

Initial Referral, Evaluation and Plan

Students with a disability who do not need special education may qualify for a Section 504 plan.

Referral

If a student has a physical or mental impairment that substantially limits one or more life activities, they can be referred to Section 504.

Steps *To refer a student to Section 504:*

1. Create a **Section 504: Referral**.
2. Check the suspected physical or mental impairment(s) and include any supporting information.
3. Provide information about which life activities or bodily functions are limited and what accommodations and modifications have already been made.
4. Whoever is initiating the referral should add their signature.
5. Share the document with whoever will be receiving the referral so they may sign the document. Transfer document ownership to them in order for future deadlines to be assigned to them.
6. Complete document. The student will be placed under eligibility review for Section 504.

Evaluation

In order to evaluate a student, first notify the parents, obtain their consent, and invite them to the evaluation meeting.

Steps *To notify the parents and obtain consent:*

1. **Section 504: Prior Written Notice**
 2. Select **Initial Section 504 Evaluation** as the type of action.
 3. Provide necessary information and contact information.
 4. Share the document with the parents and mark it complete.
 5. **Section 504: Parent Consent**
 6. Provide background and contact information.
 7. Share the document with the parents so they can grant or deny consent.
 8. Once the parents respond, complete the document.
 9. Be sure to include the **Notice of Parent/Student Rights** when sharing these documents.
 - The notice is included as an additional view for both documents.
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If the parents grant their consent, the child may be evaluated.

Steps *To invite the parents to the evaluation meeting:*

1. Create a **Section 504: Parent Invitation**.
2. Select the purpose **To determine if your child is eligible, or continues to be eligible under Section 504**.
3. Provide meeting information.
4. Share the document with the parents.
5. When the parents respond, mark the document complete.

Steps *To conduct an evaluation:*

1. Create a **Section 504 Evaluation**.
2. Select **Initial 504 Evaluation**.
3. Provide relevant dates.

4. Share the document with the evaluation team so each team member may conduct their evaluation.
5. Come together and provide a summary of findings in **Section 1**. Optionally, attach supporting documentation.
6. Make a determination about eligibility in **Section 2**.
7. All meeting participants and parents should review and add their signatures in **Section 3**.
8. Once everyone agrees on a decision, the document can be completed. If the student is eligible, they will be enrolled in the Section 504 program.

Plan

Before developing the plan, invite the parents.

Steps *To invite the parents to the plan meeting:*

1. Create a **Section 504: Parent Invitation**.
2. Select the purpose **To develop, review and/or revise your child's Section 504 plan**.
3. Provide meeting information.
4. Share the document with the parents.
5. When the parents respond, mark the document complete.

Steps *To develop an initial plan:*

1. Create a **Section 504: Plan**.
2. Select a meeting type of **Initial 504 Plan**.
3. Provide relevant dates.
 - Next evaluation should be 3 years minus 1 day after the previous evaluation.
 - End date should be 1 year minus 1 day after the start date.
 - Next review should be 1 year minus 1 day after the current plan.
4. In **Section 1**, describe the student's impairment(s).
5. In **Section 2**, summarize what accommodations, modifications, and interventions the student will receive.
6. In **Section 3**, provide state and districtwide testing information and indicate if the student will be tested with modifications.
7. Meet to discuss the plan, have all meeting participants and parents add their signatures, and have the parents grant or deny consent for the plan to be implemented.
8. Mark the document complete.
9. Share a copy of the plan along with a **Notice of Parent/Student Rights** with the parents.

Q Tip The plan cannot be amended. If a change needs to be made after the document is complete, copy the existing plan to a new document, switch the meeting type to **Review/Continuing 504 Plan**, and enter a new meeting date.

