Evaluation (Massachusetts)

Last Modified on 10/21/2024 8:22 am CDT

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Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and the student's determination of eligibility for special education. This document describes each editor, the section(s) of the print format that include the entered information, a description of each field on the editor, and any special considerations and instructions for using the editor and fields.

An evaluation must be created whether or not the student is determined to have a disability. A copy of the evaluation summary report, including the documentation of eligibility, is given to the student's parents by the school district.

> The current format of this document is the **MA ESR 2023**. Evaluation formats are selected in Eval Types.

Editor Home

Editor Home

The Editor Home lists the editors available, their status, and Modification and Completion information.

Header	Description
Name	The name of the editor.
Status	The state of the editor. Statuses can be: • **In Progress** indicates a user has entered and saved data in that editor. • **Not Started** is the default status for all editors. • **Complete** indicates a user has clicked the Complete button on the editor, and the editor is read-only. This does not lock the editor from further editing but indicates the user considers the editor finished. • **Not Needed** indicates a user has clicked the **Not Needed** button on the editor. This is usually done for editors that do not apply to the student. The following statuses are only available for certain state-specific documents: • **ESign** indicates that the editor has functionality related to the eSignature process. See the Nevada Individual Education Plan eSignature Process or Delaware Special Ed Plan eSignature Process articles for additional information. • **Complete Pending eSignature** indicates the plan has been entered and sent via the Campus Parent portal to the student's guardian for eSignature.
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the **Complete** button for that editor.

General Information

The following table lists the actions available for the editors. When resizing the window, certain buttons are condensed into a single **Action** button.

Button	Description
Save	Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor. • **Save** captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • **Save & Stay** captures progress and keeps the user on the current editor. This save button is the default save option and is usually found within the detail screen or list editors, such as Goals and Objectives. • **Save & Next** captures progress and navigates the user to the next editor. • **Save & New** captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Type section for additional information.

Button	Description
Refresh	Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted records. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes. A side panel displays a listing of all the student's applicable enrollment records. See the Enrollments tool documentation for additional information.
Cancel	Navigates the user to the Editor Home screen or the List Screen for List editors.
Status	Changes the status of the editor. • **Complete** indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. The user must click **In Progress** to further edit after an editor is marked Complete**.** • **Not Needed** indicates the editor does not apply to the student's plan or evaluation. This makes the editor read-only. However, this does not lock the editor from further editing. Click the **In Progress** button to further edit after an editor is marked Not Needed. • **In Progress** only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made. The following status is only available for the Nevada IEP: • **Complete Pending eSignature** only displays for the Procedural Safeguards, IEP Implementation, and Medicaid Consent editors. This button marks the editor as complete until the parent/guardian electronically signs those sections of the plan via the Campus Parent Portal. See the Nevada Individual Education Plan eSignature Process or Delaware Special Ed Plan eSignature Process articles for additional information.
Print	Prints the entire document.
Editors	Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click **Close** to collapse the side panel.
Previous	Navigates the user to the previous editor.
Next	Navigates the user to the next editor.

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor is displayed. List editors display a list of all records within that editor. Clicking an existing record or the **New** button opens the detail view for an individual record.

Editor Lock Out and Release Logic

Only one user at a time can actively work on an editor. A person with a padlock icon ( ) displays in the Editors side panel, Editor Home, and List Screen of list editors indicating which editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

Editors that are currently being edited are read-only for all other users. The name of the person working on the editor displays in the header.

To release an editor, the user must:

- navigate to the next editor by clicking **Save and Next** or the **Editors** button and selecting the next editor from the side panel.
- click the **Cancel** button to return to the Editor Home screen.
- log out of the Campus application.
- navigate to a different tool in the Campus application.

Editors are automatically released when the in-application timeout limit has been exceeded. This is a back-end process and is usually around 30-60 minutes.

Template Banks

Certain fields within several editors have an **Add Template** icon that displays next to their name. Clicking this button displays a side panel with the available library of predetermined text for that field. Template Banks are managed in System Administration.

Template Bank Side Panel

Click the plus (+) icons next to the category to view the available template values.

Expanded Category and Values Selected

Template Bank Categories display on the left and the selected text displays on the right. Click the **Add** button to add the template value. This adds the template to the queue of values on the right. The red **X** removes selected templates while the sequence field can be used to reorder the templates. Another option is to use the up and down arrows next to the sequence field to reorder values.

