Assistive Technology Model Operating Guidelines

for

School Districts and IEP Teams

Offered By:
The Advisory Committee of
the Oregon Technology Access Program
Gayl Bowser, *Editor*
June, 2003

Oregon Technology Access Program
1871 NE Stephens
Roseburg, OR 97470
(541) 440-4791
www.otap-oregon.org
gayl.bowser@douglasesd.k12.or.us

This document was created in response to a need expressed by many of Oregon's school administrators. It was funded entirely through a grant to Douglas Education Service District's Oregon Technology Access Program from the Oregon Department of Education. Our thanks go to the Los Angeles Unified School District which gave us permission to use documents from that agency in the preparation of this model.

It is intended that *Assistive Technology: Model Operating Guidelines for School Districts and IEP Teams* be used as a starting point for the development of operating guidelines that are tailored to local resources and service designs. Any part of these guidelines may be copied or revised for use by an individual program or agency. The document is available in PDF format on the web site of the Oregon Technology Access Program (www.otap-oregon.org).

For further information contact:

Gayl Bowser, Coordinator
Oregon Technology Access Program
1871 NE Stephens
Roseburg, OR 97470
541-440-4791
gayl.bowser@douglasesd.k12.or.us

The following individuals are members of the Advisory Committee of the Oregon Technology Access program. They acted as advisory, guides and field readers for this project.

- Paul Andrews, Program Supervisor
  Central Oregon Regional Program
- Kari Baybado, Augmentative Communication Specialist
  Union Baker ESD
- Freda Caufield, Augmentative Communication Specialist
  Northwest Regional ESD
- Kris Davis, Assistive Technology Specialist
  Jackson ESD
- Melanie Fried Oken, Director
  Assistive Technology Program, OHSU/CDRC
- Janet Gensert, OT
  Portland Public Schools
- Carol Kimball
  Portland Public Schools
- Lynn Langley, Occupational Therapist
  Linn Benton Lincoln ESD
- Shar Burgoyne-Lopez, Technology Trainer
  Oregon Technology Access Program
- Christine Macfarlane, Associate Professor
  Pacific University, School of Education
- Betty Madsen, Program Assistant
  Salem Keizer School District
- Sue Scott, Special Educator
  Willamette ESD
- Peg Slothower, Augmentative Communication Specialist
  Central Oregon Regional Program

Many thanks to all committee members for your willingness to share your expertise, your broad range of experience and your passion for this important work.

Table of Contents

Page

Acknowledgments 2

Introduction 7

Rational for Developing Assistive Technology Operating Guidelines 9

SECTION ONE
Assistive Technology:
Model Operating Guidelines for School Districts and IEP Teams 11
Legal Requirements 14
Guidelines for IEP Teams 16
IEP Team Procedures 19
Resources 23

SECTION TWO
Assistive Technology:
Forms and Tools to Assist the IEP Team 25
A Way to Think About Assistive Technology 26
Frame the Question 29
If the Team Needs Help to Frame the Question 31
Assessment 34
If the Team Needs Help with Assessment 36
Consider the Need for Assistive Technology 40
If the Team Needs Help with Consideration 43
Implementation 47
If the Team Needs Help with Implementation 49
Periodic Review 54
If the Team Needs Help with Periodic Review 56

APPENDIX 59
Frequently Asked Questions 60
Sample District Policy for Provision of Assistive Technology,
for Use at Home, and for Transfer of Equipment 66
Sample Position Description 67
Assistive Technology Specialist Competencies 68
Use Agreement for Long-term Equipment Loan 71

REFERENCES 77

Introduction

The amendments to the Individuals with Disabilities Education Act of 1997 (IDEA '97) make clear the school district's responsibility to provide assistive technology if a child needs it for a free and appropriate public education (FAPE). IDEA '97 does not, however, offer specific instruction as to the ways assistive technology decisions should be made or the process that education agencies should follow. Without specific guidance many Individualized Education Program (IEP) teams find themselves confused as to how to proceed when considering the assistive technology needs of students with disabilities.

This document is designed to be used as a template by education agencies wishing to develop assistive technology processes that are effective, legal, ethical and cost efficient. It offers a process which starts with individual student teams. The process guides those teams through assistive technology assessment, consideration of assistive technology need, implementation, and periodic review of assistive technology programs. The focus is on establishing a process which can be used throughout an education agency by a variety of student teams. Some teams may need to call upon people with additional expertise when a student requires complicated or unusual technology tools. Processes are also described to help teams add members who can offer the expertise they need.

In Section Two, sample forms have been provided which may be used to document team activities at each step presented in the Model Operating Guidelines. Each form is accompanied by a brief explanation of the purpose and use for which it was created.

There is no perfect way to provide assistive technology services. The unique nature of each child's needs requires flexibility for team actions. At the same time there is a need for a process which ensures agency-wide consistency and quality in the services provided to all children. The **Model Assistive Technology Operating Guidelines** are offered as a starting point for education agencies that wish to ensure that quality assistive technology services are available to all of their students with disabilities.

Rationale for Developing Assistive Technology Operating Guidelines

This document offers a sample process for schools to use when addressing each student's need for assistive technology (AT). It is based on an assumption that the primary responsibility for assistive technology assessment, consideration of need, and implementation of assistive technology plans resides with the child's Individualized Education Program (IEP) team or Individualized Family Service Plan (IFSP) team.

A system which places the primary responsibility for assistive technology with the IEP/IFSP team, rather than with an assistive technology specialist, requires that all team members have a very basic level of information about AT. Team members need to know what assistive technology is and what it is not. They need to know what the Individuals with Disabilities Education Act (IDEA) and Section 504 say about assistive technology. They need to know something about the assistive technology that is most frequently used by the children for whom they provide services.

When education agencies assign the responsibility for assistive technology assessment and decision making to IEP/IFSP teams, they increase the likelihood of effective AT use by those children who need it. The sample assistive technology processes, presented here, were developed based on the assumption that all teams will be able to describe the tasks that are difficult for the child, the child's strengths and needs, the environmental factors that influence the child's performance and the commonly used tools that might help the child to do those tasks. It requires that teams have access to an assistive technology specialist, know when they need additional help, and know how to find that help when they do not have enough information.

To ensure equitable, effective and cost efficient assistive technology services, many education agencies have developed assistive technology guidelines with the goal that every IEP/IFSP team follows a consistent process when considering assistive technology. This manual offers samples of such a process. Materials included have been assembled from many education agencies. When materials were directly borrowed from a particular source, the source has been credited. In some cases, critical elements from a variety of sources have been combined to create new documents. Particular thanks should be given to the staff of the Los Angeles Unified School District, which allowed us to use large portions of their district Assistive Technology Guidelines for IEP Teams in the development of this document.

SECTION ONE

ASSISTIVE TECHNOLOGY

Model Operating Guidelines for School Districts and IEP Teams

Sample School District Assistive Technology: Operating Guidelines

These special education assistive technology guidelines have been developed to provide assistance to Individualized Education Program (IEP) teams, when determining whether a student with disabilities requires assistive technology devices and services in order to receive a free appropriate public education (FAPE), as required by the Individuals with Disabilities Education Act (IDEA).

The guidelines have also been developed to provide uniform documentation across the District through the use of forms found in Section Two.

These guidelines shall be made available to all District staff participating as IEP team members, including but not limited to the administrator or administrative designee, general education teachers, special education teachers, special education itinerant staff, and support services staff.

Legal Requirements

Individuals with Disabilities Education Act (IDEA) requires Individualized Education Program (IEP) teams to consider the assistive technology needs of a student during the development of an IEP. The law further defines assistive technology devices and services.

DEFINITIONS

ASSISTIVE TECHNOLOGY DEVICE

Any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized that is used to increase, maintain, or improve functional capabilities of a child with a disability.

ASSISTIVE TECHNOLOGY SERVICE

Any service that directly assists a child with a disability in the selection, acquisition, or use of an assistive technology device.

This includes:

a. The evaluation of the needs of such a child, including a functional evaluation of the child in the child's customary environment;
b. purchasing, leasing, or otherwise providing for the acquisition of assistive technology devices by such child;
c. selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing of assistive technology devices;
d. coordinating and using other therapies, interventions, or services with assistive technology devices such as those associated with existing education and rehabilitation plans and programs;
e. training or technical assistance for such child, or where appropriate, the family of such child; and
f. training or technical assistance for professionals (including individuals providing education and rehabilitation services), employers, or other individuals who provide service to, employ, or are otherwise substantially involved in the major life functions of the child.

FREE APPROPRIATE PUBLIC EDUCATION (FAPE)

IDEA requires local education agencies to ensure that assistive technology devices and/or services are made available to a student with a disability at no charge to the family of the student, if required as part of the student's special education program and/or related services or if needed for the student's access to the curriculum.

1. IDEA regulations require that if the IEP team determines that a particular assistive technology device is required for home use in order for the student to achieve the goals and objectives on the IEP, the equipment must be provided for use at home. The IEP team should base its decision for home use on the educational and instructional activities that need to be completed outside of the school setting.

2. For students age 14 and older, IDEA requires that beginning at age 14, a student's IEP must have a statement of the transition service needs of the student that focuses on the student's courses of study. Beginning at age 16, a statement of needed transition services for the student must be included on the IEP, including a statement of interagency responsibilities. Equipment provided for a student enrolled in the District is returned to the District upon graduation. If assistive technology and services have been provided as part of the student's school program, a determination regarding continued need after graduation must be made by the IEP team. Provisions for interagency support for assistive technology devices and services should be specified as part of the transition plan, when appropriate.

