



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: Clerical Support for Special Education and Section 504 Responsibilities

NUMBER: REF-5640.7

ISSUER: Anthony Aguilar, Chief of Special Education, Equity and Access
Division of Special Education

DATE: August 21, 2020

DUE DATE: **September 30 of each school year**

ROUTING

All Schools
Local District Superintendents
Local District Community of Schools Administrators
Local District Instructional Directors
Section 504 Designees
Special Education Administrators
LRE Specialists
School Site Administrators
Teachers
School Administrative Assistants
Clerical Staff Assigned to Special Education and Section 504 Duties

Principals will:

1. Log in to the Principal’s Portal;
2. Complete the “Clerical Support for Special Education and Section 504” section in the *School Designee Form*;
3. Reassign staff when staffing changes occur during the school year by updating the *School Designee Form* in the Principal’s Portal (The *School Designee Form* is available in the “Actions” section of the Principal’s Portal); and
4. Ensure the designated section of “Clerical Support for Special Education and Section 504” is completed in the *School Designee Form* no later than **September 30** of each school year.

PURPOSE: The purpose of this Reference Guide is to inform school administrators of the due date and procedures for identifying specific clerical staff assigned to support special education and Section 504 tasks as clarified below. The identification of this clerical staff does not release certificated staff from their responsibilities related to all aspects of special education and Section 504 compliance in their roles as administrators and teachers.

MAJOR CHANGES: This Reference Guide replaces REF-5640.6 dated September 3, 2019, of the same title, issued by the Division of Special Education. The due date has been changed to September 30 of each school year.

BACKGROUND: Since the 1997-1998 school year, the District has provided clerical support to schools to assist school administrators and teachers with special education compliance responsibilities. In 2003, this clerical support requirement was included in the Modified Consent Decree (MCD).

FUNDING: This position has been, and continues to be, norm based and funded by the general fund to perform special education and Section 504 tasks. There is no special education funding line associated with this position. The District’s commitment to ensure that special education procedures and all legal timelines are followed continues to be priority. As such, all schools are required to designate a clerical



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staff member to serve as the special education clerk. The special education clerk is to perform the duties outlined in the “Instructions” Section of this document.

INSTRUCTIONS: In compliance with the District’s plan to remain in substantial compliance, the District will ensure that schools continue to dedicate clerical support to meet special education and Section 504 compliance and operational tasks. (See Attachment A)

It is the responsibility of the school administrator to ensure that special education compliance activities are met within the clerical staffing allocations provided to each school. The staffing tables for elementary schools are outlined in BUL-5977.7 “Staffing Recommendations for Certificated and Clerical Personnel at Elementary Schools,” for middle schools in BUL-5978.7 “Staffing Recommendations for Certificated and Clerical Personnel at Middle Schools,” and for high schools in BUL-5979.7 “Staffing Recommendations for Certificated and Clerical Personnel in High Schools.”

School staff designated to provide clerical support for Special Education and Section 504 who do not currently have an active Welligent account should follow the directions below before attempting to access the Welligent Management System. Requests for access is dependent on the type of employee requesting:

- District employees are provided with Welligent access through the oneAccess
- Before requesting access, designated staff must have an active LAUSD Single Sign On (SSO) account.
- More information is available on the [Welligent Support](#) website.

SUBSTANTIAL COMPLIANCE MONITORING

For substantial compliance monitoring purposes, school site administrators, Local District supervising administrators, and all staff supporting students with disabilities should access the Supports for Substantial Compliance section of the District’s Special Education Electronic Policies and Procedures Manual (e-PPM). This ePPM webpage contains information regarding special education indicators including related policies, practices for success, and considerations for addressing issues of noncompliance.

GUIDES, BROCHURES, AND POSTERS:

Supplementary documents regarding special education are available in the Division of Special Education website in the *Employees* section and under the Quick Links section: Publications, Brochures, Flyers and Guides and Special Education Forms.

1. “Are You Puzzled by Your Child’s Special Needs?” brochure
2. “A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards)” booklet
3. “The IEP and You” guide
4. “The ITP and You” guide – secondary schools only
5. “The ITP and You Booklet”– secondary schools only



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6. "School and Family Support Services" poster
7. "School and Family Support Services" brochure
8. "Extended School Year (ESY)" brochure
9. "Least Restrictive Environment (LRE)" brochure

List of Supplementary Documents for Section 504:

1. "Section 504 and Students with Disabilities" brochure
2. "Student Enrollment Form"

RELATED RESOURCES:

- Division of Special Education Training: [*Clerical Duties to Support Programs for Students with Disabilities*](#)
- MyPLN Trainings: "Welligent Section 504 Self-Guided Lab", "Welligent Support Virtual Office Hours"
- Special Education Policies and Procedures Manual (*ePPM*), *Child Find and Search And Serve, Developing a Special Education Assessment Plan and Getting Ready for an Individualized Education Program (IEP) Meeting*
- [BUL-5977: "Staffing Recommendations for Certificated and Clerical Personnel at Elementary Schools"](#)
- [BUL-5978: "Staffing Recommendations for Certificated and Clerical Personnel at Middle Schools"](#)
- [BUL-5979: "Staffing Recommendations for Certificated and Clerical Personnel to High Schools"](#)
- [BUL-4692: "Section 504 of the Rehabilitation Act of 1973"](#)
- [REF-6241: "Mandatory Use of the Welligent Section 504 Program Module to conduct All Section 504 Activities"](#)
- [BUL-5526: "Procedures for Requesting Educationally Related Records of Students with or Suspected of Having Disabilities"](#)

