Writing Useful and Understandable Psychoeducational Reports... *that are also legally defensible*

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Discussion

- When, How, & Where did you learn to write reports?
- How have your reports changed over the course of your career?
- How many of you have had to defend your report (assessment) during a due process hearing?
Questions for today...

1. What are the purposes of psychoeducational reports?
2. What legal requirements and ethical guidelines direct our report writing?
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 my report writing practices to make my reports more useful AND defensible?

Question 1

What are the purposes of psychoeducational reports?
What are the purposes of 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 team’s decisions about special education eligibility
- Forms the foundation for the IEP team’s decisions about educational needs, goals, services and placement
- Although not a purpose, a well constructed and written report can demonstrate compliance with ethical and legal mandates.

On a scale of 1 to 5, do your reports meet these purposes?
Question 2
What legal requirements and ethical guidelines direct our report writing?

NASP Principles for Professional Ethics (2010)

Principle II.3. Responsible Assessment and Intervention Practices
School psychologists maintain the highest standard for responsible professional practices in educational and psychological assessment and direct and indirect interventions.

Standard II.3.2 School psychologists use assessment techniques and practices that the profession considers to be responsible, research-based practice.

- School psychologists select assessment instruments and strategies that are reliable and valid for the child and the purpose of the assessment.
- When using standardized measures, school psychologists adhere to the procedures for administration of the instrument that are provided by the author or publisher of the instrument.

- If modifications are made in the administration procedures for standardized tests or other instruments, such modifications are identified and discussed in the interpretation of the results.
- If using norm-referenced measures, school psychologists choose instruments with up-to-date normative data.
- When using computer-administered assessments, computer-assisted scoring, and/or interpretation programs, school psychologists choose programs that meet professional standards for accuracy and validity. School psychologists use professional judgment in evaluating the accuracy of computer-assisted assessment findings for the examinee.
NASP Principles for Professional Ethics (2010)

Standard II.3.3 A psychological or psychoeducational assessment is based on a variety of different types of information from different sources.

Standard II.3.4 Consistent with education law and sound professional practice, children with suspected disabilities are assessed in all areas related to the suspected disability.

Standard II.3.5 School psychologists conduct valid and fair assessments. They actively pursue knowledge of the student’s disabilities and developmental, cultural, linguistic, and experiential background and then select, administer, and interpret assessment instruments and procedures in light of those characteristics (see Standard I.3.1. and I.3.2).

Standard II.3.8 School psychologists adequately interpret findings and present results in clear, understandable terms so that the recipient can make informed choices.

Professional Competence and Responsibility

Beneficence, or responsible caring, means that the school psychologist acts to benefit others. To do this, school psychologists must practice within the boundaries of their competence, use scientific knowledge from psychology and education to help clients and others make informed choices, and accept responsibility for their work.

Principle II.2. Accepting Responsibility for Actions

School psychologists accept responsibility for their professional work, monitor the effectiveness of their services, and work to correct ineffective recommendations.

Standard II.2.1 School psychologists review all of their written documents for accuracy, signing them only when correct. They may add an addendum, dated and signed, to a previously submitted report if information is found to be inaccurate or incomplete.

NASP Ethical Highlights

School Psychologists should:

- engage in research based assessment practices
- follow IDEA’s evaluation procedures
- interpret findings and present results in clear, understandable terms so that the recipient can make informed choices.
- review all of their written documents for accuracy, signing them only when correct
On a scale of 1 to 5, how well do your current reports meet professional ethical guidelines?

Legal Guidelines

Federal
- Individuals with Disabilities Education Act (IDEA), 20 United States Code section 1400 et seq.
- Case Law, US Supreme Court, US Court of Appeals

State
- Ca. Education Code
- Ca. Code of Regulations
- Case Law, 9th Circuit Court of Appeals

Local
- SELPA/School District Interpretation
- Professional Judgement
Standard of Administrative Law Judge (ALJ) Review

A Typical ALJ’s IEP Review answers the following questions...
- What are the student’s levels of performance?
- What are the student’s unique educational needs?
- Based on these needs, were goals developed to address them?
- Based on the goals, what services, supports, and placement were offered to address those needs?
- Was the program offered reasonably calculated to provide educational benefit?
- Did the district implement the IEP?
- In the LRE?

Our Multidisciplinary Report’s Role In the ALJ’s Review Process...
- Provides evidence that the foundation of the IEP was appropriate by documenting...
  - all areas of suspected disability & all areas of need were evaluated
  - student’s present levels of performance in the areas assessed
  - student’s educational needs
Relationship between evaluation data and the IEP

Solid data creates a strong foundation.

“I can defend a report to the extent it provides the necessary information to appropriately develop an IEP that meets a student’s unique needs”

Jeffery Riel, School District Attorney

Consumer friendly reports are useful and legally defendable
CA Ed Code + IDEA =

- Things that **must actually be included** in your written report

- Things that **must be true** about your assessment

What **must be included**...

at least in California

- Does the student need special education and related services?
  - How was that need determined?
- What relevant behaviors, if any, were noted during the observation of the student?
  - What is the relationship of that behavior to the student’s academic and social functioning?

*Education Code § 56327 (a) - (d)*
Must be included...

- Are there health, developmental, or medical factors that are relevant to the student’s education? Do these factors impact a student’s education? If so, how?
- Do environmental, cultural or economic factors effect the student’s education?
- For learning disabilities, can the discrepancy between ability and achievement be corrected without special education and related services?
- For low incidence disabilities, what specialized services, materials, or equipment are needed?

*Education Code § 56327 (e), (f), (g), (h)*

What *must be true* about your assessment?

In conducting the evaluation, the LEA must:

- Use a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information, including information provided by the parent, ...
- Not use any single measure or assessment as the sole criterion for determining whether the child is a child with a disability and for determining an appropriate educational program for the child; and
- Use technically sound instruments ...Used for the purposes for which the assessments or measures are valid and reliable

300.304(b)(c)
Must be true...

