Existing Data Review (Wisconsin) [.2331 and previous]

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> You are viewing a previous version of this article. See Existing Data Review (Wisconsin) for the most current information.

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Tool Search: Special Ed Documents

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

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

> The current format of this document is the **WI Existing Data Review 2022**. Evaluation formats are selected in Eval Types.

Editor Home

The Editor Home lists the editors available on the student's Evaluation and the Modification and Completion information.

Editor Home

Header	Description
Name	The name of the editor.
Status	The state of the editor. Statuses can be: • **In Progress** indicates a user has entered and saved data in that editor. • **Not Started** is the default status for all editors. • **Complete** indicates a user has clicked the **Complete** button on the editor. This does not lock the editor from further editing, but indicates the user considers the editor to be finished. • **Not Needed** indicates a user has clicked the **Not Needed** button on the editor. This is usually done for editors that do not apply to the student.
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the **Complete** button for that editor.

General Evaluation Information

The following table lists the buttons available for the editors:

Button	Description

Button	Description
Save	Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor. • **Save** captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • **Save & Stay** captures progress and keeps the user on the current editor. This save button is the default save option and usually found within the detail screen of List editors, such as Goals and Objectives. • **Save & Next** captures progress and navigates the user to the next editor. • **Save & New** captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Types section for additional information.
Refresh	Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted people records. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes. A side panel displays listing all applicable Enrollment records for the student. See the Enrollments tool documentation for additional information.
Cancel	Navigates the user to the Editor Home screen or to the List Screen for List editors.
Status *i.e. Complete, Not Needed, etc.*	Changes the status of the editor. • **Complete** indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. To further edit after an editor is marked Complete, the user must click **In Progress.** • **Not Needed** indicates the editor does not apply to the student's evaluation. This makes the editor read only. However, this does not lock the editor from further editing. To further edit after an editor is marked Not Needed, click the **In Progress** button. • **In Progress** only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.
Print	Prints the entire evaluation.
Editors	Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click **Close** to collapse the side panel.
Previous	Navigates the user to the previous editor.
Next	Navigates the user to the next editor.

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor display. 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. An example list editor is the Team Participants editor.

Padlock Icon

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. Once the editing user navigates away from an editor, that editor becomes available for others to work on.

Template Banks

Certain fields within several editors have a paper icon displays next to their name. When the icon is clicked, a side panel displays with the available library of predetermined text for that field. Template Banks are managed in System Administration.

Editors

Data Review Header | Enrollment Information | Student Information | Parent/Guardian Information | (I-3) Team Meeting Cover Page | (ED-1) Existing Data Review | (ED-1) Team Participants | (ED-1) Parent Participation | (IE2/RE4) No Additional Assessments Needed | (IE3/RE5) Need to Conduct Additional Assessments

The following section lists each editor and describes each field on the editor.

Data Review Header

The Data Review Header editor lists general information about the Review.

> This editor must be saved before continuing to other parts of the evaluation.

Data Review Header Editor

▶ Click here to expand...

Field	Description	Validation
Created Date *Required*	The day the existing data review was created.	N/A
Type of Data Review *Required*	The type of data review documented. Options include Initial or Reevaluation.	The values available in this dropdown are hard coded.
Form Completed By	The day the form is to be completed.	N/A
Completed Date	The day the form was completed.	N/A
Notice of receipt of referral and start of initial evaluation/notice of reevaluation was provided to parents	Indicates if the notice was provided to the parent/guardian(s).	N/A
Receipt Date	The day the notice was provided to the parent/guardian(s).	N/A
For students transferring between public agencies: Evaluation Report reviewed and adopted (if applicable) by	A description of who reviewed and adopted the transfer student's evaluation.	N/A

Field	Description	Validation
Evaluation Adopted On	The day the evaluation for transfer students was adopted on.	N/A
For students transferring between public agencies: IEP reviewed and adopted (if applicable) by	A description of who reviewed and adopted the transfer student's plan.	N/A
IEP Adopted On	The day the plan for transfer students was adopted on.	N/A

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Enrollment Information

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

The **Refresh** button retrieves a fresh copy of data from the student's record.

Enrollment Information Editor

▸ Click here to expand...