Guidelines for IEP Teams

DEFINITION OF ASSISTIVE TECHNOLOGY

The definition of AT in the law is broad and includes almost any type of device used to support the education of a student with a disability. The word "technology" in the phrase assistive technology does not imply a requirement for electronic components. For all students with disabilities, it is important for IEP teams to recognize that AT encompasses a range from the low end of devices (e.g., picture boards, wide-lined paper, pencil grips, calculators, typewriters) to the high end which may include computers or devices with computer components *(See Section Two, page 41: Assistive Technology Considerations* chart*).*

AT is not educational technology. Educational technology (hardware and software) functions as a supplement to the curriculum. It reinforces concepts taught and is one of the many instructional tools available to a teacher. Educational technology should not be specified in the IEP.

RELATIONSHIP OF ASSISTIVE TECHNOLOGY TO STRENGTHS AND NEEDS

AT is one aspect of a multifaceted approach to addressing the strengths and needs of a student with disabilities. The needed technology must be considered in relation to the student's learning potential, motivation, chronological age, developmental level, and curriculum access needs. AT is a tool for access that will change over time as the student's needs change and as advancements are made in technology.

APPROACH TO ASSISTIVE TECHNOLOGY ASSESSMENT

The need for assistive technology (AT) should be an integral part of a comprehensive assessment for a student in all areas related to his/her disability and/or educational needs. AT considerations should be part of a collaborative school-based approach that includes service providers who are knowledgeable about the child's disability and the aspects of AT associated with the disability.

CONSIDERATION OF THE NEED FOR ASSISTIVE TECHNOLOGY

IEP teams are required to consider the need for AT devices and services. AT considerations must address the student's need to access curriculum and specially designed goals and objectives. IEP teams must ask the question, 'What does the student need to do that he/she cannot do because of his/her disability?" Consideration does not imply a mandate for an AT assessment or for the actual provision of devices for every child with a disability. For example, if a student's performance is functional in relation to curriculum and goals, the consideration should be brief and consensus should be reached relatively quickly with the conclusion that AT is not needed at this time.

TRIAL PERIODS OF ASSISTIVE TECHNOLOGY USE

In some cases, the IEP team consideration may lead to a recommendation for a short-term trial with new strategies or devices available at the school. In this case, the team should check the "yes" box which addresses AT in the special factor's section of the IEP. Such trials should be written into an IEP goal or short term objective with a time frame and measurable criteria to evaluate progress. The IEP team should plan a subsequent IEP meeting to review the results of the trial period or to provide other considerations for AT.

ASSISTANCE FROM ASSISTIVE TECHNOLOGY SPECIALISTS

After an AT assessment is completed at the school and attempts to use school-based AT resources are not successful; an IEP team may request a more in-depth AT assessment from the District, Regional or Education Service District programs.

DOCUMENTATION OF A CHILD'S NEED FOR ASSISTIVE TECHNOLOGY

IEP teams must specify the type of device the student needs (i.e., pencil grips, word processing software, augmentative and alternative communication system). The IEP team should not specify brand names unless a device has particular characteristics that require the child to learn operational skills that are unique to the device provided.

PARENT REQUEST FOR AN ASSISTIVE TECHNOLOGY ASSESSMENT

Parents have a right to request an assessment of their child. Including an assessment for assistive technology. When a parent makes such a request, the following procedures are to be followed, unless there is a substantial basis for believing that an assessment is not necessary and the parent is so informed in writing:

1. School personnel must complete the "Permission to Evaluate" form, specifying the area of need (i.e., assistive technology for writing, assistive technology for oral communication, etc.).

2. School personnel are to follow these steps in completing an AT assessment:
   a. form a school site assessment team;
   b. collect information about what accommodations have been made to date, and documenting such;
   c. collect additional information as planned by the school site assessment team;
   d. write an assessment report;
   d. hold an IEP meeting to review the assessment results; and
   f. recommend and provide devices and services if needed by the student.

Steps for IEP Teams When Considering Assistive Technology Needs

PRIOR TO THE IEP MEETING

Each IEP Team member should:

- Collect information about the student, the environments where the student experiences barriers to meeting IEP goals or accessing the curriculum, and the tasks the student needs to accomplish.
- Collect information about the adaptations, accommodations, and AT options that have been tried to date to assist the student in overcoming barriers to learning.
- Collect information regarding school site resources and options which might help the student to overcome barriers to learning.

DURING THE IEP MEETING

- Describe the student's present level of educational performance.
- Identify areas of concern.
- Identify annual goals and short term objectives.
- Continue to recommend school-site resources and interventions until the student's needs are met, or until it is determined that school-site personnel lack the necessary expertise to make further recommendations.
- Document assistive technology decisions made during the meeting.

WHEN MORE INFORMATION IS NEEDED

- Document the results of the AT consideration (use the form on page 41).
- Obtain permission to further evaluate the child's need for assistive technology.
- Develop an assistive technology assessment plan.

AFTER THE IEP MEETING

- Arrange for any needed assistive technology to be obtained.
- Develop an implementation plan which includes student training, staff training, device maintenance and ongoing evaluation procedures.
- Implement the plan, OR
- Implement the assessment plan.
- Reconvene the IEP meeting to review progress and modify the program if necessary.

IEP Team Procedures

PRIOR TO THE IEP MEETING

Every IEP team member is responsible to participate in the consideration of a student's need for assistive technology. In order for that consideration to be valid, information and documentation shall be collected prior to the IEP meeting regarding the child's strengths and functional needs. Include information about the adaptations, accommodations, and AT options that have been tried to date. (See Section Two: Resources and Tools).

In addition, school personnel should attend the IEP meeting with knowledge of school site resources and AT options, if the need for additional adaptations, accommodations, and/or equipment trials is anticipated.

DURING THE IEP MEETING

During the IEP meeting, IEP team members will do the following:

1. During discussion of present levels of performance:
   a. Present the information gathered prior to the IEP meeting, and record that information in the present level of performance section of the IEP as appropriate. Identify specific areas of the curriculum (e.g. reading, writing, math, oral communication, listening, study skills, orientation and mobility, activities of daily living) which are of concern for the student.
   b. Review all of the adaptations, modifications, resources and equipment trials which have been conducted including descriptions of what was tried, for how long, under what conditions, and the criteria for determining if the need was met.
   c. Continue to recommend school-site resources and interventions until the student's needs are met, or until it is determined that school-site personnel lack the necessary expertise to make further recommendations.
   d. After the IEP team has exhausted on-site resources, refer the student to the appropriate District program (see District Contact Information on Page 23):

2. If the IEP team recommends that the student does not require AT devices or services, check "No" in the special factors section. Document the decision in the IEP meeting minutes or on the AT Consideration form found in Section Two.

3. If the IEP team recommends AT devices and services available at the school site, the team will:
   a. Write a statement in the *Present Level of Performance* section for the specific performance skill area indicating any type of AT which has been identified.

      Example: Present Level of Performance

      S. has fine motor weaknesses. The classroom teacher has provided S. with primary pencils, a slant board and wide-lined paper to facilitate manual writing. Using these tools, S. has improved ability to produce legible writing. IEP team recommends continued use of these forms of assistive technology for writing.
   b. Write a goal statement in the, Annual Goals/Objectives section of the IEP , incorporating the AT selected.

      Example: Performance Area identified: Writing

      Annual Goal: Using primary pencil, slantboard and wide lined paper, S. will write-(#) spelling words per day with (%) accuracy (#) times
   c. In the special considerations section, check "Yes" to indicate a need for assistive technology.

      Example: <u>Consideration of Special Factors</u>

      A. Does the student need assistive technology devices or services?

      X Yes, services/devices addressed in IEP __ No

REQUESTING ASSISTIVE TECHNOLOGY ASSISTANCE

If the IEP team determines that it needs assistance in exploring additional AT options for a student, the team should:

1. Complete a Permission to Evaluate for the specific performance area describing what specialized equipment and accommodations have been tried, by whom, and the results.

2. State that additional assistance will be requested indicating the specific performance area (i.e., reading, math, etc.) and the functional access area of need (i.e., hearing, vision, speech, motor skills, etc.).

   Example: The classroom teacher has used a variety of devices to improve the student's ability in the performance area of writing. S. has used primary pencils, a slant board, and wide-lined paper. Strategies have included a reduction in the number of task items, increased time to complete tasks, and hand-over-hand assistance in writing. Student's written work continues to be below grade level. School-site team will conduct an assessment in conjunction with the AT program to determine if S. can benefit from additional devices or services.

3. Complete an assessment plan to be implemented by school-site personnel in consultation with appropriate staff from the AT and/or disability-related services programs. The school site assessment team shall consist of the classroom teacher and/or special education teacher and the appropriate related services provider(s). The person at the school site, who will be responsible for the assessment, should be listed with his/her position and the due date (within 60 days of signed assessment plan).

4. An IEP amendment meeting is held to review the assessment results when the AT evaluation is completed. The school site assessment team shall provide a written report and make recommendations to the IEP team. The IEP team has the responsibility to determine which, if any, recommendations will be followed. If the IEP team recommends that the student needs AT devices or services, it must complete an amendment to the IEP that includes the information in #3 above.

