



# 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-6241.5

**ISSUER:** Devora Navera Reed, General Counsel  
Office of the General Counsel

Julie Hall- Panameño, Director  
Section 504 Coordinator  
Educational Equity Compliance Office

**ROUTING**  
All Schools  
Local District Administrators of Operations  
Local District Administrators  
Community of Schools Administrators  
School Site Administrators  
School Counselors  
School Nurses  
Section 504 Designees & Case Managers  
School Office Staff assigned to special education and Section 504 duties  
Teachers

**DATE:** August 29, 2022

**PURPOSE:** The purpose of this reference guide is to inform all District personnel of the mandate to: 1) conduct Section 504 evaluations for *all* students currently eligible with Section 504 plans; 2) conduct individualized determinations regarding the student’s need for Compensatory Education and/or Recoupment Services as a result of the COVID-19 pandemic; 3) transfer all Section 504 student records to the Welligent Management System’s enhanced Section 504 Program module; and 4) use the Welligent Management System to conduct and track all Section 504 activities.

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-6241.4, of the same title, issued February 10, 2020. The Section 504 module has been enhanced with an automated system comparable to the Welligent Individualized Education Program (IEP) Management System.

**By December 16, 2022**, all schools shall: (1) conduct Section 504 evaluations for every student eligible with a Section 504 plan; and (2) make an individualized determination regarding whether and to what extent Compensatory Education and/or Recoupment Services are required as a result of COVID-19 pandemic remote learning instruction and/or hybrid in-person and remote learning instruction since March 17, 2020 through the end of the 2021-2022 school year (the COVID-19 “Pandemic Period”).

Beginning with the 2022-23 school year, Section 504 teams shall use the automated



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Welligent Section 504 Program Module to conduct and track all Section 504 activities. Alternative means of documenting Section 504 activities will not be available or accepted. 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.

The Welligent Section 504 Program module has been enhanced 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 records shall be developed and maintained within the Welligent system. School personnel must use the Welligent Section 504 Program module when conducting all Section 504 activities including referral, evaluation, plan development, and follow-up, to 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 [Welligent Support](#).
    - B. Review *Welligent Support Technical Guide (Attachment A)* regarding minimum requirements for Windows and Macintosh operating systems to improve user functionality.
      - Google Chrome is the recommended browser for Microsoft Windows users when accessing the Welligent System.
      - Safari 6.X or higher and Google Chrome are recommended browsers for Macintosh users.
  - II. Section 504 Designees, Case Managers, and designated school office staff



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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: #1) 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. Access the “Inactive” Section 504 Program Module to locate the most current Section 504 Plan for each student enrolled at your school. Conduct a student record search in Welligent to identify all students eligible under Section 504 according to *Welligent Section 504 Program Module Quick Sheet* (Attachment B #2).
  - B. Access the new Section 504 Program Module and schedule a Section 504 evaluation for each student eligible with a Section 504 plan to be held **no later than December 16, 2022**.
  - 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 #3).
    1. Update/enter Section 504 details (Attachment B: #3).
    2. Scan and/or attach relevant Section 504 plan documents to the student record (Attachment B: #5).
  - D. For the 2022-23 school year only, **conduct a Section 504 evaluation for each student with a disability identified under Section 504 regardless of when the last evaluation was conducted and whether there is a current Section 504 plan in place.**
    1. For the 2022-23 school year, conduct an individualized determination regarding the student’s need for Compensatory Education and/or Recoupment Services as a result of the COVID-19 pandemic.
    2. The process for making individualized determinations for Compensatory Education and/or Recoupment Services must be conducted according to the guidance materials found on the District’s Division of Special Education website employee page, under Compensatory Education Plan/Recoupment Services at <https://achieve.lausd.net/Page/16796>.
- III. All records for future Section 504 initial evaluations, reevaluations, including 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 #3-5).
- IV. Upon accessing the Welligent Management System, follow instructions outlined in Attachment B when conducting the following activities, as necessary.
1. Generating a Section 504 Report to Identify All Eligible Section 504 Students