- Assessments and other evaluation materials used to assess the child are:
  - Selected and administered so as not to be discriminatory on a racial or cultural basis;
  - Include those tailored to assess specific areas of educational need and not merely those that are designed to provide a single general intelligence quotient;
  - Administered by trained and knowledgeable personnel; ... in accordance with any instructions provided by the producer of the assessments;
  - Provided and administered:
    - In the child's native language or other mode of communication; and
    - In the form most likely to yield accurate information on what the child knows and can do academically, developmentally, and functionally, unless it is not feasible to so provide or administer; 300.304(c)(1)(i) (ii) (iv) (v) (2)

Must be true...

- Assessments are selected and administered so as to best ensure that if an assessment is administered to a child with impaired sensory, manual, or speaking skills, the assessment results accurately reflect the child's aptitude or achievement level or whatever other factors the test purports to measure, rather than reflecting the child's impaired sensory, manual, or speaking skills (unless those are the skills the test purports to measure);
- The child is assessed in all areas of suspected disability, including, if appropriate, health, vision, hearing, social and emotional status, general intelligence, academic performance, communicative status, and motor abilities; 300.304(c)(3)(4)
Must be true...

- The evaluation is sufficiently comprehensive to identify all of the child's special education and related services needs, whether or not commonly linked to the disability category in which the child has been classified;
- Assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are provided; 300.304(c)(6)(7)

In summary....

The evaluation should...

- 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
Quoting the law does not make it true!!!

“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.”

The evaluation should be comprehensive

Comprehensive means we...
- Evaluate all areas of suspected disability
- Evaluate all areas of related need
- Identify educational needs
The evaluation should use a **variety** of assessment tools that gather functional and relevant data.

**What is a variety of assessment tools?**

R.I.O.T  
(Leung, 1993)

**Demonstrating a variety of tools were used...**

<table>
<thead>
<tr>
<th>Question</th>
<th>Review</th>
<th>Interview</th>
<th>Observation</th>
<th>Testing</th>
</tr>
</thead>
</table>
| What are Loki’s functional academic strengths and weaknesses in reading, written language and math? | School evals  
Work samples | Parent  
Teachers  
Behavioral Aide  
Bradley | SDC  
English/LA  
History  
Geometry  
General Ed  
Graphic Arts | Gray Oral Reading Test-2  
WIAT: Math Calc, Problem Solving, Fluency  
CBA/Functional Skills: Safety Signs, # Sense, Money, Calendar, Time, Reading Comp |

In summary, Loki has some basic academic skills though there are functional academic skills geared toward self-care, safety and independent living that he needs to directly work on. Loki can accurately read text at an approximate 3rd grade level, though his comprehension of what he reads is very limited. He has difficulty answering who, what, when, where questions about text he has read. Loki can identify many community/safety signs though his ability to follow these signs in the community needs further evaluation. Loki has basic number sense and can count with one-to-one correspondence. He is inconsistent with addition, subtraction, and multiplication facts. Loki can adeptly use a calculator to solve basic addition and subtraction. Loki can identify coin and bill amounts, though doesn’t have basic money use skills. Loki tells time well, though needs to develop calendar skills. Loki can write one to two phrases about his own experiences and can write his name and address.

In all three classes in which he was observed, it is clear that Loki has learned class routines. He can independently follow and complete two step directions if they are part of a regular routine, for example transition from one activity to the next. Loki can sometimes follow one new direction at a time, though often needs a verbal prompt from his aide. Loki’s level of engagement in lessons is related to the academic demands. In his classes he attempts all work given to him, though as work is perceived as difficult, he becomes very prompt dependent to start or complete work at whatever level he can. Although he appeared the most independent and least prompt dependent from his aide in his History class, the work he produces is not within the class range and doesn’t directly address his academic needs.
What does **functional** mean?

- Application of learned skills (extends beyond academic achievement)
  - Academic, adaptive, behavioral, social, language, etc...

  *Ask yourself, “What can this child do in real life, under normal circumstances, without the scaffolding of a highly trained adult in a very structured setting?”*

What does **relevant** mean?

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

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

### Discussion: Do my assessments provide functional information?

<table>
<thead>
<tr>
<th>Assessment procedure used to answer the question: What are Loki’s academic strengths and weaknesses in reading, written language and math?</th>
<th>Provides norm referenced data</th>
<th>Provides functional data grounded in real life contexts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wechsler Individual Achievement Test-III (WIAT)</td>
<td>0 = no or little data</td>
<td>0 = no or little data</td>
</tr>
<tr>
<td>Gray Oral Reading Test-2</td>
<td>1 = some data</td>
<td>1 = some data</td>
</tr>
<tr>
<td>WIAT: Math Calc, Problem Solving, Fluency</td>
<td>2 = extensive data</td>
<td>2 = extensive data</td>
</tr>
<tr>
<td>CBA/Functional Skills: Safety Signs, # Sense, Money, Calendar, Time, Reading Comp</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Observations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviews</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Discussion: Do my assessments provide relevant information?

<table>
<thead>
<tr>
<th>Assessment procedure used to answer the question:</th>
<th>Helps consumers understand the child better, including determining a eligibility classification</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are Loki's adaptive skills strengths and weaknesses? How do these impact his academic achievement and educational performance?</td>
<td>0 = not helpful 1 = somewhat helpful 2 = very helpful</td>
</tr>
<tr>
<td>Review: Previous Evals</td>
<td>Helps consumers work more effectively with the child. Directly leads to interventions and/or accommodations</td>
</tr>
<tr>
<td>Testing: Leiter-3</td>
<td>0 = not helpful 1 = somewhat helpful 2 = very helpful</td>
</tr>
<tr>
<td>Testing/Interview: Vineland Adaptive Behavior Scales</td>
<td></td>
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<tr>
<td>Interviews: Teachers, Parents, Aide, Bradley</td>
<td></td>
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<tr>
<td>Class Observations</td>
<td></td>
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<tr>
<td>Community Based Instruction (CBI) Observation</td>
<td></td>
</tr>
</tbody>
</table>

Am I using a variety of tools? Am I collecting relevant information? Am I collecting functional information?
The evaluation should be fair

Bias exists in all areas of assessment and we need to choose techniques and tools that reduce bias to the largest extent possible.