AFTER THE MEETING

The IEP administrator/designee is responsible for sending the following information to the appropriate District program immediately after the conclusion of the IEP meeting:

1. A copy of the IEP with documentation and meeting minutes if they were taken.

2. Once an IEP team determines that a student requires an assistive technology device or service, it is the responsibility of the school to:

   a. Provide or arrange for the provision of the device(s) as soon as possible. Determine which of the school site funding sources can be utilized to purchase the device(s) if not available in the school site inventory of equipment. If the device(s) cannot be secured at the school site, contact the Assistive Technology Program for further assistance.

   b. Provide or arrange for the provision of any needed staff development regarding the use of the device(s).

   c. Provide or arrange for the training of the student in the use of the device(s).

   d. Maintain the device(s) in good working order.

   e. Evaluate and document the effectiveness of the device on an ongoing basis and present such information at the IEP review.

   f. Arrange for the transport of the device(s) when the student transfers or transitions to a different school within the District or when the device(s) are needed for participation in the Extended School Year (ESY).

   g. Return equipment to the school site or the District inventory for use by another student, if a determination has been made by the IEP team that the student is not benefiting from the equipment or that it is no longer needed.

OR

2. An assessment plan signed by the parent requesting an assistive technology assessment, with an indication on the plan related to the functional area of need (i.e., assistive technology for writing, assistive technology for oral communication, etc.).

Resources

Local Resources

Note: This section of the Model Operating Guidelines is intended to offer contact information for District consultants and resources that the IEP team could use to help in the consideration of a child's need for assistive technology. These resources might include information regarding:

- *Consultants with expertise about specific disabilities or learning activities.*
- *Agency equipment loan opportunities when trial periods are needed.*
- *Agency staff with expertise in specific kinds of assistive technology.*
- *Assessment services for academic, functional and behavioral assessments beyond the scope of an IEP team's expertise.*
- *Non-District resources such as ESD's or Regional programs which the IEP team may call upon for help.*

STATE AND NATIONAL RESOURCES
REGARDING ASSISTIVE TECHNOLOGY PROCESS

www.otap-oregon.org The *Oregon Technology Access Program* provides equipment loan, training, and technical assistance regarding the use of assistive and instructional technology for children with disabilities to Oregon educators.

www.gpat.org The *Georgia Project for Assistive Technology* website offers a variety of forms and other training resources which can help guide the IEP team in assistive technology decision making

www.qiat.org The *Quality Indicators for Assistive Technology Services* Consortium offers resource information and a national forum to discuss assistive technology service questions and share information.

www.texasat.net The *Texas Assistive Technology Network* website offers a Consideration guide and accompanying video which can help the IEP team learn strategies for the consideration of assistive technology needs.

www.wati.org The *Wisconsin Assistive Technology Initiative* web site offers a variety of forms and information resources which can guide the IEP team through the process of assistive technology assessment.

SECTION TWO

ASSISTIVE TECHNOLOGY

Forms and Tools to Assist the IEP Team

A Way to Think About Assistive Technology

Like any other strategy used to help educate children with disabilities, assistive technology decisions are the responsibility of the IEP team. Assistive Technology consideration is a collaborative student-centered process. The team that considers assistive technology should also be the IEP or IFSP team, expanded as needed, to include additional members who have information or special expertise about the assistive technology solution the team is considering. If the team does not include people who have sufficient knowledge about the child, the tasks the child needs to complete, and the environments where those tasks must happen, as well as people who know about the assistive technology that might help the child, then the team does not have enough information to really consider the need for assistive technology

The steps a team should take when considering a child's need for assistive technology are the same as the steps the team would take when considering any other educational need. According to procedures outlined in federal and state statutes, the team would....

- **Frame the Question**
  Collect information to help pinpoint the barriers the child is encountering.

- **Adjust the Current Educational Program**
  Modify the currently used instructional strategy. If team members need help to change the instructional strategies, they might ask for advice from a person who has expertise in the specific goal area.

- **Assess the Child's Performance**
  Collect additional information about the child, the tasks for which the child is encountering barriers and the environments where the child needs to complete those tasks.

- **Consider the Need for Assistive Technology**
  If at any time in the process, the team found that it was necessary to do specific things for the child in order to ensure educational benefit, the team would modify the educational program to reflect what should be done.

- **Implement the Program Plan**
  Plan to ensure that the educational program is delivered in the way that it was described in the IEP.

- **Evaluate the Child's Progress**
  Periodically evaluate the child's progress and make adjustments to the educational program based on the evaluation data.

In the process described above, all actions regarding a child's educational program begin and end with the IEP team members. People with additional expertise are added to the team if the existing team members do not have the information they need to develop a program which meets the student's educational needs.

The following pages offer a variety of forms and tools which can assist an IEP team in the assessment of a child's need for assistive technology and in the development, implementation and evaluation of a plan that includes it. Sections are included for each of the actions that a team might take as shown in the chart below. For every action, a form is included that IEP team members can use to guide their work. An additional tool is also offered that could be used if team members determine that they need additional expertise.

IEP Team Actions

Frame the Question:

What do we need to know about the student's use of AT?
Tool for the Team: Framing the Question worksheet
If the Team Needs More Information:
Request for Assistive Technology Assistance

Assessment:

Review available information and collect new information that is needed.
Tool for the Team: SETT Framework Grid
If the Team Needs More Information:
Assistive Technology Student Information Questionnaire

Consideration of Need:

Consider the need for AT and document the team decision.
Tool for the Team: Assistive Technology Consideration Worksheet
If the Team Needs More Information:
Extended Assessment Plan

Implementation:

Plan interventions and training.
Tool for the Team: Planning for AT Competence
If the Team Needs More Information:
Assistive Technology Implementation Plan

Periodic Review:

Evaluate the effectiveness of the plan.
Tool for the Team: Data Collection Chart from Data Manual
IIf the Team Needs More Information:
AT Progress Report

Frame the Question

When IEP teams begin to look at the assistive technology needs of an individual student, they sometimes ask questions that are too general such as “Does this student need assistive technology?” They sometimes ask questions that are too specific, like “How can this student use a computer to communicate?” A poorly framed question can cause an IEP team a lot of trouble.

Assistive technology questions should be framed around the barrier that keeps a student from meeting IEP goals and objectives or from having access to the school curriculum. The definition of assistive technology is "any item, piece of equipment or product system that is used to improve, increase or maintain the functional capabilities of a child with disabilities." When the team begins to examine the possibilities of a student’s use of assistive technology, team members should discuss the functional capabilities of the student and the barriers created by the student’s disability.

A good referral question should be crafted so that everyone on the team knows what is going to be assessed. A good initial assistive technology question should include the following information:

1. What is the task the student needs to accomplish?
2. What is the student's present level of performance on that task?
3. How is the student's disability affecting his/her performance?
4. Where (in what environments) does this task need to be done?
5. Are there environmental concerns or other issues that the AT assessment team needs to know about?
6. Are there specific tools or strategies that someone on the team thinks should be considered?

To develop a useful assistive technology question, team members must agree on the issue that they are addressing. By focusing on specific tasks in customary environments, the team can begin to discover appropriate solutions for a student. Good questions consider educational strategies as well as assistive technology options.

On the following page, you will find a worksheet which can be used as a tool to help the team identify a useful assistive technology question.

FRAMING THE QUESTION FOR:

_____

STUDENT NAME

INITIAL REFERRAL QUESTION

What is the task the student needs to accomplish?

In what environments?

What is the student's present level of performance on this task?

Are there environmental concerns or other issues that need to be taken into consideration?

Are there specific tools or strategies that a team member believes might be of help with this functional life skill?

REFERRAL QUESTION

If the Team Needs Help to Frame the Question

The question that an IEP team frames directs the entire assistive technology process. This is a critical step! A properly framed question is both specific to the child and open to an effective solution. The question is neither too vague nor too specific. Teams for some children are easily able to identify the initial question and to begin to collect the information they need to answer it. Other teams may need help from a person who is more knowledgeable about assistive technology before they begin the assessment process.

The team uses the framed question to direct the rest of the assessment. During the assessment process, the team may revise the initial question based on the new knowledge, but the question should always remain task focused. The AT assessment process is like a jigsaw puzzle. The well-framed referral question provides the outer edges (or frame) for the rest of the pieces.

When team members need help in formulating a referral question about assistive technology, they may call on the agency's assistive technology consultant or some other person with additional expertise. If an IEP team needs more information in order to frame a question, the team should complete the form on the next pages and send it with a *Permission to Evaluate* form to the district's assistive technology consultant.

Assistance Request for Assistive Technology

STUDENT NAME_____ BD_____ ❒ M ❒ F STUDENT #_____

ATTENDING SCHOOL_____ PHONE _____ RESIDENT SCHOOL _____GRADE_____

Parent/Guardian/Surrogate/Adult Student _____

Address_____ Telephone_____

CASE MANAGER_____ Annual Review Date_____ Third Year Re-evaluation Date_____

Eligibility_____ 504

Speciality Designed Instruction

❒ Reading ❒ Behavioral ❒ Vocational Education
❒ Math ❒ Physical Education ❒ Transition Services
❒ Written Language ❒ Communication ❒ Other_____

Classroom Setting

❒ Regular Education ❒ Resource Room ❒ Self Contained
Approximate % of time_____ Approximate % of time_____ Approximate % of time_____

Current Related Services:

❒ Counseling ❒ School Health ❒ Orientation/Mobility
❒ Physical Therapy ❒ Communication (speech/lang) ❒ Interpreter
❒ Occupational Therapy ❒ Behavioral ❒ Autism Specialist
❒ Augmentative Communication ❒ Deaf/Hard of Hearing ❒ Vision Specialist

Medical Considerations

❒ History of seizures ❒ Frequent pain
❒ Currently on medication for seizure control ❒ Frequent upper respiratory infections
❒ Degenerative medical conditions ❒ Digestive problems
❒ Multiple health problems ❒ Fatigues easily
❒ Frequent ear infections ❒ Other _____
❒ Current medications (describe if known) _____
_____

Referrals in Process

❒ OT/PT ❒ Vision ❒ Hearing ❒ Augmentative Communication ❒ Autism-MORS or 24J (circle one)

Student Abilities

What does the student need to be able to do that he/she is not able to do as a result of the disability?

