

SCHOOL-BASED
EDUCATIONAL PSYCHOLOGY SERVICE (SBEPS) GUIDE

EDUCATION BUREAU
(Revised in 2021)

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Chapter 1 Introduction

- 1.1 Starting from the 2008/09 school year, the 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. From the 2016/17 school year, the SBEPS has covered all public sector ordinary primary and secondary schools. The SBEPS is provided by the EDB and selected school sponsoring bodies (SSBs), with basically the same objectives and service scope.
- 1.2 The EDB has been evaluating the implementation of the SBEPS since its launching, and conducted a mid-term review in the 2011/12 school year. Based on the results of the review report and feedback from different stakeholders, the EDB has taken various improvement measures including the enhancement of funding provision, strengthening of professional support for educational psychologists (EPs) and communication among the stakeholders.
- 1.3 To strengthen the support to schools on promotion of preventive and developmental work, as well as on provision of comprehensive and regular follow-up and intervention services to students, the EDB has been providing the Enhanced SBEPS to public sector ordinary primary and secondary schools with comparatively large number of students with special educational needs progressively from the 2016/17 school year.
- 1.4 This SBEPS Guide (the Guide) is applicable for the SBEPS (including the Enhanced SBEPS). The Guide specifies the operation of the SBEPS as well as the roles and responsibilities of various stakeholders (including SSBs, base schools, participating schools, EPs, EP supervisors and the EDB). Chapters 4, 5, 8 and Appendix 3 of the Guide are only applicable to the SBEPS provided by SSBs.

Chapter 2 Objectives

The SBEPS is a comprehensive and integrated educational psychology 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 maximise their potentials and minimise their difficulties.

Chapter 3 Scope and Nature of Service

Comprehensive and Integrated Service

- 3.1 The SBEPS is delivered by qualified EPs. 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 pay regular visits to schools throughout the school year. Each full-time EP shall normally pay visits to schools for not less than 140 working days per school year¹; with the number of visit days for each school normally within the range of 18 to 22 working days, and for each school with the Enhanced SBEPS normally not less than 30 working days. The number of visit days for individual schools shall be adjusted according to the number of schools served by the EP, as well as the actual needs of the schools and the students.
- 3.3 In special circumstances, such as when vacant EP post arises temporarily, the SSB should deploy its other EPs to provide regular service for the affected schools. Under such conditions, the arrangement shall base on the principle of not less than 14 working days for each school. Should there be EP taking leave for a continuous period of 30 or more days (such as maternity leave or sick leave) but temporary replacement cannot be arranged by the SSB, the SSB should also deploy its other EPs to provide some limited support and urgent services for the affected schools during such period, based on the principle that the number of visit days shall not be less than half of that originally scheduled for the period. When similar circumstances arise in the EDB, the EDB will discuss the adjusted arrangement with schools under its support based on the same principles. When necessary, EPs may adjust the number of visit days of their named schools so that capacity can be released to support additional schools on a temporary basis.

¹ Non-full time EPs will adjust the number of school visit days per school year in proportion to the fraction of post they are employed. As EPs of the EDB have other work responsibilities, the number of school visit days they pay per school year will also be different.

Service Scope

3.4 The SBEPS shall cover three levels of support with reference to the following proportion: school system level (10%), teacher support level (40%), and student support level (50%). The proportion can be adjusted as appropriate to the needs of individual schools. Examples of service at each level as provided by school-based EPs are:

(a) School System Level

- To support schools in developing whole-school policies in catering for students with diverse educational needs such that early identification and intervention can be provided for students with learning and/or adjustment difficulties, and to facilitate schools in developing students' positive qualities
- To support schools in developing effective mechanism to meet the diverse educational needs of their students, which includes refining the data bank on students with special educational needs (SEN) and the mechanisms for early identification and referral, and to provide professional advice on the planning and reviewing of school-based support services
- To support schools in developing policy and mechanism on crisis management and provide professional advice and support on handling of school crises

(b) Teacher Support Level

- To support teachers in the early identification and intervention for students with SEN
- To provide professional advice to teachers on measures to enhance learning and teaching effectiveness in catering for students' diverse learning needs, e.g. curriculum adaptation, assessment accommodation, differentiated instructions, tiered assignments, and student behavior management strategies

- To provide professional advice to teachers and school personnel on the design and implementation of Individual Education Plan (IEP) for students in need of intensive individualised support
- To provide professional advice to teachers and guidance personnel to facilitate the planning and implementation of school-based psycho-educational programmes for students, such as reading and writing skills training for students with specific learning difficulties, executive skills training for students with attention deficit/hyperactivity disorder, social and emotional regulation training for students with autism spectrum disorders, etc.
- To collaborate with schools in conducting school-based action research related to student support as well as learning and teaching
- To equip school personnel with knowledge and skills to meet the personal, social and learning needs of students, such as conducting professional development activities

