
Writing Useful, Accessible...and Legally Defensible Reports

— Jeanne Anne Carriere, PhD —

Talking Points

1. What are the purposes of psychoeducational reports?
2. What makes a report legally defensible?
3. What makes a report useful and consumer friendly?
4. How can we re-conceptualizing report writing to meet all of these needs?
5. What can I change in my report writing practices to make my reports more useful, accessible, AND defensible?

What are the purposes of our reports?

- Address the concerns & questions of parents and teachers
- Accurately document, integrate and synthesize data from a comprehensive evaluation
- Educate team members and future readers
- Forms the foundation for the IEP team's decisions about special education eligibility, educational needs, goals, services and placement
- Provides evidence of compliance with ethical and legal mandates

What Makes a Report Legally Defensible?

Ethical Guidelines	Legal Guidelines
NASP	IDEA
State Organization	State Education Codes/Regulations

What Makes a Report Legally Defensible?

What must be included in your report?

vs

What must be true about my assessment?

What must be included....	What must be true...
<ul style="list-style-type: none">❖ IDEA does NOT provide mandates for reports, except that you need to write one.❖ Check your state code, because they may have a few.	<p>IDEA Sec.300.304, <i>Evaluation Procedures</i> <i>In summary, the evaluation should...</i></p> <ul style="list-style-type: none">❖ be comprehensive❖ use a variety of evaluation tools or approaches that gather functional and relevant data❖ be fair❖ use valid and reliable tools and procedures❖ be completed by a competent evaluator

Report writing is an integral part of the evaluation, not a perfunctory task we do at the end.

Quoting the law doesn't make it true... or protect you.

“The testing and assessment materials and procedures used for this assessment were selected and administered so as not to be racially or culturally discriminatory. The tests and other assessment materials have been validated for the specific purposes for which they were used, and were administered in accordance with the instructions for the assessment materials by trained and knowledgeable personnel. The tests and other assessment material included those tailored to assess specific areas of educational need. No single procedure was used to determine eligibility for special education and/or determine appropriate educational programming.”

Demonstrating how you actually followed these mandates protects you...

“Wyatt’s overall cognitive ability was evaluated by a review of previous testing, rating scales, interviews and observations. Wyatt’s cognitive ability was evaluated three times, in 2010, 2013, and 2016 as part of Special Education evaluations. His performance on standardized measures at the subtest and scale level ranged from significantly below average to above average. Wyatt has Autism and significant delays in receptive and expressive language. Non-verbal cognitive testing was used during this assessment so that Wyatt’s deficits in verbal skills did not mask cognitive assets and deficits.

Wyatt was given the *Leiter International Performance Scale (Leiter-3)*. The Leiter-3 is a nonverbal measure of intelligence and cognitive abilities. It has a completely nonverbal format which makes it a useful tool when evaluating individuals with Autism Spectrum Disorders or Speech and Language Disorders.” (13.8 readability, 50% passive)

Demonstrating example...

“Marie’s first language was Spanish and she is an English Language Learner (ELL). Her academic instruction has been in English since kindergarten. She scored in the Intermediate level on the 2017 CELDT. Her mother reported that she speaks Spanish with her parents and English with her siblings. Marie reports she speaks English with her classmates and neighborhood friends. Both Maria and her mother think her English skills are stronger than her Spanish skills. For these reasons, Marie was interviewed in English and the tests used in this assessment were administered in English. Her cognitive abilities were assessed by tests that minimized receptive and expressive language.” *(8.5 readability, 25% passive)*

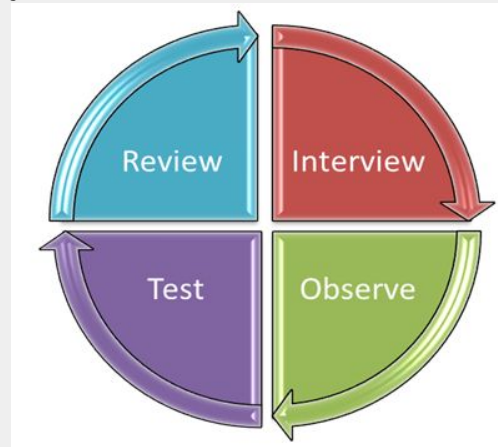
The evaluation should be comprehensive and use a variety of assessment tools that gather functional and relevant data.

