



PRACTITIONER GUIDE

Step-by-step guide to using the Co-Writing Assistant

AI-assisted report drafting inside Q-global and Q-interactive, with you in full editorial control

A copilot for report writing, not a replacement for judgment

WHAT IT DOES

Creates an initial draft of clinical report narratives, organizes content across multiple assessments, and surfaces insights for your consideration.

WHERE IT RUNS

Inside Q-global and Q-interactive, so HIPAA and FERPA-based privacy controls apply, and your assessment data from the platform you are logged into is automatically available for report drafting, with no downloading or re-uploading.

You keep editorial control over interpretation, structure, and content. All clinical judgments and conclusions remain yours as the signing practitioner.

1 Access the Co-Writing Assistant

1. Log in to [Q-global](#) or [Q-interactive](#) with your Digital Assessment Library account.
2. In Q-interactive, click **Co-Writing Assistant** in the top navigation, next to **Support**.
3. In Q-global, click the **Co-Writing Assistant** tab, to the right of **Intervention Guide**.

Q-INTERACTIVE



The tab sits beside **Support**.

Q-GLOBAL



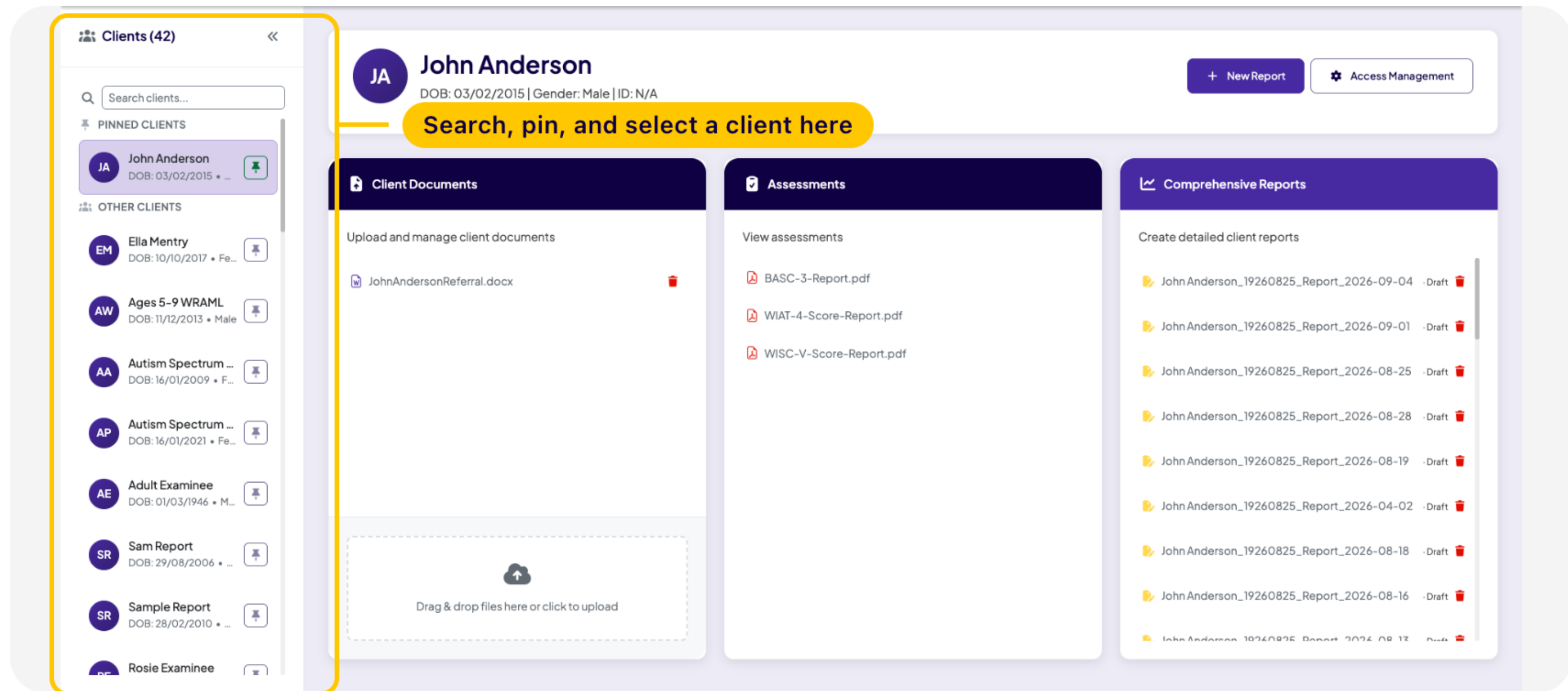
The tab sits to the right of **Intervention Guide**.

Note. The examinee roster from the platform in which you access Co-Writing Assistant from carries over automatically.

If you do not have access to the Co-Writing Assistant, follow instructions for enablement for [Q-interactive](#) or [Q-global](#).

2 Select a client

The left panel lists your clients, for example "Clients (42)." Search by name, or browse. **Pin** frequent clients so they appear under **Pinned Clients**. Click a client's name to open their profile.



3 Review the client profile

Key details sit at the top, alongside + New Report and Access Management, with three panels below.

The screenshot displays a client profile interface for John Anderson. The left sidebar shows a list of clients, with John Anderson at the top. The main content area is divided into three panels: 'Client Documents', 'Assessments', and 'Comprehensive Reports'. The 'Client Documents' panel shows a document titled 'JohnAndersonReferral.docx' and a dashed box for uploading more files. The 'Assessments' panel lists three reports: 'BASC-3-Report.pdf', 'WIAT-4-Score-Report.pdf', and 'WISC-V-Score-Report.pdf'. The 'Comprehensive Reports' panel shows a list of draft reports with dates and draft status.

Client Profile: John Anderson
DOB: 03/02/2015 | Gender: Male | ID: N/A

Buttons: + New Report, Access Management

Upload client documents

Client Documents
Upload and manage client documents

JohnAndersonReferral.docx

Drag & drop files here or click to upload

Synced score reports

Assessments
View assessments

- BASC-3-Report.pdf
- WIAT-4-Score-Report.pdf
- WISC-V-Score-Report.pdf

This client's report drafts

Comprehensive Reports
Create detailed client reports

- John Anderson_19260825_Report_2026-09-04 - Draft
- John Anderson_19260825_Report_2026-09-01 - Draft
- John Anderson_19260825_Report_2026-08-25 - Draft
- John Anderson_19260825_Report_2026-08-28 - Draft
- John Anderson_19260825_Report_2026-08-19 - Draft
- John Anderson_19260825_Report_2026-04-02 - Draft
- John Anderson_19260825_Report_2026-08-18 - Draft
- John Anderson_19260825_Report_2026-08-16 - Draft
- John Anderson_19260825_Report_2026-08-13 - Draft

What each panel is for

Client Documents

Upload and manage supporting material: observation notes, interview transcripts, handwritten notes, outside records. Drag and drop, or click to browse.

Assessments

Completed Q-global or Q-interactive assessments, for example WISC-V, WIAT-4, or BASC-3 score reports. Pulled in automatically from the platform you logged into.

Comprehensive Reports

Create new comprehensive evaluation reports, reopen saved drafts for this client, and delete drafts you no longer need.

Uploading documents. Drag files into the Client Documents panel or click to browse. Both Pearson assessments and non-Pearson assessments that you have the rights to are supported, and everything you upload becomes source material for the AI Content Generator.

4 Create a new report

Click **+ New Report** from the client profile, or reopen an existing draft under Comprehensive Reports.

The screenshot displays a user interface for managing client profiles. On the left, a sidebar lists 42 clients, with John Anderson at the top. The main area shows John Anderson's profile, including his name, initials (JA), and personal details (DOB: 03/02/2015, Gender: Male, ID: N/A). A yellow button labeled "Start a new report here" is prominent. To its right, a purple button labeled "+ New Report" is highlighted with a yellow border, and a grey button labeled "Access Management" is also visible. Below the profile header, there are three main sections: "Client Documents" (with an upload area and a list of documents like JohnAndersonReferral.docx), "Assessments" (with a list of assessment reports like BASC-3-Report.pdf), and "Comprehensive Reports" (with a list of draft reports). The "+ New Report" button is highlighted with a yellow border.

