



Specific Learning Disabilities Evaluation Procedures

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Evaluation for Specific Learning Disabilities

Recent changes in federal special education rules and regulations indicate that states may consider the use of an RtI model for identifying students with specific learning disabilities as an alternative to the discrepancy model. Language from IDEA-2004, §300.307, states, in part:

- (a) A State must adopt ... criteria for determining whether a child has a specific learning disability . . . In addition, the criteria adopted by the State –*
- (1) Must not require the use of severe discrepancy between intellectual ability and achievement for determining whether a child has a specific learning disability . . .*
 - (2) Must permit the use of a process based on the child's response to scientific, research-based intervention; . . .*

Language from IDEA implementing regulation 34 CFR 300.309 *Determining the existence of a specific learning disability*, states, in part:

- (a) The group described in...300.306 may determine that a child has a specific learning disability...if*
- (1) The child does not achieve adequately for the child's age or to meet State-approved grade-level standards in one or more of the following areas, when provided with learning experiences and instruction appropriate for the child's age or State-approved grade-level standards...*
 - (2)(i) The child does not make sufficient progress to meet age or State-approved grade-level standards in one or more of the areas...when using a process based on the child's response to scientific, research-based intervention; or*
 - (2)(ii) 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 determined by the group to be relevant to the identification of a specific learning disability...*

In September, 2008, Michigan finalized rules to address the requirement that states adopt criteria for determining specific learning disability. Language mirrors federal language in §300.8(b)(10):

- R 340.1713 Specific learning disability defined; determination.*
- Rule 13. (1) "Specific learning disability" means a disorder in 1 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, write, spell, or to do mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia. Specific learning disability does not include learning problems that are primarily the result of visual, hearing, or motor disabilities, of cognitive impairment, of emotional impairment, of autism spectrum disorder, or of environmental, cultural, or economic disadvantage.*
- (2) In determining whether a student has a learning disability, the state shall:*
- (a) Not require the use of a severe discrepancy between intellectual ability and achievement.*
 - (b) Permit the use of a process based on the child's response to scientific, research-based intervention.*
 - (c) Permit the use of other alternative research-based procedures.*

R 340.1713 also adds the following language that mirrors federal language in §300.309:

- (3) A determination of learning disability shall be based upon a comprehensive evaluation by a multidisciplinary evaluation team, which shall include at least both of the following:*
- (a) The student's general education teacher or, if the student does not have a general education teacher, a general education teacher qualified to teach a student of his or her age or, for a child of less than school age, an individual qualified by the state educational agency to teach a child of his or her age.*
- (b) At least 1 person qualified to conduct individual diagnostic examinations of children, such as a school psychologist, an authorized provider of speech and language under R 340.1745(d), or a teacher consultant.*

In a letter of clarification to the field, dated January 22, 2009, Dr. Jacquelyn Thompson, Michigan Director of the Office of Special Education and Early Intervention Services, indicates three processes that may be used by the field in the evaluation of Specific Learning Disabilities including the following:

- 1) **Consideration of a severe discrepancy**, “*but only as one part of a full and individual evaluation. Severe discrepancy may never be used alone to determine a student eligible as a student with a SLD.*”
- 2) **Response to scientific, research based intervention**. Dr. Thompson notes that, “*depending on the local district’s practice, this process may have a variety of names; e.g., Instructional Consultation Team, Response to Intervention, Michigan’s Integrated Behavior and Learning Support Initiative. The Michigan Department of Education (MDE) does not mandate any specific scientific, research-based intervention process.*”
- 3) **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.”

GOISD Recommendation:

Given federal and stated guidelines to the field, Michigan districts have options for establishing eligibility for students suspected of having a specific learning disability. As part of a comprehensive evaluation it is recommended that the evaluation team:

- Use the data from a response to intervention (RtI) process in its consideration of eligibility for SLD; or when RtI is not implemented,
- Use assessment results to determine whether a child exhibits a pattern of strengths and weaknesses in performance, achievement, or both, relative to age, State-approved grade-level standards, or intellectual development. The use of a severe discrepancy between achievement and intellectual ability may be used as a portion of the data to establish a pattern of strengths and weaknesses.

Comprehensive Evaluation

Federal commentary makes it clear that RtI is only one component of the evaluation. “Determining why a child has not responded to research-based interventions requires a comprehensive evaluation,” and cites §300.304(b) which requires that a special education evaluation include a variety of assessments.

An RTI process does not replace the need for a comprehensive evaluation. A public agency must use a variety of data gathering tools and strategies even if an RTI process is used. The results of an RTI process may be one component of the information reviewed as part of the evaluation procedures required under §§ 300.304 and 300.305. As required in § 300.304(b), consistent with section 614(b)(2) of the Act, an evaluation must include a variety of assessment tools and strategies and cannot rely on any single procedure as the sole criterion for determining eligibility for special education and related services.