Click **Cancel** to go back to the document. The **Clear Selected Template(s)** button removes all selected template values from the right selection screen.

Once selections are finalized, click the **Insert Selected Template(s)** button to add the values to the field within the document in the selected order. Template values are separated by carriage returns.

Example Template Bank Selections in the Document

Text Editors

Images should not be inserted into text fields.

Editors

Evaluation Information | Enrollment Information | Student Information | Parent/Guardian Information | SLD: Component 1 | SLD: Component 2 | SLD: Component 3-4 | SLD: Determination | Eligibility Determination | Team Meeting | Consent

Evaluation Information

The Evaluation Header editor lists general information about the Evaluation, including relevant dates.

> This editor cannot be placed in a NOT NEEDED status.

Evaluation Information Editor

▸ Click here to expand...

Field	Description	Validation
Meeting Type *Required*	The type of meeting. Options include: - Initial Evaluation - Re-Convene - Reevaluation - Placement - Three Year Reevaluation	Multiple selections can be made.
Meeting Date *Required*	The day of the meeting.	This field auto-populates with the date evaluation was created.

Field	Description	Validation
Referral Date *Required*	The day of referral.	N/A
Consent Sent	The day consent was asked.	N/A
Consent Received	The day consent was received.	N/A

Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

Enrollment Information Editor

▶ Click here to expand...

Field	Description	Validation
Enrollment Information *Click Refresh to retrieve a new copy of data from a selected Enrollment record.*		
Grade	The student's grade level.	This field auto-populates from the selected Enrollment record upon Refresh.
Assigned School Information (Complete after a placement has been made)		

Field	Description	Validation
School Name	The name of the school associated with the student's Enrollment record.	This field auto-populates from the selected Enrollment record upon Refresh.
School Phone	The phone number of the school associated with the student's Enrollment record.	This field auto-populates from the selected Enrollment record upon Refresh.
School Address	The address of the school associated with the student's Enrollment record.	This field auto-populates from the selected Enrollment record upon Refresh.
Cost-Shared Placement	Indicates this school is a cost-shared location. Options are Yes or No.	N/A
Specify Agency *Required*	The agency associated with the placement.	*This field is available and required when Yes is selected from Cost Shared Placement field.
District Information The fields below are read-only.		
District Number	The district number associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > State District Number).
District Name	The district name associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > Name).
District Address	The district address associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > Address).
District Phone	The district phone number associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > Phone).

Field	Description	Validation
District SPED Address	The district special education address associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > District SPED Address).
District SPED Phone	The district special education phone associated with the Enrolled school.	This field auto-populates from the selected Enrollment record upon Refresh (District Information > District SPED Phone).

Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

> The **Refresh** button retrieves a fresh copy of data from the student's record from Census. See the General Information section for additional information.
>
> This editor cannot be placed in a Not Needed status.

Student Information Editor

▶ Click here to expand...

Field	Description	Validation
Last Name	The student's last name.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Last Name identity.lastName
First Name	The student's first name.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > First Name identity.firstName
Middle Name	The student's middle name.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Suffix Name identity.suffix
Age	The student's age.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.
Birthdate	The student's date of birth.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Birth Date identity.birthDate

Field	Description	Validation
Gender	The student's gender.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Gender identity.gender
Student Language	The student's home primary language.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Language At Home identity.homePrimaryLanguage
Language of Instruction *Required*	The language the student is to receive instruction.	The values available in this dropdown are populated from the Attribute Dictionary > Definition > ISO Language List.
Address	The student's address. This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.	Household Address Information tool address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
LASID	The student's local ID number.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > Student Number identity.studentNumber
SASID	The student's state ID number.	This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked. Demographics > State ID Number

Field	Description	Validation
If 18 or older	The student's decision making determination when they are 18 years old or older. Options include: • Acting on Own Behalf • Shared Decision Making • Delegate Decision Making	N/A
Specify Court Appointed Guardian	The name of the court appointed guardian of the student.	N/A
Case Manager Information		
Name	The name of the student's case manager.	This field auto-populates with active Case Manager Name from Team Members tool. Special Ed Team Members > Name teamMember.firstName teamMember.lastName
Title	The role of the student's case manager.	This field auto-populates with active Case Manager Title from Team Members tool. Special Ed Team Members > Title teamMember.title
Phone	The phone number of the case manager.	This field auto-populates with active Case Manager Work Phone from Team Members tool. Special Ed Team Members > Work Phone

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Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's Relationships tool. The editor includes Demographics information for the student's guardian.

