

# Evaluation Planning Guide

## KEY

- **[Brackets]**
- Grey Highlight
- Purple Highlight
- (Parentheses)

**[Brackets and grey highlights]** in this guide help to identify information that needs further guidance. No brackets/ grey highlights SHOULD be presented in your final evaluation plan.

When completing a re-evaluation, consult with your evaluation team to determine the need to re-administer norm referenced assessments. **Purple highlights** in this guide help to identify norm-referenced assessments and assessments tools that may not be needed for re-evaluation

*(Parentheses indicate information that can be left in the final evaluation plan)*

## Disability Category Templates

Click on the tabs below to bring you to each template

- [Specific Learning Disability \(SLD\) SRBI Model](#)
- [Specific Learning Disability \(SLD\) Discrepancy Model](#)
- [Emotional Behavioral Disorder \(EBD\) K-12 Emotional Behavioral Disorder](#)
- [\(EBD\) Pre-K/ECSE](#)
- [Other Health Disabilities \(OHD\)](#)
- [Autism Spectrum Disorder \(ASD\)](#)
- [Developmental Cognitive Disability \(DCD\)](#)
- [Traumatic Brain Injury \(TBI\)](#)
- [Physically Impaired \(PI\)](#)
- [ECSE: Developmental Delay](#)
- [Speech/Language Impaired](#)
- [Severely Multiply Impaired \(SMI\)](#)



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## Creating Individualized & Student-Centered Evaluation Plans

## Use Evaluation Planning Guide Templates to develop SpEd Forms Evaluation Plan.

- Fill in information for primary disability category.
- If student has secondary disability identified, add any additional tools/assessments listed in the Evaluation Planning Guide for that category.
- A multidisciplinary team is needed for all evaluations. Assure that appropriate members are included and involved in the evaluation process (e.g., nurse reviews medical records, school psychologist conducts observation, related service providers)
- Consider Individual student's unique needs and make sure you are evaluating in all areas of concern/need, even if the areas of concern/need are not commonly linked with the student's disability.

## Review Previous Evaluations

- Questions to Consider
  - Were other tools *in addition to what is listed in Evaluation Planning Guide* completed?
  - What was the outcome? For instance, if it was determined that there were no needs in that area, it may not be appropriate to evaluate in that area again.
- We cannot assume that all the same tools/assessments that were completed 3 years ago should be done again. Student's needs may have changed.

## Review academic, behavioral, and functional data.

- What are academic areas of need/concern? What is the best way(s) to assess them?
- What are behavioral areas of need/concern? What is the best way(s) to assess them?
- What are functional areas of need/concern? What is the best way(s) to assess them?

## Connect with other service providers.

- Have other service providers add the tools/assessments needed to evaluate in their area of expertise. Provide at least a week notice for service providers to add their assessments.
- If you are unsure whether a service provider needs to be included (i.e., nurse), connect with them to see what information they need to make this determination.

## Obtain input from other staff.

- Teachers, Paraprofessionals, and other Staff members may have great insights into student needs that can inform the evaluation plan.
- Gather input on areas of concern
  - How are identified behavioral strategies working with the student?
  - What are specific behaviors of concern?
  - Any other concerns?

## Match evaluation tools to the team's questions.



- What does the team need to understand better? What areas does the team want to check on progress/status? What tools are going to give the team the info need for the evaluation?
- Examples
  - If attendance has been an issue and the team wants to rule out health issues as a contributing factor, a health assessment by the nurse may be warranted.
  - If the student is often off-task in classes, momentary time sampling observations may help us determine to what degree this is interfering with the student's learning.
  - If the student is demonstrating difficulty with functional/adaptive skills, completion of an adaptive rating scale may be warranted.

## Connect with your school psychologist.

- Share all evaluation plans with your school psychologist prior to sending the plan home. Please provide at least a week for review and consultation.

## Considerations for Re-Evaluating a Student for Special Education

### Primary questions the IEP team is answering when completing a re-evaluation:

- What progress has the student made, compared to peers or the expected standard, since the last evaluation?
- What discrepancy, if any, still exists between the student's performance and that of peers or the expected standard?
- What evidence is there that the student continues to need special education and related services in order to be successful?
- What additions or modifications to the special education and related services are needed to enable the student to meet the IEP goals and to participate, as appropriate, in the general education curriculum?
- Does the student continue to be eligible for special education services, based on the information contained in the previous four questions?
- Under what conditions will the IEP team consider exiting the student from special education services?

### Observations and Interview

- Observations and interviews should always be included in a re-evaluation plan.



