



# 6 Periodic Review

Periodic review is the regularly scheduled review of a student's progress in all areas. IDEA requires that the IEP team review a student's progress toward meeting educational goals at least once annually. During periodic review, IEP teams analyze data about student performance and adjust the specially designed instruction, related services and accommodations and modifications based on the results of this analysis.

Assistive technology use should be reviewed at least as often as other aspects of the student's educational program. During periodic review the team asks questions about the quality, frequency and effectiveness of a student's AT use. If needed instruction about AT, the AT services that support the student's AT use and/or the technology itself is adjusted based on the results of the review.

## STUDENT CENTERED QUESTIONS

- Are the AT devices that were provided being used as described in the IEP?
- Are the AT services that were described in the IEP being provided?
- Are the AT devices and/or services functioning as expected?
- What change in the student's performance has occurred as a result of using the AT?
- Are changes in the student's program of AT use needed?

## ACTIONS FOR THE STUDENT'S TEAM

- Review student performance data that includes the use of assistive technology.
- Determine changes that may be needed in the plan for assistive technology use.
- Evaluate the adequacy of the current information used to revise the AT implementation plan.
- Assign persons responsible for data collection if new information is needed.

## IMPLICATIONS FOR DISTRICTS

- Professional development should include data analysis strategies that enable educators to adjust the student's program of AT use.
- Staff training is needed that describes the district's procedures for making changes to the IEP if AT does not work as expected.
- Equipment should be made available for trial periods when data indicates that a student needs new AT.

## **EDUCATION TECH POINT #6: PERIODIC REVIEW**

As with other Education Tech Points, periodic review of progress toward IEP/IFSP goals is mandated in IDEA. Periodic review for assistive technology is the point at which team members ask questions such as "Are we on the right track?" and "Is the student accomplishing what we hoped?"

While annual review of a child's progress is required by IDEA, there are also reasons for progress reviews on other occasions. For example, there is a requirement in IDEA that a child's progress must be reported to parents at least as often as the progress of non-disabled children. The IEP/IFSP team must determine "How the child's parents will be regularly informed (by such means as periodic report cards), at least as often as parents are informed of their non-disabled children's progress (34 CFR §300.347(a)(7)(ii)).

If the IEP/IFSP team suspects, during initial planning that some part of the assistive technology plan might not work easily, the team may choose to build in more frequent reviews to ensure success. It is especially useful to review progress frequently during the initial stages of the child's assistive technology use. Such reviews should be data based and include performance indicators as well as anecdotal reports and student-created products.

Once a child's assistive technology use is established, there may also be a need for a more reflective type of review that considers not only the immediate student characteristics, tasks and environments but also the long term goal for a child's assistive technology use. Information about how assistive technology has helped the child to do new tasks will enable the team to modify plans for future goals and establish any needed short term objectives or benchmarks to address new performance.

**STUDENT CENTERED QUESTIONS** The educational team can use questions like following ones as they review a child's progress in achieving goals while using assistive technology.

- Are the AT devices that were provided being used as described in the IEP?
- Are the AT services that were described in the IEP being provided?
- Are the AT devices and/or services functioning as expected?
- What change in the student's performance has occurred as a result of using the AT?
- Are changes in the student's program of AT use needed?

If the answer to any of the first three questions is negative, further analysis may be needed to determine the cause. The problem may lie in inadequate support, insufficient student or family training, too few opportunities to use the AT during the day, a perception on the student's part that the AT is not "cool", etc. While data analysis may show that the initial assessment and AT selection was incomplete, this is uncommon if a thorough evaluation was completed. Too often teams assume that the device is the problem and switch to a new one, when additional services, including support for staff may be needed instead.

Analysis of what is occurring in the classroom can reveal the underlying cause of the failure to utilize AT or its failure to function as expected. If the data does not show the expected changes, are there any obstacles that may be inhibiting success (e.g., difficulties with physical access; lack of

opportunities to use the AT; inadequate instruction or practice; student preferences or attitude; etc.)?

In the absence of sufficient progress or even when the child has made more progress than the team expected, data analysis can help the team to decide what changes in the student's program are needed. These changes may include adjustments to AT services, AT tools, or both. Analyzing data helps to pinpoint specific training or supports the student needs. When the team analyzes the student performance, team members can make necessary adjustments and avoid making errors such as assuming the student has skills that are not present, assuming the student does not have skills that are actually mastered, or prematurely abandoning the AT tool. Some changes in a child's performance may require that the IEP team adjust the IEP goals. (QIAT, 2010).