The **Remove** button next to each parent/guardian can be used to remove a parent/guardian

from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

This editor cannot be placed in a Not Needed status.

Parent/Guardian Information Editor

▶ Click here to expand...

Field	Description	Validation
Last Name	The last name of the parent/guardian.	This is part of the header for the guardian. Demographics > Last Name identity.lastName
First Name	The first name of the parent/guardian.	This is part of the header for the guardian. Demographics > First Name identity.firstName

Field	Description	Validation
Middle Name	The suffix of the parent/guardian.	This is part of the header for the guardian. Demographics > Middle Name identity.middleName
Suffix	The suffix of the parent/guardian.	This is part of the header for the guardian. Demographics > Suffix identity.suffix
Relationship	The relationship between the student and guardian.	This is part of the header for the guardian. Relationships > Relationships planGuardian.relationship
Print Sequence	The print order of the parent/guardian(s) on the IEP.	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, parent/guardian(s) with a sequence number print in the order defined, then un-sequenced parent/guardian(s) print at the bottom.
Legal Guardian	Indicates this person is the student's legal guardian. Options are Yes or No.	N/A
Address	The address of the guardian's home. When multiple addresses exist, this field becomes a dropdown selection.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Households Information > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip

Field	Description	Validation
Home Phone	The home phone number of the guardian.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Households Information > Household Phone & Address(es) > Phone contact.homePhone
Work Phone	The work phone number of the guardian.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Demographics > Personal Contact Information > Work Phone contact.workPhone
Cell Phone	The cell phone number of the guardian.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Demographics > Personal Contact Information > Cell Phone contact.cellPhone
Email	The email address of the guardian.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Demographics > Personal Contact Information > Email contact.email

Field	Description	Validation
Home Primary Language	The language spoken at the guardian's home.	This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked. Demographics > Person Information > Home Language identity.homePrimaryLanguage
Parent Preferred Mode of Communication	The manner in which the parent/guardian wants to be communicated. Options include: • Phone • Email • Messaging App • Other	N/A
Specify Other *Required*	The other manner of communication.	*This field is available and required when Other is selected as the Parent Preferred Mode of Communication field.

SLD: Component 1

The SLD: Component 1 editor includes a review of the student's previous education, Participation Skills assessed, Performance History considered, and relevant Medical Information.

SLD: Component 1 Editor

▸ Click here to expand...

Field	Description	Validation
Have the above requirements been met?	Indicates the above requirements were met. Options include: • Yes, both A and B have been met • Some, but not all of the requirements in A and B have been met. The Team must determine what additional information is needed and how they will obtain the information within the evaluation timeframe. See SLD TA 3. • No, the requirements have not been met and therefore the referral for special education evaluation should not go forward until the school has sufficient information to determine that the student has been given appropriate opportunities to learn in the general education environment. See SLD TA 4.	Only one option can be selected.
Participation Skills		

Field	Description	Validation
Assessments of the student's attention skills, memory, and social relations with groups, peers, and adults have been collected	Indicates assessments of the student's attention skills, memory, and social relations have been collected.	N/A
Performance History		
Supporting evidence shows that the student has	Options include: • consistently performed within the range of performance of same-aged peers; or • consistently performed better than same-aged peers; or • consistently performed less well than same-aged peers; or • demonstrated inconsistent performance throughout his/her educational history	Only one option can be selected.
Medical Information	Options include: • Educationally relevant medical findings are noted • N/A	N/A
Findings	A description of the findings.	N/A

SLD: Component 2

The SLD: Component 2 editor describes the method used to determine eligibility.

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SLD: Component 2 (NOT STARTED)   Editor 6 of 11

Method of determination
☑ A. If using a scientific, research-based intervention as an eligibility determination procedure, check this box.
☐ B. If using the IQ/achievement discrepancy model as an eligibility determination procedure, check this box.