_____
_____
_____

Describe the environment(s) in which the student may need assistive technology (i.e. regular ed classes, resources room, self-contained, library, play ground, lunch):

_____
_____
_____

What interventions have been tried?

_____
_____
_____

Assistance Request for Assistive Technology
SS5
(Page 2)

Assistive Technology Currently Used

_____
_____
_____

General Info:

1. Does the student have behaviors (positive or negative) that significantly impact his/her performance?

_____
_____
_____

2. Are there significant factors about this student's strengths, learning style, coping strategies, or interests that the team should consider?

_____
_____
_____

3. Are there any other significant factors about this student that the team should consider?

_____
_____
_____

4. Please attach the current IEP. You may also want to attach student work samples that would be helpful for the committee to review.

SEND TO: Assistive Technology Committee
Student Services

Assistive Technology

❒ Evaluation Assistance
❒ Equipment Trial - (SS6) to be returned to AT Committee by _____
❒ Request for more information
❒ Other _____

Comments:

_____
_____
_____
_____
_____
_____

Assessment

The AT assessment process involves a series of steps to help the team collect information. The team focuses attention on the tasks the child needs to do by:

- Reviewing available information
- Identifying needed information
- Adding new team members
- Collecting needed information
- Trying tools and strategies

One good way for teams to approach an assistive technology assessment is to use the SETT Framework originally developed by Joy Zabala (Zabala, 1995). The SETT Framework is used as a tool to help collaborative teams gather and organize information so that the teams can correctly identify problems and seek effective solutions. Using the SETT framework provides a way to build group knowledge about the **S**tudent, the student's customary **E**nvironments, the **T**asks the student must complete to be a more active participant in those environments, and finally, the **T**ools required to support the student in achieving the tasks (**S**tudent, **E**nvironment **T**asks and **T**ools =SETT).

There are many ways in which teams can obtain SETT information. Some of the most important methods include:

- talking with the student and the student's extended team
- thoroughly reviewing the student's cumulative records
- analyzing the products the student has created
- observing the student directly in several environments
- videotaping the student in customary environments

The SETT Framework chart on the following page is a good tool for teams to use to help them organize information so that it can be used for decision-making. First, team members share what they know, and record what they still need to know. This information is used to plan assessment activities and to determine whether additional help or resources will be needed.

The SETT Framework

A Collaborative Planning and Decision-Making Tool

Student _____Date _____Perspective _____

	Student	Environment	Tasks	Tools
What we know				
What we need to know				

Developed by Joy Zabala, Educational Specialist, joy@joyzabala. com

If the Team Needs Help with Assessment

IEP team members assess the student's need for assistive technology by reviewing the student's present level of performance and the goals and objectives in the student's IEP plan. Because identifying appropriate assistive technology solutions is critical to the student's success, the team may need to add members who can enhance the group's collective knowledge of the student and provide information about AT devices and services. It is important for the team to identify what they know and collect additional information before considering AT in an IEP meeting.

When teams look at who might be added to the team as they start sharing information, it is important to remember that each person brings a different expertise to the discussion. One person may be very knowledgeable about the student's cognitive abilities, another may be concerned with motor abilities, and another about how the child is moving forward in his educational program. When the team completes an assistive technology assessment it may be necessary to add people who have knowledge of AT processes and tools that can support that student. This ensures that the whole student is considered when the team looks at whether to fit assistive technology tools into that student's educational program.

The form on the following pages can be used by the team to ask a person knowledgeable about assistive technology to join the AT assessment team. It can provide a basic amount of information before the AT specialist joins the team.

Return to: Assistive Technology Consultant Name:_____
Address:_____
_____
Phone:_____ Fax:_____
Email:_____

NOTE: *A Permission to Evaluate form must accompany this request for consultation.*

Assistive Technology Student Information Questionnaire

Student Name: _____

School District: _____

Date of Birth: _____ Age: _____ Grade: _____

School Name: _____

School Phone: _____

Parent(s) Name(s): _____

Parent(s) Address: _____

Parent Phone: _____

Student's Disability: _____

Classroom Setting: _____

With what student goals is the IEP team requesting assistance?

Please list past/current accommodations or devices that have been tried to help the student achieve these goals and provide information about the results of trying each intervention.

(continued)

What strengths and limitations does the student have in each of the following areas as they relate to the goals you listed above?

General Health

Strengths

Limitations

Motor

Strengths

Limitations

Vision

Strengths

Limitations

Hearing

Strengths

Limitations

Communication

Strengths

Limitations

Cognitive/Academic

Strengths

Limitations

Social/Emotional

Strengths

Limitations

Motivation

Strengths

Limitations

What other resources does the student have that would be helpful (e.g., peers that want to help, one-to-one aide, DD services, involved family members, etc.)?

What else would you like the AT consultant to know about this student before the school visit?

_____

Signature: *Person(s) Completing this Report* Date

_____

Print Name of Person Completing Report Here

_____

Phone Number and Times Person Completing Report Can Be Reached

Please make a copy for the team and return the original to:
(Insert Address Here)

_____

_____

_____

_____

Consider the Need for Assistive Technology

In 1997, when Congress reauthorized the Individuals with Disabilities Education Act, a list of special factors was included. One of those special factors was consideration of the child's need for assistive technology.

Assistive technology considerations occur during the student's IEP meeting. IEP team members consider the need for assistive technology by reviewing the student's present level of performance and the goals and objectives in the student's IEP. Consideration of the need for assistive technology is usually a brief process during an IEP meeting. At least one person on the team must have knowledge of assistive technology in order for the team to make an informed decision. Assistive technology should be considered in the areas of instructional need, developmental milestones and access to the general curriculum addressed by the IEP document.

When assistive technology is considered, there are four possible conclusions the team can reach:

1. The student is making adequate progress. The student does not need assistive technology at this time.

2. Assistive technology is needed and is successfully being used. The student has been using assistive technology devices and services that have proven effective. These devices and services have been included in the IEP to ensure that they are available to the student.

3. Assistive technology is needed but the team is not clear what device or service would best meet the student's current needs. The need for assistive technology is documented in the IEP and plans for an assistive technology assessment are implemented.

4. The team does not know if assistive technology is needed. Further assessment is planned. Following the completion of the assessment, the IEP/IFSP team reconvenes to review the results (Reed: 1998).

On the following pages is a form that the team can include with a student's IEP to record the results of AT consideration.

Assistive Technology Consideration

Student: _____ School: _____

Persons Present: _____ Date: _____

1. Does the student have IEP goals or need accommodations in any of these areas? What tasks do we want the student to do? Check each relevant task below and list in Consideration Record:

	Not a Concern	Addressed Below		Not a Concern	Addressed Below
a. Activities of Daily Living (ADLs)	❒	❒	h. Math	❒	❒
b. Communication	❒	❒	i. Mechanics of Writing	❒	❒
c. Composing Written Material	❒	❒	j. Mobility	❒	❒
d. Computer Access	❒	❒	k. Positioning and Seating	❒	❒
e. Environmental Control	❒	❒	l. Reading	❒	❒
f. Hearing	❒	❒	m. Recreation & Leisure	❒	❒
g. Learning/Studying	❒	❒	n. Vision	❒	❒

2. Record currently used strategies or accommodations in Column A. Record currently used assistive technology in Column B.

3. If technology is needed to help the student perform this skill, to perform in the least restrictive environment, or to perform with less personal assistance complete Column C.

AT Consideration Record

Task	**A.** If currently completes task with special strategies/accommodations, describe.	**B.** If currently complete task with assistive technology tools, describe.	**C.** Describe new or additional assistive technology to be tried.

Does this student need assistive technology services? (Assistive technology services include additional evaluation, adapting or modifying the assistive technology, technical assistance on its operation or use, and training of student, staff, or family.) Describe what will be provided, the initiation date and duration: _____

_____

_____

Copyright Bowser, 1998

Student _____ Assistive Technology Consideration: Page _____ of _____

Task	**A.** If currently completes task with special strategies/accommodations, describe.	**B.** If currently complete task with assistive technology tools, describe.	**C.** Describe new or additional assistive technology to be tried.

Does this student need assistive technology services? (Assistive technology services include additional evaluation, adapting or modifying the assistive technology, technical assistance on its operation or use, and training of student, staff, or family.) Describe what will be provided, the initiation date and duration: _____
_____

Task	**A.** If currently completes task with special strategies/accommodations, describe.	**B.** If currently complete task with assistive technology tools, describe.	**C.** Describe new or additional assistive technology to be tried.

Does this student need assistive technology services? (Assistive technology services include additional evaluation, adapting or modifying the assistive technology, technical assistance on its operation or use, and training of student, staff, or family.) Describe what will be provided, the initiation date and duration: _____
_____

• *Our thanks to Wisconsin ATI and Gerogia Project for Assistive Technology* •

If the Team Needs Help with Consideration

Some teams need help to make a decision about a student's need for assistive technology. Generally this is because not enough information is available for the team to consider. Another reason consideration may be difficult is because there is disagreement among team members about how assistive technology will benefit the child. When either of these two cases arises, the best way to operate is for the team to develop a plan to try one or more assistive technology devices in the environments where the child needs them.

On the following pages is a form that teams may use to plan a trial period of one or more assistive technology devices. This form asks the team to discuss, ahead of time, the goals for the child's assistive technology use, the progress team members hope the child will make, and the results the team hopes to see during the trial. It is important to remember that a trial period is simply one way to collect more information about the child's performance and use of assistive technology. It is not likely that a child will become fully competent to use an assistive technology device during a trial period. However, a trial period can show the benefits and disadvantages of using a particular assistive technology device so that the team can make an informed decision about which tool or strategy to use.

