SCHOOL–BASED
EDUCATIONAL PSYCHOLOGY SERVICE GUIDE

(For Schools Receiving Service from School Sponsoring Bodies)

EDUCATION BUREAU
(Revised in 2016)
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Chapter 1 Introduction

1.1 Starting from the 2008/09 school year, Education Bureau (EDB) has extended the provision of the School-based Educational Psychology Service (SBEPS) by phases to enhance the support for schools in catering for students’ diverse educational needs. At present, SBEPS is provided for public sector primary and secondary schools by selected school sponsoring bodies (SSBs) and EDB. The objectives and service scope of the SBEPS provided in these two modes are basically the same.

1.2 EDB has been evaluating the implementation of SBEPS since its launching. A review of SBEPS was completed in the 2011/12 school year. Based on the results of the review report and feedback from stakeholders, EDB has already taken various improvement measures such as the enhancement of funding provision, strengthening of professional support for educational psychologists (EPs) and communication among the stakeholders. EDB will continue to evaluate the effectiveness of SBEPS and further enhance the service.

1.3 To strengthen support to schools on implementation of preventive and developmental work, on provision of comprehensive and regular follow-up to students, as well as on provision of intervention services, EDB will provide enhanced service to government and aided schools with a large number of students with special educational needs progressively from the 2016/17 school year.

1.4 This SBEPS Guide (the Guide) targets specifically at the operation of SBEPS1 under SSBs. It aims at facilitating various stakeholders, namely the SSBs, base schools, participating schools, serving EPs, EP supervisors, consultants as well as members of the Steering Committee in their planning, steering, implementation, and evaluation of the SBEPS.

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1 School-based Educational Psychology Service (SBEPS) includes SBEPS provided to schools under the arrangement of EDB starting from the 2008/09 to 2016/17 school year, as well as the enhanced service provided to some schools with a large number of students with special educational needs from the 2016/17 school year.
Chapter 2  Objectives

SBEPS is a comprehensive and integrated EP service that aims at enhancing schools’ capacity to cater for students’ diverse educational needs. Participating schools will be facilitated to achieve the following objectives:

(a) The school will have an inclusive ethos and a caring environment backed up by whole-school policies and sound mechanisms to cater for students with diverse educational needs.

(b) The school personnel will have adequate knowledge and skills to support students with diverse educational needs and to enhance the effectiveness of learning and teaching.

(c) The students can maximize their potentials and minimize their difficulties.
Chapter 3  Nature and Scope of Service Delivery

Comprehensive Service

3.1 SBEPS is delivered by qualified EPs through regular school visits. The service covers remedial, preventive and developmental work in catering for students’ diverse educational needs at the school system, teacher support, and student support levels.

Regular School Visits

3.2 EPs providing the SBEPS shall visit their target schools regularly throughout the school year. Each EP shall pay not less than 140 school visit days per school year. The number of visit days for individual schools shall depend on the number of schools served by the EPs and the need of the schools and their students. Under the SBEPS, schools will normally have not less than 14 visit days per school year, whilst for schools receiving enhanced services, there will be not less than 30 visit days per school year.

Target Levels

3.3 EPs provide comprehensive service to schools at the following target levels:

(a) School System Level
   (i) To support schools in developing whole-school policies to cater for student diversity, including but not limited to policies on integrated education, early identification and intervention, and accommodation for students with special educational needs (SEN) / emotional and behavioural difficulties / mental health problems; as well as gifted education, discipline and guidance, and anti-bullying policies;

   (ii) To support schools in developing effective mechanism to meet the diverse educational needs of their students, which includes the setting up of a systematic data bank on students with SEN and setting up of a team of school personnel responsible for the planning and monitoring of school-based support for these students as well as reviewing the progress of students;

   (iii) To support schools in developing policy and mechanism on crisis management and to render crisis management service to school whenever necessary; and
(iv) To support schools in implementing government policies and new educational initiatives in promoting student and school development.

(b) **Teacher Support Level**

(i) To support teachers in the early identification of at risk students, as well as the planning and implementation of appropriate intervention measures for these students;

(ii) To advise teachers on measures to enhance learning and teaching effectiveness as well as behaviour support such as diverse teaching strategies, curriculum adaptation, assessment accommodation, differentiated instructions, tiered assignments, flexible grouping and behaviour contracting to meet the diverse needs of students;

(iii) To advise teachers and school personnel on the design and implementation of Individual Education Plan (IEP) for students in need of intensive individualized support;

(iv) To advise teachers and guidance personnel in planning and implementing school-based psycho-educational programmes for students, such as enrichment programmes for gifted students, study skills training for students with specific learning difficulties, executive skills training for students with attention deficit/hyperactivity disorder, and peer support programmes;

(v) To support teachers in school-based action research related to the domains of student support as well as learning and teaching; and

(vi) To conduct annual staff development training to equip teachers with knowledge and skills to meet the personal, social and educational needs of students.