#### **TERRY • Reviewing the Use of the Word Processor**

*Terry's use of the word processor made a big difference in the quality and number of assignments she turned in during the second half of seventh grade. For the first two months, the papers she wrote using the word processor were neater and more readable but they were even shorter than the ones she had written with a pencil. The occupational therapist was able to provide her teachers with a research article that helped them to understand that it is common for written assignments to be shorter during initial use of technology. The team felt that it was very significant that Terry had turned in all the required assignments. Team members agreed to try the plan for two more months before they made any major changes. At the end of the four month period they held a short meeting to review Terry's progress and everyone agreed that her written papers were again at an acceptable length. Because the quality of the work far surpassed what she could do with a pencil, it was agreed that Terry would continue to use the word processor until the end of the school year and that plans for assistive technology would be reviewed during her spring IEP meeting.*

### **Actions for the Student's Team**

Action items for the student team at the point of Periodic Review center around assessment of the student's progress while using AT and identification of future needs.



#### **Review student performance data that includes the use of assistive technology:**

Meaningful data provides a way to analyze performance or look for patterns within student responses and errors. This data is necessary to identify what may be preventing the student from reaching a desired goal. Data may be formal or anecdotal depending on the child and the type of assistive technology being used. It may include specific trial data, anecdotal data, formal observations, teacher report and/or parent report (Reed, Bowser, & Korsten, 2004). Matching data collection strategies to the type of information needed and the conditions under which data is collected increases the likelihood that the data will be useful and meaningful (see Figure 1.)

A student's opinions and feelings about the use of AT are important pieces of data. Research indicates that if a student does not feel that the assistive technology helps with difficult tasks, the technology is more likely to be abandoned (Scherer, 2000). Student

interviews are an excellent source of information and data. Student participation in team planning, when appropriate, is another way to ensure that the plan will meet the identified student needs. *Hey! Can I try that?* a student workbook for assistive technology can help the child to articulate ideas and opinions about assistive technology use and to contribute to team discussions.

Type of Information Gathering	When to Choose It	Potential Data
<b>Interview</b>	When student is able to provide needed information; And/or it is not observable	Student’s preferences, feelings, intentions, concerns, device features that are important to the student
<b>Review a Product Created by Student</b>	When amount of time and number of opportunities to respond are constant (or not important)	<b>Number</b> of correct responses (e.g., on math assignment, spelling test, etc.)
	When time is constant (or not important) and opportunities vary	<b>Percentage</b> of correct responses
	When both amount of time and opportunities vary from day to day	<b>Rate</b> of correct responses
<b>Observation – Anecdotal</b>	When an event occurs only infrequently or “specific” actions to note have not been identified	General setting and information, related factors, context of occurrence
<b>Observation – Event Recording</b>	When specific observable behavior or action is occurring	<b>Number</b> of occurrences of specific action (e.g. looked at preferred choice, initiated communication, etc.)
	When time is constant (or not important) and opportunities vary	<b>Percentage</b> of occurrences of specific action
	When time varies or time and opportunities vary	<b>Rate</b> at which specific action occurs
<b>Video or Audio Tape</b>	When very detailed behavior needs to be analyzed or compared over time or analyzed in several ways or there is disagreement about what is occurring	Number of occurrences, rate of occurrences, type of change, subtle changes, etc.

**FIGURE 1: EFFECTIVE USES OF DATA COLLECTION STRATEGIES**



**Evaluate the adequacy of the current information used to revise the AT implementation plan:**

When data has been reviewed, the student's team may decide that additional information is needed in order to assess the success of the program and make future plans. Sometimes teams may determine that there is not sufficient information to complete the periodic review and may change or add to the data collection strategies as part of the adjustment to the student's plan. Data that is collected on a regular, planned basis, reviewed frequently and used to make changes in a child's program can be a valuable asset to helping the child attain goals.



**Determine changes that may be needed in the plan for assistive technology use:** After a review of performance data about a student's assistive technology use, the team may find that there is clear evidence that assistive technology is making a difference for the child. But the team may also find that there is clear evidence that changes need to be made. Such changes might include a change in services, a change in the way the device is used, a change in the device itself, or even the addition of a non-technology solution to the identified problem.



