

Referral Phase: Data Collection Checklist

PURPOSE

This tool distinguishes between the data needed for Tier 2 versus Tier 3 support and provides educators with the rationale for using each data component to drive the intervention planning process.

DIRECTIONS:

Use this tool as part of the referral process, in order to select a variety of data that represents a holistic picture of the student and their need(s). Leverage the checklist to indicate the data you will collect and present.

Basic Information

Student Name: _____ **Date:** _____ **Referral:** ☐ Tier 2 ☐ Tier 2 to Tier 3 ☐ Direct to Tier 3

Referral Data

Data Type:	Rationale:
<input type="checkbox"/> Assessment data <i>(Academic testing, social/emotional assessments, psychological testing, OT/PT evaluations and outcomes)</i> [Required for T3]	This data is needed to further define any factors that may be contributing to the student's presenting concern and will help determine the appropriate pathway to address a student's needs. This data is only required for Tier 3 supports if it has already been collected.
<input type="checkbox"/> Attendance data <i>(Current and previous years)</i> [Required for T2 and T3]	Attendance data is required in order to discuss attendance trends and to consider whether or not lack of attendance has contributed to the presenting concern.
<input type="checkbox"/> Communication logs with family [Required for T2 and T3]	This data informs the Student Support Team of all contact with family members/caregivers and gives a deeper understanding of the family awareness and involvement in addressing the presenting concerns.
<input type="checkbox"/> Current grades/report card [Required for T2 and T3]	Data from report cards/grades allows the Student Support Team to assess how the student is performing in all subject areas in order to identify specific areas of strength and growth, and to further assess the role of academics in the presenting concern.
<input type="checkbox"/> Documentation of outside services	This data allows the team to document participation in additional, often outside services (e.g., counseling), to determine the efficacy of these supports and how they might work in combination with other in-school interventions.
<input type="checkbox"/> Discipline referrals/suspension data [Required for T2 and T3]	This data will provide the team with a clear picture of the behaviors that the student is exhibiting, how often, and consequences the student has received.
<input type="checkbox"/> IEP/504 <i>(Depending on district and school policy)</i>	This data is needed so that the team is aware of any disabilities/medical concerns and all current services and interventions the student already receives.
<input type="checkbox"/> Medical reports <i>(Vision, hearing, other)</i>	Medical data is needed to identify any additional factors that may be contributing to the presenting concern.
<input type="checkbox"/> Observational data and anecdotal records [Required for T2 and T3] <i>(Classroom and elsewhere)</i>	This data provides a real-time picture of the student in context. The student should be observed in the referring teacher's class, and the date, time and description of observation should be noted and submitted with the referral.

<input type="checkbox"/> Prior interventions and outcomes <i>[Required for T2 and T3]</i>	This data will provide the team with insight into what interventions have already been implemented with limited or no success and need to be altered.
<input type="checkbox"/> Referral form <i>[Required for T2 and T3]</i>	Teacher completes a referral form to indicate area(s) of concern in an effort to schedule a meeting with either Tier 2 team, Student Support/other service provider or Tier 3 Team. This data is required to provide an overview of the presenting concerns.
<input type="checkbox"/> Samples of student work <i>[Required for T2 and T3]</i>	This data provides a concrete representation of student work as it relates to the concern.
<input type="checkbox"/> Standardized test scores	This data provides an understanding of how the student is performing academically in comparison to his/her peers in the same grade level.
<input type="checkbox"/> Caregiver interview <i>[Required for T3]</i>	This data <i>(collected if caregiver is unable to attend)</i> is needed so that the team can have an appraisal of factors outside of the school environment that may support or impede a student's ability to learn and function optimally in school, as well as assets that may be leveraged for support. Family history, current family dynamics, and home and community environment play critical roles in determining a child's well-being.
<input type="checkbox"/> Student schedule	This data allows Student Support Team members to identify any patterns of need in particular classes, with particular teachers and students, or during certain times.
<input type="checkbox"/> Universal wellness screeners	This data can be used to determine if the student needs additional support outside of academic deficiencies.
<input type="checkbox"/> Turnaround for Children's Well-Being Index	This data allows educators to bring student voice into the fold. Real-time data about how students are feeling and functioning is gathered via a student self-assessment. It captures a holistic view of each student's perception of their physical, social and emotional health. Educators can hear directly, quickly and frequently about student well-being to inform their holistic understanding about each student.
<input type="checkbox"/> Other:	<i>Rationale:</i>
<input type="checkbox"/> Other:	<i>Rationale:</i>