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2. Locating the Section 504 Student Record
  3. Creating the Section 504 Record for the First Time
  4. Navigating the Section 504 Program Module and Documenting Section 504 Activity
  5. Attaching Relevant Section 504 Documents to the Student Record
  6. Printing Section 504 Pages
  7. Locking a Section 504 Page (Lock functionality will come in a later release)
- 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 Responsibilities](#), issued by the Division of Special Education

[MEM-5818: Nondiscrimination Required Notices and Ordering of Student Brochures](#), issued by the Office of the General Counsel

**ATTACHMENTS:**

Attachment A - *Welligent Technical Support Guide*

Attachment B - *Welligent Section 504 Program Module Quick Sheet*

**ASSISTANCE:**

For further information, contact the following District Offices:

Educational Equity Compliance Office (EECO): (213) 241-7682, Email: [EquityCompliance@lausd.net](mailto:EquityCompliance@lausd.net)

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

Visit the Division of Special Education employee page for information about the COVID-19 Compensatory Education Plan and Recoupment Services: <http://achieve.lausd.net/Page/16796>



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Welligent Support: (213) 241-5200

District Nursing Services: (213) 202-7580

Your Local District Operations/Section 504 Designee

Office of ADA Compliance: (213) 241-4530.

Information Technology (ITD) Help Desk (213) 241-5200 <https://lausd.net-myit.onbmc.com>

## Welligent Technical Support Guide

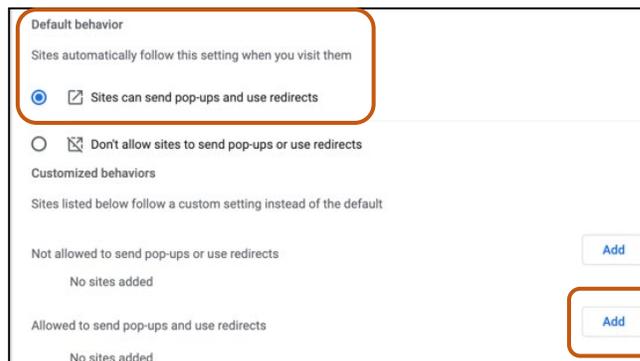
### Minimum Requirements for Windows & Macintosh Computers

Windows 10 or higher:	<b>Google Chrome</b>	
Mac OS:	<b>Google Chrome</b>	<b>Safari 6.X or higher</b>
Do not use:	Mozilla Firefox	Windows Edge

#### Chrome Settings on Windows

##### Pop-up Blocker *Pop-ups need to be allowed.*

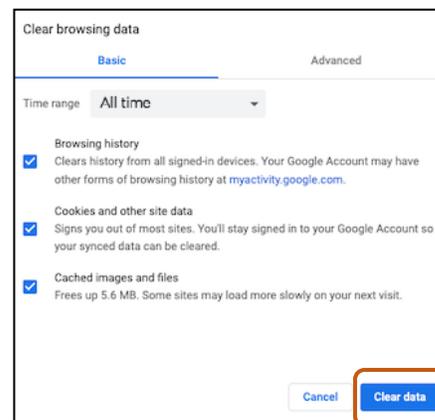
- Open **Chrome**.
- Click the **3 dots at the top right corner** (ellipsis)
- Click on **Settings**.
- Click on **Privacy and security**.
- Click on **Site Settings**
- Scroll down to Content and select **Pop-ups and redirects**.
- Select the radio button **Sites can send pop-ups and use redirects**.  
\*Or you can add [\*.]lausd.net to the Allowed sites at the bottom to only allow pop-ups from District sites.
- Close the windows.



