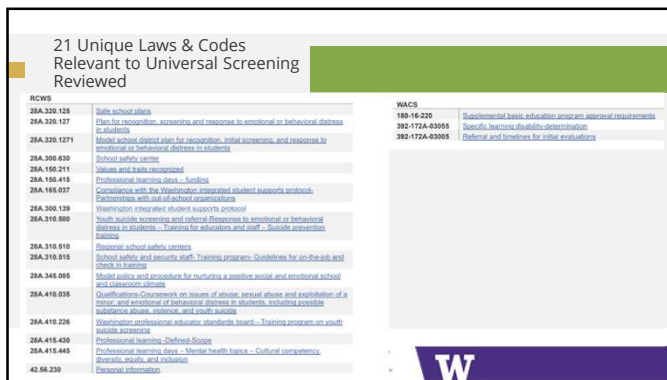
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Substantial Support for Screening

- “Anything that can be brought forward that puts us in a proactive mode versus a reactive mode for the health and well-being of our students and our children and our families is a plus”
-Family Listening Session Participant
- “I think when it’s feasible and we’re able to utilize universal screening tools, there can be huge impacts on equity and access”
-District Administrators Listening Session Participant
- “It is incredibly valuable to screen as many students as we possibly can. We are a small district, and know our students very well, so often the screening tool matches with what we know/see. However, there are times it does not and by having the screening data available when we meet with students, we are able to have deeper conversations with some students who were not sure who to go to or how to share what has been on their minds. Very effective tool.”
-District Leader Survey Respondent

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Lack of clear definition and shared understanding

- 21 unique laws and codes** relevant to universal screening in schools - none included all elements of best practice.
- RCW 28A.300.139 *Washington Integrated Student Support Protocol* - majority referenced
- 7 relevant Washington guidance documents, program guides, and frameworks** found limited coverage of universal screening best practices
- No consistent definition of screening across policy or guidance documents
- Contributed to a lot of misunderstanding in listening sessions and surveys about what screening is and how to implement

“My AHA moment as we’re having this discussion is: I think we all have different definitions of universal screening, even from the one stated.”
- Listening Session Participant

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Inconsistent implementation

- About half of schools and districts reported conducting screening
- Amongst those screening, **high variation** in:
 - What **tools** are being used (and whether a validated tool designed for screening is being used)
 - How often** screening is occurring
 - What **training** is provided for school staff regarding screening processes
 - What **information is communicated** to students, parents, and other community members
 - Who is **reviewing** screening data and how frequently
 - How decisions are being made to **link students to follow-up supports**

Districts Screening (N=59)

Response	Percentage
No	49%
Unsure	3%
Yes	47%

Schools Screening (N=146)

Response	Percentage
No	45%
Unsure	8%
Yes	46%

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Structural Barriers

Top Challenges Identified by Districts

Lack of internal (school) resources to refer students requiring follow-up

Lack of external (community) resources to refer students requiring follow-up

Cost to conduct screening

Survey/assessment fatigue

Lack of knowing about how to implement (e.g., which tools to use, resources needed, etc.)

"I would state that most of our district agrees with this work and knows the value and importance of it. There are two areas we need support from our state. We need money and we need implementation support. The disagreements often come with the who, when, and where... not the why."

- District Leader Survey Respondent

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RECOMMENDATIONS

- Develop a clear definition of universal SEBMH screening
- Update state laws and policies to reflect current realities, needs, and best practices for universal SEBMH screening
- Develop statewide guidance, standards, and procedures
- Strengthen alignment, integration, and coordination of agencies, partners, initiatives, and frameworks relevant to developing, resourcing, and implementing a comprehensive, accessible, and equitable K-12 mental health system
- Provide implementation funding and resources
- Enhance family and student and engagement
- Provide comprehensive implementation supports
- Ensure screening processes and policies counteract inequities
- Establish indicators of success for conducting evaluation, monitoring, and data-informed continuous quality improvement

School Mental Health Assessment, Research, and Training (SMART) Center. (2025). A Landscape Analysis of Universal Social, Emotional, Behavioral and Mental Health (SEBMH) Screening in Washington State Schools and Districts Final Report [Report to WA State Legislature as directed by ESSB 5950 (2023-24)]. University of Washington.