Client Profile: John Anderson
DOB: 03/02/2015 | Gender: Male | ID: N/A

Start a new report here — **+ New Report** — **Access Management**

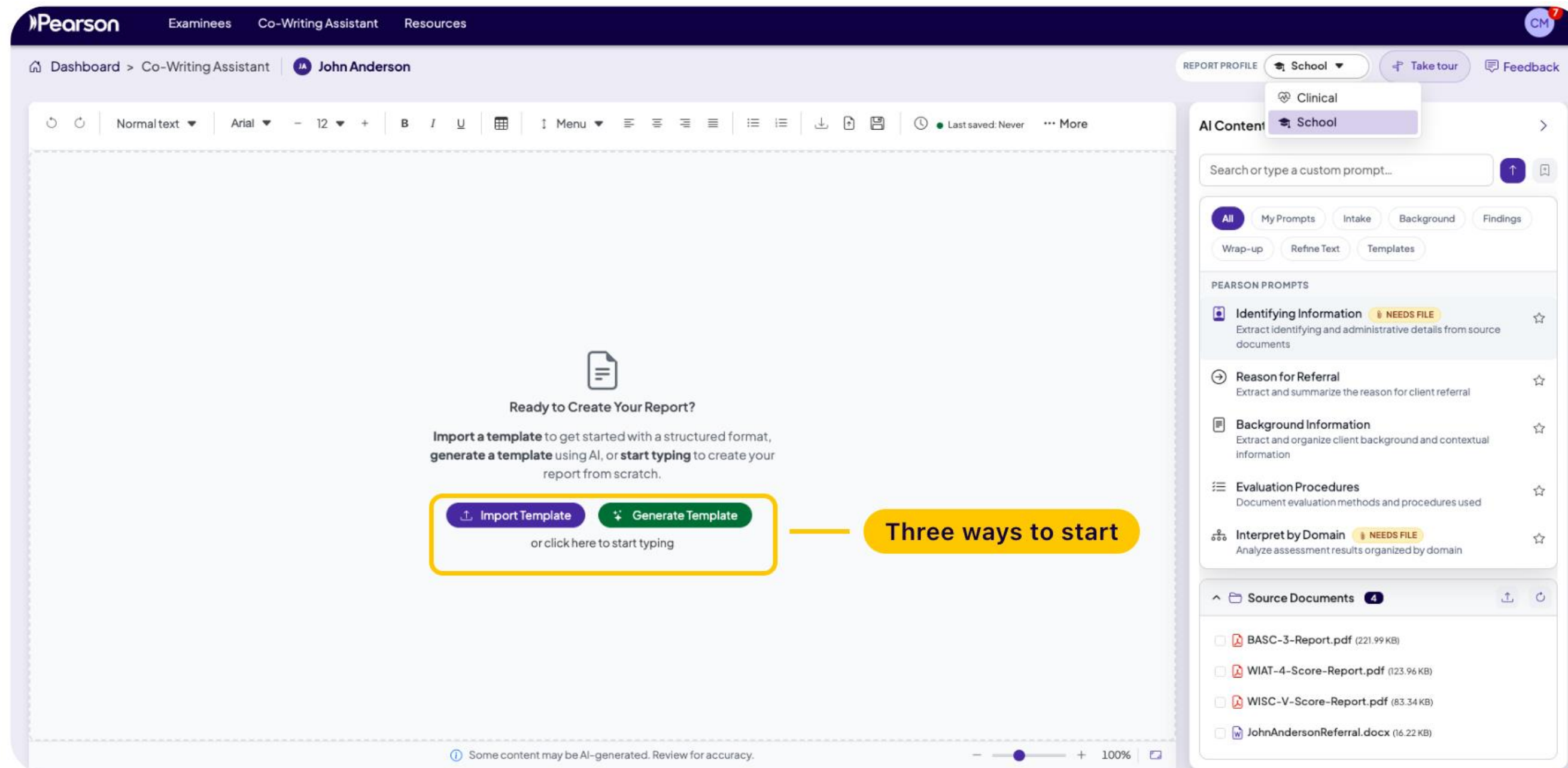
Client Documents
Upload and manage client documents
JohnAndersonReferral.docx

Assessments
View assessments
BASC-3-Report.pdf
WIAT-4-Score-Report.pdf
WISC-V-Score-Report.pdf

Comprehensive Reports
Create detailed client reports
JohnAnderson_19260825_Report_2026-09-04 - Draft
JohnAnderson_19260825_Report_2026-09-01 - Draft
JohnAnderson_19260825_Report_2026-08-25 - Draft
JohnAnderson_19260825_Report_2026-08-28 - Draft
JohnAnderson_19260825_Report_2026-08-19 - Draft
JohnAnderson_19260825_Report_2026-04-02 - Draft
JohnAnderson_19260825_Report_2026-08-18 - Draft
JohnAnderson_19260825_Report_2026-08-16 - Draft
JohnAnderson_19260825_Report_2026-08-13 - Draft

Three ways to start

- **Import Template.** Work inside the structure your practice or district already uses. DOCX and PDF are supported.
- **Blank canvas.** Click into the document and start typing.
- **Generate Template.** Let the tool build a full report scaffold.



Set the report profile, then generate

The Report Profile (School or Clinical) control sits at the top right of the editor bar. This shapes the structure and tone of your generated content, including AI-generated templates.

School — for school psychologists and educational evaluations

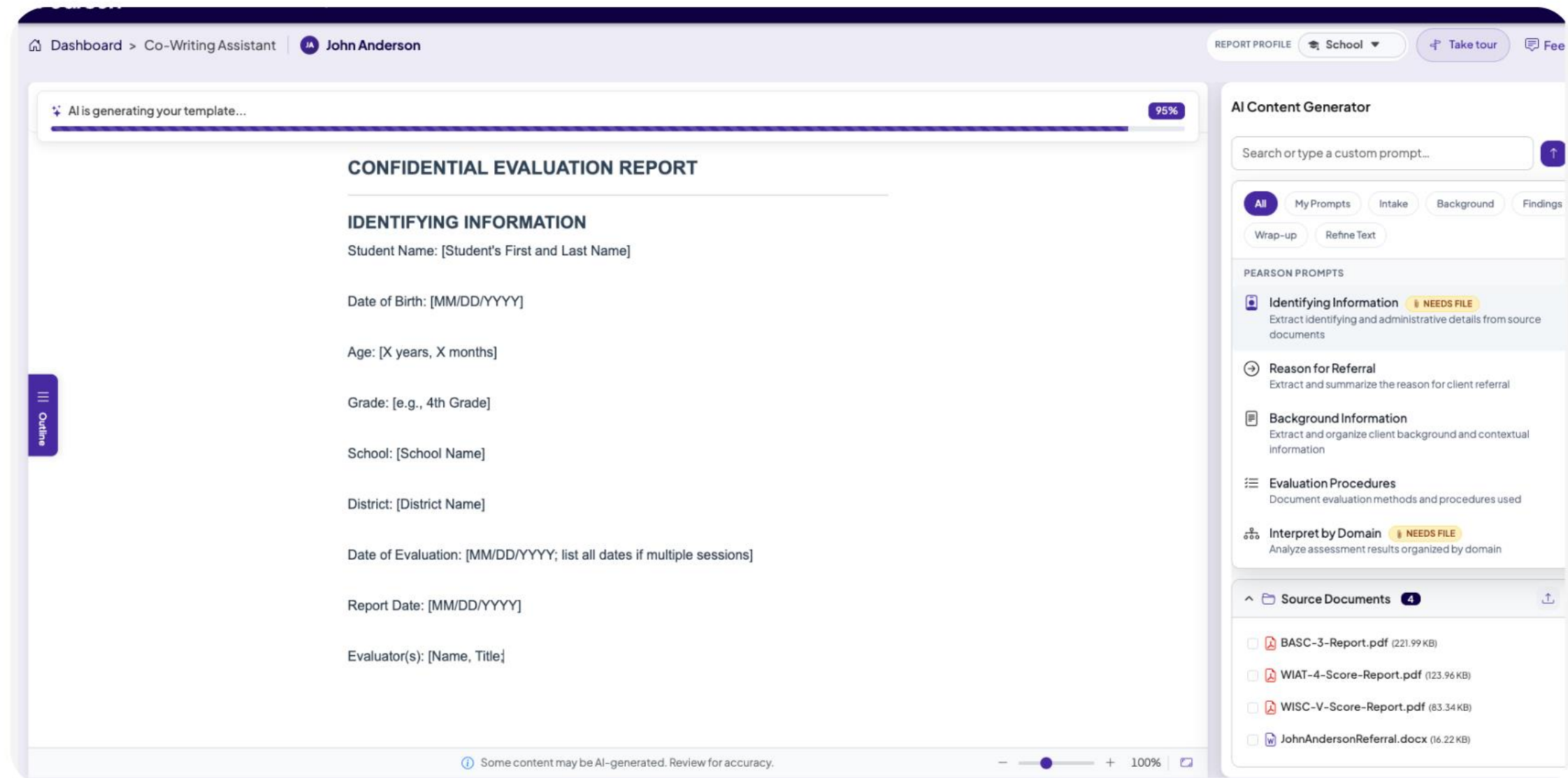
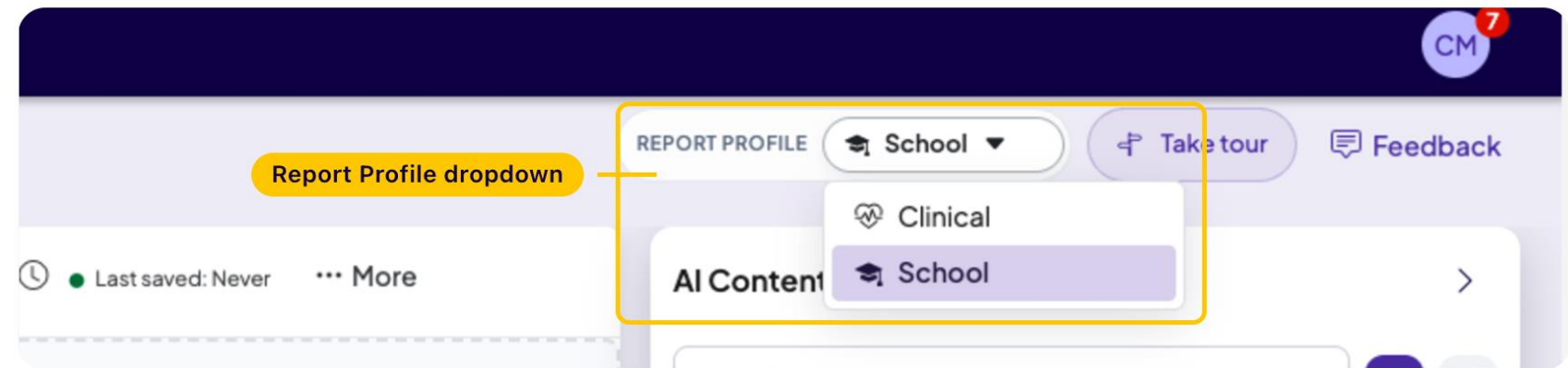
Focuses on:

- eligibility & reevaluation reports
- academic performance & learning needs
- language geared to educators, parents, and school teams

Clinical — for clinical/neuropsychologists and healthcare practitioners

Focuses on:

- diagnostic & differential diagnosis
- mental health & neuropsych assessment
- treatment planning & recommendations
- language geared to providers, patients, and families



What a generated template contains

A complete report skeleton, in the order you write it.

1

FRONT MATTER

Identifying Information
Reason for Referral

2

CONTEXT

Background Information
Behavioral Observations

3

EVIDENCE

Assessment Procedures
Assessment Results and
Interpretation
Test Results and Score
Table Appendix

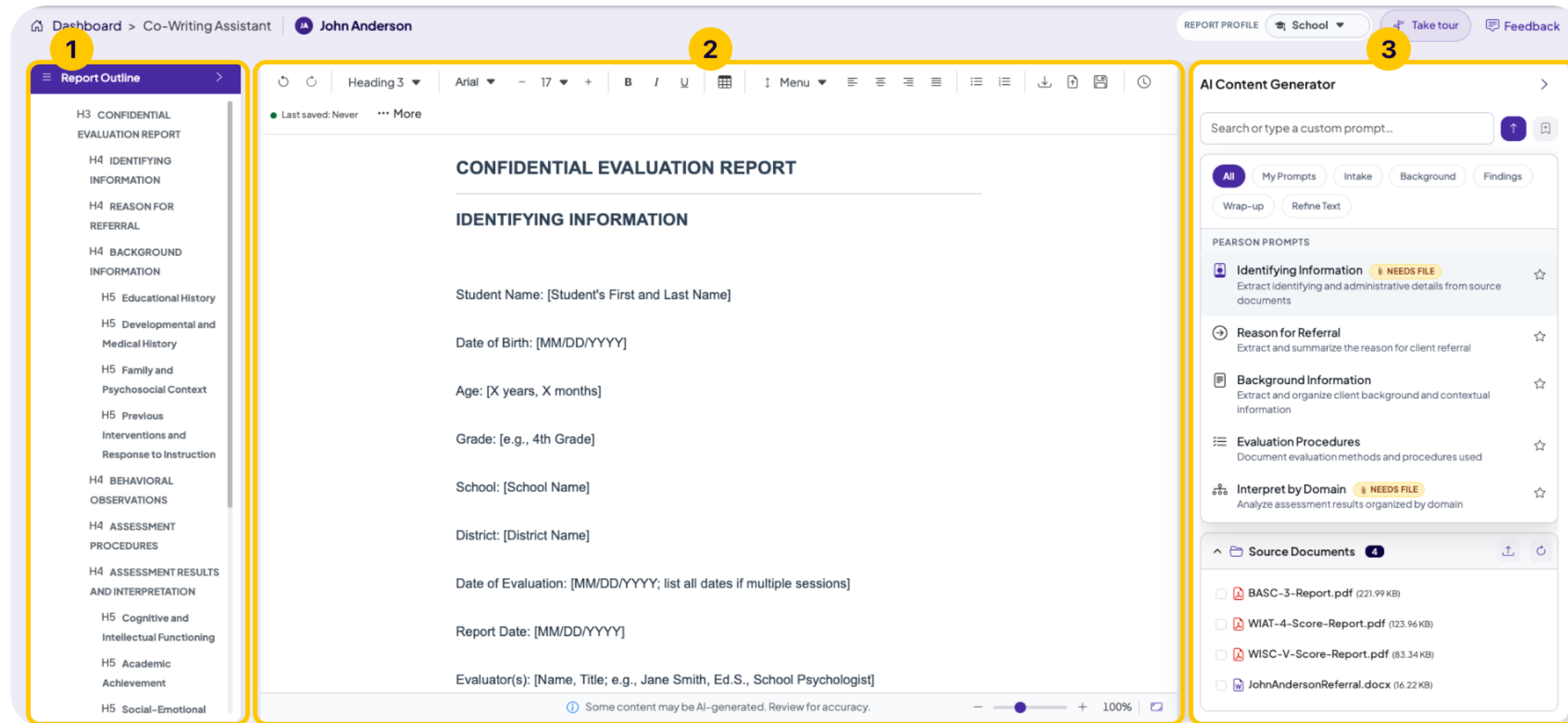
4

CLOSE

Summary and
Recommendations
Signature block
Confidentiality Notice
AI Disclosure Notice

Bracketed placeholders such as *[Student's first name]* and *[describe duration and setting]* show exactly what to fill in, and embedded guidance explains what each section may contain.

5 Get oriented in the report editor



1 Report Outline.

A navigable table of contents; click any heading to jump.

2 Document editor.

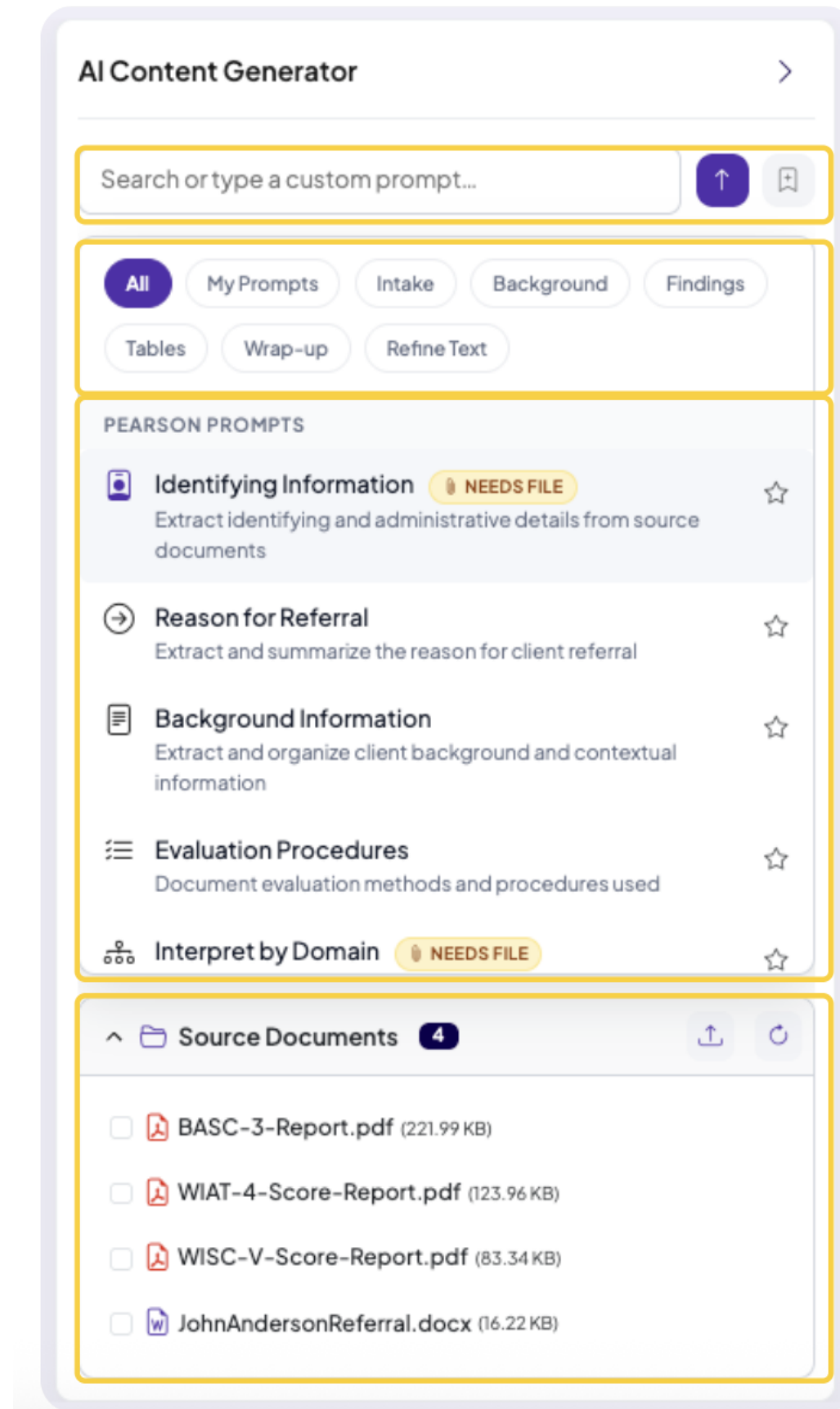
Full rich text: fonts, lists, tables, undo, download, print, save, and more. Autosaves.

