

# Existing Data Review (Wisconsin) [.2335 - .2339]

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

[Editor Home](#) | [General Evaluation Information](#) | [Editor Types](#) | [Padlock Icon](#) | [Template Banks](#) | [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

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 - \*\*WI Existing Data Review 2022 - current new ⓘ

NAME	STATUS	MODIFIED BY	COMPLETED BY
Data Review Header	<span>IN PROGRESS</span>	System Administrator 12/6/22 10:18 AM	>
Enrollment Information	<span>IN PROGRESS</span>	System Administrator 12/6/22 10:21 AM	>
Student Information	<span>IN PROGRESS</span>	System Administrator 12/6/22 11:03 AM	>
Parent/Guardian Information	<span>IN PROGRESS</span>	System Administrator 12/6/22 10:18 AM	>
(I-3) Team Meeting Cover Page	<span>IN PROGRESS</span>	System Administrator 12/6/22 11:19 AM	>
(ED-1) Existing Data Review	<span>IN PROGRESS</span>	System Administrator 12/6/22 11:26 AM	>
(ED-1) Team Participants	<span>IN PROGRESS</span>	System Administrator 12/6/22 11:30 AM	>

*Editor Home*

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 <b>Complete</b> button on the editor. This does not lock the editor from further editing, but indicates the user considers the editor to be 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>
<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 Evaluation Information

The following table lists the buttons available for the editors:


Button	Description
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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 usually found within the detail screen of 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 Types</a> section for additional information.</li> </ul>
<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 people 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 listing all applicable Enrollment records for the student. See the <a href="#">Enrollments</a> tool documentation for additional information.</p>
<b>Cancel</b>	Navigates the user to the Editor Home screen or to the List Screen for List editors.
<b>Status</b> <i>i.e.</i> <i>Complete,</i> <i>Not</i> <i>Needed,</i> <i>etc.</i>	<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. To further edit after an editor is marked Complete, the user must click <b>In Progress</b>.</li> <li>• <b>Not Needed</b> 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 <b>In Progress</b> button.</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>
<b>Print</b>	Prints the entire evaluation.
<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 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
IN PROGRESS
Editor 1 of 10

<p><b>Created Date *</b></p> <input type="text" value="09/05/2022"/>	<p><b>Type of Data Review *</b></p> <div style="border: 1px solid #ccc; padding: 2px;">Initial ▼</div>
<p><b>Form Completed By:</b></p> <input type="text"/>	<p><b>Completed Date</b></p> <input type="text" value="month/day/year"/>
<p>Notice of receipt of referral and start of initial evaluation/notice of reevaluation was provided to parent(s)</p> <input type="checkbox"/>	
<p><b>Receipt Date</b></p> <input type="text" value="month/day/year"/>	
<p>For students transferring between public agencies: Evaluation Report reviewed and adopted (if applicable) by</p> <input type="text"/>	<p><b>Evaluation Adopted On</b></p> <input type="text" value="month/day/year"/>
<p>For students transferring between public agencies: IEP reviewed and adopted (if applicable) by</p> <input type="text"/>	<p><b>IEP Adopted On</b></p> <input type="text" value="month/day/year"/>

Data Review Header Editor

▶ [Click here to expand...](#)

^ [Back to Top](#)

## 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 IN PROGRESS
Editor 2 of 10

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

**Primary Impairment**

**Secondary Impairment**

**Third Impairment**

**Fourth Impairment**

**Fifth Impairment**

**Grade**

**School Name**

**School Phone**

**District of Residence**

**Serving District**

**District Information**

**District Number**

**District Name**

**District Phone**

**District Address**

**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.

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	Interpreter Needed	WISEid	
English		██████████	
Address			
██████████, WI 53402-5537			

Case Manager Information

Name	Title
Phone	

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 **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 IN PROGRESS Editor 4 of 10

When an Evaluation is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian check box marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

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**ROBERT - STEP PARENT**

Print Sequence Delete

Address

Home Phone                      Work Phone                      Cell Phone

E-mail

Primary Language                      Interpreter Needed

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**Gabriela - PARENT**

*Parent/Guardian Information Editor*

▶ [Click here to expand...](#)

^ [Back to Top](#)

## (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...](#)

^ [Back to Top](#)

## (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 any additional data is needed, including additional assessments.



The purpose of the review of existing evaluation data is 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 review of existing data is conducted:

- **After** the parent(s) receives the *Notice of Receipt of Referral and Start of Initial Evaluation or the Notice of Reevaluation*,
- **Before** sending the *Notice of Consent Regarding Need to Conduct Additional Assessments or Notice that No Additional Assessments Needed*.

If a meeting is held to consider existing data, this form is used as documentation of that meeting, along with a Cover Sheet. If no meeting is held, this form is used to document the input and decisions of required participants.

Information from referral for special education/notice of reevaluation was reviewed

Yes ▾

I. Review of existing evaluation data to identify what additional data, if any, are needed to assess areas of concern identified on the referral.

**Existing Data**

For additional information, see [Guide to Special Education Forms](#).

Information about the student's (including preschool children) academic achievement:

check all reviewed

- Early literacy/Reading achievement
- Speaking and listening achievement

*Existing Data Review Editor*

▶ [Click here to expand...](#)

^ [Back to Top](#)

## (ED-1) Team Participants

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

▶ [Click here to expand...](#)

^ [Back to Top](#)

## (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 additional information is needed.

▶ [Click here to expand...](#)

^ [Back to Top](#)

## (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.

(IE2/RE4) Notice that No Additional Assessments Needed
NOT STARTED
Editor 9 of 10

**Date \***

**Document Type**  
Initial

The IEP team has determined that additional assessments or other evaluation materials do not need to be administered to your child to determine whether your child continues to have a disability (impairment for special education) and your child's educational needs.

**Parent Participated in Making the Determination**

**Date of Determination**

**Determination made in the following way:**

**Parent Did Not Participate in Making the Determination and the District Made 3 Attempts to Involve**

List the three (3) attempts the District made to involve the parent:

*Notice that No Additional Assessments Needed Editor*

▶ [Click here to expand...](#)

[^ Back to Top](#)

## (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
NOT STARTED
Editor 10 of 10

**Date \***

**Document Type**

The IEP team has determined that additional assessments or other evaluation materials are needed to determine whether your child continues to have a disability (impairment and a need for special education), and to identify your child's current educational needs.

**Parent Participated in Making the Determination**

**Date of Determination**

**Determination made in the following way:**

**Parent Did Not Participate in Making the Determination and the District Made 3 Attempts to Involve**

List the three (3) attempts the District made to involve the parent:

*(IE3/RE5) Need to Conduct Additional Assessments Editor*

▶ [Click here to expand...](#)

[^ Back to Top](#)

## Previous Versions

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

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