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Learning about Universal Mental Health Screening Implementation in Washington

2025

FINAL LEGISLATIVE REPORT

A Landscape Analysis of Universal Social, Emotional, Behavioral and Mental Health (SEBMH) Screening in Washington State Schools and Districts

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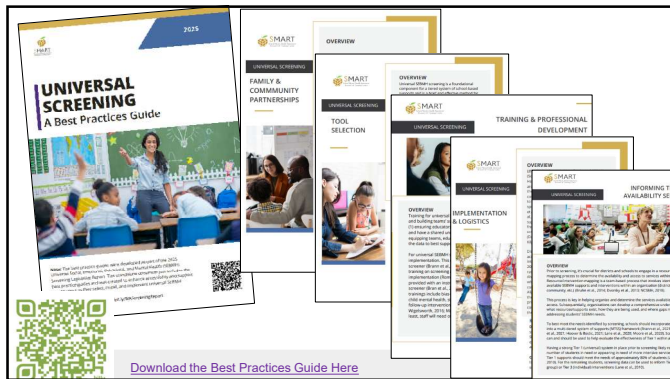
- Executive Summary
- Background
- Study Purpose and Scope
- Methodology
- Findings
- Recommendations
- Appendix

5 Best Practice Guides included

LINK TO REPORT

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Scaling Up Universal Screening: Training and Technical Assistance

- > **Donor-funded Regional Capacity Building**
 - Prevent, Detect, Connect: Initial Cohort includes 3 Regional Educational Service Districts (ESDs) & 10 districts
- > **Federal and State Inclusionary Practices Funding**
 - Inclusionary and Integrated Mental Health Education and Supports through the Washington Office of Superintendent of Public Instruction (OSPI) Inclusionary Practices Technical Assistance Network (IPTN)





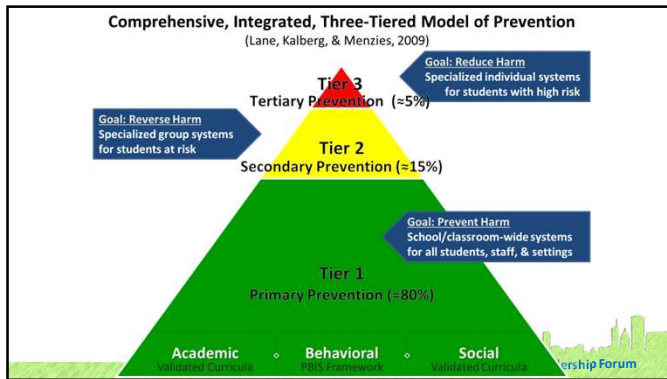
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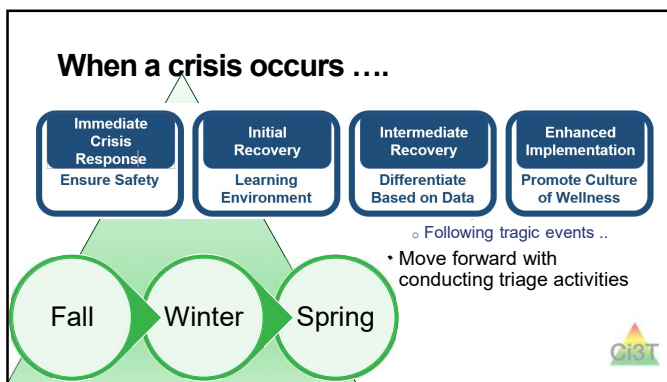


Closing Out and Moving Forward

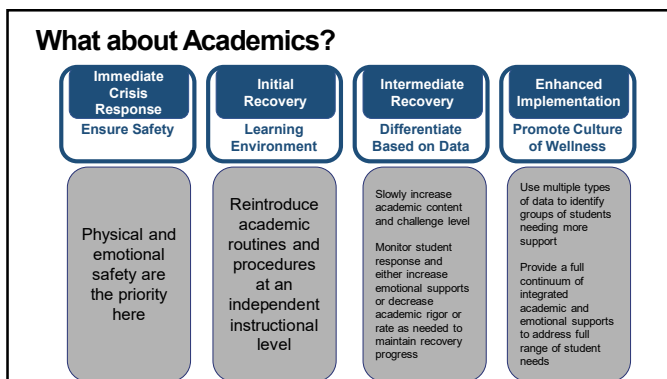
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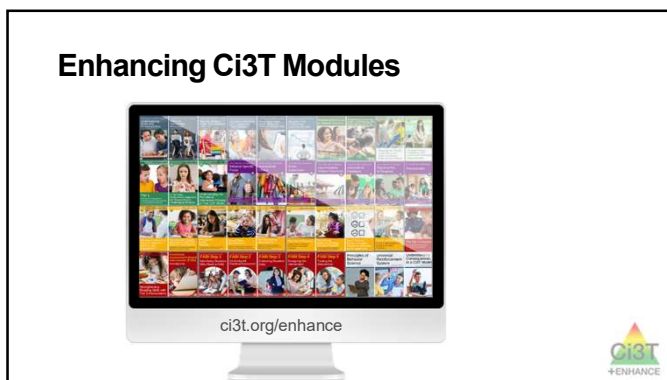
Planning for Integrated Instruction

