

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).
-

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.