3 AI Content Generator.

Run prompts, manage source documents, review responses.

A persistent reminder sits at the bottom of the editor: *Some content may be AI-generated. Review for accuracy.*

6 Use the AI Content Generator



Prompt bar. Search for a prompt, or write a custom prompt of your own. Add a source document for a custom prompt in Source Documents below, then submit or save it.

Category filters. All, My Prompts, Intake, Background, Findings, Tables, Wrap-up, and Refine Text.

Pearson prompts. A library of pre-built, Pearson-validated prompts, each with a one-line description. Star one to pin it for quick access; a **NEEDS FILE** badge means source documents must be selected first.

Source Documents. Score reports synced from your platform plus anything you uploaded, with a count of how many are selected. Upload or refresh without leaving the editor.

Pearson prompts

A library of pre-built, Pearson-validated prompts, organized into two groups.

CONTENT GENERATION

Identifying Information

extract identifying and administrative details

Reason for Referral

extract and summarize the referral reason

Background Information

organize background and contextual information

Evaluation Procedures

document methods and procedures used

Generate Template

create a structured template to fill in

Table of Scores

creates a table from the scores reported in the source document

Interpret by Test

analyze results organized by test

Interpret by Domain

analyze results organized by domain

Summary

summarize findings and key takeaways

Recommendations

generate tailored, actionable recommendations

Parent- and Client-Friendly Summary

plain language, no scores or diagnostic labels

TEXT ENHANCEMENT

Summarize

condense the selected text

Elaborate

expand and add detail

Shorten

tighten while preserving meaning

Rephrase

rewrite with different words

Clinical Tone

adjust to clinical language

Bulletize

convert to a bulleted list

Parent-Friendly Tone

adapt language for parents

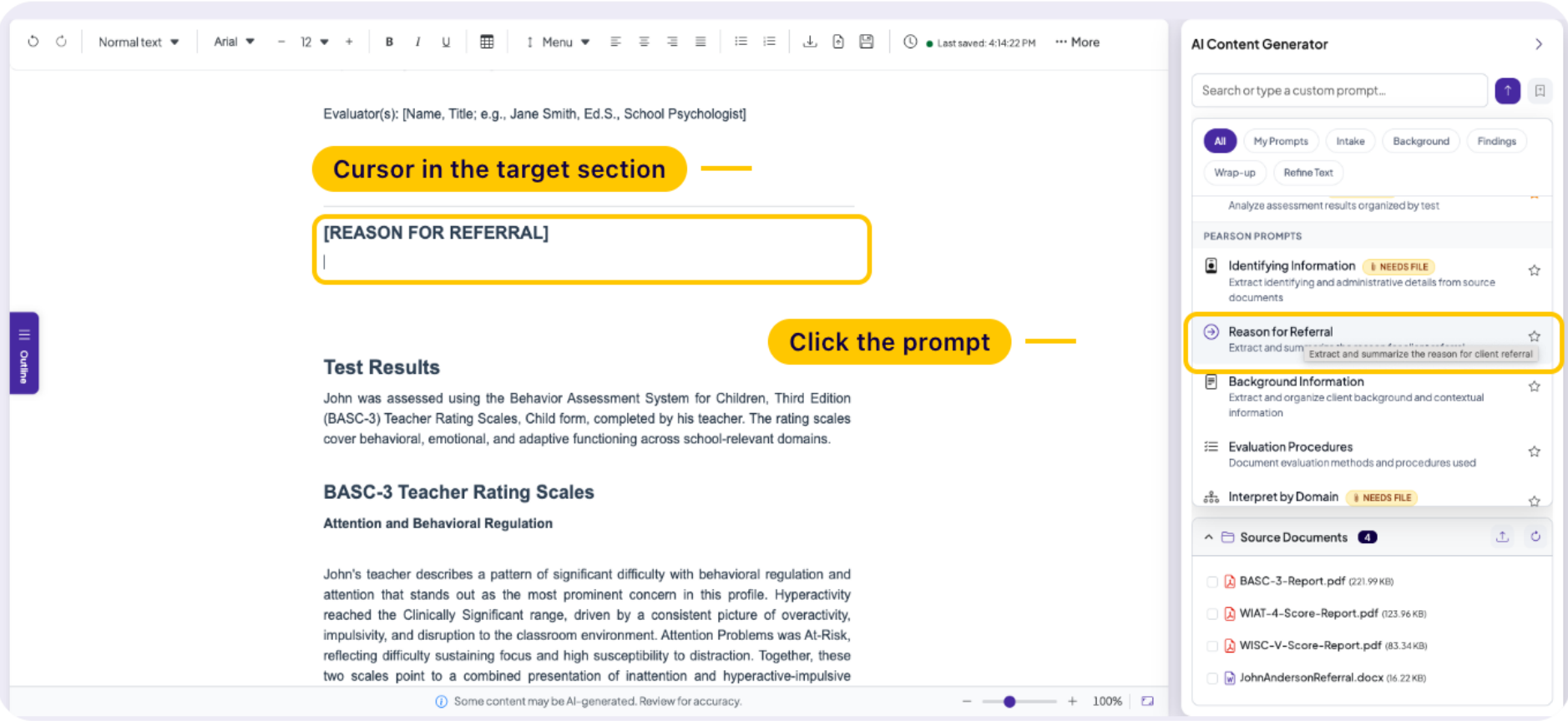
Tabulate

convert to a structured table

"NEEDS FILE" badge. Some prompts require source material. Check the documents you want the AI to draw from before running one; the panel shows how many are selected.

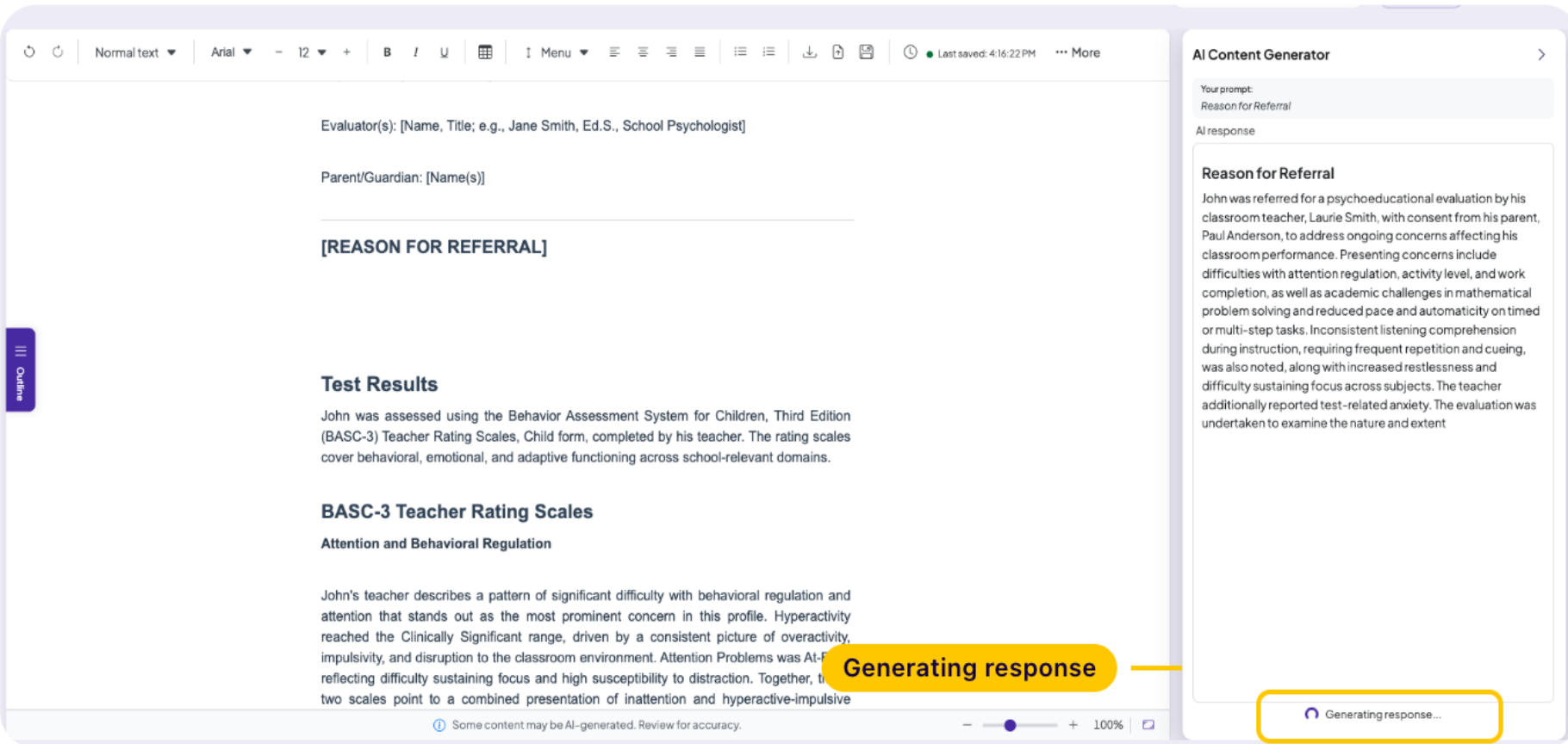
Running a prompt

STEP 1



Place the cursor where the content should land (or highlight content to replace), select your source documents, then click or type the prompt.

