

Evaluation (Massachusetts)

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

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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 [Plan and Evaluation Information](#) article.

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

Editor Home - **MA ESR 2023 ⓘ			
NAME	STATUS	MODIFIED BY	COMPLETED BY
Evaluation Information	IN PROGRESS	System Administrator 12/27/23 11:02 AM	>
Enrollment Information	NOT STARTED		>
Student Information	IN PROGRESS	System Administrator 12/27/23 11:02 AM	>
Parent/Guardian Information	IN PROGRESS	System Administrator 12/27/23 11:02 AM	>
SLD: Component 1	NOT STARTED		>
SLD: Component 2	NOT STARTED		>
SLD: Component 3-4	NOT STARTED		>
SLD: Determination	NOT STARTED		>

Editor Home

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
IN PROGRESS
Editor 1 of 11

Meeting Information

Meeting Type *

☒ Initial Evaluation

☐ Reevaluation

☐ Placement

Meeting Date *

Referral Date *

Consent Date

Consent Received

Evaluation Information Editor

► [Click here to expand...](#)

Field	Description	Validation
Meeting Type <i>Required</i>	The type of meeting. Options include: <ul style="list-style-type: none"> Initial Evaluation Re-Convene Reevaluation Placement Three Year Reevaluation 	Multiple selections can be made.
Meeting Date <i>Required</i>	The day of the meeting.	This field auto-populates with the date evaluation was created.
Referral Date <i>Required</i>	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.

Enrollment Information

IN PROGRESS

Editor 2 of 11

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

Grade
03

Assigned School Information (Complete after a placement has been made)

School Name
ELEMENTARY SCHOOL

School Phone

School Street Address

School City

School State
MA

School Zip

Cost-Shared Placement

Specify Agency

District Information

District Number

District Name
PUBLIC SCHOOLS

District Address
MA 02301

District Phone

District SPED Address
MA 55555

District SPED Phone

► [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)		
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 <i>*Required</i>	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).

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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

IN PROGRESS

Editor 3 of 11

When an Evaluation is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name	First Name	Middle Name	Suffix
	WALKER	LOPEZ	
Age	Birthdate	Gender	
8		M	
Student Language		Language of Instruction *	
Spanish			
Address		LASID	SASIS
	MA 02301		
If 18 or older:		Specify Court Appointed Guardian	

Case Manager Information

Name	Title
------	-------

Student Information Editor

► [Click here to expand...](#)

Field	Description	Validation
Last Name	The student's last name.	<p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Last Name</p> <p>identity.lastName</p>
First Name	The student's first name.	<p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > First Name</p> <p>identity.firstName</p>

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

Field	Description	Validation
Student Language	The student's home primary language.	<p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Language At Home</p> <p>identity.homePrimaryLanguage</p>
Language of Instruction <i>Required</i>	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	<p>The student's address.</p> <p>This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.</p>	<p>Household Address Information tool</p> <p>address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip</p>
LASID	The student's local ID number.	<p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > Student Number</p> <p>identity.studentNumber</p>
SASID	The student's state ID number.	<p>This field auto-populates from student's Demographics record when Education Plan is saved and each time Refresh is clicked.</p> <p>Demographics > State ID Number</p>
If 18 or older	<p>The student's decision making determination when they are 18 years old or older. Options include:</p> <ul style="list-style-type: none"> • 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 Information		
Name	The name of the student's case manager.	<p>This field auto-populates with active Case Manager Name from Team Members tool.</p> <p>Special Ed Team Members > Name</p> <p>teamMember.firstName teamMember.lastName</p>
Title	The role of the student's case manager.	<p>This field auto-populates with active Case Manager Title from Team Members tool.</p> <p>Special Ed Team Members > Title</p> <p>teamMember.title</p>
Phone	The phone number of the case manager.	<p>This field auto-populates with active Case Manager Work Phone from Team Members tool.</p> <p>Special Ed Team Members > Work Phone</p>

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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

IN PROGRESS

Editor 4 of 11

When a Plan is generated, a snapshot of the parent/guardian information is taken from Census. Individuals on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

*Only records with a sequence of 1 or 2 will print.

LUCIO B - FATHER

Print Sequence

1

Legal Guardian

Yes

Delete

Home Phone

Work Phone

Cell Phone

E-mail

Home Primary Language
English

Parent Preferred Mode of Communication

Phone

Specify Other

MARITZA SOFIA - MOTHER

Print Sequence

2

Legal Guardian

Yes

Delete

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

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

Field	Description	Validation
Home Primary Language	The language spoken at the guardian's home.	<p>This field auto-populates from the guardian's Census record when the plan is saved and each time the Refresh button is clicked.</p> <p>Demographics > Person Information > Home Language</p> <p>identity.homePrimaryLanguage</p>
Parent Preferred Mode of Communication	<p>The manner in which the parent/guardian wants to be communicated. Options include:</p> <ul style="list-style-type: none"> • Phone • Email • Messaging App • Other 	N/A
Specify Other <i>*Required</i>	The other manner of communication.	*This field is available and required when Other is selected as the Parent Preferred Mode of Communication field.

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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 NOT STARTED

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Historical Review

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 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.

☐ N/A

SLD: Component 1 Editor

► [Click here to expand...](#)

Field	Description	Validation
Have the above requirements been met?	<p>Indicates the above requirements were met. Options include:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> Educationally relevant medical findings are noted N/A 	N/A
Findings	A description of the findings.	N/A

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SLD: Component 2

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

SLD: Component 2

NOT STARTED

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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

- | | |
|--|--|
| <input type="checkbox"/> Oral Expression | <input type="checkbox"/> Written Expression |
| <input type="checkbox"/> Basic Reading Skills | <input type="checkbox"/> Reading Comprehension |
| <input type="checkbox"/> Reading Fluency Skills | <input type="checkbox"/> Listening Comprehension |
| <input type="checkbox"/> Mathematics Problem Solving | <input type="checkbox"/> 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	<p>The method of determination. Options include:</p> <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> • 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 <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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

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SLD: Component 3-4

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

SLD: Component 3-4

NOT STARTED

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In determining Special Education eligibility with a Specific Learning Disability, the Team must ensure that the identified area of concern is not primarily the result of one of the following. As you work through the questions, keep the student's area of concern in mind and consider individual characteristics of the student as you answer Yes or No to each of the questions.

Is the student's lack of sufficient progress in the area of concern due primarily to cultural factors?

Is the student's lack of sufficient progress in the area of concern due primarily to an environmental or economic disadvantage?

Is the student's lack of sufficient progress in the area of concern due primarily to limited English proficiency?

Is the student's lack of sufficient progress in the area of concern due primarily to a visual, hearing, or motor disability?

Is the student's lack of sufficient progress in the area of concern due primarily to intellectual disability?

Is the student's lack of sufficient progress in the area of concern due primarily to an emotional disturbance?

If any answers are 'Yes' the student **cannot** be found eligible for Special Education as a student with a Specific Learning Disability.
If *all* answers are 'No' the Team may consider eligibility for Special Education as a student with a Specific Learning Disability.

Component 4

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
NOT STARTED
Editor 8 of 11

The Team has reviewed Components 1-4 and has determined that the student has a Specific Learning Disability and requires Special Education services.

Yes

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
IN PROGRESS
Editor 9 of 11

1. Does the student have one or more of the following types of disability?

Yes

Specify Disability(ies)

☐ Autism
☐ Neurological

☐ Developmental Delay
☐ Emotional

☐ Intellectual
☐ Communication

☒ Sensory/Hearing
☐ Physical

☐ Sensory/Vision
☐ Specific Learning

☐ Sensory/Deaf-Blind
☐ Health

If NO, the student is NOT ELIGIBLE for special education but may be eligible for other services in other programs.
If YES, continue with Question 2a.

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?

If YES, the student is NOT ELIGIBLE for special education but may be eligible for accommodation(s) for disability(ies) under Section 504 of the Rehabilitation Act or may be eligible for other services in other programs.
If NO, continue with Question 2b.

2b. Is the lack of progress the result of the student's disability?

If NO, the student IS NOT ELIGIBLE for special education but may be eligible for accommodation(s) for disability(ies) under Section 504 of the Rehabilitation Act or may be eligible

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)	<p>The student's disability(ies). Options include:</p> <ul style="list-style-type: none"> • 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.

Team Meeting IN PROGRESS

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	Meeting Date ↓	Meeting Time	Meeting Purpose	Print In Evaluation
	09/04/23	3:00 PM	'Eligibility Determination/Eligibility Reevaluation'	<input checked="" type="checkbox"/>

1

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: 9/4/2023

Print In Evaluation



Meeting Date *

09/04/2023



Meeting Time

3:00 PM



Meeting Location

School, Room 150

Invite Date

08/28/2023



Purpose of Meeting *



Eligibility Determination/Eligibility Reevaluation



IEP Development



Placement



Transition



Other

Specify Other

Comments

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 <i>Required</i>	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 <i>Required</i>	The purpose of the meeting. Options include: <ul style="list-style-type: none"> • Eligibility Determination/Eligibility Reevaluation • IEP Development • Placement • Transition • Other 	N/A
Specify Other <i>*Required</i>	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 <i>Required</i>	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 <i>Required</i>	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

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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) IN PROGRESS

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Type of Assessments: A variety of assessment tools and strategies should be used to gather information that determines the educational needs of this student. (Select yes or no for each assessment.)

Are the following assessments recommended?

Assessment in All Areas Related to the Suspected Disability(ies)

describes the student's performance in any area related to the child's suspected disability(ies)

Yes

List recommended assessment(s)

example assessment

Educational Assessment

includes the history of the student's educational progress in the general curriculum and includes current information on the student's performance

Yes

Observation of the Student

includes the student's interaction in the student's classroom environment or in a child's natural environment or an early intervention program

Yes

Health Assessment

details any medical problems or constraints that may affect the student's education

Evaluation Consent Form (N1A) Editor

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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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