

# Initial Eligibility Guide

## South Carolina EDPlan Demonstration Site

April 2023

This comprehensive guide is designed to provide you with a step-by-step walkthrough of the EDPlan's features, accompanied by screenshots for visual clarity. While EDPlan is intuitive to use, this guide is meant to serve as a helpful resource for those who want to explore the system fully. If you ever feel lost or confused while using the software, you can refer to the table of contents to navigate through the process.

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This guide will navigate the process from initial referral to initial eligibility for special education.

## LOCATE THE STUDENT

- (1) Click on “Find Students” in the top menu bar.
- (2) Click on “Student Search”.

(3) Enter the student's last name.

(4) Click the green "View Students" button at the bottom of the screen.

(5) Verify that it is the correct student and then click on the student's name (in blue).

This will bring the user to the Student Snapshot page. This page provides a snapshot of information related to the selected student.

## REFERRAL AND ELIGIBILITY

(1) From the Student Snapshot page click on "Start Referral and Eligibility".

STUDENT INFO ▾ RBHS ▾ STUDENT RISK ▾ ELIGIBILITY/REEVAL ▾ IEP ▾ ISP PROCESS 504 PROCESS DOCUMENTS HEALTH SERVICES ▾

SC Reference  
HOME / DASHBOARD / STUDENT INFO / STUDENT SNAPSHOT

One Other User on this Page

William P Saturday  
626744 | Dorchester Elementary School

Student Snapshot Events

ADD STUDENT TO CASELOAD

William P Saturday

DOB 04/14/2014

Native English

Dorchester Elementary School

Age 8y 10m

Instruction English

**GRADE 03**

Teacher

Education Program(s) Special Ed

To-do Items ( 0 )

Case Manager

Status Active

IEP

ELIGIBILITY

**Important Dates**

Last Evaluation

Last IEP

Next Evaluation Due

Next IEP Due

Actions Goals Contacts

START REFERRAL AND ELIGIBILITY 1

START AN IEP

START A FUNCTIONAL BEHAVIORAL ASSESSMENT

- (2) This will take the user to the Initial Eligibility process. Each tile represents a step in the process and gives an overview of the entire Initial Eligibility process. When a step is completed the gray bar at the bottom turns green. Click on the “Evaluation Planning” button to get started with the process.

STUDENT INFO ▾ ELIGIBILITY/REEVAL ▾ IEP ▾ ISP PROCESS DOCUMENTS

SC Reference  
FIND STUDENTS / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY

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Initial Eligibility

Evaluation Planning 2

Consent To Evaluate

Evaluation Summary Results

Eligibility Determination

Stop Process

## STEP 1 – EVALUATION PLANNING

### PREEVALUATION CONSIDERATIONS

- (1) The user can enter information in the Preevaluation Considerations section of the evaluation planning process.
- (2) When the user clicks the “Create Referral Event” button the process is saved and a Referral event is recorded in the students event history (which is accessible from the Student Snapshot page).

STUDENT INFO ▾ ELIGIBILITY/REEVAL ▾ IEP ▾ ISP PROCESS DOCUMENTS

SD Reference  
FIND STUDENTS / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY / EVALUATION PLANNING

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▾ Preevaluation Considerations

Evaluation Planning Date  
03/06/2023

Referring School  
Charleston Elementary School ▾

Referring Source  
Intervention Team ▾

Referral Date  
02/22/2023

2 CREATE REFERRAL EVENT SAVE

The user can continue to complete the following sections of the evaluation planning process. Note that the user is not required to click the “Save” button after each section. Items in red indicate required fields that the user must complete before finalizing the document.

## MEDICAL DOCUMENTATION

The user is able to select all items that apply. If the user selects “Other” they are able to enter additional information.

▾ Medical Documentation

What medical documentation was provided, if any?

☐ Audiological Report ☐ General Medical Forms ☐ Hospital Homebound Medical Forms

☒ Medical Diagnosis ☐ Neurological Report ☐ Occupational Therapy Report

☐ Physical Therapy Report ☐ Prescription ☐ Psychiatric Report

☐ Psychological Report ☐ Speech/Language Report ☒ None

☒ Other

Other:  
Documentation of referral from a mental health counselor

SAVE

## SECOND LANGUAGE INFORMATION

- (1) The user can select the corresponding option based on the student’s status. In this case, William is not an English Language Learner.

▾ Second Language Information

What is the student's ELL status?

Active ELL

Former ELL, 2 years monitoring

Former ELL, ESSA monitoring

Exited from ESOL program

Pending assessment

Not ELL

Child is Birth-3

SAVE

If the student is an English Language Learner, the user will be prompted to enter additional information about their language classification status.

Second Language Information

What is the student's ELL status?  
Active ELL

Initial Language Classification:  
(Required)

Current Language Classification:  
(Required)

ESOL Entry Date:  
mm/dd/yyyy  
(Required)

ESOL Plan Date:  
mm/dd/yyyy  
(Required)

SAVE

## DISCIPLINE INFORMATION

The user is required to select options from a dropdown list to answer 4 questions about the student's discipline information.

Discipline Information

The student's number of discipline referrals for the current school year is:  
Many discipline referrals (4 and more)

The student's number of days of in-school suspension (Include the previous school year if the form is generated within the first quarter):  
0-4 days

The student's number of days of out-of-school suspension (Include the previous school year if the form is generated within the first quarter):  
None

The student's number of days of Alternative to External Suspension with FAPE (Include the previous school year if the form is generated within the first quarter):  
None  
0-4 days  
5-10 days  
More than 10 days  
Information Not Available – Transfer  
N/A Student has not yet entered Kindergarten

## EDUCATIONAL INFORMATION

This section gives the user the ability to document information related to the students' developmental and educational history.

▼ Educational Information

The team reviewed and discussed the student's educational/developmental history:

☒ Yes ☐ No

Please explain  
 William has struggled with paying attention and reading throughout his academic career. William was born in a small town in the United States in 2014, and he has two younger siblings. His parents are both working professionals and have been supportive of his educational endeavors.

