

Annotated Evaluation Report

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Pennsylvania Training and Technical Assistance Network

PaTTAN's Mission

The mission of the Pennsylvania Training and Technical Assistance Network (PaTTAN) is to support the efforts and initiatives of the Bureau of Special Education, and to build the capacity of local educational agencies to serve students who receive special education services.

PDE's Commitment to Least Restrictive Environment (LRE)

Our goal for each child is to ensure Individualized Education Program (IEP) teams begin with the general education setting with the use of Supplementary Aids and Services before considering a more restrictive environment.

New Annotated Document

- Most important piece of information
 - THERE IS NO CHANGE TO THE EVALUATION REPORT FORM OR LAW/REGUALTIONS RELATED TO THE EVALUATION REPORT OR EVALUATION PROCESS
- New annotated document is response to need in the field
 - More specific information related to the development of Evaluation Reports made available
 - More training and technical assistance available for educators and parents
 - Improved results of Bureau of Special Education Compliance Monitorings
- Results in development of Evaluation Reports that are:
 - Reader and user friendly
 - Written to lead multidisciplinary and IEP teams to good eligibility decisions and program development

Purpose of Evaluation Report

- Evaluation Reports fulfills the following purposes
 - Document the results of the initial multidisciplinary evaluation (MDE) conducted on a student
 - Document the eligibility decision reached by the MDE team
- Provide understanding and direction for family, school staff and other professionals
- More than summary of results, provides recommendations that improve student functioning

Intended Audience of Evaluation Reports

- Wide variety of readers
 - Parents
 - School Staff
 - Clinical professionals
 - Other service providers
- Implications for writers – attend to:
 - Readability levels
 - Use of jargon
 - Length of report
 - Usability
 - Clarity and completeness of information

When an Evaluation Report is Needed

- A general education student is evaluated for special education eligibility
- A special education student, identified in another state, moves in to PA
- A student, identified in Early Intervention with a disability not recognized in school-age eligibility, transitions to school-age services

Timelines for Evaluation Reports

- **Date of Report**
 - No more than 60 calendar days from the receipt of parental consent for an initial evaluation
 - No more than 30 calendar days from the IEP team meeting
- **Date Report Provided to Parent**
 - Should not be more than 60 calendar days from the receipt of parental consent for an initial evaluation

Timelines for Evaluation Reports

- These timelines do not include days outside of the school term
- School term definition
 - The day after the last day of the spring school term up to and including the day before the first day of the subsequent fall school term.
 - School terms are defined by the first day the school staff returns in the fall until the last day the school staff reports in the spring.

Sections of Evaluation Reports

1. Reason(s) for Referral
2. Sources of Evaluation Data
3. Evaluation Conditions
4. Determining Factors
5. Summary of Findings/Interpretation
6. Conclusions

Biographical Information

- Complete all information
- Be specific
- Add additional information as appropriate
- Other information section should provide any special circumstances or additional information necessary

Evaluation Report – Main Body

- 1. Reason(s) for Referral***
2. Sources of Evaluation Data
3. Evaluation Conditions
4. Determining Factors
5. Summary of Findings/Interpretation
6. Conclusions

Reason(s) for Referral

- Thoroughly and concisely describe why this evaluation has been conducted
- Reflect the two-prong eligibility questions
 - Does the student have a disability
 - Do they need specially designed instruction
- Information should:
 - Match areas of concern in request for consent form
 - Direct the assessments conducted during this evaluation

Evaluation Report – Main Body

1. Reason(s) for Referral
- 2. Sources of Evaluation Data**
3. Evaluation Conditions
4. Determining Factors
5. Summary of Findings/Interpretation
6. Conclusions

Sources of Evaluation Data

- Contains all assessment results collected throughout the evaluation process
- How results are displayed are decision of writers – care must be taken to ensure information is clear, concise and reader friendly
- If the student is suspected of having a Specific Learning Disability (SLD) during the process of this evaluation
 - Teams must also complete the Determination of SLD section at the end of the Evaluation Report
 - If overlap of information between the two sections occurs, it is permissible to copy information from one section to the other
 - Must answer all questions in each section

Sources of Evaluation Data

Five individual categories in this section of the report:

- A. Evaluations and information provided by the parent of the student
- B. Observations
- C. Recommendations by teachers
- D. The student's physical condition (including health, vision, hearing); social or cultural background; and adaptive behavior relevant to the student's suspected disability and potential need for special education
- E. Assessments

Evaluation Report – Main Body

1. Reason(s) for Referral
2. Sources of Evaluation Data
- 3. *Evaluation Conditions***
4. Determining Factors
5. Summary of Findings/Interpretation
6. Conclusions

Evaluation Conditions

- It is important to have access to any information regarding variances from standard assessment conditions
- If the evaluation was conducted under standard conditions simply state that
- If the evaluation was not conducted under standard conditions, provide a concise description of how the conditions varied

Evaluation Report – Main Body

1. Reason(s) for Referral
2. Sources of Evaluation Data
3. Evaluation Conditions
- 4. *Determining Factors***
5. Summary of Findings/Interpretation
6. Conclusions

Determining Factors

4. DETERMINING FACTORS – A student must not be found to be eligible for special education and related services if the determining factor for the student's disability is any of those listed below. Respond Yes or No to, and provide evidence for, each determining factor below.

☐ Yes ☐ No

Lack of appropriate instruction in reading, including the essential components of reading instruction. Provide evidence:

☐ Yes ☐ No

Lack of appropriate instruction in math. Provide evidence:

☐ Yes ☐ No

Limited English proficiency. Provide evidence:

Determining Factors

- A student may not be identified as a student with a disability if the reason they are not achieving is:
 - Lack of appropriate instruction in reading, including the essential components of reading instruction
 - Lack of appropriate instruction in math
 - Limited English proficiency
- Check “Yes” or “No” box
 - Yes means – the team DOES BELIEVE the student is struggling due to lack of appropriate instruction in reading, math or English language proficiency
 - No means – the team DOES NOT BELIEVE the student is struggling due to lack of appropriate instruction in reading, math or English language proficiency
- Provide clear evidence that supports the Yes or No response
 - Describe why the team made that decision
 - Do not leave that section blank!

Evaluation Report – Main Body

1. Reason(s) for Referral
2. Sources of Evaluation Data
3. Evaluation Conditions
4. Determining Factors
- 5. *Summary of Findings/Interpretation***
6. Conclusions

Summary of Finding/Interpretation

- A. Present Levels of Academic Achievement
 - Present academic levels, strengths and needs
- B. Present Levels of Functional Performance
 - Activities of daily living, present levels, strengths and needs
- C. Behavioral Information
 - Social, emotional and behavioral present levels, strengths and needs

Summary of Finding/Interpretation

- Summarize and organize the data collected throughout the evaluation process
- Make connections across the data and analyze results
- Preparing to answer two-prong question
 - Does the student have a disability
 - Do they need specially designed instruction
- Not meant to be a repeat of results but a summary and interpretation
- All referral questions, and additional questions raised throughout the process, should have information found here
- This information will go to the IEP PLAAFP section if eligible

Evaluation Report – Main Body

1. Reason(s) for Referral
2. Sources of Evaluation Data
3. Evaluation Conditions
4. Determining Factors
5. Summary of Findings/Interpretation
- 6. *Conclusions***

Conclusions

- Answering the two-prong question
 - Must answer “Yes” to both questions to be considered eligible for Special Education
- Three possible outcomes to two-prong question
 1. Does not have a disability – Not Eligible
 2. Does not need specially designed instruction – Not Eligible
 3. Has a disability & needs specially designed instruction – Eligible

Conclusions

- If eligible, specify disability category(ies) identified
 - Primary
 - Secondary
 - Team decision, based on impact, has no relation to placement decisions (those decisions are based on need)
 - Use more than two spaces if needed
- Recommendations
 - Include information to help IEP team or general education teachers work with student

Evaluation Team Participation

Signatures:

- When SLD was considered during the evaluation
 - ER must be signed or initialed by evaluation team members
 - If signed electronically, team members should initial next to name
- When only other disability categories were considered during the evaluation (Not SLD)
 - List the team members
 - Signature by participant not needed, just list

