

# **EVALUATION PLANNING GUIDE**

August 2012

<b>Specific Learning Disability (SLD) SRBI Model</b>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	-Information Processing Interviews: Teacher(s)/Parent(s)/Student [if secondary level]	Special Education Teacher		
Academic Achievement	-Curriculum-Based Measurement at Current Grade Level in Academic Area(s) of Concern -Review of State or Nationally-Normed Assessments -Observation	Special Education Teacher(s)  and/or  School Psychologist		Look for 5 <sup>th</sup> percentile or below on assessments
Scientific Research-Based Interventions	-Review of Scientific, Research-Based Intervention History: Problem-Solving	Special Education Teacher		Need to include Level of Achievement and Rate of Progress
Health/Physical Status	-Health/Physical Assessment [if needed]	School Nurse		
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

<b>Specific Learning Disability (SLD) – Discrepancy Model (North Branch Only)</b>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	[Cognitive Testing, choose one: -Woodcock-Johnson Tests of Cognitive Abilities – Third Edition; -Wechsler Intelligence Scale for Children – Fourth Edition, File Review of Previous Cognitive Testing, other] -Information Processing Interviews: Teacher(s)/Parent(s)/Student [if secondary level]	School Psychologist  Special Education Teacher		
Academic Achievement	-Curriculum-Based Measurement at Current Grade Level in Academic Area(s) of Concern -Woodcock-Johnson Tests of Achievement – Third Edition– Extended Battery -Observation	Special Education Teacher		
Health/Physical Status	-Health/Physical Assessment [if needed]	School Nurse		
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

**Emotional Behavioral Disorder (EBD) K-12****Must Assess or Address the Following:**

<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	-The Woodcock-Johnson Tests of Cognitive Abilities-Third Edition- Brief will be administered. If those test results are not valid, the full test battery will be administered. [OR] -File Review of Previous Cognitive Testing	School Psychologist		Check with school psychologist before adding to eval plan to determine what is needed.
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		
Health/Physical Status	-Health/Physical Assessment	School Nurse		Required for initials, team decision for reevals
Social/Emotional/ Behavioral Functioning	-Behavioral Assessment System for Children – Second Edition: Parent(s)/Teacher(s)/Student [if appropriate age and/or cognitive ability] -Mental Health Screening -Functional Behavior Assessment, including Parent/Teacher/Student Interviews [if appropriate age and/or cognitive ability] and 3 systematic observations	School Psychologist  and/or  Special Education Teacher		Include multiple raters and settings (home, gen ed, Special Education, Kid’s Club, specialists).  Try to address impairment in at least 3 different settings, 2 of which are educational
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

**Emotional Behavioral Disorder (EBD) Pre-K/ECSE****Must Assess or Address the Following:**

<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review -Case History, including medical, cultural, and developmental information	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	- The Woodcock-Johnson Tests of Cognitive Abilities-Third Edition- Brief will be administered. If those test results are not valid, the full test battery will be administered. [OR] -Wechsler Preschool and Primary Scale of Intelligence – Third Edition [OR] -File Review of Previous Cognitive Testing	School Psychologist		Check with school psychologist before adding to eval plan to determine what is needed.
Academic Achievement	-Individual Growth and Development Indicators -[Any applicable CBMs]	Special Education Teacher		See school psychologist for guidance.
Health/Physical Status	-Health/Physical Assessment	School Nurse		Required for initials, team decision for reevals
Social/Emotional/ Behavioral Functioning	-At least 2 systematic observations (including 1 in the home) -Interviews (both standardized and informal): Parent(s)/Teacher(s)/Caregiver(s)/ Childcare. [For standardized interview, use: Behavioral Assessment System for Children – Second Edition OR Social Skills Improvement System]	School Psychologist  and/or Special Education Teacher		Include multiple raters and settings (home, school, childcare, etc.).  Needs to occur in at least 1 setting (home, childcare, community).
Adaptive/Functional Behavior	-Adaptive Behavior Assessment System –Second Edition	School Psychologist		
Assistive Technology	-AT Consideration	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

<b>Other Health Disabilities</b>				
<i>Physical Medical Consulting Teacher must be involved in the creation of each non-ADHD OHD evaluation plan! Each case will require different assessment tools because they are so unique.</i>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		
Health/Physical Status	-Health/Physical Assessment -Medical Documentation of Diagnosis [For ADHD: “including documentation of DSM-IV Criteria from doctor”]	School Nurse		-Required for initials, team decision for reevals. -Need Medical Documentation of Diagnosis/Disability dated within 12 months for initial evaluation.
Adaptive/ Functional Behavior	-Systematic Parent Interview(s) -Student Interview [if appropriate age and/or cognitive ability] -Systematic Teacher Interview(s) using the Organizational and Independent Work Skills Checklist -Systematic Observation in a Learning Environment (at least one using the OHD Systematic Observation Rating Form) [[Also for ADHD:] -Momentary Time Sampling Observations]	Special Education Teacher		-Give Organizational and Independent Work Skills Checklist to multiple teachers/ specialists to get consistency across settings. (Optional for parents.)  -School Psychologist can complete the student interview, but not the others.
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			For example, the Behavioral Assessment System for Children - Second Edition (BASC-2) for students with significant behavior or mental health concerns.
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

