



# Report Writing

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## About me

- School psych/  
neuropsychologist
- Director supporting CA  
Special Education  
Teachers completing their  
credential process
- Educational Consultant  
and Licensed Educational  
Psychologist



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## WE WILL COVER...

- Legal Requirements for Reports
- Helpful and Defensible Reports



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## Resources

- High-Impact Assessment Reports for Children and Adolescents (Lichtenstein & Ecker, 2019)
- Writing Useful, Accessible, and Legally Defensible Psychoeducational Reports (Hass & Carriere, 2014)
- Essentials of Assessment Report Writing, Second Edition (Schneider, Lichtenberger, Mather & Kaufman, 2018)



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## Acknowledgements

- There are many ways to write a report
- Some psychologists work in districts with specific templates
- Psychologists are trained to write reports in different ways
- Sometimes the feedback we receive from district leadership changes from one leader to another
- I write the cognitive section by processing area and not by test

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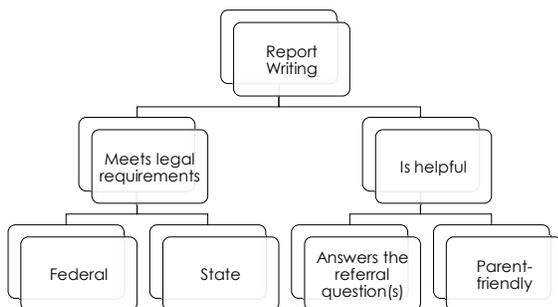
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## Federal and State Regulations regarding Evaluations & Reports



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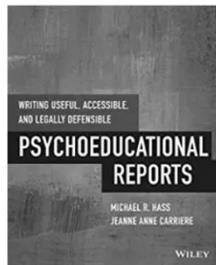
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## Report Writing

- Determine what is required in your report and what needs to be true in your report



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## If you had all the time in the world

- What are 2 things you would want your special education director or the school district's attorney to say about your report?

1. \_\_\_\_\_

2. \_\_\_\_\_

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## CA Education Code 56327



The personnel who assess the pupil shall prepare a written report, or reports, as appropriate, of the results of each assessment. The report shall include, but not be limited to, all the following:

- (a) Whether the pupil may need special education and related services.
- (b) The basis for making the determination.

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## Eligibility Discussions

- While the final decision about eligibility is up to the IEP team, it is the responsibility of the school psychologist (or SLP) to indicate the basis for making a determination for a student's eligibility.
- Typically we include federal and/or state education code and this discuss.
  - Be careful about adding in terminology that may make it sound like education code.

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## OHI – Federal Definition

- Other health impairment means having limited strength, vitality, or alertness, including a heightened alertness to environmental stimuli, that results in limited alertness with respect to the educational environment that:
  - (A) Is due to chronic or acute health problems such as asthma, attention deficit disorder or attention deficit hyperactivity disorder, ...and Tourette syndrome; and
  - (B) Adversely affects a child's educational performance.

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## OHI – CA State Definition

- Other Health Impairment is indicated when, "A pupil has limited strength, vitality or alertness, due to chronic or acute health problems, including but not limited to a heart condition, ...and hemophilia which adversely affects a pupil's educational performance. In accordance with Section 56026(e) of the Education Code, such physical disabilities shall not be temporary in nature as defined by Section 3001(v)."

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## Chronic/Acute Health Problems

- The lists in federal and state code are illustrative and not exhaustive
- Mental health concerns *could* qualify under OHI if cause limited strength, vitality and alertness
  - Anxiety
  - Depression
  - Bipolar Disorder
  - Panic Attacks

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## OHI: Chronic or Acute Health Problems

- OHI does NOT require a formal diagnosis by a doctor
  - If a district requires a medical evaluation, evaluation must be at no cost to parents
- A diagnosis alone does not suffice for eligibility under OHI
  - Doctor's don't diagnose OHI, but we cannot ignore the doctor's note either
  - Must meet other two "prongs"

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## ADHD and OHI

- If you are going to say a student has attentional issues under OHI and there is no formal diagnosis, what are you looking at?
  - RIOT
- Are the attentional issues due to a health impairment or an adverse reaction to school being hard?
  - Your educational history needs to include information from report cards/teacher comments
  - Parent interview needs to document history of attentional concerns

