Initial Referral, Evaluation, and Plan

- Initial referral
- Initial evaluation
- Initial Plan

Initial referral

Steps *To complete the initial referral in SameGoal:*

1. **Referral for Section 504 Evaluation**
   - Create document.
   - Share document as relevant:
     - If parent wishes to refer, share document with parent.
     - If educator with access to SameGoal wishes to refer, share document with educator.
   - Enter referral information.
   - Optionally attach supporting information.
   - If you are the referrer, enter your information under **Signatures**. If you are entering this information on behalf of another referrer, enter all information except their signature (leave blank).
   - Enter the information for school use (Person Receiving Referral), including **Date Received**.
   - Mark document complete.

Initial evaluation

Steps *To complete the initial evaluation documentation in SameGoal:*

1. **Section 504 Prior Written Notice**
   - Create document.
   - Enter information.
   - If the district **will not** evaluate the child:
     - Purpose should include to **Refuse** to **Initiate**:
       - Section 504 initial evaluation
       - Development of initial Section 504 plan *optional*
     - Mark document complete. No further documentation is needed.
   - If the district **will** evaluate the child, purpose should include to **Propose** to **Initiate**:
     - Section 504 initial evaluation
     - Development of initial Section 504 plan *optional*
   - Mark document complete.
   - Share document with parent(s).
2. **Consent for Section 504 Initial Evaluation**
   - Create document.
   - On the **Consent** tab:
     - Enter information.
     - 💡 Tip **Notice of Parent/Student Rights** referenced in this document is available from the print menu dropdown automatically as an **Additional View**.
   - Share the document with parent(s). Parent should indicate response on **Parent** tab.
   - If printed and shared with parent:
     - Document parent decision in SameGoal.
     - Optionally attach original.
   - Mark **Date received by campus** or **No parent response** in form bottom left.
   - Mark document complete.
   - If the parent does not consent to evaluation, no further documentation is needed.

3. **Section 504 Evaluation Parent Input** *(optional)*
   - Create document.
   - Share document with parent(s) for input.
   - If printed and shared with parent:
     - Enter/summarize parent input.
     - Optionally attach original input.
   - Mark document complete.

4. **Section 504 Evaluation Staff Input** *(optional)*
   - Create document.
   - Share document with educator (requires educator has SameGoal account).
   - If printed and shared with educator:
     - Enter/summarize educator input.
     - Optionally attach original input.
   - Mark document complete.

5. **Section 504 Evaluation**
   - Create document.
   - Share with other educators as relevant.
   - Enter information. Set **Evaluation Type** as **Initial evaluation**.
   - Sign electronically or attach signature page.
   - Mark document complete.

6. **Notice of Ineligibility for a Section 504 Plan** *(as relevant based on initial evaluation)*
   - Create document.
   - Enter information.
   - Mark complete.
   - Share with parent(s).
   - No further documentation needed, unless a meeting will be held to discuss (then use **Notice of 504 Team Meeting**).

7. **Notice of Eligibility for a Section 504 Plan** *(optional, as relevant based on initial evaluation)*
   - Create document.
   - Enter information.
   - Mark complete.
   - Share with parent(s).

Initial plan

To develop the initial plan in SameGoal:

1. **Notice of 504 Team Meeting**
   - Create document.
   - Enter information in **Notice** tab. **Purpose of Meeting** should include **Development of initial Section 504 plan (if appropriate)** if a 504 plan will be developed.
   - Share the document with parent(s).
   - If printed and shared with parent:
     - Document parent response in SameGoal.
     - Optionally attach original.

2. **Section 504 Plan**
   - Create document.
   - Share with other educators as relevant.
   - Enter information. Set **Meeting Type** as **Initial**.
   - Sign electronically or attach signature page.
   - Mark document complete.

3. **Consent to Provide Section 504 Services**
   - Create document.
   - Enter information.
   - Share the document with parent(s). Parent should indicate whether they consent to services or deny consent to services.
   - If printed and shared with parent:
     - Document parent decision in SameGoal.
     - Optionally attach original.
   - Mark **Date received by campus** or **No parent response** in the bottom left.
   - Mark document complete.
   - If the parent does not consent to services, no further documentation is needed.