##### Clear the Cache

*To maintain the system periodically repeat these steps.*

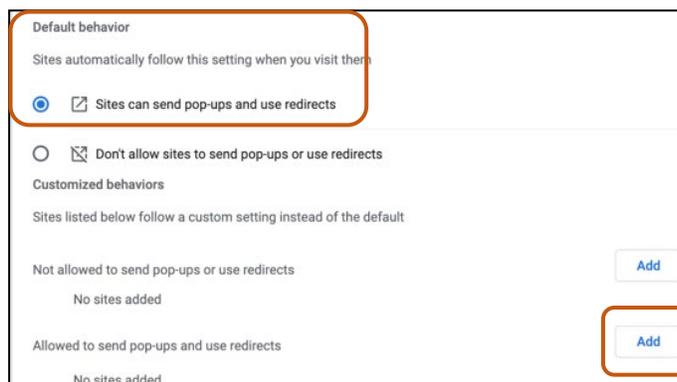
- Open **Chrome**
- Click the **3 dots at the top right corner** (ellipsis)
- Click on **Settings**.
- Click on **Privacy and security**.
- Click on **Clear Browsing Data**.
- From the Basic tab for Time range, select **All time**.
- Check **Browsing history**, **Cookies and other site data** and **Cached images and files**.
- Click **Clear data** at the bottom.



#### Chrome Settings on MAC

##### Pop-up Blocker *Pop-ups need to be allowed.*

- Open **Chrome**
- Click on **Chrome** at the top right side of the menu.
- Click on **Preferences**.
- Click **Privacy and security**.
- Click **Site Settings**.
- Scroll down to Content and click **Pop-ups and redirects**.
- Under *Sites automatically follow this setting when you visit them*, select **Sites can send pop-ups and use redirects**.  
\*Or you can add [\*.]lausd.net to the Allowed sites at the bottom to only allow pop-ups from District sites.
- Close the window.

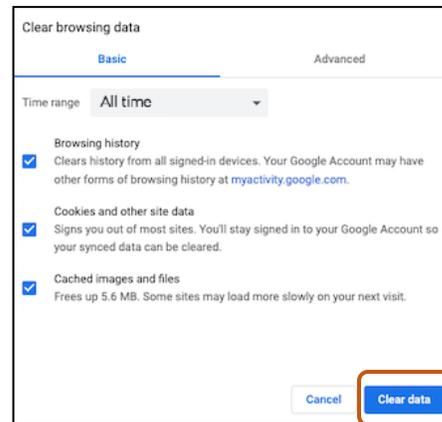


# Welligent Technical Support Guide

## Minimum Requirements for Windows & Macintosh Computers

### Clear the Cache, Cookies and History *To maintain the system periodically repeat these steps.*

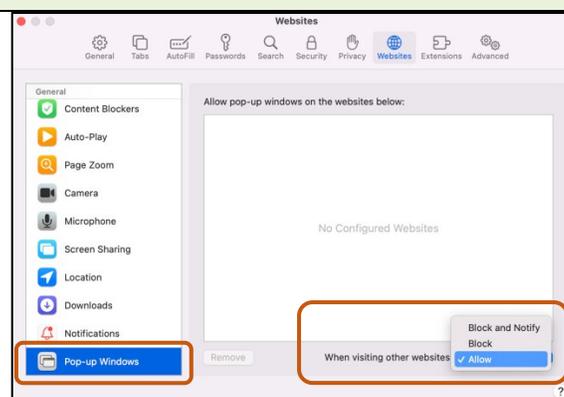
- Open **Chrome**
- Click on **Chrome** at the top right side of the menu.
- Click on **Clear Browsing Data**.
- From the Basic tab for Time range, select **All time**.
- **Check Browsing history, Cookies and other site data and Cached images and files.**
- Click **Clear data** at the bottom.



### Safari Settings on MAC

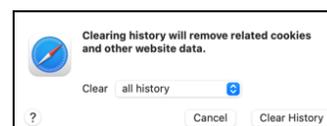
#### Pop-up Blocker *Pop-ups need to be allowed.*

- Open **Safari**.
- Click on **Safari** at the top right side of the menu.
- Click on **Preferences**.
- Click on the **Websites** tab.
- On the left, scroll down to the bottom and click on **Pop up Windows**.
- For *When visiting other websites*: select **Allow**.
- \*Or After using Welligent comeback to Websites and only allow for welligent.lausd.net
- Close the window.