Integrated Lesson Plan

Topic		Active Supervision Behavior Specific Praise High P Request Response Instructional Choice Instructional Feedback Opportunities to Respond Precorrection
Standards		
Core Lesson Elements		
Tier 1 (for all) Equitable Access and Inclusion (Differentiated Objectives)		
Academic Objective(s)		
Social Skills Objective(s)		
Behavioral Expectation(s)		
Teacher Reflection		
Implementation (lower or all, 1=limited, 2=partial, 3=full) Active Supervision (AS) Behavior Specific Praise (BSP) High P Request Sequence (HPRS) Instructional Choice (IC) Instructional Feedback (IF) Opportunities to Respond (OTR) Precorrection (PC)		
0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3 0 1 2 3		
Met individual student plan for academic, social skills, and behavioral supports. 0 1 2 3		
What went well?		
What did not go as expected?		
What would I change in the future?		



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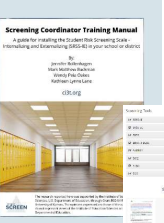
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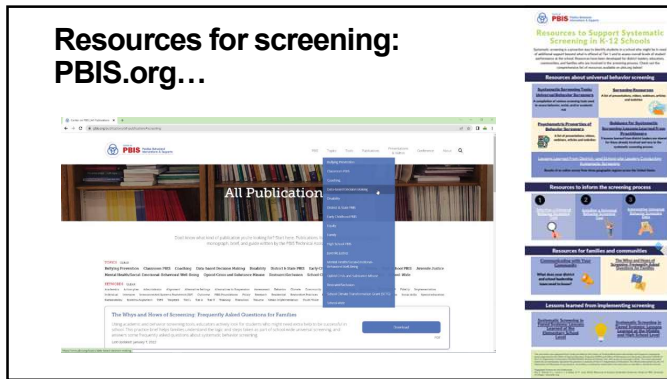
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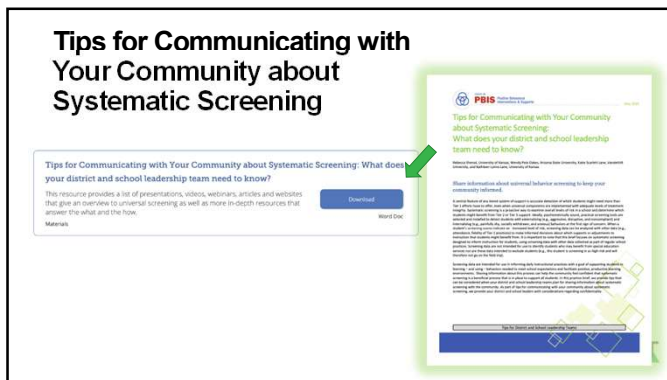




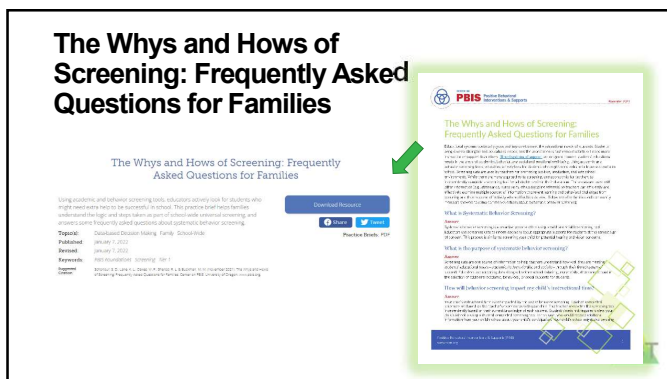

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