EVALUATORS – EVALUATION PLAN

(Part B - 3 - 21)

Special Ed Evaluations must meet rigorous guidelines, but when an evaluation plan is drawn up, often you're not sure whether a student is headed for Special Ed, S504 accommodations, or neither.

This documentation will explain how to develop an evaluation plan for students age 3 – 21.
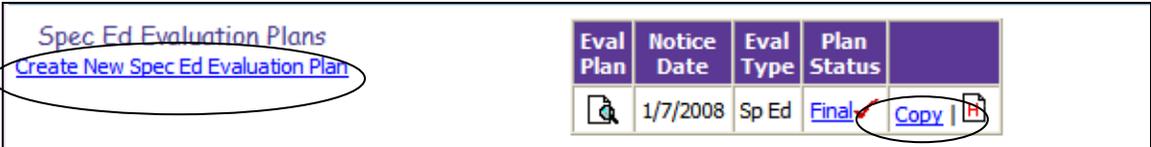
An Evaluation Plan document contains these five sections that must be completed before the document can be finalized:

       a. Evaluation Purpose
       b. Evaluation Areas
       c. Notification List
       d. Notice Detail Proposals or
       e. Notice Detail Refusals

__DUE PROCESS NOTE:__
Out-of-State-Transfer students must be evaluated to determine MN eligibility. It is considered an __INITIAL__ evaluation.

Evaluation Purpose

1.	Create a new evaluation plan or copy an existing evaluation plan	After the plan is created, the Evaluation/Reevaluation Plan page is displayed with information to be completed.
2.	The initial evaluation plan screen will display	Accept or change information. Click submit

Jane Doe
Student ID: 123-4567
School: **Mounds View High School**

Gender: **Female**
Grade: **07**
Curr Age: **12 yrs, 1 mos** (5/9/2000)

*Notice Date: 7/2/2012
*Evaluation Plan Status: Draft
*Language for this Evaluation Plan: English (011)

[Submit] [Reset] [Cancel]

3.	Click in the radio buttons and text boxes and fill in or change all of the required information for this plan. The '**Plan is For**' section is new and will determine what will be required during check completeness. For a Part B evaluation check the radio button 'Part B (Ages 3-21)' Keep in mind that the evaluation types displayed will depend on what evaluation types your district uses	The items labeled with red text and an asterisk (*) are required information that must be filled in if they're not already. If you don't know all of the information at this time, you may leave some of it blank, but you'll need to come back later and fill it in before you can finalize the plan.

Jane Doe   ID #: 123-4567
School: **Mounds View High School**
Type: **Reevaluation**

Grade: **07**
Eval Age: **12 yrs, 1 mos** (5/9/2000)
Notice Date: **7/2/2012**

*Notice Date: 7/2/2012
*Initial/Re-evaluation: ◉ Initial Evaluation
                         ○ Re-evaluation
*Plan is for: ◉ Part B (Ages 3-21)
               ○ Part C (Infant and Toddlers) *
               ○ Both Part B and Part C (all ages) *
*Evaluation Type: ◉ Comprehensive Special Education **
                   ○ Other Special Ed

