Documenting Technical Assistance Activities (TAM – SWTA) Protocol

Purpose

As part of our mission to positively impact and support special education personnel, providing technical assistance (TA) is a core responsibility of PaTTAN staff. This protocol outlines the process for documenting TA activities, ensuring they are recorded accurately and systematically. TA activities include meetings, workshops, and coaching sessions conducted with specific Local Education Agencies (LEAs), agencies, and/or organizations to address their unique needs. Activities provided as part of customized support cases must be documented with a corresponding case ID. Additionally, TA activities (meetings, workshops, or coaching) that are not associated with a specific customized support case should also be entered into SWTA but will not have a specific case ID. This documentation ensures all efforts are tracked, reflecting PaTTAN's commitment to supporting the field comprehensively.

Important Note: Events entered into Wisdomwhere (conference sessions, webinars, in-person trainings) for which registration is collected and reported are not to be recorded in the State-Wide Technical Assistance (SWTA) database.

Technical Assistance Formats

- **Coaching**: Customized support to individuals or groups to develop their skills and/or improve performance. It focuses on building capacity through tailored feedback, modeling, and practice opportunities. It may include work to refine instructional practices, implement evidence-based strategies, or address specific challenges within their roles.

- **Meeting:** Structured, scheduled gathering to share information, discuss plans, and/or make decisions. Meetings may include webinars, in-person and virtual sessions, and individual phone calls to address an immediate need.

- **Workshop**: Training session designed to build knowledge or skills on a specific topic. It often includes presentations, hands-on activities, and group discussions. Workshops may be held at PaTTAN offices, LEA/agency locations, or online.
    - *Note: A SWTA record is required for all workshops when registration is not done through Wisdomwhere.*

Prior to Entry: Determine if the activity is a meeting, coaching, or workshop. If yes, proceed with the entry.

Responsibilities for Documenting TA Activities

- **Lead PaTTAN Consultant**
    - Ensure an entry of the TA activity is completed.
- **Timeliness**
    - Document entries by the end of the business week in which the activity occurred.
- **Ongoing Work**
    - Create a new entry for each TA activity as part of ongoing work.

Specific Guidance for Entering TA Activities

1. **Attendance Documentation**:

    - For virtual TA:

        - Use the chat feature to collect attendance and save the chat for reference.

        - Alternatively, enable registration within the platform (e.g., Zoom) to track attendance.

    - For in-person TA:

        - Consider using the provided **SWTA sign-in sheet** for small to mid-size groups.

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- For larger groups, request participant counts by role from the LEA/Agency contact.

2. **Email Communication**:

   o Emails categorized as "coaching" to online course participants or individuals are to be entered into the SWTA database.

   o When sending similar emails to multiple participants, create a single entry and list all relevant LEAs.

   o Use the notes field to elaborate on specific details about the TA activity.

Accessing the SWTA Database

The SWTA Database is hosted within the **Technical Assistance Management System (TAM)**.

- URL: https://tam.pattan.net/login

- Login: Established Microsoft credentials

- **Timeout Warning**: Entries remain active for 60 minutes. Incomplete entries left inactive for over 60 minutes will not be saved.

Additional Notes

- Include participant roles and associated LEAs in every entry.

- Ensure all required fields are completed to avoid data loss due to inactivity.

- View the recording of how to submit a SWTA record using this link https://www.youtube.com/watch?v=wxIP3NOX-i0. The recording link is also available within the TAM-SWTA database.

This protocol serves as a guide to ensure consistency, accuracy, and timeliness in documenting technical assistance activities provided by PaTTAN staff.

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Name of Field	Type of Field (Drop down, or text)	Definition / Comment
Calendar Invite (not required)	Drop down	This optional feature may be used when scheduling technical assistance with an LEA/organization/individual. TAM will generate and distribute the calendar invite. The lead consultant can schedule TA via the calendar request.
Title (required)	Text	Provide a descriptive title of the technical assistance activity to convey the purpose of the TA event. Titles may be reused as they are not unique identifiers for SWTA submission
Start Date and Time of Technical Assistance (required)	Date/Time Selection	Select the start date and time of the TA activity using the calendar and clock provided.
End Date and Time of Technical Assistance (required)	Date/Time Selection	Select the end date and time of the TA activity using the calendar and clock provided. When the TA occurs on multiple, ***non-concurrent*** days, additional entries (one per day) should be completed.

Add New Site/Bulk Add (required)	Drop down	These fields are used to identify the receivers of the TA.
		
		"Bulk Add"
		
		✓ Select when the TA was provided to a) multiple school districts and all their schools, b) all schools within a district or c) all IUs within a PaTTAN Region
		✓ Case IDs are automatically linked by the system. If multiple matches occur, no case is linked.
		
		"Add New":
		
		✓ Select when entering a SWTA record for a single "receiver" of the TA.
		✓ Choose **Entity Type** (school district – including charter schools, intermediate unit, approved private school, early intervention, other)
		   ○ Select other for higher ed, agencies, organizations.
		✓ Choose **"Entity Name"** from the list, which is in alphabetical order.
		   ○ When other is selected as entity, the user will manually enter the name of the agency/organization.
		✓ **Site**
		   ○ For SDs and IUs only – select if SWTA is specific to a site – enter yes or no, then select the site from dropdown.
		   ○ For APS and "other" – site is not a required field.
		
		"Align to Existing Support Case": Search to find a case associated with the SWTA record currently being submitted. When the record being submitted is not associated with an existing support case, do not select a case id.