71 Fed Reg. 46,648

Comprehensive assessment requires:

- *“a variety of assessment tools and strategies to gather relevant functional, developmental and academic information about the child, including information provided by the parent,”*
§300.304(b)(1)
- *“assess[ment] in all areas related to suspected disability, including, if appropriate, health, vision, hearing, social/emotional status; general intelligence; academic performance; communicative status; motor abilities;”*
§300.304(c)(4)
- *“assessment sufficiently comprehensive to identify all of the child’s special education and related services needs, whether or not commonly linked to the disability category in which the child has been classified.”*
§300.304(c)(6)
- *“information from a variety of sources, including aptitude and achievement tests, parent input and teacher recommendations, as well as information about the child’s physical condition, social or cultural background, and adaptive behavior;”*
§300.306(c)(1)

The evaluation for SLD eligibility is completed for two purposes, to clarify eligibility and to define the starting point for further interventions. Words in the federal regulations include “relevant”, “if appropriate”, indicating the need for evaluation planning to determine the scope of an evaluation which must include “ruling in”:

- Inadequate achievement and progress in age and/or grade level content
- Adverse impact to the point that the child requires special education and/or related services.

and “ruling out”:

- Inadequate achievement due to other disabilities/factors
- Inadequate achievement due to lack of appropriate instruction

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.

Initiation of Evaluations and Timelines:

(c) The public agency must promptly request parental consent to evaluate the child to determine if the child needs special education and related services, and must adhere to the timeframes described in §§ 300.301 and 300.303, unless extended by mutual written agreement of the child's parents and a group of qualified professionals, as described in § 300.306(a)(1)—

(1) If, prior to a referral, a child has not made adequate progress after an appropriate period of time when provided instruction, as described in paragraphs (b)(1) and (b)(2) of this section; and

(2) Whenever a child is referred for an evaluation.

Michigan rules, which specify 30 school days from consent 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 response to intervention after the request for an evaluation.

Further, the district is required to address the question of disability if a student has not made progress after an appropriate period of time with appropriate intervention. The length of time may vary, depending on the circumstances, but the district should not delay unnecessarily once a disability is suspected.

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.

IDEA 2004 Regulation, §300.309- Determining Specific Learning Disability

§300.309 serves as the key regulation in the framework of determining SLD eligibility and defines elements of the evaluation process.

I. Establish lack of achievement relative to age or state approved grade level standards, when provided with appropriate learning experiences and instruction.

Evaluation of current data and further evaluation must establish and document:

- Inadequate achievement relative either to age level or grade level standards.
- Appropriate instruction

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.

§ 300.309 Determining the existence of a specific learning disability.
(a) The group described in § 300.306 may determine that a child has a specific learning disability, as defined in § 300.8(c)(10), if—
(1) The child does not achieve adequately for the child’s age or to meet State-approved grade-level standards in one or more of the following areas, when provided with learning experiences and instruction appropriate for the child’s age or State-approved grade-level standards:
(i) Oral expression.
(ii) Listening comprehension.
(iii) Written expression.
(iv) Basic reading skill.
(v) Reading fluency skills.
(vi) Reading comprehension.
(vii) Mathematics calculation.
(viii) Mathematics problem solving.

Reading fluency has been added to the list of potential LD concerns, further defining areas in the reading process. USDOE discussion accompanying issuance of the IDEA 2004 implementing regulations notes that fluency assessments are “very brief and highly relevant to instruction”. However, USDOE discussion also supports the relevance of standardized testing, stating that, “nothing in the Act or these regulations would preclude the eligibility group from considering results from standardized tests when making eligibility determinations.”

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

II. Demonstrate insufficient progress to meet age or grade level standards.

Documentation that the student is not making adequate progress, subsections 2(i) and (ii) may be completed in one of two ways: (1) determine that the student has not responded, despite the provision of high quality, individualized general education instructional interventions, or (2) by demonstrating a pattern of strengths and weaknesses, given appropriate instruction.

*(2)(i) The child does not make sufficient progress to meet age or State approved grade-level standards in one or more of the areas identified in paragraph (a)(1) of this section when using a process based on the child's response to scientific, research-based intervention; or
(ii) 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;*

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. Resources such as the Florida Center for Reading Research, at: www.fcrr.org, provide a listing of current research based interventions. Guidance on research based practices may also be found in Response to Intervention: Enhancing the Learning of All Children, published by the Michigan Assoc. of Administrators of Special Education.

Michigan's Integrated Behavior and Learning Support Initiative (MiBLSi) is an initiative through the Michigan Department of Education's Office of Special Education and Early Intervention Services and helps schools create a "culture" where staff teaches academic success and behavior success. Gogebic and Ontonagon county schools and districts are implementing RtI, with many districts utilizing MiBLSi training provided by GOISD, with the goal of increasing student reading performance and behavior performance. Staff is trained to:

1. Monitor student reading and behavior performance
 - Access dynamic data collection systems that provide staff with performance indicators in reading and behavior that are accurate and timely – for example, the School Wide Information System (SWIS™) and the Dynamic Indicators of Basic Early Literacy Skills (DIBELS™).
2. Make decisions based on data
 - Develop and implement reading and behavior interventions using student performance indicators
 - Evaluate intervention effectiveness through ongoing data collection and progress monitoring

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 is 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 review of research based interventions and student achievement on State approved content.