*Evaluation Location: Mounds View High School
*Case Manager Name: 0621 Admin
*Case Manager Position: District Administrator
*Case Manager Phone: 000-000-0000
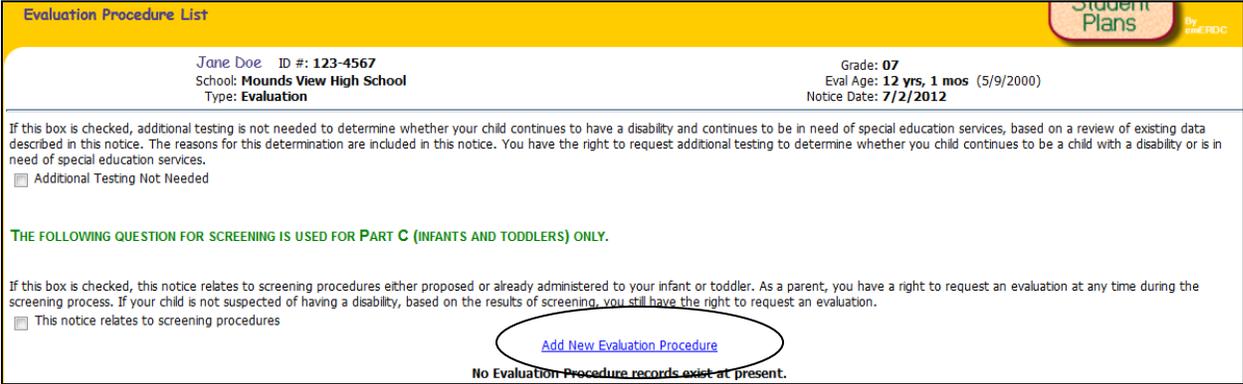Case Manager Email:

[Submit] [Reset]

* A separate Part C Prior Written Notice is required when the evaluation is for Part C (Infants and Toddlers) or both Part B and Part C

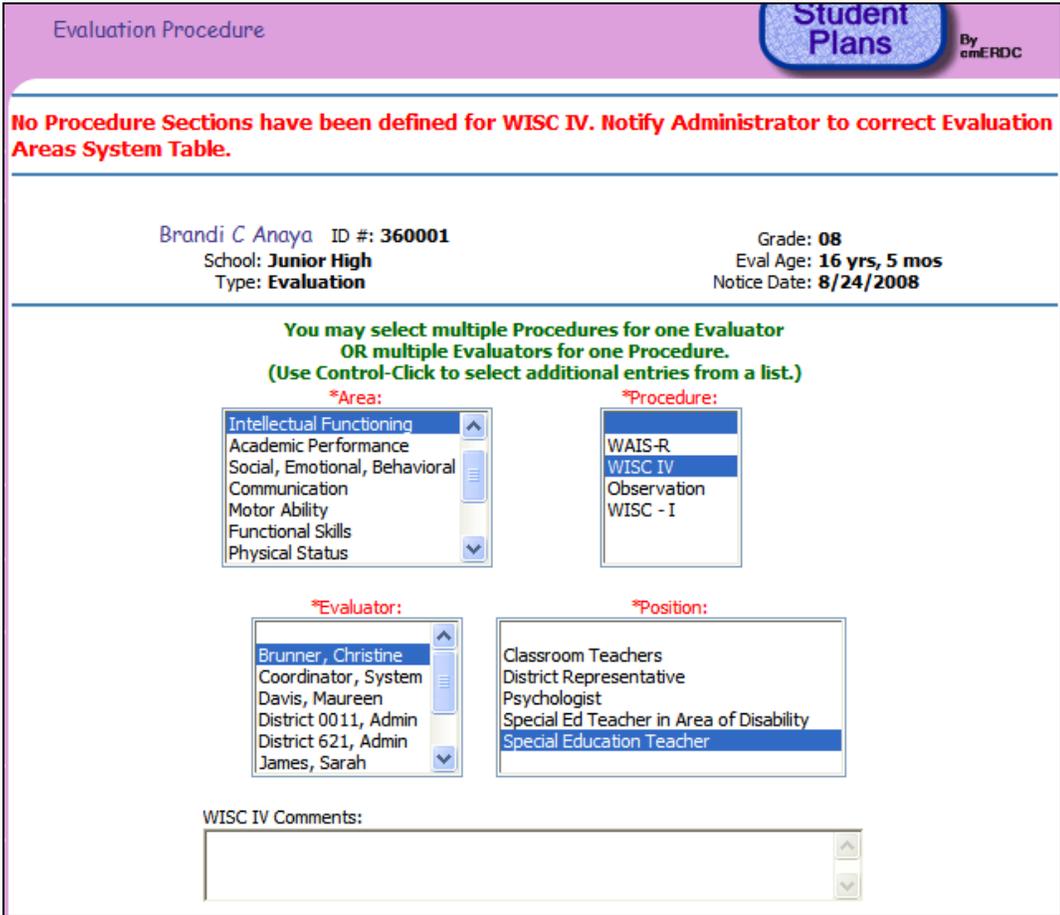** Qualifies as a comprehensive special ed evaluation for 3-year review

