



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: Mandatory Use of the Welligent Section 504 Program Module to Conduct All Section 504 Activities

NUMBER: REF-6241.4

ISSUER: David Holmquist, General Counsel
Office of the General Counsel

Julie Hall-Panameño, Director
Educational Equity Compliance Office

DATE: February 2, 2020

ROUTING
Local Districts
Administrators of Operations
Principals
Administrators
School Counselors
School Nurses
Section 504 Designees
Section 504 Case Managers
School Office Staff assigned to special education and Section 504 duties
Teachers

PURPOSE: The purpose of this reference guide is to inform all District personnel of the requirement to use the Welligent Management System’s Section 504 Program module for all Section 504 activities.

As of July 1, 2014, the Welligent Section 504 Program module replaced the Student Information System (SIS) database as the official source for maintaining, updating and managing Section 504 data. This reference guide outlines procedures and instructions for Section 504 Designees, Case Managers, and school office staff assigned to special education and Section 504 duties to follow when conducting Section 504 activities and updating all current students’ Section 504 details and documents in the Welligent System.

MAJOR CHANGES: This reference guide replaces REF-6241.3. Related resources and attachments have been revised as appropriate.

BACKGROUND: Section 504 of the Rehabilitation Act of 1973 (Section 504) is a civil rights law that prohibits discrimination/harassment on the basis of disability in any program or activity receiving federal financial assistance. The District has specific responsibilities related to the provision of a "free appropriate public education" (FAPE) to school-age individuals with disabilities under Section 504 and the Individuals with Disabilities Education Act (IDEA).

As a result of the Americans with Disabilities Act Amendments Act (ADAAA), there is a broader application of the definition of disability under the Americans with Disabilities Act (ADA) and Section 504. The new law eliminated the consideration of ameliorative effects of mitigating measures when determining whether a student has a disability, though they remain relevant when evaluating students' needs for accommodations/services. As a result, more students may be eligible for Section 504 nondiscrimination protections whether or not they currently need Section 504 plan accommodations/services.



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BACKGROUND (continued):

The Los Angeles Unified School District currently utilizes a web-based student data management system and record archive referred to as the Welligent Individualized Education Program (IEP) Management System to provide access to students' records under IDEA. The Welligent Management System continues to evolve in order to provide increased access to and maintenance of students' educational records, including, but not limited to, special education and Section 504 records.

The Welligent Section 504 Program module was developed to provide increased access to students' Section 504 records and is the District's official source for maintaining, updating, monitoring, and managing Section 504 data and records. Section 504 forms are required to be developed and saved within the Welligent system. School personnel are required to use the Welligent Section 504 Program module when conducting Section 504 activities regarding referral, evaluation, plan development, and follow up, in order to more effectively serve monitor, and track students with disabilities under Section 504. The Welligent Section 504 Program module presents the Section 504 process as a sequence of four phases: I. Management; II. Evaluation; III. Meeting; and IV. Follow Up.

PROCEDURES:

- I. LAUSD Section 504 Designees, Case Managers, and designated school office staff who do not currently have an active Welligent account should complete the following steps before attempting to access the Welligent Management System Section 504 Program module:
 - A. Activate their account by visiting the [Welligent Support Unit](#).
 - B. Review *Welligent Support Technical Guide* (Attachment A) regarding minimum requirements for Windows and Macintosh operating systems to improve user functionality.
 - ***Internet Explorer*** is the required browser for PC users when accessing the Welligent Section 504 Program Module;
 - Safari is required for Macintosh users; however, use of a Macintosh may limit functionality; and
 - *Firefox, Chrome and Windows Edge* are not compatible browsers; therefore, a loss of functionality would result.
- II. Section 504 Designees, Case Managers, and designated school office staff should identify students currently eligible under Section 504 at their school by following instructions outlined in the *Welligent Section 504 Program Module Quick Sheet* (Attachment B: #12) to generate a *Welligent Section 504 Report*. Review the report for accuracy and update the information in the Welligent Section 504 Program module "Section 504 Details" as necessary.
 - A. Locate the most current Section 504 Plan for each student.



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PROCEDURES (continued):

1. All current Section 504 documents with signatures and supplemental pages should be scanned and uploaded as an attachment to the student's Welligent Section 504 record immediately upon completion of the Section 504 evaluation.
 2. If the Section 504 Plan cannot be located in the student's cumulative record folder or Welligent, follow procedures in the most current *BUL-4692 Section 504 of the Rehabilitation Act of 1973*, to conduct a Section 504 re-evaluation using the Welligent Section 504 Program module as outlined in Section III of this reference guide.
- B. Conduct a student record search in Welligent to determine if a Section 504 record has been previously created by following instructions outlined in the *Welligent Section 504 Program Module Quick Sheet* (Attachment B).
1. If a record has been created, review Section 504 Details and update if necessary.
 - a. Review Welligent Section 504 documents to determine if they are complete and delete any duplication (Attachment B: #9).
 - b. If no documents can be located, check to see if the records were previously scanned and attached (Attachment B: #7).
 2. If there is no Section 504 student record in the Welligent Section 504 Program module for a student who has a Section 504 plan in the cumulative record, proceed to step C below.
- C. Create a Section 504 record in the Welligent Section 504 Program module for each student following the procedures outlined in the *Welligent Section 504 Program Module Quick Sheet* (Attachment B).
1. Update/enter Section 504 details (Attachment B: #5).
 2. Scan and/or attach relevant Section 504 plan documents to the student record (Attachment B: #7).
- III. All documents for future Section 504 initial evaluations, re-evaluations, and manifestation determinations shall be developed and saved within the Welligent Section 504 Program module following the instructions outlined in the *Welligent Section 504 Program Module Quick Sheet* (Attachment B: #3-7).
- IV. Upon accessing the Welligent Management System, follow instructions



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PROCEDURES (continued):

outlined in Attachment B when conducting the following activities as necessary:

1. Locating a Student Record/Student Record Search
 2. Locating the Section 504 Student Record
 3. Creating the Section 504 Record for the First Time
 4. Editing the Section 504 Student Record
 5. Updating Section 504 Details and Creating Forms
 6. Creating Forms for a Re-Evaluation
 7. Attaching Relevant Section 504 Documents to the Student Record
 8. Receiving System Alerts
 9. Deleting a Section 504 Form
 10. Locking a Section 504 Form
 11. Generating a Section 504 Report
- V. Welligent Section 504 Program module users may access the following training on [MyPLN](#):
- A. *“Welligent Section 504 Self-Guided Lab”*
Online training in a computer lab format with step-by-step instructions on generating Section 504 reports, creating records, and updating Section 504 details in the Welligent Section 504 Program Module.
 - B. *“Special Education and Section 504 MCD Clerk Training”*
Outlines procedures, specific roles, and responsibilities of clerical staff assigned special education and Section 504 tasks.
 - C. *“Section 504 Procedures”* Outlines the four phases of the Section 504 process.

RELATED RESOURCES:

[*BUL-4692 Section 504 of the Rehabilitation Act of 1973*](#), issued by the Office of the General Counsel

[*REF-5640 Clerical Support for Special Education and Section 504 as Required by the Modified Consent Decree*](#), issued by the Division of Special Education



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ASSISTANCE: For further information, contact the following District Offices:

Educational Equity Compliance Office (EECO): (213) 241-7682

Visit the EECO website for related information: <http://achieve.lausd.net/eeco>

Welligent Support: (213) 241-5200

District Nursing Services: (213) 202-7580

Your Local District Operations/Section 504 Designee

Information Technology (ITD) Help Desk (213) 241-5200

<https://lausd-myit.onbmc.com>

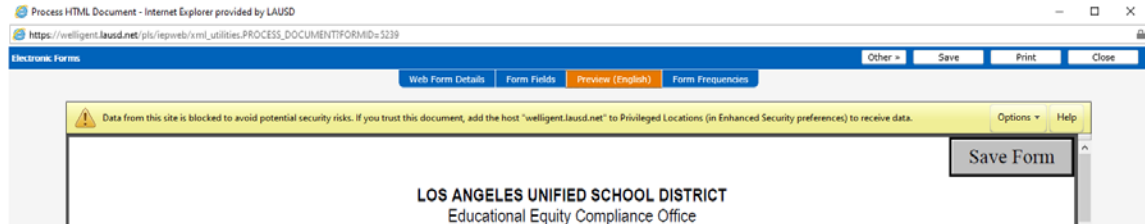
ATTACHMENTS: Attachment A - *Welligent Support Technical Guide*
Attachment B - *Welligent Section 504 Program Module Quick Sheet*

Opening a PDF form in Welligent

When opening a PDF form, ensure the top section of the form displays a green bar and states “The file includes fillable form fields.....”.



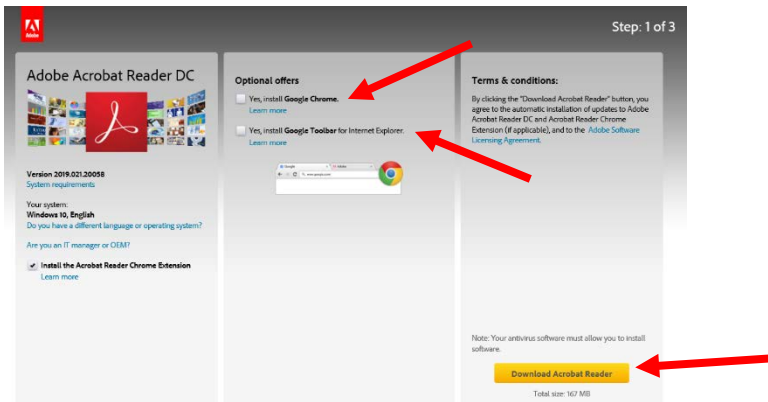
If the form displays a yellow bar at the top, click on **Options** and select “**Add Host To Privileged Locations**”. This will change the yellow bar to green and allow the student data to pre---populate.



If PDF forms do not pre---populate with student information, follow the steps provided below to adjust your Adobe Reader settings.

