

Section Four: Review of Existing Evaluation Data (REED) Process and Form During Initial Evaluations and Reevaluations

Although eligibility determination teams (EDTs) frequently associate the review of existing evaluation data (REED) process with reevaluations, the REED process is an integral part of **all** evaluations for potential eligibility for special education and related services. The REED process may look different during initial evaluations and reevaluations, but teams should review existing evaluation data throughout the entire evaluation process, regardless of the type of evaluation being conducted.

According to New Mexico Administrative Code (NMAC), “the initial evaluation (if appropriate) and any reevaluations must begin with a **review of existing information** by a group that includes the parents, the other members of a child’s Individualized Education Program (IEP) team and other qualified professionals, as appropriate, to determine what further evaluations and information are needed to address the question in 34 CFR Sec. 300.305(a)(2).” NMAC 6.31.2.10 D(2)d.ii

In addition to the REED process, EDTs are reminded that initial evaluations must also follow the guidelines presented in this manual (NM TEAM, 2021). When reviewing data, EDTs should determine if they have adequate data as outlined for each specific eligibility category under *Highly Recommended* and *Potential Additional* components of an initial evaluation. Following the REED process, the evaluation/reevaluation should be completed by gathering and analyzing additional data, as necessary, to fulfill these components.

Part of the REED process is evaluating the quality of the existing data (i.e., information) available to determine if the EDT has enough information to (a) determine if the child is or continues to be a child with a disability **and** (b) determine the educational needs of the child (including need for special education and related services, accommodations or modifications to the special education program, etc.). The REED process (and the evaluations/reevaluations they are part of) is not solely for eligibility determination decisions, but also to ensure that the child is receiving an appropriate education with appropriate supports.

“Existing evaluation data” includes all information on a child, including formal assessment data, informal evaluation data (e.g., work samples, curriculum-based measures, etc.), and extant information (e.g., observations, interviews, and historical data). According to Individuals with Disabilities Education Act (IDEA, 2004), the REED process involves reviewing existing evaluation data on the child, including:

- Evaluations and information provided by the parents of the child, which may include Part C information when transferring to Part B;
- Current classroom-based, local, or state assessments, and classroom-based observations; and

- Observations by teachers and related service provider(s).

It is essential for teams to understand that the REED process is active. At the most basic level, the purpose of the REED process is to analyze the child's strengths and concerns within the context of:

- "What information do we have?" and
- "What information do we need?"

The EDT should use this information, along with input from the child's parents, to identify what additional data, if any, are needed to determine:

1. Whether a child has a disability (for initial evaluations) or continues to have a disability (for reevaluations);
2. The educational needs of the child;
3. The present levels of academic achievement, functional performance, and related developmental needs of the child;
4. Whether the child continues to need special education and related services; and
5. Whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable annual goals set out in the IEP and to participate, as appropriate, in the general education curriculum.

At a Glance: The Role of the REED Process

Initial Evaluations: The REED process is not legally required for initial evaluations and does not need to be formally documented but provides the EDT with valuable information needed to plan the child's evaluation. Regardless of whether or not the REED process is formally completed, all existing data on the child (including SAT documentation, outside evaluations, etc.) must be considered as part of every evaluation. The EDT must refer to the NM TEAM *Highly Recommended* and *Potential Additional* components of an initial evaluation for the specific eligibility categories under consideration to ensure that the evaluation is comprehensive and complete.

Reevaluations: The REED process must be documented (see form in this section for an example) as a record of the data that were reviewed. This process guides EDTs in determining what, if any, additional data (from formal assessments, informal assessments, and/or observations/interviews/extant information) need to be gathered as part of the child's reevaluation.

Out-of-State Transfer Student: In NM, **all children who transfer from out of state are considered initial evaluations** because EDTs must make an eligibility determination based on New Mexico requirements. Every state has slightly different requirements related to determining if a child has a disability, so it is essential that EDTs examine the child's data within the context of NM requirements. For example, not all states use the eligibility category of Developmental Delay and states have varying definitions of Specific Learning Disability. New evaluation data may **not** need to be gathered and formal assessments may **not** need to be administered, but it is always considered an initial evaluation. The REED process should be used for these children to determine if the EDT has enough existing data to make an eligibility determination decision

or, if not, what additional data are needed. If the EDT determines that new data are needed, the 60-day timeline from consent to the completion of the evaluation (not EDT meeting) applies. **Until the EDT makes its eligibility determination decision according to NM guidelines, the Local Education Agency (LEA) must continue to provide comparable services to the student.**

Within-State Transfer Student: Children who transfer between LEAs within NM have already been found eligible for special education and related services based on New Mexico requirements. These children do not need to receive a new evaluation or eligibility determination decision upon enrolling in the new LEA. LEAs are encouraged to closely review the information provided by the previous school to ensure they are compliant with all requirements, such as three-year reevaluation dates, appropriate eligibility(ies), services, etc.

Part C to B Transition Students: In NM, EDTs are strongly encouraged to use the REED process to plan the child's evaluation even though this is an initial evaluation for eligibility for special education and related services under Part B of IDEA (for children from 3 to 21 years of age). This process will assist EDTs in identifying existing data from parents and Part C providers (early intervention programs for children from birth to age 3 years) to identify what, if any, additional data are needed to make an eligibility determination under Part B of IDEA. It is important for EDTs to recognize that the eligibility requirements are different under Part B and Part C of IDEA.

Practical Considerations for the REED Process and Form

The REED process is the first step in reevaluations (and initial evaluations, when appropriate). It is an active process and guides EDTs in planning evaluations. This process can be completed without a meeting, such as through a "walking document," with participation by team members via telephone, through electronic collaboration, etc. A "walking document" means that there does not need to be a meeting to gather data, complete the document, or obtain signatures. In other words, there is no requirement that there be a formal meeting to initiate or complete the REED process. Signatures on the REED form indicate meaningful participation in contributing information to the document and making decisions regarding the need for additional information, but do not represent attendance at a meeting.

It is important that teams critically analyze the data collected during the REED process. For instance, in many cases the SAT information will likely not replace data that can be obtained via formal standardized assessments and other evaluation tools that provide the data necessary for EDTs to make eligibility determination decisions and develop an appropriate educational program. In addition, formal testing is often not a necessary part of reevaluations because there may be adequate existing information to determine continued eligibility and design an appropriate educational program for the child.

An integral part of the REED process is documenting the explanation for decisions that are made. The REED form provided in this manual can be used to document why existing evaluation data are sufficient to answer the questions or what questions are unanswered and require additional data gathering.

The REED form provided in the NM TEAM is formatted to encourage meaningful collaboration between members to triangulate data across data sources and individuals. Formal assessment information, informal evaluation data, and extant information (e.g., interviews, observations, child's background information, etc.) should be integrated and presented in an organized, cohesive way (e.g., chronologically, by domain, etc.). Each section of this form should reflect input from the child's parents, the child (as appropriate), teachers (general education and special education), related service providers (if applicable), and outside agencies (if applicable).

All members of the EDT, including the parent, general education teachers, special education teachers (if any), related service providers (if any), and other evaluators should have an active role in contributing to the REED process. All team members should look at the whole child during the REED process and provide input across domains that provide information about the interactions between the child's strengths and needs. **Team members should not be limited to reporting only formal testing data or contributing only to specific sections of the REED form.**

This form provides an opportunity to document existing data (information) about the child in the areas of *Background Information; Communication; Physical; Social, Emotional, Behavioral; Cognitive; Functional Performance and Adaptive Behavior; and Academic Achievement*. In each of these areas, the team should consider what is known about the child and the need for additional data by asking "Based on existing data, including concerns raised by teachers and/or parents, does the child seem to...":

- Background Information:
 - have any recent (or relatively recent) changes to home life, school context, medical status, or community context that need to be more closely examined?
 - have experienced any significant life events (personal, familial, or societal) that need to be better understood?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to background factors (if so, what are those difficulties and how are they related to background factors)?

- Communication Factors:
 - know more than one language?
 - have difficulty understanding what is said to him/her (receptive language)?
 - have difficulty expressing thoughts (expressive language)?
 - have difficulty with speech, including speaking clearly (articulation), vocal quality/nasality (voice), and/or stuttering (fluency)?
 - have difficulty communicating socially with others using verbal and/or non-verbal means (pragmatics)?
 - have difficulty verbally communicating or is nonverbal?
 - have attention difficulties that may be related to communication difficulties (e.g., "tuning out" because of poor comprehension, "acting out" because of difficulty expressing himself/herself)?

- have assistive technology needs for communication (including low-tech strategies, curriculum aids, electronic devices, etc.)?
 - have other communication factors that may be impacting educational performance?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to communication factors (if so, what are those difficulties and how are they related to communication factors)?
- Physical Factors:
 - have difficulty with fine motor skills compared to other children of a similar age (e.g., difficulty opening food containers, managing clothing, unzipping backpack)?
 - have difficulty with gross motor skills compared to other children of a similar age (e.g., falls down frequently, difficulty sitting in a chair, difficulty walking on uneven surfaces, difficulty using playground equipment)?
 - have difficulty with sensory processing skills compared to other children of a similar age (e.g., strong emotional responses to sounds, doesn't notice when hurt, constantly moving or banging into things to get more input)?
 - have medical or health problems that impact educational performance?
 - have hearing concerns?
 - have vision concerns?
 - have attention difficulties that may be related to physical factors (e.g., medical conditions, sensory processing differences, difficulty sitting in a chair because of balance or strength)?
 - have assistive technology needs related to physical factors (including low-tech strategies, curriculum aids, electronic devices, etc.)?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to physical factors (if so, what are those difficulties and how are they related to physical factors)?
- Social, Emotional, and Behavioral Factors:
 - have difficulty getting along with others at school and at home?
 - demonstrate behaviors in the school setting that are impeding the learning of self and/or others?
 - demonstrate behaviors in the school setting that are impeding participation in school activities?
 - have difficulty with social-emotional behaviors, including social skills, interpersonal interactions, and/or coping skills?
 - have difficulty with self-concept, emotional regulation, stress response, and/or overall satisfaction to the extent that this is impacting learning?
 - have attention difficulties that may be related to social, emotional, and/or behavioral factors (e.g., poor attention that may be related to trauma, impulsivity that may be due to emotional factors, difficulty with peer relationships because of attention difficulties)?

- have behaviors that the EDT doesn't completely understand and may require more specific interventions (e.g., understanding what is causing the behavior and how to support behavior change, etc.; may be answered through the EDT conducting a functional behavior assessment)?
 - have assistive technology needs for social, emotional, and behavioral factors (including low-tech strategies, curriculum aids, electronic devices, etc.)?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to social, emotional, and behavioral factors (if so, what are those difficulties and how are they related to social, emotional, and behavioral factors)?
- Cognitive Factors:
 - have differences with how he/she thinks, reasons, and/or solves problems compared to other children of a similar age (i.e., cognitive functioning)?
 - have differences with how he/she understands and processes information (e.g., visual spatial processing, language processing, working memory, long-term storage and retrieval, fluid reasoning, processing speed, phonological awareness, attention, orthographic processing, executive functions)?
 - have attention difficulties that may be related to cognitive factors (e.g., "tuning out" because of difficulty processing information, "acting out" because of difficulty remembering information, impulsivity because of poor executive functioning)?
 - have assistive technology needs for cognitive factors (including low-tech strategies, curriculum aids, electronic devices, etc.)?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to cognitive factors (if so, what are those difficulties and how are they related to cognitive factors)?
- Functional Performance and Adaptive Behavior Factors:
 - have difficulties in one or more functional areas (e.g., organization, assignment completion, self-advocacy, initiation, moving through the school environment, using lockers, following schedules, transitioning between and within activities, study skills, etc.)?
 - have difficulty with adaptive behavior (i.e., taking care of himself/herself at home and at school, such as toileting, managing belongings, mealtimes, dressing, money management, time, etc.)?
 - need support with transition planning for life after high school?
 - have attention difficulties that may be related to functional and/or adaptive behaviors (e.g., attention difficulties that make it difficult to move within the school setting; disorganization that make it difficult to pay attention to academic tasks)?
 - have assistive technology needs for functional performance and/or adaptive behavior (including low-tech strategies, curriculum aids, electronic devices, etc.)?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to functional performance and/or adaptive behavior factors (if

so, what are those difficulties and how are they related to functional performance and/or adaptive behavior factors)?

- Academic Achievement Factors:
 - have difficulty with reading (e.g., pre-literacy skills, beginning reading skills, reading fluency, reading comprehension, etc.)?
 - have difficulty with math (e.g., early math skills like numbers, shapes, sorting, comparing, colors; counting; 1:1 correspondence; math facts; word problems; etc.)?
 - have difficulty writing/typing (e.g., ability to copy pre-writing shapes and letters (if child can recognize letters), spelling that isn't about the same level as reading skills, difficulty organizing thoughts through writing/typing, etc.)?
 - have difficulty following instructions, retelling stories, etc., because he/she may not understand what people say to them?
 - have difficulty communicating their thoughts or ideas verbally, explain their thinking, problem solve verbally, compare/contrast ideas, etc.?
 - have attention difficulties that may be related to academic achievement (e.g., "acting out" to mask inability to do the work, "shutting down" because academic tasks are difficult, inattentive behaviors that make it more difficult to learn)?
 - have educational performance difficulties (e.g., academic or functional difficulties) that may be related to academic achievement factors (if so, what are those difficulties and how are they related to academic achievement factors)?

The REED process is intended to review what is already known about the child and should culminate with a synthesis and summary of the information. It is not intended to simply "copy and paste" information from previous evaluations, but to integrate all the historical information on the child to provide a clear, concise description of the child based on these existing data sources.

At the conclusion of the REED process, the team must decide that either (a) no additional data are needed or (b) additional data are needed to complete the evaluation or reevaluation. EDTs should remember that "data" include a variety of sources, including formal assessment, informal assessment, and interview/observation/extant information.

No Additional Data are Needed. If the team decides that additional data are **not** necessary

1. to determine continue eligibility for special education and related services (i.e., to determine initial or continued presence of a disability (prong 1) and need for special education and related services (prong 2)) **and/or**
2. to develop an appropriate educational program (including accommodations or modifications to the special education and related services),

the EDT uses the data obtained during the REED process to document eligibility. If the EDT determines that child continues to be eligible for special education and related services, the IEP team uses information gathered during the REED process to develop an appropriate IEP for the child and ensures the data are reflected in the present levels of academic achievement and

functional performance in the IEP. **In this situation, the documented REED process is considered the initial evaluation/reevaluation and a separate written evaluation report is not necessary. The EDT would then complete the appropriate eligibility determination worksheet for each eligibility category under consideration to document the decision of the EDT.**

Through Prior Written Notice (PWN), the EDT should notify the child's parents of: (a) the determination that no additional data are needed and the reasons for the decision; and (b) the right of the parents to request an assessment to determine whether the child is or continues to be a child with a disability and to determine the child's educational needs. The NM TEAM REED Documentation Form includes language to document this parental notification and can be used in conjunction with the LEA's PWN provided to parents.

Additional Data are Needed. Based on the REED process, the team may determine that additional evaluation data are needed:

1. to determine continue eligibility for special education and related services (i.e., to determine initial or continued presence of a disability (prong 1) and need for special education and related services (prong 2)) **and/or**
2. to develop an appropriate educational program (including accommodations or modifications to the special education and related services).

This new data may include formal assessment data, informal assessment data, and/or observations/interviews/extant information. It is important for EDTs to remember that "additional data" includes all data sources, not only standardized assessment data.

If the team requires additional data to determine new or continued eligibility, they must conduct the evaluation according to IDEA (2004) and follow recommended guidance in NM TEAM (2021). As with all evaluations, the LEA must provide the parent/guardian with PWN and secure written parental consent.

After Completing the REED Process

Once the REED process is completed and, if needed, additional data are gathered, the EDT must document whether the child is or continues to be eligible for special education and related services under one or more IDEA (2004) eligibility category. The eligibility determination and continued need for special education is documented on the appropriate Reevaluation Eligibility Determination form (or the appropriate Initial Eligibility Determination form) and through Prior Written Notice. The evaluation data analyzed (and gathered, if needed) are integrated into the child's IEP that will be developed following the EDT meeting where eligibility for special education and related services is determined and documented.

The new reevaluation date will be three years from this evaluation completion date, based on the following guidance:

- If no additional data were needed, the date of the eligibility determination decision (i.e., the EDT meeting date) is the evaluation completion date.

- If additional data were needed, then the date that the comprehensive evaluation was completed (i.e., last piece of data were collected) is the evaluation completion date.

Key Points and Timelines:

- The 60-day timeline applies to evaluations to determine initial eligibility for special education and related services (aka, Initial Evaluations) only. This timeline starts when informed parental consent is obtained and stops when the comprehensive evaluation is completed (i.e., last piece of data is collected).
- The 60-day timeline does **not** apply to any evaluation subsequent to the initial evaluation, which is the first complete evaluation of a child to determine eligibility for special education and related services. For example, it does not apply to reevaluations or to evaluations that are requested by a child's IEP team to determine need for specific additional services after the child's initial eligibility has been determined (e.g., related services).
- Reevaluations must be completed at least once every three years and no more than once a year unless the school and parent agree.
 - The reevaluation is considered complete when the last piece of data is collected. If no additional data are gathered during the reevaluation process, the reevaluation is considered complete on the date of the EDT meeting.
 - Reevaluations are for eligibility for special education and related services as a whole, not for need for individual services. In other words, services providers DO NOT have different "reevaluation dates" based on when their services were added to a child's IEP.
- Although there is no specific legal timeline for the time frame between evaluation completion and EDT meeting, EDTs should plan to have EDT meetings in a timely manner to prevent undue delay of appropriate services to a child.
- IEP teams are required to hold an IEP meeting within 30 calendar days of an eligibility determination decision if a child is eligible for special education and related services. This timeline applies for eligibility determination decisions at the time of initial evaluation and does not apply to subsequent reevaluations.
- LEAs should understand the relationship between the REED process, reevaluations, eligibility determination decisions, and IEP development:
 - All reevaluations must begin with the REED process (initial evaluations may begin with this process, as well)
 - The purpose of reevaluations is to (a) determine continued eligibility for special education and related services **and** (b) develop an appropriate educational program for a child. A reevaluation is not complete without adequate data to meet both of those purposes.
 - Every initial evaluation and reevaluation **must** be followed by an EDT meeting to document continued eligibility or discontinuation of special education and related services (i.e., completion of eligibility determination worksheets).

- Every EDT meeting must be followed by an IEP meeting (if the child is eligible for special education and related services). This IEP should reflect the current information provided through the REED process and evaluation/reevaluation.
 - EDT members should be encouraged to consider the whole child and contribute across domains rather than assigning a section to each member. For example, speech-language pathologists will likely have information related to the child's cognitive abilities, functional skills, and assistive technology needs, not simply the child's communication skills.
-