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Introduction

This document is intended to provide school teams guidance when planning for student needs, considering referrals for evaluations, and completing evaluations/re-evaluations for educational disabilities. Disability definitions and required evaluation procedures and can be found individually on the Tennessee Department of Education website (here).¹

Every educational disability has a state definition, found in the TN Board of Education Rules and Regulations Chapter 0520-01-09,² and a federal definition included in the Individuals with Disabilities Education Act (IDEA). While states are allowed to further operationally define and establish criteria for disability categories, states are responsible to meet the needs of students based on IDEA's definition. Both definitions are provided for comparison and to ensure teams are aware of federal regulations.

The student must be evaluated in accordance with IDEA Part B regulations, and such an evaluation must consider the student's individual needs, must be conducted by a multidisciplinary team with at least one teacher or other specialist with knowledge in the area of suspected disability, and must not rely upon a single procedure as the sole criterion for determining the existence of a disability. Both nonacademic and academic interests must comprise a multidisciplinary team determination, and while Tennessee criteria is used, the team possess the ultimate authority to make determinations.³

**IDEA Orthopedic Impairment Definition**

Per 34 C.F.R. §300.8(c)(8) orthopedic Impairment means “a severe orthopedic impairment that adversely affects a child’s educational performance. The term includes impairments caused by a congenital anomaly, impairments caused by disease (e.g., poliomyelitis, bone tuberculosis), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns that cause contractures).”

**Section I: Tennessee Definition**

**Tennessee Definition of Orthopedic Impairment**

Orthopedic impairment means a severe orthopedic impairment that adversely affects a child's educational performance. The term includes, but is not limited to, impairments caused by congenital anomaly (e.g., club foot, absence of some member), impairments caused by disease

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³ Office of Special Education Programming Letter to Pawlisch, 24 IDELR 959
(e.g., poliomyelitis, bone tuberculosis), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns that cause contractures).

**What does this mean?**

An orthopedic impairment is a physical disability involving the skeletal and/or muscular system that prevents or hinders a child to effectively use his/her own body. There are diverse reasons a student may demonstrate an orthopedic impairment including diseases, disorders, congenital anomaly (differences present at birth), and injury. A medical diagnosis of an impairment, while important for school team consideration, is not sufficient to meet criteria for special education and related services. While many students may have a medically-documented physical impairment, a child's condition must also adversely affect educational performance. The examples provided here or in the definition are not inclusive of all of the impairments, diseases and disorders which can be classified under orthopedic impairments, thus the addition of the phrase, “but is not limited to,” in the Tennessee orthopedic impairment definition. The American Academy of Special Education Professionals (AASEP) provides resources on different types of orthopedic impairments.4

Project IDEAL outlines types of orthopedic impairments that may be acquired or congenital:5

- neuromotor impairments: an abnormality of, or damage to the brain, spinal cord, or nervous system that sends impulses to the muscles of the body (e.g., cerebral palsy, spina bifida, spinal cord injury);
- degenerative diseases: diseases that affect motor movement or development and typically get worse over time: (e.g., muscular dystrophy, spinal muscular atrophy, poliomyelitis, bone tuberculosis); and
- musculoskeletal disorders: defects and diseases of the muscles or bones (e.g., limb deficiencies, amputations, clubfoot, arthrogryposis, fractures, or burns that cause contractures, rheumatoid arthritis, osteogenesis imperfecta).

Assessing the severity and educational impact of an orthopedic impairment is largely determined by the unique individual needs of the child and is not solely based on a diagnosis. In fact, individuals with the same diagnosis may demonstrate different functional limitations and ways in which the condition impacts specific child's educational experience.

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4 [http://aasep.org/professional-resources/exceptionalstudents/orthopedicimpairment/](http://aasep.org/professional-resources/exceptionalstudents/orthopedicimpairment/)
5 Project IDEAL was developed by the Texas Council for Developmental Disabilities. It is important to remember that each state may define educational definitions somewhat differently, but all are required to meet IDEA regulations. Information was retrieved from: [http://www.projectidealonline.org/v/orthopedic-impairments/](http://www.projectidealonline.org/v/orthopedic-impairments/)
**Adversely Affects a Child's Educational Performance**

One of the key factors in determining whether a student demonstrates an educational disability under IDEA and state special education rules, is that the defined characteristics of the disability adversely affect a child's education performance. The impact of those characteristics must indicate that s/he **needs** the support of specially designed instruction or services beyond accommodations and interventions of the regular environment. When considering how to determine this, teams should consider if the student **requires** specially designed instruction in order to benefit from his/her education program based on identified deficits that could impact a student's performance such as the inability to communicate effectively, significantly below average academic achievement, the inability to independently navigate a school building, or the inability to take care of self-care needs without support. Therefore, how disability characteristics may adversely impact educational performance applies broadly to educational performance, and teams should consider both quantity and quality of impact in any/all related areas (e.g., academic, emotional, communication, social, etc.).

**Section II: Pre-referral and Referral Considerations**

The Special Education Framework provides general information related to pre-referral considerations and multi-tiered interventions in component 2.2. It is the responsibility of school districts to seek ways to meet the unique educational needs of all children within the general education program prior to referring a child to special education. By developing a systematic model within general education, districts can provide preventative, supplementary differentiated instruction and supports to students who are having trouble reaching benchmarks.

**Pre-referral Interventions**

Students who have been identified as at risk will receive appropriate interventions in their identified area(s) of deficit. These interventions are determined by school-based teams by considering multiple sources of academic and behavioral data.

One way the Tennessee Department of Education (“department”) supports prevention and early intervention is through multi-tiered systems of supports (MTSS). The MTSS framework is a problem-solving system for providing students with the instruction, intervention, and supports they need with the understanding there are complex links between students’ academic and behavioral, social, and personal needs. The framework provides multiple tiers of interventions with increasing intensity along a continuum. Interventions should be based on the identified needs of the student using evidenced-based practices. Examples of tiered intervention models include Response to Instruction and Intervention (RTI²), which focuses on academic instruction...
and support, and Response to Instruction and Intervention for Behavior (RTI\textsuperscript{2}-B). Within the RTI\textsuperscript{2} Framework and RTI\textsuperscript{2}-B Framework, academic and behavioral interventions are provided through Tier II and/or Tier III interventions (see MTSS Framework, RTI\textsuperscript{2} Manual, & RTI\textsuperscript{2}-B Manual).

These interventions are \textit{in addition to}, and not in place of, on-grade-level instruction (i.e., Tier I). It is important to recognize that ALL students should be receiving appropriate standards-based differentiation, remediation, and reteaching, as needed in Tier I, and that Tiers II and III are specifically skills-based interventions.