Install the latest version of Adobe Reader

1. Open Internet Explorer
2. In the address bar type “<https://get.adobe.com/reader/>” and press enter.

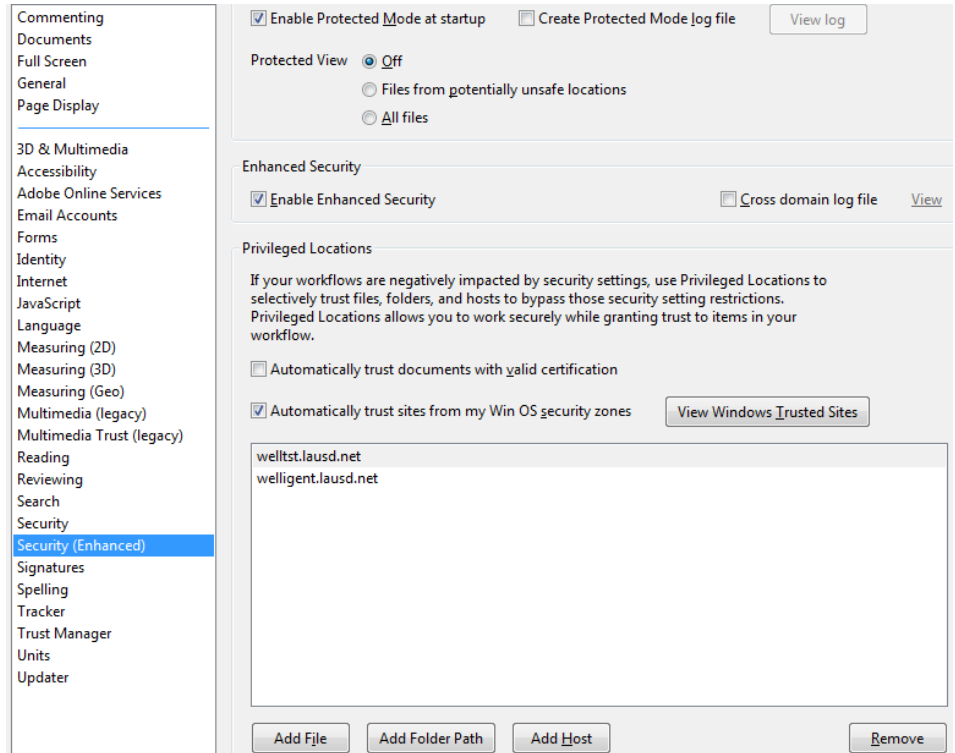


3. Uncheck any Optional Offers and click **Download Acrobat Reader**.
4. Click **Run**
5. Click **Next**
6. Once finished click **Finish**

Adobe Reader Settings for Internet Explorer users

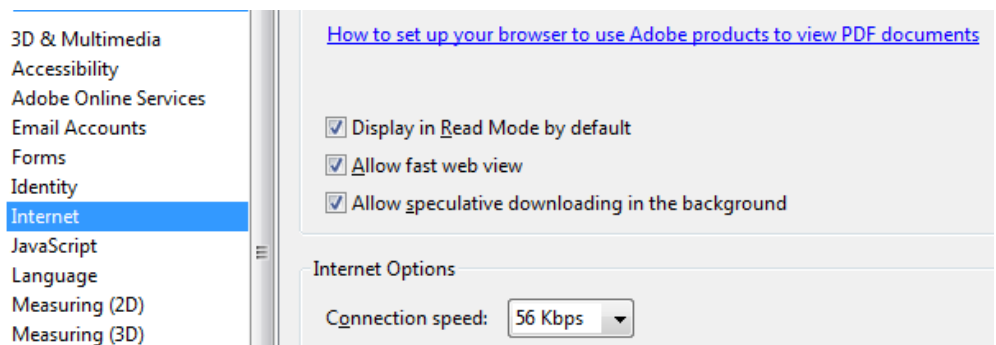
“Add Host To Privileged Locations” can be verified in Adobe Reader.

1. Open Adobe Reader
2. Click **Edit**
3. Click **Preferences**
4. Click **Security (Enhanced)**
5. Ensure **welligent.lausd.net** is listed as one of the Trusted Sites.



Internet Explorer settings can be verified in Adobe Reader.

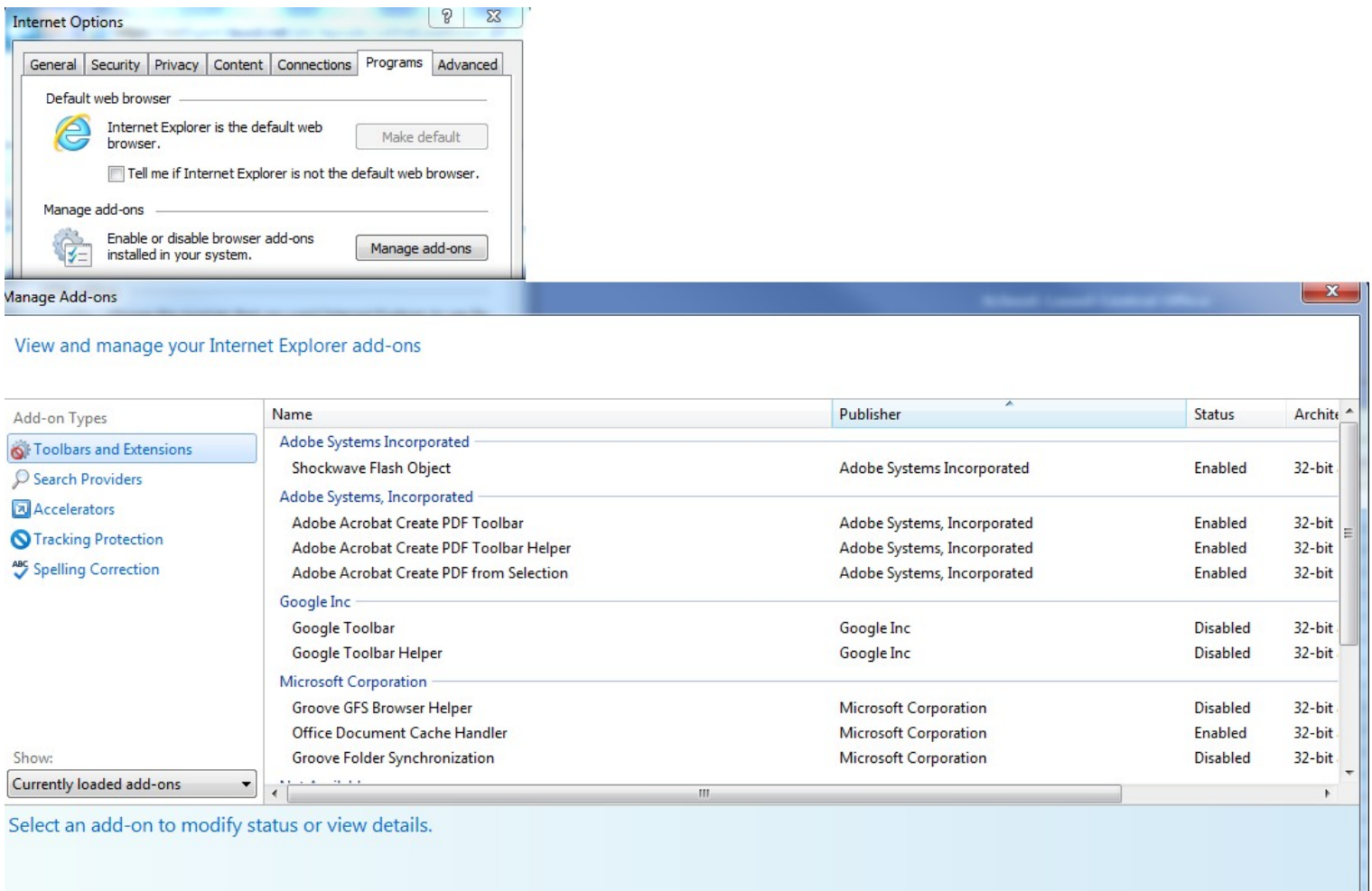
1. Open Adobe Reader
2. Click **Edit**
3. Click **Preferences**
4. Click **Internet**
5. Ensure all three checkboxes are checked.



Enable Adobe PDF Plug

Enable Plugins

1. Open Internet Explorer
2. Click **Tools**
3. Click **Internet Options**
4. Click **Programs**
5. Click **Manage Add---Ons**
6. Click **Toolbars and Extensions** and enable all Adobe application add---ons



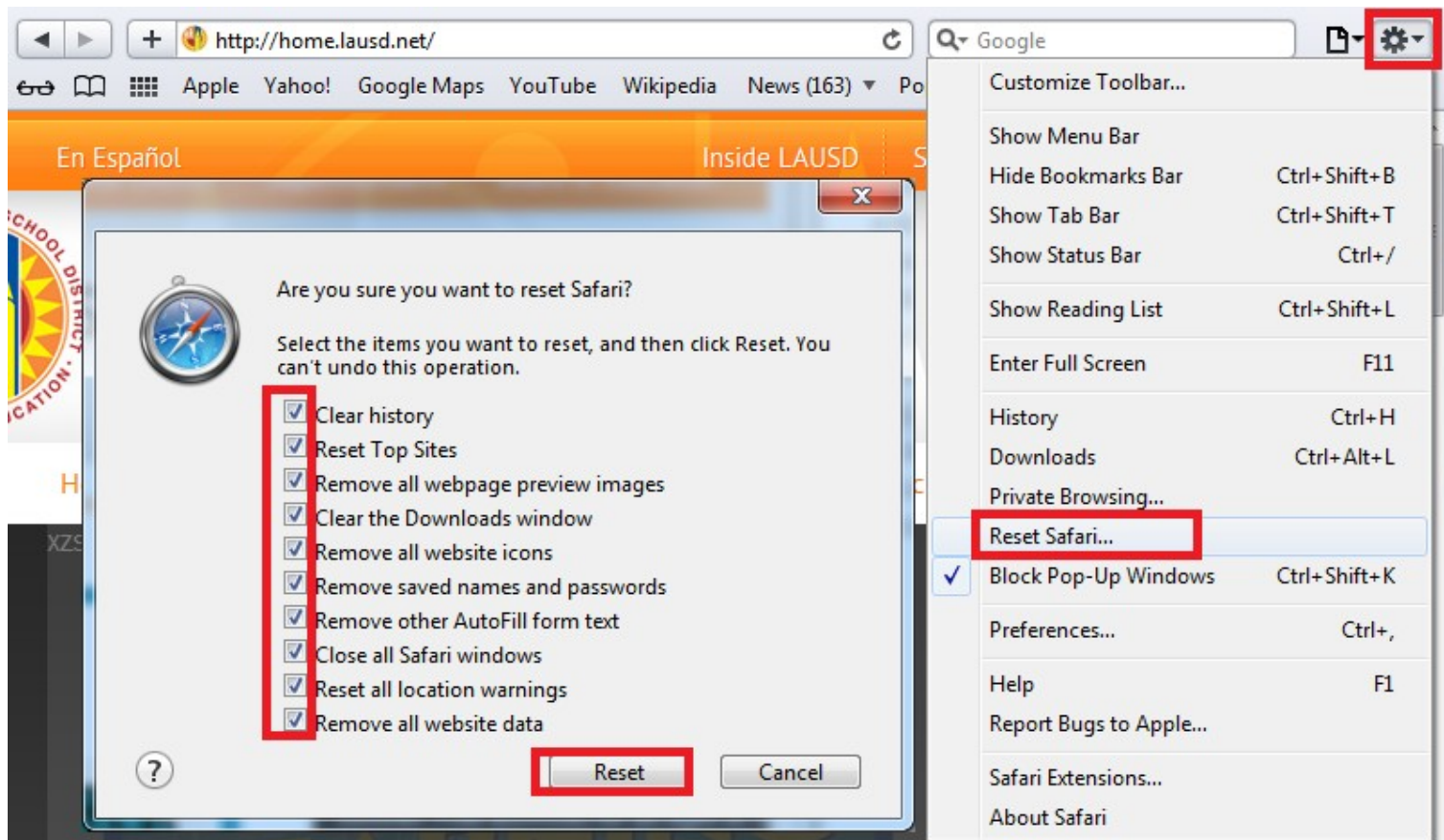
For Safari users (version 7 and below), Reset Safari Settings

MAC:

1. Open Safari
2. Click **Safari**
3. Click **Reset Safari**
4. **Check all checkboxes** then click **Reset**

Windows:

1. Open Safari
2. Click **Safari Settings**
3. Click **Reset Safari**
4. **Check all checkboxes** then click **Reset**

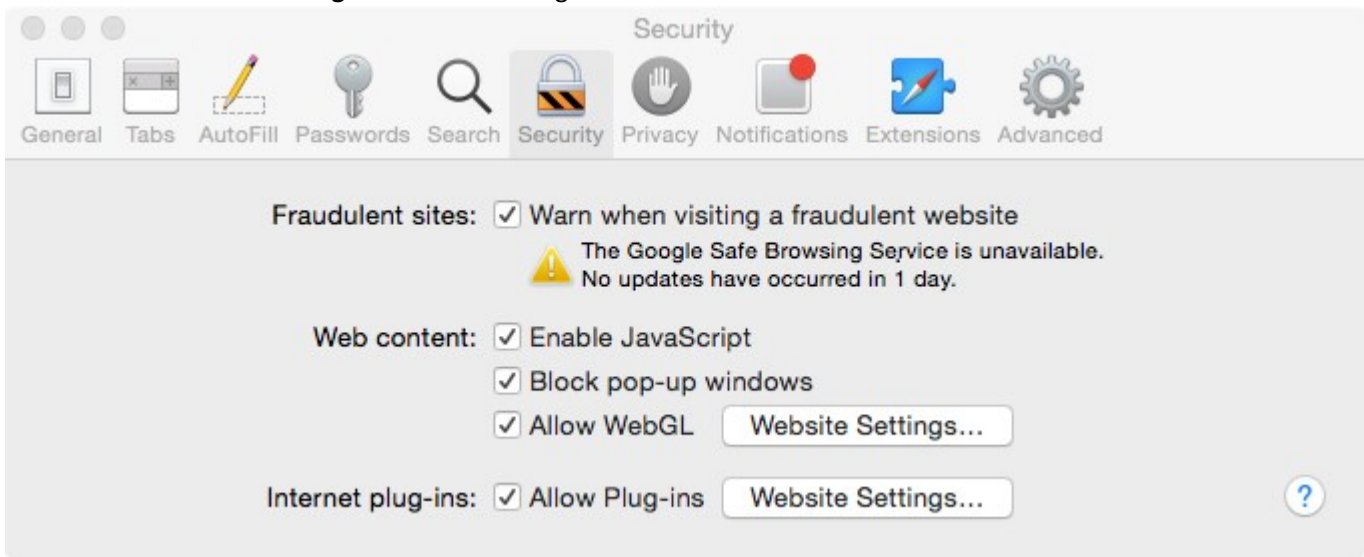


Welligent Technical Requirements: PDF Forms

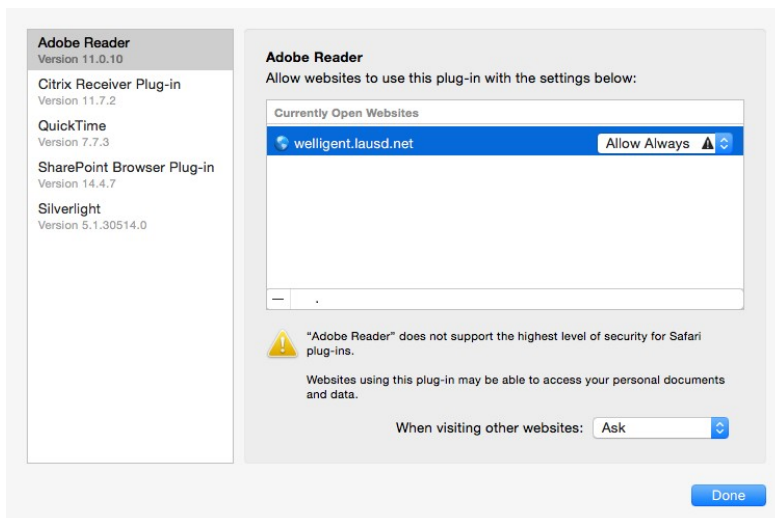
For Safari users (version 8 and above), adjust Safari Settings

MAC:

1. Open Safari
2. Click **Safari Settings**
3. Click **Preferences**
4. Click **Security**
5. **Check the box** next to Allow Plug---Ins
6. Click **Website Settings** next to Allow Plug---Ins




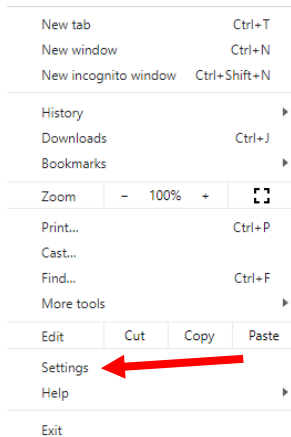
7. Click **Adobe Reader**
8. Select Welligent url (**welligent.lausd.net**)
9. Select **Allow Always**



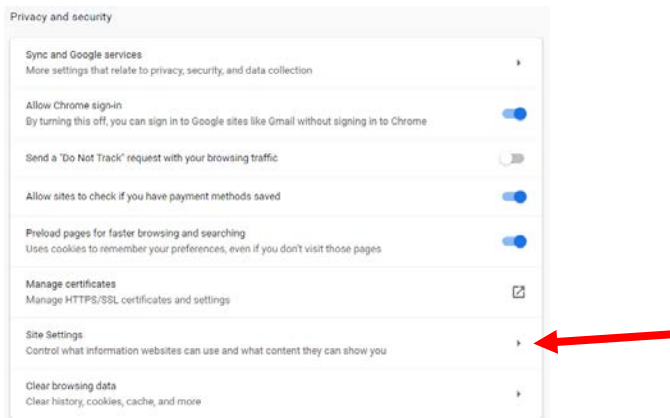
For Chrome Users

Opening PDF's in Chrome

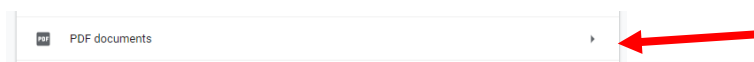
1. Start Chrome
2. At the top right, click on the ellipsis button 
3. Click on the Settings options



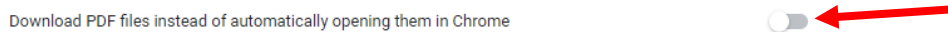
4. Go to the bottom of the screen and click on Advanced
5. Under "Privacy and Security" section, click on the Site settings



6. Click on "PDF documents"



7. Turn off Download PDF files instead of automatically opening them in Chrome.



8. Toggle switch to the on  to the off  position

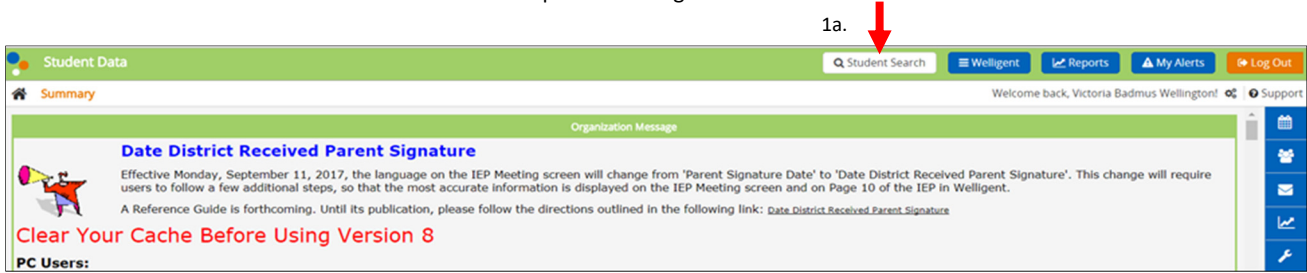
Welligent Section 504 Program Module Quick Sheet

Attachment B

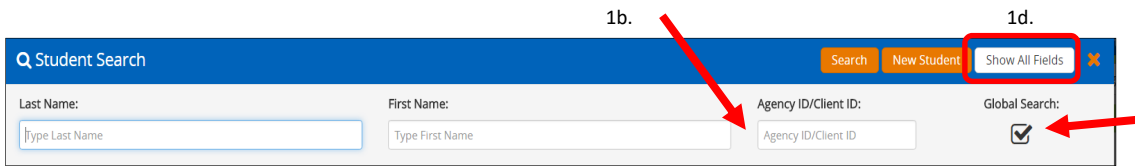
I. FREQUENTLY USED FEATURES

1. LOCATING A STUDENT RECORD/STUDENT RECORD SEARCH

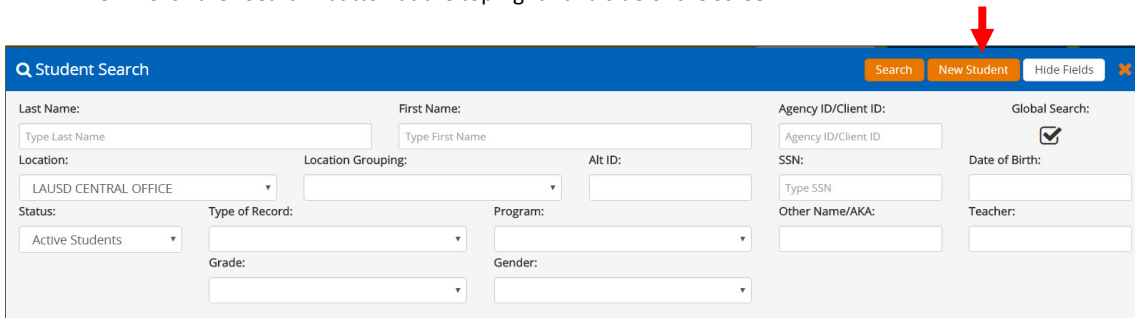
- a. Select the "Student Search" tab at the top of the Welligent screen



- b. Enter Student* ID # in the "Agency ID/Client ID" field
- If Student ID is unknown, enter
 1. "Last Name"
 2. "First Name"
- c. Check the Global Search box.
- d. Click "Show All Fields" if you need to enter more information such as
1. Date of Birth in the "DOB" field
 2. School of attendance in "Location" field



- e. Click the "Search" button at the top right hand side of the screen



Welligent Section 504 Program Module Quick Sheet

Attachment B

*Based on the student information entered, one of the two following screens should appear:

If Student ID number is entered, select "Program History":

The screenshot shows the 'Student Data' interface for a student named 'Sample, Sample'. The 'Record Navigator' on the left side has 'Program History' highlighted with a red box. Other visible elements include 'Reminders', 'Schedule for Sep 14, 2017', and various navigation icons on the right.

If the student's name is entered, locate the student record below and select "Edit":

The screenshot shows the 'Student Search' interface. A search filter is set to 'LAUSD CENTRAL OFFICE'. Below the search filters is a table of student records. A red arrow points to the 'Edit' icon (orange cog wheel) for the student with ID 'LOS FELIZ1'.