Comprehensive means the following have been addressed:

- Evaluate all areas of suspected disability
 - We should have hypotheses about suspected areas of disability **BEFORE** the evaluation begins
- Evaluate all areas of related need.
 - “Related needs” versus general characteristics of the suspected disability

Comprehensive doesn't mean test everything!

Variety means different or diverse; the absence of uniformity or sameness.



R.I.O.T
Leung, 1993

Variety doesn't mean more of the same!

The evaluation should be comprehensive and use a variety of assessment tools that gather functional and relevant data.

What does *functional* mean?

- Application of learned skills (extends beyond academic achievement or skills demonstrated in scaffolded or ideal environments.)

Ask yourself, “What do they know and what can they do outside of an ideal environment?”

What does *relevant* mean?

- The information we gather is helpful in identifying educational needs and assisting those that work with the child

Ask yourself, “Will this information help the IEP team identify unique needs, write goals and/or create individualized accommodations?”

What Makes a Report Useful and Accessible?

Research Says...

Useful reports ...

- **are understandable by the consumer.**
- **clearly answer the referral questions.**
- provide clear & feasible individualized recommendations.

NASP Principles for Professional Ethics (2010)...

Reports should...

- present findings in language clearly understood by the recipients.
- emphasize interpretation and recommendations.
- support the recipients in their work or interactions with the child.

Interpretation of test data should be...

- written in simple language.
- based on convergent and comprehensive assessment sources.

Reports focused on test scores are rarely useful.

Our ethical guidelines emphasize usefulness and accessibility!

Increasing Accessibility

**If our main audience consists of teachers and parents then we
must improve *readability***

“It is my contention that any statement found in psychological reports could be made comprehensible to any literate individual of at least average intelligence” *Klopper, 1960*



“I think a psychological report can be written so most people can understand it.” *Carriere, 2010*

Flesch-Kincaid Reading Level of 17.8 to 9.2

How do I increase the readability of my reports?

Follow George Orwell's advice(Politics and the English Language , 1954)

- Never use a long word when you can use a short one instead.
- If it is possible to cut a word out, cut it out.
- Never use the passive voice where you can use the active voice.
- Never use a scientific word or jargon if you can think of an everyday English equivalent.

PLUS

- Write in a positive voice
- If you must use a “scientific word” or professional jargon, define it using simple language and give clear examples of what it means

Example: Using short words instead of long ones AND cutting words out
AND using a positive voice

- John has not experienced any accidents, injuries, illnesses or hospitalizations. (*Bad, 14.2*)
- John has not experienced any significant changes related to his health and development in recent years. (*OK, 12.0*)
- John has not had any significant changes in his health in recent years. (*Better, 6.7*)
- John is healthy. (*Best, 1.3 readability*)

Example: When you must use a technical term, provide clear behavioral examples

Technical term/jargon: Phonological awareness is the knowledge of the sound structure of the English language. It refers to an individual's awareness of the phonological structure, system or pattern of speech sounds and consists of the ability to hear and manipulate units of sound, such as onsets, rimes and syllables.
(14.4 readability)

Technical information using easily understood language and clear behavioral examples: Phonological awareness helps children learn how letters and sounds go together. This is an important skill in learning to read and write. It includes understanding that words are made up of letters that each have a sound. It also includes the ability to identify rhymes (bat/cat) and words that start or end with the same sounds (bat/ball; cat/rot), dividing words into smaller parts, such as syllables and sounds (table = ta/ble), blending separate sounds into words (b/e/d = bed), and adding, deleting, or substituting sounds in words (c/a/p – a + u = c/u/p).
(8.4 readability)

Report Writing Structures/Models

The structure you choose can make your report more or less clear and help guide the reader's thinking.