Districts must establish local standards for implementing either an RtI process or establishing a pattern of strengths and weaknesses (PSW). Gogebic-Ontonagon ISD has provided an RtI 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. Local guidelines for PSW are included in the following documents:

1. Local Guidance for Determining SLD Eligibility: Using 'patterns of strengths and weaknesses'
2. Charting Patterns of Strengths and Weaknesses

This guidance is based on the following assumptions:

- All children must be offered age appropriate instruction that is directly related to grade level content expectations.
- Even though the school may not have the capacity to fully implement a RtI process, interventions are most appropriately offered based on a three-tier model.
- Establishing a pattern of strengths and weaknesses involves classroom performance documentation along with curriculum-based, criterion-referenced and/or norm referenced academic/intellectual assessment.

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 in establishing achievement levels and documenting interventions:

Rule #1: If you have the ability to use the RtI option, this is the default approach

- District policies support the use of the RtI as an intervention approach; and,
- District implementation reflects the 8 core principles (see manual introduction).

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 Plan.

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.

The evaluation team must address and rule out other factors as the primary cause of the child's learning difficulties, including:

- Inadequate achievement due to other disabilities/factors
- Inadequate achievement due to lack of appropriate instruction

Presence of other disabilities/factors

(3) The group determines that its findings under paragraphs (a)(1) and (2) of this section are not primarily the result of—

- (i) A visual, hearing, or motor disability;*
- (ii) Cognitive Impairment;*
- (iii) Emotional impairment;*
- (iv) Cultural factors;*
- (v) Environmental or economic disadvantage; or*
- (vi) Limited English proficiency.*

Visual, hearing or motor disability- Ruling these areas out as the primary cause of underachievement may involve district screening results; teacher and parent input; or evaluation by a family physician, ophthalmologist, optometrist, audiologist, otolaryngologist, or neurologist, OT, PT or other evaluation staff.

Cognitive Impairment- The evaluation report must include data that would allow the IEP Team to determine whether cognitive impairment was the primary cause of the underachievement and either lack of progress or pattern of weakness. This could be done by affirmatively assessing for cognitive impairment or by record review information that would be contraindicative of such an impairment.

Emotional Impairment- The evaluation report must include data that would allow the IEP Team to determine whether an emotional impairment is the primary cause of the student's learning problems. Again, this could be done by affirmatively assessing for emotional impairment or by record review information that would be contraindicative of such an impairment or such a primary role.

Cultural, environmental or economic disadvantage- The evaluation must establish the primary cause of the disability and must rule out causative factors not related to disability, such as:

- Poor school attendance or frequent school changes causing lack of appropriate instruction due to inconsistent instruction or gaps in learning.
- Family stressors, including pressures from family situations or poverty should be eliminated as factors causing interruption or interference in learning.
- Cultural or ethnic background different from the norm or majority group should be considered both as a factor which may cause interference in approaching learning or as a factor in the perceptions of those who work with the child.

Limited English proficiency- English language learners who do not achieve commensurate with other children their age, despite research based interventions may be referred for special education evaluation and services. However, assessment must consider the child's cultural and language differences:

- Selection must be non-discriminatory with respect to race and culture
- Administration must be in the child's native language or in a form that will best estimate the child's abilities.

Lack of Appropriate Instruction:

Federal guidance indicates that “children should not be identified as having a disability before concluding that their performance deficits are not the result of a lack of appropriate instruction.” Although the child is not required to have any *specific* research based instruction prior to identification, the evaluation team must be able to conclude that lack of appropriate instruction is not the determinant factor in the child’s underachievement. The student may be provided with interventions either prior to the evaluation or as a part of the evaluation process.

(b) To ensure that under achievement in a child suspected of having a specific learning disability is not due to lack of appropriate instruction in reading or math, the group must consider, as part of the evaluation described in §§ 300.304 through 300.306—

(1) Data that demonstrate that prior to, or as a part of, the referral process, the child was provided appropriate instruction in regular education settings, delivered by qualified personnel; and
(2) Data-based documentation of repeated assessments of achievement at reasonable intervals, reflecting formal assessment of student progress during instruction, which was provided to the child’s parents.

SLD eligibility requirements specify the need for documentation of appropriate instruction in the regular education setting by qualified personnel. The regulation notes that data may describe instruction prior to, or as part of the referral process.