(c) Student Support Level

- To provide psycho-educational assessment for students
- To provide intervention for students directly or in collaboration with school personnel (e.g. teachers, student guidance personnel, school social worker)
- To cater for the learning and developmental needs of students by collaborating with school personnel, promoting home-school cooperation, and delivering parent training programmes

Service Nature

3.5 School personnel and EP shall jointly devise cross-year development foci and yearly targets, covering remedial, preventive and developmental natures of services based on the needs of individual schools:

(a) Remedial Work

Remedial work aims at reducing the impact of problems or dysfunction that have occurred. Examples include:

- Providing assessment services and devising appropriate support plan together with the school for students with learning and/or adjustment difficulties
- Providing individual/group intervention and training to students with SEN directly or in collaboration with school personnel, and sharing related support strategies with school personnel and parents
- Providing consultation services to teachers to cater for the special needs of students
- Collaborating with school personnel, parents and/or other professionals in the design, implementation, and review of students' IEPs
- Supporting schools in crisis management

(b) Preventive Work

Preventive work focuses on preventing problems or dysfunction from arising or providing early intervention before the problems aggravate. Examples include:

- Conducting talks on emotional health to students of target grade levels
- Organising workshops for parents on effective learning skills
- Conducting workshops for school personnel on positive behavioral management
- Assisting schools on developing or enhancing school-based crisis management policies and measures

(c) Developmental Work

Developmental work focuses on enhancement and development of positive

qualities of the school and the students. Examples include:

- Developing peer support programmes with school social worker
- Assisting school in organising parent workshops on nourishing character strengths of children
- Collaborating with school in refining discipline and guidance policies so as to help students develop proper values, foster their positive thinking and social adaptive skills such as social communication, problem-solving and resilience
- Assisting school in assessing its development needs and offering advice on school development plan

Chapter 4 Roles and Responsibilities of the School Sponsoring Body (SSB) (Only applicable to the SBEPS provided by SSB)

Implementation

- 4.1 The SSB shall provide the SBEPS to schools as assigned by the EDB. Such schools are not limited to those under the sponsorship of the SSB.
- 4.2 The SSB shall oversee and coordinate the SBEPS provided to its assigned schools in accordance with the Guide:
- (a) Set up a Steering Committee and hold regular meetings to plan and steer the SBEPS. The Steering Committee shall include at least one school head 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) Promoting experience sharing among participating schools.
 - (b) Arrange a base school under the SSB for each EP post awarded by the EDB, and ensure that each base school fulfills its responsibilities as detailed in Chapter 5 of this Guide. In case there is plan for changing of base schools, the SSB shall inform the Educational Psychology Service (Hong Kong) Section of the EDB in writing of the names of the schools concerned and the effective date, on or before 15 June of the school year prior to the effective school year for handling of the matters relating to updating of staff establishment;
 - (c) Arrange its EPs to provide service to all the participating schools as assigned by the EDB. Under normal circumstances, each school shall be served by one EP;
 - (d) In special circumstances, such as when vacant EP post arises temporarily, the SSB should deploy its other EPs to provide regular service for the affected schools. Under such conditions, the arrangement shall base on the principle of not less than 14 working days for each school. Should there be EP taking leave for a continuous period of 30 or more days (such as maternity leave or sick leave) but temporary replacement cannot be arranged by the SSB, the SSB should also

deploy its other EPs to provide some limited support and urgent services for the affected schools during such period, based on the principle that the number of visit days shall not be less than half of that originally scheduled for the period. When necessary, EPs may adjust the number of visit days of their named schools so that capacity can be released to support additional schools on a temporary basis;

- (e) Arrange effective deployment of its EPs for support during large-scale crisis in participating school necessitating immediate on-site support from EPs;
- (f) Promote team work and professional sharing among its EPs; and
- (g) Coordinate with EPs on the submission of deliverables to the EDB according to Appendix 1 “Annual Schedule of Major Tasks for Educational Psychologist” of the Guide.

4.3 In the event that the SSB fails to perform its roles and responsibilities or provide the service to the satisfaction of the Government, the EDB may withdraw the EP posts awarded to the SSB.