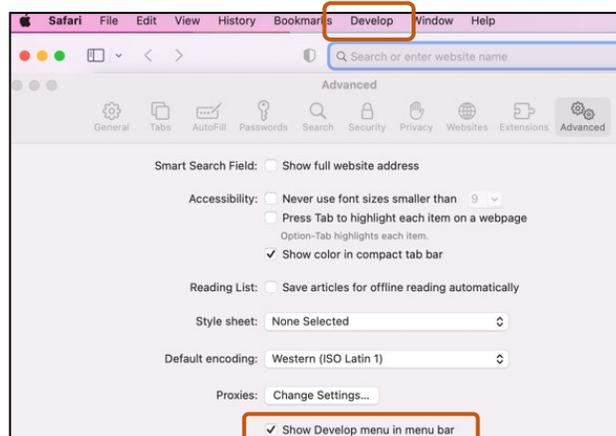
### Clear History *To maintain the system periodically repeat these steps.*

- Open **Safari**.
- Click on **Safari** at the top right side of the menu.
- Click on **Clear history**.
- For Clear selection, select **all history**.
- Click the **Clear History** button.



### Clear Cache *To maintain the system periodically repeat these steps.*

- Open **Safari**.
- Click on **Safari** at the top right side of the menu.
- Click on **Preferences**.
- Click on the **Advanced** tab of the menu that pops up.
- At the end of the tab, select the box for **Show Develop menu in menu bar** and close the Preferences menu.
- Click the **Develop** tab from the Safari menu at the top of the page.
- Click **Empty Caches** from the dropdown menu.
- To repeat go directly to **Develop** and **Empty Caches**.



*If you need assistance please call the helpdesk at (213) 241-5200 option 8 or create a Ticket: [lausd-myit.onbmc.com](https://www.lausd-myit.onbmc.com)*

## Welligent Section 504 Program Module Quick Sheet

### 1. GENERATING A SECTION 504 REPORT TO IDENTIFY ALL ELIGIBLE SECTION 504 STUDENTS

a. Login to Welligent homepage and click "Reports."



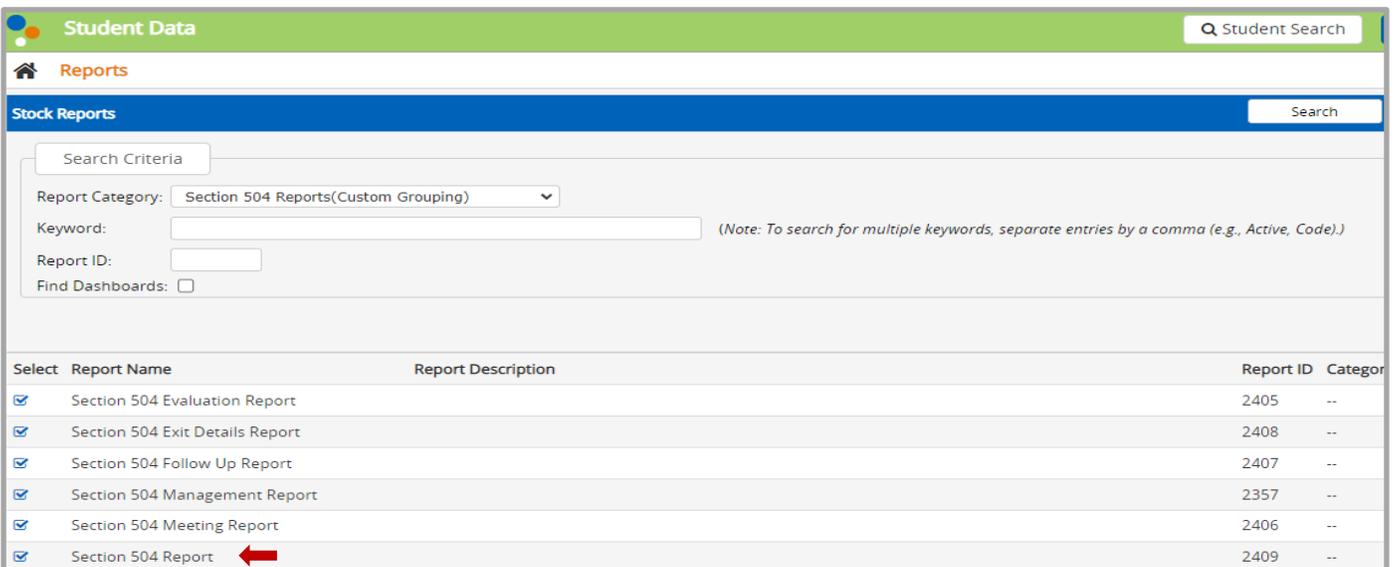
b. Open the "Report Category" dropdown menu.