Assistive Technology Extended Assessment Plan

Date of Extended Assessment Planning: _____

Student Data

Student Name: _____
Parent Name(s): _____
Parent Phone: _____
Parent Email: _____
Parent Address: _____
_____

Date of Birth: _____CA: _____
Disability: _____
IEP Date: _____
Medicaid ID# *(If applicable)* _____
Medical Diagnosis *(If applicable)* _____
Social Security #: _____
Grade/Placement:_____ Student #: _____
School: _____
School Address: _____
_____
School Phone: _____
School Fax: _____

Team Members

AT Extended Assessment Coordinator
Name: _____
Title: _____
Phone: _____
Email: _____

Other Team Members
Name:_____Title: _____
Phone: _____
Email: _____

Name:_____Title: _____
Phone: _____
Email: _____

Name:_____Title: _____
Phone: _____
Email: _____

Name:_____Title: _____
Phone: _____
Email: _____

Overall Goal for Device Use

What aspect of the student's performance do we hope will change?

_____
_____
_____

How will we collect information? (e.g., interview, product review, process observation, video)

_____
_____
_____

What level of achievement is reasonable to expect during the trial period?

_____
_____
_____

How will we know if the trial is not working (What criteria will we use to stop)?

_____
_____
_____

Bowser and Reed **• Copyright • October 2002: Permission to use is granted if credit is retained.**

Customary Environments Where Devices Will Be Used

1. Environment: _____
   Tasks: _____
   Person responsible for implementation: _____
   Days to be used: _____
   Times to be used: _____

2. Environment: _____
   Tasks: _____
   Person responsible for implementation: _____
   Days to be used: _____
   Times to be used: _____

3. Environment: _____
   Tasks: _____
   Person responsible for implementation: _____
   Days to be used: _____
   Times to be used: _____

Specific Devices For Trial

Device #1 _____

Date of trial Initiation:_____Minimum length of trial period: _____
Device trial review date:_____
Source of Device for Trial: _____
Contact person for technical assistance for trial: _____
Manufacturer:_____Manufacturer technical assistance number: _____
Comments: _____
_____

Device #2 _____

Date of trial initiation:_____Minimum length of trial period: _____
Device trial review date:_____
Source of device for trial: _____
Contact person for technical assistance for trial: _____
Manufacturer:_____Manufacturer technical assistance number: _____
Comments: _____
_____

Device #3 _____

Date of trial initiation:_____Minimum length of trial period: _____
Device trial review date:_____
Source of device for trial: _____
Contact person for technical assistance for trial: _____
Manufacturer:_____Manufacturer technical assistance number: _____
Comments: _____
_____

Bowser and Reed **• Copyright • October 2002: Permission to use is granted if credit is retained.**

Extended Assessment Summary

(To be completed at the end of the assessment)

How did the child's performance change when using the devices?

How did the student like using each device? Did the student prefer one of the devices?

What are the advantages of using the devices?

What are the disadvantages of using the devices?

How long can the child be expected to use the devices?

Extended Assessment Team Recommendation:

Bowser and Reed **• Copyright • October 2002: Permission to use is granted if credit is retained.**

Implementation

When an IEP team decides that a student needs assistive technology, that decision is only the beginning of all the things that need to be done in order for the student to be an effective assistive technology user. A great deal of planning takes place after the IEP meeting. The team must decide how, when and where the student will use assistive technology. A sequence of instruction must be developed so that everyone knows just how the student will learn to use the AT and how it will help overcome educational barriers. To make sure that a student's AT use is as valuable as possible, the team should develop an implementation plan.

AT planning can be facilitated if the team revisits the work that was done using the SETT process during the assessment. When a student begins to use a new tool, everything changes. The student develops new skills and abilities. The environment must be adapted to accommodate the AT. The tasks that the student is expected to do change.

The form on the following page can help the team to "Re-SETT" their plans for the student based on the student's use of new assistive technology devices.

Re-SETT for AT Implementation

Student _____ Date _____ AT Device _____

	Student	Environment	Tasks	Tools
Changes we anticipate due to the student's AT use				

SETT was developed by Joy Zabala, Educational Specialist: joy@joyzabala.com

If the Team Needs Help with Implementation

Sometimes planning for the implementation of an assistive technology program can be complicated. This is particularly true when the AT device is itself complicated or the student will need to use the device in a variety of environments. When the team needs help in planning for a student's use of assistive technology, they may want to call upon someone who has experience in teaching a student to use that particular device.

The form on the following page can help the team to discuss all the things that should be included in an effective implementation plan. The list of questions at the top of each page are meant to be a starting point to help team members think of the assistive technology services the student will need to do in order to ensure effective use of assistive technology.

Implementation Tools for the Team

Student: _____

Team Members:

_____
_____
_____
_____

Date of Plan: _____

Assistive Technology Device:

_____

Review Date: _____

_____
_____
_____

Support Task	Person(s) Responsible	Schedule	Evidence of Completion
Initial Student Training			
Ongoing Student Training			
Daily Regular Support of Student Use			
Staff Training			
Consultation with Staff			
Communication with Family			
Parent/Family Training			
Repairs and Modifications			

Copyright Gayl Bowser 5/2000
For permission to use contact gayl.bowser@douglasesd.k12.or.us

Student Training Questions to Consider

1. What will this student use the assistive technology device to do?
2. What specific technology use skills will the student need to learn?
3. How much training does the student require?
4. When will training be provided to the child?
5. How will the child learn to use the device in customary environments?
6. What kind of direct supervision and help will the child need in order to use the device in a functional manner?

Results of Team Discussion

Copyright Gayl Bowser 5/2000
For permission to use contact gayl.bowser@douglasesd.k12.or.us

Equipment Considerations

1. Who will provide the device and any consumable supplies needed?
2. In what environments will the child use the assistive technology?
3. How will the device be made available in each environment (i.e. move with the child, child will go to the device, on request)
4. Where will the device be located when the child uses it?
5. Will the student need to use this device at home? If no, will an alternative device be needed?
6. Will adaptations or modifications to the device be needed to help the student access the device?
7. Who will be responsible for device repairs?

Results of Team Discussion

Copyright Gayl Bowser 5/2000
For permission to use contact gayl.bowser@douglasesd.k12.or.us

Staff and Family Training Questions

1. Which adults in the child's environments will require training in the use of the device?
2. What will various staff and family members need to know about the device and how it works?
3. Who will provide the needed training for these people?
4. Who should be called if technical assistance is needed?

Results of Team Discussion

Copyright Gayl Bowser 5/2000
For permission to use contact gayl.bowser@douglasesd.k12.or.us

Periodic Review

IEP teams are required to review the student's plan at least annually to make sure that the student is able to meet the educational goals and short term objectives that were set during the IEP meeting. When teams meet to review a child's progress toward meeting goals, they should review the student's progress in learning to use assistive technology.

There are several aspects to developing competence in AT use. Using the following framework, a team can look at a student's AT competence from four different perspectives: (Adapted from Light, & Binger, p.2)

Operational Competence: Operational competence describes whether the student has learned to make the device work. Can the student turn it on? Can the student make it do the things that it was designed to do? How well can the student operate the device?

Functional Competence: Functional competence describes how well the student is able to use the device to overcome educational barriers. If the student uses a portable word processor for writing, has the student's writing improved? If the student uses an augmentative communication device to talk to friends, are friends better able to understand what the student has to say? How does the assistive technology device help the student with functional life skills?

Strategic Competence: Strategic competence describes whether the student understands when to use the AT device. Is the device used for all writing or only for longer written assignments? Does the student actually use the augmentative communication device to get attention when a gesture will not work? Does the student know when the device will be helpful and when some other approach to eliminating the barrier should be applied?

Social Competence: Social competence describes how a student uses the assistive technology device around other people. Is the student able to explain how the device makes communication possible? Does the device restrict social interaction in any way? If it does, what does the student do to overcome this AT-imposed barrier? How does the device help the student in social and real-world contexts?

The form on the following page can be used by teams as they review the student's progress in learning to use AT to overcome barriers in real world settings. This information can be used to revise the AT plan or to add new goals and short term objectives as the student is ready to gain additional competence.

Aspects of Assistive Technology Competence

Operational Competence: How to work it

Functional Competence: What to do with it

Strategic Competence: When to use it and when not to use it

Social Competence: How to use in a social and real-world context

For further information, contact Gayl Bowser: gayl.bowser@douglasesd.k12.or..us

If the Team Needs Help With Periodic Review

Sometimes when the team makes an implementation plan, things don't go as well as they had hoped. When this happens, it is a good idea to collect additional data regarding the student's use of AT.

There are really only four ways to collect data.

1. The team can interview the student or the people in the student's environment and ask what is going on.

2. The team can look at products (like written work or language samples) created by the student and evaluate the quality of the product.

3. The team can observe the student. If observation is used data can either be anecdotal (gives a description of what happened) or event recording (tracks each event as it happened and shows how different conditions affect the student's performance).

4. The team can use video or audio tape so that the student can watch the tape and talk about what happened. Video and audio recordings are really a combination of the other three data collection strategies. Video and audio recording has the benefit of allowing for detailed analysis of the student's performance

On the following page is a chart developed by Penny Reed, Gayl Bowser and Jane Korsten, which can help the team decide what kind of data is needed to complete effective review of the child's assistive technology program. For more detailed information about data collection for assistive technology the team can use the manual *How Do You Know It? How Can You Show It?* See the References section of this manual for information.