**Assign persons responsible for data collection if new information is needed:** In a well-crafted AT use program, all staff who work with the child are involved in planning for and carrying out evaluation tasks. However, it is desirable to identify at least one person who will make sure that all ongoing data collection activities are implemented and that a review of the child's progress in AT use is completed as often as planned. During a periodic review at an IEP meeting, this person might lead the discussion of how AT is working and help the team to identify any changes that might be needed.

### Responsibilities of Team Members in Periodic Review

The responsibilities for team members at the point of periodic review involve making judgments about the current AT the child is using and decisions about whether to continue the use of that AT in a child's IEP. Meaningful data helps to answer questions about what is working, what is not working and what needs to be changed. For example, Joshua's communication device was set to automatically create a report on the number of times he used the specific science vocabulary on his AAC device during his science class. It was not until the Speech Language Pathologist (SLP) observed him in class that she understood that he did not have the basic core vocabulary he needed to answer daily questions and participate in classroom discussions. While the words from the science textbook were on the device, he had no way to say "I don't understand that one," or "Could you repeat that please?" Before her observation, the team had considered changing his communication system because he wasn't using it often. After the SLP's observation the team made a plan to add core vocabulary and update content vocabulary more frequently so Joshua could be an active participant in his science class.

Team members may feel that results of periodic review indicates that the team has selected the wrong AT device for a child. The results may also indicate that a student is ready to move on to a more sophisticated AT solution. Whatever the reason, when the team decides that a change in the type of technology is needed, members must be aware of other assistive technology devices that have features that match the child's needs. If a change is warranted, new trial periods should be implemented before the change is made (see Chapter 5-*Trial Periods*).

**SHAR • *Reviewing the Use of Communication Boards***

*Shar's educational team had agreed to meet at the end of a month to talk about how things going with her use of communication boards to increase conversations in the lunch room. The reports were exciting. Shar had been using her boards with her communication buddy in the lunch room and social studies for about two weeks when she began to insist on carrying them to the music class. This had not been part of the original plan, but Shar's instructional assistant saw no reason to keep her from taking them with her. Shar had carried her board into music class, walked up to the music teacher and pointed to the square that said, "I got a new tape." She had then pulled the tape out of her back pack and handed it to the teacher. That day the music teacher played songs from Shar's tape and used them to teach the class about measures and time signatures. Shar grinned widely as she pounded on her drum with everyone else.*

*Periodic Review also revealed that the high school student who was assigned to make Shar's boards every day had an attendance problem and there had been several times when there was no one to make a new board for Shar. One day Shar had spilled her tomato soup on her board and became so angry that she had to be removed from the lunch room. One of the students chosen to be a communication buddy for Shar broke her leg and there had been no one to implement the program while she was absent. During the next periodic review meeting, people who could act as back-up when someone was absent were identified for both the creation of boards and for communication buddies in the lunchroom.*

*Data collection had gone well on the days when there was data to be collected. The instructional assistant who worked with Shar in social studies reported that she had used her board only once on the first day but her rate of communication had subsequently increased to three responses in a one hour period. The team decided not to make any further changes in Shar's program until her average initiation of communications was six responses in one hour. They also discussed the fact that they would like to help Shar learn to initiate conversations using her board as a future goal.*

**IMPLICATIONS FOR SCHOOL DISTRICTS**

When periodic review indicates that assistive technology is not being used or is not functioning as expected, school staff should know what to do next. District operating guidelines should help IEP teams know how to proceed when a change is needed. The first step for teams is to identify the cause of the problem with AT use. It may be that the assistive technology was inappropriate to the needs of the child, that the staff or the student need additional training, that additional modifications or accommodations related to the assistive technology are needed or that there may be another solution to improving student performance that does not include technology. Staff training is needed that describes the district's procedures for making changes to the IEP if they are needed.

Professional development provided by the district should include data collection and data analysis strategies that help educators know how to adjust student's program of assistive technology use. As technology changes and new solutions become available, school districts should ensure that monitoring of a student's technology use includes the option to try new solutions when they are warranted.

Another reason that the choice of an AT device may be revisited is the pressure to try the newest technology. There is always an interest in the latest technology, especially the new tablet devices that receive so much advertisement and discussion. Many school districts are purchasing large numbers of tablets and other handheld devices. They may then evaluate a variety of apps to determine the most effective programs and uses. Similarly, many parents are requesting the use of tablets and other popular mainstream technology because they have seen or heard first person accounts of their use. While these tools do have many valid uses and may be a good choice for some students, it is really the programs or “apps” that make it a good tool.