(c) **Student Support Level**

(i) To provide psycho-educational assessment, counseling and guidance services for students;

(ii) To provide intervention or behavior guidance programmes for students directly
and/or in collaboration with school personnel such as teachers, student guidance personnel and/or school social worker; and

(iii) To promote home-school co-operation in child management and deliver parent training programmes in collaboration with school personnel.

3.4 The SBEPS delivered to each school shall cover all three levels of support with reference to the following proportion: school system level (10%), teacher support level (40%), and student support level (50%). As participating schools differ in their background and developmental stage, appropriate adjustment of the proportion can be allowed based on the need of individual schools.

**Intervention Work**

3.5 The scope of the service covers the following areas of work:

(a) Remedial work aims at reducing the consequences of problems or dysfunction that have occurred. Examples include:

(i) providing assessment, counseling and/or training services to students with SEN and those who experience emotional, behavioral, or mental health problems that impair their learning and/or social adjustment, as well as sharing support strategies with school personnel and parents after training;

(ii) collaborating with school personnel, parents and/or other professionals in the design, implementation, and review of students’ IEPs;

(iii) providing consultation services to teachers on managing emotional-behavioral problems of students; and

(iv) supporting schools during and after crisis situations, e.g. student suicide or other critical incidents.

(b) Preventive work focuses on early intervention in order to prevent problems or dysfunction from arising or aggravating. Examples include:

(i) providing talks on emotional health to students of target grade levels;
(ii) providing assertive training for students at risk of bullying;

(iii) organizing workshops for parents on helping children to manage stress;

(iv) conducting workshops for school personnel on managing behavioral problems of students;

(v) providing consultation services to teachers on accommodating teaching and adapting curriculum for students with learning difficulties;

(vi) assisting schools on establishing or enhancing school-based crisis management policies and measures; and

(vii) facilitating schools to foster an inclusive culture.

(c) Developmental work focuses on enhancement and enrichment of positive qualities. Examples include:

(i) devising leadership training to student volunteers in peer tutoring programmes;

(ii) organizing parent workshops on nourishing creative thinking skills of children;

(iii) conducting staff development workshops on critical thinking;

(iv) supporting teachers to conduct school-based action research on applying elements of gifted education in curriculum;

(v) assisting schools to nourish self-esteem and a sense of responsibility of students through refinement of policies on discipline and guidance; and

(vi) providing consultation on school self-evaluation and school development plan.
Chapter 4  Roles and Responsibilities of the School Sponsoring Body

Implementation

4.1  The SSB shall provide the SBEPS to all its target schools as assigned by EDB. Such schools are not limited to those under the SSB.

4.2  The SSB shall oversee and coordinate the SBEPS provided to its target schools according to the requirements of EDB as detailed in this Guide. The SSB shall:

(a)  set up a Steering Committee and hold regular meetings to plan and steer the SBEPS. The Steering Committee shall include at least one principal and an EP with not less than 3 years of EP experience as members. Roles of the Steering Committee include:
   (i)  promoting and coordinating the SBEPS;
   (ii) making decisions regarding provision and development of the service; and
   (iii) sharing good practices among participating schools.

(b)  identify a base school for each EP post awarded by EDB, and ensure that its base schools fulfill their responsibilities as detailed in Chapter 5 of this Guide;

(c)  arrange its EPs to serve all the target schools as assigned by EDB;

(d)  arrange effective deployment of its EPs when required in case of EP leaving the service or on leave, and during school crisis leading to large-scale psychological trauma among students and staff. The SSB shall inform their base schools and all affected schools of any service interruption and the contingency arrangement of the service;

(e)  promote team work and professional sharing among its EPs;

(f)  submit deliverables to EDB according to the Annual Work Schedule for EP (Please see Appendix I).

Quality Assurance

4.3  The SSB shall undertake quality assurance (QA) on the professional practice of its EPs by:

(a)  ensuring that its EPs perform their duties satisfactorily according to the nature and scope
of service delivery as in Chapter 3, to the Annual Work Schedule for EP as specified in Appendix I, as well as to the established protocol for assessment given in Chapter 7 of this Guide;

(b) ensuring that its EPs observe all relevant ordinances and regulations, including but not limited to the Personal Data (Privacy) Ordinance (PDPO) and Disability Discrimination Ordinance (DDO) in their professional practice; and

(c) establishing an effective channel to obtain feedback from users and stakeholders regularly, including but not limited to a proper complaint channel with well-defined and effective system to respond, rectify reported problems as well as to discipline under-performing EP.

4.4 The SSB shall set up a well-defined and effective system of QA for the evaluation of its provision of SBEPS. The system shall have clearly laid-down performance indicators, relevant and effective evaluation tool, as well as proper time-frame. Measures include:

(a) collecting stakeholders’ feedback on service effectiveness (please see Appendix II);

(b) holding regular review and evaluation meetings with the Steering Committee, base schools, participating schools, EPs and EP supervisors;

(c) facilitating regular and random QA visits by EDB to all schools receiving its SBEPS; and

(d) participating in review meetings and sharing activities organized by EDB to align service expectation and rectify irregularities.