It is important to document data related to the intervention selection, interventions (including the intensity, frequency, and duration of the intervention), progress monitoring, intervention integrity and attendance information, and intervention changes to help teams determine the need for more intensive supports. This also provides teams with information when determining the least restrictive environment needed to meet a student’s needs.

\begin{center} \textbf{Cultural Considerations} \end{center}

Interventions used for EL students must include evidence-based practices for ELs.

\begin{center} \textbf{Characteristics and Risk Factors of Orthopedic Impairments} \end{center}

Educational staff and parents should pay special attention to any functional limitations that a student with an orthopedic impairment may display in the educational setting. The school team should address presented limitations to prevent adverse impacts when possible. Referrals for additional protections and services may be necessary in order to meet student needs. While not an exhaustive list, the following are possible functional limitations resulting from the orthopedic impairment that can affect school performance:

- motor movement limitations (e.g., prevents access to/participation in the school environment due to difficulty manipulating standard classroom equipment or performing typical classroom routines, raises concerns with emergency preparedness/safety)
- restricted communication (e.g., dyspraxia, apraxia, expressive/receptive communication deficits which impact the ability to gain new information or effectively participate in classroom activities)
- fatigue and endurance limitations (e.g., side effects of seizure and other medications or fatigue due to increased effort to move which decreases attention and ability for learning)
- health factors (e.g., chronic pain, feeling ill, absenteeism)
• experiential deficits (e.g., physical disability creates a lack of experience and exploration which can negatively affect comprehension and may result in lower achievement or depressed cognitive scores)
• neurocognitive impairments (e.g., students with spina bifida have a predisposition for distractibility, disorganization, visual-motor deficits, fine motor dysfunction, restlessness, visual abnormalities, and language impairments)

A child may experience psychosocial and motivational challenges as a result of adjusting to his/her condition. Examples of psychosocial and environmental factors include:
• motivation
  o internal factors (e.g., self-efficacy or confidence level, learned helplessness, feelings of hopeless)
  o external factors (e.g., how others react to the student, competing priorities)
• self-concept and self-esteem (e.g., reaction to their own disability can lead to feelings of isolation, poor self-esteem, depression)
• social competence (e.g., difficulty relating to others and developing social supports)
• behavioral and emotional functioning (e.g., emotional challenges related to limitations may impact daily functioning and behaviors, developing the ability for self-advocacy)
• learning environment
  o task demands (e.g., specific situations or activities may create problems with participation without accommodations or adaptations)
  o expectations (e.g., stereotypes, negative or limiting assumptions)
  o physical environment (e.g., structure and layout of environment may create inaccessibility issues)

**The School Team’s Role**

A major goal of the school-based pre-referral intervention team is to adequately address students’ academic and behavioral needs. The process recognizes many variables affecting learning. Thus, rather than first assuming the difficulty lies within the child, team members and the teacher should consider a variety of variables that may be at the root of the problem, including the curriculum, instructional materials, instructional practices, and teacher perceptions.

When school teams meet to determine intervention needs, there should be an outlined process that includes:  

• documentation, using multiple sources of data, of difficulties and/or areas of concern;
• a problem-solving approach to address identified concerns

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6 National Alliance of Black School Educators (2002). *Addressing Over-Representation of African American Students in Special, Education*
• documentation of interventions, accommodations, strategies to improve area(s) of concern;
• intervention progress monitoring and fidelity;
• a team decision-making process for making intervention changes and referral recommendations based on the student’s possible need for more intensive services and/or accommodations; and
• examples of pre-referral interventions and accommodations.

**Pre-referral Strategies and Considerations for Orthopedic Impairments**

Pre-referral interventions and accommodations should be individualized and based on the needs of the student. The school team should begin by identifying challenges the student is experiencing and then problem solve ways to address factors effectively within the general education setting. For most students with orthopedic impairments, accommodations can be implemented which enable the student access to academic instruction. Some common pre-referral interventions and/or general education accommodations include:

- arrange classroom to accommodate space for mobility and access,
- provide preferential seating in classroom and appropriate sized chair or desk,
- consider scheduling classrooms close to minimize distance walked throughout the day,
- allow extra time to get to and from locations in the school,
- allow student to leave early or late from class to avoid crowded hallways,
- assign a buddy for safety and or to carry books, backpack, supplies, etc.,
- extra books in each classroom and/or for home,
- make adaptations (e.g., computer/assistive technology, adaptive PE) to accommodate disability,
- increased time for response,
- schedule rest breaks (as needed),
- allow the use of the elevator (if available and appropriate) to avoid fatigue,
- provide positive support, encourage socialization and inclusion,
- educate classmates and school about the disability in a positive way, and
- may need oral as opposed to written reports or tests.

**Referral Information: Documenting Important Pieces of the Puzzle**

When considering a referral for an evaluation the team should review all information available to help determine whether the evaluation is warranted and determine the assessment plan. The following data from the general education intervention phase that can be used includes:

1) reported areas of educational performance difficulty,
2) documentation of the problem, medical history, and/or reports documenting impairments; ask the parent about precautions and contraindications associated with assisting the student or for student participation
   a. review medication side effects (if applicable)
   b. weight bearing standard for the student (i.e., student may be under doctor's orders to not put weight through a particular leg or arm)
   c. body mechanics needed when lifting/assisting student with transfers (if known)
   d. adaptations for participation
   e. equipment needs and use (e.g., wheelchair, walker, adaptive equipment that the student is currently using, etc.)
   f. special diets or snacks
   g. accommodation needs in times of safety evacuations or responses
   h. toileting protocol
   i. field trip needs
   j. review individualized health plans (if applicable, school based)
3) records or history of significant developmental delays across all learning domains,
4) record of modifications attempted,
5) school attendance and school transfer information,
6) multi-sensory instructional alternatives, and
7) continued lack of progress

**TN Assessment Team Instrument Selection Form**

In order to determine the most appropriate assessment tools, to provide the best estimate of skill or ability, for screenings and evaluations, the team should complete the TN Assessment Instrument Selection Form (TnAISF) (see Appendix A). The TnAISF provides needed information to ensure the assessments chosen are sensitive to the student's:
- cultural-linguistic differences;
- socio-economic factors; and
- test taking limitations, strengths, and range of abilities.

**Section III: Comprehensive Evaluation**

When a student is suspected of an educational disability and/or is not making progress with appropriate pre-referral interventions that have increased in intensity based on student progress, s/he may be referred for a psychoeducational evaluation. A referral may be made by the student's teacher, parent, or outside sources at any time.

7 Individualized health plans provide a plan in the school setting to address health needs (e.g., diagnoses, medications and potential side effects that may require nursing care, administration of medication, response plans for health based needs during school day, and emergency care plans)
Referral information and input from the child's team lead to the identification of specific areas to be included in the evaluation. All areas of suspected disability must be evaluated. In addition to determining the existence of a disability, the evaluation should also focus on the educational needs of the student as they relate to a continuum of services. Comprehensive evaluations shall be performed by a multidisciplinary team using a variety of sources of information that are sensitive to cultural, linguistic, and environmental factors or sensory impairments. The required evaluation participants for evaluations related to suspected disabilities are outlined in the eligibility standards. Once written parental consent is obtained, the school district must conduct all agreed upon components of the evaluation and determine eligibility within sixty (60) calendar days of the district's receipt of parental consent.

**Cultural Considerations: Culturally Sensitive Assessment Practices**

IEP team members must understand the process of second language acquisition and the characteristics exhibited by EL students at each stage of language development if they are to distinguish between language differences and other impairments. The combination of data obtained from a case history and interview information regarding the student's primary or home language (L1), the development of English language (L2) and ESL instruction, support at home for the development of the first language, language sampling and informal assessment, as well as standardized language proficiency measures should enable the IEP team to make accurate diagnostic judgments. Assessment specialists must also consider these variables in the selection of appropriate assessments. Consideration should be given to the use of an interpreter, nonverbal assessments, and/or assessment in the student's primary language. Only after documenting problematic behaviors in the primary or home language and in English, and eliminating extrinsic variables as causes of these problems, should the possibility of the presence of a disability be considered.