Quality Assurance

4.4 The SSB shall undertake quality assurance on the professional service of its EPs by appropriate means:

- (a) Ensuring that its EPs perform their duties satisfactorily according to the scope and nature of service as stated in Chapter 3, the roles and responsibilities of EP given in Chapter 7, as well as the “Annual Schedule of Major Tasks for Educational Psychologist” as specified in Appendix 1 of this Guide;
- (b) Ensuring that its EPs observe all relevant ordinances and regulations, including but not limited to the Personal Data (Privacy) Ordinance and Disability Discrimination Ordinance in their professional service;
- (c) Establishing an effective channel to obtain feedback from service users and stakeholders regularly, including but not limited to a systematic and well-defined mechanism to effectively respond to and rectify reported problems. The SSB shall coordinate and handle jointly with its base schools in case of EPs’

performance not meeting professional standards, including strengthening supervision or taking disciplinary actions when necessary; and

- (d) Arranging professional supervision for EPs. The EP supervisor shall provide regular professional supervision and support for EPs. It is suggested that each EP receives around 30 to 50 hours of professional supervision and support each school year. For less experienced EPs, it is suggested to be around 80 to 120 hours per school year. The professional supervision and support received by individual EP shall be adjusted according to the actual needs. 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 SSB shall ensure and declare to the EDB that the EP supervisor fulfills the qualification as stated in the Guide, establish a proper mechanism to evaluate the effectiveness of the supervision service, and submit the related information to the EDB.

4.5 The SSB shall set up a well-defined and effective quality assurance mechanism for the evaluation of its provision of the SBEPS. The mechanism 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 (may make reference to Appendix 2);
- (b) Holding regular review and evaluation meetings with the Steering Committee, base schools, participating schools, EPs and EP supervisors;
- (c) Facilitating school visits conducted by the EDB, including quality assurance visits; and
- (d) Participating in review meetings and sharing activities organised by the EDB to align service expectation and rectify irregularities.

Staffing Matters

4.6 The SSB shall work jointly with the base school to oversee and monitor the staffing matters of EP, including appointment, appraisal, promotion, and leave matters, and

comply with the relevant parts of the School Administration Guide and the Codes of Aid. The SSB may contact the School Development Officer of the Regional Education Office of the EDB of the respective base school for enquiries on the above matters.

- 4.7 When considering appointment and promotion of EP, the SSB shall coordinate with the base school and appoint a member in the selection panel.
- 4.8 As the EP is employed by the base school and has to provide service to the base school and other participating schools, the SSB shall, jointly with the base school, state this clearly in the EP employment contract and specify the performance appraisal structure.
- 4.9 The SSB shall inform the Educational Psychology Service (Hong Kong) Section of the EDB in writing of all staff changes including new appointment, promotion, temporary replacement, and termination of employment by completing Appendix 3 of this Guide.

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

- 4.10 The SSB shall, jointly with the base school, ensure that all test tools and protocols are properly handled by qualified EP. In case of EP leaving the service, the SSB shall work jointly with the base school to properly keep and lock up all test tools and protocols until the next EP takes up the duty.
- 4.11 The SSB shall, jointly with the base school and the EP, ensure that all documentation related to the referred cases are treated as ‘restricted’ documents, and that all personal data is protected in accordance with the Personal Data (Privacy) Ordinance and related measures of the EDB, as well as handle applications for copy of reports by parents/guardians/students concerned (with the exception of mentally incapacitated persons) and relevant professionals/agencies accordingly.
- 4.12 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 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 disclosure of the data.

- 4.13 The SSB shall, jointly with its base school and the EP, take appropriate information security measures by making reference to the “IT Security Guidelines” and the “Information Security Incident Handling Guidelines” of the Office of the Government Chief Information Officer, as well as the EDB’s recommended practices on IT security in schools.
- 4.14 Together with the base school and the EP, the SSB shall manage and record all resources (e.g. resource package) obtained in the name of the organisation for the provision of the SBEPs. These resources should be held by the SSBs. In case of EP leaving the service, the base school shall properly keep the pertinent resources and inventory record until the next EP takes up the duty.

Chapter 5 Roles and Responsibilities of the Base School (Only applicable to the SBEPs provided by SSB)

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 SSB.
- 5.2 The base school shall work jointly with the SSB to oversee and monitor the staffing matters of EP, including appointment, appraisal, promotion, and leave matters, and comply with the relevant parts of the School Administration Guide and the Codes of Aid. The base school may contact its respective School Development Officer of the Regional Education Office of the EDB for enquiries on the above matters.
- 5.3 The base school shall inform its respective Regional Education Office of the EDB of all changes related to EP employment status, 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 Education Bureau Circular No. 10/2015 “Payment of Salaries Grant for Teaching Staff and Non-teaching Staff in Aided Schools” for details.
- 5.4 When considering appointment and promotion of EP, the base school shall appoint a selection panel to handle the application. The selection panel shall involve the SSB and other key stakeholders, such as the EP supervisor, member of the Steering Committee and representative(s) of participating schools.
- 5.5 As the EP is employed by the base school and has to provide service to 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 performance appraisal structure.

