

# **Requests for OT/PT Evaluations Procedures**

**Tri-County Special Education Association  
105 E. Hamilton Rd.  
Bloomington, IL 61704**

## Required Forms:

1. Referral for Specialized Evaluation form (2 pg.) Must include signatures of referral source and building principal.
2. OT Referral Checklist and Questionnaire--Kindergarten and Above --OT Only  
OR  
OT Referral Checklist and Questionnaire--Early Childhood--OT Only

## Steps:

Determine the need for OT/PT evaluation at an evaluation planning meeting (IEP team members, including the parent, invited and involved). Consider the all of the school-related needs of the child at that time.

Complete Referral for Specialized Evaluation (if necessary) and applicable OT checklist at the meeting where the decision to request an evaluation is made. Get required signatures.

Send forms into Tri-County for signature by the Executive Director. An OT referral form will not be signed by the director without the applicable checklist.

Upon signature by the Executive Director, the building principal and TC team will receive a brief letter telling them to whom the request was sent. For occupational therapy, Molly Walter or Loretta Baker will receive referrals. For physical therapy, referrals will be sent to ISU (Jack Mapes/Dorene Solava).

If necessary, the Executive Director will contact either OT or either PT to review a referral, contact the school, and gather additional information. A decision to conduct will be made jointly by the OT/PT and director in that circumstance. A Notice Not to Conduct will be sent out in the event of a rejection.

## Considerations:

The need for an OT or PT evaluation should rarely occur in isolation or as an afterthought. It should generally be part of a comprehensive evaluation--conducted at the same time as the overall evaluation. Because all evaluations require a planning team meeting and because teams are required to consider all school-related needs, the need for an OT or PT evaluation should be evident at that meeting.

An OT/PT evaluation should never occur only because of a doctor's prescription. In the event of a doctor's prescription being presented to the school "out of the blue," a planning team should be convened to discuss the merits of a school-based evaluation. If no evaluation is warranted from a school perspective, then a Notice Not to Conduct and Evaluation should be completed and sent to the parents.

Refer to the Tri-County Service Criteria and Guidelines for indicators of the need for OT. Evaluators will use the service criteria/guidelines and the rules and regulations for determining the need for related services when making recommendations for OT eligibility and the termination of OT services. The need must be SCHOOL-BASED and related to a disability, the need must have an adverse effect and related services must be considered necessary in order for a student to benefit from special education.

Service minute recommendations may fluctuate from year to year based upon goals, progress, classroom expectations, and alternative service providers. The type of service may also vary from year to year. ESY decisions for OT are to be made in accordance with TCSEA Guidelines.