Specific Learning Disabilities
Evaluation Procedures

July, 2010

HISD
Huron Intermediate School District
1299 S. Thomas Road, Suite 1
Bad Axe, MI 48413

Adapted from Eastern Upper Peninsula ISD Procedures/May 2010 and Kalamazoo RESA Procedures/March 2009 and the Michigan Criteria for Determining the Existence of a Specific Learning Disability/November 2009
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INTRODUCTION:
The Huron Intermediate School District (HISD) ensures educational leadership, effective programs, and quality services which complement and enhance the efforts of community partners in educating all learners. The HISD believes that effective core instructional practices and programs, services, evidence-based interventions, data-driven decision-making, and positive behavioral approaches should be available to all students. Intervention resources should be accessible and implemented based on each individual student's intensity of need. To ensure the provision of a quality education for all of Huron County students, the HISD and local schools provide the guidance and the tools necessary to identify individual student needs.

BACKGROUND:
In Michigan, prior to the 2004 reauthorization of the IDEA, the identification of a student suspected to have an SLD was based on a single specific method as defined in the MARSE (Michigan Administrative Rules for Special Education). That method was the severe discrepancy model. The 2004 reauthorization of the IDEA expressly prohibits all states from requiring the use of the severe discrepancy model. As a result, the MARSE were revised in 2006. The new MARSE for determining SLD eligibility provides schools with choices. Those choices include the use of methods for determining SLD eligibility based on the use of scientific, research-based interventions and patterns of strengths and weaknesses. The need to develop new methods for determining SLD eligibility is the driving force behind development of these new criteria.

WHAT IS A SLD?
A specific learning disability is "a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, that may manifest itself in the imperfect ability to listen, think, speak, read, writing, spell, or do mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia that adversely affects a student's educational performance. A SLD does not include learning problems that are primarily the result of visual, hearing, or motor disabilities; mental retardation; emotional disturbance; or of environmental, cultural, or economic disadvantage." (34 CFR § 300.8(c)(10).
WHO EVALUATES FOR DETERMINATION OF SLD ELIGIBILITY?
In compliance with the MARSE, a Multidisciplinary Evaluation Team (MET) conducts a full and individual evaluation of a student suspected to have an SLD. The MET, based upon its evaluation of the student, then makes its recommendation of eligibility to the Individualized Education Plan (IEP) team. The student's IEP team then determines SLD eligibility (R 340.1713).

WHAT PROCESS OF EVALUATION WILL BE USED TO DETERMINE SLD ELIGIBILITY?
The revised MARSE allows the following two processes for determining eligibility: Response to scientific, research based intervention (RtI) or Pattern of Strengths and Weaknesses (PSW).

1) **Response to scientific, research based intervention.** Depending on the local district's practice, this process may have a variety of names; e.g., Student Achievement Model (SAM), Response to Intervention, Michigan’s Integrated Behavior and Learning Support Initiative (MiBLSi). The Michigan Department of Education (MDE) does not mandate any specific scientific, research-based intervention process.

Response to scientific, research-based intervention (RtI):

The federal regulations do not specify what research based interventions must be used, and leave the State with flexibility to determine criteria to best meet local needs.

To utilize RtI, schools must:

1. Provide effective core instruction and supplemental interventions with fidelity
2. Monitor student academic and behavior performance
   - Access dynamic data collection systems that provide staff with performance indicators in academics and behavior that are accurate and timely – for example, the School Wide Information System (SWISTM), Academic Improvement Monitoring System Website (AIMSweb®), and the Dynamic Indicators of Basic Early Literacy Skills (DIBELSTM).
3. Make decisions based on data
   - Develop and implement academic and behavior interventions using student performance indicators
   - Evaluate intervention effectiveness through ongoing data collection and progress monitoring

The use of a fully implemented 3-Tier process meets the standard for SLD evaluation utilizing the RtI option.
2) **Pattern of strengths and weaknesses.** “The MDE does not mandate any specific process to determine a pattern of strengths and weaknesses. Any determination of SLD requires a full comprehensive evaluation according to the evaluation procedures in the federal regulations at §300.301 – §300.311, including those particular to a student suspected of having a SLD in §300.307 – §300.311.”

**Pattern of strengths and weaknesses:**

Determining a pattern of strengths and weaknesses is the second option described by federal regulations. This option, although not required, may be used in districts when an RtI option is not appropriate or feasible. RtI often requires that the district systematically implement the methodology over a period of time, establish district norms and determine procedures for providing Tier 2 and 3 interventions. At this time, RtI may not possible for all areas included in the SLD definition. Also, there may be students arriving in the district in need of evaluation who have not had the opportunity to be evaluated with reference to a systematic intervention process.

The pattern of strengths and weaknesses alternative is based on assessment and a review of achievement scores and performance in a variety of academic areas, with documentation of patterns of strength as compared to other areas where the student demonstrates a pattern of significant academic concerns, relative to the child’s expected abilities. Assessment documents the student’s performance and achievement related to Michigan standards and benchmarks either at the student’s age level, or assigned grade level. As with RtI, assessment includes but is not limited to review of a student’s progress with research based interventions, observations, and student achievement.

Districts must establish local standards for implementing either an RtI process or establishing a pattern of strengths and weaknesses (PSW). The HISD has provided a decision making structure as defined in this manual. Parameters for assessment results are provided as a way of standardizing PSW decision making within and among school districts.

**Note regarding consideration of a severe discrepancy:**

Severe discrepancy may be used as a consideration of eligibility utilizing the PSW model; however, the continued use of severe discrepancy as the primary factor in determining eligibility is not in compliance with the MARSE or IDEA.
SELECTING RESPONSE TO INTERVENTION (RTI) OR PATTERNS OF STRENGTHS AND WEAKNESSES (PSW)

As noted above, decision-making on which process to use to document achievement and learning needs will depend on district policies, status of RtI implementation, staff training, specific areas of concern, length of time the child has attended district programming, and grade level interventions. The following rules are suggested in determining whether to use RtI or PSW for determination of eligibility for special education services as a student with a specific learning disability (SLD):

Rule #1: If you have the ability to use the RtI option, this is the default approach. Use RtI if:
• District policies support the use of RtI as an intervention approach; and,
• District implementation reflects the following principles:
  o Effectively teach all children
  o Intervene early by identifying at-risk students through universal screening
  o A multi-tier model of service delivery provides a systematic approach to support learning
  o Use a problem-solving model to make decisions within a multi-tier model
  o Use scientific, research-based validated interventions/instruction
  o Monitor student progress to inform instruction
  o Use data to make decisions
  o Use assessment for: screening, progress monitoring, and diagnostics

Rule #2: Use PSW if:
• RtI is not being used or is not fully implemented in the skill area of suspected disability
• RtI is not being used or is not fully implemented at the child’s grade level
• The parent requests a special education evaluation and will not extend timelines to accommodate recommended implementation of tier interventions and timelines.

Once a decision has been made as to which process to use, this choice by the IEP team should be reflected on the Evaluation Review form.

THE FOLLOWING CRITERIA APPLY TO ALL METHODS USED TO DETERMINE SLD ELIGIBILITY:
• A student must not be determined to be a student with a disability if the determinant factor for that determination is:
  o vision, hearing, or motor handicaps
  o cognitive impairment
  o emotional impairment
  o autism
  o environmental, cultural, or economic differences
  o lack of instruction in reading and mathematics
  o limited English proficiency

In interpreting evaluation data for the purpose of determining if a student is a student with a disability as defined in 34 CFR § 300.8, and the educational needs of the student, each public agency must:
• draw upon information from a variety of sources including parent and teacher input, observation as well as, information educationally relevant medical findings, and
• ensure that information obtained from all of these sources is documented and carefully considered.
The process of evaluation requires a synthesis of all available assessment information. A student's parents are an integral part of the evaluation process, including providing information about the student. Parents are members of the IEP team meeting held for the purpose of determining eligibility, determining the educational needs of the student, and development of the student's IEP. Parents provide valuable insight and information to teams who conduct assessments in order to complete full and individual evaluations.

THE EVALUATION PLAN
Use the Evaluation Review form to develop and implement the evaluation plan for a student suspected to have a SLD. The Evaluation Review form provides guidance and a general framework for the development of both initial evaluations and reevaluations, and can be used with both the response to scientific, research-based interventions and the pattern of strengths and weaknesses processes.

Federal rule specifies that eligibility evaluation must address the age appropriate instruction that the student has received and the achievement of the student related to grade level standards. Although age is one variable, the emphasis on state approved grade level standards reflects the priority that all instruction for students address grade level content standards.

Evaluations must document:
- Student academic achievement relative to either age- or grade-level standards
- Whether appropriate instruction was provided

Although the federal regulations do not define standards for “appropriate instruction”, the USDOE does note that such instruction has the following characteristics:
- Scientifically research based
- Provided by qualified personnel
- Student progress data is systematically collected and analyzed

Within a systemic plan, it is essential to include a data-driven, decision-making process based on each individual student's needs.