Implementation and Quality Assurance

- 5.6 The base school shall work together with the SSB in ensuring that the EP performs duties according to Chapter 7 of the Guide. The base school shall maintain close communication with the SSB and provide feedback and comments to the SSB on service quality. The base school shall coordinate and handle jointly with the SSB in

case of EPs' performance not meeting professional standards.

- 5.7 Under special circumstances, such as when vacant EP post arises temporarily, at times of large-scale crisis in participating school necessitating immediate on-site support from EPs, the base school shall communicate with the SSB, EP, EP supervisor, and affected participating schools to discuss appropriate contingency arrangement.

Matters on the Use of Grants

5.8 One-off Set Up Grant

- (a) The EDB provides each base school with a one-off set up grant for each newly awarded EP post on a reimbursement basis. The grant is subject to adjustment in accordance with the annual movement of the Composite Consumer Price Index (CCPI). The base school shall utilise the grant within 12 months in which the first EP is appointed to the given post for the purchase of (i) furniture; (ii) test tools and protocols; (iii) reference books; (iv) educational programmes and packages; and (v) information technology equipment; and submit the original invoice and receipt to apply for reimbursement within the timeline.
- (b) The base school shall observe all the relevant rules and regulations governing accounting and financial management of the School Administration Guide as well as keep proper inventory of all purchased items.

5.9 The SBEPS Grant

- (a) Each base school is provided with the SBEPS Grant on a recurrent basis for meeting the operating expenses of the service. The grant is subject to adjustment in accordance with the annual movement of the CCPI. The SBEPS Grant is put under the Special Domain of the Operating Expenses Block Grant or as a school-specific grant under the Expanded Operating Expenses Block Grant. The base school should refer to the relevant circular memorandum issued by the EDB each year for the revised rate of the SBEPS Grant.
- (b) The base school shall ensure that this Grant is used for SBEPS-related expenditures including:

- (i) Fees for professional supervision and support
 - 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 shall provide regular professional supervision and support for EPs. It is suggested that each EP receives around 30 to 50 hours of professional supervision and support each school year. For less experienced EPs, it is suggested to be around 80 to 120 hours per school year. The supervision and support received by individual EP shall be adjusted according to the actual needs.
 - The EP supervisor shall also support and facilitate the SSB in implementing and developing the SBEPS.
 - (ii) Fees for service coordination
 - Coordinating with the participating schools, such as organising meetings and sharing activities, as well as handling enquiries
 - Providing clerical support for EP such as stocktaking deliverables for submission to the EDB, filing, record management, and handling application for copy of reports
 - (iii) General expenses, such as printing and stationery, consumable stores, office utilities, replenishment of furniture and equipment, etc.
- (c) For the deployment of the SBEPS Grant, the base school shall observe the general principles and rules, as well as the financial and accounting requirements as specified in the “Operating Expenses Block Grant User Guide for Aided Schools”/ “Expanded Operating Expenses Block Grant User Guide for Aided Schools which have established an Incorporated Management Committee (IMC)”.

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

- 5.10 The base school shall, jointly with the SSB, ensure that all test tools and protocols are properly handled by qualified EP. In case of the EP leaving the service, the base school shall work jointly with the SSB to properly keep and lock up all the test tools and protocols until the next EP takes up the duty.
- 5.11 The base school shall, jointly with the SSB and the EP, ensure that all documentation related to the referred cases are treated as ‘restricted’ documents, and that all personal data is protected in accordance with the Personal Data (Privacy) Ordinance and related measures of the EDB, as well as handle applications for copy of reports by parents/guardians/students concerned (with the exception of mentally incapacitated persons) and relevant professionals/agencies accordingly. Under normal circumstances, the base school shall not duplicate or re-distribute the reports without the consent of the SSB.
- 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 disclosure of the data.
- 5.13 The base school shall, jointly with the SSB and the EP, take appropriate information security measures by making reference to the “IT Security Guidelines” and the “Information Security Incident Handling Guidelines” of the Office of the Government Chief Information Officer, as well as the EDB’s recommended practices on IT security in schools.
- 5.14 Together with the SSB and the EP, the base school shall manage and record all resources (e.g. resource package) obtained in the name of the organisation for the provision of the SBEPs. These resources should be held by the SSB. In case of EP leaving the service, the base school shall properly keep the pertinent resources and inventory record until the next EP takes up the duty.