THINKING ABOUT DATA

Type of Information	Conditions	Potential Data
Interview	Student is able to provide needed information and/or it is not observable	Preferences, feelings, intentions, significant features
Product Review	Time and opportunities to respond are constant Time is constant (or not important) and opportunities vary Time varies or time and opportunities vary	Number of correct responses Percentage of correct responses Rate of correct responses
Observation		
Anecdotal	Event occurs only infrequently or specific “action” has not been identified	General information, related factors, number of occurrences
Event Recording	Time and opportunities to respond are constant Time is constant (or not important) and opportunities vary Time varies or time and opportunities vary	Number of occurrences Percentage of occurrences Rate of occurrences
Video or Audio Tape	Very detailed behavior needs to be analyzed or compared over time or analyzed in several different ways	Rate, type of change, subtle changes

(Reed, Bowser & Korsten, 2002)

APPENDIX

- Frequently Asked Questions
- Sample District Policy for
  - Provision of Assistive Technology, for
  - Use at Home, and for
  - Transfer of Equipment
- Sample Position Description
- Assistive Technology Specialist Competencies
- Use Agreement for Long-term Equipment Loan
  - Portland Public Schools
  - Eugene School District

Frequently Asked Questions

1. **What is assistive technology?**
   Assistive technology is any item that a child uses to increase, maintain or improve, a functional capability. Technology may be used in many ways which do not change a child's ability to function. For example, a computer program which only helps a child to practice math facts would generally not be considered assistive technology because the child would not be able to do the math better as a result of using the technology. A calculator used by the same child would probably be considered assistive technology.

2. **What kinds of assistive technology devices are considered by the IEP team?**
   Many commonly used products can be used as assistive technology supports for students with disabilities. Examples of low-tech solutions include calculators, laminated communication boards, tape recorders, pencil grips and spell checkers. In addition, there are over two thousand specialized assistive technology devices which are specifically designed to enhance the functional skills of people with disabilities. A full range of assistive technology devices should be considered for each individual. As a rule, the simplest tool that will fill the need is the most effective.

3. **Who is eligible for assistive technology?**
   All students with disabilities, both students who receive services under IDEA and those who need accommodations and modifications under Section 504 of the Rehabilitation Act, are eligible to receive assistive technology if it is needed for the child to meet educational goals. Need is determined if the student cannot receive a free and appropriate public education (FAPE) in the least restrictive environment (LRE) without the use of assistive technology. Infants and toddlers younger than three years of age who are enrolled in Early Intervention Programs are also eligible to receive assistive technology devices and services if they are needed for the child to meet developmental goals.

4. **What factors should an IEP team take into consideration to determine an individual child's need for assistive technology?**
   When a team considers a child's need for assistive technology, team members should first review the child's goals and need for access to the curriculum. If the team identifies an area of performance where progress will be difficult or impossible because of the child's disability, the team should consider assistive technology along with other strategies such as modification of the task (e.g. shortened assignments, dictation of written work) or additional instruction.

5. **When should a team evaluate a student's assistive technology needs?**
   Any time a student seems to have the cognitive skills to complete a task but encounters barriers because of the disability an assistive technology assessment

may be indicated. If any member of the team identifies a task or functional life skill for which the student may need assistive technology, the team should examine the strategies and accommodations already in place for the student. If these strategies and accommodations are not sufficient to allow the student to overcome barriers, an assistive technology assessment is warranted.

6. **What are assistive technology services?**
   IDEA specifically list six assistive technology services. All of these services are actions which are required to help a child with a disability to select and effectively use assistive technology. Assistive technology services listed in IDEA include assessment, provision of assistive technology selection and maintenance of devices, coordination with other therapies, training of students and families and training of professionals.

7. **Who is qualified to complete an assistive technology assessment?**
   Assistive technology assessments should involve all members of the child's educational team. IDEA states that evaluation of the child's assistive technology needs should include a "functional evaluation in the child's customary environment." When an assistive technology assessment is conducted, at least one member of the child's team must have knowledge about the assistive technology devices and services which the child could use to complete the tasks identified in the assessment. In some cases, the IEP team may have enough information to complete the assessment without help. When the team requires additional information about assistive technology, the services of an assistive technology specialist or other knowledgeable person may be needed.

8. **What information should be gathered during an assistive technology assessment?**
   During an assistive technology assessment, the team should gather information about the student's present level of educational performance, the tasks the student needs to accomplish and the environments where those tasks need to be done. The assessment should consider tools and strategies to help the student with the identified tasks including low level technology solutions and non-technology strategies, as well as high-tech devices. In most cases, a trial period of use of the most promising technology solution(s) in the child's customary environments should also be implemented.

9. **What should an IEP team do when members agree that a child may need assistive technology but are not sure what is available?**
   When the IEP team identifies tasks for which the child may need assistive technology, but does not have enough information to make a decision about what that technology should be, the team may add additional team members who are knowledgeable about technology which can be used for those tasks. A formal assistive technology assessment may be conducted. When an assistive technology assessment is initiated, the team should develop a plan for how the assessment will be conducted so that it can be completed within the sixty day timeline required by Oregon Administrative Rules (OARs). Once the assessment is complete, the IEP team should meet again to consider the child's needs for assistive technology.

10. **When an outside expert recommends assistive technology, must the education agency provide it?**
    The IEP team is required to consider all available information when planning a child's specially designed instruction. If an outside expert recommends a particular assistive technology device for a child, it is important that the team consider this recommendation along with all other information about the child. IDEA states that an assistive technology evaluation includes a "functional evaluation in the child's customary environment." If the student has not used the assistive technology recommended by an outside expert in the customary environment, it is advisable for the team to plan for this trial before determining the child's need for the recommended device.

11. **Do children with learning disabilities need assistive technology?**
    IDEA requires that every IEP team consider a child's need for assistive technology. This includes the IEP teams of children with learning disabilities. Students with learning disabilities often use assistive technology to help them read or write. Some common assistive technology tools used by students with learning disabilities include spell checkers, calculators, portable word processors, talking word processing programs and word prediction software.

12. **What documentation is required when a team considers assistive technology and determines that it is needed in a child's educational program? What documentation is required when a team considers assistive technology and determines that it is not needed in a child's educational program?**
    IDEA requires that every IEP team consider a child's need for assistive technology, but the law does not mandate specific documentation regarding that team's consideration. Oregon standard IEP and IFSP forms provide a check box for teams to use during an IEP or IFSP meeting to document that assistive technology was considered. If the team decides that the child needs assistive technology, that technology should appear elsewhere in the IEP as special education, related services and/or supplemental aids and services. While it is not required, teams may also want to document the basis for their decisions when assistive technology is considered but is not needed by the child. This is especially true when one or more team member disagrees with the team decision.

13. **Where should needed assistive technology devices and services be described in the IEP/IFSP?**
    IDEA states that assistive technology can be considered as special education, related services or supplemental aids and services. Neither IDEA or Oregon rules specify how assistive technology devices and services should be listed in a student's plan. School districts may develop operating guidelines that may help IEP teams to include assistive technology in IEP's and IFSP's. No matter how the devices and services are listed, it is important that everyone who reads the plan is able to understand the team's intent in providing assistive technology devices and services.

14. Should specific assistive technology devices be named in the IEP/IFSP?

In most cases, the features of an assistive technology device rather than the specific device name should be described in the IEP/IFSP. This allows for more flexibility if the student moves to another district or if the IEP team discovers that a device similar to the one initially considered better meets the student's needs. In rare cases, the team may name a specific assistive technology device in the child's plan. This is generally necessary when the child is required to learn unique ways to operate the device that cannot be generalized to other similar devices.

15. When assistive technology is listed as needed on the IEP, must that technology be available in all classes?

Students generally use assistive technology to accomplish specific tasks that they would find difficult or impossible to accomplish without it. The IEP team should describe the conditions under which the child needs assistive technology. This might be done in the statement of Present Level of Educational Performance (PLEP), as a condition in goals and objectives, or in the description of the child's accommodations and modifications. The assistive technology should then be made available to the student as described in the IEP.

16. Can students use their assistive technology while doing state and district performance assessments?

Each IEP team must determine how a child will participate in state assessments and what accommodations and modifications that child will need in order to participate. Oregon's state assessment administration manuals list those accommodations which are considered standard assessment and also describe modified assessment procedures. In some cases, assistive technology may only be used in standard state assessments if it is listed as needed for the assessment on the child's IEP. The IEP team should consult the state assessment administration manual when a child is an assistive technology user. When children take state assessments under modified assessment conditions, their ability to obtain a Certificate of Initial Mastery (CIM) may be affected.

17. What should the IEP team consider when determining whether assistive technology is needed in the child's home or other environments?

The purpose of providing assistive technology in the home is to make sure that the child is able to meet the specially designed goals developed by the IEP team. When considering the child's need for assistive technology in the home, the IEP team should review the child's IEP goals and objectives. If assistive technology provided at school is needed at home in order for the child to make progress on those goals, the team should make arrangements for it to be used in the home. In some cases the team may decide to provide an alternative assistive technology device in the home setting or to provide additional opportunities for the child to complete needed activities at school as an alternative.

18. What if an assistive technology device is sent home and damaged?
Parents can not be charged for use and normal wear and tear of assistive technology devices. In Oregon, school districts may make policies regarding the parent's responsibility for equipment damaged due to misuse or neglect. When developing such a policy, it is recommended that education agencies refer to their policies for loaning students other equipment such as scientific calculators and football uniforms.

19. If a team decides that a child needs assistive technology, who is responsible to purchase it?
The Local Education Agency (LEA) has final responsibility to provide all parts of a child's educational program as listed on the IEP. In some cases LEA's make agreements with other programs (e.g. Education Service Districts, Regional Programs) to help provide the assistive technology that a child needs. LEA's may also look to other sources of funding such as insurance, charitable organizations and grants to help provide the assistive technology a child needs.