Begin the development of an evaluation plan for determining SLD eligibility by collecting all pertinent data. The data used will be dependent upon the process (or processes) currently used in the district (and specific buildings) for determining the existence of a SLD:

§ 300.311 Documentation for Specific Learning Disability Determination

§ 300.311 provides a checklist for required elements of a written report documenting the evaluation team’s decision regarding eligibility of SLD.
Documentation must include:

1. Statement of eligibility, or lack of eligibility, for specific learning disability
2. Basis for the determination of eligibility
3. Assurance that during the determination process the district:
   a. Collected information from a variety of sources, including aptitude and achievement tests, parent input and teacher recommendations, information about the child’s physical condition, social or cultural background and adaptive behavior.
   b. Documented and carefully considered information obtained from a variety of sources.
4. Relevant behavior noted in observations, and the relationship of the behavior to the child’s academic functioning.
5. Relevant medical findings.
6. Achievement measured to age expectations or state-approved grade level standards.
7. Progress monitoring related to age or grade level standards.
   Or
8. Determination of a pattern of strengths and weaknesses in performance, achievement or both, relative to age, State-approved grade level standards or intellectual development.
9. Determination of exclusionary factors
10. If the child participated in a process that assesses the child’s response to scientific, research-based (or, if necessary, best practice) interventions, documentation of:
    a. Instructional strategies utilized
    b. Student-centered data collected
    c. Parent notification about:
       i. State policies regarding RtI criteria- data and services requirements (Note: the SLD rule, R 340.1713, is Michigan’s policy.)
       ii. Strategies used for increasing the student’s rate of learning
       iii. Parent right to request an evaluation.
11. Evaluation team members and parent must certify whether the report reflects the member’s conclusion.
    a. Members in disagreement must submit a separate statement presenting dissenting conclusions.

Note regarding Initiation of Evaluations and Timelines:

Michigan rules, which specify 30 school days from consent for evaluation to holding an IEP meeting, must be followed unless the parent and district mutually agree to extend the timeline. This request can be made in the event that the evaluation will address RtI after the request for an evaluation.

Although extended evaluation timelines may be requested in order to implement appropriate interventions and collect data on the student’s response, if a parent does not agree to extending the timeline, then the evaluation must proceed and an IEP team meeting convened within the 30 school days allowed under state rules. Whether eligibility can be determined will depend on whether the IEP team has the necessary rule-in, rule-out, and documentation data required for SLD identification.
# SLD Evaluation Resources

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Suggested Questions for Parent Input for Initial Evaluation

Student’s Name: _____________________________ Parent/Guardian Name: _____________________________

Method of Interview (Check one): ☐ Personal Interview ☐ Telephone ☐ Written

Person collected input: ____________________________________________   Date: __________________

1. What are some of your child’s strengths, interests and/or favorite activities?
   ________________________________________________________________
   ________________________________________________________________

2. What does s/he like best about school? ________________________________________________________________
   least? ________________________________________________________________

3. If your child has homework, does s/he complete it without help? ☐ Yes ☐ No
   If no, what type of help is given?
   ________________________________________________________________

4. What goals do you have for your child for this school year? For older students, long range goals/plans?
   ________________________________________________________________

5. Do you have any concerns about your child’s progress? ☐ Yes ☐ No
   If yes, what are they when did you first notice these concerns?
   ________________________________________________________________
   ________________________________________________________________

6. Have you seen any recent changes in your child’s behavior or school performance? ☐ Yes ☐ No
   If yes, please explain:
   ________________________________________________________________

7. Medical information:
   Vision concerns? ________________________________________________________________
       Wears glasses? ____________
   Hearing concerns? ________________________________________________________________
       Wears hearing aid(s)? ____________
   Any other medical/health concerns?
   ________________________________________________________________
   Medical history: accidents, injuries, surgeries?
   Taking medication (Type, reason, side effects)?
   ________________________________________________________________
   ________________________________________________________________
   Any psychological (thinking/emotional) concerns?
   ________________________________________________________________

8. Has your child had a psychological or education evaluation from outside of the school? ☐ Yes ☐ No
   If yes, who did it, when was it done, and what were the results?
   ________________________________________________________________
   ________________________________________________________________

9. Has your child had additional community services in the last 3 years (tutoring, counseling, residential care)?
   ☐ Yes ☐ No   If yes, please describe:
   ________________________________________________________________
10. Home life:
   With whom does your child live at home? _______________________________________________
   What language is spoken at home? ________________________________________________
   How well does your child sleep at night? ____________________________________________
   Length of time sleeping? ____________________
   Does your child have a good appetite? _____________________________________________
   Eats a variety of foods? ____________________

11. Have there been any significant changes in your home or family relationships recently?
   ☐ Yes  ☐ No   If yes, please describe:
____________________________________________________________________________________

12. Optional Functional Questions – Younger students
   _______________________________________________________________________________

   b. Types of chores or responsibilities at home?
   _______________________________________________________________________________

   c. Self care skills: (Bathing, brushing teeth, toileting, etc.)
   _______________________________________________________________________________

   d. Behavior in the community: (Behavior in public places, can get to places nearby, orders meals, etc.)
   _______________________________________________________________________________

   e. Follows safety rules at home and in the community (walking, riding bike).
   _______________________________________________________________________________

   f. Leisure: Shares, has friends
   _______________________________________________________________________________

Optional Functional Questions – Older students

   _______________________________________________________________________________

   b. Types of chores or responsibilities at home?
   _______________________________________________________________________________

   c. Behavior in the community: Can get to places independently? Shops independently? Knowledge about places in the community like banks, post offices, gas stations, grocery stores, clothing stores? Other?
   _______________________________________________________________________________

   d. Follows safety rules and home and in the community (walking, riding, driving)?
      Self-care for minor injuries?
   _______________________________________________________________________________

   e. Leisure: Has friends? Participates in school or community activities?
   _______________________________________________________________________________

13. Do you have any suggestions for improving the school services being given to your child? ☐ Yes ☐ No
    If yes, what are they?
____________________________________________________________________________________

14. Is there any other information about your child that you think may be helpful to your child’s evaluation?
   ☐ Yes  ☐ No   If yes, what? ______________________________________________________________
Suggested Questions for Parent Input for Re-evaluation

Student’s Name: ___________________________ Parent/Guardian Name: ___________________________

Method of Interview (Check one): □ Personal Interview □ Telephone □ Written

Person collected input: ___________________________ Date: ___________________________

1. What are some of your child’s strengths, interests and/or favorite activities?

_____________________________________________________________________________________
_____________________________________________________________________________________

2. What goals do you have for your child for this school year? For older students, long range goals/plans?

_____________________________________________________________________________________

3. Have you seen improvement in your child’s academic performance / behavior / speech and language during the past 3 years? □ Yes □ No Please describe:

_____________________________________________________________________________________
_____________________________________________________________________________________

4. Do you have any current concerns about your child’s progress?

_____________________________________________________________________________________
_____________________________________________________________________________________

5. Have you seen any recent changes in your child’s behavior or school performance? □ Yes □ No
   If yes, please explain:

_____________________________________________________________________________________

6. Medical information:

   Vision concerns? ___________________________
   Wears glasses? ___________________________
   Hearing concerns? ___________________________
   Wears hearing aid(s)? ___________________________

   Any other medical/health concerns?

   Medical history: accidents, injuries, surgeries?

   Taking medication (Type, reason, side effects)?

   Any psychological (thinking/emotional) concerns?

_____________________________________________________________________________________

7. Has your child had a psychological or education evaluation from outside of the school in the last 3 years? □ Yes □ No  If yes, who did it, when was it done, and what were the results?

_____________________________________________________________________________________

8. Has your child had additional community services in the last 3 years (tutoring, counseling, residential care)? □ Yes □ No  If yes, please describe:

_____________________________________________________________________________________

9. With whom does your child live at home?

_____________________________________________________________________________________

10. Have there been any significant changes in your home or family relationships during the last 3 years? □ Yes □ No  If yes, please describe:

_____________________________________________________________________________________

12
11. Optional Functional Questions – Younger students

________________________________________________________________________________

b. Types of chores or responsibilities at home?
________________________________________________________________________________

c. Self care skills: (Bathing, brushing teeth, toileting, etc.)
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d. Behavior in the community: (Behavior in public places, can get to places nearby, orders meals, etc.)
________________________________________________________________________________

e. Follows safety rules at home and in the community (walking, riding bike).
________________________________________________________________________________

f. Leisure: Shares, has friends
________________________________________________________________________________

Optional Functional Questions – Older students

________________________________________________________________________________

b. Types of chores or responsibilities at home?
________________________________________________________________________________

c. Behavior in the community: Can get to places independently? Shops independently? Knowledge about places in the community like banks, post offices, gas stations, grocery stores, clothing stores? Other?
________________________________________________________________________________

d. Follows safety rules and home and in the community (walking, riding, driving)?
   Self-care for minor injuries?
________________________________________________________________________________

e. Leisure: Has friends? Participates in school or community activities?
________________________________________________________________________________

12. Do you think your child continues to need special education services? □ Yes □ No
   Why?
________________________________________________________________________________

13. Do you have any suggestions for improving the school services being given to your child? □ Yes □ No
   If yes, what are they?
________________________________________________________________________________

14. Is there any other information about your child that you think may be helpful to your child's 3-year re-evaluation? □ Yes □ No
   If yes, what?
Teacher Anecdotal Report – Secondary/Intermediate

Student’s Name: _____________________________ Teacher: __________________
Grade: _____ Subject: _____________________ Absences to Date: __________

Part 1 – Academic information. Check one item.