Chapter 6 Roles and Responsibilities of the Participating School

- 6.1 The participating school shall be committed to developing its capacity to cater for students' diverse educational needs with reference to the objectives, service scope and nature of the SBEPS as stated in Chapters 2 and 3 of this Guide. Participating school receiving the Enhanced SBEPS shall make more effective use of the resources and actively collaborate with the EP towards strengthening of preventive and developmental work, as well as provision of regular follow-up and intervention services to its students.
- 6.2 The participating school shall arrange relevant school personnel (including the school head/deputy head, the Special Educational Needs Coordinator (SENCO) etc.) to collaborate with the EP actively and effectively in planning and reviewing the SBEPS according to the development needs of the school. Cross-year development foci may also be set during service planning, which helps foster the continuity of the SBEPS.
- 6.3 The participating school shall ensure that the SBEPS covers different levels of support. The EP shall allocate his/her professional time spent on each school with reference to the following suggested proportion: school system level (10%), teacher support level (40%) and student support level (50%). The proportion can be adjusted as appropriate to the needs of individual schools.
- 6.4 To ensure the SBEPS can effectively cover different levels of work, the participating school is responsible for the following work:
 - (a) At the school system level, the participating school shall regularly discuss and review with the EP its policies and measures as necessary (such as whole-school policies, mechanism of early identification and intervention, accommodation arrangements, crisis management mechanism, etc.) in catering for students' diverse educational needs.
 - (b) At the teacher support level, the participating school shall work with the EP in continual strengthening of teachers' capacity to cater for the diverse educational needs of students, such as by arranging the EP to conduct professional staff development activities for teachers on relevant topics, consulting the EP on the design and implementation of IEP, etc.

- (c) At the student support level, the participating school shall collaborate with the EP to make every effort in providing necessary support to students and parents:
- To discuss with and consult the EP before making referral for psycho-educational assessment and/or intervention services.
 - To conduct meeting with the EP as soon as possible (within 3 to 4 months) after the EP completes assessment for the student, with participation from different stakeholders (including relevant subject/class teachers, parents, etc.) to jointly discuss and devise the support plan for the student. The participating school shall also provide a copy of the meeting notes for the EP's documentation.
 - When the EP conducts student group or parent training activity, the participating school shall arrange school personnel to collaborate with the EP on the planning and conduct of the training, as well as on discussion of follow-up work, to ensure knowledge and skills are exchanged, and to sustain the effect of the training.
- 6.5 The participating school shall designate a staff member, preferably the SENCO or the Special Educational Needs Support Teacher, to coordinate the EP's work at school. The designated personnel shall reserve time to meet with the EP during each school visit for discussion of student progress as well as planning and arrangement of work. Regarding the arrangement of daily work schedule, it is recommended to reserve time for the EP to make record of the main points regarding meeting with students or parents for the day, or to perform other preparation work.
- 6.6 The participating school shall provide a suitable room for the EP to conduct assessment and a cabinet with lock during the EP's school visits.
- 6.7 The participating school shall, jointly with the SSB/EDB and the EP, handle the applications for copy of reports by parents/guardians/students concerned (with the exception of mentally incapacitated persons) and the relevant professionals/agencies in accordance with the Personal Data (Privacy) Ordinance and related measures of the EDB. Under normal circumstances, the participating school shall not duplicate or re-distribute the reports without the consent of the SSB/EDB.

- 6.8 The participating school shall take all practicable steps to ensure that the students' personal data shall not be kept longer than is necessary for the fulfillment of the purpose (including any directly related purpose) for which the data are or are to be used in accordance with the Personal data (Privacy) Ordinance and related measure of the EDB. The participating school shall devise relevant policy and measure to destruct students' assessment report within a reasonable period properly and securely.
- 6.9 The participating school shall keep a log of the EP visits and make it available to the EDB when required.
- 6.10 In special circumstances, such as when vacant EP post arises temporarily, the SSB shall deploy its other EPs to provide regular service for the affected schools. Under such conditions, the arrangement shall base on the principle of not less than 14 working days for each school. Should there be EP taking leave for a continuous period of 30 or more days (such as maternity leave or sick leave) but temporary replacement cannot be arranged by the SSB, the SSB should also deploy its other EPs to provide some limited support and urgent services for the affected schools during such period, based on the principle that the number of visit days shall not be less than half of that originally scheduled for the period. When similar circumstances arise in the EDB, the EDB will discuss the adjusted arrangement with schools under its support based on the same principles. When necessary, EPs may adjust the number of visit days of their named schools so that capacity can be released to support additional schools on a temporary basis. The participating school shall facilitate the above arrangements when they become necessary.
- 6.11 In case of cancellation of school visits due to reasons such as urgent need for the EP to support crisis management in another school², sick leave or school suspension, it is not always possible for the EP to reschedule a make-up school visit. The participating school may need to adjust work arrangements with the EP in these instances. Schools may liaise with the SSB/EDB when necessary.
- 6.12 The participating school shall maintain close communication with the SSB/EDB and provide timely feedback and comments on the service quality and EP performance

² For the definition of school crisis, impact assessment and crisis intervention and support, please refer to the "School Crisis Management Intervention and Psychological Support in the Aftermath of Crises Handbook".

whenever required.