**English Learners**

To determine whether a student who is an English learner has a disability it is crucial to differentiate a disability from a cultural or language difference. In order to conclude that an English learner has a specific disability, the assessor must rule out the effects of different factors that may simulate language disabilities. One reason English learners are sometimes referred for special education is a deficit in their primary or home language. No matter how proficient a student is in his or her primary or home language, if cognitively challenging native language instruction has not been continued, he or she is likely to demonstrate a regression in primary or home language abilities. According to Rice and Ortiz (1994), students may exhibit a decrease in primary language proficiency through:

- inability to understand and express academic concepts due to the lack of academic instruction in the primary language,
- simplification of complex grammatical constructions,
- replacement of grammatical forms and word meanings in the primary language by those in English, and
- the convergence of separate forms or meanings in the primary language and English.

These language differences may result in a referral to special education because they do not fit the standard for either language, even though they are not the result of a disability. The assessor also must keep in mind that the loss of primary or home language competency negatively affects the student’s communicative development in English.

In addition to understanding the second language learning process and the impact that first language competence and proficiency has on the second language, the assessor must be aware of the type of alternative language program that the student is receiving.

The assessor should consider questions such as:

- In what ways has the effectiveness of the English as a second language (ESL) instruction been documented?
- Was instruction delivered by the ESL teacher?
- Did core instruction take place in the general education classroom?
- Is the program meeting the student’s language development needs?
- Is there meaningful access to core subject areas in the general education classroom? What are the documented results of the instruction?
- Were the instructional methods and curriculum implemented within a sufficient amount of time to allow changes to occur in the student’s skill acquisition or level?

The answers to these questions will help the assessor determine if the language difficulty is due to inadequate language instruction or the presence of a disability.

It is particularly important for a general education teacher and an ESL teacher/specialist to work together in order to meet the linguistic needs of this student group. To ensure ELs are receiving appropriate accommodations in the classroom and for assessment, school personnel should consider the following when making decisions:

- Student characteristics such as:
  - Oral English language proficiency level
  - English language proficiency literacy level
  - Formal education experiences
  - Native language literacy skills
  - Current language of instruction
- Instructional tasks expected of students to demonstrate proficiency in grade-level content in state standards
Appropriateness of accommodations for particular content areas

*For more specific guidance on English learners and immigrants, refer to the English as a Second Language Program Guide (August 2016).

**Best Practices**
Evaluations for all disability categories require comprehensive assessment methods that encompass multimodal, multisource, multidomain and multisetting documentation.

- **Multimodal**: In addition to an extensive review of existing records, teams should gather information from anecdotal records, unstructured or structured interviews, rating scales (more than one; narrow in focus versus broad scales that assess a wide range of potential issues), observations (more than one setting; more than one activity), and work samples/classroom performance products.

- **Multisource**: Information pertaining to the referral should be obtained from parent(s)/caregiver(s), teachers, community agencies, medical/mental health professionals, and the student. It is important when looking at each measurement of assessment that input is gathered from all invested parties. For example, when obtaining information from interviews and/or rating scales, consider all available sources—parent(s), teachers, and the student—for each rating scale/interview.

- **Multidomain**: Teams should take care to consider all affected domains and provide a strengths-based assessment in each area. Domains to consider include cognitive ability, academic achievement, social relationships, adaptive functioning, response to intervention, and medical/mental health information.

- **Multisetting**: Observations should occur in a variety of settings that provide an overall description of the student's functioning across environments (classroom, hallway, cafeteria, recess), activities (whole group instruction, special area participation, free movement), and time. Teams should have a 360 degree view of the student.

**Evaluation Procedures**
A comprehensive evaluation performed by a multidisciplinary team using a variety of sources of information that are sensitive to cultural, linguistic, and environmental factors or sensory impairments to include the following:

1. Medical evaluation of the child's orthopedic impairment by a licensed medical provider (i.e., licensed medical physician, physician's assistant, or licensed nurse practitioner);
(2) Individually administered motor evaluation to address mobility and activities of daily living (e.g., maintaining and changing position, safety, movement through building, balance, self-care, eating, vocation/transition);

(3) Adaptive measure (e.g., communication, social, self-care, hygiene);

(4) Educational evaluation (may include individual and/or group educational achievement, classroom observations, criterion-referenced tests, curriculum-based assessments, review of child’s existing records, attendance, health); and

(5) Documentation, including observation and/or assessment, of how orthopedic impairment adversely affects the child’s educational performance in his/her learning environment and the need for specialized instruction and related services (i.e., to include academic and/or nonacademic areas).

**Evaluation Procedures Guidance**

**Standard 1: Medical evaluation of the child’s orthopedic impairment by a licensed medical provider (i.e., licensed medical physician, physician’s assistant or licensed nurse practitioner)**

The first standard indicates a medical diagnosis of a health condition is required in order to meet the qualifications of orthopedic impairment. Typically, a medical condition is known and the condition is causing an impact on educational performance, which prompts a referral for an evaluation in order to determine eligibility for services. In those cases, the parent should supply medical records or sign a release (see Appendix B for a sample release) in order for the school to obtain records. The records must indicate a diagnosis and recent (i.e., within the past year) medical evaluation documenting health conditions, prognosis, medications, and special procedures/diets or restrictions. A sample medical information form containing all necessary data to be included by the licensed medical provider can be found in Appendix C. However, if a new medical assessment is needed for the current evaluation or if the physician charges for a release of records, school districts must ensure the assessment is at no cost to the student’s parents.

A medical statement is a key component of the eligibility process and should include the child’s diagnosis (if available), prognosis, treatment recommendations, as well as previous medical and therapeutic interventions. This may assist the assessment team with better understanding how the condition may impact a child’s daily functioning. The evaluation report should summarize the medical findings and include the name of the medical provider involved. A copy of the received medical information obtained from the medical provider should be attached to the evaluation report/eligibility report. Medical information should include:

- name of licensed medical provider;
• date of medical documentation (within one calendar year of evaluation);
• diagnosis or statement of health problem (e.g., diagnostic impression), within one calendar year of evaluation (i.e., diagnoses are not limited to those provided in the state-provided definition);
• prognosis and special requirements of care;
• information, as applicable, regarding medications; and
• licensed medical provider's signature (hand-written, electronic or typed by medical provider's professional transcriptionist).

Types of acceptable records include:
• hospital or institutional records obtained directly from hospital or institutional setting via parent/guardian-signed HIPAA release; or
• medical provider’s office records obtained directly from office via parent/guardian-signed HIPAA release; or
• state form completed and signed by licensed medical provider; or
• hand-delivered documentation (e.g., parent/legal guardian, state department case worker, legally-appointed guardian ad litem) which includes the licensed medical provider's signature; or
• follow-up medical record/scribed notes with licensed medical provider's signature.

The office of special education and the office of civil rights has clearly indicated that if a medical evaluation is needed in order to obtain a medical diagnosis to determine the presence of a disability, the diagnosis must be provided at no cost to the parents.

**Standard 2: Individually administered motor evaluation to address mobility and activities of daily living (e.g., maintaining and changing position, safety, movement through building, balance, self-care, eating, toileting, clothing management, vocation/transition)**

The occupational and/or physical therapist should complete an individually administered test of motor functioning. In addition to a standardized assessment, observation of the child’s motor performance during functional activities within the school environment will be a key component of an appropriate assessment.

Administration of standardized assessments may be challenging due to possible communication, cognitive, and/or motor limitations of the child. In those instances, assessment specialists will need to collaborate on appropriate assessment instruments and adaptations that can be made that will adhere to the standardization of the assessment instrument(s) while providing the team with a true and accurate representation of the child’s abilities.
Standard 3: Adaptive measure (e.g., communication, social, self-care, hygiene)

This measure can be a formal (i.e., normative, standardized) or informal (i.e., indirect or direct checklist; see Appendix E-H for sample checklists) depending on the referral concerns and individual needs of the student. Classroom teacher input should be solicited through anecdotal report, completion of adaptive checklists or rating forms, as well as indirect and direct observations and should focus on the child's ability to access the curriculum with regard to functional mobility, gross and fine motor abilities, leisure and/or work skills, and ability to attend to instruction. Feedback as to the inadequacy of previous interventions and/or accommodations as well as information pertaining to the student's assets/strengths are crucial to the evaluation process and most readily solicited from the classroom teacher(s). A school psychologist may be called upon to assist in the completion of appropriate adaptive measures as well as to administer or interpret measures.

