

## 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.