Please include relevant information about cognitive abilities, sensory, fine motor skills, etc.

Has the student been retained?

☐ Yes ☐ No  
 (Required)

Is attendance impacting the student educationally?

☐ Yes ☐ No  
 (Required)

General Education interventions have been completed in which performance areas?

☒ Behavior/Social/Emotional ☐ Math ☐ Motor ☒ Reading  
☐ Speech/Language/Communication ☐ Study Skills/Organization/Attention ☐ Writing  
☒ Other

If Other, please explain  
 William has received supplemental behavior interventions to include a self-monitoring intervention to help him focus on his assignments.

At any point in the process, the user is able to select the “Save” button to save all data that has been entered. The user will see a green “Saved!” notification after clicking on the save button.

STUDENT INFO ▼ ELIGIBILITY/REEVAL ▼ IEP ▼ ISP PROCESS DOCUMENTS

SC Reference  
 FIND STUDENTS / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY / EVALUATION PLANNING

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← ⓘ ✕ →

✓ Saved!

Please include relevant information about cognitive abilities, sensory, fine motor skills, etc.

## EVALUATION PLANNING

This is where the user can select the members of the evaluation planning team and record the proposal/recommendation from the evaluation planning team.

- (1) The user can select who participated in the evaluation planning based on who is associated with the student in their profile. Those selected will appear on the final document for signatures.
- (2) If the team does not suspect a disability or does not propose completing an evaluation at this time they can select “No” (if the user selects “Yes” is explained further below).
- (3) If the user selects no, additional options will be presented. If the user selects “Parent agreed to continue interventions and reconvene” a date box will appear.
- (4) The user can enter the date that the team will reconvene to consider an evaluation.

▼ Evaluation Planning

Evaluation Planning Team <sup>1</sup>

☒ Harper Cromwell, Psychologist ☐ Elijah Fellowes, Lead Speech Language Pathologist ☒ William P Saturday

☒ Jeffery Saturday, Father ☒ Stacy Saturday, Mother ☒ Katie Jones, General Education Teacher

☒ Sara-Beth Sanders, Agency Representative

Is the team proposing/recommending an evaluation at this time?

☐ Yes ☒ No <sup>2</sup>

If no, select why:

☐ Data reviewed indicates no area of suspected disability.

☒ Parent agreed to continue interventions and reconvene. <sup>3</sup>

Date to Reconvene: 05/19/2023 <sup>4</sup>

**SAVE**

- (5) If the team recommends an evaluation the user can select “Yes”
- (6) The user will then select the area of suspected disability.
- (7) Depending on the areas selected, informational reminders will be presented. For this example, when OHI was selected a reminder is provided that a Medical Evaluation form and an Authorization for Release of Information Form is required.
- (8) Information is included based on the Standards for Evaluation and Eligibility Document (SEED) to remind the team of who must be included on the evaluation team for each category of suspected disability.

Is the team proposing/recommending an evaluation at this time?

☒ Yes ☐ No <sup>5</sup>

The student is being referred for an evaluation due to the following area(s) of suspected disability:

☐ Autism Spectrum Disorder ☐ Deaf/Hard of Hearing ☐ Deaf-Blindness

☐ Developmental Delay ☐ Emotional Disability ☐ Intellectual Disability

☐ Multiple Disabilities ☐ Orthopedic Impairment ☒ Other Health Impairment

☒ Specific Learning Disability ☐ Speech-Language Impairment ☐ Traumatic Brain Injury <sup>6</sup>

☐ Visual Impairment

<sup>7</sup> If you have selected OHI, OI, TBI, or VI you must provide parent with the necessary Medical Evaluation for Physically Impaired Form and Authorization for Release of Information Form.

Please note the Evaluators needed by Disability:

ASD - School Psychologist, Speech-Language Therapist, Autism Specialist, Occupational Therapist

DB - Teacher of the Deaf/Hard of Hearing, Teacher of the Visually Impaired, School Psychologist, Speech-Language Therapist, Audiologist, Ophthalmologist/Optometrlist (Licensed)

MD - Depends on the individual disabilities considered

OHI - Special Education Teacher/Provider, School Psychologist, Licensed Physician

SLI - Special Education Teacher/Provider, School Psychologist, Licensed Physician Therapist

VI - Licensed Physician, Teacher of Visually Impaired

DHH - Teacher of the Deaf/Hard of Hearing, School Psychologist, Speech-Language Therapist, Audiologist

DD - School Psychologist, Speech-Language Therapist, Early Childhood/PK Teacher

ED - School Psychologist, Social Worker

ID - School Psychologist

OI - Special Education Teacher/Provider, School Psychologist, Licensed Physician

SLD - School Psychologist, General Education Teacher


TBI - School Psychologist, Licensed Physician, Special Education Teacher/Provider

<sup>8</sup>

Team members must include all evaluators required for each suspected disability.



- (9) The user selects which evaluators will be included on the evaluation team.



 Team members must include all evaluators required for each suspected disability.

The Evaluator(s) for this student is (are):


|   |  |
|---|--|
| <input type="checkbox"/> Audiologist                          | <input type="checkbox"/> Teacher of the Deaf/Hard of Hearing           |
| <input type="checkbox"/> Early Childhood/PK Teacher           | <input checked="" type="checkbox"/> Special Education Teacher/Provider |
| <input checked="" type="checkbox"/> General Education Teacher | <input type="checkbox"/> Occupational Therapist                        |
| <input type="checkbox"/> Physical Therapist                   | <input type="checkbox"/> Licensed Physician                            |
| <input type="checkbox"/> Psychiatrist                         | <input checked="" type="checkbox"/> School Psychologist                |
| <input type="checkbox"/> Speech-Language Therapist            | <input type="checkbox"/> Social Worker                                 |
| <input type="checkbox"/> Teacher of Visually Impaired         |  |



 

(10) Given that OHI was selected as a category of suspected disability, the user can click on “Create Medical Evaluation” to create a document that can be sent to the student’s medical provider to provide diagnosis information for the evaluation team.


(11) The user can also click “Create Authorization of Release” to generate a release of information form.