Staffing Matters

4.5 The SSB shall work jointly with the base school to oversee and monitor the staffing matters of EP, such as appointment, appraisal, promotion, and leave matters. For details please refer to Appendix III.

4.6 The SSB shall inform the Educational Psychology Service (Hong Kong) Section of EDB of all staff changes including new appointment, promotion, temporary replacement, and
termination of contract, by completing the form in Appendix IV.

Handling of Documents, Assessment Materials and Resources

4.7 The SSB shall, jointly with the base school, ensure that all test materials are properly handled by qualified EP. In case of EP leaving the service, the base school shall properly lock up all test materials until the next EP takes up the duty.

4.8 The SSB shall, jointly with the base school, ensure that all documentation of referrals are kept as ‘restricted’ documents and that all personal data is protected in accordance with the Data Protection Principles as given in the PDPO. Relevant information on PDPO can be found on the EDB website (“Privacy Policy” located at lower left hand corner of the EDB homepage) ([http://www.edb.gov.hk/en/privacy-policy.html](http://www.edb.gov.hk/en/privacy-policy.html)).

4.9 All documents shall be properly kept until the student (data subject) reaches the age of 21 or for 5 years counting from the date of referral, whichever the later date is. The SSB and the base school shall devise proper policy and mechanism regarding data destruction and disposal, and ensure that the physical destruction of documents containing personal data is undertaken with appropriate security measures to avoid unauthorized or accidental disclosure of the data.

4.10 The SSB shall handle request for reports by parents and professionals following the procedures as given in the PDPO.

4.11 Together with the base school, the SSB shall manage all resources (e.g. resource package) obtained in the name of the organization. In case of EP leaving the service, the base school shall properly keep the pertinent resources and record inventory.

4.12 In the event that the SSB fails to perform its roles and responsibilities or provide the service to the satisfaction of the Government, EDB may withdraw its EP posts.
Chapter 5 Roles and Responsibilities of the Base School

Staffing Matters

5.1 Each EP post awarded to the SSB shall be employed as a non-teaching specialist staff of a base school operating under the same sponsoring body.

5.2 For appointment, appraisal, promotion, and leave matters, please refer to Appendix III.

5.3 The base school shall, jointly with the SSB, ensure its EP performs his/her responsibilities and duties according to Chapter 7 of this Guide.

5.4 The base school shall inform its respective Regional Education Office and the Recurrent Subventions Section of EDB of all changes related to EP, including new appointment, promotion, termination of contract, no-pay leave, Mandatory Provident Fund contribution, and withholding of annual increment as early as possible. The base school shall refer to EDBC NO. 10/2015 “Payment of Salaries Grant for Teaching Staff and Non-teaching Staff in Aided Schools” for detailed procedure.

One-off Set Up Grant

5.5 Since 2008/09 when SBEPS was first launched, each base school is provided with a one-off set up grant on a reimbursement basis. The grant is revised to $50,000 per EP post in the 2012/13 school year and is subject to adjustment in accordance with the annual movement of the Composite Consumer Price Index (CCPI). The base school shall utilize the grant for the purchase of (a) furniture; (b) test materials; (c) reference books; (d) educational programmes and packages; and (e) information technology equipment. The grant should be completely utilized within 12 months in which the first EP is appointed to the given post. Any surplus will then be clawed back.

5.6 The base school shall refer to the section on “School Finance Matters” of the School Administration Guide (SAG) for all the relevant rules and regulations governing accounting and financial management as well as keep proper inventory of all purchased items.

SBEPS Grant

5.7 With effect from the 2012/13 school year, every base school, including those existing base schools, is provided with an SBEPS Grant at the rate of $88,000 per annum on a recurrent
basis for meeting the operating expenses of the service. The SBEPS Grant is put under the Special Domain of the Operating Expenses Block Grant (OEBG) or as a school-specific grant under the Expanded Operating Expenses Block Grant (EOEBG). Rate of the SBEPS Grant is subject to adjustment in accordance with the annual movement of the CCPI. The base school should refer to the relevant circular memorandum issued by EDB in August each year for the revised rate of the SBEPS Grant.

5.8 The base school shall ensure that this Grant is used for SBEPS-related expenditures including:

(a) hiring of professional supervision for EP:
   - the EP supervisor must be an experienced EP (generally with 6 years or more of EP experience) and fulfills the roles and responsibilities as detailed in Chapter 8 of this Guide
   - the EP supervisor is required to provide regular professional supervision and support for the EP amounting to about 130 hours per EP each year

(b) service coordination:
   - taking care of logistics in organizing meetings and sharing activities with the participating schools, and handling enquiries
   - providing clerical support for EP work such as stocktaking deliverables for submission to EDB, filing, record keeping, and handling requests for reports from parents

(c) general expenses, such as printing and stationery, consumable stores, office utilities, replenishment of furniture and equipment, etc.