- 6.13 For school visits conducted by the EDB, including quality assurance visits, the school head shall attend with related personnel (including deputy head, SENCO/members of the Student Support Team, etc.) to jointly review the implementation of the service with officers of the EDB. Schools shall also facilitate the enhancement of service effectiveness according to the suggestions made by officers of the EDB.
- 6.14 The participating schools shall complete and submit to the EDB the “SBEPS Effectiveness Evaluation Questionnaire” at the end of the school year.

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 in accordance with the Guide. EPs providing the Enhanced SBEPS shall collaborate with the school more actively, towards strengthening schools' preventive and developmental work, as well as to providing regular 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 stage of development in catering for student diversity, the EP shall meet with the school head and school personnel concerned (including deputy head, SENCO etc.) of each school to conduct needs assessment and plan the service prior to the launching of the SBEPS for each school year.
- 7.3 After the meeting(s), the EP and the school personnel concerned shall jointly work out the annual work plan and visit schedule for each school.
- 7.4 The EP shall ensure that the SBEPS delivered to each school is of a comprehensive nature, appropriately encompassing developmental, preventive and remedial work. The EP shall allocate his/her professional time spent on each school with reference to the following suggested 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 needs 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 school according to the agreed visit schedule. Each full-time EP shall normally pay visits to schools for not less than 140 working days per school year³.

³ Non-full time EPs will adjust the number of school visit days per school year in proportion to the fraction of post they are employed. As EPs of the EDB have other work responsibilities, the number of school visit days they pay per school year will also be different.

- 7.7 The EP shall submit service documents to the EDB according to “Annual Schedule of Major Tasks for Educational Psychologist” as in Appendix 1 of the Guide. The EP shall also co-work with the school on the implementation of the SBEPS based on the “Reference Indicators for Review of the SBEPS Effectiveness” in Appendix 2 of the Guide.
- 7.8 The EP shall reserve 5 to 6 working days on average per month as non-school visit days for writing reports, preparing for service-related work, participating in meetings, receiving supervision, attending sharing and networking activities organised by the EDB, and continuing professional development.
- 7.9 When a school has a crisis event⁴, the EP should treat it with priority by visiting the school as soon as possible to render crisis intervention and support service. When necessary, the EP shall follow the deployment of the SSB/EDB to provide crisis support services to other schools.
- 7.10 The EP shall observe the Code of Professional Conduct of the Hong Kong Psychological Society and all ordinances and regulations relevant to the service, including but not limited to the Disability Discrimination Ordinance and the Personal Data (Privacy) Ordinance.

Assessment Protocol

- 7.11 The EP shall make every effort to observe the following performance pledge⁵:
- (a) Prior to handling referrals from school, the EP shall obtain written referral from school together with “Consent Form for Receiving School-based Educational Psychology Service”;
 - (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 complicated cases if necessary (e.g. those with severe emotional or behavioral problems);

⁴ For the definition of school crisis, impact assessment and crisis intervention and support, please refer to the “School Crisis Management Intervention and Psychological Support in the Aftermath of Crises Handbook”.

⁵ The time EP needed for completion of assessment and various documentation will depend on the amount of other work and number of cases the EP needs to handle in the corresponding period of time. The EP will also prioritize his/her work based on needs, therefore the service provided by the EP may be adjusted in individual circumstances.

- (c) Upon receipt of the referrals, the EP shall arrange assessment for the student with the school as soon as possible;
- (d) For every student given individual assessment, the EP shall participate in the post-assessment meeting held by the school, explain to parents and school personnel the assessment results, and jointly discuss the support measures for the student;
- (e) For every case given psychometric assessment, the EP shall provide parents with an Assessment Summary containing key information such as intellectual functioning, learning difficulties and recommendations for support⁶;
- (f) For every student referred for assessment, the EP shall send a copy of the Educational Psychologist's report (see Appendix 4 for recommended items for assessment report) with a cover letter to the school concerned for documentation and follow-up⁷; and
- (g) 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

7.12 The EP shall keep proper documentation of all referrals. Such documentation shall include the written referral from school, "Consent Form for Receiving School-based Educational Psychology Service", Educational Psychologist's report (original with signature)/the relevant Annex to the "Applications for Special Examination Arrangements from Candidates with special needs Application Guide" issued by the EP to the Hong Kong Examinations and Assessment Authority/ summary of the recommendations on special examination arrangements, Assessment Summary (if applicable), reply letter, consultation record, test protocol as well as other documents containing students' personal information.

7.13 The EP shall ensure that the documentation of referrals is treated as 'restricted'

⁶ The Assessment Summary will normally be issued within three months after the completion of the assessment.