_____ The student currently meets or exceeds the minimal academic expectations of this class.
Current letter grade or percent: _____.

_____ The student does not currently meet the minimal academic expectations of this class.
Current letter grade or percent: _____.

Check concerns in the following areas (check all that apply).

- [ ] Reading decoding
- [ ] Reading comprehension
- [ ] Writing mechanics
- [ ] Math problem solving
- [ ] Understanding directions, lecture, discussions or demonstrations (listening comprehension)

- [ ] Reading fluency
- [ ] Writing meaningful, accurate sentences/passages
- [ ] Spelling
- [ ] Math facts
- [ ] Speaking skills

- [ ] Reading vocabulary
- [ ] Math computation

- [ ] Other / Comments: __________________________________________________________

Part 2 – Behavioral information – Rate each item.

<table>
<thead>
<tr>
<th>On time for class</th>
<th>Usually</th>
<th>Sometimes</th>
<th>Seldom/Never</th>
<th>N/A</th>
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<tr>
<td>Brings necessary materials</td>
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<td>Turns in completed assignments</td>
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<td>Willing to make-up assignments</td>
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<tr>
<td>Follows teacher’s directions</td>
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<td>Participates in class discussions</td>
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<td>Stays on-task during work time</td>
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<td>Appropriate peer interactions</td>
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<tr>
<td>Appropriate teacher interactions</td>
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Part 3 – Student’s Strengths / Other Comments: _________________________________

________________________________________________________
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Teacher’s Signature: ___________________________ Date: ____________
Teacher Anecdotal Report – Elementary

Student’s Name: ____________________________  Teacher: _______________
Grade: ______ Absences to Date: _________

Part 1 – Academic information. Check one item.

_____ The student currently meets or exceeds the minimal academic expectations in all subjects.

_____ The student does not currently meet the minimal grade-level academic expectations in the following areas (check all that apply):

___ Reading decoding   ___ Reading fluency   ___ Reading vocabulary
___ Reading comprehension   ___ Writing meaningful, accurate sentences/passages
___ Writing mechanics   ___ Spelling   ___ Math computation
___ Math problem solving   ___ Math facts   ___ Speaking skills
___ Understanding directions, lecture, discussions or demonstrations (listening comprehension)
___ Other/ Comments: ___________________________________________________________

____________________________________________

Part 2 – Behavioral information – Rate each item.

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Part 3 – Student’s Strengths / Other Comments: ______________________________

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

Teacher’s Signature: ____________________________________ Date: ___________
Classroom / Academic Observation Checklist – Pre-school / Kindergarten

Student: ___________________________________  Grade: ___  Teacher/Location: ________________________________
Observer: __________________________________  Date: ____________  Time: ____________  Activity: _____________

Directions: First, identify the area(s) of concern in the box below. Your observation should focus on the identified area(s). During the observation, place a check mark next to the behaviors that are listed within each domain that correlates with the noted area(s) of concern. These checklists are not exhaustive, so you may want make notes regarding other additional behavior observed, including strengths and behaviors which may interfere with the student’s learning. In order to obtain a full and accurate picture of the student’s performance, it may be necessary to observe the student more than once, possibly in different settings and at different times of the day. If a child 3-5 years old is not yet in a public school program, observations should be conducted in the child’s natural environment or early intervention program.

Check area(s) of concern for SLD evaluation:

☐ Oral Expression  ☐ Basic Reading  ☐ Reading Comprehension  ☐ Math Calculation
☐ Listening Comprehension  ☐ Reading Fluency  ☐ Written Expression  ☐ Math Problem Solving

Academic Skills

**Language** (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student has:

☐ Grade appropriate skills  ☐ Difficulty re-telling what has just been said
☐ Difficulty modulating voice (e.g., too soft, too loud)  ☐ Slow/halting speech, using fillers (e.g., uh, you know, um)
☐ Difficulty naming people or objects  ☐ Difficulty with pronouncing words
☐ Difficulty staying on topic  ☐ Difficulty rhyming
☐ Difficulty in explaining things (e.g. feelings, ideas) due to lack of vocabulary, articulation, and/or grammar skills  ☐ Difficulty with phonemic awareness tasks (e.g., saying initial sounds, saying sounds of words, saying words fast)
☐ Difficulty understanding instructions or directions  ☐ Limited interest in books or stories

Notes:
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**Reading** (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:

☐ Grade appropriate skills  ☐ Difficulty reading short, irregular sight words
☐ Difficulty identifying sounds  ☐ Difficulty retelling what has been read
☐ Difficulty blending sounds into words  ☐ Difficulty with retention of new vocabulary
☐ Difficulty reading short, regular words  ☐ Difficulty demonstrating comprehension of sentences/stories

Notes:
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**Written Language** (Written Expression) - - Student has

☐ Grade appropriate skills  ☐ Difficulty with drawing familiar shapes
☐ Difficulty with holding writing instruments  ☐ Difficulty with naming, copying or writing letters
☐ Difficulty copying / tracing  ☐ Frequent letter, number, and symbol reversals

Notes:
____________________________________________________________________________________________________
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____________________________________________________________________________________________________
Preschool / Kindergarten - Pg. 2

<table>
<thead>
<tr>
<th>Math (Math Calculation, Math Problem Solving) - - Student has:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Grade appropriate skills</td>
</tr>
<tr>
<td>☐ Difficulty counting aloud</td>
</tr>
<tr>
<td>☐ Difficulty in one-to one correspondence when counting objects</td>
</tr>
</tbody>
</table>

Notes:
____________________________________________________________________________________________________
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Functional Skills

<table>
<thead>
<tr>
<th>Social Emotional (All Areas) - - Student has:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Age appropriate skills</td>
</tr>
<tr>
<td>☐ Difficulty ‘joining in’ and maintaining positive social status in a peer group.</td>
</tr>
<tr>
<td>☐ Difficulty with sharing (e.g., objects, teacher’s time)</td>
</tr>
</tbody>
</table>

Notes:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
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Attention (All Areas) - - Student has

| ☐ Age appropriate skills | ☐ Difficulty sustaining attention in work or play activities |

Notes:
____________________________________________________________________________________________________
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Gross and Fine Motor Skills (All Areas) - - Student:

| ☐ Has age appropriate skills | ☐ Demonstrates poor ability to color or write ‘within the lines’ |
| ☐ Appears awkward and clumsy, dropping, spilling, or knocking things over | ☐ Grasps writing instruments awkwardly, resulting in poor handwriting, drawing |
| ☐ Has trouble with buttons, zippers, hooks, snaps and tying shoes | ☐ Has difficulty using small objects or items that demand precision (e.g., legos, puzzle pieces, scissors) |
| ☐ Creates art work that is immature for age |

Notes:
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Summary:
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Classroom / Academic Observation Checklist – Grades 1 - 4

Student: ___________________________ Grade: ___ Teacher/Location: ________________________________
Observer: __________________________ Date: ____________ Time: ____________ Activity: _____________

Directions: First, identify the area(s) of concern in the box below. Your observation should focus on the identified area(s). During the observation, place a check mark next to the behaviors that are listed within each domain that correlates with the noted area(s) of concern. These checklists are not exhaustive, so you may want to make notes regarding other additional behavior observed, including strengths and behaviors which may interfere with the student’s learning. In order to obtain a full and accurate picture of the student’s performance, it may be necessary to observe the student more than once, possibly in different settings and at different times of the day.