**Autism Spectrum Disorder (ASD)**

*Depending on the student, a collaborative planner may or may not need to be involved in the evaluation.  
Please see school psychologist for clarification.*

**Must Assess or Address the Following:**

Area	Materials & Procedures	Evaluators	Date	Other Information:
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	[Optional: Cognitive Testing]	School Psychologist		Not required - team decision. Can also do file review. See school psychologist for guidance.
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		To address ASD criteria, two or more of the following are needed: structured interview with parents, autism rating scales or checklists, communication and developmental scales, functional behavior evaluation, application of DSM-IV diagnostic criteria, informal and standardized evaluation instruments, and intellectual testing. The CBMs and WJ would count as the “informal and standardized evaluation instruments.” It is recommended that these academic measures be administered if a student is suspected of needing or is currently receiving academic services.
Health/Physical Status	-Health/Physical Assessment [if needed]	School Nurse		
Social/Emotional/ Behavioral Functioning	-Teacher Interview(s) and Student Interview [if appropriate age and/or cognitive ability] -Parent Interview including [a review of] Developmental History and Behavior Patterns -Gilliam Autism Rating Scale – Second Edition [for low functioning students] [OR] -Gilliam Asperger’s Disorder Scale [for higher functioning students] -Autism Diagnostic Observation Schedule -ASD Observations (at least 2) [Optional: -Informal Academic Skills and Social Emotional Checklists]	School Psychologist  and/or  Autism Specialist/Behavior Analyst  and/or  Low Incidence Collaborative Planner		Devel. History required on Initial, can review for reevals, but still conduct an interview  Observations: 2 different settings on 2 different days  ADOS- Only for initial evaluations
Adaptive/Functional Behavior	[Optional: -Adaptive Measure: Adaptive Behavior Assessment System – Second Edition: Parent(s)/Teacher(s) [OR] -Scales of Independent Behavior – Revised: (Parent(s)/Teacher(s)]	School Psychologist		Mainly for lower functioning students with adaptive behavior concerns
Communication/ Speech Language	[Optional: -Test of Pragmatic Language -Speech/Language Sample, etc.]	Educational Speech/Language Pathologist		[Not required, but often necessary. Must consider for eval.]
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) -Info from parent(s)/teacher(s)/student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			For example, the BASC for students with behavior/mental health concerns.
	Any related services assessments as needed (i.e., OT, PT, DAPE)			

<b>Developmental Cognitive Delay (DCD)</b>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	-[List specific cognitive test] [OR] -File Review of Previous Cognitive Testing	School Psychologist		Administer or file review - team decision. Recommended to do at least 2 tests with consistent scores before review.
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		To address DCD criteria B, one or more of the following needs to be completed: supplemental tests of specific abilities, alternative methods of intellectual assessment, observation and analysis of behavior across multiple environments, criterion-referenced tests, or clinical interviews with family members. The WJ would count as “supplemental tests of specific abilities.”
Health/Physical Status	-Health/Physical Assessment	School Nurse		Required for initials, team decision for reevals
Adaptive/Functional Behavior	-Adaptive Measure: Adaptive Behavior Assessment System – Second Edition: Parent(s)/Teacher(s) [OR] -Scales of Independent Behavior – Revised: Parent(s)/Teacher(s) -Systematic DCD Observations (at least 2) -Interviews: Parent(s)/Teacher(s)/Student [if appropriate age and/or cognitive ability]	Special Education Teacher  and/or  School Psychologist		
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			



<b>Traumatic Brain Injury (TBI)</b>				
<i>Physical Medical Consulting Teacher must be involved in the creation of each TBI evaluation plan. Each case will require different assessment tools because they are so unique.</i>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review -Review of Neuropsychological Evaluation (if available)	Special Education Teacher and/or School Psychologist		See ESR Checklist for specifics
Intellectual Functioning	[Optional: Cognitive Testing]	School Psychologist		Not required - team decision. Can be administered or file review.
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		Not required - team decision if there are academic concerns. File review ONLY if the case manager has reason to believe that the previous scores were valid and generally unchanged; however, these scores should NOT be stable over time. See school psychologist for guidance.
Health/Physical Status	-Health/Physical Assessment including documentation of medically verified TBI	School Nurse		Required for initials, team decision for reevals.
Adaptive/Functional Behavior	-Parent/Teacher Interview -TBI Checklists: Teacher(s)/Parent(s) -Systematic Observation	TBI Consultant  and/or  School Psychologist		
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