20. Once assistive technology is included in a child's educational program, what actions should be taken to make sure that assistive technology use is successful?
As with any other educational activity, the inclusion of assistive technology in a child's IEP is only the beginning. The educational team which serves the child must plan for training of the child, the child's family and educators who will need to know how the technology works. Plans must also be developed for assuring the child's regular use of the technology as indicated in the IEP.

21. If an education agency purchases assistive technology for a specific child, who does the technology belong to?
If an education agency purchases assistive technology, the technology is the property of that agency. It is often desirable that a child's technology be the property of the child and family. When this is the case, LEA's may assist the family in obtaining funding from a source such as medical insurance or a charitable organization if such funding is available.

22. Who is responsible for maintaining assistive technology devices? What if the device belongs to the child?
If assistive technology is included on a child's IEP, the education agency must assure that it is available to the child. If assistive technology requires repair or maintenance, the LEA must ensure that an alternative device is made available to the child as described in the IEP. This is true even when the device belongs to the child's family. In some cases, the LEA may choose to repair a device belonging to the child as an alternative to the purchase of a duplicate device.

23. What is the education agency's responsibility if the IEP of a transferring student includes assistive technology that the district does not own?
When a student enters a district with a current IEP from another agency, the receiving district must review the entire IEP to determine whether it is appropriate in the new setting. Any assistive technology devices or services

included on the IEP must be reviewed to determine whether they are still appropriate in the new educational environment. If the program designed for the student is still appropriate, then the education agency has a responsibility to provide the assistive technology devices and services listed on the IEP. If a change in the assistive technology portion of the IEP is warranted, the district must reconvene the IEP team and make the appropriate changes in the child's educational program.

24. How can educational agencies budget for assistive technology when it is impossible to predict the needs of new students?

District personnel who are responsible for developing a budget which includes funds for the purchase of assistive technology may need to collect information from a variety of sources. Educators who work with assistive technology users may be able to predict the need for future expenditures. Discussion about assistive technology needs should be part of the conversation whenever a child transfers from one educational setting to another and this discussion can help administrators plan for future expenditures. As with any other school expense, a contingency should be planned in the case of unexpected assistive technology needs.

25. Are students who have plans under Section 504 of the Rehabilitation Act eligible for assistive technology? If so, who is responsible for providing this technology?

Students who have Section 504 Plans may be eligible for assistive technology devices and services if they are needed for the student's access to the general curriculum. When a student's 504 Plan includes assistive technology it is the responsibility of the 504 Coordinator and the student's general education team to make sure that these devices and services are provided.

26. If a family requests an independent educational evaluation for a student, what steps should the education agency take?

Families have the right to an Independent Educational Evaluation (IEE) when they disagree with the results of the education agency's evaluation. This is true for assistive technology evaluations as well as other IEEs. If a family requests an independent educational evaluation, the agency must provide a list of qualified examiners. The family chooses a person to complete the assistive technology evaluation from this list. The evaluation is provided at the district's expense. If the family of a student with a disability requests an Independent Educational Evaluation, refer the family to the agency's Director of Special Education.

Sample District Policies

Policy For the Provision of Assistive Technology
The district ensures that assistive technology devices or assistive technology services, or both, are made available if they are identified as part of the student's IEP. These services and/or devices may be part of the student's special education, related services or supplementary aids and services.

Policy For Use at Home
On a case-by-case basis, the district permits the use of district-purchased assistive technology devices in the student's home or in other settings if the student's IEP team determines that the student needs access to those devices to receive a free appropriate public education. In these situations, parents are liable for loss, theft or damage due to negligence or misuse of the devices.

Policy For Transfer of Equipment
When the student is no longer eligible for special education services in the district, including moving to another school district, the assistive technology devices will be returned to the district.

Sample Position Description Assistive Technology Specialist

Position: *Assistive Technology Specialist*
Responsible To: *Director of Special Education*

1. Bachelors degree with major in Special Education, Speech and Language Therapy, Occupational Therapy or related field.

2. Five or more years of experience providing direct services in the area of assistive technology. Preference is given to individuals who have an AT credential from a college or university.

3. Recent experience performing functional assistive technology assessments in a school setting and knowledge of how to integrate assistive technology use into curriculum and functional life skills.

4. Knowledge of a wide range of assistive technology devices such as computer software, augmentative communication devices, low tech assistive technology tools and technology for hearing and vision disabilities as well as hands-on experience with these devices.

5. Computer skills in both Macintosh and Windows platforms including the ability to complete basic troubleshooting and repairs of both platforms.

6. Demonstrated skill in consultation and collaboration with a variety of IEP and IFSP teams.

7. Demonstrated skill in written and oral communication.

8. Experience designing and delivering professional development opportunities.

Responsibilities:

1. Support IEP/IFSP teams in completing assistive technology assessments.

2. Provide technical assistance and support in integrating assistive technology to school personnel.

3. Provide technical assistance and support in integrating assistive technology to families and care providers.

4. Troubleshoot technical difficulties and provide technical assistance and basic maintenance for assistive technology devices.

5. Participate as a team member when IEP/IFSP teams need additional expertise to consider and implement assistive technology programs.

Assistive Technology Specialist
Essential Knowledge and Skill Competencies

Philosophical, Historical, and Legal Foundations of Special Education
Knowledge
1. Legislation and regulations related to technology and their implications for special education.

Skills
2. Articulate a philosophy and goals for using technology in special education.
3. Use technology-related terminology appropriately in written and oral communications.

Characteristics of Learners
Knowledge
4. Characteristics of exceptional learners that influence the use of technology.
5. Impact of technology on exceptional learners.
6. Impact of technology on exceptional learners with moderate disabilities.

Skills
7. Identify the academic and physical demands placed on the student by computer software and related technology materials.

Assessment, Diagnosis, and Evaluation
Skills
8. Analyze, summarize, and report student performance data to aid instructional decision-making regarding technology.
9. Identify functional needs, screen for functional limitations, and identify if the need for a comprehensive assistive technology evaluation exists.
10. Refer for additional evaluation regarding technology if adequate data is not available for plan development.
11. Recognize the need for further evaluation regarding technology, and refer to other professionals when appropriate.
12. Recognize poor outcomes regarding technology needs, and evaluate and reinitiate the process as needed.
13. Work with assistive technology team members to identify assistive technologies, both hardware and software, that can help individuals meet the demands placed upon them in their environments.
14. Define measurable objectives to monitor progress toward achieving stated goals regarding technology.
15. Observe and measure consumer's performance with the assistive technology after a period of initial use.
16. Compare actual performance with anticipated performance and the goals stated in the intervention plan.
17. Interview the consumer, the family, and caregivers to determine if the technology solution meets their present and future needs.

Instructional Content and Practice
Knowledge
18. Procedures for evaluating computer software and other technology materials for their potential application in special education programs.

Skills
19. Identify elements of the special education curriculum for which technology applications are appropriate and ways they can be implemented.
20. Design, deliver, and assess student learning activities that integrate computers/technology for a variety of student populations.
21. Design student learning activities that foster equitable, ethical, and legal use of technology by students.
22. Identify and operate software that meets educational objectives for students in multiple educational environments.
23. Use computers to support various stages of the learning process and to facilitate student reporting of educational achievements.

Assistive Technology Specialist Essential Knowledge and Skill Competencies (continued)

Skills (continued)

24. Use technology to compensate for learning and performance barriers.
25. Identify and use assistive technologies that can provide access to educational materials that are otherwise inaccessible to some individuals.
26. Use computer-based productivity tools to develop classroom materials.
27. Teach special educational students to use productivity software programs to perform tasks such as word processing, database management, graphics production and telecommunications.
28. Teach special education students to operate equipment and run associated educational programs.
29. Use productivity tools for word processing, database management and spreadsheet applications.
30. Solicit accurate feedback from end-users and others having experience with technology.
31. Understand proper mechanical and electrical safety practices, or direct their use in the assembly and integration of the technology at defensible level of competence.

Planning and Managing the Teaching and Learning Environment

Skills

32. Demonstrate the proper care of technology systems and related software; use simple diagnostics to determine problems that arise, and perform routine maintenance.
33. Arrange and manage the classroom environment to facilitate the use of technology.

Managing Student Behavior and Social Interaction Skills

Skills

34. Organize computer activities to promote positive social interaction.

Communication and Collaborative Partnerships

Knowledge

35. Roles that related services personnel assume in providing technology services to special education students.

Skills

36. Recognize the need (how, when, where) to refer a consumer to another professional regarding technology.
37. Identify assistive technology team members and their roles.
38. Design and implement integrated technology classroom activities that involve teaming and/or small group collaboration.
39. Collaborate with consumer and other team members in planning and implementing the use of assistive and adaptive devices.
40. Participate in collaborative projects and activities involving technology.
41. Demonstrate effective group process skills.
42. Communicate effectively including listening, speaking, and writing on technology issues.
43. Use electronic mail and Web browser applications for communication and for research to support instruction.
44. Advise general education teachers about the use of technology systems with special education students who are mainstreamed in to their classes.

