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### **INDEPENDENT EDUCATIONAL EVALUATION (IEE) PROCEDURES**

(Revised 2013)

An IEE is essentially a second opinion about a student at public expense. This means that both parties must agree to the IEE and to Dr. Montgomery conducting the IEE.

If an IEE is requested by a parent or school district, the first step is to provide written confirmation that the school district has agreed to the IEE and is funding the evaluation. The next step is to provide Dr. Montgomery with basic records in order for him to make certain he is the appropriate professional to conduct the IEE of the student. It is at this point that each party should inform Dr. Montgomery if they are represented by counsel.

Once those issues have been addressed the next step is to look at Dr. Montgomery's calendar and see when he can schedule the evaluation sessions at mutually convenient times. IEE's are scheduled Mondays through Thursdays, typically starting around 9:30 am, and last three hours. A minimum of two three hour sessions are required of direct assessment of the student for any IEE evaluation.

A release must be in place for Dr. Montgomery to obtain records from and discuss the student with the school district. The release allows Dr. Montgomery to review all information contained in the student's cumulative educational file, observe the student at school (if agreed to by all parties), talk to school district personnel about the student for the purposes of data collection, and to share the results of the evaluation with the district verbally and/or through the final written report. At the end of the IEE process each party, parents and school, will receive an identical report on the findings and recommendations.

Both parents and involved school district personnel need to understand that Dr. Montgomery makes every effort to conduct his evaluations objectively, regardless of who initially requests the evaluation. Therefore, there exists no confidence between either party and Dr. Montgomery. All information provided in this matter will be used in the best interests of meeting the student's needs, regardless of which party provided the information. If the student is already in special education, Dr. Montgomery will ask that the school district send (either as a fax to 800-218-8249 or through U.S. mail) the current IEP, most recent evaluation record(s), eligibility summary, discipline and associated reports, FBA and BIP, and related records if they exist. Parents should share information (e.g. pertinent medical information, reports from evaluations conducted outside the district) with Dr. Montgomery that is not included in the student's cumulative educational file. Each party is encouraged to share whatever information they believe will assist Dr. Montgomery in formulating the most informed opinion about

the student in order to best meet the student's needs.

Inasmuch as the IEE is an independent evaluation, all IEEs are conducted at the Reinforcement Unlimited clinic unless prior arrangements are made to which all three parties agree (Dr. Montgomery, Parents, and School District). Dr. Montgomery can arrange an on-site meeting, or telephone conference, with the school district to discuss and clarify concerns regarding the issues with which the student is presenting if requested. We **do not** share information that is protected under either FERPA or HIPPA via email due to problems with meeting required confidentiality standards.

Assessment data will be collected from parents and teachers in the form of standardized questionnaires and rating scales. It is helpful to have a designated person at the school the student attends (e.g., counselor, lead teacher, homeroom teacher, learning support teacher) who can make sure that the information gets back to Dr. Montgomery. Each adult, per the instructions for all such questionnaires, is to complete each device themselves without collaboration with any other person. Our office will provide self-addressed, stamped envelopes in which the adult's paperwork can be returned directly to Dr. Montgomery.

Once the testing, any agreed upon observations, interviews, and records are collected from the school district and parents Dr. Montgomery will write a report. It is a professional obligation of all psychologists that they review the results of an evaluation with the parent/guardian of a minor child. A meeting to review the written report is typically scheduled 10-20 days after the last direct contact with the student and can include the parents and school staff. While school districts have the right to be present it is often more productive to meet with the parents so they feel free to ask any and all questions at the report review meeting. If the district agrees to such a parent only meeting an equivalent meeting can be scheduled with school district staff. The report will be sent to the school district and to the parent via USPS or secure Fax transmission.

Once the final report is submitted to the school district a final invoice for services will be submitted that details time and activities in conducting the IEE. After the discharge of the above duties with regard to the IEE all access to the finished report and records will occur only consistent with federal, state, and local laws pertaining to privileged health information .