## Consult with your evaluation team to determine the need to re-administer norm-referenced assessments:

- Cognitive assessments (e.g., WJ-IV-Cog, WISC-V, KABC-2)
- Achievement assessments (e.g., WJ-IV-Ach, KTEA-3).
  - These assessments are not required for re-evaluations if the team has existing, objective academic achievement data (i.e., MAP, MCA, GOMs) that is valid and reliable.
- Social-emotional rating scales (e.g., BASC-3, GARS-3)
- Adaptive-functional rating scales (e.g., ABAS-3, Vineland-3)
- Norm-referenced assessment instruments are often needed to establish initial eligibility; however, they are not always needed to establish a continuing need for services and to identify a student's educational needs and present levels of performance.
  - In many cases, high-quality progress monitoring data collected according to a student's IEP---when supplemented by observations and interviews---can provide the IEP team with adequate data to make these determinations.

## A Note on the Value of Comprehensive Evaluations

- Schools are required by law to complete Evaluation Summary Reports
  - Evaluation Summary Reports (ESR) is a shortened summary of the comprehensive evaluation report; This is usually found at the beginning of the evaluation report.
  - Make this summary as useful as possible by providing meaningful information
- It is crucial to think **critically, creatively, and outside the box!** All this will make evaluations more meaningful and comprehensive- allowing evaluation teams to maximize the positive impact on students!

## Specific Learning Disability (SLD) SRBI Model

A multidisciplinary team is needed for all evaluations. Therefore someone other than a sped teacher must be involved in the evaluation process



**Must Assess or Address the Following**

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	- File Review	Special Education Teacher	- See ESR Checklist for specifics.
Intellectual Functioning	- Information Processing Interview Teacher(s)/ Parent(s)/ Student [if secondary level]	Special Education Teacher	
Academic Achievement	<ul style="list-style-type: none"> <li>- Administer/Review Curriculum Based Measures (at current grade level in all academic areas)</li> <li>- Review of State or Nationally Normed Assessments</li> <li>- Observation (in area(s) of need)</li> <li>- <b>Woodcock-Johnson Test of Achievement- Fourth Edition</b> (only [list cluster, example: Basic Reading Skills] cluster)</li> </ul>	Special Education Teacher [AND/OR] School Psychologist	<ul style="list-style-type: none"> <li>- Review CBM areas of no current concern. Administer CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing.</li> <li>- Choose specific subtests for the WJ-ACH to administer to get a cluster score.</li> <li>↳ <b>Basic Reading</b>: Letter-Word Identification and Word Attack</li> <li>↳ <b>Reading Fluency</b>: Oral Reading and Sentence Reading Fluency</li> <li>↳ <b>Reading Comp</b>: Passage Comprehension and Reading Recall</li> <li>↳ <b>Mathematics Calculation</b>: Calculation and Math Facts Fluency</li> <li>↳ <b>Mathematics Problem Solving</b>: Applied Problems and Number Matrices</li> <li>↳ <b>Written Expression</b>: Writing Samples and Sentence Writing Fluency</li> <li>- To be compliant, do at least one observation in the area of concern (reading, math, etc.) &amp; document behaviors and relationship to learning. <b>MTS does not count for this.</b></li> </ul>
Scientific Research-Based (SRBI) Interventions	- Review of Scientific, Research-Based Intervention History; Problem-Solving	Special Education Teacher [AND/OR] School Psychologist	<ul style="list-style-type: none"> <li>- Need to include level of achievement and rate of progress.</li> <li>- Select the evaluator based on who is most involved in the problem-solving process</li> </ul>
Health/Physical Status	- <b>Health/Physical Assessment</b>	School Nurse	<ul style="list-style-type: none"> <li>- Required for initials; team decision for re-evals</li> </ul>
Assistive Technology	- Assistive Technology Consideration	Special Education Teacher	
Post Secondary Transition	<ul style="list-style-type: none"> <li>- [ if student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>- For TRAX, gather information from student, parent(s), &amp; teacher(s).</li> </ul>
	- [Any other assessment tools the team thinks are necessary]		
	-[Any Related Services Assessments as needed (ie: speech, OT, PT DAPE) List these assessments tools before AT on the Evaluation Plan]		