A1. Based on assessment data*, the student is not making effective educational progress for his/her age or to meet ELA or Math Curriculum Framework standards when using a process based on the student's response to scientific, research-based intervention in one or more of the following areas

☐ Oral Expression   ☐ Written Expression
☐ Basic Reading Skills   ☐ Reading Comprehension
☐ Reading Fluency Skills   ☐ Listening Comprehension
☐ Mathematics Problem Solving   ☐ Mathematics Calculation

*Assessment data includes classroom performance information as well as data related to visual and auditory processing of information

A2. Has the scientific, research-based intervention method that was implemented provided sufficient information so that a responsive, data-driven IEP can be developed for the student?

☐ Yes, sufficient evidence exists regarding how the student learns and what is impeding learning so that a responsive, data-driven IEP can be developed

☐ No (If no, attach additional diagnostic assessments that will determine how the student learns and what is impeding learning, that will assist in the writing of a responsive, data-driven IEP and designing specialized instruction based on the student's needs.)

A3. Attach documentation of the instructional strategies used and the student-centered data collected that shows evidence that
- the student has been instructed using research-based instructional strategies;
- repeated, student-centered assessment data has been collected at reasonable intervals; and
- the student's parents have been notified regarding the amount and nature of assessment data that is collected based on the student's instruction and academic progress, strategies implemented to increase the student's learning, and the parent's right to request an evaluation.

SLD: Component 2 Editor

▶ Click here to expand...

Field	Description	Validation
SLD: Component 2		
Method of Determination	The method of determination. Options include: • A. If using a scientific, research-based intervention as an eligibility determination procedure, check this box. • B. If using the IQ/achievement discrepancy model as an eligibility determination procedure, check this box.	Only one option can be selected.
The following fields display when A is selected from Method of Determination.		

Field	Description	Validation
A1. Based on assessment data*, the student is not making effective educational progress for his/her age or to meet ELA or Math Curriculum Framework standards when using a process based on the student's response to scientific, research-based intervention in one or more of the following areas	Options include: - Oral Expression - Basic Reading Skills - Reading Fluency Skills - Mathematics Problem Solving - Written Expression - Reading Comprehension - Listening Comprehension - Mathematics Calculation	Multiple options can be selected.
A2. Has the scientific, research-based intervention method that was implemented provided sufficient information so that a responsive, data-driven IEP can be developed for the student?	Options include - Yes, sufficient evidence exists regarding how the student learns and what is impeding learning so that a responsive, data-driven IEP can be developed - No (If no, attach additional diagnostic assessments that will determine how the student learns and what is impeding learning, that will assist in the writing of a responsive, data-driven IEP and designing specialized instruction based on the student's needs.)	Only one option can be selected.
The following fields display when B is selected from Method of Determination.		

Field	Description	Validation
B1. Based on a finding of a severe discrepancy between IQ and achievement, the student exhibits a pattern of strengths and weaknesses in performance, achievement or both, relative to age or ELA or Math Curriculum Framework standards, or intellectual development, in the areas of	Options include: • Oral Expression • Basic Reading Skills • Reading Fluency Skills • Mathematics Problem Solving • Written Expression • Reading Comprehension • Listening Comprehension • Mathematics Calculation	Multiple options can be selected.
B2. Technically sound instruments have been used that assess cognitive and behavioral factors as well as physical or developmental factors	Options are Yes or No.	N/A
B3. More than one measure or assessment has been implemented	Options are Yes or No.	N/A

SLD: Component 3-4

The SLD: Component 3-4 editor includes other considerations that should be addressed when determining eligibility.

SLD: Component 3-4 Editor

▶ Click here to expand...

Field	Description
SLD: Component 3-4	
Is the student's lack of sufficient progress in the area of concern due primarily to cultural factors?	Options are Yes or No.
Is the student's lack of sufficient progress in the area of concern due primarily to an environmental or economic disadvantage?	Options are Yes or No.
Is the student's lack of sufficient progress in the area of concern due primarily to limited English proficiency?	Options are Yes or No.
Is the student's lack of sufficient progress in the area of concern due primarily to a visual, hearing, or motor disability?	Options are Yes or No.
Is the student's lack of sufficient progress in the area of concern due primarily to intellectual disability?	Options are Yes or No.
Is the student's lack of sufficient progress in the area of concern due primarily to an emotional disturbance?	Options are Yes or No.
Component 4	
Relevant behavior has been observed and the relationship of that behavior to the student's academic functioning has been noted.	Indicates behavior has been observed and how it impacts the student's academics has been noted.

SLD: Determination

The SLD: Determination editor indicates if the team has identified the student as eligible for special education services as a result of the observations of the previous editors.

