

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
 - 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
- 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

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.

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.