Parent input will be vital to gain insight into the child's successes and concerns during routines at home and school which include, but are not limited to, the areas of safety and mobility, leisure activities, and self-care routines. Depending on the age of the student, his/her input can be solicited as to barriers/frustrations resulting from identified motor deficits, priorities for success in the educational environment, as well as recreational and vocational interests.

Standard 4: Educational evaluation (may include individual and/or group educational achievement, classroom observations, criterion-referenced tests, curriculum-based assessments, review of child's existing records, attendance, health).

The educational evaluation (i.e., academic skills) can be reviewed in a variety of ways which assessment teams may take into consideration when planning for the evaluation. Some students with orthopedic conditions may demonstrate few academic deficits. A review of records (e.g., grades and how those grades may be modified, summative assessments, criterion-referenced tests, universal screening measures, and other curriculum-based measures) may be sufficient to document academic skills.

Individually administered standardized achievement tests may provide additional information based on referral concerns that might be necessary when determining present levels of academic performance and educational impact. However, it should be noted that the student's impairments may limit performance on standardized achievement assessments. This underperformance is not always due to low skills but may be the result of the child's motor limitations, decreased stamina and energy level, and/or medications impacting cognitive functioning. Therefore, the examiner should indicate whether results appear to be valid estimates of skills based on observation and teacher consultations. The examiner may include a testing of limits to help explore skills further.
The assessment team will complete a file review of the child's educational history. The purpose of the review is to help document factors contributing to areas of concern and whether or not those factors are related to the health condition. The evaluation should contain a summary of this information and indicate if there is a correlation to the child's condition.

For instance, all disabilities require that the assessment specialist(s) ensure a student's “lack of learning” is not due to “lack of instruction” (e.g., excessive absences). However, students with significant health and physical conditions may frequently be absent to address medical concerns which may in turn cause the child to fall behind peers academically. When absences are related to the actual condition it may be an indication of how the student’s disability is adversely impacting his/her educational performance. Therefore, the assessment team should review the child’s medical and treatment history with consideration for the student’s attendance record. The review may help the school team determine a need for services.

In order to gain further understanding of the child's engagement during instruction, study skills, and classroom performance, evaluations should include teacher, parent, and student input when appropriate (e.g., interviews, questionnaires, checklists). These skills should also be addressed as part of the required direct observations.

**Standard 5: Documentation**, including observation and/or assessment, of how orthopedic impairment adversely affects the child’s educational performance in his/her learning environment and the need for specialized instruction and related services (i.e., to include academic and/or nonacademic areas).

Documentation of adverse effect(s) in the learning environment is an essential component of determining the appropriate level of service. To ensure a special education level of service is the least restrictive environment, teams should provide extensive documentation of the prevention and intervention efforts, as well as the data indicating that these efforts in the general education setting are not adequate support for a student's needs. Documentation may include how the disability impacts academic performance, access to the general education curriculum, communication, prevocational skills, social skills, and the ability to manage personal daily needs and routines independently.

During the referral process, the team must identify the functional motor limitations and resulting participation restrictions affecting the student in order to develop an appropriate assessment plan. Prior accommodations/modifications will need to be considered to determine any concerns that were not satisfactorily supported in order to guide the eligibility assessment process. The occupational and/or physical therapist will be instrumental in gathering appropriate information from the student, parents, and other team members regarding the child's medical and therapeutic health history as it pertains to his/her diagnosis. This information should include a review of the child's sensory, gastrointestinal, integumentary,
cardiovascular/pulmonary, musculoskeletal, and/or neuromuscular systems. In addition, their expertise will be needed to assess the student's functional motor performance as it pertains to his/her ability to participate in meaningful school activities and daily routines with or without assistance.

Other school personnel may be appropriate to include on the assessment team, depending on the individual needs of the student as well as the policies and practices of the school district. A school psychologist or an assistive technology expert or a speech/language professional may also be included based on the specific communication and/or academic needs of the student. The evaluation should answer how this student's disability affects participation in the general education curriculum or, for preschoolers, participation in developmentally appropriate activities.

**Orthopedic Impairment Evaluation Participants**

Information shall be gathered from the following persons in the evaluation of orthopedic impairment:

1. The parent;
2. The child's general education classroom teacher(s);
3. A licensed special education teacher;
4. An occupational therapist or physical therapist;
5. A licensed medical provider (i.e., licensed physician, physician's assistant or licensed nurse practitioner; and
6. Other professional personnel as indicated (e.g., licensed school psychologist or assistive technology specialist).

**Evaluation Participants Guidance**

Below are examples of information participants may contribute to the evaluation.

1. The parent(s) or legal guardian(s):
   - Developmental and background history
   - Social/behavioral development
   - Current concerns
   - Other relevant interview information
   - Rating scales (e.g., adaptive measures)

2. The student's general education classroom teacher(s) (e.g., general curriculum/core instruction teacher):
   - Observational information
   - Rating scales or checklists (e.g., adaptive measures)
   - Work samples
• Curriculum based measures/ assessment results
• Criterion-referenced test results (e.g., TCAP, TN Ready, end of course tests, etc.)
• Other relevant quantitative/ qualitative data

(3) The student's special education teacher(s) (e.g., IEP development teacher/case manager):
  • Observational information
  • Pre-vocational checklists
  • Direct assessment (e.g., academic achievement test)
  • Transitional checklists/questionnaires/interviews
  • Vocational checklists/questionnaires/interviews
  • Other relevant quantitative/ qualitative data

(4) An occupational therapist or physical therapist diagnosis (as indicated above in evaluation procedures):
  • Individual motor evaluation
  • Observations
  • Interpretation of evaluation results

(5) A licensed medical provider (i.e., licensed physician, physician's assistant or licensed nurse practitioner):
  • Medical evaluation documenting diagnosis(-es), prognosis, implications

(6) Other professional personnel as indicated (e.g., licensed school psychologist or assistive technology specialist):
  • Direct assessment
  • School record review
  • Review of outside providers' input
  • Observations in multiple settings with peer comparisons
  • Interviews
  • Rating scales
  • Other relevant quantitative/qualitative data

**Components of Evaluation Report**

The following are recommended components of an evaluation. The outline is not meant to be exhaustive, but an example guide to use when writing evaluation results.

• Reason for referral
• Current/presenting concerns
• Previous evaluations, findings, recommendations (e.g., school-based & outside providers)
Section IV: Eligibility Considerations

Evaluation results enable the team to answer the following questions for eligibility:

- Are both prongs of eligibility met?
  - Prong 1: Do the evaluation results support the presence of an educational disability?
    - The team should consider educational disability definitions and criteria referenced in the disability standards (i.e., evaluation procedures).
    - Are there any other factors that may have influenced the student's performance in the evaluation? A student is not eligible for special education services if it is found that the determinant factor for eligibility
is either lack of instruction in reading or math, or limited English proficiency.

- Prong 2: Is there documentation of how the disability adversely affects the student’s educational performance in his/her learning environment?
  - Does the student demonstrate a need for specialized instruction and related services?
- Was the eligibility determination made by an IEP team upon a review of all components of the assessment?
- If there is more than one disability present, what is the most impacting disability that should be listed as the primary disability?