STEP 2



The prompt and its response stream into the panel while the document stays untouched.

Reviewing a response

Read it against the source records. A caution sits under every response: *AI generated content may be incorrect.*

Keep inserts the content at your cursor,
Copy places it on your clipboard,
Discard dismisses it.

Thumbs up or down sends feedback to the product team.

You are responsible for reviewing AI-generated content before it goes into a report.

The screenshot shows a web interface for an 'AI Content Generator'. At the top, there's a header 'AI Content Generator' with a right-pointing arrow. Below it is a text input field labeled 'Your prompt:' containing the text 'Reason for Referral'. Underneath the prompt field is a section titled 'AI response' which contains a text box with the following text: 'Reason for Referral', 'John was referred for a psychoeducational evaluation by his classroom teacher, Laurie Smith, with consent from his parent, Paul Anderson, to address ongoing concerns affecting his classroom performance. Presenting concerns include difficulties with attention regulation, activity level, and work completion, as well as academic challenges in mathematical problem solving and reduced pace and automaticity on timed or multi-step tasks. Inconsistent listening comprehension during instruction, requiring frequent repetition and cueing, was also noted, along with increased restlessness and difficulty sustaining focus across subjects. The teacher additionally reported test-related anxiety. The evaluation was undertaken to examine the nature and extent of these concerns and to inform instructional planning and support.' Below the response text box, there is a small warning icon and the text 'AI generated content may be incorrect'. To the right of this warning is a box containing two circular icons: a thumbs up and a thumbs down. At the bottom of the interface, there are three buttons: a green 'Keep' button with a checkmark icon, a 'Copy' button with a clipboard icon, and a 'Discard' button with an 'X' icon.

AI response. Read it against the source records before you use it. A caution sits under every response: *AI generated content may be incorrect.*

Thumbs up or down. Feedback for the product team; no PII.

Keep, Copy, or Discard. Insert at your cursor, copy, or dismiss.

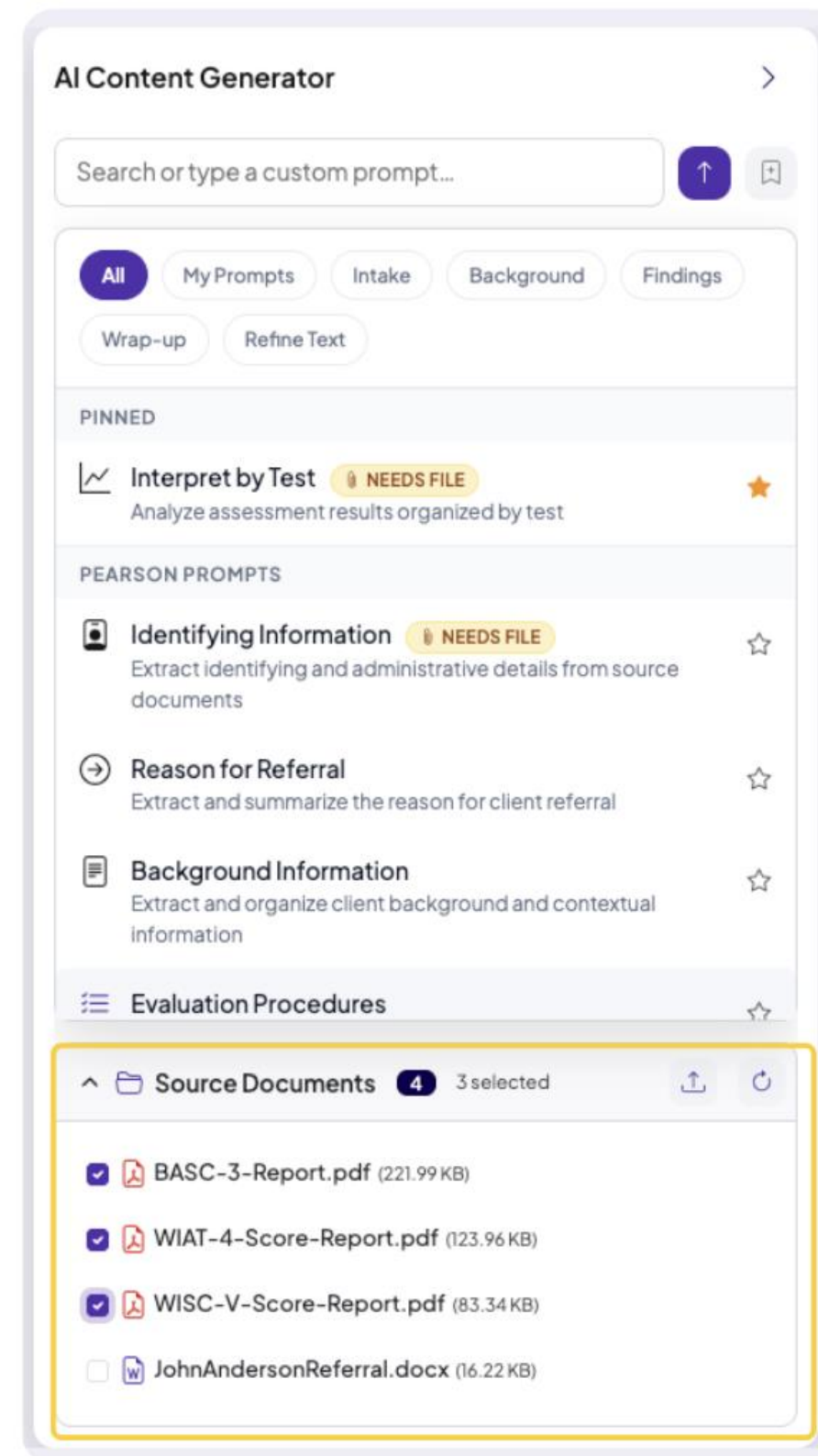
Interpreting test results

Select the instruments, run **Interpret by Test**, then review what comes back.

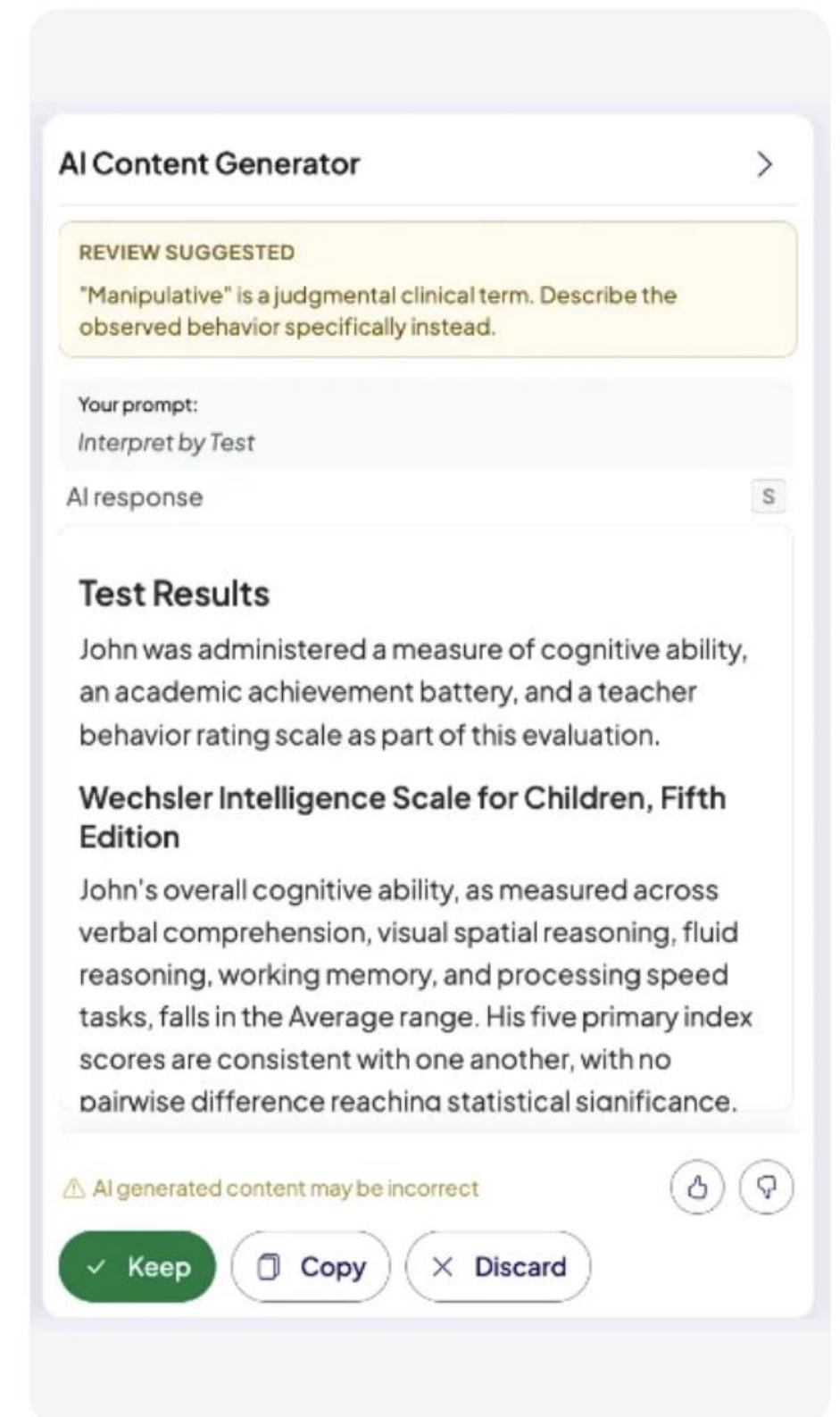
The AI analyzes results by instrument, including score classifications, index tables, and plain-language explanations of cut scores. Edit the narrative to reflect your clinical judgment.