Report Writing Structures/Models

- Test-based
- Domain-based
- Referral/question based

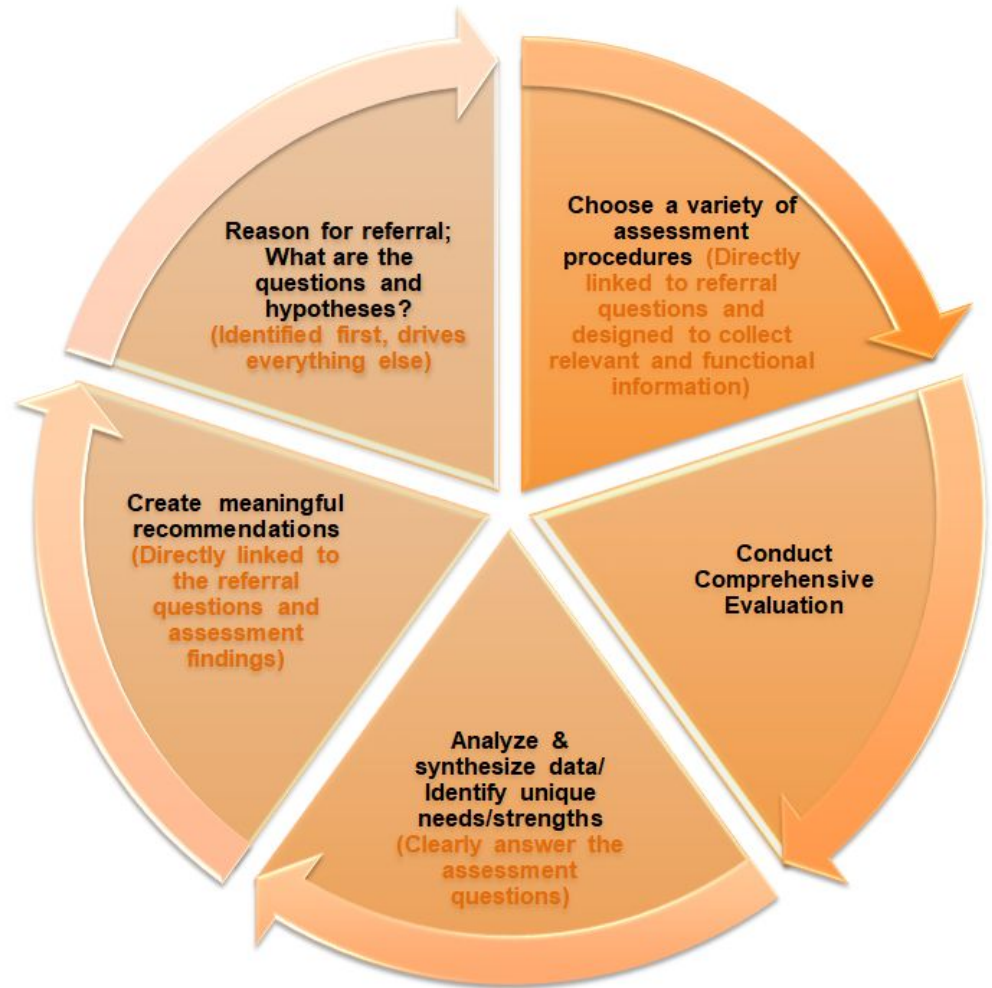
The Referral-Based Consultative Assessment Report Model

(Batsche, 1983)

- The reason for referral questions are identified through a consultative process with the referring person(s).
- The assessment plan is based on the referral questions and created in a collective process between the school psychologist, parent, teacher, and other educational professionals.
- Assessment and data collection tools are chosen to answer the specific questions.
- Assessment results are presented in the context of the referral questions.
- Recommendations flow from the referral questions and answers.

The Referral-Based/ Questions-Driven Assessment and Report

All parts of the evaluation guide
report writing and are directly
reflected in the report.



Example: Vague Reason for Referral

A psychoeducational assessment for Special Education eligibility and need was requested by the Student Success Team on 9-1-17 due to concerns with James' academic achievement. *(21.5 readability, 100% passive)*

Example: More informative Reason for Referral

James was referred for a Special Education evaluation by the Student Success Team because of concerns with his academic progress in reading and written language. Last semester, James received 90 minutes of weekly intervention from the reading specialist to improve his reading fluency and writing. His progress was limited. He is at-risk for not meeting the promotion standards for 5th grade. The focus of this evaluation is to determine if James has a learning disability and what supports he needs to make consistent progress toward grade level standards. The following questions will be addressed in this report:

1. How do health, developmental, or medical factors influence James' academic achievement and educational performance?
2. What are James' cognitive strengths and limitations? How do these impact his learning and achievement?
3. What are James' current academic skills in the areas of reading, written language and math?
4. How do James' behavior and social emotional strengths and challenges affect his academic achievement?
5. Does James have a learning disability?
6. Are changes in his educational program needed, including Special Education services, to make adequate progress in the general education curriculum?

