

Evaluation (Massachusetts)

Last Modified on 06/27/2025 10:34 am CDT

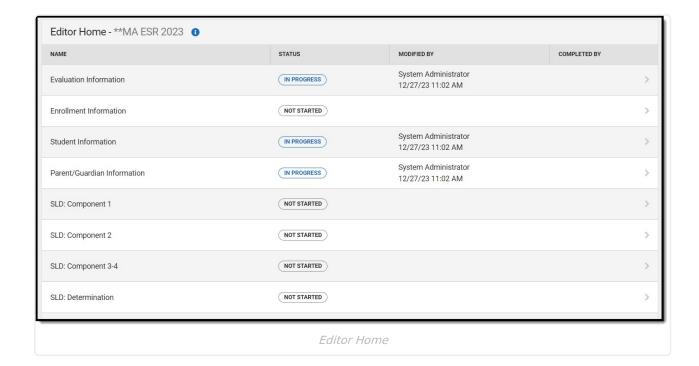
Evaluation Information | Enrollment Information | Student Information | Parent/Guardian Information | SLD: Component 1 | SLD: Component 2 | SLD: Component 3-4 | SLD: Determination | Eligibility Determination | Team Meeting | Consent

Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and determine eligibility for special education. This document describes each editor, the section(s) of the print format that includes 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. The school district gives a copy of the evaluation summary report, including the documentation of eligibility, to the student's parents. For information on general functionality, navigation, and additional plan and evaluation features, see the core <u>Plan and Evaluation</u> Information article.

The current format of this document is the **MA ESR 2025**. Evaluation formats are selected in **Eval Types**.



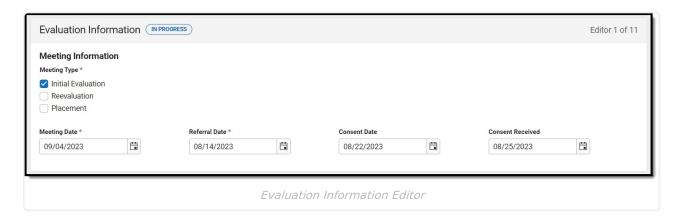
Evaluation Information

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



dates.

This editor cannot be placed in a NOT NEEDED status.



▶ Click here to expand...

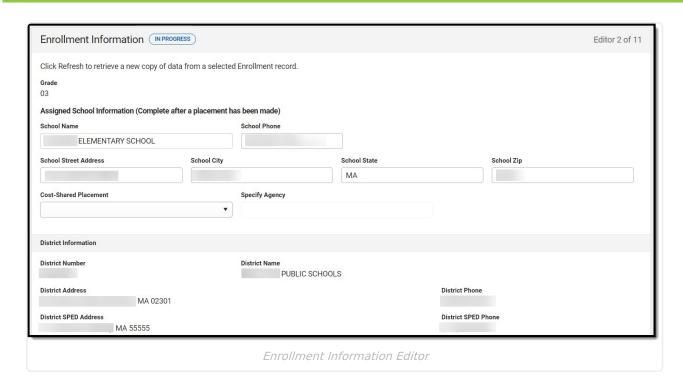
Field	Description	Validation
Meeting Type Required	The type of meeting. Options include: Initial Evaluation Re-Convene Reevaluation Placement Three Year Reevaluation	Multiple selections can be made.
Meeting Date Required	The day of the meeting.	This field auto-populates with the date evaluation was created.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

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Enrollment Information

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





Field	Description	Validation
Enrollment Info	ormation retrieve a new copy of data from a selecte	d Enrollment record.
Grade	The student's grade level.	This field auto-populates from the selected Enrollment record upon Refresh.
Assigned School	ol Information (Complete after a place	ement has been made)
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.



Field	Description	Validation			
	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).			
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).			

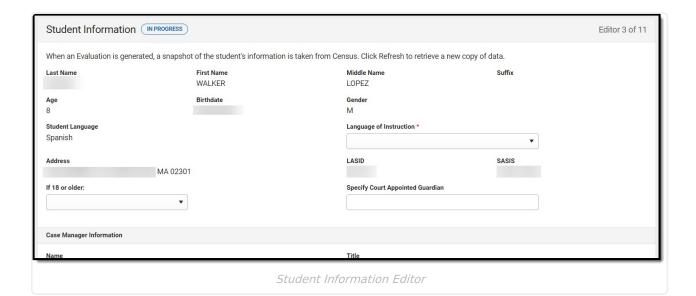
Student Information

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 <u>General Information</u> section for additional information.

This editor cannot be placed in a Not Needed status.