⁷ The Educational Psychologist's report will normally be issued within six months after the post-assessment meeting. For cases applying for special arrangements in the Hong Kong Diploma of Secondary Education Examination, EPs shall issue one of the following: assessment report, the relevant Annex to the "Applications for Special Examination Arrangements from Candidates with special needs Application Guide" of the Hong Kong Examinations and Assessment Authority, or a Summary on SEA recommendations.

documents, and that all personal data is protected in accordance with the Personal Data (Privacy) Ordinance and related measures of the EDB, as well as handle applications for copy of reports by parents/guardians/students concerned (with the exception of mentally incapacitated persons) and relevant professionals/agencies accordingly. 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).

- 7.14 The EP shall observe the Code of Professional Conduct of the Hong Kong Psychological Society. For handling of test materials, protocols and professional reports, the EP shall make reference to the pertinent guidelines of the Code of Professional Conduct.
- 7.15 The EP shall take appropriate information security measures by making reference to the “IT Security Guidelines” and the “Information Security Incident Handling Guidelines” from the Office of the Government Chief Information Officer, as well as the EDB’s recommended practices in IT security in schools. EP should report to the SSB/senior management immediately when there is a loss of student personal information.
- 7.16 The EP of the SSB shall properly keep resources (e.g. resource package) obtained in the name of the SSB for the provision of the SBEPS, and to return such resources to the SSB in good condition upon leaving the service.

Chapter 8 Roles and Responsibilities of the EP Supervisor (Only applicable to the SBEPS provided by SSB)

- 8.1 The EP supervisor shall assist and facilitate the development of the SBEPS under the SSB concerned in accordance with the government policies, as well as provide professional supervision to EPs.
- 8.2 The EP supervisor shall assist the SSB in coordinating the SBEPS and in reviewing the service quality, provide professional views for SSB's reference on the employment, appraisal and promotion of EPs, as well as the deployment of EPs in case of school crisis or service interruptions.
- 8.3 The EP supervisor shall provide regular professional supervision and support for EPs. It is suggested that each EP receives around 30 to 50 hours of professional supervision and support each school year. For less experienced EPs, it is suggested to be around 80 to 120 hours per school year. The supervision and support received by individual EP shall be adjusted according to the actual needs. The scope of EP supervision can cover the following areas:
 - (a) Provide consultation on school system level, e.g. educational policies and measures, student support system and policies, crisis management, etc.;
 - (b) Provide consultation on teacher support level, e.g. learning and teaching, planning and implementation of IEPs, teacher training and action research;
 - (c) Provide consultation on case work, e.g. assessment and intervention skills, report writing, consultation skills, and provide more intensive support on handling complicated cases;
 - (d) Scrutinize documents related to the SBEPS, such as Annual Work Plan, Annual Progress Report, assessment reports etc.;
 - (e) Provide consultation on professional issue and development, e.g. development of professional skills for individual EPs, establishment of collaborative relationships with stakeholders, ethical issues, latest development and research in education and psychology; and
 - (f) Provide special coaching to EPs in need.

8.4 The mode of supervision shall include regular supervision meetings conducted individually or in small group; consultation on ad-hoc issues or urgent cases, as well as individual coaching and on-site support wherever deemed necessary, e.g. for service coordination, crisis management, management of complicated cases, consultation meeting with school personnel, etc.

Chapter 9 Roles and Responsibilities of the Education Bureau

Overseeing, Monitoring, and Quality Assurance

9.1 The EDB shall:

- (a) Collect and scrutinize the various work documents submitted by the EPs;
- (b) Collect and scrutinize the information submitted by SSBs on the effectiveness of professional supervision service;
- (c) Collect feedback from different stakeholders for service planning; and
- (d) Conduct visits to schools, including quality assurance visits, focusing on the following areas:
 - (i) Launching, coordinating and monitoring of the SBEPS by the SSB and its base schools;
 - (ii) Implementation of the SBEPS in the participating schools and the collaboration between school-based EPs, school personnel and related designated specialist (e.g. school social worker); and
 - (iii) Service delivery of the EPs.

Steering and Leading the Continuous Development of the SBEPS

9.2 The EDB shall also:

- (a) Conduct meetings with SSBs to share experiences, review service implementation, and plan for service expansion;
- (b) Conduct briefings for EPs and EP supervisors to align service requirements and expectation;
- (c) Hold EP network and EP supervisor meetings regularly to ensure consistency in professional practices;
- (d) Arrange professional sharing and development activities for EPs, as well as case conferences with psychiatrists on regular basis; and
- (e) Conduct joint school sharing regularly and invite participating schools to share their experience in implementing the SBEPS.