## Specific Learning Disability (SLD) Discrepancy Model

Only to be used in extenuating circumstances

### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
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Background Information	- File Review	Special Education Teacher	See ESR Checklist for specifics.
Intellectual Functioning	<ul style="list-style-type: none"> <li>- [Cognitive Testing, Chose one:]</li> <li>- Woodcock-Johnson Tests of Cognitive Abilities- Fourth Edition</li> <li>[OR]</li> <li>- Wechsler Intelligence Scale for Children- Fifth Edition</li> <li>[OR]</li> <li>- File Review of Previous Cognitive Testing</li> <li>[OR]</li> <li>- [Select Another Assessment Tool]</li> <li>- Information Processing Interviews: Teacher(s)/Parent(s)/Student [If secondary level]</li> </ul>	<p>School Psychologist</p> <p>Special Education Teacher</p>	
Academic Achievement	<ul style="list-style-type: none"> <li>- Administer/Review Curriculum Based Measures (at current grade level in all academic areas)</li> <li>- <b>Woodcock-Johnson Test of Achievement, Fourth Edition-Extended Battery</b></li> <li>- Observation</li> </ul>	Special Education Teacher	-Review CBM areas of no current concern. Administer CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing
Health/Physical Status	- <b>Health/Physical Assessment</b>	School Nurse	-Required for initials; team decision for re-evals
Assistive Technology	- Assistive Technology Consideration	Special Education Teacher	
Post Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	-For TRAX, gather information from student, parent(s), & teacher(s).
	- [Any other assessment tools the team thinks are necessary]		
	- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]		



## Emotional Behavioral Disorder (EBD) K-12

### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	- File Review	Special Education Teacher	See ESR Checklist for specifics.

Intellectual Functioning	<ul style="list-style-type: none"> <li>- Woodcock-Johnson Tests of Cognitive Abilities- Fourth Edition- Brief will be administered. If those test results are not valid, the full test battery will be administered [OR]</li> <li>- Wechsler Intelligence Scale for Children- Fifth Edition [OR]</li> <li>- [Select Another Assessment Tool]</li> <li>- File Review of Previous Cognitive Testing</li> </ul>	School Psychologist	<ul style="list-style-type: none"> <li>- Check with school psychologist before adding to evaluation plan to determine what is needed.</li> <li>- Cognitive assessments are included in initial EBD evaluations to rule out cognitive factors. It may not be necessary to review this data when completing a re-evaluation. If not including a file review, include a statement in the ESR regarding how criteria was initially addressed</li> </ul>
Academic Achievement	<ul style="list-style-type: none"> <li>- Administer/Review Curriculum Based Measures (at current grade level in all academic areas)</li> <li>- Woodcock-Johnson Test of Achievement- Fourth Edition-Extended Battery</li> <li>- Observation</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>- Only include CBM if there is an academic area of concern.</li> <li>- If including CBM, administer new CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing.</li> </ul>
Health/Physical Status	- Health/Physical Assessment	School Nurse	<ul style="list-style-type: none"> <li>- Required for initials; team decision for re-evals</li> </ul>
Social/Emotional/Behavioral Functioning	<ul style="list-style-type: none"> <li>- Behavior Assessment System for Children- Third Edition (BASC): Parent(s)/Teacher(s)/Student [If age appropriate] (Mental Health Screening)</li> <li>- Functional Behavior Assessments Including Parent/Teacher/Student Interviews and 3 Systematic Observations</li> </ul>	<p>School Psychologist</p> <p>Special Education Teacher</p>	<ul style="list-style-type: none"> <li>Include multiple raters and settings (e.g., home, general education, special education, Kids Club, specialists).</li> <li>-Identify specific community members (e.g., county case worker, liaison officer, TSA therapist) if obtaining data from them via interviews or BASC-3.</li> <li>-Must address impairment in at least 3 different settings, 2 of which are educational.</li> <li>-FBA should be a collaborative effort between at least 2 people. --Consider whether a services coordinator should be involved with the FBA. If so, list title under the Evaluator section</li> </ul>
Assistive Technology	- Assistive Technology Consideration	Special Education Teacher	
Post Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>-For TRAX, gather information from student, parent(s), &amp; teacher(s).</li> </ul>
	- [Any other assessment tools the team thinks are necessary]		
	- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]		

Emotional Behavioral Disorder (EBD) Pre-K/ECSE			
Must Assess or Address the Following			
Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> <li>- Case History, including medical, cultural, and developmental information</li> </ul>	Special Education Teacher	See ESR Checklist for specifics.