SLD: Determination Editor

Eligibility Determination

The Eligibility Determination expands on the student's eligibility, including identifying the student's primary disability and the date of determination.

Eligibility Determination Editor

▶ Click here to expand...

Field	Description	Validation
Eligibility Determination		

Field	Description	Validation
Does the student have one or more of the following types of disability?	Options are Yes or No.	N/A
Specify Disability(ies)	The student's disability(ies). Options include: - Autism - Developmental Delay - Intellectual - Sensory/Hearing - Sensory/Vision - Sensory/Deaf-Blind - Neurological - Emotional - Communication - Physical - Specific Learning - Health	Multiple options can be selected.
2a. Is the student making effective progress in the general education program? In the case of a three-year reevaluation, would the student continue to make effective progress in the general education program without special education services?	Options are Yes or No.	N/A
2b. Is the lack of progress the result of the student's disability?	Options are Yes or No.	N/A
2c. Does the student require special education and/or related services to make effective progress or to access the general education curriculum.	Options are Yes or No.	N/A
Is parent satisfied with school evaluation?	Options are Yes or No.	N/A
Key Evaluation Finding and/or Next Steps	A description of findings and/or next steps.	This field is limited to 8000 characters.

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Team Meeting

The Team Meeting editor lists the team members who were in attendance for this evaluation and whether those members agreed with the decision reached.

🔒	Meeting Date ↓	Meeting Time	Meeting Purpose	Print In Evaluation
	09/04/23	3:00 PM	'Eligibility Determination/Eligibility Reevaluation'	ON

1 - 1 of 1 items

Team Meeting List Screen

▸ Click here to expand...

Team Meeting List Screen

Column Name	Description
Padlock Icon	The user currently editing the record.
Meeting Date	The day of the meeting.
Meeting Time	The time of the meeting.
Meeting Purpose	The purpose of the meeting.
Print in Evaluation	Indicates this record prints in the plan.

Team Meeting Detail Screen

Select an existing record or click **New** to view the detail screen.

Team Meeting Detail Screen

Field	Description	Validation
Team Meeting: <Date>		
Print in Eval	Indicates this record prints in the plan.	This defaults to marked.
Meeting Date *Required*	The day of the meeting.	N/A
Meeting Time	The time of the meeting.	N/A
Meeting Location	The location of the meeting.	N/A
Invite Date	The date the invitation to the meeting was sent.	N/A
Purpose of Meeting *Required*	The purpose of the meeting. Options include: • Eligibility Determination/Eligibility Reevaluation • IEP Development • Placement • Transition • Other	N/A
Specify Other *Required*	The other purpose of the meeting.	*This field is available and required when Other is selected from Purpose of Meeting.

Field	Description	Validation
Comments	Any comments related to the meeting.	This field is limited to 8000 characters.
Attendance		
First Name *Required*	The person's first name.	This field is read-only when the name pulls in from the Team Members tool when the Refresh button is clicked. Displays as a text field when the user manually enters the Team Member using the Add button.
Last Name *Required*	The person's last name.	This field is read-only when the name pulls in from the Team Members tool when the Refresh button is clicked. Displays as a text field when the user manually enters the Team Member using the Add button.
Role Name	The person's role.	N/A
Invited	Indicates the person has been invited.	When Invited is marked, the team member displays on the printed document.
Accepted	Indicates the person accepts the determination of the team.	N/A
Rejected	Indicates the person rejects the determination of the team.	N/A
Stay Put	Indicates the person does not agree with the evaluation decision and the evaluation should be placed in a holding status until mediation steps take place to resolve the issue.	N/A

Consent

The Consent editor indicates the assessment tools and strategies used to gather the information that determines the educational needs of the student.

Evaluation Consent Form (N1A) Editor

▶ Click here to expand...

Field	Description	Validation
Are the following assessments recommended?		
Assessment in All Areas Related to the Suspected Disability(ies)	Options are Yes or No.	N/A
List recommended assessment(s)	A description of the recommended assessment.	This field is limited to 8000 characters.
Educational Assessment	Options are Yes or No.	N/A
Observation of the Student	Options are Yes or No.	N/A
Health Assessment	Options are Yes or No.	N/A
Psychological Assessment	Options are Yes or No.	N/A
Home Assessment	Options are Yes or No.	N/A

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