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



Field	Description	Validation
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
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



Field	Description	Validation
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
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



Field	Description	Validation
Specify Court Appointed Guardian	The name of the court appointed guardian of the student.	N/A
Case Manager Info	ormation	
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

Parent/Guardian Information

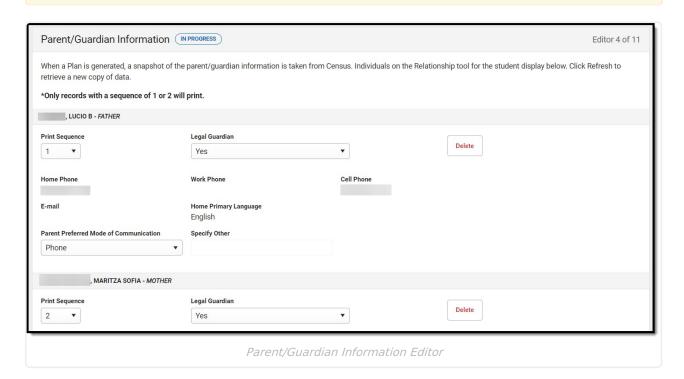
The Parent/Guardian Information editor populates based on the guardian checkbox on the student's <u>Relationships</u> tool. The editor includes <u>Demographics</u> information for the student's guardian.

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.





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
Middle Name	The suffix of the parent/guardian.	This is part of the header for the guardian.
		Demographics > Middle Name
		identity.middleName



Field	Description	Validation
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.



When evaluating a student for Specific Learning Disability, the Team must ensure that the student's underachievement is not due to lack of appropriate instruction in reading or math. Therefore, the Team has considered that: A. the student has been provided appropriate instruction in general education settings and that instruction has been delivered by qualified personnel; B. there is data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the student's progress and this documentation was provided to the student's parents. Have the above requirements been met? 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. Participation Skills Assessments of the student's attention skills, memory, and social relations with groups, peers, and adults have been collected Performance History Supporting evidence shows that the student has consistently performed better than same-aged peers; or consistently performed less well than same-aged peers; or consistently performed less well than same-aged peers; or demonstrated inconsistent performance throughout his/her educational history Medical Information Educationally relevant medical findings are noted.	SLD: Component 1 NOT STARTED	Editor 5 of 11
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. Participation Skills Assessments of the student's attention skills, memory, and social relations with groups, peers, and adults have been collected Performance History Supporting evidence shows that the student has consistently performed within the range of performance of same-aged peers; or consistently performed less well than same-aged peers; or demonstrated inconsistent performance throughout his/her educational history Medical Information Educationally relevant medical findings are noted.	When evaluating a student for Specific Learning Disability, the Team must ensure that the student's underachievement is not due to lack of appropriate instruction in math. Therefore, the Team has considered that: A. the student has been provided appropriate instruction in general education settings and that instruction has been delivered by qualified personnel; B. there is data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of the student's progress and the stud	, and the second
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. Participation Skills Assessments of the student's attention skills, memory, and social relations with groups, peers, and adults have been collected Performance History Supporting evidence shows that the student has consistently performed within the range of performance of same-aged peers; or consistently performed better than same-aged peers; or demonstrated inconsistent performance throughout his/her educational history Medical Information Educationally relevant medical findings are noted.	Have the above requirements been met?	
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Supporting evidence shows that the student has 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 Medical Information Educationally relevant medical findings are noted.		
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demonstrated inconsistent performance throughout his/her educational history Medical Information Educationally relevant medical findings are noted.	consistently performed better than same-aged peers; or	
Medical Information Educationally relevant medical findings are noted.		
Educationally relevant medical findings are noted.	demonstrated inconsistent performance throughout his/her educational history	
	Educationally relevant medical findings are noted.	

SLD: Component 1 Editor

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 Histor	у	
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.



SLD: Component 2 (NOT STARTED)		Editor 6 of 11
B. If using the IQ/achievement discrepance A1. Based on assessment data*, the student is not m response to scientific, research-based intervention in Oral Expression Basic Reading Skills	Written Expression Reading Comprehension	dards when using a process based on the student's
Reading Fluency Skills Mathematics Problem Solving	Listening Comprehension 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	

Field	Description	Validation		
SLD: Component 2	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, datadriven 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.) 	Only one option can be selected.

The following fields display when B is selected from Method of Determination.

