What to do Next?

Certainly! Here's a **comprehensive Evaluation Completion Checklist** for school psychologists to help ensure nothing is missed throughout the Full and Individual Evaluation (FIE) process. You can customize this further based on your district’s procedures and digital systems (e.g., Frontline, SuccessEd, SEIS, etc.).

**✅ Full and Individual Evaluation (FIE) Completion Checklist**

**☐ Referral & Planning**

* Review referral packet and determine if all required documents are present
* Verify receipt of consent for evaluation (check date and method)
* Confirm evaluation due date (45 school-day timeline)
* Assign roles for multidisciplinary team (Speech, OT, etc.)
* Send input/rating scale requests to teachers and parents
* Collect any previous evaluations or outside reports

**☐ Background Information**

* Conduct and document Social Developmental History (SDH) interview
* Review attendance, discipline records, and current grades
* Review health/medical records (vision/hearing screenings)
* Review prior interventions (RtI/MTSS) and documentation
* Review student work samples or classroom data
* Document all relevant accommodations and modifications

**☐ Observations & Interviews**

* Conduct classroom observation(s)
* Interview teacher(s)
* Interview parent/guardian
* (If applicable) Interview student

**☐ Assessment Administration**

* Cognitive assessment completed (e.g., WISC-V, DAS-II)
* Academic assessment completed (e.g., WJ-IV, WIAT-4)
* Behavior rating scales scored (e.g., BASC-3, Conners, Vineland)
* Executive functioning/attention scales completed (e.g., BRIEF)
* Language and communication (if needed)
* Adaptive behavior measures completed
* Autism-specific tools used (if needed: GARS-3, CARS-2, etc.)

**☐ Report Writing**

* Summarize all assessment results with interpretation
* Address all evaluation domains required for suspected disability
* Include data triangulation (parent, teacher, observation, testing)
* Include educational impact statement
* Include eligibility determination and recommendations
* Check report for legal defensibility and clarity
* Finalize and upload report to system

**☐ Team Review & ARD/IEP Prep**

* Send draft to supervisor (if required) for review
* Review report with team/service providers if needed
* Confirm eligibility determination
* Prepare talking points and summary for ARD meeting
* Submit report to case manager/ARD facilitator before deadline

**☐ Post-Evaluation Follow-Up**

* Upload evaluation checklist/documents to cumulative folder (if required)
* Return test materials to secure storage
* Document Medicaid billing (if applicable)
* Complete service logs or student data entry
* Archive all forms and data in compliance with district protocol

Would you like this formatted as a printable checklist, an editable Word/Excel doc, or organized into a project management tool like Trello or OneNote?

Where to Find It?

Here is a comprehensive **Evaluation Planning Chart** for new school psychologists, modeled after Region 20’s approach. This chart outlines **each major area that should be addressed in a Full and Individual Evaluation (FIE)**, provides a brief description, and lists **sources of information** for each section.

**🧠 Full and Individual Evaluation (FIE) Planning Chart for School Psychologists**

| **Evaluation Domain** | **Description** | **Common Information Sources** |
| --- | --- | --- |
| 1. **Sociological (SDH)**   Email link: [Email - Request for Input – Behavior Rating Form.docx](https://fortbend-my.sharepoint.com/:w:/r/personal/carol_clayborne_fortbendisd_gov/Documents/2025-2026%20LSSP/EVALUATIONS/Email%20-%20Request%20for%20Input%20%E2%80%93%20Behavior%20Rating%20Form.docx?d=w74191f19b2d543d0943b420926db9a7b&csf=1&web=1&e=awWvmY) | Includes family background, home environment, developmental and medical history | - Social Developmental History (SDH) interview- Parent/caregiver input- Medical/health records |
| 1. **Academic Achievement**   Email link: [Email - Request for Input – Behavior Rating Form.docx](https://fortbend-my.sharepoint.com/:w:/r/personal/carol_clayborne_fortbendisd_gov/Documents/2025-2026%20LSSP/EVALUATIONS/Email%20-%20Request%20for%20Input%20%E2%80%93%20Behavior%20Rating%20Form.docx?d=w74191f19b2d543d0943b420926db9a7b&csf=1&web=1&e=awWvmY) | Assesses current levels of academic functioning | - Standardized testing (e.g., WJ-IV ACH, WIAT)- Grades/report cards- Teacher input- STAAR scores |
| **3. Intellectual (Cognitive)** | Measures cognitive abilities and learning potential | - Cognitive assessments (e.g., WISC-V, DAS-II)- Observations during testing |
| **4. Communication** | Examines expressive, receptive, and pragmatic language skills | - Speech/language evaluations- Teacher observations- Parent interviews- Language samples |
| **5. Health & Vision/Hearing** | Ensures health status is not impacting learning | - Nurse's screening results- Vision/hearing screening forms- Medical records |
| **6. Emotional/Behavioral**  Email link: [Email - Request for Input – Behavior Rating Form.docx](https://fortbend-my.sharepoint.com/:w:/r/personal/carol_clayborne_fortbendisd_gov/Documents/2025-2026%20LSSP/EVALUATIONS/Email%20-%20Request%20for%20Input%20%E2%80%93%20Behavior%20Rating%20Form.docx?d=w74191f19b2d543d0943b420926db9a7b&csf=1&web=1&e=awWvmY) | Looks at emotional well-being, behavior concerns, mental health | - Behavior rating scales (e.g., BASC-3, Connors)- Interviews- Observations- Counseling notes |
| **7. Social Functioning** | Assesses peer interactions, social awareness, and relationships | - Teacher/parent input- Social skills rating scales- Observations in natural settings |
| **8. Adaptive Behavior** | Daily living skills and independence across settings | - Vineland-3 or ABAS-3- Parent and teacher forms- SDH- Classroom observations |
| **9. Functional Performance** | Impact of disability on school functioning and access to curriculum | - Teacher reports- Accommodation logs- Classroom data- Section 504 info if applicable |
| **10. Assistive Technology Needs** | Determines whether technology is required for access | - AT evaluations- Review of current accommodations- Teacher interviews |
| **11. Autism-Specific Areas** | When relevant: social interaction, restricted behaviors, communication | - Autism rating scales (e.g., GARS-3, CARS-2, ADOS)- Observations- Parent interview- Speech eval |
| **12. Attention/Executive Functioning** | Assesses attention, working memory, organization | - Teacher/parent input- Rating scales (e.g., Conners, BRIEF)- Cognitive testing subtests |
| **13. Motor Skills (if suspected)** | Fine/gross motor concerns | - OT/PT evaluations- Teacher/parent input- Observations- Developmental history |
| **14. Educational Impact/Need for Services** | Synthesizes how deficits affect learning and access | - Eligibility criteria- Triangulated data from above- Team discussion |