Medical Evaluation for Physically Impaired Form

 If you have selected OHI, OI, TBI, or VI you must provide parent with the necessary Medical Evaluation for Physically Impaired Form.

Authorization of Release of Information

 You have selected a suspected disability of OHI, OI, TBI, or VI. Please create an Authorization of Release of Information Form.


 

As the authorization and medical forms are created, they can be accessed in the Documents pane at the bottom of the process. The document pane is accessible at the bottom of the page for each process. As documents for the student are created, they will be added to this list. Documents can also be uploaded, and batch printed from this section.


Documents for: William P Saturday

[ATTACH DOCUMENTATION](#) [UPLOAD ATTACHMENT](#)

| DocID | Date Generated | Generated By    | Document  | Status | Delete | Include in Batch         | Attachment |
|-------|----------------|-----------------|---|--------|--------|--------------------------|------------|
| 392   | 03/10/2023     | Harper Cromwell | <a href="#">Authorization Of Release</a>                            | Final  |        | <input type="checkbox"/> |            |
| 391   | 03/10/2023     | Harper Cromwell | <a href="#">Medical Evaluation for Physically Impaired Document</a> | Final  |        | <input type="checkbox"/> |            |



- An 'E' in the 'Del' column indicates that the document is associated with an Event.
- An 'C' in the 'Del' column indicates that the document is associated with a Parent Contact. In either case, the document can't be deleted until the associated event or contact is deleted.
- An 'A' in the 'Del' column indicates that the document is associated with another Document and it will be deleted when the associated document is deleted.



## CREATE EVALUATION PLANNING DOCUMENT

- (1) If the student’s document language is set to another language (in this case Spanish), the user can select to include a Spanish version of the document.
- (2) The user can select “Create Final” to finalize the evaluation planning document.

▼ Create Evaluation Planning Document

☐ Click here to include a Spanish version of the document 1

CREATE DRAFT
CREATE FINAL 2
SAVE

A PDF document is generated with the information entered in the evaluation planning process.

The user can navigate to the next section of the process in one of three ways.

- (1) Click the green arrow to move directly to the next step in the process.
- (2) Click the blue pop out menu to view and select a step in the process.
- (3) Click the breadcrumbs across the top to return to the overview of the initial eligibility process.

edplan FIND STUDENTS ▼ WIZARDS MY ACCOUNT ▼ REPORTING ▼ W. SATURDAY

STUDENT INFO ▼ ELIGIBILITY/REEVAL ▼ IEP ▼ ISP PROCESS DOCUMENTS

SC Reference  
HOME / DASHBOARD / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY 3 / EVALUATION PLANNI...

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1
←
→

▼ Authorization of Release of Information 2 ←

i You have selected a suspected disability of OHI, OI, TBI, or VI. Please create an Authorization of Release of Information Form.

CREATE AUTHORIZATION OF RELEASE

In this scenario, the user used option 2 to select the blue pop out menu.

## STEP 2 - CONSENT TO EVALUATE

- (1) To continue with the process, the user will select "Consent To Evaluate".

William P Saturday  
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←
PDF
↗
→

CREATE AUTHORIZATION OF RELEASE

SAVE

Initial Eligibility Close

- ✓ Evaluation Planning
- ▶ Consent To Evaluate 1
- ▶ Evaluation Summary Results
- ▶ Eligibility Determination
- ▶ Stop Process

The consent to evaluate will be prepopulated with selections based on the suspected disabilities selected during the evaluation planning process. The user can select and deselect options. Each option selected will print with the description on the consent form.

STUDENT INFO ▾ ELIGIBILITY/REEVAL ▾ IEP ▾ ISP PROCESS DOCUMENTS

SC Reference  
FIND STUDENTS / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY / CONSENT TO EVALUATE

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◀ ▶ 🔍 🗨️

▼ The proposed full and individual evaluation will include assessment in the areas checked below:

| Area   | Description   |
|--|---|
| <input checked="" type="checkbox"/> Academic Achievement | Assessment of academic achievement which may include a review of educational data or a formal assessment to help determine the student's current levels of functioning and identify strengths and weaknesses. Areas may include basic reading skills, reading fluency and comprehension, math calculation and reasoning, written and oral expression, and/or listening comprehension. (Required for initial identification of ASD, DHH, DB, ED, ID, OI, OHI, SLD, TBI). Additional information may also be gathered through the use of checklists, observations, interviews, and/or other evaluation methods. |
| <input type="checkbox"/> Adaptive Behavior               | Adaptive behavior scales address the age-appropriate behaviors necessary to live independently and function safely and appropriately in daily life. Adaptive behaviors include grooming, dressing, safety, food handling, money management, cleaning, social skills, and personal responsibility expected of the student's age and social group. (Required for initial identification of ASD, ID). Additional information may also be gathered through the use of checklists, observations, interviews, and/or other evaluation methods.  |
| <input type="checkbox"/> Assistive Technology            | An assistive technology (AT) assessment includes a functional evaluation of the impact of the provision of appropriate assistive technology devices and services to the student in his or her customary environment.  |
| <input type="checkbox"/> Other                           | Parents, teachers, and/or clinicians respond to clearly stated descriptions of observable characteristics or behaviors of individuals with autism   |

Next the user is asked about options that were considered and rejected. This information will be included in the Prior Written Notice that will be created as a part of this process.

- (1) If the user selects "other"
- (2) They are required to describe the other options considered.
- (3) If the user selects "other" under Why Rejected,
- (4) They are required to write a rejection reason.
- (5) They are also required to describe other factors relevant to the decision.

▼ Before making this decision, the following options were considered or used and rejected:

Options Considered

☐ Behavior management interventions
 ☐ Change in instructional level
 ☐ Change in instructional interventions
 ☐ Change in schedule
 ☐ Community agency referral
 ☐ Individual counseling
 ☐ Group counseling
 ☒ Other

Options Considered Other (Required) 2

Why Rejected

☐ Insufficient to meet the educational needs of your child
 ☐ Not appropriate at this time
 ☒ Other

Why Rejected Other (Required) 4

If other factors were relevant to this decision, they are described below: 5

(Required)

SAVE

Next the user can enter contact information related to the consent for evaluation. This information will be printed on the consent for evaluation form.