Intellectual Functioning	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory- Second Edition</li> <li>[OR] <ul style="list-style-type: none"> <li>- Learning Accomplishment Profile- Diagnostic</li> <li>[OR] <ul style="list-style-type: none"> <li>- <b>Woodcock-Johnson Tests of Cognitive Abilities- Fourth Edition</b>: Brief will be administered. If those test results are not valid, the full test battery will be administered</li> </ul> </li> <li>[OR] <ul style="list-style-type: none"> <li>- Kaufman Assessment Battery for Children- Second Edition</li> </ul> </li> <li>[OR] <ul style="list-style-type: none"> <li>- <b>File Review of Previous Cognitive Testing</b></li> </ul> </li> </ul> </li> </ul>	<p>School Psychologist</p> <p>[AND/OR]</p> <p>Special Education Teacher</p>	<ul style="list-style-type: none"> <li>- Check with school psychologist before adding to evaluation plan to determine what is needed.</li> <li>- <b>Reevaluations: BDI-2 is not required if team has existing, objective academic data (i.e., aFAST, GOMs) or data in other area of need (i.e., BASC-3 or SAEPRS for social/emotional) that are valid and reliable</b></li> </ul>
Academic Achievement	<ul style="list-style-type: none"> <li>- Administer/Review Curriculum Based Measures (at current grade level in all academic areas)</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>- For ages 3 to 6, include: Picture Naming, Rhyming, Alliteration, Letter Sounds, Letter Naming, Quantity Comparison, Oral Counting, One to One Correspondence, and Number Naming</li> </ul>
Health/Physical Status	<ul style="list-style-type: none"> <li>- <b>Health/Physical Assessment</b></li> </ul>	School Nurse	<ul style="list-style-type: none"> <li>- Required for initials; team decision for re-evals</li> </ul>
Social/Emotional/Behavioral Functioning	<ul style="list-style-type: none"> <li>- Systematic Observations (at least 2, including 1 home)</li> <li>- Interviews (both standard and informal): Parent(s)/Teacher(s)/Careiver(s)/Childcare, including [For standardized interview, use:] <b>Behavior Assessment System for Children- Third Edition</b> [OR] <b>Social Skills Improvement System</b></li> </ul>	<p>School Psychologist</p> <p>Special Education Teacher</p>	<ul style="list-style-type: none"> <li>- Include multiple raters and settings (e.g., home, general education, special education, Kids Club, specialists).</li> <li>- Identify specific community members (e.g., county case worker, liaison officer, TSA therapist) if obtaining data from them via interviews or BASC-3.</li> <li>- Must address impairment in at least 3 different settings, 2 of which are educational.</li> <li>- FBA should be a collaborative effort between at least 2 people. --Consider whether a services coordinator should be involved with the FBA. If so, list title under the Evaluator section</li> </ul>
Adaptive/Functional Behavior	<p><b>Behavior Assessment System for Children – Third Edition</b></p> <ul style="list-style-type: none"> <li>-</li> </ul>	School Psychologist	
Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> <li>- [Any other assessment tools the team thinks are necessary]</li> </ul>	Special Education Teacher	
	<ul style="list-style-type: none"> <li>- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</li> </ul>		



## Other Health Disabilities (OHD)

The OHD Consultant 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. \*A multidisciplinary team is needed for all evaluations. Therefore, someone other than a SPED teacher must be involved in evaluation (e.g., nurse conducts health/physical assessment, school psychologist conducts observation)

### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>- See ESR Checklist for specifics.</li> </ul>
Intellectual Functioning	<ul style="list-style-type: none"> <li>- [Optional: List specific cognitive test]</li> <li>- <b>Behavior Rating Inventory of Executive Functioning- Second Edition</b></li> </ul>	School Psychologist	<ul style="list-style-type: none"> <li>- Not required – team decision. Can also do file review. See school psychologist for guidance</li> </ul>