Edit	Info	Alert	Student	DOB	ID	Grade	Location	Status
			Sample, Sample L	02-May-2010	W177798	04th	Private School Office (1536)	Active
			Sample, Sample	07-Sep-2003	SAMPLE123	07th	Lausd Central Office	Active
			Sample, Sample	01-Aug-2005	LOS FELIZ1	09th	Lausd Central Office	Inactive
			Sample, Sample	23-Jan-2008	HAMASAKI 1	04th	Lausd Central Office	Active
			Sample, Sample	04-Aug-2004	LAUSD 12	06th	Lausd Central Office	Active

2. LOCATING THE SECTION 504 STUDENT RECORD

- Hover mouse over the orange cog wheel on the left
- Select "Program History" in the Record Navigator

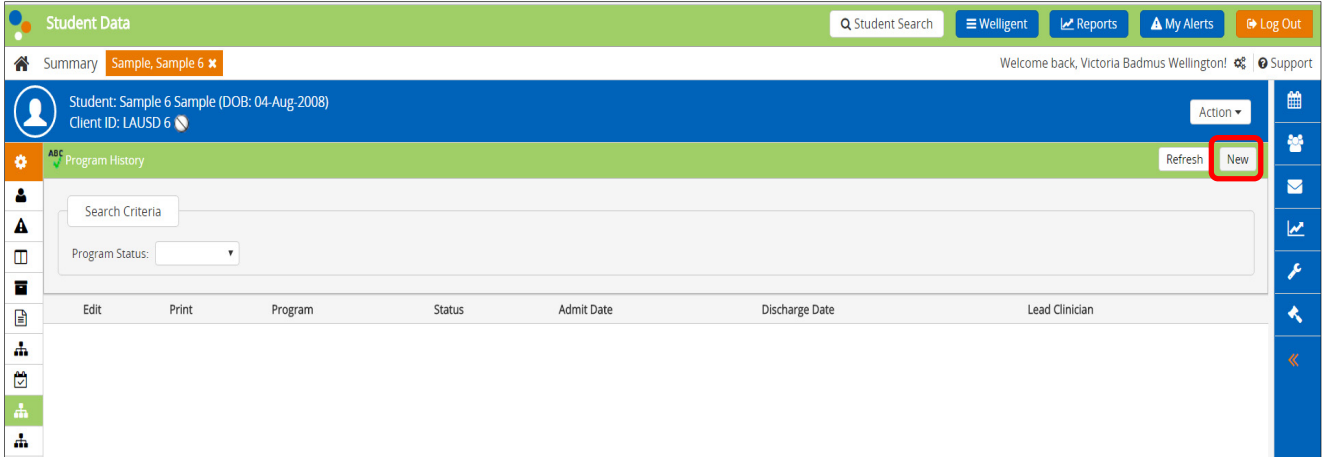
This screenshot is similar to the first one, but the 'Program History' option in the 'Record Navigator' is now selected and highlighted in green.

Welligent Section 504 Program Module Quick Sheet

Attachment B

3. CREATING THE SECTION 504 STUDENT RECORD FOR THE FIRST TIME

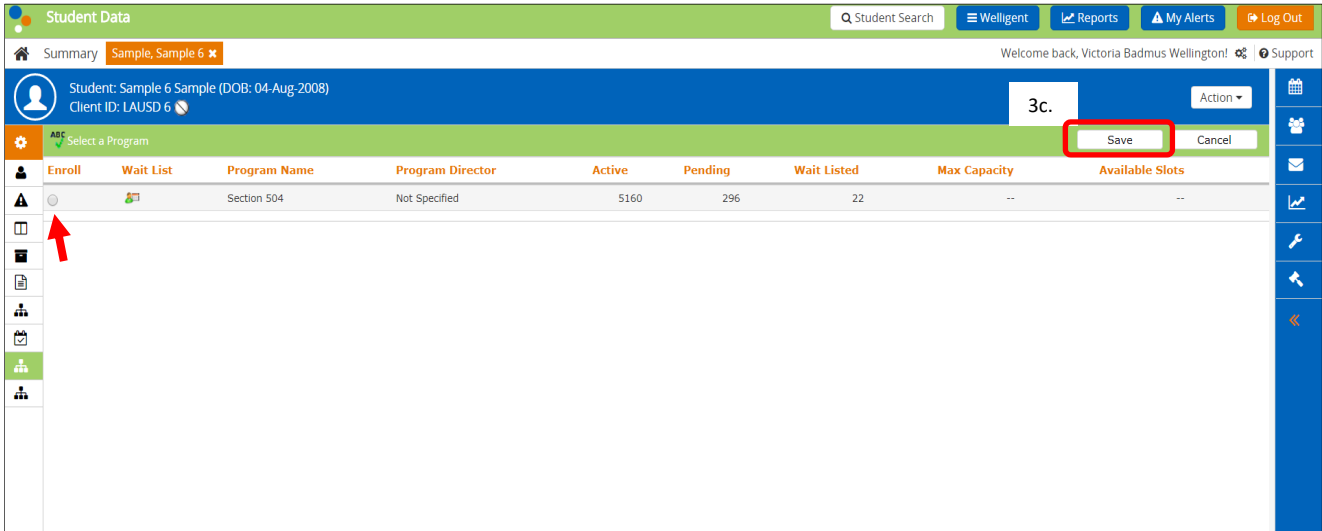
a. Click "New"



b. Select "Enroll"

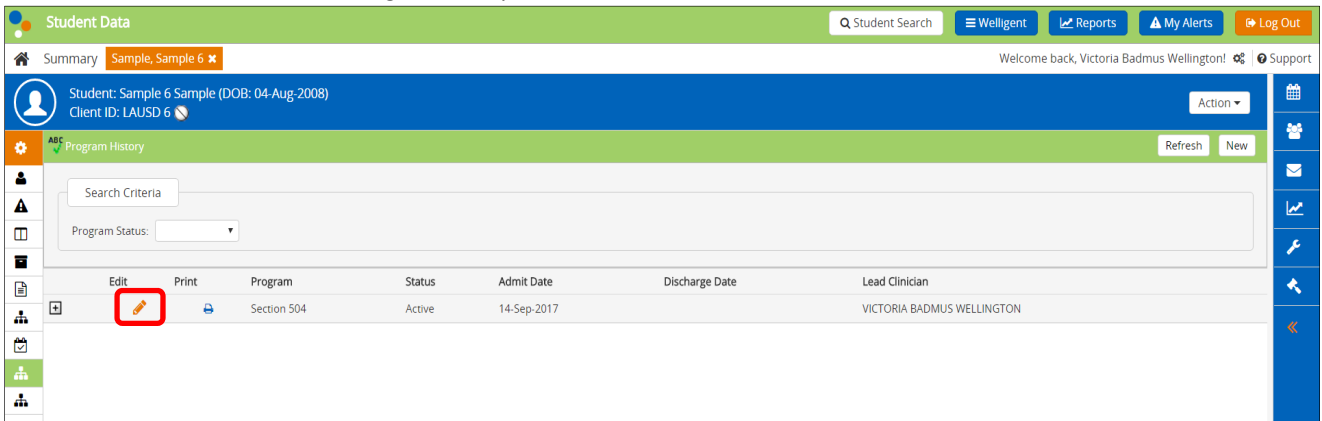
c. Click "Save"

3b.



4. EDITING THE SECTION 504 STUDENT RECORD

a. Select "Edit" under "Program History"



Welligent Section 504 Program Module Quick Sheet

Attachment B

5. UPDATING SECTION 504 DETAILS and CREATING FORMS

- a. Enter information in "Section 504 Details" and/or "Section 504 Exit Details" for each phase of the process as appropriate
- b. Click the "Save" button to save updated Section 504 Details and/or Section 504 Exit Details
- c. To create a new Section 504 form, click the green plus sign for Phase I, II, III, or IV as appropriate and the documents required for that phase

5a.

5c.

5b.

Welligent Section 504 Program Module Quick Sheet

Attachment B

- d. Upon opening the form, some student information will pre-populate into the fields; however; if student no information pre-populates, it is a warning that the information you type will not save so your computer settings may need to be adjusted according to Welligent Technical Requirements (Attachment A)
- e. Enter the information on the form as appropriate
- f. To save the document, select "Save Form."

5f. **Save Form**

LOS ANGELES UNIFIED SCHOOL DISTRICT
Educational Equity Compliance Office

REQUEST FOR SECTION 504 EVALUATION and CONSENT
Pursuant to Section 504 of the Rehabilitation Act of 1973, the District has a duty to identify, refer, evaluate, and if eligible provide a free appropriate public education to disabled students. For additional information regarding Section 504, please contact your School's Section 504 Designee: _____ at (Ph) _____ or you may call the District's Educational Equity Compliance Office at (213) 241-7682.

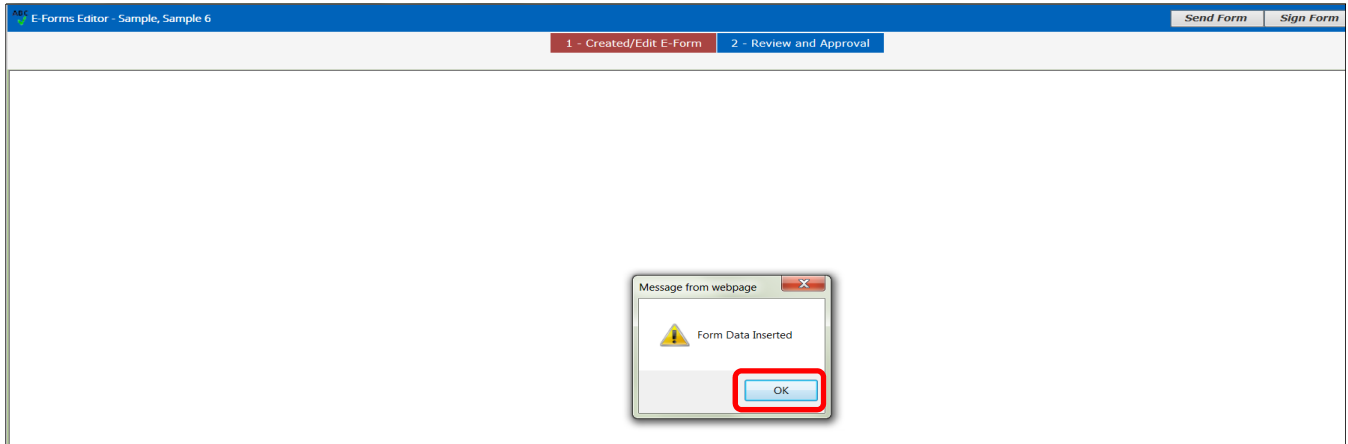
5d. Student ID: **LAUSD 6** Date: _____

Last Name	Sample	First Name	Sample 6	Grade	
School	LAUSD CENTRAL OFFICE	Educational Service Center	LAUSD Admin		
Student's Primary Language		English Language Development Level			

5e. Parent(s)/Guardian(s)
Home Address _____
Home Phone _____ Cell Phone _____ Work Phone _____