5.9 The base school shall observe the general principles and rules on usage of the OEBG/EOEBG for the deployment of the SBEPS Grant. They should also follow the current practice of the OEBG/EOEBG for the financial and accounting requirements, surplus retention, and claw back arrangement, etc. as mentioned in the OEBG/EOEBG User Guide.

Handling of Documents, Assessment Materials and Resources

5.10 The base school shall, jointly with the SSB, ensure that all test materials are properly handled by qualified EP. In case of EP leaving the service, the base school shall properly
lock up all the test materials until the next EP takes up the duty.

5.11 The base school shall, jointly with the SSB, ensure that all documentation of referrals are kept as ‘restricted’ documents and that all personal data is protected in accordance with the Data Protection Principles as given in the PDPO. Relevant information on PDPO can be found on the EDB website (“Privacy Policy” located at lower left hand corner of the EDB homepage) (http://www.edb.gov.hk/en/privacy-policy.html).

5.12 All documents shall be properly kept until the student (data subject) reaches the age of 21 or for 5 years counting from the date of referral, whichever the later date is. The base school and the SSB shall devise proper policy and mechanism regarding data destruction and disposal, and ensure that the physical destruction of documents containing personal data is undertaken with appropriate security measures to avoid unauthorized or accidental disclosure of the data.

5.13 Together with the SSB, the base school shall manage all resources (e.g. resource package) obtained in the name of the organization. In case of EP leaving the service, the base school shall properly keep the pertinent resources and record inventory.
Chapter 6  Roles and Responsibilities of the Participating School

6.1 The participating school shall fully understand and agree with the objectives of the SBEPS as detailed in Chapter 2 and be committed to developing its school policies and capacity to cater for students’ diverse educational needs. Participating school receiving enhanced service shall make more effective use of the resources by referring to Chapter 3 of the Guide, as to actively collaborate with the EP towards comprehensive enhancement of preventive and developmental work, as well as offering of regular case follow-up and intervention services to its students.

6.2 The participating school shall actively participate in joint service planning and reviewing with its EP according to Chapter 3 and the Annual Work Schedule for EP in Appendix I of this Guide. The participating school shall arrange its relevant school personnel (including the school head/vice-school head and the coordinator of student support services etc.) to meet with the EP for assessing needs, as well as for planning and reviewing of SBEPS, so as to better tailor the service to the developmental needs of the school. Cross year work targets may also be set during service planning, which helps foster better continuity of SBEPS across time.

6.3 To cater for the diverse educational needs of its students, the participating school shall regularly discuss and review with the EP its policies and measures (such as whole school policy, mechanism of early identification and intervention, accommodation arrangements, as well as crisis management mechanism, etc.) in catering for students’ diverse educational needs.

6.4 The participating school shall work with its EP, such as by reserving at least 3 hours every school year for EP to conduct professional staff development, as well as by seeking EP’s consultation on the design and implementation of IEPs, in a commitment of strengthening teacher capacity to cater for student diversity.

6.5 When EP provides group training for students (e.g. skills training for students with SENs or gifted students), the participating school shall arrange its teachers and guidance personnel to co-work with the EP on planning and conducting of such group activities, as well as on discussion of follow-up actions.
6.6 To allow for joint discussion of educational support strategies, the participating school shall arrange different stakeholders (including relevant subject/class teachers, parents, and the coordinator of student support services etc.) to meet with the EP in post-assessment meetings.

6.7 The participating school shall maintain close communication with the SSB providing the service and give its prompt feedback and views on the service quality and EP performance whenever required.

6.8 The participating school shall designate a named person to facilitate the EP’s work in its school. The designated personnel shall reserve time to meet with the EP at the end of each school visit, for discussion of case follow-up and schedule of the next school visit.

6.9 The participating school shall discuss with and consult the EP before making referral for psycho-educational assessment and/or intervention services. The participating school shall also provide a suitable room for the EP to conduct assessment during school visits and a cabinet for locking documents or tests.

6.10 The participating school shall allow for flexibility in EP’s visit schedule under special circumstances (e.g. EP needs to be involved in crisis management in another school, cancellation of school visits in cases of extreme weather or sick leave). As it is not always possible for the EP to reschedule another school visit, school may discuss and reprioritize work plan with EP on need basis.

6.11 The participating school shall keep a Log of the EP visits and make it available to EDB when required.
Chapter 7  Roles and Responsibilities of the Educational Psychologist

7.1 The EP is required to deliver the SBEPS at the school system, teacher support, and student support levels according to the task description and work schedule as detailed in Chapter 3 and Appendix I of this Guide. EPs providing enhanced service shall actively collaborate with the target school by referring to Chapter 3 of the Guide, towards assisting the school to step up its preventive and developmental work, as well as to provide regular case follow-up and intervention services to the students.