c. Select "Section 504 Reports (Custom Grouping)" from the dropdown menu.

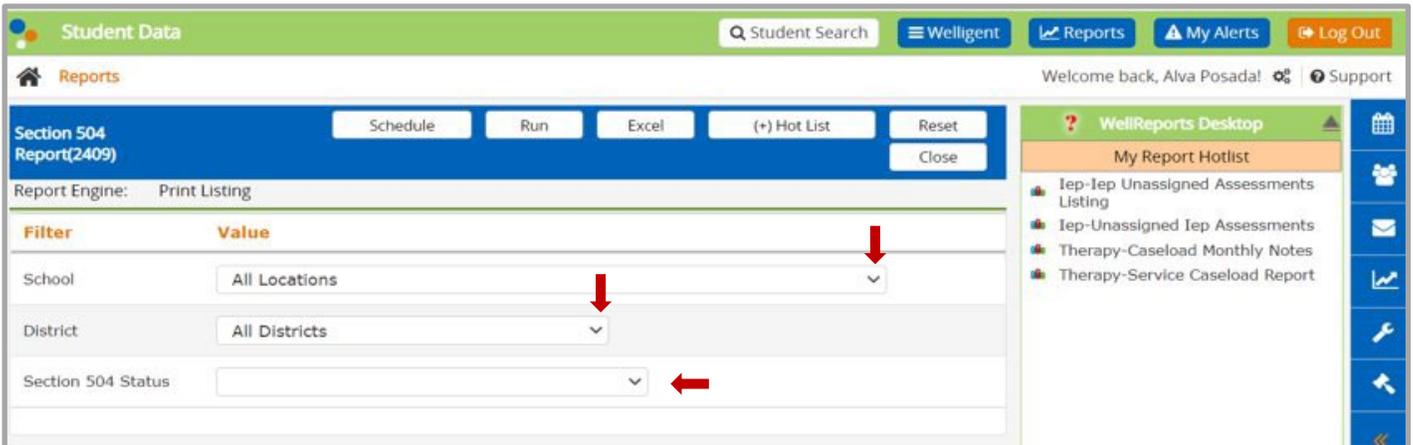


d. In the Report Name field, click on "Section 504 Report" or desired Section 504 report.