Examples of appropriate instruction documents:

- Chronology of student’s educational history-
 - Teacher anecdotal records
 - Grade retentions
 - Attendance
 - Grades
- General Education Curriculum
 - 5 essential components of reading- phonemic awareness, phonics knowledge, fluency, vocabulary and comprehension
 - Math- conceptual understanding, computational and procedural fluency, fact fluency and problem solving skills.
 - District’s curriculum is aligned with state standards
- Fidelity of instruction
 - 80% of students within the classroom are meeting state/district standards
 - Differentiated instruction, universal design principles
 - Multi-tiered intervention practices
 - Individual instructional practices
 - Staff training in effective instructional programs / strategies.
 - Observation of classroom instruction or the use of checklists by teachers, peers or content specialists

Intervention during evaluation demonstrates:

- Research-based intervention- nature, frequency and duration
- Highly qualified teachers

- Results of interventions

New to the SLD regulations is the requirement to provide *data based documentation of repeated assessments of achievement*, with the following characteristics:

- *Reasonable intervals*
- *Formal assessment of student progress during instruction*
- *Provided to parents*

NOT Just the MEAP: Language regarding reasonable intervals implies that yearly MEAP assessment would not meet this criterion. Rather, the district will want to demonstrate practices that might include universal screening, curriculum based measurement, and progress monitoring, the results of which are shared periodically with the parent.

It should also be noted that, although §300.309(b) refers specifically to reading and math, the regulations also require that the student be provided with *learning experiences and instruction appropriate for the child's age or State-approved grade level standards* in all areas being considered for SLD eligibility. Best practice would indicate that the documentation required in §300.309(b) would also apply to instruction in the other areas of eligibility.

IDEA 2004 Regulation, §300.310, Observation

When considering the presence of a Specific Learning Disability, the district must ensure that observations document the student's academic performance and behavior in the area(s) of difficulty.

§ 300.310 Observation.

(a) The public agency must ensure that the child is observed in the child's learning environment (including the regular classroom setting) to document the child's academic performance and behavior in the areas of difficulty.

(b) The group described in § 300.306(a)(1), in determining whether a child has a specific learning disability, must decide to—

(1) Use information from an observation in routine classroom instruction and monitoring of the child's performance that was done before the child was referred for an evaluation; or

(2) Have at least one member of the group described in § 300.306(a)(1) conduct an observation of the child's academic performance in the regular classroom after the child has been referred for an evaluation and parental consent, consistent with § 300.300(a), is obtained.

(c) In the case of a child of less than school age or out of school, a group member must observe the child in an environment appropriate for a child of that age.

During the evaluation planning process, the evaluation team and the parent must determine whether the documentation of observations will include information gained prior to the initiation of the formal evaluation or if observations will be conducted as part of the evaluation plan. Observations must occur in the regular classroom, specific to the academic performance area of concern. Exceptions to observations occurring in the regular classroom include:

- Students who are out of school due to disciplinary or health reasons
- Older students who had previous eligibility but have been out of school for an extended period of time.
- Younger students who are not yet attending K-12 programming.

Regulations specify that, given exceptional circumstances, the child must be observed in an age appropriate environment.

§ 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.

- § 300.311 Specific documentation for the eligibility determination.
- (a) For a child suspected of having a specific learning disability, the documentation of the determination of eligibility, as required in § 300.306(a)(2), must contain a statement of—
- (1) Whether the child has a specific learning disability;
 - (2) The basis for making the determination, including an assurance that the determination has been made in accordance with § 300.306(c)(1);
 - (3) The relevant behavior, if any, noted during the observation of the child and the relationship of that behavior to the child's academic functioning;
 - (4) The educationally relevant medical findings, if any;
 - (5) Whether—
 - (i) The child does not achieve adequately for the child's age or to meet State-approved grade-level standards consistent with § 300.309(a)(1); and
 - (ii)(A) The child does not make sufficient progress to meet age or State approved grade-level standards consistent with § 300.309(a)(2)(i); or
 - (B) 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 consistent with § 300.309(a)(2)(ii);
 - (6) The determination of the group concerning the effects of a visual, hearing, or motor disability; cognitive impairment; emotional impairment; cultural factors; environmental or economic disadvantage; or limited English proficiency on the child's achievement level; and
 - (7) If the child has participated in a process that assesses the child's response to scientific, research-based intervention—
 - (i) The instructional strategies used and the student-centered data collected; and
 - (ii) The documentation that the child's parents were notified about—
 - (A) 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;
 - (B) Strategies for increasing the child's rate of learning; and
 - (C) The parents' right to request an evaluation.
- (b) Each group member must certify in writing whether the report reflects the member's conclusion. If it does not reflect the member's conclusion, the group member must submit a separate statement presenting the member's conclusions.

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.

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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 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.