- (6) Enter the date the consent for will be provided to the parent.
- (7) The contact person at the school responsible for obtaining the consent.
- (8) The phone number for the school contact.
- (9) The user can also select agency information to be included as a part of the Prior Written Notice.



Parent Consent

Parent Consent - Attempt 1

LOG ATTEMPT

SAVE

- (2) The user can document the date the consent and procedural safeguards were provided/sent to the parent.
- (3) Select the method of delivery.
- (4) Select whether the consent was received.
- (5) If the user selects "No" then click "Confirm No Receipt"

Log Attempt Number 1

When was the Consent and Procedural Safeguards sent?  
03/10/2023

What was the method of delivery for the Consent and Procedural Safeguards?  
Provided in person

Was signed Parent Consent to Evaluate Received by School?  
No

CLOSE SAVE CONFIRM NO RECEIPT

The attempt is recorded in the Parent Consent section and the user can continue to log attempts to obtain parental consent.

- (6) Once consent is received the user will select "Yes" for the question asking if consent was received.
- (7) The user will enter the date the consent form was received.
- (8) The user will document whether consent was granted. In this example the answer is "Yes".
- (9) The user will click on "Confirm Consent to Evaluate" to complete the process.

Log Attempt Number 2

When was the Consent and Procedural Safeguards sent?

03/10/2023

What was the method of delivery for the Consent and Procedural Safeguards?

Provided in person

Was signed Parent Consent to Evaluate Received by School?

Yes

Date Received:

03/10/2023

Was Consent to Evaluate granted by the Parent?

Yes

CLOSE

SAVE

CONFIRM CONSENT TO EVALUATE

## STEP 3 - EVALUATION SUMMARY RESULTS

Once the team has received consent from the parent, they can move to the next step in the process which includes documenting their assessments and creating a notification of meeting to review the results.

### ASSESSMENTS

Evaluators can enter the assessments they complete with students to EDPlan. These assessments can then be added to different documents that are generated, including the evaluation report and IEP if desired. To enter assessment information:

- (1) Click on "Add Assessment".

STUDENT INFO ▾ ELIGIBILITY/REEVAL ▾ IEP ▾ ISP PROCESS DOCUMENTS

SC Reference

HOME / DASHBOARD / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY / EVALUATION SUMMAR...

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Assessments

1

ADD ASSESSMENT

i

No Assessments have been added for this student.

This will bring up the Add New Assessment(s) page.

**Add New Assessment(s)** [X]

**Assessment Category** (Required) ▼ ☐ Custom Assessment

**Assessment** ▼ **Assessment Date** mm/dd/yyyy [Calendar Icon]

(Required) ▼

Assessment Narrative

**CLOSE** **ADD ANOTHER ASSESSMENT** **SAVE**

- (2) Click on Assessment Category to choose a category from the dropdown list. In this case, the user selected Intellectual/Cognitive.

**Add New Assessment(s)** [X]

**Assessment Category** (Required) ▼ ☐ Custom Assessment

Assessment Date mm/dd/yyyy [Calendar Icon]

Assessment Narrative

**CLOSE** **ADD ANOTHER ASSESSMENT** **SAVE**

2

- Academic Achievement
- Adaptive Behavior
- Assessment(s) of Language
- Assistive Technology
- Autism Spectrum Rating Scale
- Developmental/Early Childhood
- Functional Behavioral Assessment (FBA)
- Health/Medical
- Hearing
- Intellectual/Cognitive**
- Interview(s)
- Language
- Learning Media Assessment
- Observations
- Occupational Therapy
- Orientation and Mobility
- Other
- Physical Therapy
- Response to Intervention (RtI) Data

- (3) Click on Assessment to choose the name of the assessment based on the category that was chosen. In this case the user chose the CAS-2.
- (4) If the name is not included in the list, the user has the option to click on Custom Assessment and enter the name of the assessment.

**Add New Assessment(s)**

Assessment Category: Intellectual/Cognitive

☐ Custom Assessment 4

Assessment 3

Assessment Date: mm/dd/yyyy

- A Language Processing Skills Assessment (TAPS-4)
- Bateria IV Pruebas de Habilidades Cognitivas (Bateria IV COG)
- Battelle Developmental Inventory Scale 2nd Edition (BDI-2)
- Battelle Developmental Inventory, 3rd Edition (BDI-3)
- Beery-Buktenica Developmental Test of Visual-Motor Integration, 6th Edition (VMI)
- Behavior Rating Inventory of Executive Function Second Edition (BRIEF-2)
- Bender Gestalt, Second Edition
- Cattel Infant Intelligence Scale
- Children's Memory Scale (CMS)
- Cognitive Assessment System, 2nd Edition (CAS-2)**
- Comprehensive Executive Function Inventory (CEFI)
- Comprehensive Receptive and Expressive Vocabulary Test - 2nd Edition (CREVT - 2)
- Comprehensive Test of Non-Verbal Intelligence: Second Edition (CTONI-2)
- Comprehensive Test of Phonological Processing-Second Edition (CTOPP-2)
- Developmental Activities Screening Inventory - II (DASI - II)
- Developmental Assessment of Young Children, 2nd Edition (DAYC-2)
- Developmental Assessment of Young Children, Second Edition (DAYC-2)
- Developmental Profile 4 (DP-4)
- Developmental Profile-4 (DP-4)

Buttons: ADD ANOTHER ASSESSMENT, SAVE

- (5) Enter the date the assessment was completed.
- (6) Select the person who administered the assessment, from a list of users that are associated with the student. In this case Mrs. Cromwell, the School Psychologist, completed the assessment.