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## Limited Strength, Vitality & Alertness

- These terms are not defined within education code
- This includes a "heightened alertness to environmental stimuli"
- No requirement that the limitation be "physical" in nature

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## "Adverse Effect"

- Not defined by law
- Must consider both academic and non-academic performance
  - Grades and performance in class (not the same as SLD)
  - Attendance – is the student missing school because of health condition?
  - Socialization – does the student have a friend?
  - Extracurricular activities

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### “Adverse Effect”

- Student's needs must require specially designed instruction that cannot be addressed in the general education setting

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### OHI and Eligibility Statements

- 3 Prongs
  - Health impairment (diagnosed or suspected)
  - Limited Strength, Vitality, or Alertness
  - Significantly impacting educational performance

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### OHI Eligibility Statement #1

- John does demonstrate symptoms commonly seen in students with a health impairment (ADHD-like symptoms). Additionally, based on previous and current teacher and parent input, symptoms related to this suspected health impairment have limited his alertness as he requires frequent redirection and prompting. He continues to struggle to turn in work (educational impact). Therefore, he does appear to meet the eligibility requirements for special education under the classification of Other Health Impairment.

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### OHI Eligibility Statement #2

As noted previously in the report, Jane has a documented history of anemia; however, there has not been consistent comments that would indicate that side effects from anemia are impacting her functioning at the school. While some attentional concerns have been noted, and a recent diagnosis of ADHD was given by her doctor, based upon observations as well as teacher input, her attentional difficulties do not appear to be at a significant level at this time.

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### OHI Eligibility Statement #2, cont...

Jane does demonstrate some anxious behavior; however, based upon observations and teacher input, symptoms related to anxiety do not appear to be causing limited strength, vitality or alertness at this time. Therefore, Jane does not appear to meet the eligibility requirements for special education under the classification of Other Health Impairment at this time.

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### OHI Eligibility Statement #3

While there have been some documented concerns with regard to Jane's attention and distractibility, there is not enough evidence at this time to indicate a health impairment that is limiting her strength, vitality, or alertness. Parent ratings of attention and executive functioning do not indicate any specific concerns. At this time, her distractibility is likely impacted by her speech/language impairment. She does not appear to meet the eligibility criteria under Other Health Impairment at this time; this eligibility classification should be monitored.

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### CA Education Code 56327



- (c) The relevant behavior noted during the observation of the pupil in an appropriate setting.
  - Observation of a student is a required component
  - If you cannot do an observation, document why and then do a structured interview with the teacher(s).

[www.tinyurl.com/JP-ReportWriting](http://www.tinyurl.com/JP-ReportWriting)

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### CA Education Code 56327



- (d) The relationship of that behavior to the pupil's academic and social functioning.
  - Either formally include this language and/or ensure that you have clearly documented this information
  - I use the end of the social/emotional/behavioral section
    - I summarize (1) behavior (2) impact on education and (3) impact on social functioning

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### CA Education Code 56327



- (e) The educationally relevant health and development, and medical findings, if any.
  - Hearing and vision are exclusionary factors so you need to include that information within health background
  - Initials → birth history and developmental milestones
  - Triennials → summarize and refer back to previous report (unless they did not do it)

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### CA Education Code 56327



- (f) For pupils with learning disabilities, whether there is such a discrepancy between achievement and ability that it cannot be corrected without special education and related services.
  - In order to document that is "cannot be corrected without special education and related services" your educational background needs to lay the foundation.
  - Careful about copy/paste – can it be read once printed?

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### Educational History

- Attendance (exclusionary factor)
- Report card summaries (how has student been progressing towards standards?)
- Behavior infractions
- History of interventions (include SST and/or 504 meetings)
- Triennials – reference previous report and them summarize the last three years of report cards, IEP documents, etc.

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### CA Education Code 56327



- (g) A determination concerning the effects of environmental, cultural, or economic disadvantage, where appropriate.
  - You cannot just state that you looked at this. It must be documented in the report.
  - Access to insurance, whether parents have jobs, impact of COVID on family
  - What information in your district's health/development questionnaire could be useful?