4.	Click the Submit button	A message is displayed indicating that the plan information was saved.

Evaluation Areas

In many cases, evaluations will be conducted by the Case Manager. In those cases, the Case manager can just fill in the appropriate information as necessary for the report. In some cases, however, the Case Manager will assign someone else (an Evaluator) to evaluate the student in certain areas. Evaluators must be defined as such in the system so that they are available for the Case Manager to assign.

1.	Click Evaluation Areas on the sidebar menu.	The Evaluation Procedure List screen is displayed.
2.	Click the Add New Evaluation Procedure link.	The Procedure selection page with the Area and the Procedures as defined by your district will display. Select the Procedure(s).

3.	Click on an item in the Area box to select it.	The list in the Procedure box is updated with the relevant items for the Area selected.
4.	Click on an item in the Procedure box to select it.	Additional fields may be displayed with information to be completed for some of the Procedures. Ctrl+click to select multiple Procedures.
5.	Click to select a name in the Evaluator box.	Select the person who will evaluate the procedure(s) currently selected. Alternatively, multiple Evaluators may be selected by (ctrl+click) on each Evaluator and then select a single procedure for all of them.
6.	Click to select a role in the Position box.	Select the role of the person selected in the Evaluator box.

7.	Click the Submit button	The page is redisplayed with a message that the data was successfully added.
8.	Repeat to include additional Evaluation Procedures as necessary.	If this error is displayed, shown in the next screenshot, please check with your local system administrator to correct the problem in system maintenance. Refer to system template maintenance documentation
9.		
10.	If the area is setup properly in system tables it will be accepted and this screen will display.	

Evaluation Procedure — Student Plans

Evaluation Area for Brandi C Anaya was successfully added. ←

Brandi C Anaya   ID #: **360001**
School: **Junior High**
Type: **Evaluation**

Grade: **08**
Eval Age: **16 yrs, 5 mos**
Notice Date: **8/24/2008**

You may select multiple Procedures for one Evaluator
OR multiple Evaluators for one Procedure.
(Use Control-Click to select additional entries from a list.)

*Area:
Intellectual Functioning
Academic Performance
Social, Emotional, Behavioral
Communication
Motor Ability
Functional Skills

*Procedure:

*Evaluator:
Brunner, Christine
Coordinator, System
Davis, Maureen
District 0011, Admin
District 621, Admin
James, Sarah

*Position:
Classroom Teachers
District Representative
Psychologist
Special Ed Teacher in Area of Disability
Special Education Teacher

11.	Click Evaluation Areas on the Menu Bar	The Evaluation Procedure List is displayed showing each of the Evaluation Procedures you just added. Notice that if you made multiple selections for either a Procedure or Evaluator, each is put in as a separate line in the table.
12.	Note that there is a box for 'Additional Testing Not Needed'. This is usually associated with a reevaluation where additional assessments are not required.	However, on a re-evaluation, at a minimum a record review is required.

Evaluation Procedure List — Student Plans

Jane Doe   ID #: 123-4567
School: Mounds View High School
Type: Evaluation

Grade: 07
Eval Age: 12 yrs, 1 mos (5/9/2000)
Notice Date: 7/2/2012

If this box is checked, additional testing is not needed to determine whether your child continues to have a disability and continues to be in need of special education services, based on a review of existing data described in this notice. The reasons for this determination are included in this notice. You have the right to request additional testing to determine whether you child continues to be a child with a disability or is in need of special education services.