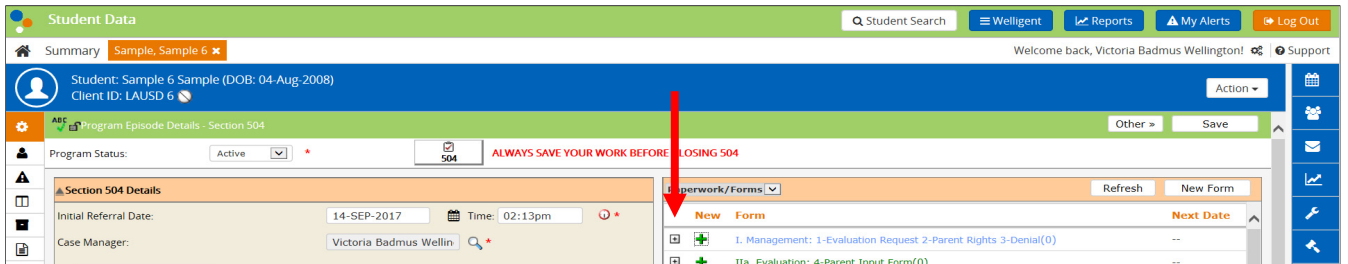
What is the reason for the request? (Clarify Student's needs and area(s) of concern)

- g. Upon the data being saved, the following confirmation message will appear



6. CREATING FORMS FOR A RE-EVALUATION

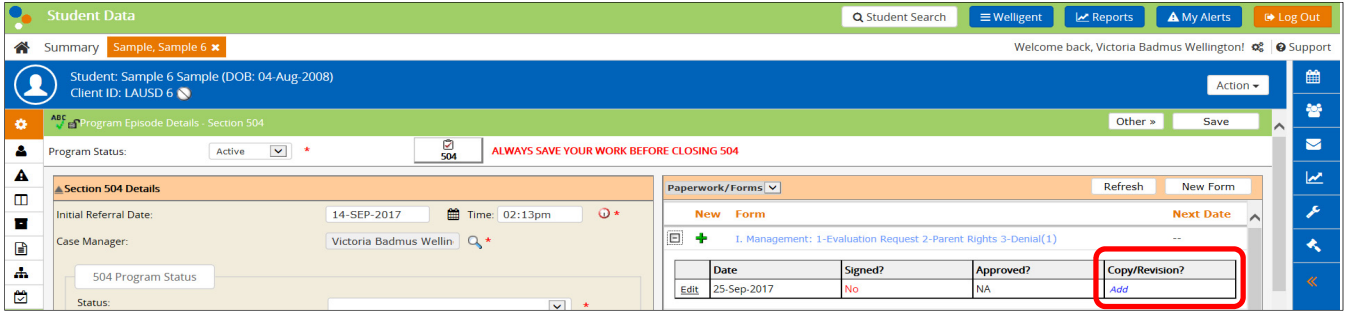
- a. Click the black plus sign to the left of the green plus sign for the relevant re-evaluation phase



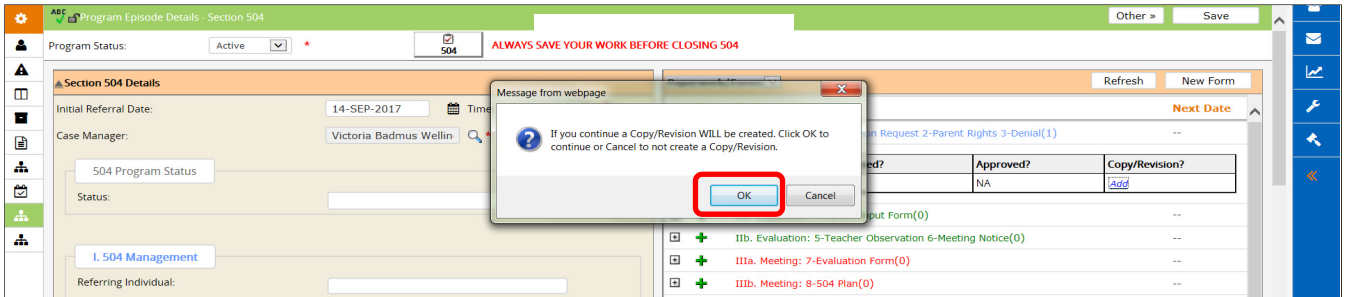
Welligent Section 504 Program Module Quick Sheet

Attachment B

b. Select "Add" to create a revised form for the re-evaluation



c. Click "OK" when the following message appears

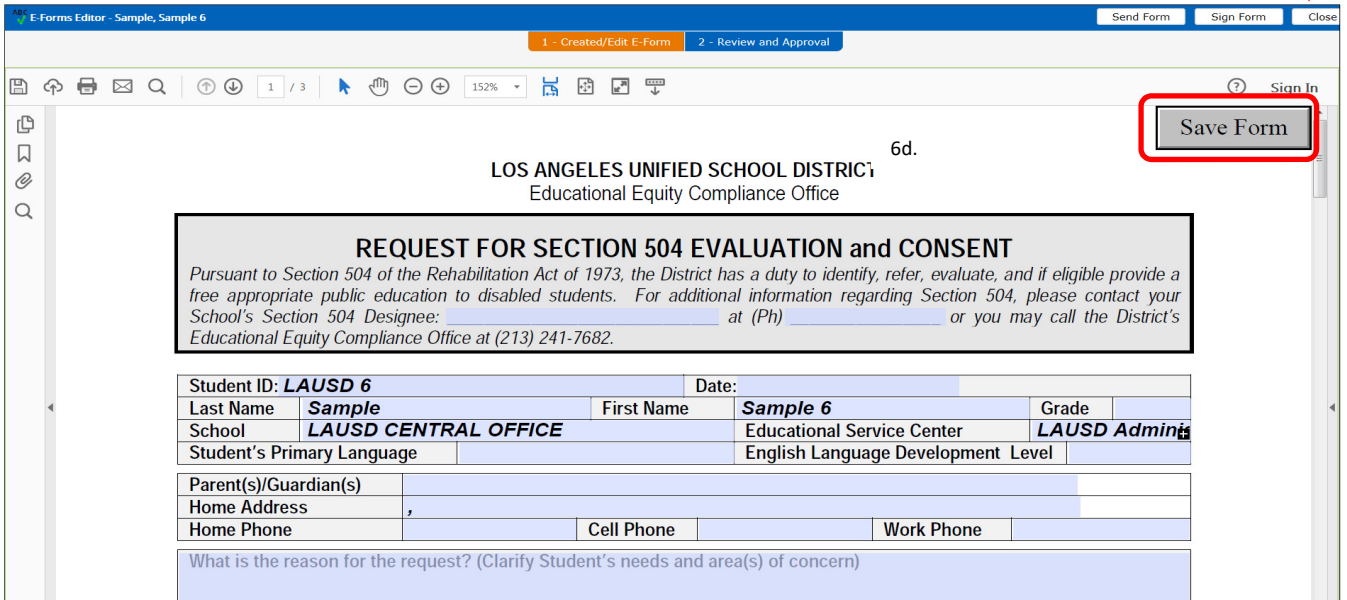


d. Type the updated information on the form and click "Save Form"

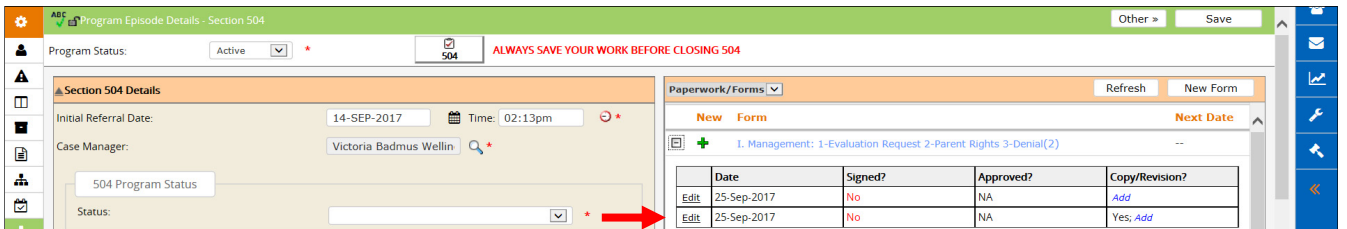
e. Click "OK" when the confirmation message appears

f. Click "Close"

6f. ↓



g. The revised form for the re-evaluation will appear below the previous document

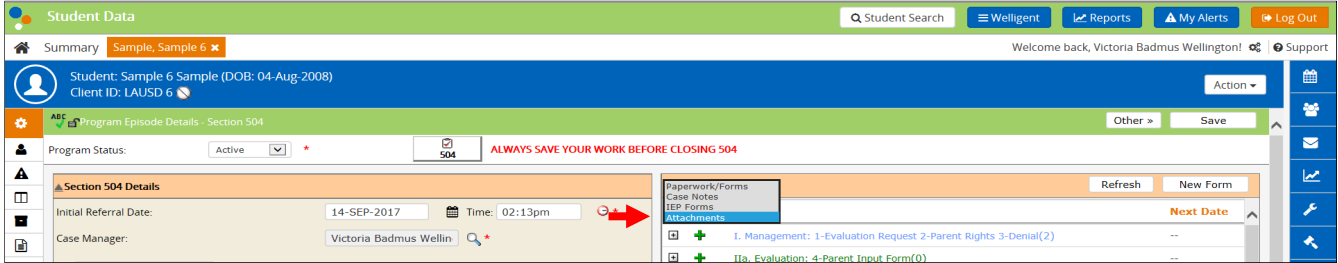


Welligent Section 504 Program Module Quick Sheet

Attachment B

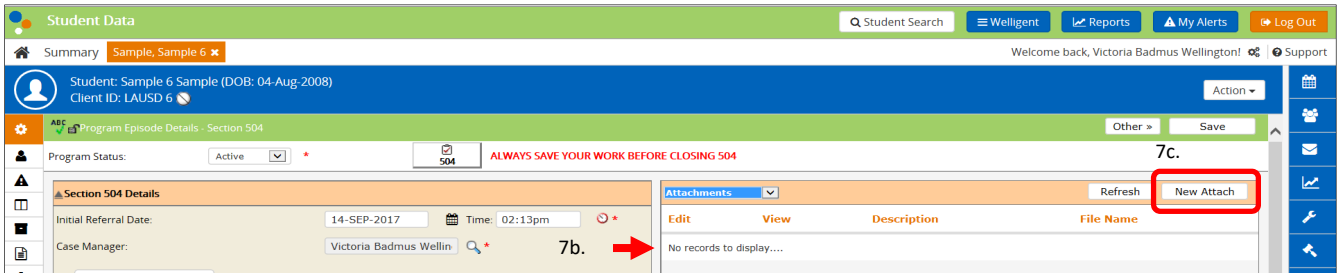
7. ATTACHING RELEVANT SECTION 504 DOCUMENTS TO THE STUDENT RECORD (Note that documents may not be deleted after they have been locked or uploaded)

a. Click the drop down arrow next to "Paperwork/Forms" and select "Attachments"



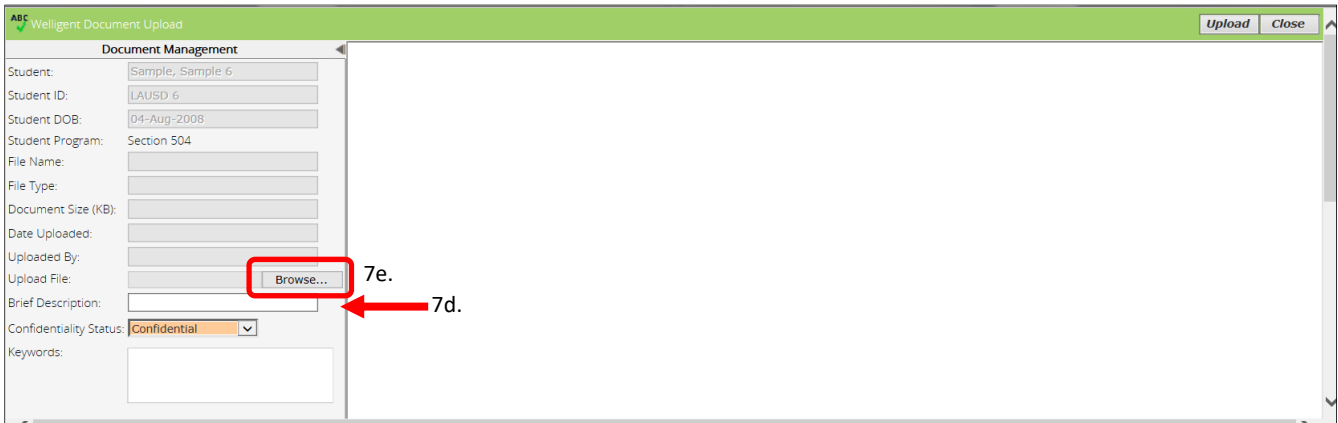
b. Any attached documents will appear in the Attachments window

c. Attach required documents by clicking the "New Attach" button



d. When the Welligent Upload window appears, enter a brief description of document that will be uploaded, i.e. "504 Plan 2/14/2014," "Parent Input form 2/12/2014," etc...