Example: Demonstrate a variety of assessment procedures were used. These are directly linked to referral questions and chosen to collect relevant and functional information.

Review of Records

Cumulative School Records	10/18/17
Open Court Assessment Data	10/18/17, 11/6/17
Rtl Progress Monitoring Data	10/18/17, 11/6/17
Classroom Work Samples	10/18/17, 11/6/17

Interviews

James Wilson, Student	10/30/17, 11/6/17
Ms. Wilson, Mother	10/29/17
Mr. Lewis, 5th Grade Teacher	10/31/17
Ms. Intervention, Resource Specialist Program Teacher	11/1/17

Observations

Small group guided reading	10/31/17
Whole class direct math instruction	11/1/17

Standardized Assessments

Differential Ability Scales-2	11/2/17
Comprehensive Test of Phonological Processing (CTOPP)	11/2/17
Behavior Assessment System for Children-3, Parent Rating Scale	11/2/17
Behavior Assessment System for Children-3, Teacher Rating Scale	11/2/17

Integrate & Synthesize data: Evaluation Matrix

Question	Review	Interview	Observation	Testing
How do health, developmental, or medical factors influence James' academic achievement & educational performance?				
What are James' cognitive strengths and limitations? How do these impact his learning and achievement?				
What are James' current academic skills in the areas of reading, written language and math?				
How do James' behavior & social emotional strengths and challenges affect his academic achievement?				
Does James have a learning disability?				
What changes in his educational program does James need, including Special Education services, to make adequate progress in the general education curriculum?				

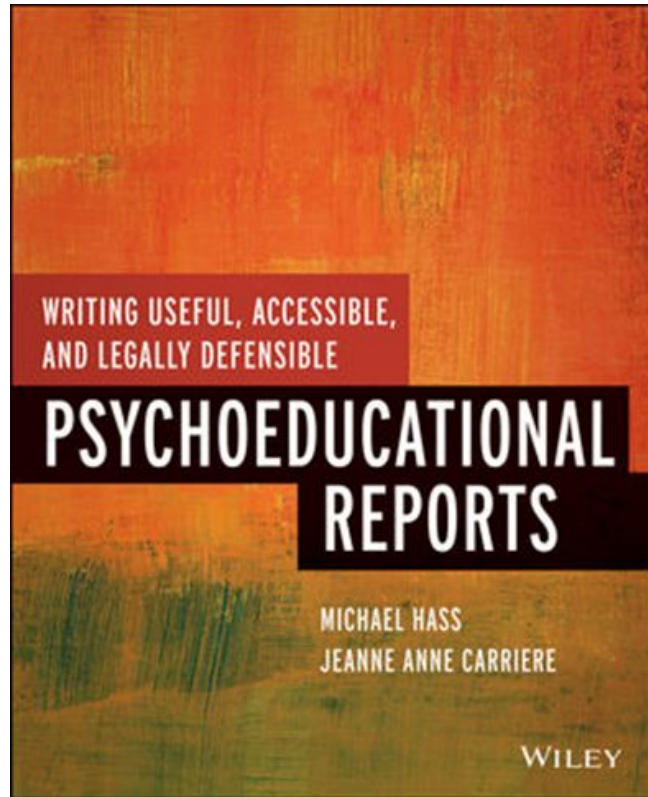


What steps can you take toward writing more useful, accessible and legally defensible reports?



Our Decree to School Psychologists...

Well conceptualized assessment practices and effective psychoeducational reports can shape the value and relevance of our services. They also provide us with reassurance that our practice is legally sound, when questions or concerns do arise. Assessments and reports framed by collaborative consultation, assessment-based answers to referral questions, and quality recommendations exemplify our ability to engage in a broader range of school psychological services. Through the use of consumer friendly report writing practices, our expertise in assessment can be the leverage for more active involvement in collaboration, consultation, prevention and intervention.



Questions or comments?