When students meet educational goals and the IEP team begins to establish new ones, new trial periods of assistive technology devices will be necessary. In addition to being a resource for making initial assistive technology decisions, a district loan bank of equipment for student use can ensure that, as a student's needs change, additional AT alternatives will be available.



### Quality Indicators for Evaluation of Effectiveness





The primary focus of periodic review is to evaluate the effectiveness of the AT being used. The Quality Indicators for Evaluation of Effectiveness highlight aspects of periodic review that make it both efficient and effective. The indicators include team member roles, data collection, documentation, and analysis to ascertain the significance and utility of the data. Using these indicators can help the team reflect on their practices and improve areas where needed.

1. Team members share clearly defined responsibilities to ensure that data are collected, evaluated, and interpreted by capable and credible team members.
2. Data are collected on specific student achievement that has been identified by the team and is related to one or more goals.
3. Evaluation of effectiveness includes the quantitative and qualitative measurement of changes in the student's performance and achievement.
4. Effectiveness is evaluated across environments during naturally occurring and structured activities.
5. Data are collected to provide teams with a means for analyzing student achievement and identifying supports and barriers that influence assistive technology use to determine what changes, if any, are needed.
6. Changes are made in the student's assistive technology services and educational program when evaluation data indicate that such changes are needed to improve student achievement
7. Evaluation of effectiveness is a dynamic, responsive, ongoing process that is reviewed periodically.


(QIAT, 2011)

## Action Items for Systems Change

Action items that can help to improve the quality of period reviews center around making sure that the implementation plan and the student's use of AT is proceeding as expected. Periodic review also helps teams anticipate future needs and changes in the plan so that the student can be prepared for them.

-  **Provide training to district staff in data analysis and modification of assistive technology plans when needed:** When data shows that the student is making more rapid progress than expected or that the device has not provided the anticipated benefit to the student, the student's program should be modified. Educators may need help in analyzing performance data and making decisions about change based on their analysis.
-  **Provide guidance to district staff in the procedures for making needed modifications of assistive technology plans that are included in the IEP/IFSP:** Because technology plans are included in IEP's and IFSP's, district staff will need to know procedures for modification of IEP/IFSP's when assistive technology that is included in the IEP does not function as expected.
-  **Identify continuing education needs of district staff:** These needs will be determined by the nature of the assistive technology being used as well as the skills of the staff. Inservice training needs assessments conducted by the district AT planning team should include questions regarding staff knowledge of assistive technology devices, services and regulations.
-  **Ensure that assistive technology equipment in the district's collection is available to all staff:** When districts invest in a collection of assistive technology devices and software, all staff members who work with students with disabilities should have information about what is available and how they can access the equipment. This makes it more likely that people will try new AT solutions. A widely distributed catalog or an online list of things that can be borrowed for trial use should be universally available to team members when they need to investigate a new device for a student who is already using AT as a part of the educational program.

### STEVE • *Frequent Assistive Technology Reviews*



*Steve's learning needs were so complicated that the team decided to have a short weekly meeting to review his program. This meeting included discussion of many aspects of Steve's day but often focused on his use of technology. Adjustments were regularly made to the program and all members of the educational team were kept informed. Steve's mother was invited to attend these meetings and eventually decided to do so once a month. With this frequent periodic review, Steve gained skill in using his CCTV as well as in understanding computer synthesized speech.*

## REFERENCES

- Bowser, G. & Reed, P. (2007). *Hey! Can I Try That?*, Winchester, OR, Coalition for Assistive Technology in Oregon. Retrieved from [www.educationtechpoints.org](http://www.educationtechpoints.org)
- QIAT Consortium. (2010). *Quality Guiding Document: Evaluation of Effectiveness*. Retrieved from [www.qiat.org](http://www.qiat.org)
- QIAT Consortium. (2011). *Quality Indicators for Assistive Technology*. Retrieved from [www.qiat.org](http://www.qiat.org)
- Reed, P., Bowser, G., & Korsten, J. (2002). *How Do You Know It? How Can You Show It?* Oshkosh, WI: Wisconsin Assistive Technology Initiative. Retrieved from [www.wati.org](http://www.wati.org)
- Scherer, M. (2000). *Living in the state of stuck*, Cambridge, MA Brookline Books, Inc.

## RESOURCES

Bowser, G. & Reed, P. (2007). *Hey! Can I Try That?* Winchester, OR: Coalition for Assistive Technology in Oregon. Download from [www.educationtechpoints.org](http://www.educationtechpoints.org)

A workbook for students that provides guided questions to help them participate in their own AT planning and in decision making process. Appropriate for middle school, high school, and transition aged students.