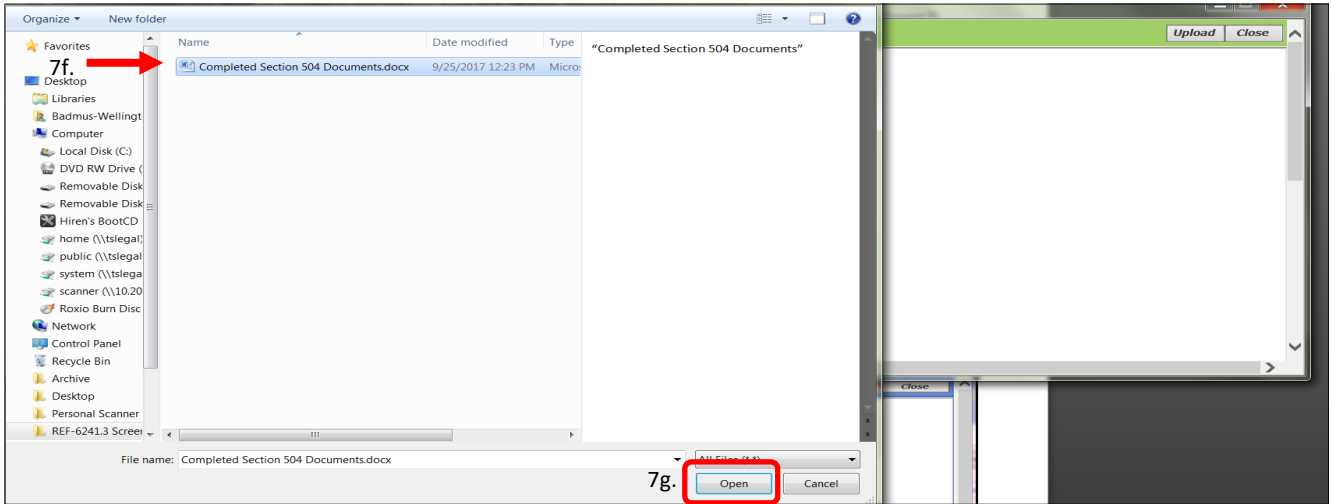
e. Click "Browse" button to locate the file to be uploaded



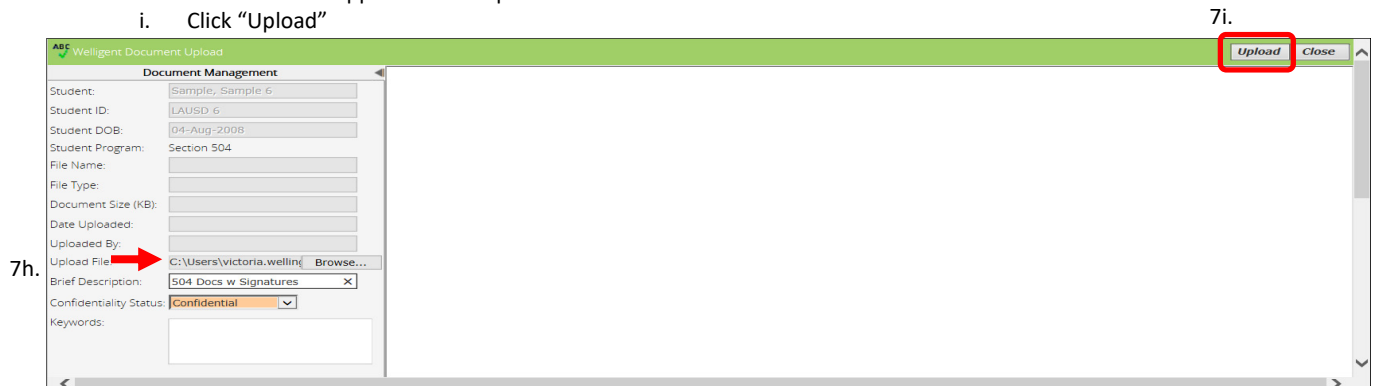
Welligent Section 504 Program Module Quick Sheet

Attachment B

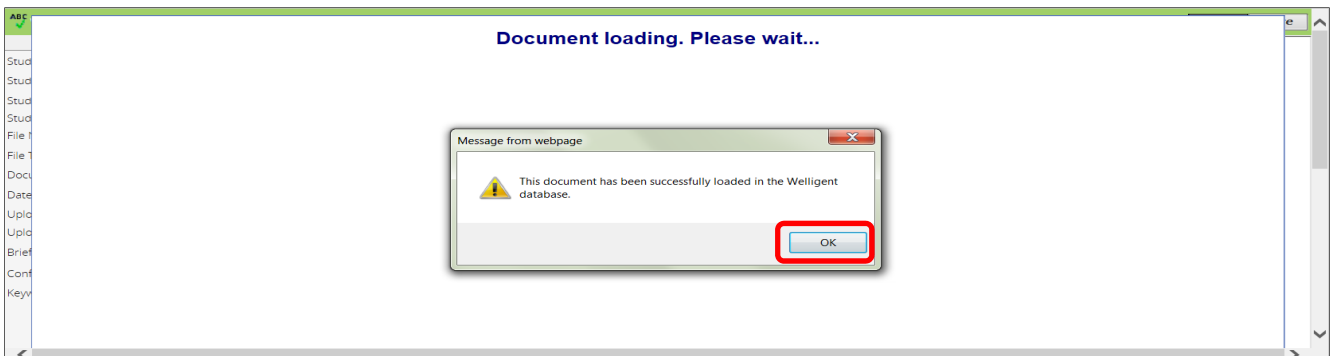
- f. Locate and select the file to be uploaded
- g. Click "Open"



- h. The file should appear in the "Upload File" field
- i. Click "Upload"



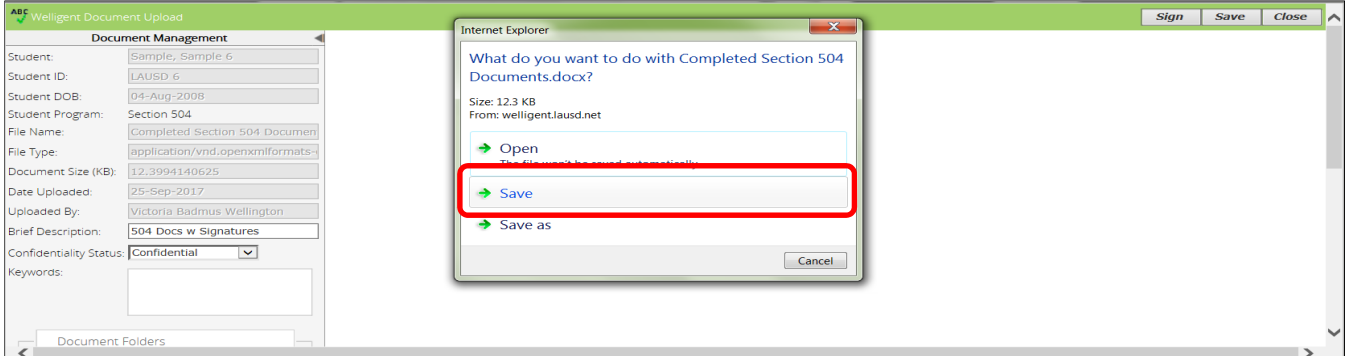
- j. Once the document is uploaded, a confirmation message should appear
- k. Click "Okay" to proceed



Welligent Section 504 Program Module Quick Sheet

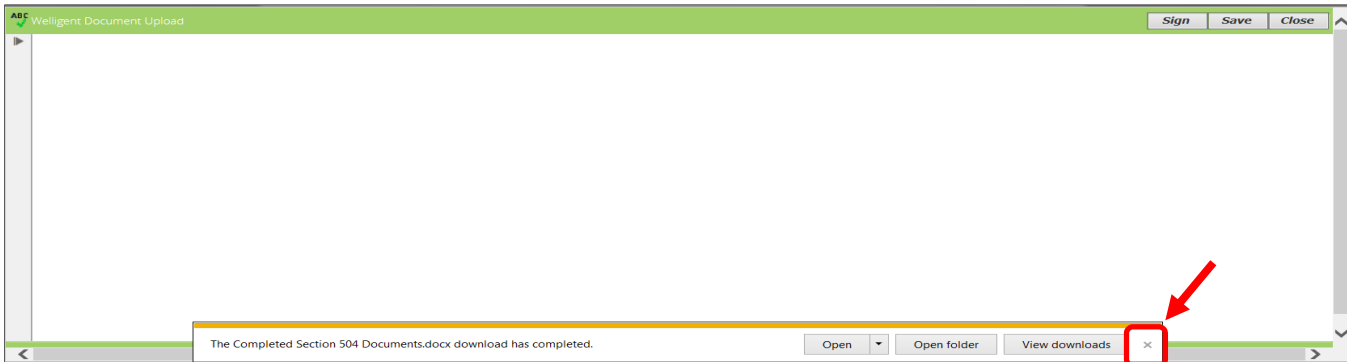
Attachment B

l. After clicking "Okay" if a confirmation window pops up, "select "Save"