<table>
<thead>
<tr>
<th>Check area(s) of concern for SLD evaluation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Oral Expression</td>
</tr>
<tr>
<td>□ Listening Comprehension</td>
</tr>
</tbody>
</table>

### Academic Skills

#### Language (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student has:

<table>
<thead>
<tr>
<th>Grade appropriate</th>
<th>Difficulty re-telling what has just been said</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficulty modulating voice (e.g., too soft, too loud)</td>
<td>Slow/halting speech, using fillers (e.g., uh, you know, um)</td>
</tr>
<tr>
<td>Difficulty naming people or objects</td>
<td>Difficulty with pronouncing words</td>
</tr>
<tr>
<td>Difficulty staying on topic</td>
<td>Difficulty rhyming</td>
</tr>
<tr>
<td>Difficulty in explaining things (e.g. feelings, ideas) due to use of imprecise language and limited vocabulary</td>
<td>Difficulty with phonemic awareness tasks (e.g., saying initial sounds, saying sounds of words, saying words fast)</td>
</tr>
<tr>
<td>Difficulty understanding instructions or directions</td>
<td>Poor grammar or misuses words in conversation</td>
</tr>
<tr>
<td>Inserts malapropisms into conversation</td>
<td>Difficulty with pragmatic skills (e.g., understands the relationship between speaker and listener, staying on topic, making inferences)</td>
</tr>
</tbody>
</table>

Notes:

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

#### Reading (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:

<table>
<thead>
<tr>
<th>Grade appropriate skills</th>
<th>Slow oral reading skills that may interfere with comprehension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Difficulty identifying sounds, blending sounds into words</td>
<td>Difficulty retelling what has been read</td>
</tr>
<tr>
<td>Difficulty reading regular words</td>
<td>Difficulty with retention of new vocabulary</td>
</tr>
<tr>
<td>Difficulty reading irregular sight words</td>
<td>Difficulty demonstrating comprehension of sentences/stories</td>
</tr>
<tr>
<td>Difficulty when reading sentences; may frequently lose place, omit words, insert words, substitute words, guess from initial sounds, reverse words, make self-corrections</td>
<td></td>
</tr>
</tbody>
</table>

Notes:

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
Grades 1 to 4 – Pg. 2

### Written Language (Written Expression) - - Student has:

<table>
<thead>
<tr>
<th>☐ Grade appropriate skills</th>
<th>☐ Frequent reversals of letters and numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Difficulty with holding writing instruments</td>
<td>☐ Uneven spacing between letters and words, has trouble staying ‘on the line’</td>
</tr>
<tr>
<td>☐ Messy and incomplete writing, with many cross-outs and erasures</td>
<td>☐ Inaccurate copying skills (e.g., confuses similar-looking letters and numbers)</td>
</tr>
<tr>
<td>☐ Difficulty remembering shapes of letters and numbers</td>
<td>☐ Poor and inconsistent spelling</td>
</tr>
<tr>
<td>☐ Difficulty proofreading and self-correcting work</td>
<td>☐ Complete written assignments</td>
</tr>
</tbody>
</table>

Notes:

________________________________________________________________________________________________________________________________________________________________________________________________________________________

### Math (Math Calculation, Math Problem Solving) - - Student has:

<table>
<thead>
<tr>
<th>☐ Grade appropriate skills</th>
<th>☐ Difficulty with comparisons</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Difficulty with simple counting and one-to-one correspondence between number and objects</td>
<td>☐ Difficulty telling time or conceptualizing the passage of time</td>
</tr>
<tr>
<td>☐ Difficulty counting by other numbers (2’s, 5’s, 10’s)</td>
<td>☐ Difficulty solving one-step word problems</td>
</tr>
<tr>
<td>☐ Difficulty estimating quantity (e.g., quantity, value)</td>
<td>☐ Difficulty solving facts and longer operations</td>
</tr>
</tbody>
</table>

Notes:

________________________________________________________________________________________________________________________________________________________________________________________________________________________

### Functional Skills

### Social Emotional (All Areas) - - Student has:

<table>
<thead>
<tr>
<th>☐ Age appropriate skills</th>
<th>☐ Difficulty with self-control when frustrated.</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Difficulty ‘joining in’ and maintaining positive social status in a peer group.</td>
<td>☐ Difficulty using other students as models to cue self on appropriate behavior</td>
</tr>
<tr>
<td>☐ Difficulty in ‘picking up’ on other people’s moods/feelings</td>
<td>☐ Difficulty knowing how to share/express feelings</td>
</tr>
<tr>
<td>☐ Difficulty detecting or responding appropriately to teasing</td>
<td>☐ Difficulty dealing with group pressure, embarrassment and unexpected challenges</td>
</tr>
<tr>
<td>☐ Difficulty in understanding the social hierarchy (students, teachers, administrators) of school</td>
<td>☐ Difficulty in following directions – may be a can’t do (lack of vocabulary) or a won’t do problem</td>
</tr>
</tbody>
</table>

Notes:

________________________________________________________________________________________________________________________________________________________________________________________________________________________

### Attention (All Areas) - - Student has:

<table>
<thead>
<tr>
<th>☐ Age appropriate skills</th>
<th>☐ Difficulty sustaining attention in work or play activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Difficulty organizing tasks and activities</td>
<td>☐ Difficulty with losing things that are necessary for tasks</td>
</tr>
<tr>
<td>☐ Difficulty with remembering daily/routine activities</td>
<td>☐ Difficulty by being easily distracted</td>
</tr>
</tbody>
</table>

Notes:

________________________________________________________________________________________________________________________________________________________________________________________________________________________
<table>
<thead>
<tr>
<th><strong>Gross and Fine Motor Skills (All Areas)</strong> - Student:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>□ Has age appropriate skills</td>
<td>□ Demonstrates poor ability to color or write ‘within the lines’</td>
</tr>
<tr>
<td>□ Appears awkward and clumsy, dropping, spilling, or knocking things over</td>
<td>□ Grasps writing instruments awkwardly, resulting in poor handwriting, drawing</td>
</tr>
<tr>
<td>□ Has trouble with buttons, zippers, hooks, snaps and tying shoes</td>
<td>□ Has difficulty using small objects or items that demand precision (e.g., legos, puzzle pieces, scissors)</td>
</tr>
<tr>
<td>□ Creates art work that is immature for age</td>
<td>□ Has limited success with games and activities that demand eye-to-hand coordination (e.g. musical instruments, sports)</td>
</tr>
</tbody>
</table>

**Notes:**
____________________________________________________________________________________________________
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**Other Notes or Observed Behavior** - Student:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

**Summary:**
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
Classroom / Academic Observation Checklist – Grades 5 - 8

Student: ___________________________________ Grade: ___ Teacher/Location: ________________________________
Observer: __________________________________ Date: ____________ Time: ____________ Activity: _____________

Directions: First, identify the area(s) of concern in the box below. Your observation should focus on the identified area(s). During the observation, place a check mark next to the behaviors that are listed within each domain that correlates with the noted area(s) of concern. These checklists are not exhaustive, so you may want make notes regarding other additional behavior observed, including strengths and behaviors which may interfere with the student’s learning. In order to obtain a full and accurate picture of the student’s performance, it may be necessary to observe the student more than once, possibly in different settings and at different times of the day.

Check area(s) of concern for SLD evaluation:
☐ Oral Expression ☐ Basic Reading ☐ Reading Comprehension ☐ Math Calculation
☐ Listening Comprehension ☐ Reading Fluency ☐ Written Expression ☐ Math Problem Solving

Academic Skills

**Language** (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student:
☐ Has grade appropriate skills ☐ Has difficulty re-telling what has just been said
☐ Has difficulty modulating voice (e.g., too soft, too loud) ☐ Inserts malapropisms into conversation
☐ Difficulty naming people or objects ☐ Difficulty with pronouncing words
☐ Difficulty staying on topic ☐ Poor grammar or misuses words in conversation
☐ Has difficulty in explaining things (e.g. feelings, ideas) due to use of imprecise language and limited vocabulary ☐ Difficulty with pragmatic skills (e.g., understands the relationship between speaker and listener, staying on topic, making inferences)
☐ Has difficulty understanding instructions or directions ☐ Has slow/halting speech, using fillers (e.g., uh, you know, um)

Notes:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
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Reading (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:
☐ Grade appropriate skills ☐ Difficulty re-telling what has been read
☐ Difficulty reading grade level sight words ☐ Difficulty with retention of new vocabulary
☐ Difficulty reading common words seen in school/community ☐ Difficulty demonstrating literal comprehension of sentences/stories
☐ Difficulty when reading sentences; may frequently lose place, omit words, insert words, substitute words, guess from initial sounds, reverse words, make self-corrections ☐ Difficulty demonstrating inferential comprehension of stories and connections between stories
☐ Slow oral reading skills that may interfere with comprehension

Notes:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
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____________________________________________________________________________________________________
**Grades 5 to 8 – Pg. 2**

<table>
<thead>
<tr>
<th>Written Language (Written Expression) - - Student has:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Grade appropriate skills</td>
</tr>
<tr>
<td>☐ Difficulty proofreading and self-correcting work</td>
</tr>
<tr>
<td>☐ Messy and incomplete writing, with many cross-outs and erasures</td>
</tr>
<tr>
<td>☐ Poor and inconsistent spelling</td>
</tr>
<tr>
<td>☐ Uneven spacing between letters and words, has trouble staying ‘on the line’</td>
</tr>
<tr>
<td>☐ Difficulty developing ideas in writing so written work is incomplete and too brief.</td>
</tr>
<tr>
<td>☐ Inaccurate copying skills (e.g., confuses similar-looking letters and numbers)</td>
</tr>
<tr>
<td>☐ Difficulty completing written assignments</td>
</tr>
</tbody>
</table>

Notes:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

<table>
<thead>
<tr>
<th>Math (Math Calculation, Math Problem Solving) - - Student has:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Grade appropriate skills</td>
</tr>
<tr>
<td>☐ Difficulty with comparisons (e.g., less than, greater than)</td>
</tr>
<tr>
<td>☐ Difficulty counting by single digit numbers, 10’s 100’s</td>
</tr>
<tr>
<td>☐ Difficulty telling time or conceptualizing the passage of time</td>
</tr>
<tr>
<td>☐ Difficulty aligning numbers resulting in computation errors</td>
</tr>
<tr>
<td>☐ Difficulty solving word problems</td>
</tr>
<tr>
<td>☐ Difficulty estimating quantity (e.g., quantity, value)</td>
</tr>
<tr>
<td>☐ Difficulty solving facts and longer operations</td>
</tr>
<tr>
<td>☐ Difficulty interpreting / creating charts and graphs</td>
</tr>
<tr>
<td>☐ Difficulty understanding / applying measurement concepts</td>
</tr>
</tbody>
</table>

Notes:
____________________________________________________________________________________________________
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<table>
<thead>
<tr>
<th>Functional Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Emotional (All Areas) - - Student has:</td>
</tr>
<tr>
<td>☐ Age appropriate skills</td>
</tr>
<tr>
<td>☐ Difficulty with self-control when frustrated.</td>
</tr>
<tr>
<td>☐ Difficulty ‘joining in’ and maintaining positive social status in a peer group.</td>
</tr>
<tr>
<td>☐ Difficulty using other students as models to cue self on appropriate behavior</td>
</tr>
<tr>
<td>☐ Difficulty in ‘picking up’ on other people’s moods/feelings</td>
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<tr>
<td>☐ Difficulty knowing how to share/express feelings</td>
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<td>☐ Difficulty detecting or responding appropriately to teasing</td>
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<td>☐ Difficulty dealing with group pressure, embarrassment and unexpected challenges</td>
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<tr>
<td>☐ Difficulty in understanding the social hierarchy (students, teachers, administrators) of school</td>
</tr>
<tr>
<td>☐ Difficulty in following directions – may be a can’t do (lack of vocabulary) or a won’t do problem</td>
</tr>
<tr>
<td>☐ Difficulty with ‘getting to the point’ (e.g., gets bogged down in details in conversation)</td>
</tr>
</tbody>
</table>

Notes:
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________

### Attention (All Areas) - - Student has:

- ☐ Age appropriate skills
- ☐ Difficulty sustaining attention in work or play activities
- ☐ Difficulty organizing tasks and activities
- ☐ Difficulty with losing things that are necessary for tasks
- ☐ Difficulty with remembering daily/routine activities
- ☐ Difficulty by being easily distracted
- ☐ Fails to pay close attention to details or makes careless mistakes in schoolwork or other activities

### Gross and Fine Motor Skills (All Areas) - - Student:

- ☐ Has age appropriate skills
- ☐ Has limited success with games and activities that demand eye-to-hand coordination (e.g. musical instruments, sports)
- ☐ Appears awkward and clumsy, dropping, spilling, or knocking things over
- ☐ Grasps writing instruments awkwardly, resulting in poor handwriting, drawing

### Other Notes or Observed Behavior - - Student:

- ☐ Confuses left and right
- ☐ Is slow to learn new games and master puzzles
- ☐ Often loses things
- ☐ Has difficulty generalizing or applying skills from one situation to another
- ☐ Finds it hard to judge speed and distance
- ☐ Has trouble reading charts and maps
- ☐ Is disorganized and poor at planning
- ☐ Has difficulty listening and taking notes at the same time

### Summary:

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Classroom / Academic Observation Checklist – Grades 9 - 12

Student: ___________________________________ Grade: ___ Teacher/Location: ________________________________
Observer: __________________________________ Date: ____________ Time: ____________ Activity: _____________

Directions: First, identify the area(s) of concern in the box below. Your observation should focus on the identified area(s). During the observation, place a check mark next to the behaviors that are listed within each domain that correlates with the noted area(s) of concern. These checklists are not exhaustive, so you may want make notes regarding other additional behavior observed, including strengths and behaviors which may interfere with the student’s learning. In order to obtain a full and accurate picture of the student’s performance, it may be necessary to observe the student more than once, possibly in different settings and at different times of the day.

Check area(s) of concern for SLD evaluation:

<table>
<thead>
<tr>
<th>☐ Oral Expression</th>
<th>☐ Basic Reading</th>
<th>☐ Reading Comprehension</th>
<th>☐ Math Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Listening Comprehension</td>
<td>☐ Reading Fluency</td>
<td>☐ Written Expression</td>
<td>☐ Math Problem Solving</td>
</tr>
</tbody>
</table>

**Academic Skills**

**Language** (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student:

|☐ Has grade appropriate skills |☐ Has difficulty re-telling what has just been said |
|☐ Has difficulty modulating voice (e.g., too soft, too loud) |☐ Inserts malapropisms into conversation |
|☐ Confuses words with others that sound familiar |☐ Difficulty with pronouncing words |
|☐ Difficulty staying on topic |☐ Poor grammar or misuses words in conversation |
|☐ Has difficulty in explaining things (e.g. feelings, ideas) due to use of imprecise language and limited vocabulary |☐ Difficulty with pragmatic skills (e.g., understands the relationship between speaker and listener, staying on topic, making inferences) |
|☐ Has difficulty understanding instructions or directions |☐ Has slow/halting speech, using fillers (e.g., uh, you know, um) |

Notes:

____________________________________________________________________________________________________
____________________________________________________________________________________________________
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**Reading** (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:

|☐ Grade appropriate skills |☐ Difficulty retelling what has been read |
|☐ Difficulty reading content area sight words |☐ Difficulty with retention of new vocabulary |
|☐ Difficulty reading common words seen in school/community |☐ Difficulty demonstrating literal comprehension of sentences/stories |
|☐ Difficulty when reading sentences; may frequently lose place, omit words, insert words, substitute words, guess from initial sounds, reverse words, make self-corrections |☐ Difficulty demonstrating inferential comprehension of stories and connections between stories/ideas |
|☐ Slow oral reading skills that may interfere with comprehension |☐ |

Notes:

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
### Written Language (Written Expression) - - Student has:

- Grade appropriate skills
- Difficulty proofreading and self-correcting work
- Messy and incomplete writing, with many cross-outs and erasures
- Difficulty developing ideas in writing so written work is incomplete and too brief.
- Inaccurate copying skills (e.g., confuses similar-looking letters and numbers)
- Difficulty completing written assignments

### Math (Math Calculation, Math Problem Solving) - - Student has:

- Grade appropriate skills
- Difficulty with comparisons (e.g., less than, greater than)
- Difficulty counting by single digit numbers, 10’s 100’s
- Difficulty telling time or conceptualizing the passage of time
- Difficulty aligning numbers resulting in computation errors
- Difficulty solving word problems
- Difficulty estimating quantity (e.g., quantity, value)
- Difficulty solving facts and longer operations
- Difficulty interpreting / creating charts and graphs
- Difficulty understanding / applying measurement concepts

### Functional Skills

### Social Emotional (All Areas) - - Student has:

- Age appropriate skills
- Difficulty with self-control when frustrated.
- Difficulty ‘joining in’ and maintaining positive social status in a peer group.
- Difficulty using other students as models to cue self on appropriate behavior
- Difficulty in ‘picking up’ on other people’s moods/feelings
- Difficulty knowing how to share/express feelings
- Difficulty detecting or responding appropriately to teasing
- Difficulty dealing with group pressure, embarrassment and unexpected challenges
- Difficulty in understanding the social hierarchy (students, teachers, administrators) of school
- Difficulty in following directions – may be a can’t do (lack of vocabulary) or a won’t do problem
- Difficulty with ‘getting to the point’ (e.g., gets bogged down in details in conversation)

Notes:

____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
____________________________________________________________________________________________________
### Attention (All Areas) - - Student has:

- □ Age appropriate skills
- □ Difficulty sustaining attention in work or play activities
- □ Difficulty organizing tasks and activities
- □ Difficulty with losing things that are necessary for tasks
- □ Difficulty with remembering daily/routine activities
- □ Difficulty by being easily distracted
- □ Fails to pay close attention to details or makes careless mistakes in schoolwork or other activities

### Gross and Fine Motor Skills (All Areas) - - Student:

- □ Has age appropriate skills
- □ Has limited success with games and activities that demand eye-to-hand coordination (e.g. musical instruments, sports)
- □ Appears awkward and clumsy, dropping, spilling, or knocking things over
- □ Grasps writing instruments awkwardly, resulting in poor handwriting, drawing

### Other Notes or Observed Behavior - - Student:

- □ Confuses left and right
- □ Is slow to learn new games and master puzzles
- □ Often loses things
- □ Has difficulty generalizing or applying skills from one situation to another
- □ Finds it hard to judge speed and distance
- □ Has trouble reading charts and maps
- □ Is disorganized and poor at planning
- □ Has difficulty listening and taking notes at the same time

### Summary:

- □
- □
- □
- □
- □
- □
- □
- □
- □
- □
- □
### Worksheet for Charting Patterns of Strengths and Weaknesses

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>Strength</th>
<th>Weakness</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Progress monitoring</strong></td>
<td>Meeting / exceeding aimline</td>
<td>Falling below aimline for at least 4 consecutive weeks on most recent tests.</td>
</tr>
<tr>
<td><strong>CBM (Benchmark) screening</strong></td>
<td>At ‘benchmark’ level or above grade-level median score if using local norms.</td>
<td>At ‘at-risk’ level or below 10%ile if using local norms.</td>
</tr>
<tr>
<td><strong>Criterion-referenced assessment</strong></td>
<td>Skills at or above grade level</td>
<td>Skills well below grade level</td>
</tr>
<tr>
<td><strong>MEAP</strong></td>
<td>Level 1 or Level 2</td>
<td>Level 3 or Level 4</td>
</tr>
<tr>
<td><strong>Norm-referenced tests (Achievement, IQ)</strong></td>
<td>Percentile rank ≥ 30</td>
<td>Percentile rank ≤ 9</td>
</tr>
<tr>
<td><strong>Curriculum assessments</strong></td>
<td>Scores ≥ 80%</td>
<td>Scores ≤ 60%</td>
</tr>
<tr>
<td><strong>Grades</strong></td>
<td>A / B or ‘meets / exceeds’ expectations</td>
<td>D / E or ‘does not meet’ expectations</td>
</tr>
<tr>
<td><strong>Teacher report</strong></td>
<td>Based upon professional judgment of teacher in comparing student to others in classroom.</td>
<td>Based upon professional judgment of teacher in comparing student to others in classroom.</td>
</tr>
<tr>
<td><strong>Observations – Academic</strong></td>
<td>Student demonstrates average understanding of academic content in comparison to other students in classroom.</td>
<td>Student demonstrates that s/he does not understand the academic content.</td>
</tr>
<tr>
<td><strong>Observations/Interviews/Scales - Functional</strong></td>
<td>Student demonstrates typical functional skills in comparison to other students the same age or in the same grade. Percentile rank on scale ≥ 30.</td>
<td>Most of the student’s functional skills appear to be well below average in comparison to other students the same age or in the same grade. Percentile rank on scale ≤ 9.</td>
</tr>
</tbody>
</table>

**S = Strength**

**N = Neither Strength/Weakness**

**W = Weakness**

**Area(s) of Strength (at least 3 ‘S’ checks for each area):**

**Area(s) of Weakness (at least 4 ‘W’ checks for each area, including at least 1 individually administered academic achievement assessment):**

### Suggested Guidelines for Determining Strengths and Weakness

- **Academic achievement** with respect to grade-level expectations.
- **Academic achievement** with respect to age-level expectations.
- **Classroom performance** with respect to grade-level expectations.
- **Age-appropriate functional / intellectual skills**

<table>
<thead>
<tr>
<th>Basic Reading</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
<th>S N W</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading Fluency</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
</tr>
<tr>
<td>Reading Comp.</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
</tr>
<tr>
<td>Listening Comp.</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
<td>S N W</td>
</tr>
</tbody>
</table>

**Observation, interviews, IQ assessment**

---

**Note:**

- S = Strength
- N = Neither Strength/Weakness
- W = Weakness

---

**Course Information:**

- **Academic achievement** with respect to grade-level expectations.
- **Academic achievement** with respect to age-level expectations.
- **Classroom performance** with respect to grade-level expectations.
- **Age-appropriate functional / intellectual skills**

---

**Progress monitoring, CBM screening or criterion-referenced assessments**

**MEAP**

**Norm-referenced achievement tests**

**Curriculum assessments**

**Grades**

**Teacher report**

**Classroom observation**

---

**Suggested Guidelines for Determining Strengths and Weakness**

- **Assessment Type**
  - Progress monitoring
  - CBM (Benchmark) screening
  - Criterion-referenced assessment
  - MEAP
  - Norm-referenced tests (Achievement, IQ)
  - Curriculum assessments
  - Grades
  - Teacher report
  - Observations – Academic
  - Observations/Interviews/Scales - Functional

- **Strength**
  - Meeting / exceeding aimline
  - At ‘benchmark’ level or above grade-level median score if using local norms.
  - Skills at or above grade level
  - Level 1 or Level 2
  - Percentile rank ≥ 30
  - Scores ≥ 80%
  - A / B or ‘meets / exceeds’ expectations
  - Based upon professional judgment of teacher in comparing student to others in classroom.
  - Student demonstrates average understanding of academic content in comparison to other students in classroom.
  - Student demonstrates typical functional skills in comparison to other students the same age or in the same grade. Percentile rank on scale ≥ 30.

- **Weakness**
  - Falling below aimline for at least 4 consecutive weeks on most recent tests.
  - At ‘at-risk’ level or below 10%ile if using local norms.
  - Skills well below grade level
  - Level 3 or Level 4
  - Percentile rank ≤ 9
  - Scores ≤ 60%
  - D / E or ‘does not meet’ expectations
  - Based upon professional judgment of teacher in comparing student to others in classroom.
  - Student demonstrates that s/he does not understand the academic content.
  - Most of the student’s functional skills appear to be well below average in comparison to other students the same age or in the same grade. Percentile rank on scale ≤ 9.
### Examples of Published Assessments
(This is not a complete list)

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>Examples:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Progress monitoring, Benchmark screening</td>
<td>DIBELS, AIMSweb, Yearly Progress Pro, EdCheckup</td>
</tr>
<tr>
<td>Criterion-referenced assessments</td>
<td>Brigance</td>
</tr>
<tr>
<td>IQ tests</td>
<td>WISC-4, WAIS-4, KABC-2, KAIT-2, CTONI-2, KBIT-2, WASI</td>
</tr>
<tr>
<td>Curriculum assessments aligned with CE’s and classroom instruction</td>
<td>District assessments, Classroom assessments</td>
</tr>
</tbody>
</table>
## Worksheet to Determine Appropriate Instruction

<table>
<thead>
<tr>
<th>Elements of Instruction</th>
<th>Evidence of Effectiveness</th>
<th>Other Evidence of Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documented curriculum</td>
<td>School district has a written curriculum that is aligned with State content expectations.</td>
<td>At least 80% of all of the school district’s students within a grade are meeting district or state standards after being instructed with the district’s core instructional program.</td>
</tr>
<tr>
<td>Core/intervention curriculum materials</td>
<td>Materials systematically teach and review skills and have scientific-research evidence of effectiveness. (See Worksheet for Evaluating Explicit Instruction and Systematic Curriculum)</td>
<td>At least 80% of students using an intervention within the school have showed improved progress.</td>
</tr>
<tr>
<td>Reading</td>
<td>Instruction emphasizes the following big ideas: phonemic awareness, phonics, fluency, vocabulary and comprehension.</td>
<td>Observations of interventions during the evaluation period indicate that they are being implemented with fidelity.</td>
</tr>
<tr>
<td>Math</td>
<td>Instruction emphasizes the following big ideas: conceptual understanding, computational and procedural fluency, fact fluency and problem solving skills.</td>
<td></td>
</tr>
<tr>
<td>Writing</td>
<td>Instruction emphasizes the following areas: basic mechanics and conventions, the content aspects of writing that convey meaning, and higher-level cognitive processes involved in planning and revising.</td>
<td></td>
</tr>
<tr>
<td>Oral Expression</td>
<td>Instruction emphasizes the use of syntax, semantics and morphology.</td>
<td></td>
</tr>
<tr>
<td>Listening Comprehension</td>
<td>Instruction emphasizes the understanding of syntax, semantics and morphology.</td>
<td></td>
</tr>
<tr>
<td>Teacher Qualifications</td>
<td>Teacher meets NCLB highly qualified standards and has been trained to use the curriculum materials.</td>
<td></td>
</tr>
<tr>
<td>Instructional techniques/strategies</td>
<td>When teaching new skills, teacher uses explicit instructional techniques. (See Worksheet for Evaluating Explicit Instruction and Systematic Curriculum)</td>
<td></td>
</tr>
<tr>
<td>Differentiated/tiered instruction</td>
<td>Students are provided with the appropriate intensity of instruction to meet their individual needs. All students receive core instruction, some students receive targeted, strategic instruction, and a few students receive targeted intensive instruction.</td>
<td></td>
</tr>
<tr>
<td>Fidelity of instructional implementation</td>
<td>There is documentation that the core and intervention programs are implemented with fidelity. (See Program/Instruction Fidelity Checklist)</td>
<td></td>
</tr>
<tr>
<td>Assessments / Use of data</td>
<td>School screens all students three times a year to assess their progress. Students receiving strategic interventions are assessed weekly/monthly with formative assessments (e.g., progress monitoring tests) and students receiving intensive interventions (through general or special education) are assessed weekly. Schools regularly use assessment data to evaluate their instructional programs and modify accordingly.</td>
<td></td>
</tr>
</tbody>
</table>
**EXCLUSIONARY FACTORS WORKSHEET**  
**Specific Learning Disability**

Mark each exclusionary factor. Each factor must be ruled out as the PRIMARY FACTOR for the student’s inability to progress in the general education curriculum.