Responses flag anything that warrants your extra attention, such as a detail missing from the source records, a result that needs corroboration, or a finding you should confirm before it goes into the report, rather than resolving it for you.

STEP 1

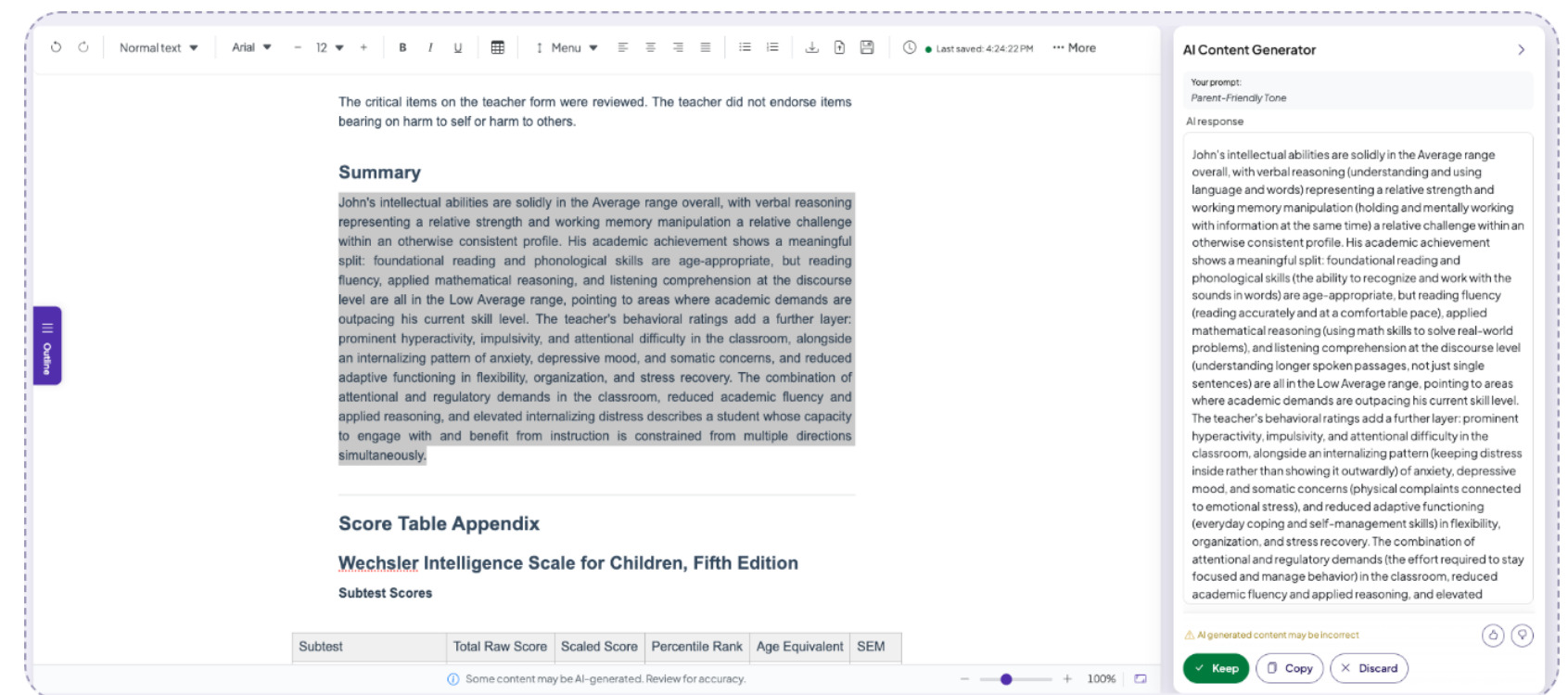
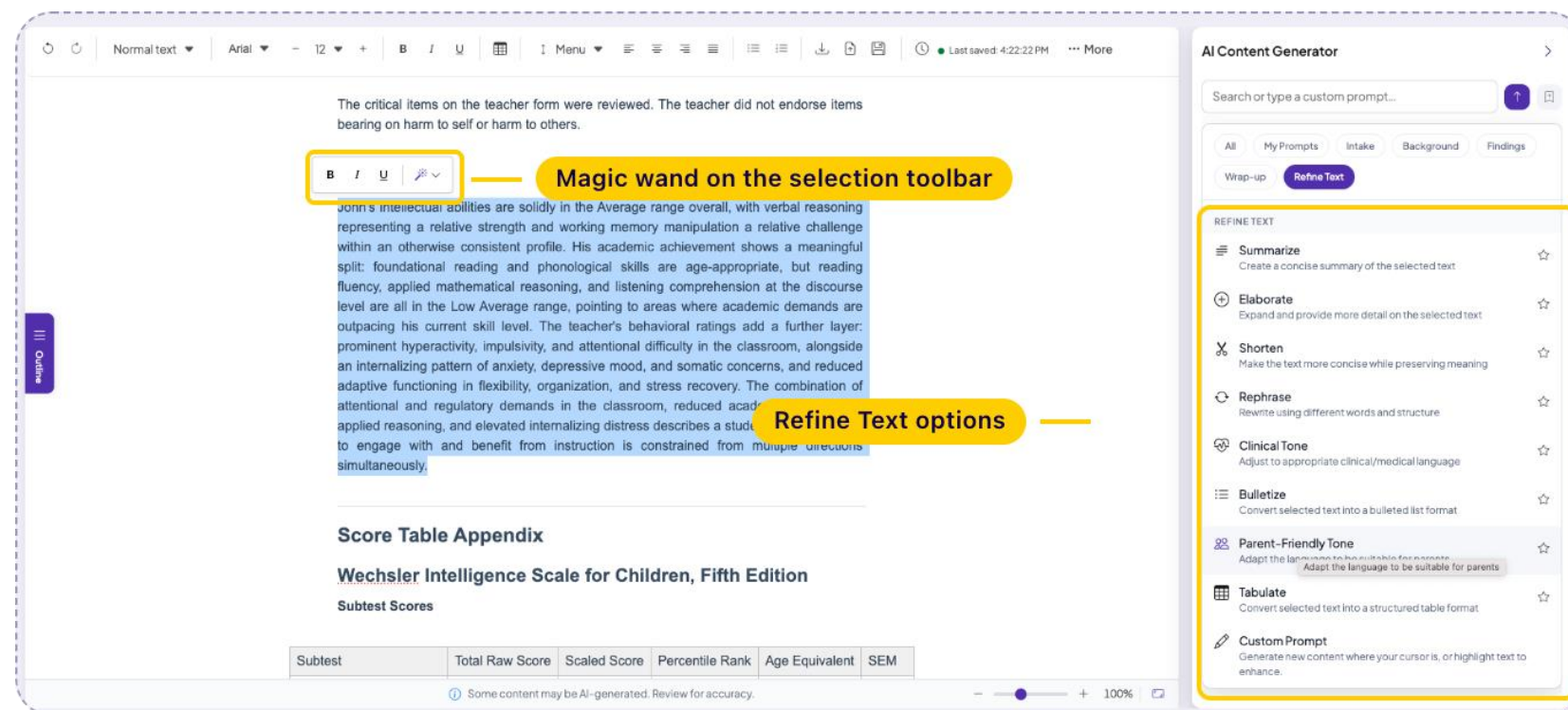


STEP 2



7 Refine text in the document

Select text, open the magic wand on the mini-toolbar, and pick a **Refine Text** option. Review the rewrite, then keep or discard it. You can also write a **Custom Prompt** to incorporate additional documentation or assessments.



Ideal for translating clinical language for family-facing sections, or restructuring dense paragraphs into recommendation lists.