☐ Additional Testing Not Needed

THE FOLLOWING QUESTION FOR SCREENING IS USED FOR PART C (INFANTS AND TODDLERS) ONLY.

If this box is checked, this notice relates to screening procedures either proposed or already administered to your infant or toddler. As a parent, you have a right to request an evaluation at any time during the screening process. If your child is not suspected of having a disability, based on the results of screening, you still have the right to request an evaluation.

☐ This notice relates to screening procedures

Add New Evaluation Procedure

No Evaluation Procedure records exist at present.

Notification List

1.	Click Notification List on Menu Bar	The Evaluation Notification List is displayed including the student and the Legal Guardian. The student's Legal Guardian must be included in the list before you can finalize the Evaluation Plan. If a Legal Guardian is not included in the list, please refer to the documentation on Guardians.
	Add Other Notification Include Case Manager Update Current Guardians 	

Name	Relationship	Type	Address	City	Phone		
George Administrator	Case Manager	Case Manager			111-2222	Edit	Delete
Bertha and Irving Doe	parents	Legal Guardian	777 Main	Arden Hills		Edit	Delete

2.	Click the Update Current Guardians link.	The Legal Guardians from the Student Guardians list are added to the list.
3.	Click the Include Case Manager link.	The Case Manager is added to the list.
4.	Click the Add Other Notification link.	The Evaluation Notification page is displayed. This is where you can add any other people to the list who should be notified about the plan.

	*Name: [ ]		
	Address: [ ]		
	City: Coon Rapids		
	State: MN		
	Zip: 55433-3799		
	Phone: [ ]		
	Alternate Phone: [ ]		
	*Relationship: [ ]		
	Submit Reset Cancel		

5.	Fill in the required information and click the Submit button.	The page is redisplayed with a message that the data was successfully added.
6.	On bottom portion of the Menu Bar, click Notification List.	The Evaluation Notification List is displayed showing all of the people you added.
7.	Legal Guardians are brought into Student Plans via the student information system. If a legal guardian needs to be added, add the guardian outside of the evaluation plan on the menu bar, Student Guardians	Click on update current guardians to bring the new guardian in on the Notification list

Add Other Notification
Include Case Manager
Update Current Guardians

Name	Relationship	Type	Address	City	Phone		
George Administrator	Case Manager	Case Manager			111-2222	Edit	Delete
Bertha and Irving Doe	parents	Legal Guardian	777 Main	Arden Hills		Edit	Delete
Grandma Doe	Guardian	Other Notice	123 Main Street	Coon Rapids		Edit	Delete

Evaluation Notice Detail Proposals

*DUE PROCESS NOTE:
There are specific requirements related to each of the questions below.
1. *Action Proposed: "The district proposes a COMPREHENSIVE evaluation to determine on-going needs related to XX" (be specific – for instance: reading comprehension, reading fluency, math fluency, written expression, on-task behaviors, organization, social skills).*
2. *Explanation of Why: "The district proposes these actions based on interventions related to XX and XX" OR "based on continued lack of growth as evidenced by AIMS data.*
3. *Description of Evaluation Procedures: "The district considered teacher and parent observations, district assessment data, intervention data, classroom observations, achievement, speech/language and intellectual assessment data."*
4. *Description of Other Options Considered: THERE ARE ALWAYS OTHER OPTIONS! You could consider a variety of assessment tools – WISC IV or SB5, Woodcock Johnson or WIAT, any number of speech assessments, OR file reviews of existing data. "The team considered administering the WJ4, however this was rejected as the student's current progress according to data collection provides adequate data to determine on-going needs."*
5. *Description of other Factors: Consider the child's medical status, if they are currently or just coming off medication, have a mental health condition, are of ELL status OR the parents speak another language.*

1.	On the Menu Bar, click the Evaluation Notice Detail Proposals. To pass completeness check **either** the proposals **or** the refusals must be entered	The proposals screen is displayed. Each of these fields is required. These statements can be modified in document section maintenance.