Field Name	Description	Ad hoc/Database Location	Validation
Primary Impairment *Required*	The primary disability of the student. Options available are the same as those at Student Information > General > Enrollments > SPED > Primary Impairment.	Learner Planning > Learning Plans > disability1 Locked Attribute Dictionary: Enrollment.disability1	When the editor is first opened, this field auto-populates with "N: Not IDEA Eligible or No Disability". On Save, this field cannot have "N: Not IDEA Eligible or No Disability" as a value. This field auto-populates from the selected Enrollment on Refresh. Users can also manually edit the value if needed.
Secondary Impairment	The second disability of the student, if applicable. Options available are the same as those at Student Information > General > Enrollments > SPED > Primary Impairment.	Learner Planning > Learning Plans > disability2 Locked Attribute Dictionary: Enrollment.disability2	This field auto-populates from the selected Enrollment on Refresh. Users can also manually edit the value if needed.
Third Impairment	The third disability of the student, if applicable. Options available are the same as those at Student Information > General > Enrollments > SPED > Primary Impairment.	Learner Planning > Learning Plans > disability3 Locked Attribute Dictionary: Enrollment.disability3	This field auto-populates from the selected Enrollment on Refresh. Users can also manually edit the value if needed.

Field Name	Description	Ad hoc/Database Location	Validation
Fourth Impairment	The fourth disability of the student, if applicable. Options available are the same as those at Student Information > General > Enrollments > SPED > Primary Impairment.	Learner Planning > Learning Plans > disability4 Locked Attribute Dictionary: Enrollment.disability4	This field auto-populates from the selected Enrollment on Refresh. Users can also manually edit the value if needed.
Fifth Impairment	The fifth disability of the student, if applicable. Options available are the same as those at Student Information > General > Enrollments > SPED > Primary Impairment.	Learner Planning > Learning Plans > disability5 Locked Attribute Dictionary: Enrollment.disability5	This field auto-populates from the selected Enrollment on Refresh. Users can also manually edit the value if needed.
Grade	The student's current grade.	Enrollment > Grade enrollment.grade	This field auto-populates from selected Enrollment on Refresh. User can also manually edit the values if needed.
School Name	The name of the school associated with the student's Enrollment record.	Learner Planning > Learning Plans > servingSchoolName	This field auto-populates from selected Enrollment on Refresh. User can also manually edit the values if needed.
School Phone	The phone number of the school associated with the student's Enrollment record.	N/A	This field auto-populates from selected Enrollment on Refresh from System Administration > Resources > School > (School Name that matches Enrollment record) > Phone. User can also manually edit the values if needed.

Field Name	Description	Ad hoc/Database Location	Validation
District of Residence	The student's district of residence.	Learner Planning > Learning Plans > residentDistrictNumber	This field is read-only. This field auto-populates from selected Enrollment on Refresh from Enrollment > Resident District.
Serving District	The student's district of service.	Learner > Active Enrollment > Core > servingDistrict	This field is read-only. This field auto-populates from selected Enrollment on Refresh from Enrollment > Serving District.
District Information *These fields are read-only.*			
District Number	The district number associated with the Enrolled school.	System Administration > Resources > District Information > State District Number	N/A
District Name	The district name associated with the Enrolled school.	System Administration > Resources > District Information > Name	N/A
District Address	The district address associated with the Enrolled school.	System Administration > Resources > District Information > Address	N/A
District Phone	The district phone number associated with the Enrolled school.	System Administration > Resources > District Information > Phone	N/A
District SPED Address	The district special ed address associated with the Enrolled school.	System Administration > Resources > District Information > SPED Address	N/A
District SPED Phone	The district special ed phone number associated with the Enrolled school.	System Administration > Resources > District Information > SPED Phone	N/A

Student Information

The Student Information editor displays basic information about the student such as demographic

information. This is a read-only editor.