ASSISTANCE:

For assistance or further information regarding:

- Norms to Allocate Clerical Personnel to Elementary, Middle and Senior High Schools, please contact Budget Services and Financial Planning at (213) 241-2100 or email at budget-info@lausd.net.
- Clerical Support for Special Education activities, please contact Lilia Moran, Compliance Coordinator, Division of Special Education at (213) 241-6701, or via email at lilia.moran@lausd.net
- Section 504, please contact Educational Equity Compliance, Office of the General Counsel at (213) 241-7682, or via email at equitycompliance@lausd.net
- Requests for Pupil Records, please contact the Custodian of Records, Special Education Service Center-Operations at (213) 241-6701, or via fax at (213) 241-5167. Mail to: Custodian of Records, Special Education Service Center-Operations, Beaudry Building, 18th Floor.
- Welligent Training Courses can be accessed in MyPLN at <https://achieve.lausd.net/mypln>

Clerical Support for Special Education and Section 504 Responsibilities

- Document all special education and Section 504 referrals in the Welligent Management System and track all legal timelines related to the development of special education assessment plans, assessments, IEP team meetings/Virtual IEP Team Meetings, annual and triennial IEP reviews;
- Inform appropriate school staff of referrals for special education assessment and provide an assessment plan or written response within 15 days of receipt of such requests to parents/requestors;
- Inform appropriate school staff of referrals for Section 504 evaluations and provide a written response to the request by sending a *Section 504 Request for Evaluation and Consent* form or *Denial of Request for Section 504 Evaluation* form within a reasonable period of time;
- Document and maintain a school calendar of IEP/Virtual IEP and Section 504 team meetings in the Welligent system;
- Create IEP and Section 504 meeting notification forms in the Welligent system and ensure that appropriate participants are notified of upcoming IEP/Virtual IEP and Section 504 team meetings;
- Remind all team members of scheduled meetings, including location/virtual location, date, and time, and document attempts to encourage parents to attend and participate in the IEP/Virtual IEP and Section 504 team meetings;
- Provide copies of the Welligent IEP, special education, and Section 504 plan documents to parents;
- Provide notification of the availability of the Welligent IEP to all school staff responsible for implementing the IEP, including related services staff;
- Provide notification of the availability of the Welligent Section 504 plan to all school staff responsible for implementation, Section 504 Designees, and Case Managers;
- Download correct forms, calculate and document that special education activities are completed within legal timelines (15 days to provide a special education assessment plan following receipt of written request and 60 days to convene an IEP/Virtual IEP team meeting following the District's receipt of a signed special education assessment plan);
- Contact parents and/or staff to ensure that preparatory activities are completed within timelines, and arrange for any requested reasonable accommodations such as an interpreter, as appropriate, for IEP/Virtual IEP and Section 504 team meetings;
- Maintain required special education documents in the special education green folders, Section 504 Plan documents in Welligent and designated Section 504 folder as part of student cumulative records;
- Verify that all IEPs and Section 504 Plans are in the Welligent system, including those from students who have recently enrolled from another SELPA;

IEP Documents

- Signed Assessment Plan
- Signed Parent IEP Notification
- Signed IEP Sign-In (Page 11)
- Signed IEP Consent Page (Page 10)
- Out of District IEP

Clerical Support for Special Education and Section 504 Responsibilities

Section 504 Plan Documents

- Parent Consent to Proceeding
- Teacher Feedback Forms
- Parent Feedback Form
- Signed Parent Consent
- Section 504 Plan
- Maintain logs of completed written translations of IEP and Section 504 related documents;
- Respond to requests for pupil records within 5 business days pursuant to California Education Code Section 49065 and 56504. Upon receipt of records request by parent of a student with or suspected of having a disability at a school site, school will route request as outlined in BUL-5526.6 and immediately forward to the Custodian of Records (see “Assistance” section for more information);
- Access the following Welligent reports to assist in the monitoring of IEP legal timelines and any other IEP Welligent reports, as appropriate:
 - IEP Master Calendar Report
 - IEP200
 - IEP Assessment Report
- Follow procedures identified in REF-6241.4 *Mandatory Use of the Welligent Section 504 Program Module to Conduct All Section 504 Activities* to access Section 504 management reports in the Welligent System;
- Notify the principal or designee when there is a technical problem related to the IEP or Section 504 process, such as obtaining appropriate forms, completed documents, or records;
- Maintain an adequate supply of updated special education and Section 504 pamphlets and brochures (see “List of Supplementary Special Education and Section 504 Documents” below); and
- Performing related duties as assigned.

List of Supplementary Special Education Documents

1. “Are You Puzzled by Your Child’s Special Needs?” brochure;
2. “A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards)” booklet;
3. “The IEP and You” guide;
4. “The ITP and You” guide – secondary schools only;
5. “The ITP and You” booklet – secondary schools only;
6. “School and Family Support Services” poster;
7. “School and Family Support Services” brochure;
8. “Extended School Year (ESY)” brochure; and
9. “Least Restrictive Environment (LRE)” brochure.

List of Supplementary Documents for Section 504

1. “Section 504 and Students with Disabilities” brochure; and
2. “Student Enrollment Form”.