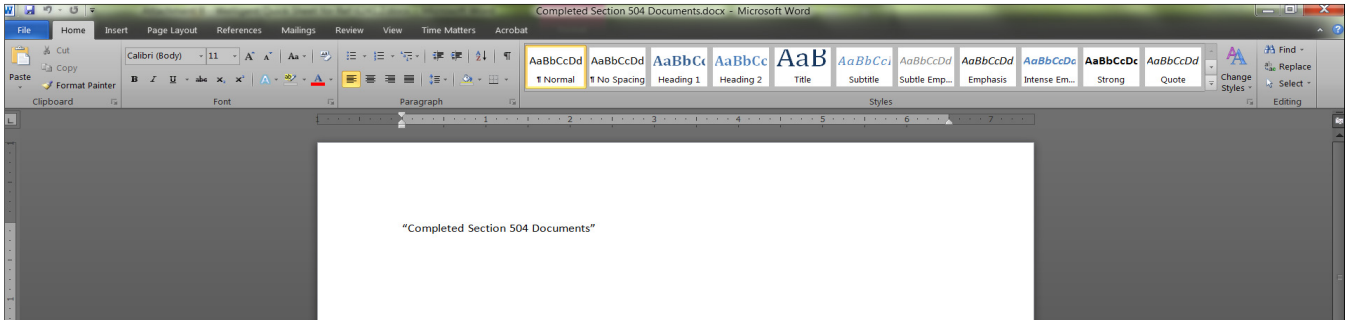


m. If a pop up window appears instead of the attached document, close it by clicking the "x" and then click "Save"

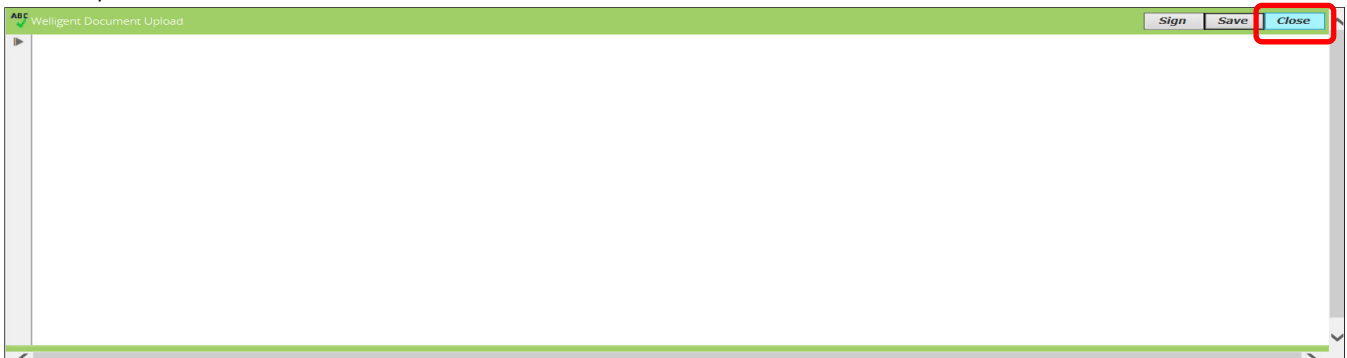
n. Click "Close" to close the window



o. If the attached document appears, close it by clicking the "x" otherwise go to the next screen below (7p.)



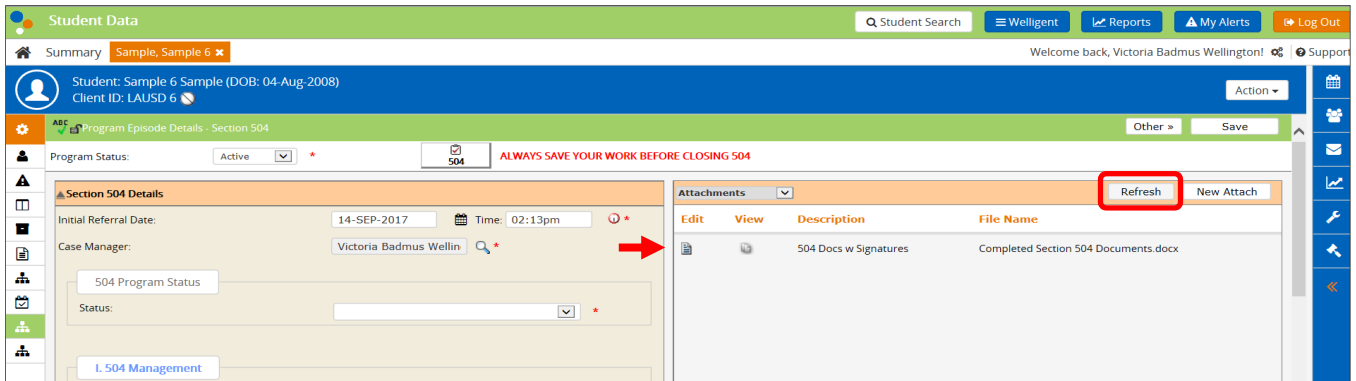
p. Select "Close" to return to the Section 504 Details screen



Welligent Section 504 Program Module Quick Sheet

Attachment B

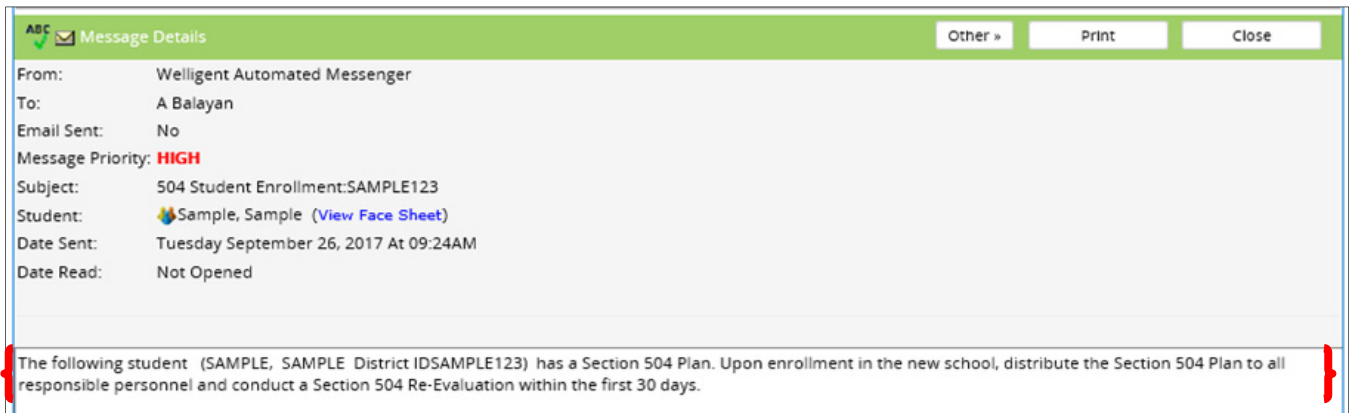
q. Select "Refresh" and the attached document(s) will appear



II. ADDITIONAL FEATURES

8. RECEIVING SYSTEM ALERTS

- a. Upon the enrollment of a student with an "Eligible" or "Pending" Section 504 status, all users at the receiving school with "School-Administrator" roles will receive the automated message below:

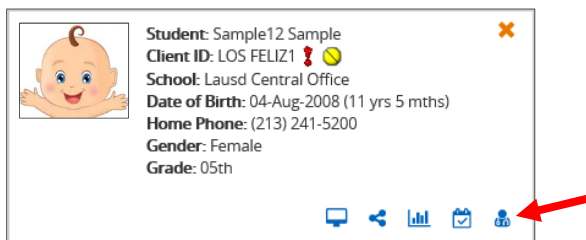


9. VIEWING STUDENT FACE SHEET FOR SECTION 504 STATUS

- a. Click on the Students picture on the top left corner



- b. You will receive a pop up window with the Students information
- c. Click on the Student icon on the bottom right corner



Welligent Section 504 Program Module Quick Sheet

Attachment B

Student: Sample12 Sample (DOB: 04-Aug-2008) (11 yrs 5 mths) (Grade:05th) (School:Lausd Central Office)
Client ID: LOS FELU21

LAUSD ADMINISTRATION DISTRICT

STUDENT FACE SHEET

STUDENT INFORMATION

Client ID:	LOS FELU21	Welligent ID:	1555855
Alt ID:		SS #:	
Last Name:	SAMPLE	First Name and Middle Initial:	SAMPLE12
Gender:	Female	Race/Ethnicity:	Black, Non-Hispanic/
AKA:		Sexual Orientation:	
Gender Identity:		Primary Case Manager:	LORENE HARRIS
Date of Birth:	04-Aug-2008		
State of Birth:	CA - California		
Home Address:	333 S BEAUDRY, LOS ANGELES, CA 90017		
Jurisdiction Division:			
Home Phone:	(213) 241-5200	Business Phone:	
Cellular/Alternate Phone:		Fax:	
Email:		Primary Language / Language Spoken in Home:	Swahili/
Preferred Language:	Swahili	School of Residence:	
Current Grade:	05th		

10. DELETING A SECTION 504 FORM (ONLY USE THIS FEATURE WHEN FORMS WERE MISTAKENLY CREATED)

Forms may not be deleted after they have been locked or uploaded. Instructions for locking a form can be found in Section 11.

- Click the black plus sign icon for either phase I, II, III, or IV, as appropriate, to locate the form to be deleted
- The number in parenthesis reflects the number of forms created in each phase

Student Data

Student: Sample 6 Sample (DOB: 04-Aug-2008)
Client ID: LAUSD 6

Program Status: Active

Section 504 Details

Initial Referral Date: 14-SEP-2017 Time: 02:13pm

Case Manager: Victoria Badmus Wellin

Paperwork/Forms

Date	Signed?	Approved?	Copy/Revision?
25-Sep-2017	No	NA	Add
25-Sep-2017	No	NA	Yes, Add

- Upon locating the document/form to be deleted, click "Edit"

Student Data

Student: Sample 6 Sample (DOB: 04-Aug-2008)
Client ID: LAUSD 6

Program Status: Active

Section 504 Details

Initial Referral Date: 14-SEP-2017 Time: 02:13pm

Case Manager: Victoria Badmus Wellin

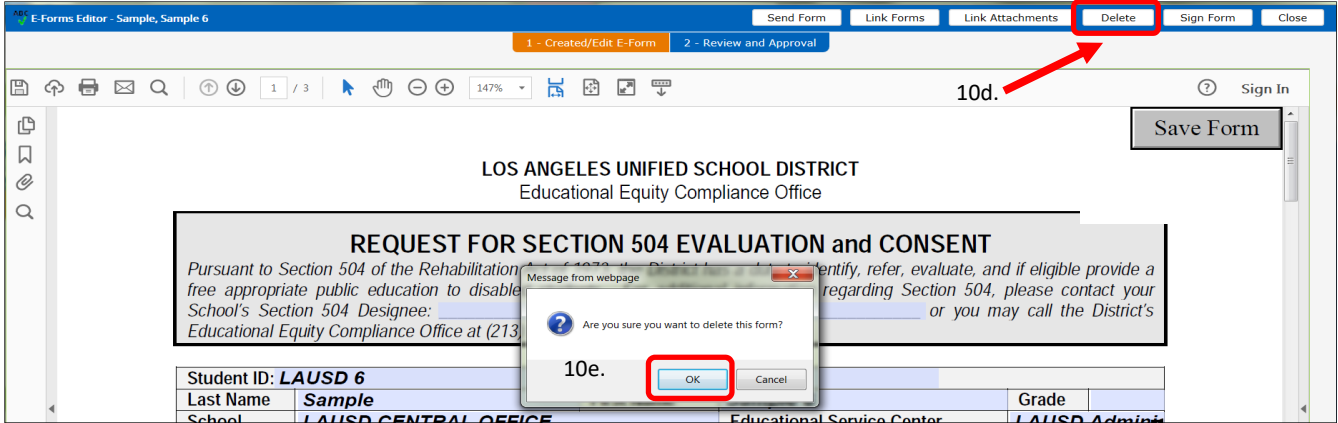
Paperwork/Forms

Date	Signed?	Approved?	Copy/Revision?
25-Sep-2017	No	NA	Add
25-Sep-2017	No	NA	Yes, Add