**Add New Assessment(s)**

Assessment Category: Intellectual/Cognitive

☐ Custom Assessment

Assessment: Cognitive Assessment System, 2nd Edition (CAS-2)

Assessment Date: 03/14/2023 5

Assessor 6

- Elijah Fellowes (Lead Speech Language Pathologist)
- Harper Cromwell (Psychologist)**
- Mary Adams (Pre-K Special Ed Teacher)
- Sara-Beth Sanders (Agency Representative)

Score Types: ☐ # Errors, ☐ stanine, ☐ Grade Equiv, ☐ quotient, ☐ Percentile, ☐ text desc.

- (7) Select the Score Types that should be included.
- (8) Enter the scores for the Score Types selected.
- (9) Enter a short narrative of the results of the assessment.
- (10) Click Add Another Assessment to continue to add results or,
- (11) Click Save to return to the Evaluation Summary Results process.



Harper Cromwell (Psychologist) ▼

Score Types

☒ Std Score 7
☐ Age Equiv
 ☐ Grade Equiv
 ☒ Percentile
 ☐ # Errors
 ☐ stanine
 ☐ quotient
 ☐ text desc.

Std Score: 100
 Percentile: 50 8

Assessment Narrative

The Cognitive Assessment System - second edition (CAS-2) is a standardized test used to measure cognitive abilities in individuals aged 5 to 18 years. The test assesses several cognitive domains, including Planning, Attention, Simultaneous Processing, Successive Processing, and Receptive Knowledge. 9

10 CLOSE
 11 ADD ANOTHER ASSESSMENT
 SAVE

A table showing all the assessments entered for the student (12) as well as a section to write a summary of the evaluation results is provided (13) in the Assessments section of this process.

Assessments ADD ASSESSMENT

| Assessment Date ▼ | Assessment Category ↑               | Assessment ↑   | Score(s) ↑      | Edit ↑ | Delete ↑ |
|-------------------|-------------------------------------|--|-----------------|--------|----------|
| 03/15/2023        | Academic Achievement                | Kaufman Test of Educational Achievement, 3rd Edition (KTEA-3) Comprehensive Form | Std Score : 80  |        |          |
| 03/15/2023        | Intellectual/Cognitive              | Cognitive Assessment System, 2nd Edition (CAS-2) <span>12</span>                 | Std Score : 100 |        |          |
| 03/15/2023        | Response to Intervention (Rti) Data | Response to Intervention (Rti) Data  |                 |        |          |
| 03/14/2023        | Observations                        | Observation(s)   |                 |        |          |

Evaluation Summary:

Describe:  
Based on multiple assessment tools and observations, William, a 3rd-grade student, is struggling with attention and reading difficulties. His scores on the Cognitive Assessment System - second edition (CAS-2) suggest average cognitive abilities, while his scores on the Kaufman Test of Educational Achievement, third edition (KTEA-3) indicate below-average academic achievement.

Observations of William in the classroom reveal that he struggles with paying attention and reading. Additionally, Response to Intervention (RTI) data using the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) assessment shows that he continues to read well below his peers after six weeks of intervention using the Helping Early Literacy with Practice Strategies (HELPS) program. 13

Note that the user must enter assessment information for each category of assessment that was selected during the evaluation planning process. If the user does not enter assessment information for each area of assessment from the consent form an error will appear when they attempt to create the Comprehensive Initial Evaluation Report.

STUDENT INFO ▼ ELIGIBILITY/REEVAL ▼ IEP ▼ ISP PROCESS DOCUMENTS

Documentation has received more...

You have not entered an Assessment for every Assessment Category selected on the Consent to Evaluate.

SAVE

## ADDITIONAL DOCUMENTATION

This section gives the user the ability to document information that may be received during the evaluation process.

- (1) If additional documentation was not provided for the student during the evaluation process, the user can simply select “No” and move to the next section.

Additional Documentation

Was additional documentation provided for the student?

☐ Yes
☒ No

SAVE

- (2) If additional documentation was provided during the evaluation process, the user can select “Yes”.
- (3) The user is asked if the additional documentation supports the areas of suspected disability, chosen during the evaluation planning process. In this case the user selected “No”.
- (4) Given that the new documentation in this scenario was not related to the areas of suspected disability, the user is asked if an additional disability is suspected, in this case the user selected “Yes”.
- (5) The user documents the decision of the team related to the additional documentation.

Additional Documentation

Was additional documentation provided for the student?

☒ Yes
☐ No

Does the additional documentation support the area(s) of suspected disability(ies)?

☐ Yes
☒ No

Does an additional area of suspected disability need to be evaluated based on the documentation provided?

☒ Yes
☐ No

☐ Documentation was received less than 30 days before the timeline expired, and team agreed to revisit the additional information presented after the completion of the current evaluation.

☒ Documentation was received more than 30 days before the timeline expired and team agreed to address additional information within the current evaluation timeline.

SAVE

## COMPREHENSIVE INITIAL EVALUATION REPORT

The user has the option to create a draft of the evaluation report or create a final version of the evaluation report. In this case Mrs. Cromwell has gathered all components of the evaluation and will create a final version of the evaluation report.

Comprehensive Initial Evaluation Report

*A Comprehensive Initial Evaluation Report must be finalized.*

CREATE DRAFT
CREATE FINAL

After clicking on “Create Final” a PDF version of the evaluation report appears in a new browser window. The report includes a summary table of each evaluation including the Category, Name, Scores, Dates, and Evaluator (1). It also includes the narrative entered on the assessments page (2).



South Carolina District  
**Comprehensive Initial Evaluation Report**

|                                 |                            |   |
|---------------------------------|----------------------------|---|
| <b>Last Name:</b> Saturday      | <b>First Name:</b> William | <b>Student ID #:</b> 626744                 |
| <b>Date Created:</b> 03/14/2023 | <b>Grade:</b> 03           | <b>School:</b> Dorchester Elementary School |

## ASSESSMENTS

| Category             | Name   | Scores        | Dates      | Evaluator                      | 1 |
|----------------------|--|---------------|------------|--------------------------------|---|
| Academic Achievement | Kaufman Test of Educational Achievement, 3rd Edition (KTEA-3) Comprehensive Form | Std Score: 80 | 03/15/2023 | Harper Cromwell (Psychologist) |   |

**Narrative:** The Kaufman Test of Educational Achievement, third edition (KTEA-3) is a standardized test used to assess academic achievement in individuals aged 4 to 25 years. The test assesses several academic domains, including reading, math, written language, and oral language.