How do you demonstrate that you have met this assessment mandate in your reports?

- Document a systematic process by which you determined the fairest way to approach this evaluation.
- Document the extent that an assessment was not conducted under standard conditions AND interpret the results of that evaluation accordingly.

Poor Example:

Stating fairness in the report

The assessment materials and procedures used for this assessment were selected and administered so as not to be racially, culturally, or sexually discriminatory. The tests and other assessment materials have been validated for the specific purpose for which they were used, and were administered in conformance with the instructions for the test or other assessment materials.

(17.8 readability, 100% Passive)
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 2018 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. Marie said she thinks 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)*

Matt’s cognitive ability was evaluated in 2010, 2013, and 2016 using standardized intelligence tests as part of Special Education evaluations. His performance on these tests, at the scale and subtest level, ranged from significantly below average to above average.

As part of this evaluation, Matt’s cognitive ability was evaluated by a review of previous testing and interviews with Matt, his mother and teacher. Matt was also given the Leiter International Performance Scale (Leiter-3). The Leiter-3 is a nonverbal measure of intelligence and cognitive abilities. Matt has Autism and delays in receptive and expressive language. Non-verbal cognitive testing was used so that Matt’s deficits in verbal skills did not mask cognitive strengths and weaknesses. *(12.5 readability, 37% passive)*
The evaluation should use valid and reliable tools and procedures

*FYI: District ownership doesn’t make a test valid or reliable.*

**Validity:**
- Does this tool measure what it says it does?
- What construct does the manual say the test measures?
- Is this construct supported by research?

**Reliability:**
- How stable or consistent are the results?
- A test cannot be valid if it is not reliable.

Is the tool/procedure valid and reliable overall AND is valid/reliable for this particular evaluation?

Does this demonstrate validity?

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**VALIDITY STATEMENT**

- All tests administered to student are valid
- All tests administered to student are valid except as noted
- Results of tests administered are valid
- Results of tests administered are valid except as noted

This evaluation utilized standardized instruments that represent a comparative match of the normative population to the child. This evaluation is considered to be a valid reflection of the child’s current level of functioning. Materials were selected and tests were administered to ensure that they measured the extent to which the student has a disability and meets special education.

Assessments were administered in the primary language of the student by properly credentialed personnel. The tests and assessment materials utilized are considered to be not racially, culturally or sexually biased, and were used in the manner for which they were validated, except as noted. No environmental, cultural, or economic disadvantages affected the results of this assessment.

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The following accommodations were used to help adjust to the testing situation and to obtain valid results:
- Frequent breaks between tasks/subtests
- Positive reinforcement
- Clarification of directions
- Interruptions simpler with more complex
The evaluation should be completed by a competent evaluator

How is a legal judgment made about your competence?

- Job Description/ Scope of Practice

**NASP** School psychologists are uniquely qualified members of school teams that support students’ ability to learn and teachers’ ability to teach. They apply expertise in mental health, learning, and behavior, to help children and youth succeed academically, socially, behaviorally, and emotionally. School psychologists partner with families, teachers, school administrators, and other professionals to create safe, healthy, and supportive learning environments that strengthen connections between home, school, and the community.

- Professional experience
  - Areas of expertise, general and advanced training, years of experiences

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**Question 3**

What makes a report useful and consumer friendly?
Research says a useful report ...

- Is understandable by the consumer
- Provides clear & feasible individualized recommendations
- Clearly answers the referral questions

(Carriere, 2010; Cornwall, 1990; Eberst & Genshaft, 1984; Harvey, 1997; Harvey, 2006; Rafoth & Richmond, 1983; Teglasi 1983; Weddig, 1984; Wiener, 1985; Wiener & Kohler, 1986; Wiener, 1987)

A useful report is understandable

- If our main audience consists of parents and teachers then we must improve the 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” Klopfer, 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 readability?

Follow George Orwell’s advice:

- 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.

George Orwell, Politics and the English Language (1954)

More thoughts on readability (mine, not George Orwell’s)

- 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 significant illnesses, injuries, or hospitalizations. (Bad, 17.8 readability)

John has not experienced any significant changes related to his health and development in recent years. (OK, 12.0 readability)

John has not had any significant changes in his health in recent years. (Better, 6.7 readability)

John is healthy. (Best, 1.3 readability)

Example: Never use the passive voice where you can use the active voice.

In the preschool setting, John’s difficulty with managing anger, frustration, and fear was noted. (Passive – who did the noting?)

John’s preschool teacher reported that John had difficulty managing his anger, frustration, and fear. (Active – his teachers did)

Unsure?...Do the zombie test.
**Example:** When you must use a technical term, provide clear behavioral examples.

**Technical 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)*

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**Check your readability...**

**In Word**
1. Click the **File** tab, and then click **Options**.
2. Click **Proofing**.
3. Under **When correcting spelling and grammar in Word**, make sure the **Check grammar with spelling check** box is selected.
4. Select **Show readability statistics**.
5. After you enable this feature, open a file that you want to check, and do a spell check. When Word finishes checking the spelling and grammar, it displays information about the reading level of the document.
A useful report provides clear feasible individualized recommendations

(More to come on recommendation's later...)

A useful report clearly answers the referral questions

Report Writing Models
- Test-based
- Domain-based
- Referral/Question based
If your report/section headings look like this...

- Reason for Referral
- Observations
- Wechsler Intelligence Test for Children
- Wechsler Individual Achievement Test
- Comprehensive Tests of Phonological Processing
- Behavioral Assessment System for Children
- Summary

...then you are probably writing **test-based** reports.