Academic Achievement	<ul style="list-style-type: none"> <li>- Administration/Review Curriculum Based Measures (at current grade level in all academic areas)</li> <li>- <b>Woodcock-Johnson Tests of Achievement- Fourth Edition</b></li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>-Only include CBM if there is an academic area of concern.</li> <li>-If including CBM, administer new CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing</li> </ul>
Health/Physical Status	<ul style="list-style-type: none"> <li>- <b>Health/Physical Assessment (With Medical Documentation for Diagnosis)</b></li> <li>- <b>[For ADHD] Health/Physical Assessment (with Medical Documentation of Diagnosis, including documentation of DSM-IV or V Criteria)</b></li> </ul>	School Nurse	<ul style="list-style-type: none"> <li>Health/Physical Assessment required for initials; team decision for re-evals.</li> <li><b>-For re-evals, if team decides not to conduct a new health/physical assessment, include summary of initial health/physical assessment in Background Information section.</b></li> <li>-Need Medical Documentation of Diagnosis/Disability dated within 12 months for initial evaluation</li> </ul>
Social/Emotional/Behavioral Functioning	<ul style="list-style-type: none"> <li>- <b>[If student has mental health/behavioral concerns, consider adding additional assessment tools]</b></li> <li>- <b>Behavioral Assessment System for Children- Third Edition [Optional]</b></li> <li>- Functional Behavioral Assessment, including Parent/Teacher/Student Interviews and 3 systematic observations <b>[Optional]</b></li> </ul>	<p>School Psychologist</p> <p>Special Education Teacher</p>	<p>Not required, but often necessary based on student's needs. Consult with your school psychologist.</p>
Adaptive/Functional Behavior	<ul style="list-style-type: none"> <li>- Systematic Interview(s): Parent/Student <b>[if student is appropriate age/cognitive ability]</b></li> <li>- Systematic Teacher Interview(s): Organizational and Independent Work/Motor Skills Checklist</li> <li>- Systematic Observation (in a learning environment, at least one using the Other Health Disabilities Systematic Observation Rating Form)</li> <li>- <b>[For ADHD] Momentary Time Sampling</b></li> </ul>	Special Education Teacher	
Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> </ul>	Special Education Teacher	
Post Secondary Transition	<ul style="list-style-type: none"> <li>- <b>If student is of transition age, include 2 transition assessment tools:]</b></li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- <b>[Select an additional transition tool]</b></li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>-For TRAX, gather information from student, parent(s), &amp; teacher(s).</li> </ul>
	<ul style="list-style-type: none"> <li>- <b>[Any other assessment tools the team thinks are necessary]</b></li> </ul>		
	<ul style="list-style-type: none"> <li>- <b>[ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</b></li> </ul>		

## Autism Spectrum Disorder (ASD)

Depending on the student, a service coordinator may or may not be needed to be involved in the evaluation. Please see school psychologist for clarification.



### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>See ESR Checklist for specifics.</li> </ul>
Intellectual Functioning	<ul style="list-style-type: none"> <li>- <b>[Optional: List specific cognitive test]</b></li> <li>- <b>Behavior Rating Inventory of Executive Functioning- Second Edition</b></li> </ul>	School Psychologist	<ul style="list-style-type: none"> <li>- Not required – team decision. Can also do file review. See school psychologist for guidance</li> </ul>
Academic Achievement	<ul style="list-style-type: none"> <li>- Administration/Review Curriculum Based Measures (at current grade level in all academic areas)</li> <li>- <b>Woodcock-Johnson Tests of Achievement- Fourth Edition</b></li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>-Only include CBM if there is an academic area of concern.</li> <li>-If including CBM, administer new CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing</li> </ul>

Health/ Physical Status	<ul style="list-style-type: none"> <li>- Health/Physical Assessment (With Medical Documentation for Diagnosis)</li> <li>- [For ADHD] Health/Physical Assessment (with Medical Documentation of Diagnosis, including documentation of DSM-IV or V Criteria)</li> </ul>	School Nurse	<p>Health/Physical Assessment required for initials; team decision for re-evals.</p> <p>-For re-evals, if team decides not to conduct a new health/physical assessment, include summary of initial health/physical assessment in Background Information section.</p> <p>-Need Medical Documentation of Diagnosis/Disability dated within 12 months for initial evaluation</p>
Social/ Emotional/ Behavioral Functioning	<ul style="list-style-type: none"> <li>- [If student has mental health/behavioral concerns, consider adding additional assessment tools]</li> <li>- Behavioral Assessment System for Children- Third Edition [Optional]</li> <li>- Functional Behavioral Assessment, including Parent/Teacher/Student Interviews and 3 systematic observations [Optional]</li> </ul>	<p>School Psychologist</p> <p>Special Education Teacher</p>	<p>Not required, but often necessary based on student's needs. Consult with your school psychologist.</p>
Adaptive /Functional Behavior	<ul style="list-style-type: none"> <li>- Systematic Interview(s): Parent/Student [if student is appropriate age/cognitive ability]</li> <li>- Systematic Teacher Interview(s): Organizational and Independent Work/Motor Skills Checklist</li> <li>- Systematic Observation (in a learning environment, at least one using the Other Health Disabilities Systematic Observation Rating Form)</li> <li>- [For ADHD] Momentary Time Sampling</li> </ul>	Special Education Teacher	
Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> </ul>	Special Education Teacher	
Post Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	<p>-For TRAX, gather information from student, parent(s), &amp; teacher(s).</p>
	<ul style="list-style-type: none"> <li>- [Any other assessment tools the team thinks are necessary]</li> </ul>		
	<ul style="list-style-type: none"> <li>- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</li> </ul>		