Determination of eligibility is made by the IEP team upon a review of all components of the assessment.

**Specific Eligibility Considerations for Orthopedic Impairment**

A medical diagnosis of a health condition is not sufficient in and of itself to determine eligibility for special education. An orthopedic impairment is an educational disability and follows federal and state criteria as outlined in this guidance document in order to determine eligibility for services. A comprehensive evaluation, which includes all evaluation standards, must occur and the team must review the results of the evaluation to help make eligibility decisions. Pre-referral interventions are not necessarily required to mitigate concerns prior to referral. Teams should consider whether general education interventions and accommodations would sufficiently meet the student’s needs, particularly before determining whether specially designed instruction/related services are needed. Some students with physical disabilities may simply require their teachers to consider universal design for learning (UDL) in the general education setting when finding appropriate teaching methods, materials, or assessment measures. Differentiation of the classroom environment, learning process, and/or learning product to accommodate the student’s fine or gross motor deficits must be considered. Section 504 is a federal law that protects individuals with disabilities and provides an alternate way to support a child with a physical condition who does not require special education services but whose condition substantially impacts the student’s daily functioning through allowable accommodations. More information about Section 504 can be found at [https://www2.ed.gov/about/offices/list/ocr/504faq.html](https://www2.ed.gov/about/offices/list/ocr/504faq.html).

**Section V: Re-evaluation Considerations**

A re-evaluation must be conducted at least every three years or earlier if conditions warrant. Re-evaluations may be requested by any member of the IEP team prior to the triennial due date (e.g., when teams suspect a new disability or when considering a change in eligibility for services). This process involves a review of previous assessments, current academic
performance, and input from a student's parents, teachers, and related service providers which is to be documented on the Re-evaluation Summary Report (RSR). The documented previous assessments should include any assessment results obtained as part of a comprehensive evaluation for eligibility or any other partial evaluation. Teams will review the RSR during an IEP meeting before deciding on and obtaining consent for re-evaluation needs. Therefore, it is advisable for the IEP team to meet at least 60 calendar days prior to the re-evaluation due date. Depending on the child's needs and progress, re-evaluation may not require the administration of tests or other formal measures; however, the IEP team must thoroughly review all relevant data when determining each child's evaluation need.

Some of the reasons for requesting early re-evaluations may include:
- concerns, such as lack of progress in the special education program;
- acquisition by an IEP team member of new information or data;
- review and discussion of the student's continuing need for special education (i.e., goals and objectives have been met and the IEP team is considering the student's exit from his/her special education program); or
- new or additional suspected disabilities (i.e., significant health changes, outside evaluation data, changes in performance leading to additional concerns).

The IEP team may decide an evaluation is needed or not needed in order to determine continued eligibility. All components of The RSR must be reviewed prior to determining the most appropriate decision for re-evaluation. Reasons related to evaluating or not evaluating are listed below.

**NO evaluation is needed:**
- The team determines no additional data and/or assessment is needed. The IEP team decides that the student will continue to be eligible for special education services with his/her currently identified disability/disabilities.
- The team determines no additional data and/or assessment is needed. The IEP team decides that the student will continue to be eligible for special education services in his/her **primary** disability; however, the IEP team determines that the student is no longer identified with his/her secondary disability.
- The team determines no additional data and/or assessment is needed. The student is no longer eligible for special education services.
- (Out of state transfers): The team determines additional data and/or assessment is needed when a student transferred from out of state, because all eligibility requirements did NOT meet current Tennessee state eligibility standards. Therefore, the IEP team decides that the student would be eligible for special education services in Tennessee with their previously out-of-state identified disability/disabilities while a comprehensive evaluation to determine eligibility for Tennessee services is conducted.
**Evaluation** is needed:

- The team determines no additional data and/or assessment is needed for the student's *primary* disability. The IEP team decides that the student will continue to be eligible for special education services in his/her *primary* disability; however, the IEP team determines that the student may have an additional disability; therefore, an evaluation needs to be completed in the suspected disability classification area to determine if the student has a secondary and/or additional disability classification. In this case, the student continues to be eligible for special education services with the currently identified primary disability based on the date of the decision. The eligibility should be updated after the completion of the secondary disability evaluation if the team agrees a secondary disability is present (this should not change the primary disability eligibility date).

- The team determines additional data and/or assessment is needed for program planning purposes only. This is a limited evaluation that is specific to address and gather information for goals or services. This evaluation does not include all assessment components utilized when determining an eligibility NOR can an eligibility be determined from information gathered during program planning. If a change in primary eligibility needs to be considered, a comprehensive evaluation should be conducted.

- The team determines an additional evaluation is needed to determine if this student continues to be eligible for special education services with the currently identified disabilities. A comprehensive is necessary anytime a team is considering a change in the primary disability. Eligibility is not determined until the completion of the evaluation; this would be considered a comprehensive evaluation and all assessment requirements for the eligibility classification in consideration must be assessed.

When a student's eligibility is changed following an evaluation, the student's IEP should be reviewed and updated appropriately.

**Specific Considerations for Orthopedic Impairment Reevaluations**

When a student becomes eligible under the orthopedic impairment category, the following may need to be readdressed when considering whether more information is needed to address how the student's disability is adversely impacting educational disability.

- The student's equipment needs may change over time which may impact access to the educational environment, endurance, mobility, and/or speed.
- The need for assistive technology (AT) should be considered as the child grows. For some conditions, a growth spurt may cause limited flexibility in the hands or fingers (and maybe even contractures) which may warrant an AT evaluation for communication, access, for test taking, etc.
• A young student's seating and positioning plan may be very different as they age and will need to be assessed at re-evaluation. At five years of age, the child may not have needed a seating/positioning system or strategy recommendations, but may require them at a later date.
• Those with degenerative diseases will need to be assessed for maintenance of functional abilities and access, strategies to limit or decrease chronic pain, use of elevators, etc.
• With age and increased weight comes more fatigue and endurance issues, participation restrictions, chronic pain, etc. which all must be taken into consideration on re-evaluation.
• Any new medical information, including current precautions and/or contraindications which may affect school mobility, will need to be considered.
• Academic requirements increase as the child becomes older, so the need for additional accommodations should be considered.
Appendix A: TN Assessment Instrument Selection Form (TnAISF)

This form should be completed for all students screened or referred for a disability evaluation.

Student's Name______________________ School______________________ Date_____/_____/______

The assessment team must consider the strengths and weaknesses of each student, the student's educational history, and the school and home environment. The Tennessee Department of Education (TDOE) does not recommend a single "standard" assessment instrument when conducting evaluations. Instead, members of the assessment team must use all available information about the student, including the factors listed below, in conjunction with professional judgment to determine the most appropriate set of assessment instruments to measure accurately and fairly the student's true ability.