Student Information IN PROGRESS   Editor 3 of 10

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
	Gabriel	L	

Race, Ethnicity	Gender	Birthdate	Student Number
Hispanic/Latino	M		

Student Primary Language English

Interpreter Needed

WISEid

Address
, WI 53402-5537

Case Manager Information

Name   **Title**

Phone

▸ Click here to expand…

Field	Description	Ad Hoc/Location
Last Name	The student's last name.	Census > People > Demographics > Last Name identity.lastName
First Name	The student's first name.	Census > People > Demographics > First Name identity.firstName
Middle Name	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
Race, Ethnicity	The student's state defined race.	Census > People > Demographics > State Race/Ethnicity

Field	Description	Ad Hoc/Location
Gender	The student's gender.	Census > People > Demographics > Gender identity.gender
Birthdate	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate
Student Number	The student's identification number.	Census > People > Demographics > Student Number identity.studentNumber
Student's Primary Language	The student's first language. The values available in this list are available in a locked attribute dictionary, Language List (Definition.iso639-2Language).	Census > People > Demographics > Home Primary Language identity.homePrimaryLanguage
Interpreter Needed	Indicates the student requires an interpreter. Options are Yes or No.	N/A
WISEid	The student's state ID number.	Census > People > Demographics > State ID student.stateID
Student 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.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
Case Manager Information *These fields are read-only.*		
Name	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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 **Delete** 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.

When the **Private Flag** is marked on the Team Members tool for the parent/guardian, all contact information on this editor for that person is cleared out and a note on the editor display, "One or more records has been marked Private in the Team Members Tab. Contact information was not imported for those records and will appear blank below." On the printed document it reads, "Unpublished" in each of those areas.

When the **Educational Surrogate Flag** is marked on the Team Members tool, that person displays on the Parent/Guardian Information editor with "Educational Surrogate Parent" next to their name as the relationship and all other fields are hidden from the screen as well as on the printed document.

Parent/Guardian Information Editor

▶ Click here to expand...

Field	Description	Ad Hoc	Validation
Last Name	The last name of the parent/guardian.	Census > People > Demographics > Last Name identity.lastName	This field populates from Census. This is part of the header for the parent/guardian.
First Name	The first name of the parent/guardian.	Census > People > Demographics > First Name identity.firstName	This field populates from Census. This is part of the header for the parent/guardian.
Middle Name	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.
Suffix	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.
Relationship	The relation of the parent/guardian to the student.	Census > People > Relationships	This field populates from Census. This is part of the header for the parent/guardian.
Print Sequence	The print order of the parent/guardian(s) on the IEP.	N/A	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, only parent/guardian(s) with a sequence number prints in the order defined.

Field	Description	Ad Hoc	Validation
Address	The parent/guardians' address.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip	This field populates from Census. When there are multiple addresses for a person, the drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked Primary.
Home Phone	The home phone number of the parent/guardian.	Census > People > Demographics > Household Phone	This field populates from Census.
Work Phone	The work phone of the parent/guardian.	Census > People > Demographics > Work Phone	This field populates from Census.
Cell Phone	The cell phone of the parent/guardian.	Census > People > Demographics > Cell Phone	This field populates from Census.
Email	The primary email address for the parent/guardian.	Census > People > Demographics > Email	This field populates from Census.
Primary Language	The parent/guardian's first language.	Census > People > Demographics > Home Primary Language identity.homePrimaryLanguage	This field populates from Census. The values available in this list are available in a locked attribute dictionary, Language List (Definition.iso639-2Language).

Field	Description	Ad Hoc	Validation
Interpreter Needed	Indicates the student requires an interpreter. Options are Yes or No.	N/A	The values available in this dropdown are hard coded.

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(I-3) Team Meeting Cover Page

The Team Meeting Cover Page editor lists the team meetings held regarding the student and the participants of the meeting. Team Meetings display based on the Meeting Date. The **Print in Plan** slider must be marked On for the team meeting record to appear on the printed document.

> Team members added on the Team Members tool can be added to team meetings. Team members can be added manually on this editor, but are not saved in the system and have to be created each time they are included in a meeting.

▶ Click here to expand...

Team Meeting List Screen

Team Meeting List Screen

Column Name	Description	Description
Padlock Icon	The user currently editing the team meeting record.	N/A

Column Name	Description	Description
Meeting Date	The date of the meeting.	This is pulled from the **Meeting Date** field on the Team Meeting detail screen.
Meeting Location	The location of the meeting.	This is pulled from the **Meeting Location** field on the Team Meeting detail screen.
Print in Eval	Indicates this meeting prints on the evaluation.	This field defaults to marked. Any action taken with this slider automatically updates on the Print in Plan slider on the Team Meeting list screen.

Team Meeting Detail Screen

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

Team Meeting Detail Screen

Field Name	Description	Validation
Team Meeting		
Print in Eval	Indicates this meeting prints in the Evaluation.	This field defaults to marked. Any action taken with this checkbox automatically updates on the Print in Plan slider on the Team Meeting list screen.