8 Complete and review the report

1. Work through each section, replacing bracketed placeholders with practitioner-reviewed, client-specific content.
2. Review all AI-assisted content for **accuracy, appropriateness, and clinical validity**.
3. The report autosaves as a **Draft** under the client's Comprehensive Reports panel, so you can return to it across sessions.

The Co-Writing Assistant is a copilot. All clinical judgments, interpretations, and conclusions remain your responsibility as the signing practitioner.

BEFORE YOU SIGN IT

Six things you confirm, every report

- 1 Verify scores, classifications, names and dates.
- 2 Confirm interpretations are supported by the selected data.
- 3 Resolve or acknowledge conflicting information.
- 4 Remove unsupported statements.
- 5 Apply professional judgment to diagnoses, eligibility and recommendations.
- 6 Confirm the report meets your organizational and professional requirements.

9 Export the report, or copy the content

The screenshot displays the Co-Writing Assistant interface for a user named John Anderson. The main document is titled 'CONFIDENTIAL EVALUATION REPORT' and contains sections for 'IDENTIFYING INFORMATION' and 'REASON FOR REFERRAL'. The 'IDENTIFYING INFORMATION' section includes a table with fields like Name, Date of Birth, Age, Gender, Grade, Parent/Guardian, Date(s) of Evaluation, and Referral Source. The 'REASON FOR REFERRAL' section contains a paragraph about a psychoeducational evaluation for a student named John Smith.

An 'Export Content' button is highlighted in the top right corner of the document editor. A yellow callout box labeled 'Required attestation' points to a modal dialog box titled 'AI-Assisted Content Disclosure'. This dialog contains a warning about AI-generated content and two options: a checked checkbox for 'I confirm that I have reviewed this report in its entirety and take professional responsibility for its content. All clinical judgments and conclusions are my own.' and an unchecked checkbox for 'Add disclosure statement: Portions of this report were drafted using an AI-assisted writing tool aligned with HIPAA and FERPA privacy requirements. AI-generated materials may contain errors, omissions, or inaccuracies, and may not reflect current laws, regulations, or best practices. All clinical judgments, interpretations, conclusions, and recommendations were made by the evaluating clinician, who retains full responsibility for the content of this report.'

Below the dialog, an 'Export Report' button is visible, which opens a dropdown menu with the following options: 'Export as PDF', 'Export as DOCX', 'Export as HTML', and 'Export as TXT'. A yellow callout box labeled 'PDF, DOCX, HTML, or TXT' points to this menu.

On the right side of the interface, the 'AI Content Generator' panel is visible, showing a search bar and various prompts like 'Interpret by Test', 'Reason for Referral', 'Background Information', and 'Evaluation Procedures'. A 'Source Documents' section at the bottom lists several files, including 'BASC-3-Report.pdf', 'WIAT-4-Score-Report.pdf', 'WISC-V-Score-Report.pdf', and 'JohnAndersonReferral.docx'.

Required. Confirm you have reviewed the report in its entirety and take professional responsibility for its content.

Optional. Add the disclosure statement, then export as **PDF**, **DOCX**, **HTML**, or **TXT**.

Copying content instead

You do not have to export to get content out. Any AI response can be copied straight to your clipboard with Copy, so you can paste it into a report you are drafting elsewhere. This is the quickest route when the Co-Writing Assistant is supporting a document that lives in another system.

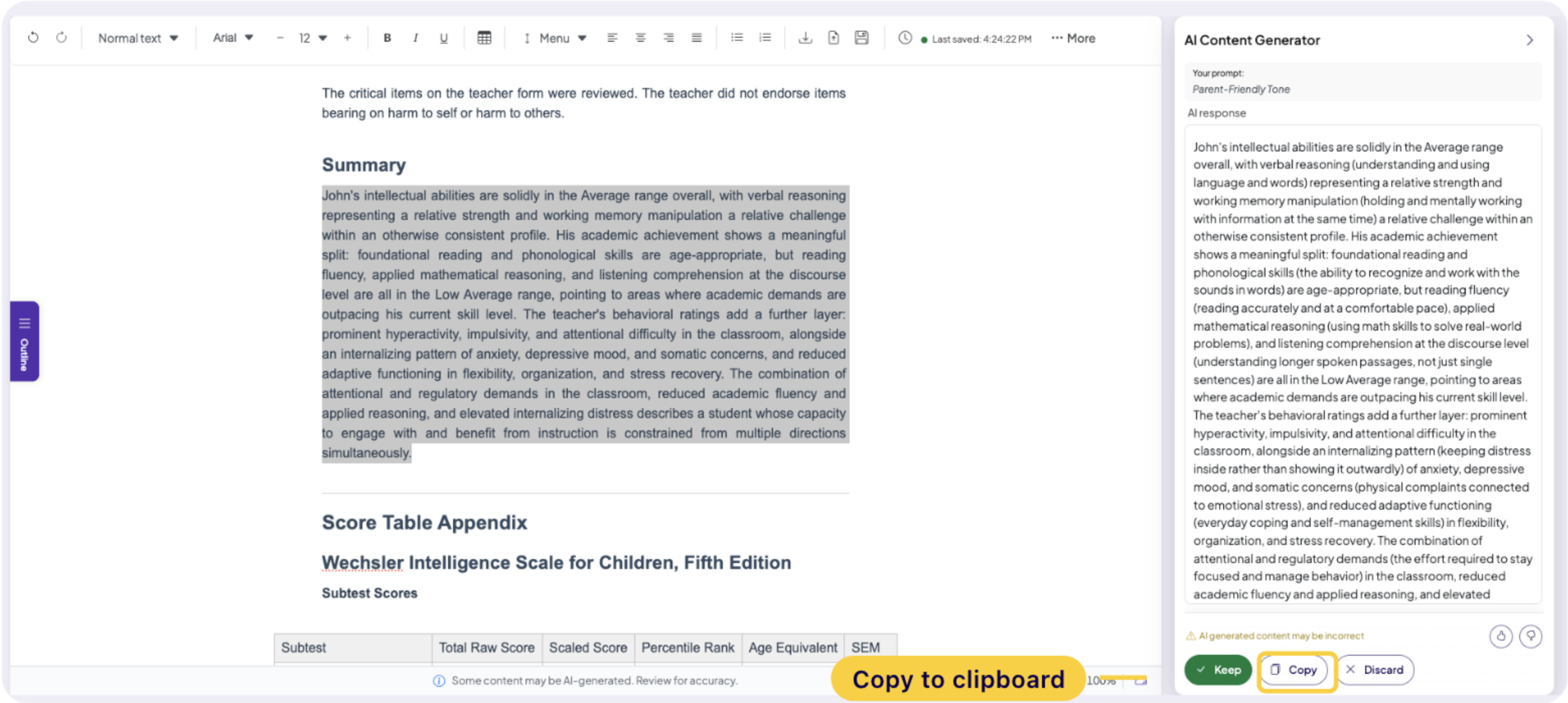
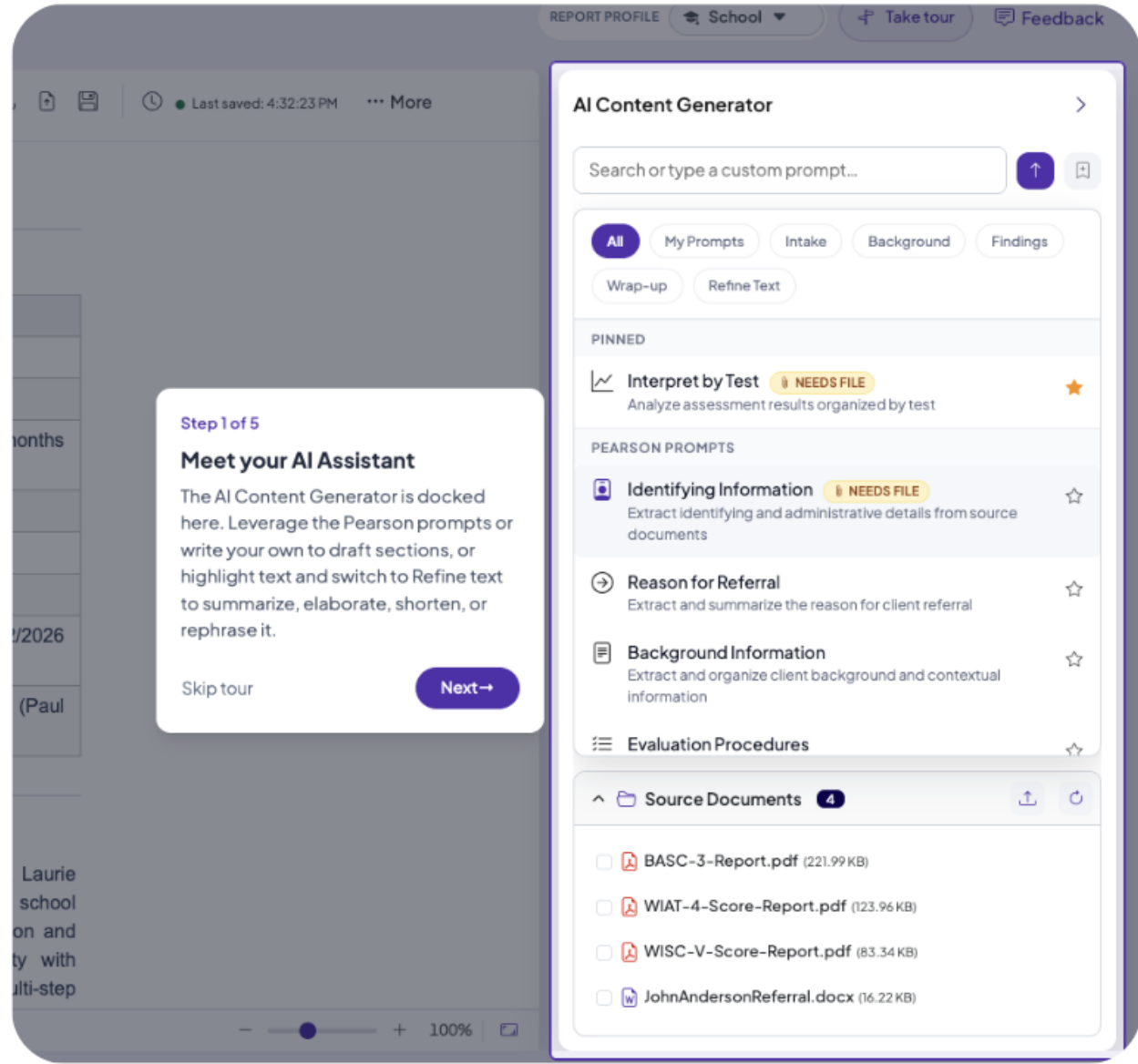
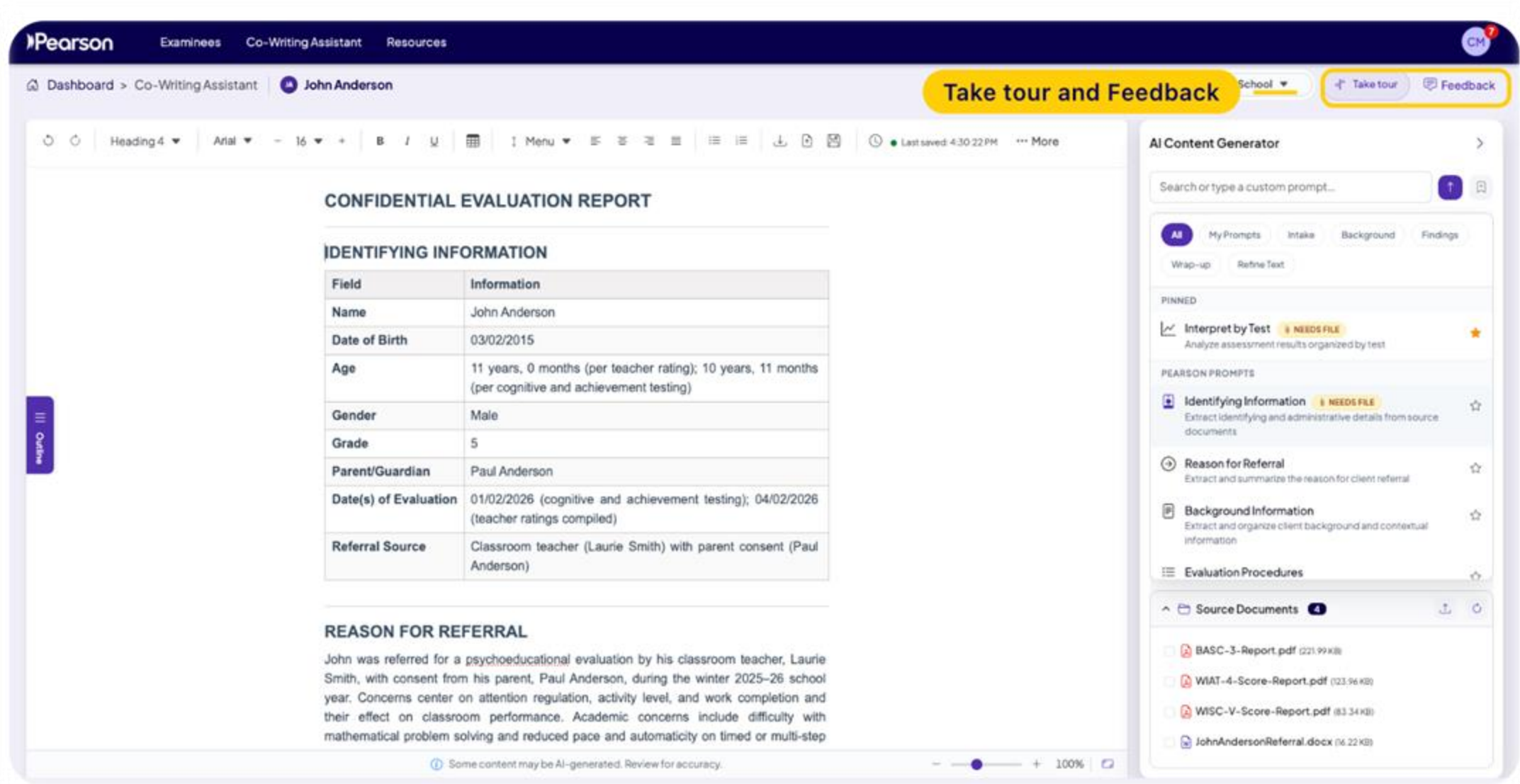