<table>
<thead>
<tr>
<th>CONSIDERATIONS FOR ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>LANGUAGE</td>
</tr>
<tr>
<td>○ Dominant, first-acquired language spoken in the home is other than English</td>
</tr>
<tr>
<td>○ Limited opportunity to acquire depth in English (English not spoken in home, transience due to migrant employment of family, dialectical differences acting as a barrier to learning)</td>
</tr>
<tr>
<td>ECONOMIC</td>
</tr>
<tr>
<td>○ Residence in a depressed economic area and/or homeless</td>
</tr>
<tr>
<td>○ Low family income (qualifies or could qualify for free/reduced lunch)</td>
</tr>
<tr>
<td>○ Necessary employment or home responsibilities interfere with learning</td>
</tr>
<tr>
<td>ACHIEVEMENT</td>
</tr>
<tr>
<td>○ Student peer group devalues academic achievement</td>
</tr>
<tr>
<td>○ Consistently poor grades with little motivation to succeed</td>
</tr>
<tr>
<td>SCHOOL</td>
</tr>
<tr>
<td>○ Irregular attendance (excessive absences during current or most recent grading period)</td>
</tr>
<tr>
<td>○ Attends low-performing school</td>
</tr>
<tr>
<td>○ Transience in elementary school (at least 3 moves)</td>
</tr>
<tr>
<td>○ Limited opportunities for exposure to developmental experiences for which the student may be ready</td>
</tr>
<tr>
<td>ENVIRONMENT</td>
</tr>
<tr>
<td>○ Limited experiences outside the home</td>
</tr>
<tr>
<td>○ Family unable to provide enrichment materials and/or experiences</td>
</tr>
<tr>
<td>○ Geographic isolation</td>
</tr>
<tr>
<td>○ No school-related extra-curricular learning activities in student's area of strength/interest</td>
</tr>
<tr>
<td>OTHER</td>
</tr>
<tr>
<td>○ Disabling condition which adversely affects testing performance (e.g., language or speech impairment, clinically significant focusing difficulties, motor deficits, vision or auditory deficits/sensory disability)</td>
</tr>
<tr>
<td>○ Member of a group that is typically over- or underrepresented in the disability category</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OTHER CONSIDERATIONS FOR ASSESSMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>__ May have problems writing answers due to age, training, language, or fine motor skills</td>
</tr>
<tr>
<td>__ May have attention deficits or focusing/concentration problems</td>
</tr>
<tr>
<td>__ Student's scores may be impacted by assessment ceiling and basal effects</td>
</tr>
<tr>
<td>__ Gifted evaluations: high ability displayed in focused area: ________________________________</td>
</tr>
<tr>
<td>__ Performs poorly on timed tests or is a highly reflective thinker and does not provide quick answers to questions</td>
</tr>
<tr>
<td>__ Is extremely shy or introverted when around strangers or classmates</td>
</tr>
<tr>
<td>__ Entered kindergarten early or was grade skipped _____ year(s) in _____ grade(s)</td>
</tr>
<tr>
<td>__ May have another deficit or disability that interferes with educational performance or assessment</td>
</tr>
</tbody>
</table>

SECTION COMPLETED BY ASSESSMENT PERSONNEL

As is the case with all referrals for intellectual giftedness, assessment instruments should be selected that most accurately measure a student's true ability. However, this is especially true for students who may be significantly impacted by the factors listed above. Determine if the checked items are compelling enough to indicate that this student's abilities may not be accurately measured by traditionally used instruments. Then, record assessment tools and instruments that are appropriate and will be utilized in the assessment of this student.

<table>
<thead>
<tr>
<th>Assessment Category/Measure:</th>
<th>Assessment Category/Measure:</th>
<th>Assessment Category/Measure:</th>
</tr>
</thead>
<tbody>
<tr>
<td>__________________________</td>
<td>__________________________</td>
<td>__________________________</td>
</tr>
</tbody>
</table>

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Appendix: B: Sample Release of Information

<table>
<thead>
<tr>
<th>Student: ____________________________</th>
<th>School: ____________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date of Birth: _____________________</td>
<td>Parent/Guardian: ____________________</td>
</tr>
<tr>
<td>Address: ___________________________</td>
<td>Phone: ______________________________</td>
</tr>
</tbody>
</table>

Your child has been referred for an evaluation for special education services. Additional information is needed to assist in determining the need for special education. This information will be confidential and used only by persons directly involved with the student.

For this evaluation, we are requesting information from the indicated contact person/agency:

Name of contact and/or agency/ practice: __________________________________________________
Address: __________________________________________
Phone Number: __________________________ Fax number: ______________________________
☐ Medical  ☐ Psychological/Behavioral  ☐ Vision/ Hearing  ☐ Other: __________

In order to comply with federal law, your written permission is required so that the school system can receive information from the contact/doctor listed. Please sign on the line below and return to ________________________ at his school. Thank you for your assistance in gathering this information needed for your child’s assessment. If you have any questions regarding this request, please feel free to call (____)______________________ for clarification.

☐ I authorize _____________________________________________ (provider) to disclose protected health information about my child _____________________________ to the ___________________________ school system. The release extends for the period of year or for the following period of time: for __________ to _______.

☐ I do not authorize the above provider to release information about my child to the ____________________________ school system.

______________________________
Parent/ Guardian Signature
Appendix C: Medical Information Form

☐ AUT ☐ EMD ☐ OHI ☐ OI ☐ TBI

PHYSICIAN: This student is being evaluated by ______________________ Schools to determine if additional educational services are needed due to a possible medical condition that might significantly impact school performance. We are considering a possible disability as checked above in one of the following disability categories: autism, emotional disturbance, other health impairment, orthopedic impairment, or traumatic brain injury. The Disability Eligibility Standards for each can be reviewed on the web at http://state.tn.us/education/speced/seassessment.shtml#INITIAL. The information below is a necessary part of the evaluation to help the IEP Team determine whether or not the student requires in-class interventions, direct or related services in special education and/or other services in order to progress in the general curriculum.

Student: ___________________________ Birth Date: _________ School: ___________________________

Parent/ Guardian: ___________________________ Address: ___________________________

Date of Evaluation/Examination: ___________________________

Check below if you have diagnosed the student with any of the following:

☐ Autism Spectrum Disorder – Impressions/information that might help rule out or confirm diagnosis
Describe/Specify: ________________________________________________

☐ Emotional Disturbance – Include and physical conditions ruled out as the primary cause of atypical behavior and psychiatric diagnoses
Describe/Specify: ________________________________________________

☐ Orthopedic Impairment – The impairment will primarily impact (please circle): ☐ mobility ☐ daily living ☐ other: __________________________
Describe/Specify: ________________________________________________

☐ Other Health Impairment: (check all that apply) ☐ ADHD-predominately inattentive ☐ ADHD-predominately Impulsive/ Hyperactive ☐ ADHD-Combined ☐ Other health condition(s): __________________________

Special health care procedures, special diet and/or activity restrictions:

☐ Traumatic Brain Injury – Specify: __________________________

The injury causes the following impairment(s) (please check): ☐ physical ☐ cognitive ☐ psychosocial
☐ other: __________________________

Please Describe: ________________________________________________

General Health History and Current Functioning: __________________________

Diagnosis(es)/etiology: ______________________________________________

Prognosis: ______________________________________________

Medications: ______________________________________________

How does this medical or health condition impact school behavior and learning?

