

# Evaluation (Massachusetts)

Last Modified on 06/28/2024 10:24 am CDT

[Editor Home](#) | [General Information](#) | [Editor Types](#) | [Editor Lock Out and Release Logic](#) | [Template Banks](#) | [Text Editors](#) | [Editors](#)

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

*Editor Home*

## Editor Home

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

Header	Description
<b>Name</b>	The name of the editor.
<b>Status</b>	<p>The state of the editor. Statuses can be:</p> <ul style="list-style-type: none"> <li>• <b>In Progress</b> indicates a user has entered and saved data in that editor.</li> <li>• <b>Not Started</b> is the default status for all editors.</li> <li>• <b>Complete</b> 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.</li> <li>• <b>Not Needed</b> indicates a user has clicked the <b>Not Needed</b> button on the editor. This is usually done for editors that do not apply to the student.</li> </ul> <p>The following statuses are only available for certain state-specific documents:</p> <ul style="list-style-type: none"> <li>• <b>ESign</b> indicates that the editor has functionality related to the eSignature process. See the <a href="#">Nevada Individual Education Plan eSignature Process</a> or <a href="#">Delaware Special Ed Plan eSignature Process</a> articles for additional information.</li> <li>• <b>Complete Pending eSignature</b> indicates the plan has been entered and sent via the Campus Parent portal to the student's guardian for eSignature.</li> </ul>
<b>Modified By</b>	The date and the user by whom the editor was last edited.
<b>Completed By</b>	The date and the user who clicked the <b>Complete</b> 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
<b>Save</b>	<p>Different editors have different save options. Click the arrow next to the Save &amp; Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> <li>• <b>Save</b> captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the <a href="#">Editor Types</a> section for additional information.</li> <li>• <b>Save &amp; Stay</b> 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.</li> <li>• <b>Save &amp; Next</b> captures progress and navigates the user to the next editor.</li> <li>• <b>Save &amp; New</b> 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 <a href="#">Editor Type</a> section for additional information.</li> </ul>

Button	Description
<b>Refresh</b>	<p>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 <b>Save</b> after clicking Refresh to capture changes.</p> <p>A side panel displays a listing of all the student's applicable enrollment records. See the <a href="#">Enrollments</a> tool documentation for additional information.</p>
<b>Cancel</b>	Navigates the user to the Editor Home screen or the List Screen for List editors.
<b>Status</b>	<p>Changes the status of the editor.</p> <ul style="list-style-type: none"> <li>• <b>Complete</b> 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 <b>In Progress</b> to further edit after an editor is marked Complete.</li> <li>• <b>Not Needed</b> 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 <b>In Progress</b> button to further edit after an editor is marked Not Needed.</li> <li>• <b>In Progress</b> only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.</li> </ul> <p>The following status is only available for the Nevada IEP:</p> <ul style="list-style-type: none"> <li>• <b>Complete Pending eSignature</b> 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 <a href="#">Nevada Individual Education Plan eSignature Process</a> or <a href="#">Delaware Special Ed Plan eSignature Process</a> articles for additional information.</li> </ul>
<b>Print</b>	Prints the entire document.
<b>Editors</b>	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 <b>Close</b> to collapse the side panel.
<b>Previous</b>	Navigates the user to the previous editor.
<b>Next</b>	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.

Transition Goals and Services: Postsecondary

Sequence Number  
1

Area\*  
Postsecondary Education and Training Goal

Goal: Add Template

Reading Goal

Courses of Study Add Template

Template Banks

Categories	Sequence	Selected Template Bank Values
+ Course of Study English (4 Templates)		No records selected.
+ Course of Study Math (4 Templates)		