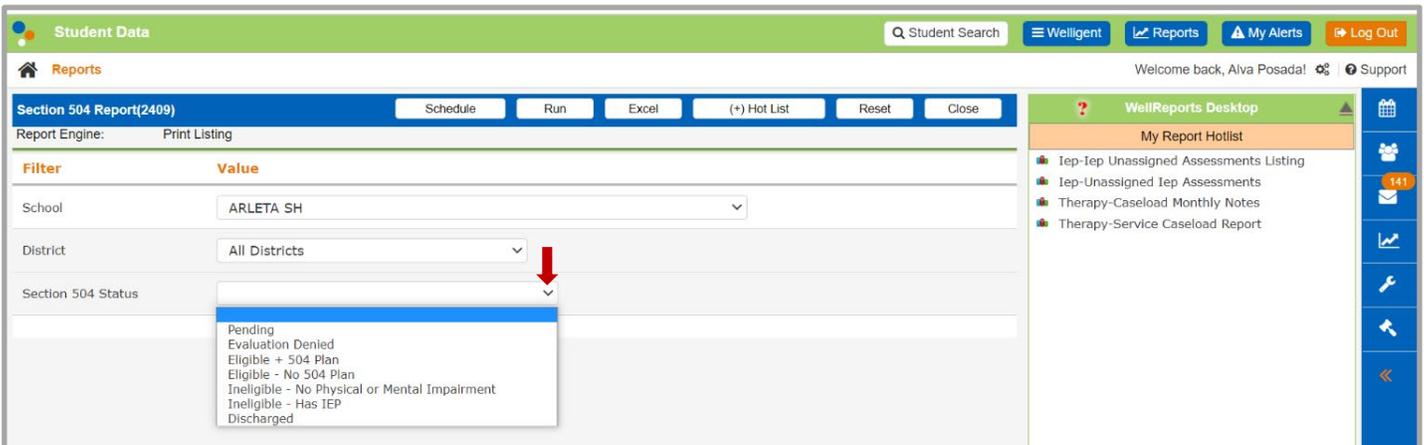


## Welligent Section 504 Program Module Quick Sheet

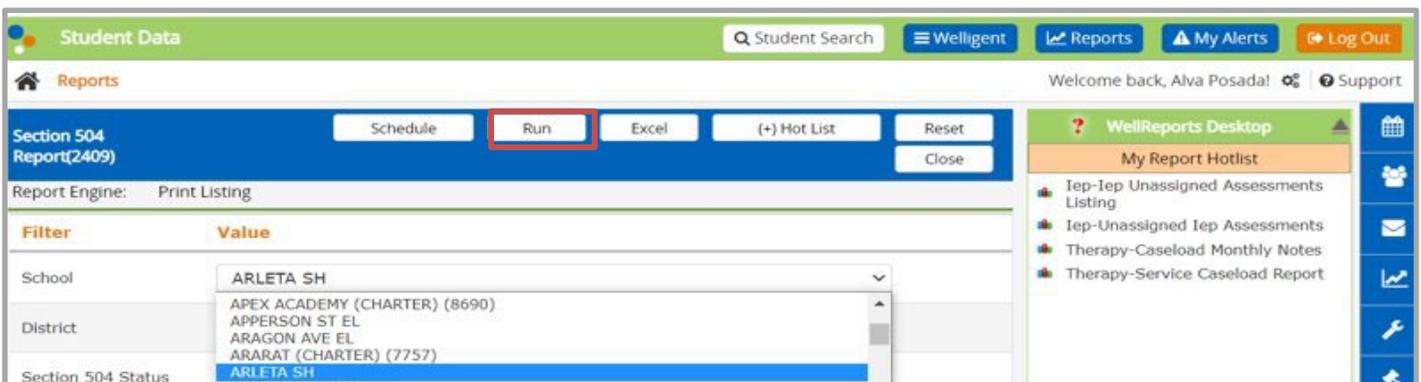
- e. Select the School or District as appropriate from the drop-down menu by clicking the arrow.
- You may customize the report by "Section 504 Status" from the drop-down menu by clicking the arrow.



- To generate a report of all students with 504 activities, leave the "Section 504 Status" field blank.



- f. After selecting the School or District location click "Run."



## Welligent Section 504 Program Module Quick Sheet

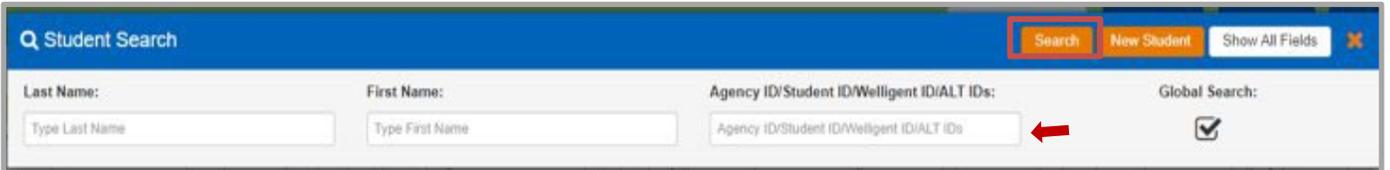
### 2. LOCATING THE SECTION 504 STUDENT RECORD

a. Select the “Student Search” tab at the top of the Welligent screen.