________________________________________________________________________

Recommendation:

Does the student have any other medical condition or disorder that could be causing the educational and/or behavior difficulties? ☐ Yes ☐ No If yes, explain:

________________________________________________________________________

________________________________________________________________________

Physician's Name Printed: _____________________________________________

Address: _____________________________________________

Physician’s signature: ___________________________________________ Date: ___________________________
CONFIDENTIAL PARENT QUESTIONNAIRE
To Be Completed by Parent or Parent Interview

Student Information
Name: ___________________ Form completed by: ___________________ Date: ___/___/_____
Date of birth: ___________ Age: ________

Parents/Legal Guardians (Check all that apply.)
With whom does this child live?
 Both parents  Mother  Father  Stepmother  Stepfather
 Other: _______________________________________________________________________
Parents'/Legal Guardians’ Name(s):
_________________________________________________________________________________
Address: _______________________________________________________________________
Home phone: ___________ Work phone: ___________ Cell phone: ___________
List names/ages/relationships of people at home: _______________________________________
_________________________________________________________________________________

Are there any languages other than English spoken at home?   Yes   No
If yes, what language(s)? _______________ By whom? _______________ How often? _________

Areas of Concern (Check all that apply.)
 Behavioral/emotional  Slow development  Listening
 Immature language usage  Difficulty understanding language  Health/medical
 Slow motor development  Vision problems  Development inconsistent
 Speech difficult to understand   Other: ____________________________________________

Why are you requesting this evaluation? _______________________________________________
_________________________________________________________________________________

Did anyone suggest that you refer your child?   Yes   No
If yes, name and title: ______________________________________________________________
Has a physician, psychologist, speech pathologist or other diagnostic specialist evaluated your
child?   Yes   No
Was a diagnosis determined?   Yes   No  Please explain:
_________________________________________________________________________________

Preschool History (Check all that apply.)
Preschool/daycare programs attended
Name: ___________ Address: ___________ Dates________________
Name: ___________ Address: ___________ Dates________________
List any special services that your child has received (e.g., Head Start, TIPS, TEIS, therapy, etc.)
Type of service: ________ Age: ________ Dates: ________ School/agency: ________
Type of service: ________ Age: ________ Dates: ________ School/agency: ________
If your child has attended a preschool or daycare and problems were discussed with you concerning his/her behavior, explain what was tried and if you think it worked.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Developmental History

Pregnancy and Birth
Which pregnancy was this? □ 1st □ 2nd □ 3rd □ 4th □ Other______ Was it normal? □ Yes □ No
Explain any complications: __________________________
Was your child □ Full term? □ Premature? What was the length of labor? __________
Was the delivery: Spontaneous? □ Yes □ No Induced? □ Yes □ No Caesarian? □ Yes □ No
Birth weight _____ Baby's condition at birth (jaundice, breathing problems, etc.):

__________________________

Motor Development (List approximate ages)

Sat alone ________ Crawled ________ Stood alone ________
Walked independently ________ Fed self with a spoon ________
Toilet trained ________ Bladder ________ Bowel ________

Medical History
List any significant past or present health problems (e.g., serious injury, high temperature or fever, any twitching or convulsions, allergies, asthma, frequent ear infections, etc.).

______________________________________________________________________________
______________________________________________________________________________
List any medications taken on a regular basis.
______________________________________________________________________________
______________________________________________________________________________

Speech and Language (List approximate ages)

__________ Spoke first words that you could understand (other than mama or dada)
__________ Used two-word sentences
__________ Spoke in complete sentences
__________ Does your child communicate primarily using speech?
__________ Does your child communicate primarily using gestures?
__________ Is your child's speech difficult for others to understand?
__________ Does your child have difficulty following directions?
__________ Does your child answer questions appropriately?

Social Development
What opportunities does your child have to play with children of his/her age? ____________
What play activities does your child enjoy? ________________________________

Does s/he play primarily alone?  ☐ Yes ☐ No  
With other children?  ☐ Yes ☐ No

Does s/he enjoy “pretend play”?  ☐ Yes ☐ No

Do you have concerns about your child’s behavior?  ☐ Yes ☐ No  
If yes, please explain.  ________________________________________________

How do you discipline your child? ________________________________

________________________

Thank you for providing the above developmental information on your child. Please return
to ___________________________. If you have any questions, please feel free to contact
__________________________ at __________________________.
Appendix E: Adaptive Functioning Skills in School (5 to 10-year-old students)

Child's Name: ___________________________ Date: ______________

Teacher: ________________________________

Please check any item below if it is of concern (✓). Please mark a (+) if this is a strength for your child. Leave blank if it is an average skill.

**Communication**
- Speaks in full sentences
- Follows instructions involving an object and an action (e.g., Go get the apples from the table)
- Listens to a story for five minutes
- Vocabulary seems appropriate for age
- Able to engage in back-and-forth conversation
- Length and content of verbal interactions seem age appropriate
- Asks simple questions
- Written communication skills are age appropriate

**Self-Care**
- Takes care of personal needs (e.g., toileting and washing hands)
- Ties shoes
- Maintains neat and clean personal appearance

**Social Skills**
- Uses names of others
- Plays with siblings and/or same-age peers
- Has one or more close friends
- Enjoy the company of other children
- Is not overly dependent on adults
- Shows sympathy for others when they are sad or upset
- Uses words to express own emotions
- Chooses not to say embarrassing things in public

**Home/School Living**
- Shows respect for others' belongings
- Picks up toys/belongings when asked
- Changes easily from one activity to another
- Keeps track of personal belongings
- Uses acceptable table manners

**Community Use**
- Demonstrates understanding of the function of money
- States value of coins
- Obeys people in authority
- Understands the function of a clock
- States current day of the week when asked

**Self-Direction**
- Follows daily routines
- Completes tasks in a reasonable amount of time
- Controls anger when denied his/her own way
- Apologizes when appropriate
- Keeps working on a task even when it is difficult
- Asks for help when needed

**Health and Safety**
- Respects personal space of others
- Follows safety rules when playing outside
- Shows caution around dangerous activities
- Tells adult when injured or sick

**Play and Leisure**
- Plays with toys and other objects alone or with others
- Shows interest in the activity of others
- Follows rules in a game without reminders
- Tries a new activity to learn something new
- Invites peers to join activities
- Shares toys and possessions when asked
- Plays cooperatively with others
- Uses things for make-believe activities

**Physical Development**
- Walks independently
- Picks up small objects with hand
- Kicks a ball
- Runs smoothly with changes in speed and direction
- Walks up and down stairs
- Draws shapes
**Functional Academics:** The student performs at the following levels.

Reading:
___ Has average reading skills (at grade level)
___ Is below peers (one to two grade levels below)
___ Is somewhat below peers (two to three grade levels below)
___ Is significantly below peers (three or more grade levels below)

Math:
___ Has average math skills (at grade level)
___ Is below peers (one to two grade levels below)
___ Is somewhat below peers (two to three grade levels below)
___ Is significantly below peers (three or more grade levels below)

Writing:
___ Has average writing skills (at grade level)
___ Is below peers (one to two grade levels below)
___ Is somewhat below peers (two to three grade levels below)
___ Is significantly below peers (three or more grade levels below)
Appendix F: Adaptive Functioning at School (11 years and older)

Student Name: _______________________________  Date: ________________

Teacher: _________________________________

Please check any item below if it is of concern (✓). Please mark a (+) if this is a strength for the student. Leave blank if it is an average skill.

