



Guidelines for Comprehensive Assessment

**Department of Education
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Table of Contents

Overview of Comprehensive Assessment	1
Guidelines for Comprehensive Assessment.....	1
Service Delivery Team	1
The Lead Assessor and Comprehensive Assessment Team	2
Initiating Comprehensive Assessment	3
Components of a Comprehensive Assessment.....	4
Assessment and Qualifications	5
Validity and Reliability Considerations.....	6
Interpreting Comprehensive Assessment Data	7
Comprehensive Assessment Reports	8
Confidentiality.....	9
Presenting the Comprehensive Assessment Findings	10
Comprehensive Assessment Time Frame and Waitlists	11
Appendices	
Appendix A: Comprehensive Assessment Report Template	13
Appendix B: Comprehensive Assessment Summary Report for Teachers.....	15
Appendix C: Vision and Hearing	16
Appendix D: File Review	21

Overview of Comprehensive Assessment

Comprehensive assessment is a multimethod assessment approach that involves educators with specialized training in assessment, collecting and analyzing data specific to a student's learning profile. The purpose of comprehensive assessment is to answer the referral question posed by the Service Delivery Team. The findings inform instruction, intervention and individualized programming. It is beyond what formative assessment provides. Comprehensive assessment can be initiated when a student is transitioning into kindergarten until graduating from or leaving the K-12 education system.

A comprehensive assessment will:

- 1. Answer the referral question in a valid and reliable manner.**
 - The referral question identifies the reason for the comprehensive assessment. The question is developed by the service delivery team in consultation with educators working with the student.
- 2. Increase understanding of the student's learning profile to inform programming decisions.**
 - Comprehensive assessment provides additional information regarding the student's learning profile. This may include the identification of a diagnosis. Program planning teams, teaching and learning teams and service delivery teams consider this information when making programming decisions.
- 3. Identify if the student may benefit from special education programming and services based on their learning profile.**
 - Comprehensive assessment findings will be used to inform teaching and learning. A comprehensive assessment may indicate that a student would benefit from special education programming and services.

Guidelines for Comprehensive Assessment

Service Delivery Team

1. When the service delivery team determines a comprehensive assessment is required, the team will:
 - a. formulate a referral question informed by data;
 - b. identify the lead assessor;
 - c. select additional members of the comprehensive assessment team; and

- d. ensure a teacher informs the parent/guardian that:
 - i. a comprehensive assessment has been recommended; and
 - ii. the lead assessor will schedule a meeting to discuss the comprehensive assessment process.

The Lead Assessor and Comprehensive Assessment Team

1. A comprehensive assessment team will have a lead assessor. The lead assessor can be a:
 - a. educational psychologist;
 - b. guidance counsellor;
 - c. speech-language pathologist;
 - d. teacher for students who are blind or visually impaired (BVI); or
 - e. teacher for students who are deaf or hard of hearing (DHH).
2. The lead assessor is selected based on the information required to answer the referral question and the professional training and qualifications of the assessor.
3. A collaborative approach to comprehensive assessment is recommended. School-based and/or district assessors working with the lead assessor can support the comprehensive assessment process in a variety of capacities, including:
 - a. consultative support;
 - b. conducting student observations;
 - c. completing file reviews;
 - d. interviewing teachers, parents/guardians and students; and
 - e. administering standardized assessment tools.
4. Comprehensive assessment team members may include a:
 - a. educational psychologist;
 - b. guidance counsellor;
 - c. English as an Additional Language teacher (EAL);
 - d. Literacy Enrichment and Academic Readiness for Newcomers (LEARN) teacher;
 - e. instructional resource teacher;
 - f. program itinerant for autism spectrum disorder
 - g. speech-language pathologist;
 - h. teacher for students who are blind or visually impaired; and
 - i. teacher for students who are deaf or hard of hearing.
5. The responsibilities assigned to comprehensive team members will be based on their professional training and qualifications.

6. The service delivery team may change the composition of the comprehensive assessment team to include additional members as required.
7. The lead assessor may change during the assessment process in response to modifications to the referral question. This decision is made by the Service Delivery Team after consultation with the lead assessor.
8. A comprehensive assessment team may consult personnel with the Atlantic Provinces Special Education Authority (APSEA) regarding BVI and DHH data.
9. The Comprehensive Assessment Team will consult with a specialist or educator knowledgeable about issues related to cross-cultural competence or experience in the culture of origin when assessing students with culturally and/or linguistically diverse (CLD) or Indigenous backgrounds.

Note: When assessing students with culturally and linguistically diverse backgrounds, the Comprehensive Assessment Team will refer to the Department of Education: *Special Considerations for the Comprehensive Assessment of Students with CLD Backgrounds*.

Initiating Comprehensive Assessment

Note: Public health nurses are no longer responsible for vision and hearing screening within the public school system. See Appendix C for guidance regarding vision and hearing for comprehensive assessment.

1. The lead assessor, in consultation with the comprehensive assessment team, will determine when the vision and hearing screening is required. The lead assessor will document the decision in the Comprehensive Assessment Report.
2. The lead assessor will meet with the parent/guardian and/or student to:
 - a. discuss the purpose of comprehensive assessment;
 - b. provide an overview of the comprehensive assessment process;
 - c. discuss the vision and hearing screening process (if required);
 - d. answer questions; and
 - e. explain and obtain Consent for Assessment.
3. The lead assessor may include a translator or interpreter to clarify any questions about the comprehensive assessment process when obtaining Consent for Assessment from parents/guardians and/or students with culturally and linguistically diverse backgrounds.

4. The lead assessor will inform the comprehensive assessment team of:
 - a. the vision and hearing screening results if applicable; and
 - b. that consent has been obtained and recorded in the student's confidential file.
5. The lead assessor and members of the comprehensive assessment team will develop a plan for completing the comprehensive assessment. The plan should consider:
 - a. components of the comprehensive assessment required to answer the referral question;
 - b. team member responsibilities, which vary depending on their role, qualifications and knowledge of the student;
 - c. optimal times and environments for working with the student;
 - d. assessors' schedules and availability;
 - e. a process for sharing information with team members; and
 - f. a timeframe for submitting summary reports to the lead assessor.

Components of a Comprehensive Assessment

Comprehensive assessment data is collected through a review of student records, interviews, student observations in multiple school settings and when required, the use of standardized assessment tools.

1. A comprehensive assessment will always include:

- a. a review of the cumulative and confidential files (referred to as a file review), which may include:
 - i. report cards, report card inserts, behavioural data, etc.;
 - ii. Responsive Teaching and Learning Records (RTL Policy);
 - iii. Record of Pre-referral Intervention (SDM Policy);
 - iv. previous formal and informal assessment results; and
 - v. Individual Education Plans.
- b. interviews with students, parents/guardians and educators to gather information regarding:
 - i. student learning;
 - ii. cultural considerations;
 - iii. developmental, family and medical history; and
 - iv. environmental considerations; and
- c. observation of the student in multiple school settings.

2. A comprehensive assessment may include formal and/or informal assessment of:

- a. cognitive ability:
 - i. memory;
 - ii. information processing;
 - iii. executive functioning;
 - iv. adaptive functioning;
 - v. other functions
- b. speech and language;
- c. achievement;
- d. social-emotional development;
- e. behaviour; and
- f. other variables.

When the referral question requires information beyond what can be obtained using the mandatory components, standardized assessment tools can be used. This additional data is required to increase understanding of the student's learning profile and inform teaching and learning decisions.

Assessment and Qualifications

1. When assessors use standardized assessment tools, they will adhere to the following guidelines:
 - a. Formal and informal assessment of functional vision and learning modalities to inform the teaching and learning of students who are blind or visually impaired requires a Master's degree focused on working with children who are blind or visually impaired.
 - b. Formal and informal assessment of functional hearing, language and learning modalities to inform teaching and learning of students who are deaf or hard of hearing requires a Master's degree focused on working with children who are deaf or hard of hearing.
 - c. Level A assessment (such as the Benchmark Assessment Systems, Early Listening Function, First Steps, Ontario Comprehension Assessment, etc.):
 - i. can be administered, scored and interpreted with the aid of the test manual and a familiarity with the student population;
 - ii. minimum qualifications are a Bachelor of Education degree; and
 - iii. no formal training in the assessment is required.

- d. Level B assessment (such as the Wechsler Individual Achievement Test, Woodcock-Johnson Tests of Achievement, Clinical Evaluation of Language Fundamentals, Comprehensive Test of Phonological Processing, etc.):
 - i. requires specific training for administration, scoring and interpretation;
 - ii. requires an understanding of psychometric principles, the traits measured, and the student population; and
 - iii. in addition to the qualifications for Level A assessment, Level B assessors will have an undergraduate special education course in assessment (or equivalent) OR Level C assessment qualifications.
- e. Level C assessment (such as the Wechsler Intelligence Scale for Children or Wechsler Adult Intelligence Scale):
 - i. requires specific training for administration, scoring and interpretation;
 - ii. requires an in-depth understanding of psychometric principles, the traits and constructs being measured, and the student population; and
 - iii. qualifications for administration and interpretation require at least a Master's degree in Educational Psychology or Counselling Psychology, with graduate-level training in assessment, or equivalent, including:
 - a graduate-level course in the assessment of intelligence; and
 - any additional requirements stipulated by the test publisher.

Validity and Reliability Considerations

1. All components of a comprehensive assessment can be completed by qualified assessors in a replacement position. Qualified assessors in a substitute role, however, will not engage in this process unless they are able to:
 - a. establish rapport with the student; and
 - b. engage in the comprehensive assessment process in its entirety.
2. The Comprehensive Assessment Team will be cognizant of cultural and/or linguistic diversity and Indigeneity when completing the mandatory and optional components of the comprehensive assessment.
3. In selecting standardized assessment tools, assessors will:
 - a. consider the student's developmental, physical and communication abilities;
 - b. consider the student's language, culture and background;
 - c. be aware of the validity and reliability of each instrument; and
 - d. be familiar with the instrument and be able to administer it as specified in the manual.
4. Assessors will build rapport with the student before the assessment, explaining the purpose of the comprehensive assessment and answering questions.

5. Assessors will be alert to the student's health, motivation, comfort level (physical and emotional) and fatigue level, proceeding only when the student is physically and mentally prepared.
6. Assessors will record behaviour or unexpected events during the assessment which may affect the results and interpretation.
7. Assessment will occur in a comfortable setting with adequate light, heat and space. Distractions should be minimized (private location, do not disturb sign on the door, telephone and computer muted, etc.).
8. When administering Level B and C assessments, only the assessor and the student should be present, except during special circumstances such as the requirement for an ASL interpreter, etc.

Interpreting Comprehensive Assessment Data

1. Standardized assessment instruments are not to be used in the absence of the mandatory components of comprehensive assessment (file review, observations and interviews).
2. The lead assessor will consult with members of the comprehensive assessment team to review the assessment findings and recommendations.
3. Comprehensive assessment team members are responsible for providing a written summary of their findings to the lead assessor in a timely manner. When standardized assessment instruments are used, the written summary will include data specific to the results (scores, percentiles, etc.) of the standardized instrument and observations.
4. The lead assessor will analyze all data collected through the comprehensive assessment process, including the written findings of team members. When there is inconsistent or insufficient data to answer the referral question and/or form a conclusion, further assessment is required.
5. When assessing students from culturally and linguistically diverse backgrounds, the lead assessor, in consultation with the Comprehensive Assessment Team, will:
 - a. distinguish typical learning effects due to language acquisition or academic or cultural differences from the need for special education programming; and
 - b. compare the student's progress with that of peers from a similar cultural, language, life experience and educational background.

6. Information obtained from medical professionals or other specialists outside of the education system will be considered during the interpretation process and included in the Comprehensive Assessment Report.

Note: Diagnostic information from medical professionals and specialists outside the education system **does not** determine a student's educational programming. A comprehensive assessment is required to inform teaching and learning.

Comprehensive Assessment Reports

1. Every comprehensive assessment will conclude with a Comprehensive Assessment Report.
2. The Comprehensive Assessment Report documents key findings of the assessment and makes recommendations for the student, parent/guardian and educators to inform teaching and learning.
3. The writing of a Comprehensive Assessment Report is the responsibility of the lead assessor. A Comprehensive Assessment Report:
 - a. summarizes the process and the findings of the assessment, answers the referral question and makes recommendations to inform teaching and learning;
 - b. is not generated by assessment software;
 - c. is completed using the template available within the RTL database and Appendix A
 - d. is signed by the lead assessor, and a copy is given to the parent/guardian, and/or the student; and
 - e. will be stored in the student's confidential file.
4. Components of a Comprehensive Assessment Report include:
 - a. Identifying Information (Mandatory) such as the student's name, date of birth, chronological age, grade, school, date of report, lead assessor's name and position, comprehensive assessment team members and positions.
 - b. Reason for Referral (Mandatory) which outlines the referral question and the purpose of the assessment.
 - c. Background Information (Mandatory) which is a summary of information gathered through file review and interviews.

- d. Student Observations (Mandatory) that include observations of the student made in multiple school settings.
- e. Standardized and Non-standardized Assessment Tools and Results (Optional) which identify and briefly describe the purpose of each assessment tool and the skills measured, the date administered and by whom. Results include behavioural observations made during the administration of the assessment tool.
- f. Interpretation (Mandatory) is a logical and concise presentation of the data and the lead assessor's analysis of the data. Data analysis should move from global information to specific details. This will include interrelationships among test findings and sources of data, comparisons of skills, implications of findings and impressions regarding student learning.
- g. Summary (Mandatory) provides an overview of the student's learning profile, a summary of the findings, an answer to the referral question, and the specific skill development area(s) and/or enrichment the student may require.
- h. Recommendations (Mandatory) based on the student's learning profile, provide practical and realistic suggestions to inform teaching and learning, including the need for special education programming and services. Recommendations may include follow-up referral(s) to other agencies or professionals and recommendations for parent/guardian and/or youth follow-up.
- i. Signatures (Mandatory) are required by the lead assessor, parent/guardian and/or student.

Confidentiality

1. Comprehensive assessment informs teaching and learning. Therefore, it is critical to share relevant sections of the report with educators working with the student.
2. Sections of the Comprehensive Assessment Report available to teachers working with the student include the Summary and Teaching and Learning Recommendations.
3. The information gathered through the comprehensive assessment process is confidential. Only information pertinent to the assessment findings should be documented in the Comprehensive Assessment Report.
4. The Comprehensive Assessment Report stored in the student's confidential file will not be shared externally without signed consent for information sharing.

5. Standardized assessment protocols will be stored in a sealed envelope in the confidential file and will not be reviewed in isolation from the Comprehensive Assessment Report.
6. Comprehensive Assessment Reports shared by email will be password protected.

Presenting the Comprehensive Assessment Findings

1. When the Comprehensive Assessment Report is completed, the lead assessor will meet with the parent/guardian and/or student to share the comprehensive assessment findings and recommendations.
2. The lead assessor is responsible for presenting comprehensive assessment findings in a clear, respectful and professional manner.
3. The lead assessor may include a translator or interpreter to clarify any questions about the comprehensive assessment process or education systems when sharing the findings and recommendations with parents/guardians and/or students with culturally and linguistically diverse backgrounds.
4. When the student is under 18 years of age, the lead assessor, in consultation with the parent/guardian, determines if the student attends this meeting or if a separate meeting is required.
5. Other members of a comprehensive assessment team may accompany the lead assessor to share assessment findings with the student, parent/guardian and educators, as required.
6. During this meeting, the lead assessor will:
 - a. provide a copy of the Comprehensive Assessment Report to the parent/guardian or student;
 - b. describe the assessment process, including an overview of the components of the report;
 - c. review the information gathered;
 - d. explain the assessment findings in clear terms, avoiding technical language;
 - e. explain the results to the student, if in attendance, in a developmentally appropriate manner;
 - f. explain the results concerning the:
 - i. student's learning profile;
 - ii. impact on learning;

- iii. possible programming implications, acknowledging that programming decisions are made by the program planning team; and
 - iv. implications of possible programming decisions on graduation and post-secondary options;
- g. indicate whether the student would benefit from enrichment and/or skill development programming through special education;
 - h. indicate any new diagnosis;
 - i. review recommendations for teaching and learning;
 - j. recommend follow-up with outside agencies where appropriate; and
 - k. discuss the role of the program planning team if applicable.
7. The Comprehensive Assessment Report is completed within the RTL database. A copy of the report will be printed, signed, dated and given to the parent/guardian or student.
 8. The lead assessor will inform the service delivery team of the assessment results.
 9. The lead assessor will review the assessment findings with teachers working with the student. During this meeting the lead assessor will:
 - a. explain the comprehensive assessment results in relation to the student's learning profile; and
 - b. participate in discussions about teaching and learning.

Comprehensive Assessment Scheduling, Time Frame and Waitlists

1. Administrators will ensure that members of the comprehensive assessment team have time in their schedules to complete the comprehensive assessment.
2. Assessors may be leading or involved in multiple comprehensive assessments at any given time.
3. A comprehensive assessment will be completed within 100 working days, notwithstanding extenuating circumstances (such as attendance issues, student illness, etc.). The timeline begins when the service delivery team refers the student for a comprehensive assessment and ends when the lead assessor meets with the program planning team to share the assessment results.
4. Comprehensive assessment waitlists will not delay the referral of students who require comprehensive assessments.

5. Once the service delivery team determines the assessment is necessary, the referral process is initiated.
6. Directors of Schools, in collaboration with the Director of Student Services and administrators, will monitor comprehensive assessment waitlists to ensure timely access to and completion of comprehensive assessments.
7. If the waitlist becomes a concern, the Director of Schools will work with the administrator and other relevant school personnel to address the concern. This may include:
 - a. ensuring the Service Delivery Team Consultation Request process has been followed appropriately, resulting in a valid Referral for Student Services Assessment;
 - b. reviewing time allocated in school schedules for completing comprehensive assessments;
 - c. rescheduling school personnel to respond to comprehensive assessment referrals; and
 - d. assigning educational psychologists to comprehensive assessment teams outside of their assigned schools.

Appendix A: Comprehensive Assessment Report Template

Comprehensive Assessment Report

Student Name:	Grade:
School:	D.O.B.:
Parent/Guardian:	Phone #/ E-mail:
Lead Assessor Name/Title:	Date of Report:

- **Reason for Referral (includes referral question):**
- **Background Information (Gathered through file review, observations and interviews)**
 - a. Developmental milestones (sensory and motor, speech/language, cognitive, social. emotional), medical history, and family background.
 - b. Cultural considerations
 - c. Overview of previous comprehensive assessment results
 - d. Academic history and description of learning profile
- **Summary of observations of the student in multiple school settings**
- **Standardized and Nonstandardized Assessment Tools and Results (Optional)**
 - a. Description of Assessment Tool
 - b. Interpretation of Data
- **Indicate any new or pre-existing diagnosis (if applicable with date of diagnosis)**
- **Summary of Comprehensive Assessment Findings**
- **Is Special Education Programming Recommended?**
 - Yes
 - No
- **If Yes:**
- **Special Education Programming is recommended for:**
 - a. Enrichment
 - b. And/ or the development of:

- i. Accessibility Skills
 - ii. Social-emotional/Behavioural Skills
 - iii. Academic Skills
 - iv. Adaptive Skills
- **Recommendations to inform programming decisions**
 - **Recommendations for follow-up by the parent/guardian/youth**
 - **Recommendations for Referrals or additional assessment:**

Parent/ Guardian/ Youth

Date

Lead Assessor

Date

Appendix B: Comprehensive Assessment Summary Report for Teachers

Comprehensive Assessment Summary Report for Teachers

Student name:	Grade:
School:	D.O.B.:
Parent/ Guardian:	Phone #/ E-mail:
Lead Assessor Name/Title:	Date of Report:

- **Summary of Comprehensive Assessment Findings**
- **Teaching and Learning Recommendations**

Appendix C: Vision and Hearing

Summary

- The mandatory components of comprehensive assessment can be completed without a vision and hearing assessment. Data obtained through student file reviews, interviews, and student observations in multiple school settings can support the comprehensive assessment team in determining when vision and hearing assessment is required.
- When completing interviews and observations required as part of the comprehensive assessment process,
 - the lead assessor, as part of the informed consent process will:
 - discuss and record any medical and/or family history concerns pertaining to vision and hearing. The Department of Education's *Observational Checklist for Vision and Hearing*, provided within this appendix, may assist in this process.
 - A member(s) of the comprehensive assessment team will:
 - discuss and record potential signs of visual and auditory difficulties with multiple classroom/subject teachers working with the student. The Department of Education's *Observational Checklist for Vision and Hearing* may assist in this process.
 - If no concerns are identified by the parent and/or teacher(s), the comprehensive assessment will proceed, and the team will continue to monitor the student's vision and hearing throughout the assessment process. If changes or concerns are noted, a member of the comprehensive assessment team should discuss the concerns with the parent and/or classroom teacher and do additional setting observations as required.
 - If potential concerns re vision and/or hearing are identified by the parent/guardian and/or teacher(s):
 - assessment from a specialized health professional for vision and/or hearing is required.
 - the lead assessor will make a recommendation in writing to the parent/guardian and/or student for this specialized assessment. This recommendation will be kept in the student's confidential file and the comprehensive assessment process will be halted until the

results of the vision and/or hearing assessment are available for review by the lead assessor. Teaching and learning will continue including the provision of any preventive intervention.

- When completing the comprehensive assessment report:
 - the lead assessor will document the date of the parent/guardian or student meeting obtaining informed consent, the date(s) of observation completion and the date of completion of vision and hearing checklist(s) (if used).
 - If no assessment of vision and hearing from a specialized health professional, the lead assessor shall include the following note:

Note: The potential for vision and hearing concerns were considered through observations and interviews with parent/guardian(s) and teacher(s). This is not a diagnostic process and does not ensure normal vision or hearing. This process is used to determine if there are family related concerns with vision and/or hearing or presenting classroom concerns that may impact the comprehensive assessment process and results.

Observational Checklist for Vision and Hearing

Student:

Date of Checklist Completion:

School:

Grade:

Assessment team member:

Completed with:

Directions: Please select “Yes” or “No” if any of the following signs of visual difficulties are observed. Please consider whether the difficulty you are observing can be better explained by the student’s cultural and linguistic background, developmental level and/or queried or existing diagnoses, etc. (ex. New to school, have or are being considered for medical diagnoses)

Behaviour in the classroom	Yes	No
The student rubs their eyes excessively.	•	•
The student often covers one eye or tilts their head when reading.	•	•
The student blinks excessively.	•	•
The student often holds a book close to their face when reading.	•	•
The student often leans closer to the book when reading.	•	•
The student often loses their place when reading.	•	•
The student squints when looking at distant objects.	•	•
The student often bangs into objects in the classroom.	•	•
The student’s eyes do not line up with one another (strabismus).	•	•
The student reports headaches when reading or completing visual work.	•	•
The student reports nausea when reading or completing visual work.	•	•
The student reports that their eyes feel tired when reading or completing visual work.	•	•
The student reports dizziness when reading or completing visual work.	•	•
The student reports they have blurred vision.	•	•
The student reports they require more light when reading or completing visual work.	•	•
The student reports their eyes itch, burn or hurt.	•	•

Directions: Please select “Yes” or “No” if any of the following signs of hearing difficulties are observed. Please consider whether the difficulty you are observing can be better explained by the student’s cultural and linguistic background, developmental level and/or queried or existing diagnoses, etc. (ex. New to school, have or are being considered for medical diagnoses)

Behaviour in the classroom	Yes	No
The student does not respond as expected to sounds.	•	•
The student struggles to understand the location of sounds.	•	•
The student is often inattentive during conversations.	•	•
The student struggles to follow verbal directions.	•	•
The student often leans forward to listen to conversations.	•	•
The student often asks others to look at them when speaking.	•	•
The student struggles to hear when there are background noises.	•	•
The student often asks for directions to be repeated.	•	•
The student has articulation difficulties.	•	•
The student often confuses similar sounding words.	•	•
The student frequently turns one ear toward the speaker.	•	•
The student often speaks too loud or too soft.	•	•
The student often cups their hand behind their ear when listening.	•	•
The student has atypical voice quality (high pitched, monotone).	•	•
The student reports pain in one or both ears.	•	•
The student reports ringing in the ears.	•	•

Observation Completed on:

Setting of Observation:

Notes:

Appendix D: File Review for Comprehensive Assessment

Student:				Grade:		Age:	
Referral Question:							
Review Completed By:				Review Date:			
School	Grade	Year	Days Absent	Relevant Comments/Grades	Intervention and Programming	Assessment Information	

File Review for Comprehensive Assessment

Patterns of Strengths	Patterns of Needs	Learning Preferences
Questions or concerns arising from this review		
Medical Information - Please specify any pertinent information		

Signature: _____

Date: _____