Figure 18. **Copy** sits beside Keep and Discard under every response, so content can go anywhere you write.

Take the tour, send feedback

Two buttons sit in the top bar throughout. **Take tour** walks you through the interface in five short steps, and **Feedback** goes straight to the product development team. Use feedback for the overall experience, something you wish existed, or something that isn't working the way you expect.

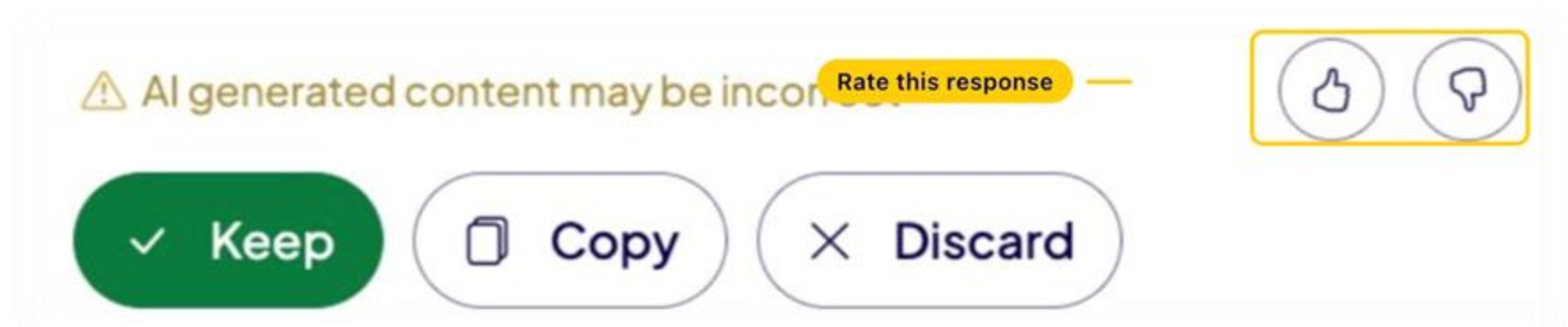


Response-level feedback

You can also give feedback on a single response, without leaving the editor.

The thumbs up and thumbs down buttons beside every AI response tell the product development team whether that specific draft was useful, which is the most direct way to shape how prompts perform in future releases. Use it when a particular result was especially good or clearly missed. It is helpful to include a quick description of what you were trying to accomplish.

Rating a response does not change or remove it, and you can still keep, copy, or discard it afterward.



Tips for effective use

Select sources deliberately

Prompts marked "NEEDS FILE" only use the documents you have checked.

Keep your own format

Upload your existing template and draft inside it. Nothing forces the AI structure.

Upload everything relevant

Observation notes, transcripts, and outside records make drafts far more specific.

Draft with AI, finish with judgment

Verify names, dates, scores, and classifications against the source reports.

Pin and save favorites

Star the prompts you use often and save your own under My Prompts.

Use Refine Text for audience fit

Parent-Friendly Tone prepares feedback-conference versions of technical findings fast.

Quick reference

Element	Where	What it does
+ New Report	Client profile	Generates a new comprehensive report canvas
Report Profile	Editor top bar	Sets setting and audience: School or Clinical
Outline tab	Editor left edge	Expands the report table of contents
Prompt bar	AI panel	Search Pearson prompts or type a custom prompt
NEEDS FILE badge	On prompts	Source documents must be selected first
Keep / Copy / Discard	Below AI responses	Insert, copy, or dismiss generated content
Magic wand	On text selection	Refine Text options for tone and formatting
Export Report	Editor top bar	PDF, DOCX, HTML, or TXT after attestation