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## CA Education Code 56327



- (h) The need for specialized services, materials, and equipment for pupils with low incidence disabilities, consistent with guidelines established pursuant to Section 56136.
  - Remember OI students need an education specialist with an OI added authorization or PHI credential for every IEP

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## Evidence/Documentation

- What documentation or evidence do you need to include in your report to show that you met each requirement?
- Could you point to a specific page in your report where this is documented?

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## Evidence/Documentation

- Example
  - The relevant behavior noted during the observation of the pupil in an appropriate setting → page 5 has the write-up of my classroom and recess observations that I completed



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## Evidence/Documentation

- Non-example
  - A determination concerning the effects of environmental, cultural, or economic disadvantage, where appropriate. → Page 2 of the report has the following sentence, "Environmental, cultural, and economic status was taken into consideration for this report."



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## Assessment Requirements 20 US Code 1414 (b)

- (2) CONDUCT OF EVALUATION** In conducting the evaluation, the local educational agency shall—
- **(A)** use a variety of assessment tools and strategies to gather relevant functional, developmental, and academic information, including information provided by the parent, that may assist in determining—
    - **(i)** whether the child is a child with a disability; and
    - **(ii)** the content of the child's individualized education program, including information related to enabling the child to be involved in and progress in the general education curriculum, or, for preschool children, to participate in appropriate activities;

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## Assessment Requirements 20 US Code 1414 (b)

- **(B)** not use any single measure or assessment as the sole criterion for determining whether a child is a child with a disability or determining an appropriate educational program for the child; and
- **(C)** use technically sound instruments that may assess the relative contribution of cognitive and behavioral factors, in addition to physical or developmental factors.

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Assessment Requirements  
20 US Code 1414 (b)

**(3) ADDITIONAL REQUIREMENTS:** Each local educational agency shall ensure that—

- **(A)** assessments and other evaluation materials used to assess a child under this section—
  - **(i)** are selected and administered so as not to be discriminatory on a racial or cultural basis;
  - **(ii)** are provided and administered in the language and form most likely to yield accurate information on what the child knows and can do academically, developmentally, and functionally, unless it is not feasible to so provide or administer;

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Assessment Requirements  
20 US Code 1414 (b)

- **(iii)** are used for purposes for which the assessments or measures are valid and reliable;
- **(iv)** are administered by trained and knowledgeable personnel; and
- **(v)** are administered in accordance with any instructions provided by the producer of such assessments;
- **(B)** the child is assessed in all areas of suspected disability;

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Assessment Requirements  
20 US Code 1414 (b)

- **(C)** assessment tools and strategies that provide relevant information that directly assists persons in determining the educational needs of the child are provided; and
- **(D)** assessments of children with disabilities who transfer from 1 school district to another school district in the same academic year are coordinated with such children's prior and subsequent schools, as necessary and as expeditiously as possible, to ensure prompt completion of full evaluations.

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## Document the Evidence

- Copying/pasting federal and/or state language in your report does not prove that you met the requirements



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## Federal Regulations

- Requires that school districts assess in all areas of suspected disability
  - What do parents and teachers suspect?
  - What do you and the assessment team members suspect?
- If suspected, we assess → child find is based on suspicion of disability and not whether the student will likely be found eligible
  - Cannot delay assessment if the student is in a RTI/MTSS process (January 2011 OSEP Memo)
- If it is suspected, then discuss it within your report

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## Eligibility Discussions

- Three parts to eligibility
  1. Student must have a disability
  2. That adversely affects educational performance
  3. Because of that disability, the student requires special education (needs cannot be met in the general education program)
- Your eligibility discussion should document all 3

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## Helpful Reports



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### If you had all the time in the world

- What are 2 things you would want a parent to say about your report?

1. \_\_\_\_\_

2. \_\_\_\_\_

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### What Makes a Report Helpful?