2

William received a total score of 80 on the KTEA-3, this indicates that his academic achievement is below average compared to his peers. The total score represents his overall academic achievement across all tested domains, and a score of 80 falls below the average score for his age group.

It is important to note that the assessment summary should include detailed information about the student's performance on each individual domain, as well as his strengths and weaknesses. This information can be used to identify areas where the student may need additional support or intervention to improve his academic performance.

The report also includes the Evaluation Summary entered on the Add New Assessment(s) page (3), and a section for signatures of each evaluator that participated in the assessment (4).

### Evaluation Summary:

Based on multiple assessment tools and observations, William, a 3rd-grade student, is struggling with attention and reading difficulties. His scores on the Cognitive Assessment System - second edition (CAS-2) suggest average cognitive abilities, while his scores on the Kaufman Test of Educational Achievement, third edition (KTEA-3) indicate below-average academic achievement.

Observations of William in the classroom reveal that he struggles with paying attention and reading. Additionally, Response to Intervention (RTI) data using the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) assessment shows that he continues to read well below his peers after six weeks of intervention using the Helping Early Literacy with Practice Strategies (HELPS) program.

Based on this data, it is recommended that William be considered for eligibility under the category of Specific Learning Disability. William will also benefit from strategies to improve his focus and engagement, specialized instruction to improve his decoding and comprehension skills, and accommodations to support his learning. Ongoing monitoring and assessment will be important to track his progress and adjust interventions as needed.

3

## EVALUATORS

| Name            | Title        | Signature | Date |
|-----------------|--------------|-----------|------|
| Harper Cromwell | Psychologist | 4         |      |


## NOTIFICATION OF MEETING

The user is prompted to create a notification of meeting for the Eligibility Determination meeting. They can create this notification by clicking on the “Create Notification of Meeting” button.

More explanation on the steps to create a notification of meeting can be found in [\[\[Insert Location\]\]](#).

## EVALUATION DATES

This section records the date that the evaluation was completed for the purpose of Indicator 11 reporting. The user is shown the date parent consent was received (1), the evaluation due date (2). The user is able to enter the evaluation completion date (3) and the number of days the student was absent during the evaluation (4). Once all information has been entered, click on “Confirm Evaluation Completion Date” (5) to create an event in the system.

Click the  in the upper right part of the screen to move to the Eligibility Determination process.

## STEP 4 – ELIGIBILITY DETERMINATION

### DISABILITY CRITERIA WORKSHEETS

This section allows the team to document information related to the categories of disability suspected. The suspected disabilities selected in the evaluation planning process will automatically be selected. (Note that the demonstration site only has 5 of the 13 disability worksheets)

- (1) The user can click on the green “Create Specific Learning Disabilities Criteria Worksheet” to create the worksheet.



A PDF version of the document is created and is also available in the students documents section back on the Eligibility Determination process page.

### STUDENT'S STATUS (IF APPLICABLE)

Consulting Group, Inc.

Student's Status (if applicable)

1 ☒ Transfer student with existing Eligibility(ies)

IEP Meeting Date mm/dd/yyyy (Required) IEP Begin Date mm/dd/yyyy (Required) IEP End Date mm/dd/yyyy (Required) IEP Meeting Purpose (Required) ▼

2 ☐ Partial Staffing of Initial Eligibility

☐ Continuation of staffing to complete eligibility

SAVE

## INFORMATION REVIEWED

This section allows the user to document all of the information that was reviewed as a part of the eligibility process and make a determination as to whether or not the student is eligible for special education. The list of information reviewed will include any assessments that were added in the Evaluation Summary Results process.

- (1) Select items from the list that were reviewed as a part of the eligibility conversation. These items will also appear on the prior written notice.
- (2) Describe any other factors relevant to the eligibility decision.

Information Reviewed

1 ☒ Cognitive Assessment System, 2nd Edition (CAS-2) ☒ Kaufman Test of Educational Achievement, 3rd Edition (KTEA-3) Comprehensive Form ☒ Observation(s)

☐ Classroom Observations ☐ Data Analysis Worksheet (InD) ☒ Response to Intervention (Rti) Data

☐ Evaluation Results (OT/PT/SL/LI) ☐ FBA/PBIP ☐ Discipline Record

☐ Individualized Service Plan (ISP) ☐ Informal Assessment ☐ Individualized Education Program (IEP)

☐ Medical Reports ☐ Multidisciplinary Team Report (Pre-K) ☐ Interventions/Progress Monitoring Data

☒ Parent Information ☐ Private Report ☐ Multidisciplinary Team Report (SLD/LI)

☒ Report Cards ☐ Speech/Language Report ☐ Psychological Report

☐ Education Plan (EP)

2 If other factors were relevant to this decision, they are described below:  
When considering whether to classify William as a student with a specific learning disability, it is important to consider all relevant factors that may be affecting his academic performance. In this case, William's recent family separation is a significant factor that should be considered. Given William's struggles with attention and reading difficulties, it is possible that his recent family separation may be exacerbating these challenges. It is important for educators and other professionals to work closely with William and his family to provide support and resources to help him cope with this difficult time.

- (3) Use the dropdown to answer the question related to meeting the eligibility criteria, in this case, the answer is "Yes"
- (4) Use the dropdown to answer the question about the need for special education/related services. In this case the answer is "Yes".
- (5) Write a statement about how the disability adversely affects the educational performance of the student.
- (6) The team must also rule out lack of appropriate instruction in reading, math, and limited English proficiency. In this case, use the dropdown to answer "Yes" to all three questions.



3 Yes ▾ Based on review of the above information, does the student meet eligibility criteria for one or more disabilities?

4 Yes ▾ At this time, does the severity of the child's disability indicate the need for special education/related services?