Annual Schedule of Major Tasks for Educational Psychologist

The annual major tasks and schedule for EP are illustrated below:

Description of Tasks	Time Period				
	Sep – Oct	Nov – Dec	Jan – Feb	Mar – May	Jun - Aug
(a) Provide SBEPS to schools regularly	✓	✓	✓	✓	✓
(b) Make overall planning and preparation of the SBEPS	✓				
(c) Hold meeting with school head and related personnel to conduct school needs assessment and to draw up an annual work plan	✓				
(d) Submit annual work plan to the EDB ⁸	✓				
(e) Submit annual visit schedule to the EDB	✓				
(f) Conduct mid-year review with school personnel			✓		
(g) Submit mid-year review report to the EDB ⁸			✓		
(h) Conduct end-of-year review with school head and related personnel					✓
(i) Submit SEMIS Data Input Forms on cases handled to the EDB ⁹					✓
(j) Submit the SBEPS Effectiveness Evaluation Questionnaire to the EDB					✓
(k) Submit Annual Progress Report to the EDB					✓
(l) Make overall planning and preparation of the SBEPS for the following school year					✓

⁸ Normally applicable to EPs providing SBEPS for the first year.

⁹ Should data be submitted through the SBEPS Data Input System, submission can be made throughout the year with designated dates for completion of input of various data.

Reference Indicators for Review of the SBEPS Effectiveness

The SBEPS encompasses support on the school system, teacher support, and student support levels, aiming to empower schools to cater for students' diverse educational needs. The SSB could, making reference to the following indicators, conduct annual review with stakeholders on the overall implementation and effectiveness of the service, as well as to plan for the direction of service development.

Service Planning and Collaboration

1. The school personnel concerned (including the school head/deputy head, SENCO, etc.) and the EP can collaborate actively and effectively in formulating and reviewing the annual plan of the SBEPS.
2. The annual plan of the SBEPS is in concert with the development needs of the school.

School System Level

3. The service can facilitate school to formulate and review its whole-school policies and measures, to promote an inclusive school culture, with the objective of catering for students with diverse educational needs. Examples include formulating and reviewing school-based policies on integrated education, discipline and guidance policies, or accommodation policies.
4. The service can facilitate school to formulate and review its student support mechanisms. Examples include refining the data bank on students with special educational needs, establishing mechanisms for early identification and referral, providing professional views to the Student Support Team on the planning and reviewing of school-based support services.
5. The service can facilitate school to develop and review its crisis management policies and mechanisms, and to provide professional views and support on managing school critical incidents.

Teacher Support Level

6. The service can provide effective consultation to teachers on the learning, emotional and behavioural needs of individual students, e.g. discussing students' needs and formulating support plan in case meetings or IEP meetings.
7. The service can provide effective consultation regarding specific groups of students (e.g. students with the same special educational need/developmental need, or students of a specific class level) or all students, aiming at enhancing the effectiveness of learning and teaching or strengthening the emotional and behavioural support for students.
8. The service can facilitate school personnel to uphold a proactive and positive attitude, enhance their knowledge and skills to cater for students with diverse educational needs, e.g. conducting professional development activities for teachers according to the school's needs.
9. Through providing consultation to different teams of the school, the service can enhance teachers' ability in catering for students' diverse educational needs. Examples include reviewing learning and teaching strategies with the Curriculum Team, promoting positive behaviour management in collaboration with the Guidance and Discipline Team, etc.

Student Support Level

10. The EP can provide appropriate psychoeducational assessment to students in order that school personnel and parents can formulate suitable support plans according to students' needs.
11. The EP can, directly or through collaboration with school personnel, provide appropriate individual counselling or training for students with severe adjustment difficulties to improve their adaptive capacity.

12. The EP can, directly or through collaboration with school personnel, provide appropriate group counselling or training for students to improve their learning or adaptive capacity.
13. The EP can, directly or through collaboration with school personnel, provide appropriate consultation and training for parents to facilitate student development.

Employment Status of Educational Psychologist (as of _____)

(Only applicable to the SBEPS provided by SSB)

Please return the employment status of EPs for the new school year to Educational Psychology Service (Hong Kong) Section in July (e.g. Information for the school year of 2022/23 should be submitted in July 2022) by fax or by post. This form should also be completed and returned within 2 weeks after the effective date of changes in employment status occurring during the school year.

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

EP Post (Primary / Secondary / School Support Scheme)	Name of EP		EP Rank (EPI / EPII)	Name of Base School	Effective Date (Employment / Promotion / Temporary Replacement / Termination)	EP Contacts	
	English	Chinese				Telephone No.	E-mail Address

Name of school sponsoring body: _____

Name of signatory: _____

Post of signatory: _____

Signature: _____

Date: _____

Official chop of SSB

Recommended Items for Assessment Report of Educational Psychologist

General Information

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

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