Evaluation Notice Detail Proposals

*Description of the action(s) proposed by the district:

* Explanation of why the district proposes to take the action:

*Description of each evaluation procedure, test, record, or report the district used as a basis for the proposed action:

*Description of other options that the IEP team considered and the reasons why those options were rejected:

*Description of other factors affecting the proposal:

2.	After entering data click submit	Select Notice Detail Refusals on menu sidebar if necessary

Notice Detail Refusals

DUE PROCESS NOTE:
This section should never be completed UNLESS you contact either Todd Travis or Wendy Van Batavia and receive guidance from them.

1.	To pass completeness check **either** the proposals **or** the refusals must be entered	Notice Detail Refusals screen is displayed. These statements can be modified in document section maintenance.
	Evaluation Notice Detail Refusals screen showing the following fields: *Description of the action(s) refused by the district:, *Explanation of why the district refuses to take the action:, *Description of each evaluation procedure, test, record or report the district used as a basis for the proposed action:, *Description of other options that the IEP team considered and the reasons why those options were rejected:, *Description of other factor affecting the refusal:	
2.	Perform completeness check	

Evaluation/Reevaluation Plan Completeness Check

Student Plans

Brandi C Anaya   ID #: **360001**
School: **Junior High**
Type: **Evaluation**

Grade: **08**
Eval Age: **16 yrs, 5 mos**
Notice Date: **8/24/2008**

		Section	Messages
Edit	✓	Student Information	Complete
Edit	✓	Evaluation Purpose	Complete
Edit	✓	Evaluation Areas	Complete: 1 Evaluation Procedure
Edit	✓	Notification List	Complete: 2 Legal Guardian Notifications and 1 other Notification
Edit	✓	Notice Detail Proposals	Warning only: No Proposal Details entered; OK, if Refusal details are entered.
Edit	✓	Notice Detail Refusals	Complete

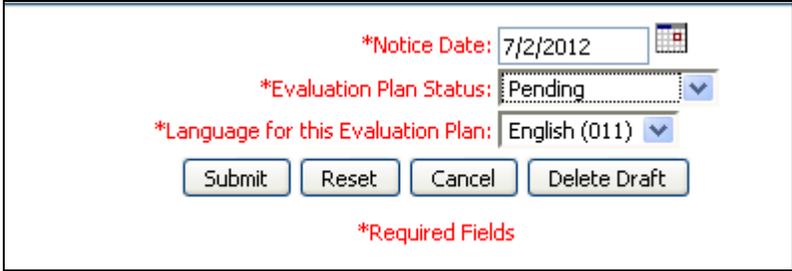**Congratulations! Everything checks out on this Evaluation Plan!**

You may now make this Evaluation Plan Pending if you wish.