## Developmental Cognitive Disability (DCD)



### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> </ul>	Special Education Teacher	<p>See ESR Checklist for specifics.</p>
Intellectual Functioning	<ul style="list-style-type: none"> <li>- List specific cognitive test]</li> <li>[OR]</li> <li>- File Review of Previous Cognitive Testing</li> </ul>	School Psychologist	<p>Administer or file review IQ- team decision. Recommended: Another IQ need not be completed in re-evaluations for students who fall in the severe-profound range. A new IQ should be given to students who fall in the mild- moderate range if: a. The only IQ was completed before age 8. b. The student's first language was not English at the time of IQ. c. The team suspects the current IQ is not consistent with initial score. d. The team questions the validity of the results in previous IQ. e. Previous report indicates "low estimate of ability" on previous IQ</p>
Academic Achievement	<ul style="list-style-type: none"> <li>- [For Higher functioning student:] Administration/Review of Curriculum-Based Measurements [If needed]</li> <li>- [For Lower Functioning Students:] Informal Curriculum-Based Assessments</li> </ul>	Special Education Teacher	<p>-Only include CBM if appropriate and if there is an academic area of concern.</p> <p>-If including CBM, administer new CBM if no current data, area of concern without a recent score from</p>

			universal screening, or out of grade level testing
Health/ Physical Status	- <b>Health/Physical Assessment</b>	School Nurse	Health/Physical Assessment required for initials; team decision for re-evals.
Adaptive/ Functional Behavior	- <b>Adaptive Behavior Assessment System- Third Education</b> (ABAS) : Parent(s)/Teacher(s) - Systematic Observations (at least two) - Interviews: Parent(s)/Teacher(s)/Student [If age appropriate and/or cognitive ability]	Special Education Teacher [AND/OR] School Psychologist	Must verify IQ through one of the following: supplemental tests of specific abilities (ABAS, communication tests, WJ Ach), or alternative methods of intellectual assessment. (nonverbal IQ tests), or observation and analysis of behavior across multiple environments (ABAS, FBA, maladaptive on SIB-R), criterion-referenced tests, (MCA, SRA, STAR, Brigance), or clinical interviews with family members (structured interview to include health/ed history). <b>Likely you will not have to add an additional assessment</b> , rather, use info you already will have (e.g., ABAS).
Assistive Technology	- Assistive Technology Consideration	Special Education Teacher	
Post Secondary Transition	- If student is of transition age, include 2 transition assessment tools: - TRAX Transition Systems from Ten Sigma - [Select an additional transition tool]	Special Education Teacher	-For TRAX, gather information from student, parent(s), & teacher(s).
	- [Any other assessment tools the team thinks are necessary]		
	- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]		



## Traumatic Brain Injury (TBI)

Physical Health Disability Consultant must be involved in the creation of each TBI evaluation plan.  
Each case will require different assessment tools because they are so unique.

### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
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: List specific cognitive test]	School Psychologist	Not required- team decision -Can be administered or file review
Academic Achievement	- Administration/Review of Curriculum-Based Measurement - <b>Woodcock-Johnson Test of Achievement- Fourth Edition</b> [If needed]	Special Education Teacher	-Only include CBM if appropriate and if there is an academic area of concern. -If including CBM, administer new CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing -Initials: WJ-IV Achievement is not required. It is a team decision.
Health/ Physical Status	- <b>Health/Physical Assessment including documentation of medically verified traumatic brain injury</b>	School Nurse	-Required for initials; team decision for re-evals. <b>-For re-evals, if team decides not to conduct a new health/physical assessment, include summary of initial health/physical assessment</b>

			<b>in Background Information section.</b>
Adaptive/ Functional Behavior	<ul style="list-style-type: none"> <li>- Interviews: Parent(s)/Teacher(s)/Student [If age appropriate and/or cognitive ability]</li> <li>- Traumatic Brain Injury Checklist:</li> <li>- Teacher(s)/Parent(s)</li> <li>- Systematic Observation</li> </ul>	Physical Health Disability Consultant [AND/OR] Special Education Teacher [AND/OR] School Psychologist	
Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> </ul>	Special Education Teacher	
Post-Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	-For TRAX, gather information from student, parent(s), & teacher(s).
	<ul style="list-style-type: none"> <li>- [Any other assessment tools the team thinks are necessary]</li> </ul>		
	<ul style="list-style-type: none"> <li>- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</li> </ul>		



## Physically Impaired (PI)

Physical Health Disability Consultant must be involved in the creation of each PI evaluation plan.  
 Each case will require different assessment tools because they are so unique.