5 Please state the adverse effect on educational performance:  
William's specific learning disability, which primarily affects his attention and reading skills, can have a significant adverse effect on his educational performance.  
Difficulty paying attention in class can lead to missed instruction and difficulty completing assignments. Inattentiveness can also make it challenging for William to retain and recall essential information, which can affect his ability to learn new concepts and skills.

**Additional Considerations**

The IEP Team has also concluded:

Yes ▾ The determination is not the result of lack of appropriate instruction in reading, including the essential components of reading instruction. The term 'essential components of reading instruction' means explicit and systematic instruction in: phonemic awareness, phonics, vocabulary development, reading fluency (including oral reading skills), and reading comprehension strategies.

Yes ▾ The determination is not the result of lack of appropriate instruction in math.

Yes ▾ The determination is not the result of Limited English proficiency of the student.

SAVE

## TEAM CONCLUSION

If the answer to any of the above question's is "no" the conclusion would indicate that the student is not eligible (1), the user would be prompted to select a reason (2), enter the date the decision was made (3) and indicate which categories of disability they did not meet eligibility criteria (4).

Team Conclusion - Not Eligible 1

The student IS NOT ELIGIBLE (upon initial evaluation) for specialized instruction/services.

2 ☐ because the student does not have a disability and does not require specialized instruction/services.  
☐ because the student has a disability but does not require specialized instruction/services.  
(Required)

Ineligibility Date  
mm/dd/yyyy 3

(Required)

The team considered approving eligibility for the selected disability, but rejected that option because the student did not meet eligibility criteria as defined by Special Programs and Procedures.

4 ☐ Autism Spectrum Disorder ☐ Deaf/Hard of Hearing ☐ Deaf-Blindness ☐ Developmental Delay  
☐ Emotional Disability ☐ Intellectual Disability ☐ Multiple Disabilities ☐ Orthopedic Impairment  
☐ Other Health Impairment ☐ Specific Learning Disability ☐ Speech-Language Impairment ☐ Traumatic Brain Injury  
☐ Visual Impairment

The team considered approving eligibility for the selected disability, but rejected that option because the student did not meet eligibility criteria as defined by Special Programs and Procedures.

SAVE

In this scenario, William is eligible for special education/related services as the user selected "Yes" in the previous steps. In this scenario the team conclusion indicates that the student is eligible (5).

- (6) Select the primary eligibility category and if necessary the secondary eligibility category. In this scenario, William is eligible as SLD primary and OHI secondary.
- (7) The date the evaluation was completed will automatically be filled based on the information entered in the Evaluation Summary Results process. If it does not show it is likely that the user did not click the "Confirm Evaluation Completion Date" in the evaluation dates section.
- (8) Enter the date the eligibility was determined.
- (9) The next reevaluation review date is automatically determined based on the evaluation completion date.



(10) Select any other disabilities that were considered, but rejected as a part of the evaluation. In this case, no other disabilities were considered.

Team Conclusion - Eligible **5**

The student IS ELIGIBLE for specialized instruction/services with the following disabilities.

The team considered denying eligibility for the selected disability, but rejected that option because the student meets eligibility criteria as defined by Special Programs and Procedures.

|   |   |       |
|---|---|-------|
| Primary<br>Specific Learning Disability | Secondary<br>Other Health Impairment <b>6</b> | Third |
| Fourth                                  | Fifth   | Sixth |
| Seventh                                 | Eighth  | Ninth |
| Tenth                                   |   |       |

7 Evaluation Completion Date: 03/16/2023      8 Eligibility Date: 03/16/2023      9 Next Reevaluation Review Date: 03/16/2026

The team considered approving eligibility for the selected disability, but rejected that option because the student did not meet eligibility criteria.

|  |   |   |   |
|--|---|---|---|
| <input type="checkbox"/> Autism Spectrum Disorder          | <input type="checkbox"/> Deaf/Hard of Hearing         | <input type="checkbox"/> Deaf-Blindness             | <input type="checkbox"/> Developmental Delay    |
| <input type="checkbox"/> Emotional Disability              | <input type="checkbox"/> Intellectual Disability      | <input type="checkbox"/> Multiple Disabilities      | <input type="checkbox"/> Orthopedic Impairment  |
| <input type="checkbox"/> Other Health Impairment <b>10</b> | <input type="checkbox"/> Specific Learning Disability | <input type="checkbox"/> Speech-Language Impairment | <input type="checkbox"/> Traumatic Brain Injury |
| <input type="checkbox"/> Visual Impairment                 |   |   |   |

**SAVE**

## ELIGIBILITY TEAM MEMBERS

The user can select the members of the team that participated on the eligibility team. In this case, the student, William, participated (1). Use the dropdown to select all members of the team that participated (2).

Eligibility Team Members

Please select the relevant Team Members involved in the Eligibility Determination decision. For Transfer Students ONLY, please select the Team Members that reviewed the Eligibility Documents from the previous district or state.

Student: William P Saturday **1**

Parent-Guardian: Stacy Saturday      Parent-Guardian: Jeffery Saturday

LEA: Elijah Fellowes      General Education Teacher: Katie Jones

Special Education Teacher: Mary Adams      Evaluation Specialist: Harper Cromwell

☐ Mary Adams **2**  
☐ Harper Cromwell  
☐ Elijah Fellowes  
☐ Stacy Saturday      ☐ Katie Jones      ☐ Harper Cromwell  
☐ Elijah Fellowes      ☐ Jeffery Saturday  
☐ Sara-Beth Sanders

**SAVE**



▼ Create Prior Written Notice

Date Sent: mm/dd/yyyy 2

« March 2023 »

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 26 | 27 | 28 | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | 1  |
| 2  | 3  | 4  | 5  | 6  | 7  | 8  |

education program, we are proposing the following action(s)

**SAVE**

(3) Enter the proposed actions.

(4) Select the assessments used and enter any “other” items as necessary.

▼ Proposal of Action(s)

After a careful review of your child's education program, we are proposing the following action(s):

As a part of the evaluation process, we have assessed your child, William, using a variety of assessments, observations, and other information to determine eligibility for special education services. Based on the evaluation results, we are proposing eligibility under the categories of Specific Learning Disability (SLD) and Other Health Impairment (OHI).