**Communication:**
- __Speaks in full sentences
- __Stays on topic in conversations
- __Describes a realistic long-range goal and how s/he will accomplish it
- __Able to relate a story or event in order
- __Vocabulary seems age-appropriate
- __Verbal communication skills are age appropriate
- __Written communication skills are age appropriate
- __Listening comprehension skills are age appropriate

**Self-Care:**
- __Takes care of personal hygiene, including bathing, brushing teeth, combing hair

**Social Skills:**
- __Meets with friends regularly
- __Has one or more close friend(s)
- __Enjoys the company of other children
- __Chooses not to say embarrassing things in public
- __Keeps comfortable distance when talking to others

**Community Use:**
- __Tells time accurately
- __Uses a calendar

**Self-Direction:**
- __Folllows through with tasks
- __Able to complete homework independently
- __Able to complete school work in class independently
- __Keeps working on a task even when difficult
- __Asks for help when needed
- __Completes tasks in a reasonable amount of time
- __Controls anger when denied his/her own way
- __Apologizes when appropriate
- __Able to organize and plan tasks

**Play and Leisure:**
- __shows interest in the activity of peers
- __Able to join groups
- __Plays simple games that require keeping scores
- __Participates in extracurricular activity (e.g., sports, church-related, music)

**Functional Academics:** The student performs at the following levels.

**Reading:**
- __Has average reading skills (at grade level)
- __Is below peers (one to two grade levels below)
- __Is somewhat below peers (two to three grade levels below)
- __Is significantly below peers (three or more grade levels below)

**Math:**
- __Has average math skills (at grade level)
- __Is below peers (one to two grade levels below)
- __Is somewhat below peers (two to three grade levels below)
- __Is significantly below peers (three or more grade levels below)

**Writing:**
- __Has average writing skills (at grade level)
- __Is below peers (one to two grade levels below)
- __Is somewhat below peers (two to three grade levels below)
- __Is significantly below peers (three or more grade levels below)
Appendix G: Adaptive Functioning Skills in the Home (5 to 10-year-old students)

Child's Name: ___________________________ Date: ______________

Parent: _________________________________

Please check any item below if it is of concern (√). Please mark a (+) if this is a strength for your child. Leave blank if it is an average skill.

**Communication**
___ Speaks in full sentences
___ Follows instructions involving an object and an action (e.g., Go get the apples from the table)
___ Listens to a story for five minutes
___ Vocabulary seems appropriate for age
___ Able to engage in back-and-forth conversation
___ Length and content of verbal interactions seem age-appropriate
___ Asks simple questions

**Self-Care**
___ Dresses himself/herself, including fasteners
___ Takes care of personal needs (ex. toileting and washing hands)
___ Ties shoes
___ Wears appropriate clothing for weather conditions
___ Personal appearance is neat and clean
___ Buckles own seat belt

**Social Skills**
___ Uses names of others
___ Plays with siblings and/or same-age peers
___ Has one or more close friend(s)
___ Enjoys the company of other children
___ Not overly dependent on adults
___ Shows sympathy for others when they are sad or upset
___ Uses words to express own emotions
___ Chooses not to say embarrassing things in public

**Home/School Living**
___ Shows respect for others' belongings
___ Picks up toys/belongings when asked
___ Changes easily from one activity to another
___ Keeps track of personal belongings
___ Uses acceptable table manners

**Community Use**
___ Demonstrates understanding of the function of money
___ States value of coins
___ Obey people in authority
___ Understands the function of a clock
___ States current day of the week when asked

**Self-Direction**
___ Follows daily routines
___ Completes tasks in a reasonable amount of time
___ Controls anger when denied his/her own way
___ Apologizes when appropriate
___ Keeps working on a task even when it is difficult
___ Asks for help when needed

**Health and Safety**
___ Respects personal space of others
___ Follows safety rules when playing outside
___ Shows caution around dangerous activities
___ Tells adult when injured or sick

**Play and Leisure**
___ Plays with toys and other objects alone or with others
___ Shows interest in the activity of others
___ Follows rules in a game without reminders
___ Tries a new activity to learn something new
___ Invites peers to join activities
___ Shares toys and possessions when asked
___ Plays cooperatively with others
___ Uses things for make-believe activities

**Physical Development**
___ Walks independently
___ Picks up small objects with hand
___ Kicks a ball
___ Runs smoothly with changes in speed and direction
___ Walks up and down stairs
___ Draws shapes
Appendix H: Adaptive Skill-Based Checklist for Home (11 years and older)

Student Name: ________________________________  Date: ______________

Parent: ________________________________

Please check any item below if it is of concern (✓). Please mark a (+) if this is a strength for the student. Leave blank if it is an average skill.

**Communication:**
- [ ] Speaks in full sentences
- [ ] Stays on topic in conversations
- [ ] Describes a realistic long-range goal and how s/he will accomplish it
- [ ] Able to relate a story or event in order
- [ ] Vocabulary seems age-appropriate

**Self-Care:**
- [ ] Independently gets out of bed and dressed on time
- [ ] Takes care of personal hygiene, including bathing, brushing teeth, combing hair

**Daily Living:**
- [ ] Prepares simple foods
- [ ] Helps with simple household chores
- [ ] Uses simple appliances (toaster, can opener)
- [ ] Uses a microwave
- [ ] Able to make his/her bed
- [ ] Able to sort, wash, and fold clothes
- [ ] Makes phone calls to others

**Social Skills:**
- [ ] Meets with friends regularly
- [ ] Has one or more close friend(s)
- [ ] Enjoys the company of other children
- [ ] Chooses not to say embarrassing things in public
- [ ] Keeps comfortable distance when talking to others
- [ ] Participates in extracurricular activity (e.g., sports, church-related, music)

**Community Use:**
- [ ] Orders own meal at a restaurant
- [ ] Pays for purchases with money
- [ ] Carries money safely
- [ ] Understands different denomination of bills
- [ ] Tells time accurately
- [ ] Has a part-time job (e.g., babysitting, mowing lawns)
- [ ] Uses a calendar
- [ ] Has a driver's license

**Self-Direction:**
- [ ] Follows through with tasks
- [ ] Able to complete homework independently
- [ ] Keeps working on a task even when difficult
- [ ] Asks for help when needed
- [ ] Completes tasks in a reasonable amount of time
- [ ] Controls anger when denied his/her own way
- [ ] Apologizes when appropriate

**Health and Safety:**
- [ ] Respects personal space of others
- [ ] Follows safety rules when playing outside
- [ ] Shows caution around dangerous activities
- [ ] Knows what to do in case of illness or injury
- [ ] Takes necessary medication as prescribed

**Play and Leisure:**
- [ ] Shows interest in the activity of peers
- [ ] Able to join groups
# Appendix I: Assessment Documentation Form

<table>
<thead>
<tr>
<th>School District_________________</th>
<th>School____________________</th>
<th>Grade___</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student_______________________</td>
<td>Date of Birth_ /<strong>/</strong>______</td>
<td>Age____</td>
</tr>
</tbody>
</table>

## 1. Definition

- **Orthopedic Impairment** means a severe orthopedic impairment that adversely affects a child’s educational performance. The term includes, but is not limited to, impairments caused by congenital anomaly (e.g., club foot, absence of some member), impairments caused by disease (e.g., poliomyelitis, bone tuberculosis), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns that cause contractures).

- **Yes** ☑  
- **No** ☐

## 2. Evaluation Procedures

- **medical evaluation of child's Orthopedic Impairment by licensed physician**
  - **Yes** ☑  
  - **No** ☐
  - **name of physician:** ________________________________________________
  - **date of report:** ___________________________________________________

- **individually administered motor evaluation to address mobility and activities of daily living**
  - **Yes** ☑  
  - **No** ☐

- **adaptive measure**
  - **Yes** ☑  
  - **No** ☐

- **educational evaluation (may include individual and/or group educational achievement, classroom observations, criterion-referenced tests, curriculum-based assessments, review of child’s existing records, attendance, health)**
  - **Yes** ☑  
  - **No** ☐

- **documentation (observation and/or assessment) of how Orthopedic Impairment adversely impacts the child’s educational performance in his/her learning environment**
  - **Yes** ☑  
  - **No** ☐

---

**Signature of Assessment Team Member**  
**Role**  
**Date**  
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**Signature of Assessment Team Member**  
**Role**  
**Date**  
---

**Signature of Assessment Team Member**  
**Role**  
**Date**  
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**Signature of Assessment Team Member**  
**Role**  
**Date**

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Orthopedic Impairment Assessment Documentation