Field Name	Description	Validation
Meeting Date *Required*	The date of the meeting.	This field auto-populates with the Created Date from the Data Review Header editor.
Meeting Time	The time of the meeting.	N/A
Meeting Location	The location of the meeting.	N/A
Invite Date	The date the invitation for the meeting was sent to participants.	N/A
Purpose of Meeting		
Evaluation and Reevaluation	Indicates which type of evaluation being discussed at the meeting. Options include: • Evaluation including determination of initial eligibility for special education • Reevaluation including determination of continuing eligibility for special education	N/A
Individualized Education Plan (IEP) *(if student is eligible)*	Indicates which type of IEP being discussed at the meeting. Options include: • Develop an initial IEP • Develop an annual IEP • Review/revise IEP • Transition - the consideration of post-secondary goals and transition services *(Required for students beginning at age 14)*.	N/A
Placement *(must be determined when the IEP is developed or reviewed/revised)*	Indicates the type of placement discussed. Options include: • Determine initial placement • Determine continuing placement	N/A

Field Name	Description	Validation
Other	Options include: • Review existing information to determine needs for additional assessments or other evaluation materials *(IEP team meeting optional)* • Conduct a manifestation determination *(check appropriate boxes under IEP & Placement if changes in either are contemplated)* • Determine setting for service during disciplinary change in placement *(must check appropriate boxes under IEP & Placement)* • Other	N/A
Specify *Required*	A text field used to specify the reason for the meeting.	*This field displays and is required when Other is selected above.
If a purpose of this meeting is IEP development, review, and/or revision related to the academic, developmental and functional needs of the child, the IEP team considered the results of:		
Initial or most recent evaluation	Indicates the IEP team considered the initial or most recent evaluation in their determination. Options include: • Yes • Not Applicable	The values available in this dropdown are hard coded.
Statewide Assessments	Indicates the IEP team considered any statewide assessment in their determination. Options include: • Yes • Not Applicable	The values available in this dropdown are hard coded.
District-wide assessments	Indicates the IEP team considered any district-wide assessments in their determination. Options include: • Yes • Not Applicable	The values available in this dropdown are hard coded.

Field Name	Description	Validation
Documented Efforts *If a parent did not attend or participate in the meeting by other means and did not agree to the time and place of the IEP team meeting, document three efforts to involve the parent(s)/guardian(s).*		
Date	The date the attempt was made.	This field is duplicated a total of three times to document the three attempts.
Method	The method of contact.	This field is duplicated a total of three times to document the three attempts.
Result	The result of the attempt.	This field is duplicated a total of three times to document the three attempts.
Comments	Any additional comments needed to document the attempts.	N/A
Attendance		
First Name *Required*	The first name of the participant.	The Team Member names listed are read-only and are pulled from the person's District Assignment. Team members can be added using the Add button.
Last Name *Required*	The last name of the participant.	The Team Member names listed are read-only and are pulled from the person's District Assignment. Team members can be added using the Add button.
Role	The title of the participant.	N/A
LEA	The Local Education Agency contact.	At least one Team Member must be marked as LEA in order to complete the editor.
Invited	Indicates the participant was invited.	This determines whether or not the team member prints on the IEP.
Attended	Indicates the participant attended the meeting.	Team Members also display on the printed document when this is marked Yes, even when the Invited checkbox has not been marked or when marked No and Invited has been marked.

(ED-1) Existing Data Review

The Existing Data Review editor records the review of existing evaluation data regarding the student's academic achievement to determine if any additional data is needed, including additional assessments.

Existing Data Review Editor

▶ Click here to expand...

Field	Description	Validation
Information from referral for special education/notice of reevaluation was reviewed	Indicates if the referral and/or notice was reviewed. Options include Yes or No.	The values available in this dropdown are hard coded.

Field	Description	Validation
Information about the student's (including preschool children) academic achievement	Indicates which academic areas have been reviewed by the team. Options include: • Early literacy/Reading achievement • Speaking and listening achievement • Language achievement • Writing achievement • Mathematics achievement • Physical education (PE) achievement • Academic achievement in other areas (e.g., science, social studies, etc.)	Multiple checkboxes may be selected.
Information about the student's (including preschool children) functional performance	Indicates which functional areas have been reviewed by the team. Options include: • Cognitive learning (e.g., executive function skills, information processing) • Communication (e.g., sound production, fluency, voice, social and pragmatic language) • Independence/Self-determination (e.g., self-advocacy, self-care and hygiene) • Physical/Health (e.g., vision, hearing, fine and gross motor skills, mobility) • Social and Emotional Learning (e.g., perspective taking, self-management and regulation)	Multiple checkboxes may be selected.

