**Evaluation Requirement Notes**

Case Manager:

Student:

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| **Task:** | **Check In:** | **Complete When:** | **Done?** | **Notes** |
| Schedule Evaluation | IEP Direct: Contact Log | There is a note in the contact log indicating that the evaluation has been scheduled. |  |  |
| Report Checklist Uploaded | IEP Direct: Document Repository | This may be uploaded in combination with the written evaluation (below). |  |  |
| Signed Report Uploaded | IEP Direct: Document Repository | This may be uploaded with the evaluation checklist (above). |  |  |
| Report contains all required information | Read the report and compare to the checklist | All required components are included in report, and report has no significant errors. |  |  |
| Evaluations/Reports | IEP Direct: Reports/Assessments | The evaluator has listed the evaluation in this section with the date, the evaluator, and a summary of the evaluation. |  |  |
| Standardized Test Results | IEP Direct: Reports/Assessments | The evaluator has listed the evaluation in this section with the date, the test, the standard score(s), and the evaluator. |  |  |
| Follow Up To Do Tasks | IEP Direct: Schedule Tasks -> Follow Up To Do Tasks | If there are tasks listed here, the evaluator has marked her task complete and indicated the date completed. If there are no tasks listed here, nothing needs to be done. |  |  |
| 1 Copy to Teachers with Protocol |  | Can be scanned or given in person |  |  |
| 1 Copy to Parent |  | If the teachers are mailing the report, this is complete when the report is given to the teachers. If the evaluator is mailing the report, there must be a note in the IEP Direct Contact Log. |  |  |