	Usually	Sometimes	Seldom/Never	N/A
On time for class				
Brings necessary materials				
Turns in completed assignments				
Turns in assignments on time				
Willing to make-up assignments				
Follows teacher's directions				
Attends to lecture/discussion				
Participates in class discussions				
Stays on-task during work time				
Appropriate peer interactions				
Appropriate teacher interactions				

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:			
<input type="checkbox"/> Oral Expression	<input type="checkbox"/> Basic Reading	<input type="checkbox"/> Reading Comprehension	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Reading Fluency	<input type="checkbox"/> Written Expression	<input type="checkbox"/> Math Problem Solving

Academic Skills

Language (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty re-telling what has just been said
<input type="checkbox"/> Difficulty modulating voice (e.g., too soft, too loud)	<input type="checkbox"/> Slow/halting speech, using fillers (e.g., uh, you know, um)
<input type="checkbox"/> Difficulty naming people or objects	<input type="checkbox"/> Difficulty with pronouncing words
<input type="checkbox"/> Difficulty staying on topic	<input type="checkbox"/> Difficulty rhyming
<input type="checkbox"/> Difficulty in explaining things (e.g. feelings, ideas) due to lack of vocabulary, articulation, and/or grammar skills	<input type="checkbox"/> Difficulty with phonemic awareness tasks (e.g., saying initial sounds, saying sounds of words, saying words fast)
<input type="checkbox"/> Difficulty understanding instructions or directions	<input type="checkbox"/> Limited interest in books or stories

Notes:

Reading (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty reading short, irregular sight words
<input type="checkbox"/> Difficulty identifying sounds	<input type="checkbox"/> Difficulty retelling what has been read
<input type="checkbox"/> Difficulty blending sounds into words	<input type="checkbox"/> Difficulty with retention of new vocabulary
<input type="checkbox"/> Difficulty reading short, regular words	<input type="checkbox"/> Difficulty demonstrating comprehension of sentences/stories

Notes:

Written Language (Written Expression) - - Student has	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty with drawing familiar shapes
<input type="checkbox"/> Difficulty with holding writing instruments	<input type="checkbox"/> Difficulty with naming, copying or writing letters
<input type="checkbox"/> Difficulty copying / tracing	<input type="checkbox"/> Frequent letter, number, and symbol reversals

Notes:

Preschool / Kindergarten - Pg. 2

Math (Math Calculation, Math Problem Solving) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty in recognizing numbers
<input type="checkbox"/> Difficulty counting aloud	<input type="checkbox"/> Difficulty in comparing relative size (e.g. numbers, objects)
<input type="checkbox"/> Difficulty in one-to one correspondence when counting objects	<input type="checkbox"/> Difficulty in matching number symbol to corresponding objects

Notes:

Functional Skills

Social Emotional (All Areas) - - Student has:	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty with self-control when frustrated.
<input type="checkbox"/> Difficulty 'joining in' and maintaining positive social status in a peer group.	<input type="checkbox"/> Difficulty using other students as models to cue self on appropriate behavior
<input type="checkbox"/> Difficulty with sharing (e.g., objects, teacher's time)	

Notes:

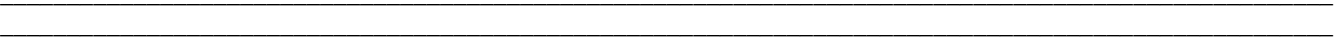
Attention (All Areas) - - Student has	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty sustaining attention in work or play activities

Notes:

Gross and Fine Motor Skills (All Areas) - - Student:	
<input type="checkbox"/> Has age appropriate skills	<input type="checkbox"/> Demonstrates poor ability to color or write 'within the lines'
<input type="checkbox"/> Appears awkward and clumsy, dropping, spilling, or knocking things over	<input type="checkbox"/> Grasps writing instruments awkwardly, resulting in poor handwriting, drawing
<input type="checkbox"/> Has trouble with buttons, zippers, hooks, snaps and tying shoes	<input type="checkbox"/> Has difficulty using small objects or items that demand precision (e.g., legos, puzzle pieces, scissors)
<input type="checkbox"/> Creates art work that is immature for age	<input type="checkbox"/>

Notes:

Summary:



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 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:			
<input type="checkbox"/> Oral Expression	<input type="checkbox"/> Basic Reading	<input type="checkbox"/> Reading Comprehension	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Reading Fluency	<input type="checkbox"/> Written Expression	<input type="checkbox"/> Math Problem Solving

Academic Skills

Language (Oral Expression, Listening Comprehension, Basic Reading - Phonemic Awareness) - - Student has:	
<input type="checkbox"/> Grade appropriate	<input type="checkbox"/> Difficulty re-telling what has just been said
<input type="checkbox"/> Difficulty modulating voice (e.g., too soft, too loud)	<input type="checkbox"/> Slow/halting speech, using fillers (e.g., uh, you know, um)
<input type="checkbox"/> Difficulty naming people or objects	<input type="checkbox"/> Difficulty with pronouncing words
<input type="checkbox"/> Difficulty staying on topic	<input type="checkbox"/> Difficulty rhyming
<input type="checkbox"/> Difficulty in explaining things (e.g. feelings, ideas) due to use of imprecise language and limited vocabulary	<input type="checkbox"/> Difficulty with phonemic awareness tasks (e.g., saying initial sounds, saying sounds of words, saying words fast)
<input type="checkbox"/> Difficulty understanding instructions or directions	<input type="checkbox"/> Poor grammar or misuses words in conversation
<input type="checkbox"/> Inserts malapropisms into conversation	<input type="checkbox"/> Difficulty with pragmatic skills (e.g., understands the relationship between speaker and listener, staying on topic, making inferences)