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If your report/section headings look like this...

- Reason for Referral
- Background Information
- Observations
- Cognitive Ability
- Academic Achievement
- Social Emotional Functioning
- Summary

...then you are probably writing **domain-based** reports.
If your report/section headings look like this...

- Reason for Referral
- Background Information
- Observations
- Cognitive Ability
  - Wechsler Intelligence Test for Children
- Academic Achievement
  - Wechsler Individual Achievement Test
- Social Emotional Functioning
  - Behavioral Assessment System for Children

...then you are probably writing hybrid test/domain-based reports.

If your report/section headings look like this...

- How do health, developmental, or medical factors affect Rigo’s educational performance?
- What are Rigo’s cognitive and academic strengths and limitations?
- What are Rigo’s social and emotional strengths and challenges?
- Does Rigo meet the Special Education eligibility criteria under Emotionally Disturbed?
- What additions or modifications to Rigo’s current services are needed for him to make adequate progress toward state and district standards?

...then you are probably writing questions-based reports.
Report Structure

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

- What format/structure are you currently using?
- Why are you using this?
- What are the pros and cons of your choice?

Ease for the writer is important...though may not equate to ease for the reader.
Question 4

How can we re-conceptualize report writing to make meet all of these needs?

Evaluation Cycle

Choose assessment procedures

Conduct evaluation

Analyze & synthesize data & identify strengths & needs

Create meaningful recommendations

Identify concerns & reason for referral

Generate hypotheses

STOP
The Referral-Based Consultative Assessment and Report (Batsche, 1983)

- The reason for referral (questions) is identified through a consultative process with the referring person.
- The assessment plan is 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 Report

- Generate Questions & Hypotheses (Clearly stated in the Reason for Referral)
- Choose Assessment procedures (Directly linked to questions)
- Analyze & synthesize data/identify strengths & needs (Clearly answer the assessment questions)
- Meaningful recommendations (Directly linked to the referral questions, concerns and assessment findings)
- Concerns & reason for referral (Identified early in process)
- All parts of the evaluation guide report writing and are directly reflected in the report.

STOP
The Referral-Based/Questions-Driven Assessment Report

<table>
<thead>
<tr>
<th>Supports an Understandable &amp; Useful Report</th>
<th>Promotes a legally defensible evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Is understandable by the consumer</td>
<td>- Is comprehensive</td>
</tr>
<tr>
<td>- Clearly answers the referral questions</td>
<td>- Uses a variety of evaluation approaches that gather functional and relevant data</td>
</tr>
<tr>
<td>- Leads to clear and feasible individualized recommendations</td>
<td>- Demonstrates fairness</td>
</tr>
<tr>
<td></td>
<td>- Uses valid and reliable tools</td>
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<td>- Is completed by a competent evaluator</td>
</tr>
</tbody>
</table>

Question 5

How can I change my report writing practices to make my reports more useful AND defensible?
Step by Step

- Assessment Planning
  - Identifying a clear *Reason for Referral*
  - Developing Evaluation Questions
  - Choosing Assessment Tools
- Answering the Evaluation Questions
  - Interpretation and integration of evaluation data (GRIOT)
- Create Recommendations

Assessment Planning

**Step 1:** The reason for referral (questions) is identified through a consultative process with the referring person.

**Step 2:** Conduct a review of currently available data including:
- Evaluations
- Information provided by the parents,
- Current classroom-based, local, or state assessments
- Classroom-based or service-based observations
- Child’s response to scientifically, research-based interventions, if implemented.

**Step 3:** After the review of existing data, the assessment plan is created in a collective process between the school psychologist, parent, teacher, and other educational professionals. Work with the team to determine what, if any, additional data in addition to the existing data, will be collected during the evaluation to enable the team to answer the evaluation questions.
What might make this difficult?

Reason for Referral

- Communicates the purpose of the referral by:
  - describing the concerns, behaviors, or symptoms that led to the referral.
  - concisely describing the background or recent history of the problem including previous interventions.
  - identifying what areas or domains are to be assessed.
  - communicating what disabilities are suspected.
**Example: Vague Reason for Referral**

A psychoeducational assessment for Special Education eligibility and need was requested by the Student Success Team (SST) on 9-1-18 due to concerns with James’s 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.

(11.2 readability, 20% passive)
Are changes needed in your Reason for Referral section? If so, what? If not, why?

1. __________________________________________
   __________________________________________
2. __________________________________________
3. __________________________________________
   __________________________________________
   __________________________________________

Evaluation Questions

Questions are collaboratively developed, student specific and are drawn directly from the reason for referral.

- General question types:
  - How do health, developmental, or medical factors influence academic achievement and educational performance?
  - What are the present levels of functioning and educational needs in relevant areas?
  - Is a disability present? If so, what kind?
  - Are changes in the educational program, including special education, needed? If so, what kind?
**Example:** General Evaluation Questions

- How do health, developmental, or medical factors influence Mark’s academic achievement and educational performance?
- What are Jose’s academic skills relative to the grade level standards?
- How do Sarah’s cognitive strengths and limitations affect her learning and academic achievement?
- Does Anthony have a Specific Learning Disability?
- What are Tien’s educational needs?
- What accommodations or modifications to the curriculum does Harmony need to make adequate progress toward Common Core standards?