Service Planning and Needs Assessment

7.2 As each school differs in terms of its needs and developmental stage to cater for student diversity, the EP shall meet with the school head and school personnel concerned of each school to conduct needs assessment and discuss service planning prior to the launching of the SBEPS in September of each school year.

7.3 After the meeting(s), the EP shall jointly work out the annual work plan and visit schedule on each school with the school personnel concerned. Appropriate adjustment to address a school’s special need for service shall be made whenever necessary.

7.4 The EP shall ensure that the SBEPS delivered to each school is of a comprehensive nature, encompassing developmental, preventive and remedial work at different target levels. The EP shall allocate his/her professional time spent on each school with reference to the following proportion: school system level (10%), teacher support level (40%) and student support level (50%). The EP shall make appropriate adjustment of the proportion based on the need of individual schools.

7.5 The EP shall align the SBEPS with the government policies and practices in promoting student and school development.

Duties

7.6 The EP shall make every effort to pay regular visits to each target school according to the visit schedule, and to render SBEPS as per the work plan agreed with the school. The EP shall allocate not less than 140 working days for school visits per school year.
7.7 The EP shall have 5-6 centre days per month for report-writing, preparation, meetings, supervision, continuing professional development (CPD), resource development, as well as participating in sharing and networking activities organized by EDB.

7.8 Crisis management has a top priority over other areas of EP’s work. When a school crisis takes place in any of the EP’s target schools, the EP shall respond immediately and visit the school promptly to render crisis intervention. If necessary, EP shall follow the deployment of the SSB to provide crisis support services to other schools receiving SBEPS from the same SSB.

7.9 The EP shall observe the Code of Professional Conduct of the Hong Kong Psychological Society, all relevant ordinances and regulations, including but not limited to the DDO and PDPO.

**Assessment Protocol**

7.10 The EP shall observe the following performance pledge:

(a) prior to handling referrals from school, the EP shall obtain written referral from school together with parental consent form for the service and collection of personal information;

(b) for urgent referrals, the EP shall handle the cases either on spot during the school visits or not exceeding two weeks from the receipt of the referral; EP shall also seek his/her EP supervisor’s advice and support on difficult cases (e.g. those with severe emotional or behavioral problems);

(c) upon receipt of the referrals, the EP shall arrange assessment with the school concerned as soon as possible, normally the assessment shall be completed within six months;

(d) through post-assessment meeting, the EP shall explain to parents and school personnel the assessment results and discuss the educational support for every student given individual assessment;

(e) the EP shall provide parents with an Assessment Summary containing key information
on intellectual functioning, learning difficulties and recommendations for support for every case given psychometric assessment, normally within three months;

(f) the EP shall inform the parents that they may request for a copy of the Educational Psychologist’s report by completing the PDPO Data Access Request Form (Form Number: EDB56) which is available on the EDB website (Homepage of EDB> Public and Administration Related> Public Forms and Documents> Public Forms> EDB56: Personal Data (Privacy) Ordinance Data Access Request Form); EP shall also provide the form and explain the application procedure to parents if necessary;

(g) for every referral given formal and/or informal assessment, the EP shall send a copy of the Educational Psychologist’s report (see Appendix V for recommended items for assessment report) with a covering letter to the school concerned for arrangement of appropriate supportive service, normally within three months; and

(h) for cases requiring further observation and assessment, the EP shall write up a progress report or follow up report.

**Handling and Storage of Student Information, Documents, Assessment Materials and Resources**

7.11 The EP shall keep proper documentation of all referrals. Such documentation shall include the written referral from school, parental consent form on receiving the service and collection of personal information, Educational Psychologist’s report (original with signature), Assessment Summary for parent, reply letter, consultation record, test protocol as well as the SEMIS Data Input Form with assessment findings.

7.12 The EP shall ensure that the documentation of referrals are treated as ‘restricted’ documents and that all personal data is protected in accordance with the Data Protection Principles as given in the PDPO. Relevant information on PDPO can be found on the EDB website (“Privacy Policy” located at lower left hand corner of the EDB homepage) ([http://www.edb.gov.hk/en/privacy-policy.html](http://www.edb.gov.hk/en/privacy-policy.html)). All documents shall be kept until the student (data subject) reaches the age of 21 or for 5 years counting from the date of referral, whichever the later date is.

7.13 The EP shall handle all test materials, protocols and professional reports according to the

7.14 Request for reports by parents and professionals shall be handled following the procedures as given in the PDPO.

7.15 The EP shall ensure IT security which should cover but not limited to the following:

(a) avoid saving restricted information in portable electronic storage devices (such as notebook computers, Personal Data Assistants (PDAs), Universal Serial Bus (USB) flash drives, data cards such as CF, XD, SD, memory stick, etc.);

(b) encrypt personal data to ensure security, if using portable electronic storage devices is unavoidable. Delete such data from the device immediately when they are no longer needed;

(c) keep portable electronic storage devices in a secure place and employ proper security measures (e.g. set passwords in computers, use laptop and notebook computer locks, etc.);

(d) use security measures (such as firewall systems, anti-virus and malicious code detection and repair software) to safeguard the security of restricted and confidential information; and

(e) report to the Senior Management immediately when there is a loss of the device containing personal or classified information.