Bowser, G., & Reed, P. (2011). *The ABC's of Effectively Evaluating Assistive Technology Use*. Winchester, OR: Coalition for Assistive Technology in Oregon. Order from [www.educationtechpoints.org](http://www.educationtechpoints.org)

One of a series of six one-page Quick Sheets, it identifies specific steps to follow with prompts and questions to follow to ensure good evaluation of the effectiveness of the AT use.

Korsten, J., Foss, T., & Berry, L. (2007). *Every Move Counts, Clicks and Chats: emc<sup>3</sup>*, Lee's Summit, MO: EMC Communications, Inc,

A sensory based approach to communication and assistive technology for individuals with significant sensory-motor differences, developmental differences and autism. *Every Move Counts* is based upon a thirty-three month research project involving 91 children. It includes directions and forms for completing functional assessment of a student's communication efforts.

Teaching Children with Autism Printable Documents. Download from [www.polyxo.com/documents/#data](http://www.polyxo.com/documents/#data)

Here you will find a variety of documents for printing and use within your programs: data sheets, planning matrices, and many other types of documents .

QIAT Consortium. (2010). *Quality Indicators Guiding Document: Evaluation of Effectiveness*. Download from [www.qiat.org](http://www.qiat.org)

The guiding document explains and illustrates each of the quality indicators for evaluation of effectiveness.

QIAT Consortium. (2008). Plan for Evaluation of Effectiveness of AT Use. Download from [www.qiat.org](http://www.qiat.org)

..... A one page planning checklist to help the IEP team take steps to evaluate the effectiveness of a student's assistive technology use.

Reed, P., Bowser, G., & Korsten, J. (2002). *How Do You Know It? How Can You Show It?* Oshkosh, WI: Wisconsin Assistive Technology Initiative. Download from [www.wati.org](http://www.wati.org).

..... An easy to read manual that explains a variety of ways to collect and use data to make decisions about assistive technology. It utilizes numerous examples of questions that arise about assistive technology to illustrate how teams can collect and use data to make good decisions that are both appropriate and defensible. Numerous copy ready forms are included as well as suggestions for creating your own.

## **Websites**

Coalition for Assistive Technology in Oregon (CATO) – [www.educationtechpoints.org/helpdesk](http://www.educationtechpoints.org/helpdesk)

..... The CATO Help Desk application is an online database that allows the user to enter information about assistive technology breakdowns and identify possible solutions to the problems.

National Assistive Technology in Education (NATE) Network – [www.natenetwork.org](http://www.natenetwork.org)

..... Offers a variety of forms that can be used for data collection

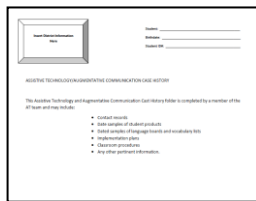


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# PERIODIC REVIEW SECTION

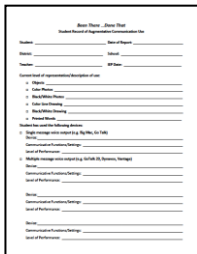
*of the Education Tech Points Website*

## For Use with Students



**AT Follow Along Form.** This form is designed to be printed on 11” by 17” heavy paper or card stock to serve as a folder for critical

records about AT or AAC use. It also has space to document that use to create a convenient history that will follow the student throughout his/her school program. The idea for this was originally from Portland Public Schools, Portland, OR



**Been There, Done That** (Caulfield & Hornfelt, 2004).

A useful form for documenting a student’s use of augmentative communication tools and devices. Collecting this information in a simple

format can prevent teams from repeatedly “starting over”.



**Plan for Evaluation of Effectiveness (QIAT)**, (2008).

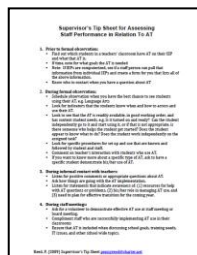
A worksheet to guide the team through an efficient process for evaluating the effectiveness of a student’s AT use.

## For Districts/Agencies



**evaluate app Rubric** (Van Houten, 2011). This rubric developed by Jeannette Van Houten helps to evaluate apps for

handheld devices to determine if they will be valuable for use by the student.



**Supervisor’s Tip Sheet** (Reed, 2009). Ideas for administrators to help assess AT use as they observe their staff both formally and informally.