3.	Click on Make Pending to finalize or not implement the evaluation plan	

Spec Ed Evaluation Plans
Create New Spec Ed Evaluation Plan

Eval Plan	Notice Date	Eval Type	Plan Status	
🔍	1/7/2008	Sp Ed	Pending ✓	Copy

Finalize the Evaluation Plan

1.	On the Menu Bar, click the Special Ed document group (whichever you are working with).	The Documents page is displayed showing the Evaluation Plan in Draft or Pending status.
2.	Click on Draft to put into Pending Mode	
3.	Click on Pending to change status to Final	Parent Consent/Objection screen will be displayed
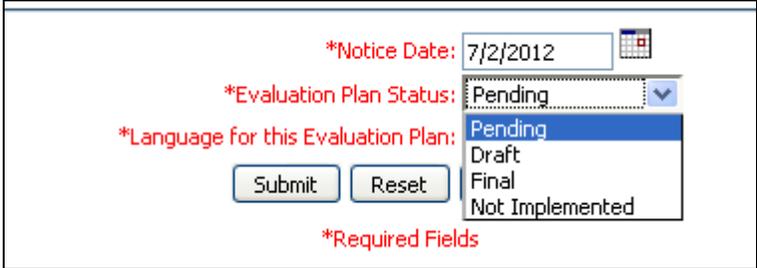
DUE PROCESS NOTE:
Until you FINALIZE the evaluation plan, no other evaluators will know you have received permission. Itinerant staff serve multiple districts and there are additional team evaluators who may be participating as well. They assess in the order evaluations are received. If you forget to make a document "Final" until a week before the due date, others likely will not be able to complete their tests in a timely fashion.

4.	Fill in this section accordingly. Legal Guardian Approval Once an Evaluation Plan has been created, you will need to note whether the legal guardian has given permission to proceed or not. Recording Parent Response to an Evaluation Plan MUST be done. When you record parent responses after the plan is finalized, the following occurs: • Student individual evaluation reports appears under My Evaluations for users who have been assigned as evaluators. • A new Evaluation Report is generated • Evaluation plans can be amended after the plan is finalized and the report is still in draft mode	When date is entered for evaluation report due date, the individual report date will automatically be entered as the same date but it can be edited. Typically, the individual report date is 2 weeks earlier so that the individual reports get done on time and the case manager has time to pull the report together.

DUE PROCESS NOTE:
In the box above, where you enter parent permission information, look below that to the Evaluation Report Due Date and Individual Reports Due Date boxes. The eval due date is the 30 day date. The individual report due date allows the case manager to set some parameters – however this must be VERY NARROW. You may require the individual reports to become due 1-2 days early for most evaluations. HOWEVER, there may be circumstances that require a couple more days – in which case you need to consult with the team evaluators to make this determination.

Amending an Evaluation Plan

Sometimes after the Evaluation Plan has been finalized but the Evaluation Report is still in draft mode, the team decides they need additional testing. They want this additional testing to be completed within the original evaluation timeline (30 school days for 3 years old – 21 years old and 45 days birth – 2 years old). The case manager will need to Amend the Evaluation Plan to add the additional procedures.

1. Click on **Amend** for the Evaluation Plan that is finalized.	<table><tr><th>Eval Plan</th><th>Notice Date</th><th>Eval Type</th><th>Plan Status</th><th></th></tr><tr><td>🔍</td><td>11/5/2009</td><td>Sp Ed</td><td>Final✓</td><td>Copy | Amend</td></tr></table>
2. This *Evaluation Plan* screen will appear.	
*Notice Date: 11/5/2009 🗓 *Evaluation Plan Status: Draft ▾ **This is an Amended Evaluation Plan.** Original Notice Date: 11/5/2009 Original Evaluation Report Due Date: 11/12/2009 Original Individual Reports Due Date: 11/12/2009 [Submit] [Reset] [Cancel] *Required Fields	
3. Change the **Notice Date** if necessary.	
4. Leave the **Evaluation Plan Status** in **Draft.** Click on **Submit.** This will create a second evaluation plan with the same due dates as the original Evaluation Plan.	
5. The *Evaluation/Reevaluation Plan Information* screen appears.	

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6. If necessary change any information. **Note:** you can not change the **Initial/Re-evaluation** or **Evaluation Type** fields; they stay the same as the original Evaluation Plan.

7. Click on the **Submit** button.

8. Click on **Evaluation Areas** on the menu bar.

9. The *Evaluation Procedure List* screen will appear.

10. Click on **add New Evaluation Procedure**

11. The *Evaluation Procedure* screen appears.

You may select multiple Procedures for one Evaluator
OR multiple Evaluators for one Procedure.
(Use Control-Click to select additional entries from a list.)