**Example:** Evaluation Questions

Based on a review of records and interviews with Loki’s mother and case manager, this evaluation was designed to answer the following questions:

1. How does Loki’s developmental, medical, and educational history impact his current academic achievement and educational performance?
2. What are Loki’s cognitive strengths and weaknesses? How do these impact his learning?
3. What are Loki’s functional academic strengths and weaknesses in reading, written language and math?
4. What are Loki’s adaptive, social-emotional and behavioral strengths and weaknesses? How do these impact his academic achievement and educational performance?
5. Are Loki’s current Special Education eligibility, goals, services and placement meeting his educational needs?
6. What accommodations, modifications, and recommendations are needed to support Loki’s academic, adaptive, behavioral and social growth?
**Example: Reason for Referral & Assessment Questions**

Loki is a 16.10 year-old young man attending school at Asgard High School in Odin School District. Loki is currently in 11th grade and receives Special Education services through placement in a blend of Special Day Classes and general education classes. Loki has received Special Education services under the eligibility of Autism since his initial evaluation in January of 2005 at the age of 3. Loki was last evaluated by OSD for his triennial review in November of 2016. Loki had met 7 of his 9 2015 IEP goals. His placement consisted of approximately 60% of his day within a Special Day Class setting and 40% of his day within a general education setting. Loki also continued to receive Speech and Language and Occupational Therapy services, and accommodations including extra aide support. The IEP team placed Loki on a Certificate of Completion track with the plan that he would transition to the Odin Adult Transition Program (OATP) for services once he finished the traditional four year high school program. In November of 2017, an annual Individualized Education Plan (IEP) meeting was held to review Loki’s educational needs, goals, services and placements. The school based team recommended that Loki’s placement change to more of his day within a Moderate to Severe (MS) Special Day Class setting to allow him to work on functional skills and adaptive behaviors. Although his parents acknowledged that these were important skills for Loki to learn, they disagreed with this placement and requested an Independent Educational Evaluation (IEE) to assess Loki’s educational strengths and challenges with the goal of identifying appropriate school based goals, services and placement for Loki. OSD agreed to the IEE.

Based on a review of records and interviews with Loki’s mother, Margarita Swift, this evaluation was designed to answer the following questions:

- How does Loki’s developmental, medical, and educational history impact his current academic achievement and educational performance?
- What are Loki’s cognitive strengths and weaknesses? How do these impact his learning?
- What are Loki’s functional academic strengths and weaknesses in reading, written language and math?
- What are Loki’s adaptive skills strengths and weaknesses? What are Loki’s social-emotional and behavioral strengths and weaknesses? How do these impact his academic achievement and educational performance?
- What accommodations, modifications, and recommendations are needed to support Loki’s academic, adaptive, behavioral and social growth?

**Example: Assessment Planning/Organization using referral questions**

<table>
<thead>
<tr>
<th>Assessment Questions</th>
<th>Review</th>
<th>Interview</th>
<th>Observe</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>How does Loki’s developmental, medical, and educational history impact his current academic achievement and educational performance?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are Loki’s cognitive strengths and weaknesses? How do these impact his learning?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are Loki’s functional academic strengths and weaknesses in reading, written language and math?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are Loki’s adaptive, social-emotional and behavioral strengths and weaknesses? How do these impact his academic achievement and educational performance?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are Loki’s current Special Education eligibility, goals, services and placement meeting his educational needs? What accommodations, modifications, and recommendations are needed to support Loki’s academic, adaptive, behavioral and social growth?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Think about the last evaluation you completed. What was the reason for referral? What were the specific questions you were trying to answer?

**Reason for referral:**
_________________________________________
_________________________________________
_________________________________________

**Questions:**
1. _______________________________________
2. _______________________________________
3. _______________________________________
4. _______________________________________
5. _______________________________________
Assessment Tools

Tools are chosen to gather information to answer the specific evaluation questions

How can you make it more clear for the reader what assessment tools you used... and why?

Assessment Tools/Procedures Checklist

_____ I chose tools that are reliable and valid.
_____ I chose tools that are reliable and valid for this particular evaluation.
_____ I chose tools that demonstrate my evaluation was comprehensive.
_____ I chose tools that collected relevant data/information.
_____ I chose tools that collected relevant data/information.
_____ I chose tools that will collect the information I need to answer the referral questions.
**Example: Assessment Tools by RIOT**

<table>
<thead>
<tr>
<th>Review of Records</th>
<th>10/18/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cumulative School Records</td>
<td>10/18/17</td>
</tr>
<tr>
<td>RtI Progress Monitoring Data</td>
<td>10/18/17</td>
</tr>
<tr>
<td>Open Court Assessment Data</td>
<td>10/18/17, 11/6/17</td>
</tr>
<tr>
<td>Classroom Work Samples</td>
<td>10/18/17, 11/6/17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Interviews</th>
<th>10/30/17, 11/6/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Wilson, Student</td>
<td>10/30/17, 11/6/17</td>
</tr>
<tr>
<td>Mrs. Wilson, Mother</td>
<td>10/18/17, 10/29/17</td>
</tr>
<tr>
<td>Mr. Lewis, 5th Grade Teacher</td>
<td>10/18/17, 10/31/17</td>
</tr>
<tr>
<td>Ms. Page, RtI Teacher</td>
<td>10/18/17, 11/1/17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Observations</th>
<th>10/31/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small group guided reading instruction</td>
<td>10/31/17</td>
</tr>
<tr>
<td>Whole class direct math instruction</td>
<td>11/1/17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Testing</th>
<th>11/12/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Differential Ability Scales-2</td>
<td>11/12/17</td>
</tr>
<tr>
<td>Comprehensive Test of Phonological Processing (CTOPP)</td>
<td>11/12/17</td>
</tr>
<tr>
<td>Behavior Assessment System for Children-3, Parent Rating Scale</td>
<td>10/29/17</td>
</tr>
<tr>
<td>Behavior Assessment System for Children-3, Teacher Rating Scale</td>
<td>10/31/17</td>
</tr>
<tr>
<td>Behavior Assessment System for Children-3, Self Report</td>
<td>10/30/17</td>
</tr>
</tbody>
</table>

**Answer the Evaluation Questions**

- Assessment data from multiple sources (RIOT) is interpreted, integrated, and synthesized to answer the referral questions.

- Results are presented as answers to the referral questions.

