samegoal

# Initial Referral, Evaluation, and Plan

- Initial referral
- Joint evaluation and plan
- Separate evaluation and 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).
    - Share the document with the person responsible for receiving the referral.
    - They will enter the information for school use including **Date Received**.
    - Mark document complete.

## Joint evaluation and plan

If you plan to conduct a single meeting to make an eligibility determination and develop the initial plan, you can follow this workflow.

**Steps** *To complete the initial evaluation and develop an initial plan 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
        - 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
    - Fill out the rest of the document and mark it 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. **Notice of 504 Team Meeting**
    - Create document.
    - Enter information in **Notice** tab. **Purpose of Meeting** should include both **Section 504 initial evaluation** and **Development of initial Section 504 plan (if appropriate)**.
    - Share the document with parent(s).
    - If printed and shared with parent:
        - Document parent response in SameGoal.
        - Optionally attach original.
    - Mark the document complete.
6. **Section 504 Evaluation**
    - Create document.
    - Share with other educators as relevant.
    - Enter information. Set **Evaluation Type** as **Initial evaluation**.
    - Work with the evaluation team to conduct the evaluation and make an eligibility determination.
    - Sign electronically or attach signature page.
    - Mark document complete.
7. **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**).

8. **Section 504 Plan**
    - Create document.
    - Share with other educators as relevant.
    - Enter information. Set **Meeting Type** as **Initial**.
    - Work with the Section 504 team to develop the plan.
    - Sign electronically or attach signature page.
    - Mark document complete.
9. **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.

## Separate evaluation and plan

If you plan to conduct separate meetings to make an eligibility determination and develop the initial plan, you can follow this workflow.

**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
        - 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
    - Fill out the rest of the document and mark it 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. **Notice of 504 Team Meeting**
    - Create document.
    - Enter information in **Notice** tab. **Purpose of Meeting** should include **Section 504 initial evaluation**.
    - Share the document with parent(s).
    - If printed and shared with parent:
        - Document parent response in SameGoal.
        - Optionally attach original.
    - Mark the document complete.
6. **Section 504 Evaluation**
    - Create document.
    - Share with other educators as relevant.
    - Enter information. Set **Evaluation Type** as **Initial evaluation**.
    - Work with the evaluation team to conduct the evaluation and make an eligibility determination.
    - Sign electronically or attach signature page.
    - Mark document complete.
7. **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**).

8. **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).

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**Steps** *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.
    - Mark the document complete.
2. **Section 504 Plan**
    - Create document.
    - Share with other educators as relevant.
    - Enter information. Set **Meeting Type** as **Initial**.
    - Work with the Section 504 team to develop the plan.
    - 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.