7.16 The EP shall make reference to the following guidelines regarding IT security:


7.17 EP shall properly keep resources (e.g. resource package) obtained in the name of the organization, and to return such resources in good condition upon leaving the service.
Chapter 8  Roles and Responsibilities of the EP Supervisor

8.1 The EP supervisor shall aim to advise, facilitate and advance the development of the SBEPS under the SSB concerned in general and the practice of its individual EPs in particular.

8.2 The EP supervisor shall assist SSB in coordinating the SBEPS, provide professional views on the employment, appraisal and promotion of EPs, as well as the deployment of EPs in case of school crisis or unanticipated service interruptions.

8.3 The scope of EP supervision shall cover the following areas:

(a) provide consultation on case work, e.g. assessment and intervention skills, report writing, consultation skills to school and parents; and provide more intensive support to EP on difficult cases (e.g. those with severe emotional or behavioral problems);

(b) provide consultation on teacher support level, e.g. learning and teaching, planning and implementation of IEPs, teacher training, action research;

(c) provide consultation on school system level, e.g. mechanism and policies to cater for student diversity, crisis management, current educational trends and reforms;

(d) provide consultation on professional issue and development, e.g. individual EP’s strengths and areas for improvement, relationships with stakeholders, ethical issues, updated resources, development and research in education and psychology; and

(e) provide special coaching to EPs in need.

8.4 The mode of supervision shall include regular supervision meetings conducted individually or in small group; phone consultation on ad hoc issues and urgent cases; individual coaching and on-site support wherever deemed necessary (e.g. for service coordination, crisis management, management of difficult cases, consultation meeting with school personnel).
Chapter 9 Roles and Responsibilities of the Education Bureau

Overseeing, Monitoring, and Quality Assurance

9.1 EDB shall:

(a) collect and scrutinize the work plans, seasonal work summary, progress reports and effectiveness questionnaires submitted by EPs;

(b) collect feedback from different stakeholders for service planning; and

(c) conduct QA visit to schools focusing on the following areas:

(i) launching, coordinating and monitoring of SBEPS by the SSB and its base schools; and

(ii) service delivery of the EPs.

Steering and Leading the Continuous Development of the Service

9.2 EDB shall also:

(a) conduct briefings for schools, SSBs and EPs to align service requirements and expectation;

(b) hold EP network and EP supervisor meetings regularly to ensure consistency in professional practices;

(c) conduct meetings with SSBs to share good practices, review service implementation, and plan for service expansion; and

(d) arrange professional sharing and development sessions for EPs, as well as case conferences with child psychiatrists on regular basis.
The following table illustrates the annual work schedule for individual EPs:

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<th>Description of Tasks</th>
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<td>(a) Provide SBEPS to schools at the school system, teacher and student support levels to cater for the diverse educational needs of students</td>
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<td>(b) Make overall planning and preparation of the service</td>
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<td>(c) Conduct needs assessment for schools</td>
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<td>(d) Hold meeting with school head and senior management to draw up an annual work plan</td>
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<tr>
<td>(e) Submit annual work plan and visit schedule to EDB</td>
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<td>(f) Submit seasonal work summary to EDB for schools receiving enhanced service</td>
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<td>(g) Conduct mid-year review with school personnel</td>
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<td>(h) Submit mid-year review report to EDB</td>
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<td>(i) Submit SEMIS Data Input Forms (DIFs) on cases handled to EDB</td>
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<td>(j) Conduct end-of-year review with school personnel</td>
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<td>(k) Fill-in and submit the SBEPS effectivenes questionnaire to EDB</td>
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<td>(l) Submit annual progress report to EDB</td>
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<td>(m) Make overall planning and preparation of the service for the following school year</td>
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Appendix II

Indicators of Service Effectiveness (For Reference)

Educational Psychologist provides School-based Educational Psychology Service (SBEPS) on three levels of school system, teacher support, and student support, while fostering school development according to needs of the school and of its students. The following are indicators of service effectiveness on the three levels:

I System Level

1. The school has adopted the **Whole School Approach** with inclusive policies and practices to cater for student diversity, including students with special education needs (SEN) (e.g. intellectual disability, specific learning difficulties, etc.), low academic achievement, emotional or behavioural problems, and giftedness.

2. The school has actively created an **inclusive culture** to foster everyone’s respect for individual differences, including students with learning, emotional or behavioral problems through inclusive activities, support network, publication, display boards, training, etc.