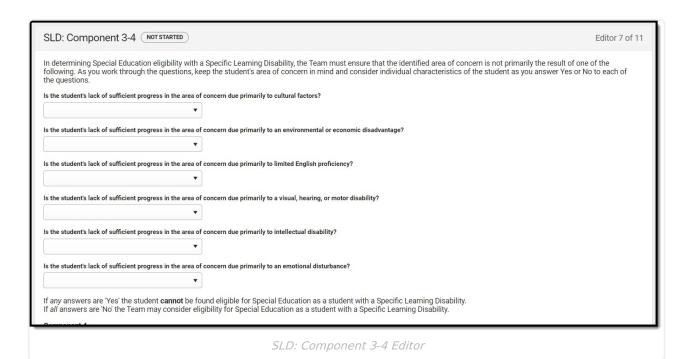


Field	Description	Validation
B1. Based on a finding of a severe discrepancy between IQ and achievement, the student exhibits a pattern of strengths and weaknesses in performance, achievement or both, relative to age or ELA or Math Curriculum Framework standards, or intellectual development, in the areas 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.





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

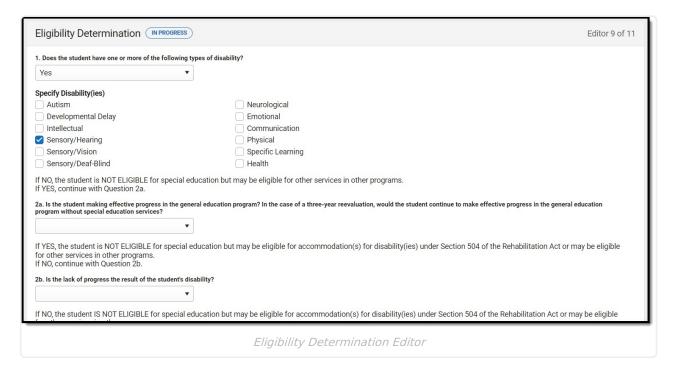
The SLD: Determination editor indicates if the team has identified the student as eligible for special education services as a result of the observations of the previous editors.



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Eligibility Determination

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





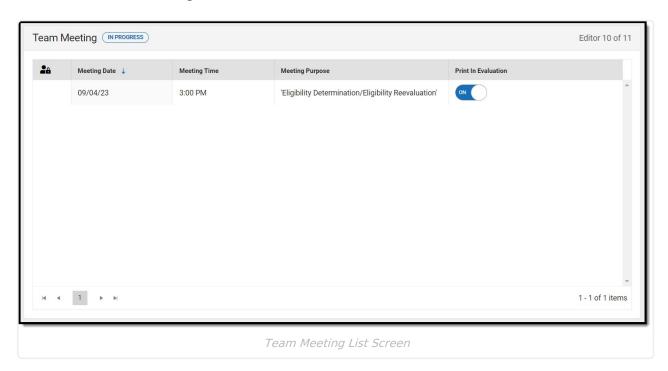


Field	Description	Validation
Does the student have one or more of the following types of disability?	Options are Yes or No.	N/A
Specify Disability(ies)	The student's disability(ies). Options include:	Multiple options can be selected.
2a. Is the student making effective progress in the general education 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.



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.



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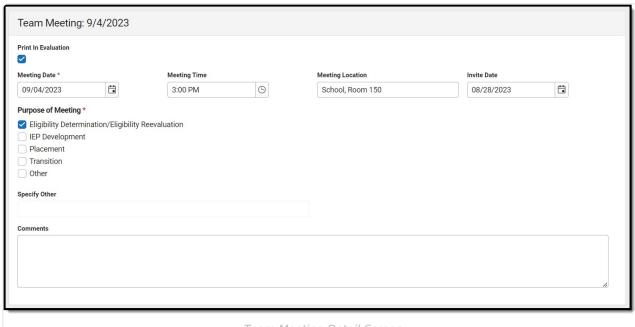
Team Meeting List Screen

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></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.	

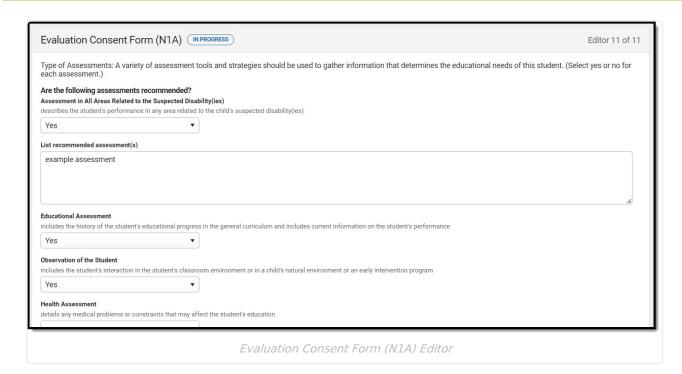


Field	Description	Validation
Comments	Any comments related to the meeting.	This field is limited to 8000 characters.
Attendance		
First Name Required	The person's first name.	This field is read-only when the name pulls in from the Team Members tool when the Refresh button is clicked. Displays as a text 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.





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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