Would you like this converted into a printable chart or editable Excel/Word format to share with interns?

--

Where to Put It?

Based on your provided template, here's a detailed **ordered list of all sections and subsections** typically included in your **Full Individual Evaluation (FIE)** structure. This version closely mirrors the formatting, order, and language used in your editable Fort Bend ISD document.

**✅ FIE Structure: Master Section List**

1. **Reason for Referral**
2. **Texas Standard Measurement Procedures**
   * Note if deviations were made
3. **Review of Existing Evaluation Data (REED)**
4. **Texas Language Background / Communication Development**
   * Native/Academic Language
   * LEP status
   * Language of evaluation
   * Interpreter use
   * Summary of Language Performance
5. **TELPAS Summary** (if applicable)
6. **Speech-Language Evaluation** *(if applicable – dropped in by SLP)*
7. **Texas Health and Developmental History**
   * Vision
   * Hearing
   * Health Conditions
   * Birth/Developmental History
   * Physical Education
   * OT/PT Evaluation Summary *(if applicable)*
8. **Educational History**
9. **Texas Sociological Report**
   * Cultural/lifestyle influences
   * Family history
   * Attendance (if relevant)
10. **Emotional Functioning**
    * Parent Information
    * Teacher Information
    * Student Interview
    * Discipline History
    * PLAAFP / IEP Review (for reevaluation)
11. **Behavioral Observations**
    * Classroom/Systematic Observations
    * Observations during testing
    * Summary of behaviors and comparison data
12. **Formal Behavioral Assessments**
    * BASC-3
    * Conners-4 (or others used)
13. **Interpretation of Formal Assessments (Behavioral)**
14. **Related Services Consideration**
    * Counseling or other services
15. **Functional Behavioral Assessment (if applicable)**
    * Specific behaviors
    * Antecedents / Consequences
    * Hypothesized functions
    * Effective/ineffective strategies
    * BIP recommendations
16. **In-Home/Parent Training Summary** (if applicable)
17. **Texas Cognitive Functioning**
    * Testing Conditions
    * Formal Norm-Referenced Assessment
    * Cross-Battery Analysis (e.g., Gc, Gf, Gv, etc.)
    * Interpretation of Cognitive Results
    * Explanation of g-Value
18. **Texas Adaptive Behavior**
    * Formal/Informal measures
    * Summary and consistency with intellectual functioning
19. **Academic Functioning**
    * Informal Data
      + Current Grades
      + Parent Input
      + Teacher Input
      + Student Input
      + Supplemental Interventions
    * Classroom Observation
    * Criterion-Referenced / Curriculum-Based Assessments
      + STAAR/EOC
      + MAP / Renaissance 360
    * Norm-Referenced Data
      + WIAT-4 (or WJ, KTEA, etc.)
      + Subtest analysis and interpretation
20. **Vocational Section**
    * Interests
    * Goals
    * Parent/Teacher observations
21. **Texas Assistive Technology**
    * Consideration
    * Recommended devices/services
    * Summary of AT Performance
22. **Summary and Conclusions**
    * Integration of findings
    * Eligibility Determinations:
      + Specific Learning Disability (SLD)
      + Dyslexia
      + Emotional Disturbance (ED)
      + Other Health Impairment (OHI)
      + (Additional areas as needed)
23. **Recommendations**
    * TEA eligibility and Dyslexia status
    * Disability impact statement
    * IEP Recommendations:
      + Cognition
      + Academics
      + Social Skills
      + Behavior
24. **Signatures**
    * Evaluators and contributors
    * Final assurances

Would you like this exported into a **fillable checklist**, **Word doc**, or **Google Sheet**? I can also tailor it for **initial vs. re-evaluations** or **automated form building** (e.g., Microsoft/Google Forms).