3. The school has formulated comprehensive **accommodation policies and practices** to cater for students with SEN (e.g. intellectual disability, specific learning difficulties, etc.). These include special examination arrangement (e.g. dictation / tests / examination accommodation or exemption), learning and teaching (e.g. homework accommodation, curriculum adaptation), student support (e.g. home school collaboration, remedial and developmental programmes).

4. The school has set up a comprehensive and effective **Student Support Team (SST)** to implement student support services. Members of the SST have good knowledge of SEN, well-defined roles and responsibilities, and work collaboratively in a systematic way to monitor student support services. They also mobilize different stakeholders to participate in student support services if necessary.

5. The SST has **regular meetings** to discuss students’ learning needs, strengths and weaknesses, and to formulate / review / revise appropriate support measures and strategies for students.

6. The school has a comprehensive **student support register** and case filing system, including students’ assessment information, learning progress, support measures on special examination
arrangement and intervention. There are also well-established mechanism and guidelines for storing, retrieving and handling of restricted documents/personal data.

7. The school has a comprehensive and systematic mechanism of early identification and case referral (including students with learning, emotional or behavioural problems). The mechanism includes a clear work schedule and procedure, use of various screening tools, and participation of different stakeholders (e.g. parents, teachers) to facilitate early identification of students with SEN.

8. The school has a clear and school-based crisis management policy and provides resources / documents for the use of different stakeholders in various situations. The school also regularly reviews and updates the policy as well as resources / documents.

9. The school has set up a School Crisis Management Team consisting of members who fully understand their roles and responsibilities, are familiarized with crisis procedures, coordinate and develop crisis plans. The school also conducts school-based crisis drills on a regular basis.

II Teacher Support Level

10. The teaching staff possesses positive attitude and rich knowledge and skills to cater for student diversity, including students with SEN (e.g. intellectual disability, specific learning difficulties, etc.), low academic achievement, emotional or behavioural problems, and giftedness; and consults its EP when necessary.

11. The teaching staff timely identifies, plans and implements appropriate intervention services for students in need of support.

12. The teaching staff makes effective use of different platforms to jointly participate in catering for the needs of students with learning / emotional / behavioural problems. Such platforms might include case conferences, meetings under the “Early Identification and Intervention of Learning Difficulties Programme for Primary One Pupils”, Individual Education Plan (IEP) meetings, as well as SST or other subject panel / team meetings, with which different stakeholders (e.g. class / subject teachers, parents, students, professionals, etc.) jointly discuss needs and formulate support plans (e.g. drawing up IEPs) for individual students.

13. Teachers accommodate different needs of students in class, via means including diverse teaching strategies, curriculum adaptation, assessment accommodation, differentiated
instructions, tiered assignments, flexible grouping and behavior contracting.

14. The teaching staff actively **works as a team** to enhance school’s effectiveness in catering for student diversity through activities such as lesson study, joint lesson preparation, collaborative teaching, lesson observation, setting up of resource bank, etc.

**III Student / Parent Support Level**

15. The school has various **modes of support** in catering for student diversity, including individual and group, in-class and outside class support (e.g. pull-out teaching, group teaching, diversified teaching strategies and class activities, etc.).

16. The school has **comprehensive support measures** in catering for student diversity and promoting their whole-person development. They include remedial, developmental and preventive work related to learning / emotional / behavioural aspects (e.g. after-school tutorials, behaviour contracting, self-regulation training, social skills / resilience training, guidance lessons in personal growth, training for gifted students, etc.).

17. The school devises **IEP** with appropriate long term and short term goals for students requiring Tier-3 support, reviews its effectiveness and revises the plan regularly to cater for the students’ individual needs.

18. The school maintains close collaboration with parents of students with SEN to promote their growth. These include engaging in regular communication, inviting them to participate in **case conferences** / **IEP meetings**, providing ways / **resources** / **training** to enhance their understanding and ways to handle their children’s learning / emotional / behavioural problems.

19. The school communicates with parents proactively through diversified and effective channels to maintain a **good partnership** with parents, as well as to enhance their parenting skills systematically (e.g. setting up of parents communication network / resource room; organizing talks / workshops / sharing sessions; setting up of volunteer team for parents to take part in school activities, etc.).

20. The school devises and implements preventive and development programmes according to the needs of all or specific groups of students (e.g. on S1 transition, stress management, positive psychology, creative thinking, etc.), and to provide or arrange pertinent training for its parents as well.
Appointment and Personnel Management of Educational Psychologist

1. The SSB and the base school shall make reference to Chapter 7 of the School Administration Guide (SAG) regarding the personnel matters and adhere to the general principles and procedures as detailed therein.

2. The base school shall also observe strictly the necessary procedures concerning appointment and dismissal of staff as stipulated in the respective Codes of Aid.

3. When considering appointment and promotion of EP, the base school shall appoint a selection panel that involves its SSB and other key stakeholders such as the EP supervisor, Steering Committee and representative(s) of participating school(s).