<b>Physically Impaired (PI)</b>				
<i>Physical Medical Consulting Teacher must be involved in the creation of each PI evaluation plan. Each case will require different assessment tools because they are so unique.</i>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas -Woodcock-Johnson Tests of Achievement – Third Edition	Special Education Teacher		Not required - team decision if there are academic concerns. File review ONLY if the case manager has reason to believe that the previous scores were valid and generally unchanged; however, these scores should NOT be stable over time. See school psychologist for guidance.
Health/Physical Status	-Health/Physical Assessment including documentation of medically diagnosed physical impairment	School Nurse		Required for initials, team decision for reevals.
Adaptive/ Functional Behavior	-Systematic Observations (at least 2 in daily routine settings) -Interviews: Parent(s)/Teacher(s)/ Student [if appropriate age and/or cognitive ability] [-Other appropriate checklists. For example, Organization and Independent Work Skills Checklist]	Special Education Teacher  and/or  School Psychologist		
Assistive Technology	-AT Consideration	Special Education Teacher		
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

<b>Severely Multiply Impaired (SMI)</b>				
<b><i>Must contact all appropriate related service personnel for evaluation planning. Student must meet criteria in 2 of the following eligibility categories to qualify under SMI: deaf and hard of hearing, physically impaired, developmental cognitive delay: severe profound, visually impaired, emotional behavioral disorders, and autism spectrum disorders.</i></b>				
<b>Must Assess or Address the Following:</b>				
<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Academic Achievement	-Curriculum-Based Measurement in all Academic Areas	Special Education Teacher		
Health/Physical Status	-Health/Physical Assessment	School Nurse		Required for initials, team decision for reevals
Assistive Technology	-AT Consideration	Special Education Teacher		
	Any tools needed for each separate category.			
	Other assessments to be determined by the team.			
Post Secondary Transition	If student is of transition age: -2 Transition Assessment Tools (1 formal and 1 informal) & info from parent(s), teacher(s), & student	Special Education Teacher		
	Any other assessment tools the team thinks are necessary			
	Any related services assessments as needed (i.e., speech, OT, PT, DAPE)			

**ECSE: Developmental Delay****Must Assess or Address the Following:**

<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluators (only list title)</b>	<b>Date</b>	<b>Other Information:</b>
Background Information	-File Review	Special Education Teacher		See ESR Checklist for specifics
Intellectual Functioning	-Battelle Developmental Inventory – Second Edition [OR] -Learning Accomplishment Profile-Diagnostic -Hawaii Early Learning Profile Checklist	Special Education Teacher		
Academic Achievement	-Individual Growth and Development Indicators [if applicable] [-Any applicable CBMs]	Special Education Teacher		See school psychologist for guidance as necessary.
Health/Physical Status	-Health/Physical Assessment	School Nurse		Required for initials, team decision for reevals
Social/Emotional/ Behavioral Functioning	[-Battelle Developmental Inventory – Second Edition] -Hawaii Early Learning Profile Checklist	Special Education Teacher		
Adaptive/Functional Behavior	[-Battelle Developmental Inventory – Second Edition] -Hawaii Early Learning Profile Checklist -At least 1 systematic observation in the child's routine setting	Special Education Teacher and/or School Psychologist and/or Educational Speech/Language Pathologist		<i>Must be done on different days.</i> HELP satisfies the need for at least 1 other in each area of delay conducted on a different day (e.g., criterion-referenced instruments, language samples, or CBMs).
Communication/Speech Language	-Battelle Developmental Inventory – Second Edition [OR] -Learning Accomplishment Profile-Diagnostic -Hawaii Early Learning Profile Checklist	Special Education Teacher		
Assistive Technology	-AT Consideration	Special Education Teacher		
Motor Skills	-Battelle Developmental Inventory – Second Edition [OR] -Learning Accomplishment Profile-Diagnostic -Hawaii Early Learning Profile Checklist	Special Education Teacher		
	Any other assessment tools/ related services assessments as needed (i.e., speech, OT, PT, DAPE)			

Key to connect ESR areas to IFSP areas:

- i. Intellectual Functioning: *Cognition*
- ii. Academic Achievement
- iii. Health/Physical Status: *Physical Development, including vision and hearing*
- iv. Social/Emotional/Behavioral Functioning: *Social Emotional*
- v. Adaptive/Functional Behavior: *Adaptive*
- vi. Communication/Speech Language: *Communication*
- vii. Assistive Technology
- viii. Sensory Status: *Physical Development, including vision and hearing*
- ix. Motor Skills: *Physical Development, including vision and hearing*