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lack of instruction in essential components of reading and math</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does information obtained during assessment indicate lack of appropriate instruction in reading and math as the determinant factor in this student’s inability to progress in the general education curriculum?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report Page</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. **Limited English Proficiency**  
Answer the following questions

- Is there a language other than English spoken by this student?  
- Is there a language other than English spoken by the student’s home?  
- Are there any specific dialect or cultural influences that would affect the student’s ability to speak or understand English?  

Is limited English proficiency the primary reason for the student’s deficit scores? Rpt. Page_______

3. **Cognitive Impairment**  
Document all information gathered in assessment that would exclude cognitive impairment as the determinant factor for this student’s academic deficits.

- Do you have evidence, through interviews, observations and/or testing that the student has a cognitive impairment? Report Page ______

4. **Emotional Impairment**  
Document all information gathered in assessment that would exclude emotional impairment as the determinant factor for this student’s academic deficits.

- Does the student exhibit emotional difficulties that interfere with learning?  
- Does the student have a medical history and/or school history of emotional difficulties?  

Is emotional disturbance the primary reason for the student’s deficit scores? Rpt. Pg. ___

5. **Vision, Hearing, or Motor Impairments**  
Document all information gathered in assessment that would exclude vision, hearing, or motor impairments as the determinant factor for this student’s academic deficits.

- Do vision screening results indicate concern?  
- Do hearing screening results indicate concern?  
- Does the student have a history of significantly delayed motor development?  

Is visual, hearing or motor disability the primary reason for the student’s deficit scores? Rpt. Pg._____

6. **Environmental, Cultural, or Economic Disadvantage**  
Document all information gathered in assessment that would exclude environmental, cultural, or economic disadvantage as the determinant factor for this student’s academic deficits.

a. **Lack of Opportunity**  
- Does the assessment data indicate that lack of opportunity to learn due to environmental, cultural or economic disadvantage is not the cause of the student’s academic deficits?

b. **Motivational Factors**  
- Does the student attempt classroom assignments and/or homework?  
- If no, is the student’s performance on grade level during classroom activities?  
- Are group achievement scores consistent with the student’s grades?  
- Does information gathered indicate lack of motivation is the determinant factor?

c. **Situational Trauma**  
- Has the student’s academic performance fallen dramatically within the last 6-12 months?  
- Is there knowledge of any situations within the student’s family that would contribute to a drop in academic performance?  
- Does information gathered indicate situational trauma is the determinant factor?

d. **Attendance**  
- Does the student have a high absentee rate either due to illness, disciplinary issues or other factors?  
- Does information gathered indicate that absences are the determinant factor?  

Are environmental, cultural or economic disadvantage the primary reason for the student’s academic deficits? Report page_______
INITIAL EVALUATION REPORT (SLD) - EXAMPLE

Student: Date of Birth:
Grade: Dates of Evaluation:
Teacher: Age:
School: Parent/Guardian:
Report Date:

1. Multidisciplinary Evaluation Team Members:

2. Reason for Evaluation:

3. Purpose of Evaluation:

The evaluation will address five major considerations:

1. Assess the student’s rate of academic progress to meet age or grade level content expectations when using a process based on the student’s response to scientific, research-based intervention (RtI) and/or identify a pattern of strengths and weaknesses in the student’s classroom performance, achievement on tests, or both relative to age, grade level content expectations or intellectual development.

2. Use the assessment results to identify if the student’s performance is inadequate for the student’s age or to meet grade level content expectations.

3. Verify that any underachievement is not primarily the result of a lack of appropriate instruction or due to other factors/disabilities.

4. If there is a learning disability determine whether it adversely affects the student’s educational performance to the point that special education is necessary.

5. Use the evaluation information to assist in planning future appropriate interventions.

4. Evaluation Information Used in this Report (Select/add appropriate information and elaborate)

Examples:

1. State/district achievement test data
2. School achievement test data (e.g., screening tests, curriculum tests)
3. Classroom data (e.g., grades, work samples, test data)
4. Assessments/scales administered for this evaluation.
5. Information on the student’s instructional program in reading, math and other areas of concern.
6. Information on the intervention programs and strategies used, including teacher qualifications and fidelity assurances.
7. Information on repeated progress monitoring or other formative assessments in the area(s) of concern.
8. Documentation of parent notification.
10. Teacher reports.
11. Medical information.
12. Information on cultural, environmental and economic factors that may impact the student’s academic performance.
13. Observation of academic performance and behavior in the area(s) of concern.
14. Attendance data and other pertinent school history information.

5. Documentation of parental notification on the evaluation request and their due process rights:

If an RtI process was used to determine eligibility, the parent had to be also notified about:
   1. The State’s policies regarding the amount and nature of student performance data that would be collected and the general education services that would be provided.
   2. Strategies for increasing the student’s rate of learning.
   3. The parent’s right to request an evaluation.

6. Parent input (possible items to address):

How well the student understands and follows directions in home chores, running errands, conveying phone messages
When is the student most/least attentive
Academic skill performed independently, e.g., reading game directions, earning/handling money, writing messages, computer skills, completing projects
Social, behavioral, adaptive skills
Medical or psychological background
Cultural, ethnic and family background

7. Teacher input (possible items to address):

Participation in class discussion
Ability to attend to task
Academic, social and behavioral strengths/concerns
Work initiation and completion rates
Other factors that may be enhancing or limiting academic performance
Student interests

ASSURANCES OF ADEQUATE LEARNING EXPERIENCES AND INSTRUCTION IN READING, MATH AND OTHER AREAS OF ACADEMIC CONCERN:

8. Core instructional programs

Name of core reading program:
Evidence of effectiveness;
Schedule for teaching core reading program:
Fidelity assurances:
Qualifications of teacher:

Name of core math program:
Evidence of effectiveness;
Schedule for teaching core math program:
Fidelity assurances:
Qualifications of teacher:
Other Core Instruction Programs:

Subject:
Name of core programs:
Evidence of effectiveness;
Schedule for teaching core written expression programs:
Fidelity assurances:
Qualifications of teacher:

9. Tier 1 Interventions (Differentiated Instruction):

<table>
<thead>
<tr>
<th>Type of Intervention</th>
<th>Length of time in place</th>
<th>Effect of intervention on student’s performance in the classroom</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Tier 1 Assessments:

Include or attach any CBM reading, math or writing benchmark assessment results. Other assessment results to include are from district achievement tests, state achievement tests, and report card data.

STUDENT’S RESPONSE TO SCIENTIFIC, RESEARCH-BASED INTERVENTIONS

11. Tier 2 interventions (Show for each academic area of concern.)

Focus area:
Student’s grade during intervention:
Name of intervention(s):
Evidence of effectiveness:
Starting date and length of intervention:
Schedule for intervention:
Intervention group size:
Fidelity assurances:
Effect of intervention on student’s performance:

Focus area:
Student’s grade during intervention:
Name of intervention(s):
Evidence of effectiveness:
Starting date and length of intervention:
Schedule for intervention:
Intervention group size:
Fidelity assurances:
Effect of intervention on student’s performance:
12. Tier 2 Assessments:

Include or attach any progress monitoring data or intervention program test data.

13. Tier 3 Interventions (Show for each academic area of concern.)

Focus area:
Student’s grade during intervention:
Name of intervention(s):
Evidence of effectiveness:
Starting date and length of intervention:
Schedule for intervention:
Intervention group size:
Fidelity assurances:
Effect of intervention on student’s performance:

Focus area:
Student’s grade during intervention:
Name of intervention(s):
Evidence of effectiveness:
Starting date and length of intervention:
Schedule for intervention:
Intervention group size:
Fidelity assurances:
Effect of intervention on student’s performance:

14. Tier 3 Assessments:

Include or attach any progress monitoring data or intervention program test data.

