

Psychoeducational Evaluation Report Cheat Sheet

Reviewed by the BastionGPT Clinical Advisory Board · July 2026

A psychoeducational evaluation report integrates cognitive, academic achievement, and behavioral data with records, interviews, and observation to answer a learning question. The format is convention; the content triggers (all areas of suspected disability, multiple measures, observation, timelines) are law, and parents will read it.

Identifying information & referral question the question is the spine of the report

Do: state the student, grade, school, testing dates, who asked, and the specific learning question in one or two sentences.

Pitfall: a generic "academic concerns" referral; vague questions produce recommendations that answer nothing.

Background & educational history instruction and intervention response included

Do: cover development, language, attendance, instruction received, and every intervention tried with its progress data.

Pitfall: omitting intervention response; the team must rule out lack of appropriate instruction, and silence blocks them.

Observation classroom plus testing session

Do: document the student in the area of difficulty (pre-referral observations can count) and how they engaged during testing.

Pitfall: no validity statement; uninterpretable scores take every later conclusion down with them.

Tests administered full names, editions, dates

Do: list each instrument by full name and edition with administration dates.

Pitfall: undated instruments and aging norms; the legal standard is technically sound instruments.

Cognitive results indexes, not one number

Do: report index scores with confidence intervals and percentiles, interpreted in prose.

Pitfall: leading with a single IQ as gatekeeper; no federal rule requires an IQ score, and no single measure may decide.

Academic achievement results what the scores mean for instruction

Do: tie standard scores by domain back to the referral question, and say what the student can and cannot yet do.

Pitfall: scores without instructional meaning; a 76 in Calculation tells a team nothing by itself.

Social-emotional & behavior results more than one informant

Do: use rating scales from at least two informants and settings, integrated with observation and history.

Pitfall: single-informant conclusions; cross-informant agreement is modest, which is why the multi-source rule exists.

Summary, integration & exclusionary factors the team decides eligibility

Do: pull everything into one explanation, address instruction, attendance, sensory, and language factors, and answer the question.

Pitfall: writing an eligibility verdict or leaning on the discrepancy formula; states cannot require it, and the team decides.

Recommendations & sign-off the section everyone reads first

Do: number each recommendation, tie it to a finding, name the progress metric and re-evaluation trigger, and sign with credentials.

Pitfall: boilerplate closing lists; parents, teams, and hearing officers notice when every report ends the same way.

Before you sign

- ☐ Summary answers the referral question
- ☐ No conclusion rests on a single measure
- ☐ Intervention response documented with data
- ☐ Observation and validity statement present
- ☐ Exclusionary factors addressed by name
- ☐ Each recommendation traces to a finding
- ☐ Eligibility left to the team, not the report

Drafting with AI

Capture 30 seconds of bullets after scoring: referral question, instruments with key scores, validity note, intervention data, integration, recommendations.

"Draft a psychoeducational evaluation report from these results, grade 6 student with persistent math difficulty, WISC-V FSIQ 99 with WMI 85, WJ IV Calculation 76, two documented intervention cycles with limited growth: ..."

Never paste student-identifying information into consumer AI tools. BastionGPT is HIPAA-compliant with a signed BAA on every plan.

4–15 pages
typical length

5–6 hrs per case
clinical team estimate

Learning questions
when it is written

Parents · team · teachers
who reads it

Psychoeducational Evaluation Report Template

Copy or print for your practice · Adapt fields to your organization's, payer's and jurisdiction's documentation requirements.

Student (initials): _____ Age / grade: _____ Dates of testing: _____ Report date: _____

Evaluator / credentials / license: _____ Supervisor (if required): _____ Referral source: _____

Referral question

The specific learning question this evaluation should answer, in one or two sentences

Background & educational history

Development / language / attendance; instruction received; interventions tried with response data; prior evaluations; records reviewed

Observation & validity

Classroom observation in the area of difficulty (or pre-referral observation used); testing-session behavior; explicit validity statement

Tests administered

Full instrument names with editions and administration dates

Cognitive results

Index scores with confidence intervals and percentiles, interpreted in prose

Academic achievement results

Standard scores by domain with the instructional meaning stated

Social-emotional / behavior results

Rating scales from two or more informants and settings, integrated

Exclusionary factors considered

Instruction received and intervention response; attendance; vision / hearing screening; language difference; other

Summary & integration

One explanation across measures; answer the referral question; eligibility stays with the team

Recommendations, progress monitoring & re-evaluation trigger

Numbered, specific, tied to findings; the metric, the review cadence, and what would prompt re-evaluation

Evaluator signature / credentials: _____ Supervisor signature (if required): _____ Date signed: _____