- Explaining all jargon and acronyms
  - You can check the readability level of your report in both Google Docs and Microsoft Word
- Answering the referral question(s)
- Identifying the student's needs, if applicable
- Integrating the information of the section/report

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## Credible Assessors

- Refrain from sloppy errors
  - Using updated language (Autism eligibility in CA)
  - Inconsistencies (one sentence calls the area a strength and then a weakness)
  - Inclusion of "his/her" and other "template" language
- Follow test instructions
  - If deviating from standardization, include and explain why

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## Jenny's Reflection #1

- 
- Writing up cognitive/processing results as well as the social, emotional, and behavioral results
    - Started with "typical" grad school writing style
    - Tried to add examples in the text
    - Added a table for cognitive/processing at the end of the section
    - Moved to adding the explanation of each task in the table and leaving the narrative to discuss what I learned

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## Jenny's Reflection #2

- Educational history for re-evaluations
  - In the past, I would write (1) report card information (2) summary of previous evaluations and (3) summary of IEP meetings
  - Now, I write in chronological order

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### Jenny's Reflection #3

- Adding questions to each section
  - What was I looking for in this section?
  - What did I find?

[www.tinyurl.com/JP-Summarize](http://www.tinyurl.com/JP-Summarize)

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### What am I Working on Next?

- My educational history sections could use additional explanations of previous findings
- My educational history could use a summary
- Summarizing all of the findings
- Adding checkboxes to eligibility discussions

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[www.jennyponzuric.com](http://www.jennyponzuric.com)

- Ask follow-up questions
- Sign up for newsletter
- Review resources

*thank you!*

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Legally Defensible and Helpful Reports

CA Education Code Report Requirement	What evidence/documentation do I need to include that would show that I met this requirement?	Which page could I find that on in my report?
(a) Whether the pupil may need special education and related services.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(b) The basis for making the determination.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(c) The relevant behavior noted during the observation of the pupil in an appropriate setting.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(d) The relationship of that behavior to the pupil's academic and social functioning.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(e) The educationally relevant health and development, and medical findings, if any.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(f) For pupils with learning disabilities, whether there is such a discrepancy between achievement and ability that it cannot be corrected without special education and related services.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(g) A determination concerning the effects of environmental, cultural, or economic disadvantage, where appropriate.	<ul style="list-style-type: none"> <li>•</li> </ul>	
(h) The need for specialized services, materials, and equipment for pupils with low incidence disabilities, consistent with guidelines established pursuant to <a href="#">Section 56136</a> .	<ul style="list-style-type: none"> <li>•</li> </ul>	

Section of the Report	What is required?	What could I add to this section of the report to make it more helpful for the reader?
Reason for Referral	<ul style="list-style-type: none"> <li>Document who originally referred the student</li> <li>Document the original concerns</li> </ul>	
Background – Medical/Developmental	<ul style="list-style-type: none"> <li>Document whether there are any relevant medical findings</li> </ul>	
Background - Educational	<ul style="list-style-type: none"> <li>Document how long the concerns have been noted/provide a historical perspective</li> <li>Document what concerns have been noted</li> <li>Document what general education has already attempted</li> </ul>	
Observations	<ul style="list-style-type: none"> <li>Document observations of the student in an appropriate setting (class, social, etc.)</li> </ul>	
Cognitive/Processing Findings, if applicable	<ul style="list-style-type: none"> <li>Document test(s) administered, other data gathered, scores obtained, and interpretation of the results</li> </ul>	
Academic Findings	<ul style="list-style-type: none"> <li>Document test(s) administered, other data gathered, scores obtained, and interpretation of the results</li> </ul>	

Section of the Report	What is required?	What could I add to this section of the report to make it more helpful for the reader?
Social, Emotional, and Behavioral Findings	<ul style="list-style-type: none"> <li>Document test(s) administered, other data gathered, scores obtained, and interpretation of the results</li> </ul>	
Adaptive Findings, if applicable	<ul style="list-style-type: none"> <li>Document test(s) administered, other data gathered, scores obtained, and interpretation of the results</li> </ul>	
Summary of Findings	<ul style="list-style-type: none"> <li>Explain what the team learned about the student</li> <li>Identify needs of the student</li> </ul>	
Eligibility	<ul style="list-style-type: none"> <li>Review eligibility classifications considered and whether the student meets the criteria</li> </ul>	
Recommendations, Suggestions, etc.	<ul style="list-style-type: none"> <li>Provide suggestions for the team to consider</li> </ul>	