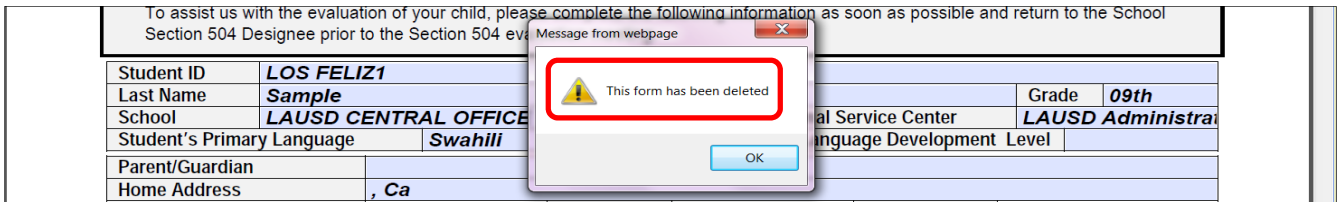
- Click "Delete"
- To delete the form click "OK"

Welligent Section 504 Program Module Quick Sheet

Attachment B

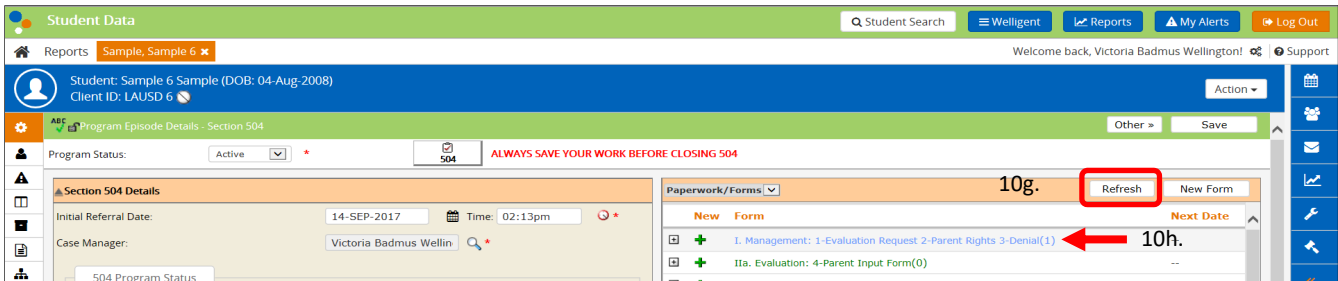


f. Upon deleting the form, a confirmation message should appear



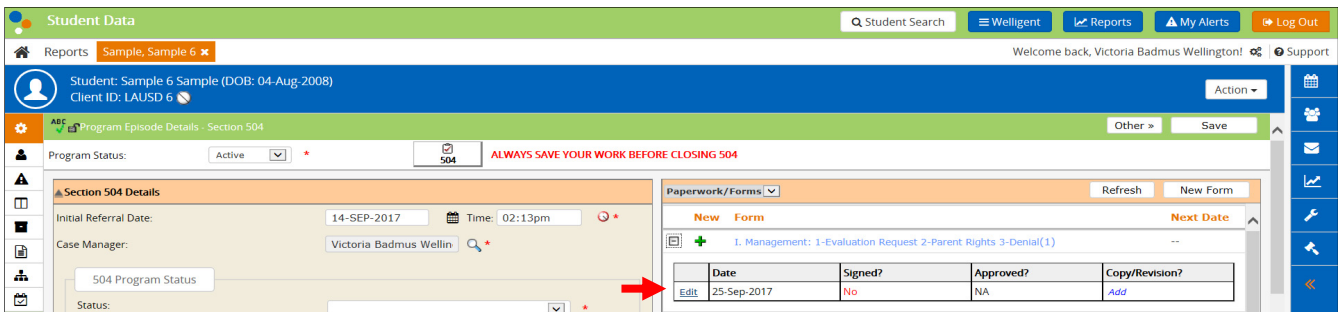
g. Upon returning to the Student Data window, click the "Refresh" button

h. The number in parenthesis should reflect the quantity of form versions



11. LOCKING a SECTION 504 FORM (This only applies to forms that were created in the Welligent Module. This feature does not apply to forms that were uploaded/attached)

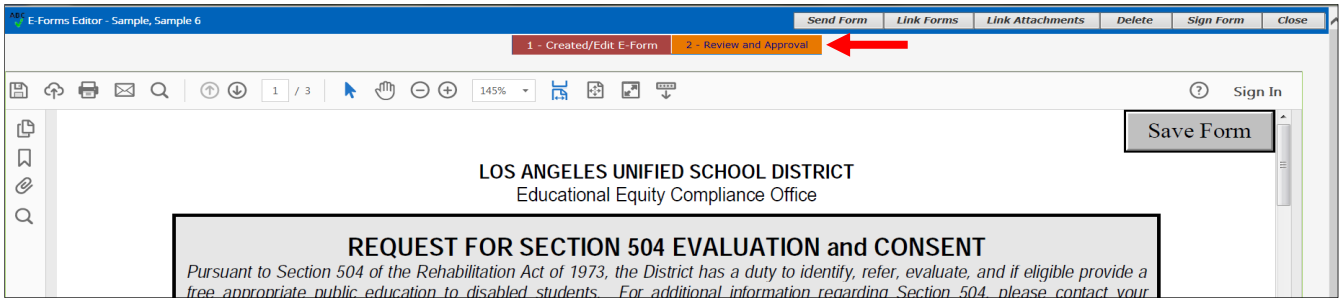
a. Click "Edit" to open the form to be locked



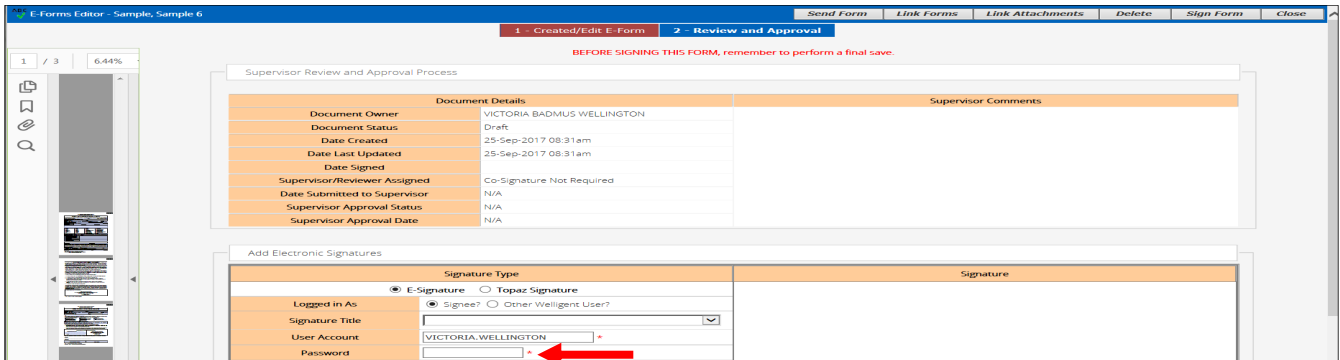
Welligent Section 504 Program Module Quick Sheet

Attachment B

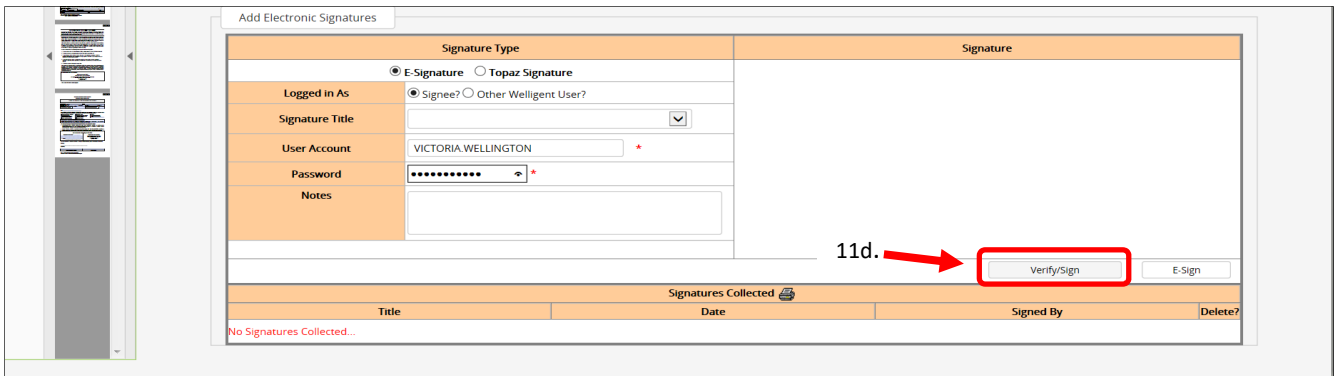
b. Upon opening the form to be locked, select "2-Review and Approval" from the menu



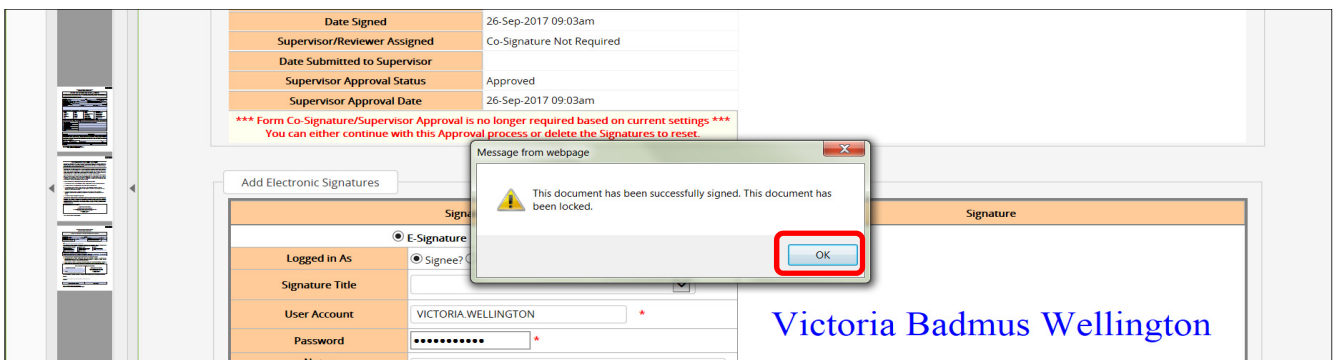
c. Verify your user account and enter password below



d. Click "Verify/Sign"



e. When the confirmation message appears, click "OK."



Welligent Section 504 Program Module Quick Sheet

Attachment B

- d. Select the school or District location as appropriate from the drop down menu by clicking the arrow. You may customize the report by Section 504 status. To generate a report of all students with 504 activity, leave the "Section 504 Status" field blank.
- e. After selecting the school or District location, click "Run"