### Must Assess or Address the Following

<b>Area</b>	<b>Materials &amp; Procedures</b>	<b>Evaluator(s) (Only list Title)</b>	<b>Other Information</b>
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> </ul>	Special Education Teacher	See ESR Checklist for specifics.
Academic Achievement	<ul style="list-style-type: none"> <li>- Administration/Review of Curriculum-Based Measurement</li> <li>- <b>Woodcock-Johnson Test of Achievement- Fourth Edition</b> [If needed]</li> </ul>	Special Education Teacher	<ul style="list-style-type: none"> <li>-Only include CBM if appropriate and if there is an academic area of concern.</li> <li>-If including CBM, administer new CBM if no current data, area of concern without a recent score from universal screening, or out of grade level testing</li> <li>-Initials: WJ-IV Achievement is not required. It is a team decision.</li> </ul>
Health/ Physical Status	<ul style="list-style-type: none"> <li>- <b>Health/Physical Assessment including documentation of medically diagnosed physical impairment</b></li> </ul>	School Nurse	<ul style="list-style-type: none"> <li>-Required for initials; team decision for re-evals.</li> <li><b>-For re-evals, if team decides not to conduct a new health/physical assessment, include summary of initial health/physical assessment in Background Information section.</b></li> </ul>

Adaptive/ Functional Behavior	<ul style="list-style-type: none"> <li>- Organizational and Independent Work Skills/Motor Skills Checklist</li> <li>- Interviews: Parent(s)/Teacher(s)/Student [If age appropriate and/or cognitive ability]</li> <li>- Systematic Observation (at least 2 in daily routine)</li> </ul>	<p>Physical Health Disability Consultant [AND/OR]</p> <p>Special Education Teacher [AND/OR]</p> <p>School Psychologist</p>	-At least one observation must be conducted by the Physical Medical Consulting Teacher.
Assistive Technology	- Assistive Technology Consideration	Special Education Teacher	
Post-Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Special Education Teacher	-For TRAX, gather information from student, parent(s), & teacher(s).
	- [Any other assessment tools the team thinks are necessary]		
	- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]		



## Early Childhood Special Education: Developmental Delay

For Birth- 2, evaluations, all areas of development must be assessed. For Evaluations for ages 3 to 6, only areas of concern need to be addressed.

### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	- File Review	Special Education Teacher	See ESR Checklist for specifics.
Intellectual Functioning	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory—Second Edition [OR]</li> <li>- Learning Accomplishment Profile-Diagnostic</li> <li>- Hawaii Early Learning Profile Checklist</li> </ul>	Special Education Teacher	<b>Reevaluations: BDI-2 is not required if team has existing, objective data in area of need (i.e., BASC-3 or SAEFRS for social/emotional) that are valid and reliable</b>
Academic Achievement	- Administration/Review of Curriculum-Based Measurement	Special Education Teacher	<ul style="list-style-type: none"> <li>-For ages 3 to 6, include: Picture Naming, Rhyming, Alliteration, Letter Sounds, Letter Naming, Quantity Comparison, Oral Counting, One to One Correspondence, and Number Naming.</li> <li>-For birth to age 2, include necessary measures based on need: Early Communication Indicator, Early Movement Indicator, Early Problem Solving Indicator, Early Social Indicator</li> </ul>
Health/ Physical Status	- Health/Physical Assessment <sup>i</sup>	School Nurse	-Required for initials; team decision for re-evals.
Social/Emotional/ Behavioral Functioning	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory—Second Edition [OR]</li> <li>- Hawaii Early Learning Profile Checklist</li> <li>- Functional Behavior Assessment, Including Parent/Teacher/Student interviews and 3 systematic observations [optional]</li> </ul>	Special Education Teacher	<b>Reevaluations: BDI-2 is not required if team has existing, objective data in area of need (i.e., BASC-3 or SAEFRS for social/emotional) that are valid and reliable.</b> <ul style="list-style-type: none"> <li>-FBA only if student has significant behaviors and a BIP is needed</li> </ul>
Adaptive/ Functional Behavior	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory—Second Edition [OR]</li> <li>- Hawaii Early Learning Profile Checklist</li> <li>- Systematic Observation (at least 1 in daily routine)</li> </ul>	<p>Physical Health Disability Consultant [AND/OR]</p> <p>Special Education Teacher [AND/OR]</p> <p>School Psychologist</p>	<b>- Reevaluations: BDI-2 is not required if team has existing, objective data in area of need (i.e., BASC-3 or SAEFRS for social/emotional) that are valid and reliable.</b>