Step	Description
12.	Only the <u>new</u> procedure(s) will be added to this new Evaluation Plan. Click on the down arrow and highlight an **Area**.
13.	Click on the down arrow and highlight a **Procedure**. If one person is going to complete more than one procedure highlight the first procedure, hold the **Ctrl. Key (PC)** down on the keyboard, and then click on the next procedure.
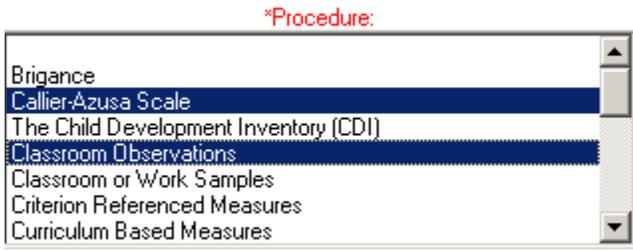
Step	Description
14.	Click on the down arrow and highlight an **Evaluator**. If more than one person is going to complete the same procedure highlight the first evaluator, hold the **Ctrl. Key (PC)** down on the keyboard, and then click on the next evaluator.

Step	Description
15.	Click on the down arrow and highlight a **Position** for the evaluator.
16.	Once a Procedure is selected, a **Comment** field is created for each procedure. If you need to further explain the test, type in the comments here.

TEMA Comments:

Step	Description
17.	Click on the **Submit** button.
18.	Continue to add more **Areas**, **Procedures**, **Evaluators** and **Positions** as necessary.
19.	Click on **Evaluation Areas** on the menu bar. The *Evaluation Procedure List* screen appears again with the list of **Procedures** added.

Evaluation Procedure List Add New Evaluation Procedure

Area	Procedure	Evaluator	Position		
Academic Performance	Classroom Observations	Becky Mullaly	DCD Consult	Edit	Delete
Social, Emotional, Behavioral	Adolescent Questionnaire	Portia Andrews	School Psychologist	Edit	Delete

20. Click on **Proposals** on the menu bar.

21. The *Proposals* screen will appear and answer the 5 questions as to why you are proposing the amendment.

Evaluation Notice Detail Proposals

*Description of the action(s) proposed by the district:

* Explanation of why the district proposes to take the action:

*Description of each evaluation procedure, test, record, or report the district used as a basis for the proposed action:

*Description of other options that the IEP team considered and the reasons why those options were rejected:

*Description of other factors affecting the proposal:

22. Click on **Check Completeness** on the menu bar. **Check Completeness** verifies that all required information has been completed.

23. The Evaluation/Reevaluation Plan Completeness Check screen will appear.

		Section	Messages
Edit	✓	Student Information	Complete
Edit	✓	Evaluation Purpose	Complete
Edit	✓	Evaluation Areas	Warning only: No Evaluation Procedures have been selected.
Edit	✓	Notification List	Complete: 2 Legal Guardian Notifications and 1 other Notification
Edit	✓	Proposals	Complete
Edit	✓	Refusals	Warning only: No Refusal Details entered; OK, if Proposal details are entered.

Congratulations! Everything checks out on this Evaluation Plan!

You may now make this Evaluation Plan Pending if you wish.

Make Pending
Not Yet

24. The red check shows that all mandatory fields in each section are completed. If a red

	check is missing, click on Edit to return to that section.
25.	Click on the Make **Pending** button. Finalizing this document does the following: ○ The form is changed from **Draft** to **Pending**. ○ The **Edit** option is gone and is replaced with a **Print** icon. ○ **Delete** is no longer an option. ○ You can **Copy** the form to assist with creating a new document. | Eval Plan	Notice Date	Eval Type	Plan Status	
---	---	---	---	---
	8/14/2009	Sp Ed	Pending✓	Copy	
26.	This evaluation plan will be sent home for a signature and finalized the same as regular Evaluation Plans. **This testing will need to be completed with the original Evaluation Plan's timeline.** This new evaluation procedure will automatically be added to the current evaluation report that is in draft.