---

**Where the magic happens**

---

**Your comfort**
**Example:** No interpretation and integration of data

**Test of Auditory Processing-3**

The TAPS-3 is an individually administered assessment of auditory skills necessary for the development, use, and understanding of language commonly utilized in academic and everyday activities. The TAPS-3 is appropriate for use with individuals aged 4 years 0 months through 18 years 11 months. The measure yields three indices including the Basic Phonological Index, Auditory Memory Index, and Auditory Cohesion Index. These indices comprise the overall auditory processing score. Based on results of this assessment, Leslie’s auditory processing skills are within the Average range when compared to same age peers in the norm group. Leslie’s Basic Phonological Index cluster score of 92 fell within the average range. She scored within the average range on the Word Discrimination subtest, which assessed her ability to determine if two verbally presented words are the same or different. She scored within the average range on the Phonological Segmentation subtest, which assessed her ability to manipulate syllables and phonemes within words. Leslie performed within the average range on the Phonological Blending subtest, which assessed her ability to blend individual sounds together. *(14.6 readability, 0% passive)*

**Example:** Interpret and integrate multiple sources of data

Leslie’s auditory processing skills were evaluated using standardized tests, classroom observations, and interviews with her parents and teacher. Leslie’s performance on the XXXX was in the average range. For example, during testing she was proficient at determining if two words she heard were the same or different, manipulating sounds and blending sounds together. She also did well repeating lists of numbers, words, and sentences and listening to short stories and answering questions.

Interviews with her teacher and observations of Leslie in the classroom suggest that her performance on the XXXX is consistent with the skills she shows in the classroom and at home. Leslie demonstrates a solid understanding of lecture material. She asks appropriate questions, follows along and actively participates in class discussions. At home, her parents say she is a good listener. She quickly and correctly completes tasks they ask of her. The family enjoys watching movies together, and based on their discussions, they believe she has good listening comprehension. *(10.9 readability, 0% passive)*
**Example:** No interpretation or integration
### Evaluation Matrix: Integrate & Synthesize data

<table>
<thead>
<tr>
<th>Question</th>
<th>Review</th>
<th>Interview</th>
<th>Observation</th>
<th>Testing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

### Evaluation Matrix: Weak example....

<table>
<thead>
<tr>
<th>Question</th>
<th>Review</th>
<th>Interview</th>
<th>Observation</th>
<th>Testing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>KTEA</td>
</tr>
<tr>
<td></td>
<td>Report Cards</td>
<td>Standardized testing</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- I chose tools that are reliable and valid.
- I chose tools that are reliable and valid for this particular evaluation.
- I chose a variety of tools to answer each question.
- I chose tools that collected functional data/information.
- I chose tools that collected relevant data/information.
- I chose tools that will collect the information I need to answer the referral questions.
- I integrated data from a variety of sources to answer the referral questions?
Evaluation Matrix: Better example....
Integrate multiple sources of data

<table>
<thead>
<tr>
<th>Question</th>
<th>Review</th>
<th>Interview</th>
<th>Observation</th>
<th>Testing</th>
</tr>
</thead>
</table>

_____ I chose tools that are reliable and valid.
_____ I chose tools that are reliable and valid for this particular evaluation.
_____ I chose a variety of tools to answer each question.
_____ I chose tools that collected functional data/information.
_____ I chose tools that collected relevant data/information.
_____ I chose tools that will collect the information I need to answer the referral questions.
_____ I integrated data from a variety of sources to answer the referral questions?

What are Loki’s functional academic strengths and weaknesses in reading, written language and math?

Loki’s reading, writing, and math skills were evaluated through standardized testing, curriculum-based assessment, observations, work sample reviews, and interviews with his teacher, mother, and Loki.

As part of the current evaluation Loki was given the Gray Oral Reading Tests-5th edition (GORT-5) Form A to evaluate his reading skills. The GORT is a standardized norm-referenced test of oral reading fluency and comprehension. His scores are in the following table and his performance is reviewed below.

<table>
<thead>
<tr>
<th>GRAY ORAL READING TESTS-5TH EDITION (GORT-5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Score/Scaled Score</td>
</tr>
<tr>
<td>---------------------------------</td>
</tr>
<tr>
<td>Oral Reading Index: 62</td>
</tr>
<tr>
<td>Rate</td>
</tr>
<tr>
<td>Accuracy</td>
</tr>
<tr>
<td>Fluency</td>
</tr>
<tr>
<td>Comprehension</td>
</tr>
</tbody>
</table>

Loki’s Oral Reading Index, an overall measure of his reading rate, accuracy, fluency and comprehension was in the significantly below average range. Loki has relative strengths in reading rate, accuracy, and fluency. When given text, Loki reads very quickly and accurately. However, he typically ignores punctuation. Loki has memorized many words, though he doesn’t have the phonics skills to try to decode words he hasn’t seen before. When Loki came to a word he didn’t know he either guessed based on an initial letter or misread it. Loki did not use the context of the story to self-correct his misreading. Loki also added the word ‘the’ to sentences, misread site words such as in/the that/this, and left off plurals in words. All of these behaviors suggest that Loki is not reading the text for comprehension or understanding. Literal comprehension, or the ability to answer who/what/when/where questions of what he has read was very difficult. Loki often answered using some information from the story, though not related to the question. On the GORT, although Loki could accurately read text at an approximate 3rd grade level, his comprehension of what he read was very limited.
To further evaluate Loki’s reading comprehension he was given a series of reading comprehension worksheets from www.k5learning.com. Loki was able to independently read basic sentences (The lake is frozen. The table sits six people.) and match these to a picture. When given a short story at an approximate 1st grade level, Loki independently read the story and answered 20-25% of the literal comprehension questions correctly. Similar to his performance on the GOBT, Loki provided answers that are related to the story though did not directly answer the question. Lastly, Loki was shown pictures of 12 community/safety signs to evaluate his ability to identify and understanding their meanings. Loki was able to identify the majority of the signs and provide a meaning though his ability to follow these signs in the community would need to be evaluated before it was clear he understood them. The signs and his responses are in the following table:

<table>
<thead>
<tr>
<th>Sign</th>
<th>Loki’s response To “What is this sign?”</th>
<th>Loki’s response To “What does this sign mean?”</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop</td>
<td>Stop</td>
<td>Stop wait</td>
</tr>
<tr>
<td>School Zone</td>
<td>Pedestrian</td>
<td>Walk</td>
</tr>
<tr>
<td>Exit</td>
<td>Get out building</td>
<td></td>
</tr>
<tr>
<td>Handicap Access/Parking</td>
<td>Parking Lot</td>
<td>Parking Lot</td>
</tr>
<tr>
<td>Yield</td>
<td>Yield on</td>
<td>Yield on</td>
</tr>
<tr>
<td>Railroad Crossing</td>
<td>Rail track</td>
<td>We wait</td>
</tr>
<tr>
<td>No bicycles</td>
<td>Bike</td>
<td>You don’t ride on street</td>
</tr>
<tr>
<td>Pedestrian Crossing</td>
<td>Pedestrian can walk</td>
<td>Pedestrian can walk</td>
</tr>
<tr>
<td>Bike Route</td>
<td>bike route</td>
<td>You go</td>
</tr>
<tr>
<td>Men’s Restroom’s</td>
<td>Go the boy’s bathroom</td>
<td>Go the boy’s bathroom</td>
</tr>
<tr>
<td>Women’s Restroom</td>
<td>No answer, though when asked if he could use this bathroom, Loki stated “No. Get in trouble.”</td>
<td></td>
</tr>
</tbody>
</table>

Loki was given the Mathematics and Math Fluency Composites of the Wechsler Individual Achievement Test—Third Edition (WIAT-III). The WIAT-III is an individually administered measure of academic achievement including oral language, reading, written language, and mathematics. The Mathematics Composite includes two subtests, Math Problem Solving and Numerical Operations. Math Problem Solving is a measure of solving verbally framed “word problems” presented both orally and in writing or with illustrations. Numerical Operations requires solving paper-and-pencil computation with only a few items for each computational skill.

<table>
<thead>
<tr>
<th>Composite/Subtests</th>
<th>Standard Score</th>
<th>95% Confidence Interval</th>
<th>Percentile Rank</th>
<th>Qualitative Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mathematics</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Math Problem Solving</td>
<td>48</td>
<td>42-54</td>
<td>&lt;.01</td>
<td>Sig. Below Average</td>
</tr>
<tr>
<td>Numerical Operations</td>
<td>49</td>
<td>35-45</td>
<td>&lt;.01</td>
<td>Sig. Below Average</td>
</tr>
<tr>
<td><strong>Math Fluency</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Math Fluency - Addition</td>
<td>47*</td>
<td>40-54</td>
<td>&lt;.01</td>
<td>Sig. Below Average</td>
</tr>
<tr>
<td>Math Fluency - Subtraction</td>
<td>44</td>
<td>33.55</td>
<td>&lt;.01</td>
<td>Sig. Below Average</td>
</tr>
<tr>
<td>Math Fluency - Multiplication</td>
<td>46</td>
<td>36.56</td>
<td>&lt;.01</td>
<td>Sig. Below Average</td>
</tr>
</tbody>
</table>

Loki’s performance on the overall composite was in the significantly below average range. When word problems were read to him and he had visual support, Loki was able to identify numbers 1-10 and identify basic shapes. Loki had difficulty identifying comparative concepts such as first, second, least, all, and same. When given single digit computation, Loki used a variety of strategies such as counting backwards and touch math, though these were inconsistent and often used incorrectly. He was able to inconsistently add, subtract, and multiply. Loki sometimes did not pay attention to the signs, even when prompted to do so. He could not regroup in addition or subtraction.

Math fluency is the ability to perform mathematical problems accurately and quickly. Math facts automaticity enables students to retrieve them from long-term memory without conscious effort or attention, allowing children to use their working memory to focus on more complex problem solving. The WIAT-III Math Fluency composite includes three separate subtests for speed of performing basic addition, subtraction, and multiplication facts. Loki knows some multiplication facts. He tends to mix operations (addition, subtraction, and multiplication) regardless of the signs. Loki’s performance on these skills is inconsistent. For example, he was observed playing a math addition game on his Chromebook during free time in his History class. During the game, Loki was able to quickly and accurately solve single digit addition for numbers 1 to 5. His parents report that at home he will usually solve problems with numbers 0 to 5, but then asks for a calculator for larger numbers.
Loki’s functional math skills were also evaluated. Loki was able to rote count to 100. He can count by tens to 100 and by five to 50. Loki uses one-to-one correspondence to count and identify the number of items in a group. Loki has some basic calendar skills. He can read the days and months of the year, and if the day of the week is pointed out to him he can identify tomorrow. He was inconsistent identifying yesterday. Loki was unable to identify how many days were in a week or what day came after another day without looking at the calendar. When given coins and bills ($1, $5, $10), Loki can identify all names and identifies coins by how many cents they are worth. He does not understand that $1 is 100 cents, though did identify $5 as 5 dollars. Loki cannot yet combine coin amounts to count change. He doesn’t consistently demonstrate the ability to round up when paying for items, such as giving someone $3 when the cost is $2.50. Loki fluently tells time to the minute on an analog clock. He is also able to follow visual schedules and learns regular routines very quickly. He has good directional sense and can move freely around his school when he delivers call slips to classrooms. His parents have also reported that Loki learns directions easily and will tell them which way they need to turn when they are driving to places he has been before.