Communication/ Speech Language	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory—Second Edition [OR]</li> <li>- Learning Accomplishment Profile-Diagnostic</li> <li>- Hawaii Early Learning Profile Checklist</li> </ul>		Reevaluations: BDI-2 is not required if team has existing, objective data in area of need (i.e., BASC-3 or SAEBRS for social/emotional) that are valid and reliable.
Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> </ul>	Special Education Teacher	
Motor Skills	<ul style="list-style-type: none"> <li>- Battelle Developmental Inventory—Second Edition [OR]</li> <li>- Learning Accomplishment Profile-Diagnostic</li> <li>- Hawaii Early Learning Profile Checklist</li> </ul>	Special Education Teacher	Reevaluations: BDI-2 is not required if team has existing, objective data in area of need (i.e., BASC-3 or SAEBRS for social/emotional) that are valid and reliable.
	<p>[ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</p>		-At least one evaluation procedure must be done on a different day than the observation (e.g., criterion-referenced tools, language samples, or GOMs)
<b>Key to connect ESR areas to IFSP areas:</b>	<ul style="list-style-type: none"> <li>- Intellectual Functioning: Cognition</li> <li>- Academic Achievement</li> <li>- Health/Physical Status: Physical Development, including vision and hearing</li> <li>- Social/Emotional/Behavioral Functioning: Social Emotional</li> <li>-</li> </ul>	<ul style="list-style-type: none"> <li>- Adaptive/Functional Behavior: Adaptive</li> <li>- Communication/Speech Language: Communication</li> <li>- Assistive Technology</li> <li>- Sensory Status: Physical Development, including vision and hearing</li> <li>- Motor Skills: Physical Development, including vision and hearing</li> </ul>	

## Speech/Language Impaired (SLI)

\* A multidisciplinary team is needed for all evaluations. Therefore, someone other than a SLP must be involved (ie: SPED teacher reviews, CBMs, nurse reviews medical records, etc)



### Must Assess or Address the Following

Area	Materials & Procedures	Evaluator(s) (Only list Title)	Other Information
Background Information	<ul style="list-style-type: none"> <li>- File Review</li> </ul>	Educational Speech Language Pathologist [AND/OR] Special Education Teacher	- See ESR Checklist for specifics (include hearing/vision, does not need separate Health/Physical section) - If there are no academic concerns, Special Education Teacher can complete the Background Information Section
Academic Achievement	<ul style="list-style-type: none"> <li>- Administration/Review of Curriculum-Based Measurement <b>[if needed]</b></li> </ul>	Special Education Teacher	- Administer/Review of CBMs by a special education teacher should be included if there are academic concerns for the student
Health/Physical Status	<ul style="list-style-type: none"> <li>- <b>Health/Physical Assessment including</b> <b>[if needed]</b></li> </ul>	School Nurse	- Required for initials; team decision for re-evals. -
Communication/ Speech/ Language	<ul style="list-style-type: none"> <li>- <b>[List Relevant Tests. Examples Below:]</b></li> <li>- <b>Clinical Evaluation of Language Fundamentals- 5<sup>th</sup> Edition</b>            [AND/OR]</li> <li>- <b>Oral and Written Language Scales- 2<sup>nd</sup> Edition</b>            [AND/OR]</li> <li>- <b>Comprehensive Assessment of Spoken Language</b>            [AND/OR]</li> <li>- Observations and Language Samples            [AND/OR]</li> <li>- <b>LinguiSystem Articulation Test</b>            [AND/OR]</li> <li>- <b>Arizona Articulation Proficiency Scale 3</b>            [AND/OR]</li> <li>- Observations and Speech Samples</li> </ul>	Educational Speech Language Pathologist	

Assistive Technology	<ul style="list-style-type: none"> <li>- Assistive Technology Consideration</li> </ul>	Educational Speech Language Pathologist	
Post-Secondary Transition	<ul style="list-style-type: none"> <li>- If student is of transition age, include 2 transition assessment tools:]</li> <li>- TRAX Transition Systems from Ten Sigma</li> <li>- [Select an additional transition tool]</li> </ul>	Educational Speech Language Pathologist	-For TRAX, gather information from student, parent(s), & teacher(s).
	<ul style="list-style-type: none"> <li>- [Any other assessment tools the team thinks are necessary]</li> </ul>		
	<ul style="list-style-type: none"> <li>- [ Any Related Services Assessments as needed (ie: Speech, OT, PT, DAPE) List these assessment tools before AT on the Evaluation Plan]</li> </ul>		



## Severely Multiply Impaired (SMI)

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, or autism spectrum disorders.

Include all relevant assessment tools based on suspected eligibility areas (for initials) or previously qualified disability categories (for re-evaluations).