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		When finished adding sites: Click the "add" button to populate the SWTA record.
Special Project (not required)	Drop down	A "special project" is typically work that falls outside of a specific PaTTAN initiative. When the TA is associated with a "special project", select the appropriate project from the drop down. If the TA is not associated with a special project, leave this field blank.
Number of Participants (required)	Drop down	Select the number of participants that participated in/received the TA. You may type in a number and hit 'enter'. **Administrators/Supervisors/Directors** - Principals, Superintendents, Assistant Superintendents, LEA Directors, LEA Supervisors, IU Directors, IU Supervisors, Vocational Education Directors, Pupil Services **General Education Teachers -** All content areas, ESL, Vocational Education, Gifted **Special Education Teachers -** All special education teachers **Parents/Family Members –** Parents/family members receiving TA **Educational Specialists -** School Psychologists, School Counselors, Speech and Language Pathologist, Instructional Technology Specialists, School Nurses, Dental Hygienists, Home and School Visitors **Licensed Professionals -** Occupational Therapists, Physical Therapists, Social Workers, Behavior Analysts, Educational Interpreters **IU TACs -** IU TACs receiving TA **IU C&I Consultants -** IU Curriculum and Instruction consultants receiving TA **Paraprofessionals -** Paraprofessionals receiving TA **Students -** Students with disabilities receiving TA **Other Role -** Advocates, Higher Education, Agencies, Instructional Advisors, Coaches, PDE staff, etc.
Level (required)	Drop down	Select the level at which the TA was provided. Choices include – IU, LEA, Building, Classroom/Teacher, or Family.
Delivery (required)	Drop down	Select the primary mode by which the TA was provided. Choices include – Virtual, In-Person, or Hybrid.
Type (required)	Drop down	Select the primary category type for the TA provided. **Meeting** - Supportive and objective facilitation process used for focused conversations. This may include specific procedures or action steps for problem identification and strategies to reach the desirable, meaningful solution, and outcome measures. Examples: responses provided to online course participants, planning and data sharing, conversations regarding instructional design/delivery, classroom management
		Workshop - Provided (group) training for the purpose of showing and/or explaining content of a specific topic. Examples: Extended School Year, Formative Assessment, Principles of Effective Instruction
		Coaching - Provided guided practice, modeling, teaching, and/or constructive descriptive feedback to develop or enhance competence in the individual(s)

		being coached in such areas as program or content knowledge, instructional delivery techniques, classroom management, effective communication, probing for reflection and clarification. Examples: Enhanced Core Reading Instruction (ECRI), Classroom Management, Concrete-Representational-Abstract (CRA math intervention)
PaTTAN Staff (required)	Multiple select	Select all PaTTAN staff who delivered the technical assistance. This will link each individual to the record. Any individual linked to the record may view or edit it.
Collab IU (not required)	Drop down	Select the IU(s) for which consultant(s) ***assisted in delivery*** of the technical assistance
Notes (not required)	Text	This field can be used to document comments, details, and/or follow-up actions that aren't addressed elsewhere. TAM does not include notes in system generated calendar invites
Primary Pillar (not required)	Drop down	When applicable, select the pillar for which the TA is associated. If the TA is not specifically connected to an approved pillar project, leave pillar blank.
Primary Foundation (not required)	Drop down	When applicable, select the foundation for which the TA is associated. If the TA is not specifically connected to a foundation, leave foundation blank.
Primary Initiative (required)	Drop down	Select the primary PaTTAN initiative for which the TA is associated.
Collaborating Initiative (not required)	Multiple select	Select the PaTTAN initiative(s) that collaborated in delivering the TA.

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PaTTAN Technical Assistance Attendees - Please sign your name and check the category that best describes your role.
NOTE: Electronic template coming soon!

	Attendee Name	Role	
1		□ Administrator/Supervisor/Director □ Special Education Teacher □ Educational Specialist □ IU TaC □ Paraprofessional	□ General Education Teacher □ Parent/Family Member □ Licensed Professional □ IU C&I □ Student □ Other: _____
2		□ Administrator/Supervisor/Director □ Special Education Teacher □ Educational Specialist □ IU TaC □ Paraprofessional	□ General Education Teacher □ Parent/Family Member □ Licensed Professional □ IU C&I □ Student □ Other: _____
3		□ Administrator/Supervisor/Director □ Special Education Teacher □ Educational Specialist □ IU TaC □ Paraprofessional	□ General Education Teacher □ Parent/Family Member □ Licensed Professional □ IU C&I □ Student □ Other: _____
4		□ Administrator/Supervisor/Director □ Special Education Teacher □ Educational Specialist □ IU TaC □ Paraprofessional	□ General Education Teacher □ Parent/Family Member □ Licensed Professional □ IU C&I □ Student □ Other: _____
5		□ Administrator/Supervisor/Director □ Special Education Teacher □ Educational Specialist □ IU TaC □ Paraprofessional	□ General Education Teacher □ Parent/Family Member □ Licensed Professional □ IU C&I □ Student □ Other: _____

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PaTTAN Technical Assistance Attendees
Please place a tally mark next to the category that best describes your role.

ENTITY:		GRADES (if applicable):
Role		Tally
Administrator/Supervisor/Director		
General Education Teacher (including ESL, Vocational Education, and Gifted)		
Special Education Teacher (including SLP)		
Educational Specialist (including School Psych., Counselor, School Nurse)		
Licensed Professional (including OT, PT, Social Workers, Behavior Analysts, Educational Interpreters)		
IU TaC		
IU C & I		
Paraprofessional		
Other		