Evaluation Team Participants

- Participants check “Agree” or “Disagree” with conclusions
 - Only required when SLD has been considered
 - Not required if SLD was not considered
- If a team members checks “Disagree”
 - They must attach a separate statement that clarifies their dissenting opinion

Determination of Specific Learning Disability (SLD)

SLD Component to Evaluation Report

- Completed only when team is considering if the student has an SLD
- Complete if the student is identified with SLD or not, it's whether the team asked the question about the existence of SLD, not the answer to that question
- Complete all 10 items
 - Can incorporate in to sections 5 and 6
 - Can cut and paste information

Evaluation Report – SLD Section

1. Adequate Achievement -

The student does not achieve adequately for the student's age or does not meet State-approved grade-level standards in one or more of the following areas when provided with learning experiences and scientifically based instruction appropriate for the student's age or State-approved grade level standards and level of English language proficiency: oral expression, listening comprehension, written expression, basic reading skill, reading fluency skills, reading comprehension, mathematics calculation, and mathematics problem-solving.

Evaluation Report – SLD Section

2. Identify eligibility model used – choose one

- a) Response to Scientific Research-Based Intervention (RtII)
- b) Severe Discrepancy between Intellectual Ability and Achievement
- c) Must comply with LEA's Special Education Plan

Evaluation Report – SLD Section

3. The instructional strategies used and the student-centered data collected
 - a) Describe instructional strategies and/or interventions used
 - b) Information from before evaluation began and during evaluation

Evaluation Report – SLD Section

4. The educationally relevant medical findings, if any
 - a) Are there issues that would account for the lack of achievement?
 - b) Information from family, school screenings or outside sources

Evaluation Report – SLD Section

5. The effects of the student's environment, culture, or economic background
 - a) Describe any aspect of environment, culture, or economic background that would impact achievement/school performance

Evaluation Report – SLD Section

6. Data demonstrating that prior to referral or as part of the referral process for a specific learning disability, the student's regular education instruction was delivered by qualified personnel, including the English as a Second Language (ESL) program, if applicable
 - a) Document that regular education was delivered by qualified personnel
 - b) Address trainings completed by staff in curriculum, interventions and/or staff certifications

Evaluation Report – SLD Section

7. Data based documentation of repeated assessments of achievement at reasonable intervals, reflecting progress during instruction, which was provided to the parents
 - a) Document academic assessments collected over time that were used to monitor achievement
 - b) Document how information was given to parents

Evaluation Report – SLD Section

8. An observation in the student's learning environment (including the regular classroom setting) to document the student's academic performance and behavior in the areas of difficulty. Note the relationship of that behavior to the student's academic functioning
 - a) Observe in learning environment
 - b) Should be in setting where academic difficulties occur
 - c) Document interactions with teachers and peers
 - d) Comment on relationship between student's behavior and academic functioning

Evaluation Report – SLD Section

9. Other data, if needed, as determined by the evaluation team
 - a) Add any additional, relevant information
 - b) Outside evaluations, etc.

Evaluation Report – SLD Section

10. Include a statement for each item below to support the conclusions of the evaluation team that the findings are not primarily a result of:
 - a) Visual, hearing, motor disability
 - b) Mental retardation
 - c) Emotional disturbance
 - d) Cultural factors
 - e) Environmental or economic disadvantage
 - f) Limited English proficiency

Rule out statements

Resources

1. Special Education Forms: <http://www.pattan.net/category/Legal/Forms>
2. Federal Law and Regulation: <http://www.pattan.net/category/Legal/Federal%20Law%20and%20Regulations>
3. PA Law and Regulations – Chapters 14 and 711: <http://www.pattan.net/category/Legal/PA%20Law%20and%20Regulations>
4. Side-by-Side Chapter 14/IDEA 2004: <http://pattan.net-website.s3.amazonaws.com/images/file/2011/08/15/sidebyside021209.pdf>
5. Chapter 14 Questions and Answers: http://www.pattan.net/category/Legal/PA%20Law%20and%20Regulations/page/Chapter_14_Questions_Answers.html
6. The Annotated Reevaluation Report webinar September 30, 2016 2:30 – 3:30 PM
7. The Annotated Evaluation and Reevaluation Report webinar from September 2016 will be archived on the PaTTAN web site www.pattan.net

Contact Information

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