3

The action(s) described above are proposed because

William has demonstrated significant academic difficulties in the areas of reading and attention, as evidenced by his scores on the Cognitive Assessment System - second edition (CAS-2), the Kaufman Test of Educational Achievement, third edition (KTEA-3), classroom observation, and Response to Intervention (RTI) data using the Dynamic Indicators of Basic Early Literacy Skills (DIBELS) assessment. These difficulties appear to be impacting his ability to access the general education curriculum and make adequate academic progress.

After a careful review of your child's education program we are refusing to take the following action(s):

Determine that William is not eligible for special education services.

The action(s) described above are refused because

We have carefully considered your child, William's eligibility for special education services based on the evaluations and assessments conducted. After a thorough review, we have determined that your child is eligible for special education services under the categories of Specific Learning Disability (SLD) and Other Health Impairment (OHI).

Evaluation procedures, tests, records, or reports that were used as a basis for the action above include:

☒ Kaufman Test of Educational Achievement, 3rd Edition (KTEA-3) Comprehensive Form

☒ Cognitive Assessment System, 2nd Edition (CAS-2)

☒ Observation(s)

☒ Response to Intervention (Rti) Data

4

☐ Are there any 'Other' evaluation procedures, tests, records, or reports that were used as a basis for the above actions?

**SAVE**

(5) Enter as many options considered and why they were rejected as necessary. At least one is required.

▼ Option(s) Considered and Rejected

Option(s) Considered

We considered that William would not be eligible under the category of Other Health Impairment.

5

Why Rejected

We rejected this option as he met the eligibility criteria and his trouble with attention and focus adversely impact his ability to concentrate and learn at the same rate as his peers.

Option(s) Considered

Why Rejected

- (6) Enter any other factors that were considered relevant to the decision.
- (7) Enter the names and phone numbers of LEA contacts.
- (8) Select Agency information to include in the PWN.

Decision

If other factors were relevant to this decision, they are described:  
We would like to note that no other factors were considered relevant to this decision, and we are committed to providing William with the appropriate special education services to support his academic success and well-being.

Name of a Contact Person:  
Mrs. Harper Cromwell, School Psychologist II

Phone Number of Contact Person:  
803-555-5555

Name of a Second Contact Person:  
Mary Adams, Special Education Teacher

Phone Number of Second Contact Person:  
803-555-4444

Agency Information

☒ Able South Carolina

☒ South Carolina Department of Education

☒ Family Resource Center

- (9) Select the appropriate option, in this case we will select Option 1.
- (10) Click the "Create Final Prior Written Notice" to create the PWN.

Initial Placement Only

☒ Option 1: Parent was present at the meeting. If the contact person has not received a verbal or written notification of a disagreement, or parent has not filed a request for due process hearing, the school will assume the parent to be in agreement with the committee and will implement team recommendations.

☐ Option 2: Parent was not present at the meeting; IEP and this notice of change in educational placement was sent home for parent review. If parent has not filed a request for due process hearing, the school will implement team recommendations.

☐ Option 3: none.

CREATE DRAFT PRIOR WRITTEN NOTICE

CREATE FINAL PRIOR WRITTEN NOTICE

BACK

SAVE

A PDF of the PWN opens in another window. This document will now also appear in the students Documents page that can be accessed from the top menu (11).

STUDENT INFO
ELIGIBILITY/REEVAL
IEP
ISP PROCESS
DOCUMENTS
11

William P Saturday  
HOME / DASHBOARD / DOCUMENTS

William P Saturday  
626744 | Dorchester Elementary School

UPLOAD EXTERNAL DOCUMENT(S)

Documents created for William P Saturday (School Year: 2022-2023) VIEW ALL

| Doc ID | Date Generated | Generated By    | Document  | Batch | Status | Signatures |
|--------|----------------|-----------------|---|-------|--------|------------|
| 411    | 03/16/2023     | Harper Cromwell | Prior Written Notice - Connect                        | PDF   | Final  |            |
| 410    | 03/16/2023     | Harper Cromwell | Eligibility Determination                             | PDF   | Final  |            |
| 407    | 03/16/2023     | Harper Cromwell | Specific Learning Disabilities Criteria Worksheet     | PDF   | Final  |            |
| 405    | 03/16/2023     | Harper Cromwell | Other Health Impairment Disability Criteria Worksheet | PDF   | Final  |            |
| 398    | 03/14/2023     | Harper Cromwell | Comprehensive Initial Evaluation Report               | PDF   | Final  |            |
| 396    | 03/10/2023     | Harper Cromwell | Consent to Evaluate                                   | PDF   | Final  |            |
| 395    | 03/10/2023     | Harper Cromwell | Evaluation Planning                                   | PDF   | Final  |            |
| 394    | 03/10/2023     | Harper Cromwell | Evaluation Planning                                   | PDF   | Final  |            |
| 392    | 03/10/2023     | Harper Cromwell | Authorization Of Release                              | PDF   | Final  |            |
| 391    | 03/10/2023     | Harper Cromwell | Medical Evaluation for Physically Impaired Document   | PDF   | Final  |            |

That completes the Initial Eligibility process in EDPlan. If the user selects the Eligibility/Reeval page from the top menu (12), they will be able to see the completed sections in green (13). They will also see that from this page they can go to the next actions which include drafting the IEP (14) and obtaining Consent for Initial Provision of Services (15).

edplan
FIND STUDENTS
WIZARDS
MY ACCOUNT
REPORTING
W. SATURDAY

STUDENT INFO
12
ELIGIBILITY/REEVAL
IEP
ISP PROCESS
DOCUMENTS

SC Reference  
HOME / DASHBOARD / ELIGIBILITY/REEVAL / INITIAL ELIGIBILITY

William P Saturday  
626744 | Dorchester Elementary School

Initial Eligibility

Evaluation Planning
13

Consent To Evaluate

Evaluation Summary Results

Eligibility Determination

Draft the IEP
14

Consent for Provision of Services
15

Stop Process