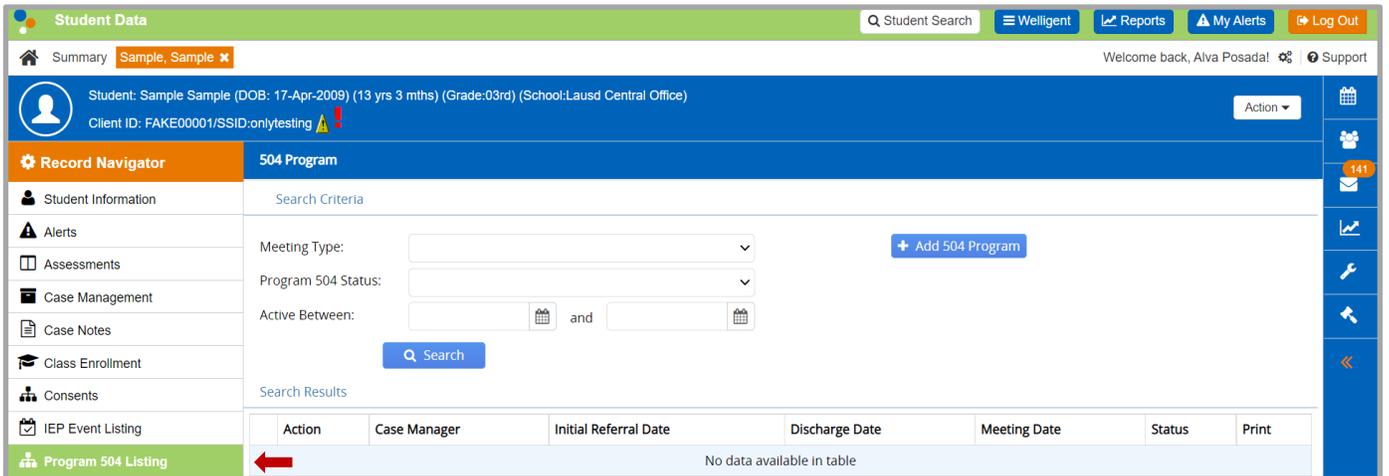
b. Enter Student ID # in the “Agency ID/Student ID” field (for private school students who have no Student ID, contact Welligent Support).

c. Click the “Search” button.



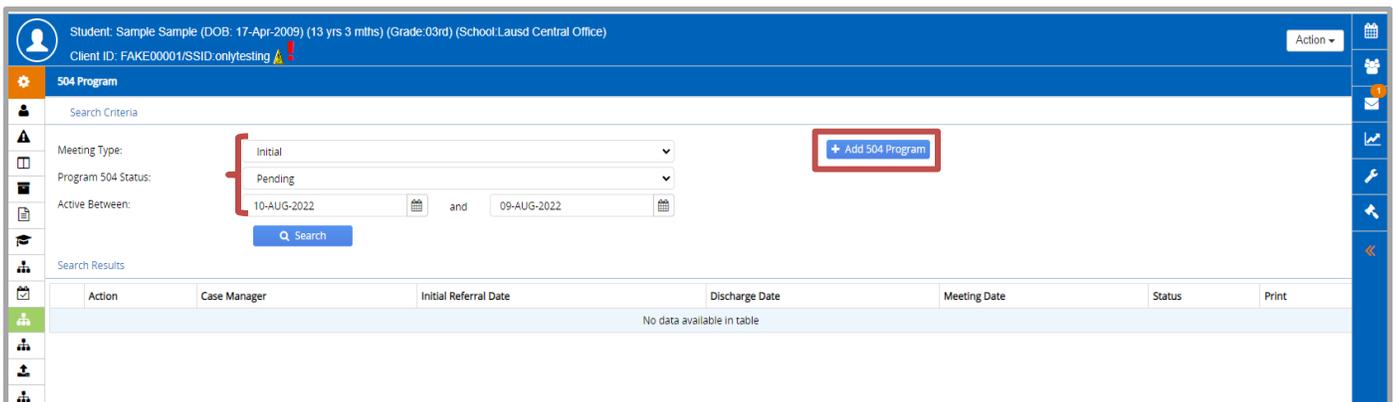
### 3. CREATING THE SECTION 504 RECORD FOR THE FIRST TIME

a. In Record Navigator, select “Program 504 Listing.”



