**Review of Existing Evaluation Data**

**Evaluation History**  
☐ This is an **initial evaluation** for [Insert Name]. There are no prior Full and Individual Evaluations (FIEs) on record for [Insert Name].

☐ A prior **Full and Individual Evaluation (FIE)** was completed on **[Insert Date]**, which included assessments in the following areas:

* **Speech/Language**: [Insert summary or key result, if applicable]
* **Emotional/Behavioral**: [Insert summary or key result, if applicable]
* **Adaptive Behavior**: [Insert summary or key result, if applicable]
* **Medical/Health**: [Insert summary or key result, if applicable]
* **Developmental History**: [Insert summary or key result, if applicable]

☐ An **independent evaluation** was completed by **[Insert Evaluator/Agency]** on **[Insert Date]**. Key findings included the following:

* [Insert key takeaways, such as eligibility or recommendations]

☐ A **504 evaluation** was completed on **[Insert Date]**, resulting in eligibility for Section 504 services. The following accommodations were documented:

* **Accommodations**: [List accommodations, such as extended time, small group testing, etc.]
* **Subjects Supported**: [List subjects for which 504 accommodations apply, such as reading, math, or behavior]

**Summary of Previous Supports**  
[Insert Name] has received the following supports through Section 504:

* **Accommodations**: [List supports, such as extra time, small group, behavior support, etc.]
* **Interventions**: [Include any relevant behavioral or academic interventions that were provided]

**AI Prompt for Legally Defensible Narrative**

Here’s a clear, direct, and concise **AI prompt** to generate this content as a formal, legally defensible narrative for the FIE.

**Prompt:**  
"Generate a legally defensible narrative for the 'Review of Existing Evaluation Data' section of a Full and Individual Evaluation (FIE). The narrative should identify the evaluation history, including prior FIEs, independent evaluations, and Section 504 evaluations. Summarize key findings from these evaluations and list accommodations, supports, and any prior eligibility decisions. Ensure the student's name is used instead of 'the student,' and the final output should be concise, clear, and aligned with IDEA guidelines."

**Example of AI-Generated Narrative (Concise Version)**

Here’s an example of a **concise legally defensible narrative** for this section.

**Review of Existing Evaluation Data**

This is an **initial evaluation** for [Insert Name]. No prior Full and Individual Evaluations (FIEs) for [Insert Name] are on file.

A **504 evaluation** was conducted on **[Insert Date]**, and [Insert Name] was found eligible for Section 504 services. The 504 plan includes the following accommodations:

* **Accommodations**: [List accommodations, such as extended time, preferential seating, etc.]
* **Subjects Supported**: [List subjects, such as reading, math, etc.]

If applicable:  
A prior **Full and Individual Evaluation (FIE)** was completed on **[Insert Date]**, which included assessments in the following areas:

* **Speech/Language**: [Insert summary or key result, if applicable]
* **Emotional/Behavioral**: [Insert summary or key result, if applicable]
* **Adaptive Behavior**: [Insert summary or key result, if applicable]
* **Medical/Health**: [Insert summary or key result, if applicable]
* **Developmental History**: [Insert summary or key result, if applicable]

Additionally, an **independent evaluation** was completed by **[Insert Evaluator/Agency]** on **[Insert Date]**, which found that [Insert summary of key findings, such as eligibility or specific recommendations].

The information from prior evaluations, Section 504 plans, and independent evaluations was considered as part of this evaluation process to ensure alignment with IDEA guidelines for eligibility determination and the development of an appropriate educational plan.

**Summary for Building Blocks Window**

Here’s a **concise, one-sentence summary** for the **Building Blocks Window**:

**Summary**: Summarizes previous evaluation history, 504 services, and supports provided, including FIEs, 504 evaluations, and independent evaluations.

**Summary of Key Changes**

| **Section** | **Original** | **Updated for Legal Defensibility** |
| --- | --- | --- |
| **Title** | Review of Existing Evaluation Data | Title remains unchanged (it's legally accurate) |
| **Initial Evaluation** | “This is an initial evaluation.” | Added legally clear statement that no FIEs exist. |
| **Prior Evaluations** | "A Full and Individual Evaluation..." | Clear, concise breakdown of FIEs and key data points. |
| **504 Plan** | "504 evaluation dated..." | Clear mention of eligibility, supports, and accommodations. |
| **Supports** | "Firstname received supports..." | Directly lists supports and accommodations from 504 plan. |
| **Independent Eval** | "Evaluation completed by..." | Identified as an **independent evaluation** with specific findings. |
| **Legally Defensible Language** | Not always specific | Tied everything to "compliance with IDEA guidelines" and included **objective, observable language**. |

**How We Kept It Short but Defensible**

1. **Eliminated Repetition** — We don’t need to restate eligibility decisions or re-explain 504 plans; we can just **list them clearly**.
2. **Clear Structure** — The information is now organized into **three clear categories**: FIEs, 504 Plans, and Independent Evaluations. This makes it easier for ARD/IEP teams to find what they need.
3. **Bullet-Style Supports** — Instead of long paragraphs, we list **Accommodations and Supports** clearly so that it’s faster to read and harder to misinterpret.
4. **Direct Legal Language** — Instead of "this evaluation was done to determine...," we use "This evaluation complies with IDEA guidelines." That is legally defensible language.

**Key Takeaways for Writing Concise, Legally Defensible Content**

1. **Organize Into Key Categories** — Use subheadings like **Evaluation History**, **504 Plan**, and **Summary of Supports** to organize content logically.
2. **Use Simple Statements** — Instead of "The previous evaluation found that the student met the criteria for...," just say **"The student met eligibility for..."**
3. **Use Data-Driven Language** — Use phrases like **"based on teacher input"**, **"according to parent report"**, and **"as indicated by assessment data"** to tie the information to **objective, measurable sources**.
4. **Summarize, Don’t List Everything** — We don’t need to copy every detail from past FIEs. Just mention **key points** (e.g., "Speech/Language: Mild Articulation Delays").
5. **Personalize the Student's Name** — Instead of "The student," always use **[Insert Name]**.