Notes:

Reading (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Slow oral reading skills that may interfere with comprehension
<input type="checkbox"/> Difficulty identifying sounds, blending sounds into words	<input type="checkbox"/> Difficulty retelling what has been read
<input type="checkbox"/> Difficulty reading regular words	<input type="checkbox"/> Difficulty with retention of new vocabulary
<input type="checkbox"/> Difficulty reading irregular sight words	<input type="checkbox"/> Difficulty demonstrating comprehension of sentences/stories
<input type="checkbox"/> Difficulty when reading sentences; may frequently lose place, omit words, insert words, substitute words, guess from initial sounds, reverse words, make self-corrections	<input type="checkbox"/>

Notes:

Grades 1 to 4 – Pg. 2

Written Language (Written Expression) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Frequent reversals of letters and numbers
<input type="checkbox"/> Difficulty with holding writing instruments	<input type="checkbox"/> Uneven spacing between letters and words, has trouble staying 'on the line'
<input type="checkbox"/> Messy and incomplete writing, with many cross-outs and erasures	<input type="checkbox"/> Inaccurate copying skills (e.g., confuses similar-looking letters and numbers)
<input type="checkbox"/> Difficulty remembering shapes of letters and numbers	<input type="checkbox"/> Poor and inconsistent spelling
<input type="checkbox"/> Difficulty proofreading and self-correcting work	<input type="checkbox"/> Complete written assignments

Notes:

Math (Math Calculation, Math Problem Solving) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty with comparisons
<input type="checkbox"/> Difficulty with simple counting and one-to-one correspondence between number and objects	<input type="checkbox"/> Difficulty telling time or conceptualizing the passage of time
<input type="checkbox"/> Difficulty counting by other numbers (2's, 5's, 10's)	<input type="checkbox"/> Difficulty solving one-step word problems
<input type="checkbox"/> Difficulty estimating quantity (e.g., quantity, value)	<input type="checkbox"/> Difficulty solving facts and longer operations

Notes:

Functional Skills

Social Emotional (All Areas) - - Student has:	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty with self-control when frustrated.
<input type="checkbox"/> Difficulty 'joining in' and maintaining positive social status in a peer group.	<input type="checkbox"/> Difficulty using other students as models to cue self on appropriate behavior
<input type="checkbox"/> Difficulty in 'picking up' on other people's moods/feelings	<input type="checkbox"/> Difficulty knowing how to share/express feelings
<input type="checkbox"/> Difficulty detecting or responding appropriately to teasing	<input type="checkbox"/> Difficulty dealing with group pressure, embarrassment and unexpected challenges
<input type="checkbox"/> Difficulty in understanding the social hierarchy (students, teachers, administrators) of school	<input type="checkbox"/> Difficulty in following directions – may be a can't do (lack of vocabulary) or a won't do problem

Notes:

Attention (All Areas) - - Student has:	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty sustaining attention in work or play activities
<input type="checkbox"/> Difficulty organizing tasks and activities	<input type="checkbox"/> Difficulty with losing things that are necessary for tasks
<input type="checkbox"/> Difficulty with remembering daily/routine activities	<input type="checkbox"/> Difficulty by being easily distracted

Notes:

Grades 1 to 4 – Pg. 3

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

Notes:

Other Notes or Observed Behavior - - Student:	
<input type="checkbox"/> Confuses left and right	<input type="checkbox"/> Is slow to learn new games and master puzzles
<input type="checkbox"/> Often loses things	<input type="checkbox"/> Has difficulty generalizing or applying skills from one situation to another
<input type="checkbox"/>	<input type="checkbox"/>

Notes:

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:			
<input type="checkbox"/> Oral Expression	<input type="checkbox"/> Basic Reading	<input type="checkbox"/> Reading Comprehension	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Reading Fluency	<input type="checkbox"/> Written Expression	<input type="checkbox"/> Math Problem Solving

Academic Skills

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

Notes:

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

Notes:

Grades 5 to 8 – Pg. 2

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

Notes:

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

Notes:

Functional Skills

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

Notes:

Grades 5 to 8 – Pg. 3

Attention (All Areas) - - Student has:	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty sustaining attention in work or play activities
<input type="checkbox"/> Difficulty organizing tasks and activities	<input type="checkbox"/> Difficulty with losing things that are necessary for tasks
<input type="checkbox"/> Difficulty with remembering daily/routine activities	<input type="checkbox"/> Difficulty by being easily distracted
<input type="checkbox"/> Fails to pay close attention to details or makes careless mistakes in schoolwork or other activities	