Field	Description	Validation
Sources of Information	Indicates the sources of data reviewed. Options include: • Information or evaluations provided by the parent(s)/family • Previous evaluations • Current classroom-based, district-wide or state assessment results • Observations by teachers, related service providers and others (including current classroom-based observations and observations by reading teacher/specialist, if applicable) • Previous interventions and effects • Behavioral records (including but not limited to discipline data, suspensions, office referrals, and data tracking a behavior) • Assistive technology assessment (including but not limited to assessment for accessible educational materials and augmentative and alternative communication) • Functional behavioral assessment • Adaptive PE Assessment • Information from other sources (including but not limited to postsecondary transition, medical, Birth-to-3)	Multiple checkboxes may be selected.

Field	Description	Validation

Field	Description	Validation
Additional Data Needed	Indicates additional information is needed. Options include Yes or No.	When Yes, the IE3/RE5 editors is available. When No the IE2/RE4 editors is available. The values available in this dropdown are hard coded.
II. Additional areas of concern identified during the review of existing data, if any	A description of any additional areas of concern that were identified during the review process.	Users can enter text into this area or mark None, which makes this field unavailable.
None	Indicates no additional areas of concern have been identified.	When marked, the text area above is unavailable.
III. Describe additional assessments and other evaluation materials needed to complete a sufficiently comprehensive evaluation to assess the areas of concerns and determine if a student meets criteria for a disability category and needs specially designed instruction	A description of any additional assessments needed.	Users can enter text into this area or mark None, which makes this field unavailable.
None	Indicates no additional assessments are needed.	When marked, the text area above is unavailable.

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(ED-1) Team Participants

The Team Participants editor lists team members participating in the review of existing data to determine if additional information is needed.

▶ Click here to expand...

Team Participants List Screen

Team Participants List Screen

Column Name	Description	Description
Padlock Icon	The user currently editing the team meeting record.	N/A
Date	The date of the meeting.	N/A
Team Member Name	The name of the participant/team member.	N/A
Print in Eval	Indicates this meeting prints on the evaluation.	This field defaults to marked. Any action taken with this slider automatically updates on the Print in Plan slider on the Team Meeting list screen.

Team Participants Detail Screen

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

Team Participant Detail Screen

Field	Description	Validation
Print in Eval	Indicates this record prints in the Evaluation.	This field defaults to marked. Any action taken with this checkbox automatically updates on the Print in Plan slider on the Team Participant list screen.
Link to Team Member	Any team member from student's Team Members tool.	Values available in this dropdown display all active Team Members from the Special Ed Team Members tool.
LEA	Indicates this team member is the local education agency representative.	At least one Team Member must be marked as LEA in order to complete the editor.
Last Name *Required*	The last name of the team member.	This field auto-populates with value from Link to Team Member, but allows for manual entry when a text field.
First Name *Required*	The first name of the team member.	This field auto-populates with value from Link to Team Member, but allows for manual entry when a text field.

Field	Description	Validation
Role *Required*	The role of the team member.	This field auto-populates with value from Link to Team Member, but allows for manual entry when a text field.
Date *Required*	The date of the meeting.	N/A
Method of Involvement *Required*	The method in which the team member was involved in the meeting.	N/A

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(ED-1) Parent Participation

The Parent Participation editor lists parents/guardians who did not attend or participate in the review of existing data to determine if additional information is needed.

▸ Click here to expand...

Parent Participant List Screen

Parent Participation List Screen

Column Name	Description	Description
Padlock Icon	The user currently editing the team meeting record.	N/A

Column Name	Description	Description
Date	The date of the meeting.	N/A
Method	The manner in which the parent participated in the meeting.	N/A
Result	The result of the meeting.	N/A
Print in Eval	Indicates this meeting prints on the evaluation.	This field defaults to marked. Any action taken with this slider automatically updates on the Print in Plan slider on the Team Meeting list screen.

Parent Participants Detail Screen

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

Parent Participation Detail Screen

Field	Description	Validation
Print in Eval	Indicates this record prints in the Evaluation.	This field defaults to marked. Any action taken with this checkbox automatically updates on the Print in Plan slider on the Parent Participant list screen.
Date *Required*	The date of the meeting.	N/A
Method	The manner in which the parent participated in the meeting.	N/A
Result	The result of the meeting.	N/A

(IE2/RE4) No Additional Assessments Needed

The No Additional Assessments Needed editor is used to document that no additional assessments are needed for the student.

Notice that No Additional Assessments Needed Editor

▶ Click here to expand...

Field	Description	Validation
Date *Required*	Indicates the date when the determination was made that no additional assessments are needed.	N/A
Document Type	Options include Reevaluation or Initial Evaluation.	This is a read-only field that auto-populates the value of Reevaluation or Initial Evaluation from the Type of Data Review dropdown within the Data Review Header editor. This also determines which printed document displays on print when the editor is placed in a Completed status.
Parent Participated in Making the Determination	Indicates the parent participated in making the determination.	When this is marked, the other checkboxes cannot be selected. At least one of these checkboxes must be selected to save the editor.

Field	Description	Validation
Date of Determination *Required*	The date of determination.	*This is available and required when Parent Participated checkbox is marked.
Determination made in the following way *Required*	The manner in which the determination was made.	*This is available and required when Parent Participated checkbox is marked.
Parent Did Not Participate in Making the Determination and the District Made 3 Attempts to Involve	Indicates the parent did not participate in making the determination.	When this is marked, the other checkboxes cannot be selected. At least one of these checkboxes must be selected to save the editor.
List the three (3) attempts the District made to involve the parent *Required*	Lists the three attempts made by the district to involve the parent.	*This is available and required when Parent Did Not Participate checkbox is marked.
The reason(s) for this determination are	Indicates the reason for the determination.	N/A
Contact Name	The name of the special education contact.	This auto-populates from System Administration > Resources > District Information > District > SPED Contact First Name/SPED Contact Last Name, but can be modified.
Contact Phone	The phone number of the special education contact.	This auto-populates from System Administration > Resources > District Information > District > SPED Phone, but can be modified.
Title	The title of the special education contact.	N/A
Alternate Contact Name	The name of the alternate special education contact.	This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Contact First Name/Alternate SPED Contact Last Name, but can be modified.

Field	Description	Validation
Alternate Contact Phone	The phone number of the alternate special education contact.	This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Phone , but can be modified.

(IE3/RE5) Need to Conduct Additional Assessments

The Need to Conduct Additional Assessments editor is used to document the need to conduct additional assessments for the student.

(IE3/RE5) Need to Conduct Additional Assessments Editor

▶ Click here to expand...

Field	Description	Validation
Date *Required*	Indicates the date when the determination was made that additional assessments are needed.	N/A

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Field	Description	Validation
Document Type	Options include Reevaluation or Initial Evaluation.	This is a read-only field that auto-populates the value of Reevaluation or Initial Evaluation from the Type of Data Review dropdown within the Data Review Header editor. This also determines which printed document displays on print when the editor is placed in a Completed status.
Parent Participated in Making the Determination	Indicates the parent participated in making the determination.	When this is marked, the other checkboxes cannot be selected. At least one of these checkboxes must be selected to save the editor.
Date of Determination *Required*	The date of determination.	This is available and required when Parent Participated checkbox is selected.
Determination made in the following way *Required*	The manner in which the determination was made.	This is available and required when Parent Participated checkbox is selected.
Parent Did Not Participate in Making the Determination and the District Made 3 Attempts to Involve	Indicates the parent did not participate in making the determination.	When this is marked, the other checkboxes cannot be selected. At least one of these checkboxes must be selected to save the editor.
List the three (3) attempts the District made to involve the parent *Required*	Lists the three attempts made by the district to involve the parent.	This is available and required when Parent Did Not Participate checkbox is selected.

Assessments to be Administered

Column names:
- **Areas to be Evaluated** *Required*
- **Description of Assessments and Other Evaluation Materials and Titles, if Known**
- **Name of Evaluator, if Known**

Side Panel will open when "Add Assessment" button is used or when any already added row is clicked on.

Field	Description	Validation
Other evaluation options, if any, considered and reasons rejected, including a description of any other factors relevant to the proposed evaluation of this child.	A description of other evaluation options and/or factors relevant to the proposed evaluation of the student.	Users can enter text into this area or mark None, which makes this field unavailable.
None	Indicates no other evaluation options and/or factors relevant to the proposed evaluation of the student needs to be document.	When marked, the text area above becomes unavailable.
Contact Name	The name of the special education contact.	This auto-populates from System Administration > Resources > District Information > District > SPED Contact First Name/SPED Contact Last Name, but can be modified.
Contact Phone	The phone number of the special education contact.	This auto-populates from System Administration > Resources > District Information > District > SPED Phone, but can be modified.
Title	The title of the special education contact.	N/A
Alternate Contact Name	The name of the alternate special education contact.	This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Contact First Name/Alternate SPED Contact Last Name, but can be modified.
Alternate Contact Phone	The phone number of the alternate special education contact.	This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Phone, but can be modified.

Classic View

▸ Click here to expand...

The Existing Data Review is used to determine whether there is sufficient information needed to conduct a comprehensive evaluation to determine eligibility and to identify all of the student's special education and related services needs.

> The current format of this document is the **WI Existing Data Review 2022**. Evaluation formats are selected in Eval Types.

Existing Data Review Editors

Existing Data Review Editors

The following table lists the editors available on the student's Existing Data Review, the section(s) of the print format that include the entered information, a description of what the editor is used for and any special considerations and instructions for using the editor.

Editor Name	Printed Document Section	Description	Special Considerations and Instructions
Data Review Header	Data Review Header	The Data Review Header editor lists general information about the Review.	This editor must be saved before continuing to other parts of the evaluation. Field definitions may vary by district.
Enrollment Information	Enrollment Information	The Enrollment Information editor includes student data entered on the student's Enrollments tool, including disability information.	Clicking **Get Info from Enrollment** synchronizes the information in the editor with the student's Enrollments record. Users can select which Enrollment to link the Enrollment Status editor to using the **Enrollment** dropdown.
Student Demographics	Student Information	The Student Demographics editor includes student data entered on the student's Demographics tool.	Clicking **Refresh Student Information** will synchronize the information in the editor with the current information entered on the Demographics, Households, School and Enrollments tools.

Editor Name	Printed Document Section	Description	Special Considerations and Instructions
Parent/Guardian Demographics	Guardian Information	The Parent/Guardian Demographics editor populates based on established student/guardian relationships created on the student's Relationships tool or indicated by the guardian checkbox on the Households tool. The editor includes Demographics information for the student's guardian.	Clicking **Refresh Guardian Information** synchronizes information in the editor with the most recent information from the student's guardian's Demographics, Households, and Team Members tool. If the Start Date for the Educational Surrogate Parent on the Team Members tool falls anytime before or on the Eval Start date, the data will pull into the Parent/Guardian Demographics editor. If the Start Date for the Educational Surrogate Parent falls anytime after the Eval Start Date, the data will NOT pull in to the Parent/Guardian Demographics editor.
(I-3) Team Meeting Cover Page	N/A	The Team Meeting Cover Page indicates the reason the evaluation meeting was held, including if the meeting was a result of the student's performance on assessments.	Template Banks are established in System Administration and available by clicking the white paper icon next to the header of the appropriate sections.
(ED-1) Existing Data Review	Existing Data Review to Determine if Additional Assessments or Evaluation Data are Needed	The Existing Data Review editor records the review of existing evaluation data regarding the student's academic achievement to determine if any additional data is needed, including additional assessments.	N/A

Editor Name	Printed Document Section	Description	Special Considerations and Instructions
(ED-1) Team Participants	List of IEP team participants involved with the student's evaluation.	The Team Participants editor lists team members participating in the review of existing data to determine if additional information is needed.	At least one Team Member must be marked LEA within the ED-1 Team Participants editor. The **Print in Eval** checkbox must be marked for the checklist to display in the printed evaluation. Template Banks are established in System Administration and available by clicking the white paper icon next to the header of the appropriate sections.
(ED-1) Parent Participation	List of parent/guardian participants who did not attend or participate in the review.	The Parent Participation editor lists parents/guardians who did not attend or participate in the review of existing data to determine if additional information is needed.	The **Print in Eval** checkbox must be marked for the checklist to display in the printed evaluation.