15. Other Assessment Data (achievement tests, IQ tests, functional skills, etc.):

<table>
<thead>
<tr>
<th>Assessment Type</th>
<th>Examples:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criterion-referenced or diagnostic assessments</td>
<td>Brigance, DRA-2</td>
</tr>
<tr>
<td>IQ tests</td>
<td>WISC-4, WAIS-4, KABC-2, KAIT-2, CTONI-2, KBIT-2, WASI</td>
</tr>
</tbody>
</table>
IF DOING RTI:

16. Summary of Response to Intervention Data:

IF DOING S&W:

17. Charting Patterns of Strengths and Weaknesses

| Area(s) of Strength (at least 3 ‘S’ checks for each area): _____________________________________________ |
| Area(s) of Weakness (at least 4 ‘W’ checks for each area, including at least 1 individually administered academic achievement assessment): ____________________________________________________________________ |

### Summary of Strengths and Weaknesses Data:

### Exclusionary factors (address the following factors and state if any underachievement is primarily due or not primarily due to any of these):

- Visual, hearing or motor disability
- Mental retardation
- Emotional disturbance
- Cultural factors
- Environmental or economic disadvantage
- Limited English proficiency
- Poor attendance
20. Observation data and the relationship of observed behavior to the student’s academic functioning:

21. Summary (address the following items):

1. Is there underachievement, and if there is, were adequate learning experiences and instruction appropriate for age and grade level standards provided?
2. If using RtI, was there a slow rate of progress (or no progress) to the scientific, research-based intervention?
3. If using Patterns of S&W, was there a pattern of strengths and weaknesses in performance, achievement, or both relevant to determination of SLD?
4. If there is underachievement, does it have an adverse impact to the point that the student needs special education in order to benefit from education?
RE-EVALUATION REPORT

Report Date: ____________________
Prepared By: ____________________
School: __________________________
Grade: ____________________________
Eligibility: ________________________
Subsections: ______________________

Current Evaluation Data:

Reading Data Summary: (attach any data graphs, charts, reports)

Math Data Summary: (attach any data graphs, charts, reports)

Written Expression Data Summary: (attach any data graphs, charts, reports)

Behavior Data Summary: (attach any data graphs, charts, reports)

Medical Data Summary:

Parent/Student Notification and Input

Teacher Input:

Strengths:

Areas in Need of Improvement:

Strategies/Programs used:

Observation:

Exclusionary Factors:

☐ NA (if checked)

Other:
**Current Evaluation Data:**

**Reading Data Summary:** (attach any data graphs, charts, reports)  
Examples: Progress monitoring or benchmark data (DIBELS, AIMSweb), curriculum-based measurement data, criterion-referenced assessment data, achievement test results, and classroom data.

**Math Data Summary:** (attach any data graphs, charts, reports)  
Examples: Progress monitoring or benchmark data, curriculum-based measurement data, criterion-referenced assessment data, achievement test results, and classroom data.

**Written Expression Data Summary:** (attach any data graphs, charts, reports)  
Examples: Progress monitoring or benchmark data, curriculum-based measurement data, criterion-referenced assessment data, achievement test results, and classroom data.

**Behavior Data Summary:** (attach any data graphs, charts, reports)  
Examples: SWIS data, local data on office referrals, suspensions, behavior checklists, classroom observations, teacher-collected data (frequency counts, time sampling).

**Medical Data Summary:**  
Examples: Overall health, medication, hearing test results, vision test results

**Parent /Student Notification and Input**  
Document notification and summarize information gathered from parent and/or student interviews.

**Teacher Input:**

**Strengths:**  
Academic, work habits, social behavior.

**Areas in Need of Improvement:**  
Academic, work habits, social behavior.

**Strategies/Programs used:**  
List programs / strategies that had the most success.

**Observation:**  
Summarize observation data obtained during instruction in the area of disability.

**Exclusionary Factors:**

- NA (if checked)  
Address any visual, hearing or motor impairment, cognitive impairment, emotional impairment, autism spectrum disorder, or environmental (including attendance), cultural or economic disadvantage.

**Other:**
INSERT SLD Coversheet
Technical Assistance

PLAAFP
The evaluation provides the basis for further instruction by establishing the present level of academic achievement and functional performance (PLAAFP), which includes:

1. Data and other specific descriptive information on the student’s current academic performance, indicating both strengths and areas of need.
2. Data and other specific descriptive information on functional skills, including behavior, communication, motor, daily living or other skills related to school and age appropriate activities.
3. Defining specific needs that are a priority for the student’s learning or support in the general education program.
4. Describing the impact of the characteristics of the student’s disability on his/her performance and access to the general education curriculum and setting which will lead to decisions on supports, accommodations and modifications that are necessary for the student’s participation in general education instruction and activities.

OBSERVATION
An observation conducted during any early intervening period may be used and must be properly documented by the evaluation team. If, however, an observation has not been conducted prior to the referral and request for evaluation or additional observation data is needed, the evaluation team must conduct an observation and must properly document the observation.

An observation:
- must address academic performance and behavior;
- must be conducted in the child's learning environment as determined by the evaluation team;
- must be conducted in the general education setting unless the child is less than school age or out of school

The observation must be scheduled at a time when the child is engaged in the specific area of need identified in the evaluation plan. Existing observations must have been conducted while the child was engaged in the specific area of need identified in the evaluation plan.

The federal regulations and the MARSE do not prescribe the type of observation to be conducted; the following methods may be appropriate:
- behavioral observation procedures that result in quantifiable results (e.g., event recording, the sampling, interval recording);
- methods that relate student's classroom behavior to instructional conditions;
- informal or anecdotal recordings that address referral questions, instructional practice, and instructional fidelity.

These observations may also help to document that appropriated instruction was provided, and will assist in recommending instructional changes. Observations across instructional settings (e.g., different classes) are especially valuable, as are observations by different team members.
Local Guidance for Determining SLD Eligibility: Using ‘patterns of strengths and weaknesses’

1. The new regulations (300.309(a)(2)(ii) state: “The child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, State-approved grade-level standards, or intellectual development, that is determined by the group to be relevant to the identification of a specific learning disability, using appropriate assessments, consistent with 300.304 and 300.305.” (300.304 describes assessment requirements and 300.305 describes the evaluation planning process.)

2. Definitions:
   a. Performance – actual performance in the classroom, as assessed by the students in-class assessment results, grades, teacher anecdotes and observations.
   b. Achievement – results on curriculum-based measurement (e.g., DIBELS), criterion-referenced assessment (e.g., Brigance), norm-referenced (e.g., Woodcock-Johnson Achievement Tests), and state (MEAP) assessments.
   c. Intellectual Development – the student’s cognitive and functional skills, as assessed by IQ tests, functional skill surveys, interviews and observations.

3. When to use ‘patterns of strengths and weaknesses’ to determine eligibility:
   a. When a school does not have the capacity to implement Tier 3 interventions.
   b. In learning disability areas in which the school does not have a three-tier intervention process. For example, a school may use the three-tier intervention process for reading and math, but not for writing, oral expression or listening comprehension.
   c. In grades in which the school does not use a three-tier intervention process. For example, a school may use the three-tier process in grades K – 6, but not in grades 7 – 12.

4. Suggested requirements for using ‘patterns of strengths and weaknesses’ to determine SLD eligibility:
   a. The school uses a scientifically, research-based core programs that was implemented with fidelity with the referred student.
   b. The school tried differentiated instruction techniques with fidelity with the referred student for a period of 8 to 12 weeks.
   c. The school tried a scientifically, research-based Tier 2 intervention that was implemented with fidelity with the referred student for at least 12 weeks.
   d. During the Tier 2 intervention, the school used weekly progress monitoring to evaluate the effectiveness of the intervention and attempted to modify the intervention after each 3-4 weeks of poor progress.
   e. That when using the ‘Charting the Patterns of Strengths and Weaknesses’ page, a student shall have a least 4 weak boxes checked and at least one other academic area considered a strength (with at least 3 boxes checked as being a strength) and/or the intellectual/functional box checked as a strength to be considered eligible for special education services. The IEP team shall determine if the student’s weakness warrant special education services.

5. Other notes:
   a. When determining age-based achievement and performance, the evaluator should consider whether or not the student has received appropriate instruction for those age-based skills. For example, can a student retained in second grade be compared with third grade students if that student never received third grade instruction?
   b. If the student’s weak areas are primarily in performance rather than in achievement (i.e., the student has the academic skill but does not do the work in the classroom), then the school should consider different types of interventions other than academic (e.g., motivation).
   c. Probably the best way to actually ‘catch up’ the student’s academic skills with his peers is using a Tier 3 intervention (whether delivered in general education or special education) along with continued Tier 1 instruction.
   d. If a student is placed into special education and the intent of the school is to catch the student up academically, the student’s instructional time for that area should not be reduced from what it was when the student was only receiving general education services.