Save & Stay Cancel Insert Selected Template(s) Clear Selected Template(s) Cancel

Template Bank Side Panel

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

### Template Banks

Categories	Sequence	Selected Template Bank Values										
- Course of Study English (4 Templates) <table border="1"> <thead> <tr> <th>Add</th> <th>Templates</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td><b>Course of Study 10</b> Grade 10: English 200</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td><b>Course of Study 11</b> Grade 11: English 300</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td><b>Course of Study 12</b> Grade 12: English 400</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td><b>Course of Study 9</b> Grade 9: English 100</td> </tr> </tbody> </table>	Add	Templates	<input type="button" value="Add"/>	<b>Course of Study 10</b> Grade 10: English 200	<input type="button" value="Add"/>	<b>Course of Study 11</b> Grade 11: English 300	<input type="button" value="Add"/>	<b>Course of Study 12</b> Grade 12: English 400	<input type="button" value="Add"/>	<b>Course of Study 9</b> Grade 9: English 100	1 <input type="button" value="▲"/> <input type="button" value="▼"/>	<b>Course of Study 9</b> <input type="button" value="X"/> Grade 9: English 100
Add	Templates											
<input type="button" value="Add"/>	<b>Course of Study 10</b> Grade 10: English 200											
<input type="button" value="Add"/>	<b>Course of Study 11</b> Grade 11: English 300											
<input type="button" value="Add"/>	<b>Course of Study 12</b> Grade 12: English 400											
<input type="button" value="Add"/>	<b>Course of Study 9</b> Grade 9: English 100											
	2 <input type="button" value="▲"/> <input type="button" value="▼"/>	<b>Course of Study 10</b> <input type="button" value="X"/> Grade 10: English 200										
	3 <input type="button" value="▲"/> <input type="button" value="▼"/>	<b>Course of Study 11</b> <input type="button" value="X"/> Grade 11: English 300										
	4 <input type="button" value="▲"/> <input type="button" value="▼"/>	<b>Course of Study 12</b> <input type="button" value="X"/> Grade 12: English 400										
+ Course of Study Math (4 Templates)												

*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.

Courses of Study:

Grade 9: English 100

Grade 10: English 200

Grade 11: English 300

Grade 12: English 400

*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 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...](#)

[^Back to Top](#)

## 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**  **School Phone**

**School Street Address**  **School City**  **School State**  **School Zip**

**Cost-Shared Placement**  **Specify Agency**

---

**District Information**

**District Number**  **District Name**

**District Address**  **District Phone**

**District SPED Address**  **District SPED Phone**

*Enrollment Information Editor*

▶ [Click here to expand...](#)

[^Back to Top](#)

## 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.

<b>Last Name</b> [REDACTED]	<b>First Name</b> WALKER	<b>Middle Name</b> LOPEZ	<b>Suffix</b>
<b>Age</b> 8	<b>Birthdate</b> [REDACTED]	<b>Gender</b> M	
<b>Student Language</b> Spanish		<b>Language of Instruction *</b>	<input type="text"/>
<b>Address</b> [REDACTED] MA 02301		<b>LASID</b> [REDACTED]	<b>SASIS</b> [REDACTED]
<b>If 18 or older:</b>		<b>Specify Court Appointed Guardian</b>	<input type="text"/>
<b>Case Manager Information</b>			
<b>Name</b>	<b>Title</b>		

Student Information Editor

▶ [Click here to expand...](#)

[^Back to Top](#)

## 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	<span style="border: 1px solid gray; padding: 2px;">Delete</span>
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	<span style="border: 1px solid gray; padding: 2px;">Delete</span>
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Parent/Guardian Information Editor

▶ [Click here to expand...](#)

^ [Back to Top](#)

## 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
Editor 5 of 11

**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...](#)

## SLD: Component 2

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

SLD: Component 2 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**

<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...](#)

## 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 7 of 11

NOT STARTED

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.

*SLD: Component 3-4 Editor*

▶ [Click here to expand...](#)

[^Back to Top](#)

## 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 8 of 11

NOT STARTED

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*

[^Back to Top](#)

## 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 9 of 11

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

**Specify Disability(ies)**

<input type="checkbox"/> Autism	<input type="checkbox"/> Neurological
<input type="checkbox"/> Developmental Delay	<input type="checkbox"/> Emotional
<input type="checkbox"/> Intellectual	<input type="checkbox"/> Communication
<input checked="" type="checkbox"/> Sensory/Hearing	<input type="checkbox"/> Physical
<input type="checkbox"/> Sensory/Vision	<input type="checkbox"/> Specific Learning
<input type="checkbox"/> Sensory/Deaf-Blind	<input type="checkbox"/> 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...](#)

[^Back to Top](#)

## 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 Editor 10 of 11

	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 of 1 items

Team Meeting List Screen

▶ [Click here to expand...](#)

# 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
Editor 11 of 11

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*

▶ [Click here to expand...](#)