Notes:

Gross and Fine Motor Skills (All Areas) - - Student:	
<input type="checkbox"/> Has age appropriate skills	<input type="checkbox"/> Has limited success with games and activities that demand eye-to-hand coordination (e.g. musical instruments, sports)
<input type="checkbox"/> Appears awkward and clumsy, dropping, spilling, or knocking things over	<input type="checkbox"/> Grasps writing instruments awkwardly, resulting in poor handwriting, drawing

Notes:

Other Notes or Observed Behavior - - Student:	
<input type="checkbox"/> Confuses left and right	<input type="checkbox"/> Is slow to learn new games and master puzzles
<input type="checkbox"/> Often loses things	<input type="checkbox"/> Has difficulty generalizing or applying skills from one situation to another
<input type="checkbox"/> Finds it hard to judge speed and distance	<input type="checkbox"/> Has trouble reading charts and maps
<input type="checkbox"/> Is disorganized and poor at planning	<input type="checkbox"/> Has difficulty listening and taking notes at the same time

Notes:

Summary:

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:			
<input type="checkbox"/> Oral Expression	<input type="checkbox"/> Basic Reading	<input type="checkbox"/> Reading Comprehension	<input type="checkbox"/> Math Calculation
<input type="checkbox"/> Listening Comprehension	<input type="checkbox"/> Reading Fluency	<input type="checkbox"/> Written Expression	<input type="checkbox"/> Math Problem Solving

Academic Skills

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

Notes:

Reading (Basic Reading, Reading Comprehension, Reading Fluency) - - Student has:	
<input type="checkbox"/> Grade appropriate skills	<input type="checkbox"/> Difficulty retelling what has been read
<input type="checkbox"/> Difficulty reading content area sight words	<input type="checkbox"/> Difficulty with retention of new vocabulary
<input type="checkbox"/> Difficulty reading common words seen in school/community	<input type="checkbox"/> Difficulty demonstrating literal comprehension of sentences/stories
<input type="checkbox"/> Difficulty when reading sentences; may frequently lose place, omit words, insert words, substitute words, guess from initial sounds, reverse words, make self-corrections	<input type="checkbox"/> Difficulty demonstrating inferential comprehension of stories and connections between stories/ideas
<input type="checkbox"/> Slow oral reading skills that may interfere with comprehension	<input type="checkbox"/>

Notes:

Grades 9 to 12 – Pg. 2

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

Notes:

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

Notes:

Functional Skills

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

Notes:

Grades 9 to 12 – Pg. 3

Attention (All Areas) - - Student has:	
<input type="checkbox"/> Age appropriate skills	<input type="checkbox"/> Difficulty sustaining attention in work or play activities
<input type="checkbox"/> Difficulty organizing tasks and activities	<input type="checkbox"/> Difficulty with losing things that are necessary for tasks
<input type="checkbox"/> Difficulty with remembering daily/routine activities	<input type="checkbox"/> Difficulty by being easily distracted
<input type="checkbox"/> Fails to pay close attention to details or makes careless mistakes in schoolwork or other activities	

Notes:

Gross and Fine Motor Skills (All Areas) - - Student:	
<input type="checkbox"/> Has age appropriate skills	<input type="checkbox"/> Has limited success with games and activities that demand eye-to-hand coordination (e.g. musical instruments, sports)
<input type="checkbox"/> Appears awkward and clumsy, dropping, spilling, or knocking things over	<input type="checkbox"/> Grasps writing instruments awkwardly, resulting in poor handwriting, drawing

Notes:

Other Notes or Observed Behavior - - Student:	
<input type="checkbox"/> Confuses left and right	<input type="checkbox"/> Is slow to learn new games and master puzzles
<input type="checkbox"/> Often loses things	<input type="checkbox"/> Has difficulty generalizing or applying skills from one situation to another
<input type="checkbox"/> Finds it hard to judge speed and distance	<input type="checkbox"/> Has trouble reading charts and maps
<input type="checkbox"/> Is disorganized and poor at planning	<input type="checkbox"/> Has difficulty listening and taking notes at the same time

Notes:

Summary:

Examples of Published Assessments
(This is not a complete list)

Assessment Type	Examples:
Progress monitoring, Benchmark screening	DIBELS, AIMSweb, Yearly Progress Pro, EdCheckup
Criterion-referenced assessments	Brigance
Norm-referenced achievement tests	WRMT-2/NU, Key Math 3, KTEA-2, PIAT-2/NU, WIAT-2, WJ-3/NU, DAB-3, OWLS, GORT-4, TERA-3, TEMA-3, TOWL-4, TOLD:P-4, TOLD:I-4, TWS-4, CASL, CELF-4
IQ tests	WISC-4, WAIS-4, KABC-2, KAIT-2, CTONI-2, KBIT-2, WASI
Curriculum assessments aligned with CE's and classroom instruction	District assessments, Classroom assessments
Adaptive/functional behavior scales	Adaptive Behavior Evaluation Scale-2, Adaptive Behavior Inventory, AAMR Adaptive Behavior Scale-School, Vineland Adaptive Behavior Scales-2