Loki can independently write a few phrases about his experiences when given a clear writing prompt. Loki functionally prints using a mix of upper and lowercase letters, though his writing is legible. For example, during testing Loki was asked to write about his favorite game and include three reasons why he liked it. He wrote, “I like basketball To shoot hoops in the court. I like To Win The game.” Loki had also recently taken a trip to Las Vegas with his parents and when asked to write about something he did in Las Vegas, Loki wrote “We went to the hotel room 100 Building in Cran’s Jr I ate questions pistachio muffin.” In his English and History classroom, Loki has regular writing assignments where he is asked to summarize what he has independently read and what he has heard from a CNN-10 student news broadcast the class has watched. For English, Loki will correctly copy the name and pages of a book he has read, though instead of writing a few sentences about what he has read, he tends to directly copy from the book. When he hasn’t copied from the book, his summaries are unrelated to the book’s content. Similarly, when asked to summarize what he finds interesting about the CNN broadcast designed for students, Loki tends to write repetitive ideas that are unrelated to the broadcast context. During these assignments, Loki adeptly uses his Chromebook and types using a few fingers. His spelling is accurate, though he doesn’t use punctuation, rather he combines ideas by using the word ‘and’. For example, on 10/23/18 Loki previewed the CNN 10 broadcast on his Chromebook and then watched it again with his class. There were segments on the Russian arms treaty, two brothers that run triathlons together and an elephant that loves smashing huge pumpkins. After the episode was over, Loki followed the oral direction and got his Chromebook out to start writing. He wrote “Carin size was on the mountains and fell off the cliff and climb rocks and see lots of buildings and using the boys’ bathroom at breakfast and lunch time in the boys bathroom and play basketball and football people went to your new homes and play in the playground and play on the swings and play monkey bars in the playground search four roses.”
Create recommendations

**Recommendations flow from the report questions and answers.**

Recommendations should be...
- tied to identified needs
- reflect an understanding of the classroom and the curriculum.
- student specific
- clearly explained

**Types of recommendations:**
- Identification of educational needs
- Instructional supports/accommodations
- Curriculum modifications (different level and/or instructional materials)
- Interventions tied to identified needs
- Specialized supports or services
- Community referrals

**Example:** Clear, feasible individualized recommendations

- James has weak phonetic skills. Based on the current reading assessment he needs continued instruction and practice with decoding irregular vowels.
- James can currently read and spell the first 300 sight words in the Frye site word list. Continued practice with the next 300 words will improve his fluency and accuracy in both reading and writing.
- James has successfully transitioned to his new school this year. He will transfer to a middle school for 6th grade this fall. To support a smooth transition and continued academic and social success the counselor will work with James’ mother on choosing an appropriate middle school. The counselor will also contact James’ middle school counselor to share successful supports for Cade.
- James has demonstrated excellent leadership skills and he is well liked by other students. Encouraging James to join clubs and/or sports teams in middle school will help to continue his success with peer relationships.
What accommodations, modifications, and recommendations are needed to support Loki’s academic, behavioral and social growth?

Loki has received Special Education services under the eligibility of Autism since his initial evaluation. He currently has a secondary eligibility of Speech and Language Impairment. Loki clearly continues to meet eligibility under both of these categories and has educational needs associated with these eligibility categories. However, based on the current evaluation it is important to note that Loki also meets eligibility under Intellectual Disability and Multiple Disabilities. Within Special Education, California defines an Intellectual disability (ID) as significantly below average general intellectual functioning, existing concurrently with deficits in adaptive behavior and manifested during the developmental period that adversely affects a child’s educational performance. Multiple disabilities (MD) is defined as concomitant, or related, impairments for example, Autism and ID, such as the combination leads to severe educational needs that they cannot be accommodated in special education programs solely for one of the impairments. Eligibility will be reviewed at his IEP meeting and decided on by the IEP team. Within Special Education, a student’s educational needs, not their specific eligibility for services, is the foundation for their Individualized goals, services and placements. Changing Loki’s Special Education eligibility will not change his goals, services or placement though it may give a more accurate overview of his educational needs which will help the IEP team develop a program of appropriate goals and services. Information in this evaluation can also be shared with ROOC and may open up access to more services and supports.

Based on this evaluation, Loki’s current blended placement of General Education, Mild Moderate classes, and one day of Community Based instruction is not meeting his educational needs. Loki’s academic skills are not within the range of his current MM core classes. The adapted curriculum does not align with his present levels of skills or his IEP goals, nor do they meet his educational needs even with significant modifications. His current placement also allows for very limited time to directly work on and be supported in meeting all of his IEP goals. Loki’s parents have voiced concerns with a more restricted placement, especially regarding learning inappropriate behavior and limited social engagement opportunities. Their concerns need to be addressed in light of Loki’s relatively positive experiences with CBI and peers in the program. It is important to Loki’s parents that he continue to have opportunities with general education peers. Loki enjoys PE and has also enjoyed some of his electives. The team should consider how to best support Loki’s social engagement and flexibility in the general education setting while also addressing his functional and adaptive goals.

Interagency collaboration is very important for Loki. He currently receives Speech Language and Occupational Therapy services at school and privately. He also receives private ABA services. Although school services are working on educationally relevant skills and his private services are working on home and community skills there is still a lot of overlap in the areas they are addressing, especially in verbal communication and social interaction. Loki’s service providers need to share assessment data and progress reports so that intervention strategies can be aligned between school and home and generalization of skills supported.

How can you improve the recommendations that you include in reports?

1. __________________________________________________________
   __________________________________________________________

2. __________________________________________________________
   __________________________________________________________

3. __________________________________________________________
   __________________________________________________________

4. __________________________________________________________
   __________________________________________________________
Putting it all together into a report...

- What steps can you take toward writing more useful and legally defensible reports?
- How can you incorporate these ideas into your assessment practices?
- How can you reflect these practices into your current report structure/format?

In small groups, discuss these questions. Write down a few ideas.

1. ______________________________________________________________________
2. ______________________________________________________________________
3. ______________________________________________________________________
4. ______________________________________________________________________
5. ______________________________________________________________________
My 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 and Comments?

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