Professionalism and Ethical Practices

Knowledge

45. Confidentiality of information.
46. Limits of expertise - recognize and see outside expertise.

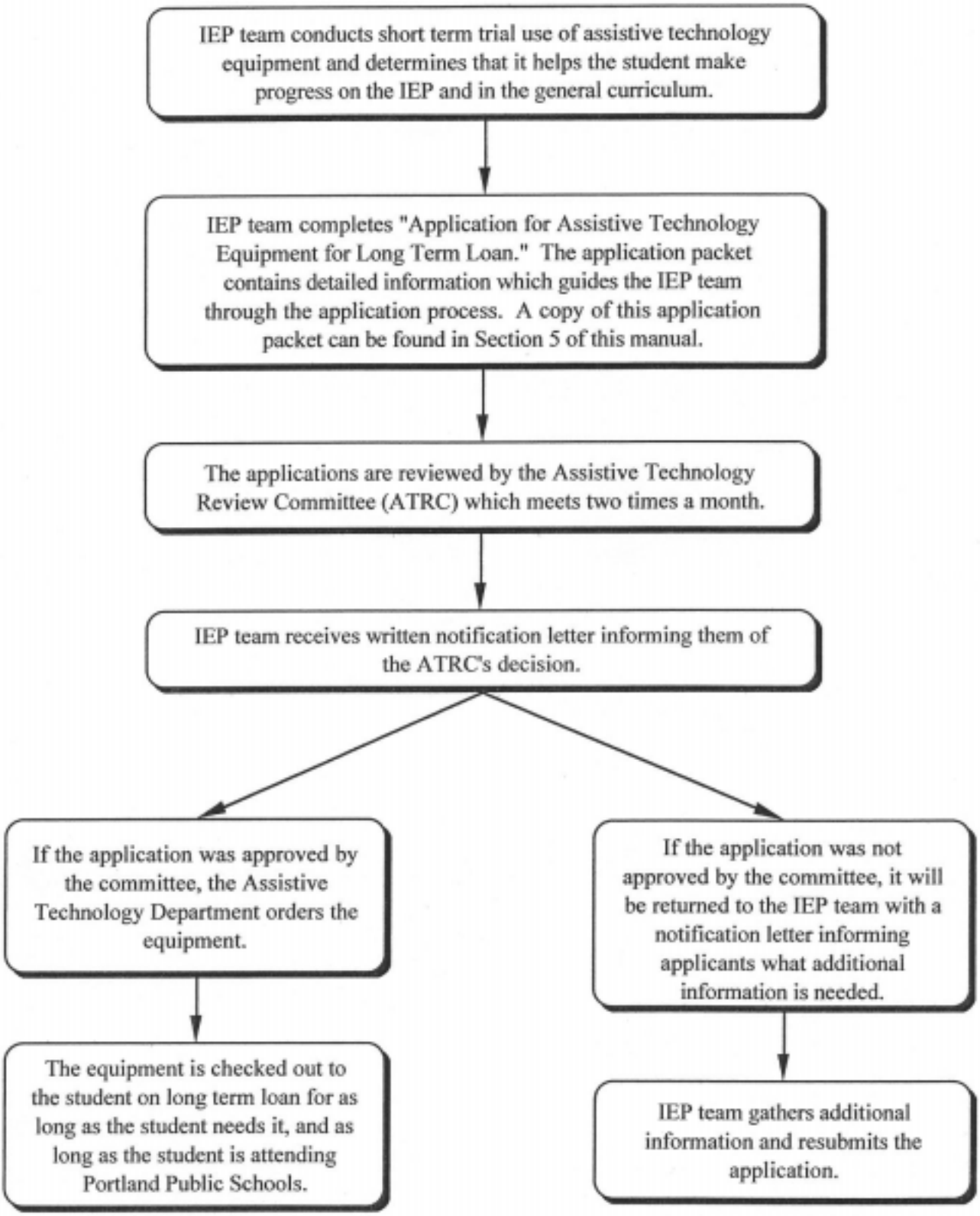
Skills

47. Recognize own skills and knowledge regarding technology and limit individual practice accordingly.
48. Maintain a professional development program to ensure the acquisition of knowledge and skills about new developments in technology as they become available.
49. Identify activities and resources to support professional growth related to technology.
50. Demonstrate knowledge of equity, ethical, legal, and human issues related to technology use in special education.
51. Adhere to copyright laws about duplication and distribution of software and other copyrighted technology materials.

Use Agreement for
Long Term Equipment Loan

ACQUISITION OF ASSISTIVE TECHNOLOGY EQUIPMENT-LONG TERM LOAN

A Quick Reference



Portland Public Schools Assistive Technology

Portland Public Schools
Department of Special Education

Assistive Technology Equipment For Long Term Loan Application Questions

Please answer the following questions thoroughly.

1. **Specifically** describe the student's strengths and limitations in the instructional area(s) related to this request (for example, written language, reading, math, and science).

2. Describe alternative strategies that have been used with the student to address this instructional area(s). Please list specific strategies and the results. Include all adaptations and modifications that have been tried.

3. Describe how the desired equipment will enhance the student's educational performance and relate to IEP goals. Provide **data and work samples** documenting the effectiveness of the trial use of the equipment. Include the following information about each sample, in order to demonstrate the student's abilities with and without the technology requested:
   - Description of the task.
   - Level of independence in task completion.
   - Time it took the student to complete the task.
   - Time it took an average peer to complete the same task.
   - Handwriting and typing speed samples (indicate if these samples are copied text or original student writing).
   - Other data appropriate to the request.

4. Include the following information when applicable:
   - Durability of equipment
   - Portability of equipment
   - Compatibility with home equipment
   - Student's ability to care for and maintain equipment
   - Description of how the equipment will be used throughout the day

5. Describe the plan for training the student, support staff, and family in the use of this assistive technology. Identify staff responsible for on-going assessment as well as care and maintenance of the equipment.

Portland Public Schools
Department of Special Educaton

Application for Assistive Technology Equipment for Long Term Loan

Student Name: _____ **Date of Application:** _____

Birthdate: _____ **Applicant Name:** _____

School/Grade: _____ **Discipline:** _____

Eligibility(ies): _____ **Phone/Voicemail:** _____

PPS ID #: _____ **Teacher/Case Mngr:** _____

Current Placement (Circle all that apply):
Regular Education Self-Contained Classroom Resource Room Other_____

Names and discipline of related service providers:

_____

Instructional or access area(s) for which the item/equipment is requested:

_____

Length of Trial Use of Equipment (Please be specific):

_____

Equipment requested:

_____

_____

Total Price: _____

Is the IEP team in agreement about this application? _____Yes _____No

Signature of Supervisor _____ **Date**_____

Please specifically state your rationale for every piece of equipment.
All equipment must have a trial period.

Send completed application to the Assistive Technology Office, Child Services Center.

Portland Public Schools Assistive Technology

Eugene School District 4J
Equipment Use Agreement

School District 4J will provide short term use of assistive technology equipment to students during instructional and/or non-instructional hours. A current Individualized Education Program, or Section 504 Personal Education Plan must identify the student's need for assistive technology equipment.

The school district will:
• assure that the equipment is in working order when loaned to student.
• provide training to staff, student or family on maintenance and programming of equipment.
• be available to problem solve during the period of approved use.
• maintain records of all equipment and replacement costs.
• assume financial responsibility for routine maintenance costs of equipment (e.g., battery replacements, repair due to normal use, software upgrades, etc.)

The parent/family of student will:
• take necessary precautions to avoid theft, damage, and loss of equipment.
• assure that maintenance and programming instructions are followed.
• assume financial responsibility for replacement of lost or stolen equipment.
• assume financial responsibility for repair of damaged equipment.
• assume responsibility for picking up and returning equipment to designated site.

If the equipment, hardware, and/or software needs repair or replacement due to normal use I agree to contact_____ Phone_____

Items check out:		**Anticipated dates equipment needed:**
1._____	ID#_____	From_____To_____
2._____	ID#_____	From_____To_____
3._____	ID#_____	From_____To_____
4._____	ID#_____	From_____To_____
5._____	ID#_____	From_____To_____
6._____	ID#_____	From_____To_____

I have read this loan agreement and understand my responsibilities.

Borrower (print name) _____ (signature) _____
Student name_____ School_____
Address _____
Phone (home) _____ (work) _____
Check out date _____ Return date _____ Return location _____
4J Contact Person _____Phone _____
Checked out by _____ Received by_____

References

Bowser, G. & Reed, P., (1998). *Education Tech Points: A Framework for Assistive Technology Planning,* Coalition for Assistive Technology in Oregon, Winchester, OR.

Eugene School District 4J Educational Support Services, (2001). Assistive Technology Services and Devices: Information Packet, Eugene School District 4J, Eugene, OR.

Lahm, Elizabeth A. & Beverly L. Nickels, (Sept/Oct 1999). "Assistive Technology Competencies for Special Educators", TEACHING Exceptional Children, pp 56-63 Charlotte, NC.

Light, J. & Benger, C., (1998) *Building Communicative Competence with Individuals Who Use Alternative and Augmentative Communication,* Paul Brooks Publishing Company, Baltimore, MD

Los Angeles Unified School District, (2000). *Guidance for the IEP team…determining services based on assessed needs: Assistive Technology Guidelines,* Los Angeles Unified School District, Los Angeles, CA.

Los Angeles Unified School District, (2000). *Special Education Compliance Guide,* Los Angeles Unified School District, Los Angeles, CA, p IV-G-1 to IV-G- 11.

Portland Public Schools, (2002). Assistive Technology Manual, Portland Public Schools, Portland, OR.

Reed, P., Bowser, G. & Korsten, J., (2002). *How Do You Know It? How Can You Show It?*, Coalition for Assistive Technology In Oregon, Winchester, OR.

Reed, P. & Bowser, G., (1999). "Implementing the Assistive Technology Requirements of IDEA", Council for Exceptional Children Conference, Charlotte, NC.

Zabala, J.,(1995) The SETT Framework: Critical Areas to Consider When Making Informed Assistive Technology Decisions. www.joyzabala.com