Appointment of EP

4. To ensure that the job applicants have met the appointment requirements, the SSB and the base school should verify carefully the qualification documents of the applicants and consult their previous employers about their job performance after obtaining the applicants’ prior consent. Qualification requirements and salary scale of EP are stipulated in the Codes of Aid\(^2\).

5. To safeguard the well-being of students, the SSB and the base school are required to adopt the enhanced measures on appointment matters and the Sexual Conviction Record Check (SCRC) scheme and request their prospective employees to undergo SCRC at the advanced stage of the employment process. For details, the SSB and the base school may refer to EDBCM No. 65/2010 on “Measures for Strengthening the Protection of students: Appointment Matters of Schools” and EDBCM No. 179/2011 on “Sexual Conviction Record Check”.

6. As the EP is to serve the base school and other participating schools, the base school shall, jointly with the SSB, state this clearly in the EP employment contract and specify the reporting structure as well as the EP’s working relationship with all target schools.

Promotion of EP

7. When considering promotion of EP, the selection panel should take into account the work performance, experience, professional expertise and other personal attributes, such as

\(^2\) Please refer to Appendix 5/Attachment (J) and (K) of the Code of Aid for Primary Schools, Appendix 4/Attachment (L) and (M) of the Code of Aid for Secondary Schools (updated in November 2012), and Section 4.24 and 4.25 of the Compendium to the Code of Aid for Aided Schools.
leadership, commitment, interpersonal relationship, judgment, planning and organization abilities, etc. of the candidate, on top of the minimum requirements as stipulated in the Guides to Appointment in the relevant Appendix to the Codes of Aid. The records of promotion shall be well documented and properly maintained for the purpose of inspection.

**Appraisal of EP**

8. The base school shall, jointly with the SSB, develop a fair and open appraisal system for the EP, with formal procedures and performance indicators clearly laid down. The appraisal shall make reference to the objectives of the SBEPS, the nature and scope of service delivery, and the roles and responsibilities of the EP detailed in this Guide. The appraisal shall also include evaluation of the EP’s work performance, professional standards, and other personal attributes.

9. All appraisal exercises should be documented. The base school should establish a filing system for keeping the EP’s appraisal records in line with the PDPO.

**Leave Matters**

10. EPs are not entitled to school holidays, but may be granted paid annual leave according to the entitlement for non-teaching specialist staff stipulated in Appendix 8 of Chapter 7 of the SAG. Annual leave entitlement should mainly be taken during major school holidays and is subject to mutual agreement among the SSB, the base school, and the EP.

11. EPs are provided with the same paid maternity leave, sick leave, tuberculosis leave and study leave benefits as those accorded to teaching staff.

12. The base school may approve the employment of temporary replacement for an EP who has been granted paid sick leave, paid leave for other purposes, paid maternity leave, paid study leave or no-pay leave for a period not less than 30 days.

13. The base school is required to keep proper and up-to-date leave records of the EP. Such records shall be made available for inspection as and when required.

14. The base school shall observe the principles guiding leave matters as stipulated in Appendix 8 of Chapter 7 of the SAG and the respective Codes of Aid.

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3 Please refer to relevant parts of the Codes of Aid for Primary Schools, for Secondary Schools, and for Aided Schools updated in November 2012.
School-based Educational Psychology Service
Employment Status of Educational Psychologist (as of ____________)

Please complete and return this form (by fax or by mail) to EPS(HK) Section in July BEFORE the commencement of each school year (e.g. employment status form for the school year of 2016/17 should be submitted in July 2016). For changes in employment status occur during the school year, this form should be completed and returned within 2 weeks after the effective date of such changes.

Educational Psychology Service (Hong Kong) Section
Education Bureau
Room 1702, 17/F, Crocodile Center,
79 Hoi Yuen Road, Kwun Tong, Kowloon
Fax No.: 3695 0553

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<tr>
<th>EP Post (Primary / Secondary / SSS)</th>
<th>Name of EP</th>
<th>EP Rank (EPI / EPII)</th>
<th>Name of Base School</th>
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<th>EP Contacts</th>
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Name of school sponsoring body: _______________________________________________
Name of signatory: _______________________________________________
Post of signatory: _______________________________________________
Signature: _______________________________________________
Date: _______________________________________________

Official chop
Appendix V

Recommended Items for Assessment Report of Educational Psychologist

**General Information**

- Name of the organization providing the assessment service
- Personal particulars of the student
- Name of school and class level

**Main Content of the Report**

- Reason for Referral / Purpose for Evaluation
- Background Information / Developmental History / Presenting Problems
- Behavioural Observation
- Assessment Procedures / Tests Administered with Dates
- Assessment Findings / Results of Evaluation (should include analysis of the findings / interpretation of results whenever appropriate)
- Summary and Conclusion
- Recommendations
- Name and Signature of the Educational Psychologist