Worksheet to Determine Appropriate Instruction

	Elements of Instruction	Evidence of Effectiveness	Other Evidence of Effectiveness
What	Documented curriculum	School district has a written curriculum that is aligned with State content expectations.	<p>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.</p> <p>At least 80% of students using an intervention within the school have showed improved progress.</p> <p>Observations of interventions during the evaluation period indicate that they are being implemented with fidelity.</p>
	Core/intervention curriculum materials	Materials systematically teach and review skills and have scientific-research evidence of effectiveness. (See Worksheet for Evaluating Explicit Instruction and Systematic Curriculum)	
	Reading	Instruction emphasizes the following big ideas: phonemic awareness, phonics, fluency, vocabulary and comprehension.	
	Math	Instruction emphasizes the following big ideas: conceptual understanding, computational and procedural fluency, fact fluency and problem solving skills.	
	Writing	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.	
	Oral Expression	Instruction emphasizes the use of syntax, semantics and morphology.	
	Listening Comprehension	Instruction emphasizes the understanding of syntax, semantics and morphology.	
Who	Teacher Qualifications	Teacher meets NCLB highly qualified standards and has been trained to use the curriculum materials.	
How	Instructional techniques/strategies	When teaching new skills, teacher uses explicit instructional techniques. (See Worksheet for Evaluating Explicit Instruction and Systematic Curriculum)	
	Differentiated/tiered instruction	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, a few students receive targeted intensive instruction.	
	Fidelity of instructional implementation	There is documentation that the core and intervention programs are implemented with fidelity. (See Program/Instruction Fidelity Checklist)	
	Assessments / Use of data	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.	

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.	Yes	No
1. Lack of instruction in essential components of reading and math		
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? Report Page _____		
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		
<i>Document all information gathered in assessment that would exclude cognitive impairment as the determinant factor for this student's academic deficits.</i>		
• Do you have evidence, through interviews, observations and/or testing that the student has a cognitive impairment? Report Page _____		
4. Emotional Impairment		
<i>Document all information gathered in assessment that would exclude emotional impairment as the determinant factor for this student's academic deficits.</i>		
• 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. Page _____		
5. Vision, Hearing, or Motor Impairments		
<i>Document all information gathered in assessment that would exclude vision, hearing, or motor impairments as the determinant factor for this student's academic deficits.</i>		
• 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		
<i>Document all information gathered in assessment that would exclude environmental, cultural, or economic disadvantage as the determinant factor for this student's academic deficits.</i>		
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? (As dictated by LEA policy)		
• 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.
9. Parent input.
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 Rtl 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):

Type of Intervention	Length of time in place	Effect of intervention on student's performance in the classroom	Grade

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.):

Assessment Type	Examples:
Criterion-referenced or diagnostic assessments	Brigance, DRA-2
Norm-referenced achievement tests	WRMT-2/NU, Key Math 3, KTEA-2, PIAT-2/NU, WIAT-2, WJ-3/NU, DAB-3, OWLS, GORT-4, TERA-3, TEMA-3, TOWL-4, TOLD:P-4, TOLD:I-4, TSW-4, CASL, CELF-4
IQ tests	WISC-4, WAIS-4, KABC-2, KAIT-2, CTONI-2, KBIT-2, WASI
Adaptive/functional behavior scales	Adaptive Behavior Evaluation Scale-2, Adaptive Behavior Inventory, AAMR Adaptive Behavior Scale-School, Vineland Adaptive Behavior Scales-2

IF DOING RTI:

16. Summary of Response to Intervention Data:

IF DOING S&W:

17. Charting Patterns of Strengths and Weaknesses

	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	Observation, interviews, IQ assessment
Basic Reading	S N W	S N W	S N W	S N W	S N W	S N W	S N W	S N W
Reading Fluency	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Reading Comp.	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Math Calc.	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Math Prob. Solving	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Written Express.	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Oral Express.	S N W	S N W	S N W	S N W	S N W	S N W	S N W	
Listening Comp.	S N W	S N W	S N W	S N W	S N W	S N W	S N W	

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): _____

18. Summary of Strengths and Weaknesses Data:

19. 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 Rtl, 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: _____

Student: _____
School: _____

Prepared By: _____
Birthdate: _____

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:

RE-EVALUATION REPORT WITH EXAMPLES

Report Date: _____

Student: _____

Prepared By: _____

School: _____ Birthdate: _____

Grade: _____ Eligibility: _____ Subsections: _____

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, 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, 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, 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:

<input type="checkbox"/> 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.
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Other: