



Educational Needs Needs - Assessment Workbook

A printable workbook covering the eight-step Special Needs assessment scoped to educational needs needs. Fill it in on paper before completing the online assessment. Every question is optional and you can leave anything blank.

Step 1. Understand the Concern

Describe the educational concern you want to address (e.g. school performance, an IEP or Section 504 plan, attendance, or a specific classroom issue).

Roughly how long has this been a concern?

- ☐ Less than 3 months
- ☐ 3 to 12 months
- ☐ 1 to 3 years
- ☐ More than 3 years

This concern currently affects my child's daily life.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

How time-sensitive is this concern?

- ☐ Immediate / crisis
- ☐ Needs attention within weeks
- ☐ Longer-term planning
- ☐ Ongoing / stable

Step 2. Identify the Child's Current Needs

Which of the following describe your child's current needs? Select all that apply.

- ☐ Learning difficulty or developmental delay
- ☐ Kindergarten readiness
- ☐ Academic performance
- ☐ School attendance
- ☐ Educational evaluation or testing
- ☐ IEP or Section 504 services
- ☐ Tutoring or academic support
- ☐ Classroom accommodations
- ☐ Behaviour plan at school
- ☐ Communication with teachers
- ☐ Special events or field trips
- ☐ Extracurricular activities

Are any of these additional areas also involved? Select all that apply, or leave blank.

- ☐ Sleep or fatigue issues
- ☐ Diet or nutrition
- ☐ Sensory sensitivities
- ☐ Mobility or motor skills
- ☐ Social relationships
- ☐ Family stress affecting the child
- ☐ Financial coordination between homes
- ☐ None additional
- ☐ Other

Step 3. Review Professional Recommendations

Who is currently involved with this concern? Include every teacher, school counsellor, IEP team, or educational specialist who has evaluated or is treating your child.

- ☐ Paediatrician



- ☐ Family physician
- ☐ Specialist physician
- ☐ Psychologist
- ☐ Psychiatrist
- ☐ Therapist or counsellor
- ☐ Occupational therapist
- ☐ Physical therapist
- ☐ Speech-language pathologist
- ☐ Teacher
- ☐ School counsellor
- ☐ IEP or 504 team
- ☐ Case manager or care coordinator
- ☐ No one yet

What does the most recent educational recommendation include? Select every category that applies.

- ☐ Special-education services (IEP)
- ☐ Section 504 accommodations
- ☐ Classroom accommodations
- ☐ Tutoring or academic support
- ☐ Behaviour plan at school
- ☐ Speech-language therapy
- ☐ Occupational therapy at school
- ☐ Additional evaluation or testing
- ☐ Change of placement or setting
- ☐ Other

Do you have the recommendation in writing (report, plan, prescription, IEP, etc.)?

- ☐ Yes
- ☐ Partly
- ☐ No
- ☐ Unsure

I understand the current recommendations for my child.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

Step 4. Each Parent's Understanding

Both parents have received the same written information about this concern.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

Both parents attend key appointments, meetings, or evaluations.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

My co-parent and I can discuss this concern openly and calmly.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

My co-parent and I use the same words when describing the concern to our child.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

I believe my co-parent understands what our child is going through.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

Step 5. Coordination Between Homes

Daily routines that affect this concern (medication, bedtime, homework, therapy practice) are consistent across both homes.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

Professional recommendations are followed in both homes.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A

My co-parent and I share updates about appointments, changes, and new information promptly.

- ☐ 1 Strongly disagree ☐ 2 Disagree ☐ 3 Unsure ☐ 4 Agree ☐ 5 Strongly agree ☐ N/A



Supplies the child needs (medication, adaptive equipment, homework, comfort items) travel reliably between homes.

() 1 Strongly disagree () 2 Disagree () 3 Unsure () 4 Agree () 5 Strongly agree () N/A

Transitions and handoffs happen without disrupting the plan.

() 1 Strongly disagree () 2 Disagree () 3 Unsure () 4 Agree () 5 Strongly agree () N/A

Step 6. Agreement and Disagreement

Where do you and your co-parent clearly agree on this concern?

Where do you and your co-parent see it differently?

Which type of gap best describes the disagreement?

- () Different information
- () Different priorities
- () Different parenting styles
- () Communication breakdown
- () No meaningful disagreement

Step 7. Practical Co-Parenting Options

Select the practical options you would consider trying. You can pick more than one.

- ☐ Both parents on the school contact list
- ☐ Duplicate report cards and school communications sent to each parent
- ☐ Shared homework folder that travels between homes
- ☐ Alternating attendance at parent-teacher conferences
- ☐ Both parents attend IEP or 504 meetings
- ☐ Shared school calendar (events, holidays, exam dates)
- ☐ Written homework routine agreed in both homes
- ☐ Neutral educational liaison or advocate
- ☐ School-provided planner used consistently in both homes
- ☐ Both parents review the IEP or 504 plan together

Any additional cross-cutting options to consider?

- ☐ Regular parent-only check-ins
- ☐ Written communication log
- ☐ Mediation for major decisions
- ☐ Third-party parenting coordinator
- ☐ Shared parenting app (OurFamilyWizard, TalkingParents, etc.)
- ☐ Formal written co-parenting agreement
- ☐ None additional
- ☐ Other

Step 8. Create an Action Plan

What is the single most important thing to address in the next 30 days?

- () Schedule the next professional appointment
- () Refill medication or supplies
- () Update the shared calendar or plan
- () Align on daily routine between homes
- () Have a difficult conversation with my co-parent
- () Speak with a mediator or family professional
- () Communicate with the child's school or provider
- () Complete an evaluation or paperwork



☐ Other

When could you and your co-parent meet (or send a written proposal) to discuss this plan?

- ☐ This week
- ☐ Within 2 weeks
- ☐ Within a month
- ☐ Undecided

Which teacher, school counsellor, IEP team, or educational specialist would be most useful to consult next?

- ☐ Classroom teacher
- ☐ School counsellor
- ☐ IEP or 504 coordinator
- ☐ Special-education advocate
- ☐ Tutor or academic coach
- ☐ Educational psychologist
- ☐ Speech or occupational therapist
- ☐ Other
- ☐ No new professional needed

Do you have any concerns about the plan you would like to raise before finalising it?

- ☐ No concerns
- ☐ Concerns about my co-parent following the plan
- ☐ Concerns about cost or logistics
- ☐ Concerns about how our child feels about the plan
- ☐ Concerns about safety or communication
- ☐ Something else I want to flag

This workbook is for co-parent preparation and mediation. It is not legal, medical, or psychological advice, does not determine parental fitness, and does not diagnose. Complete the online assessment to receive your personalised 9-section polished report.