b. Enter the necessary Section 504 details. You will need to enter information into every field that contains an asterisk.

c. Select “Add 504 Program.”



## Welligent Section 504 Program Module Quick Sheet

d. Select "Save."

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

504 Program [Save] [Close]

504 Management | Student Information

504 Details

Student ID: FAKE00001 Initial Referral Date: 18-AUG-2022 Meeting/Plan Date:  
Meeting Type: Initial Program 504 Status: Pending 504 Case Manager: Test User3  
Referring Individual: Mr. Sample Relationship to Student: Father

e. You should receive a confirmation. Click "OK."

Student Data

Summary Sample, Sample

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

504 Program [Save] [Close]

504 Management | Student Information

wellst.lausd.net says  
Student successfully enrolled to 504 program

[OK]

### 4. NAVIGATING THE SECTION 504 PROGRAM MODULE AND DOCUMENTING SECTION 504 ACTIVITY

a. Select each tab under 504 Program: "Management," "Evaluation," "Meeting," "Follow-Up," and "Services" and proceed through the phases of the Section 504 process and complete the required information.

Student: Sample 13 E Sample (DOB: 19-Jan-2002) (20 yrs 6 mths) (Grade:Ungraded) (School:Lausd Central Office)  
Client ID: LAUSD13

504 Program [Save] [Close]

Management Evaluation Meeting Follow-Up Services

504 Details

Student ID: LAUSD13 Initial Referral Date: 11-Aug-2022 Meeting/Plan Date:  
Meeting Type: Initial Program 504 Status: Pending 504 Case Manager: Rsp Administrator1  
Referring Individual: Relationship to Student: English Language Development Level:  
Local District: Student's Primary Language: FAPE Loss:

Referral Info

Description	Entered By	Received Date	Status	
Request for Section 504 Evaluation and Consent (Form 1)			Pending	Add
Section 504 Parent Procedural Safeguards (Form 2)			Pending	View
			Pending	Add

Attached Documents

## Welligent Section 504 Program Module Quick Sheet

b. For example, under the “Management” tab, select “Add” to generate a page so that you may enter data or “View” to view a page previously created.

Student: Sample 13 E Sample (DOB: 19-Jan-2002) (20 yrs 6 mths) (Grade:Ungraded) (School:Lausd Central Office)  
Client ID: LAUSD13

504 Program

Management | Evaluation | Meeting | Follow-Up | Services

504 Details

Student ID: LAUSD13 | Initial Referral Date: 11-Aug-2022 | Meeting/Plan Date: |  
Meeting Type: Initial | Program 504 Status: Pending | 504 Case Manager: Rsp Administrator1  
Referring Individual: | Relationship to Student: | English Language Development Level: |  
Local District: | Student's Primary Language: | FAPE Loss: |

Referral Info

Description	Entered By	Received Date	Status	
Request for Section 504 Evaluation and Consent (Form 1)			Pending	Add +
Section 504 Parent Procedural Safeguards (Form 2)			Pending	View

c. Select the arrows on the right or left to expand each section and complete each page. Use the scroll bar on the right to navigate through the form. Select “Save.”

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

504 Program

Request for Section 504 Evaluation and Consent (Form 1)

Management | 504 Program - Request for Section 504 Evaluation and Consent (Form 1)

504 Details

Student ID: 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  
Meeting Type: School's Section 504 Designee: at (Phone):  
Referring Individual: or you may call the District's Educational Equity Compliance Office at (213) 241-7682.  
Local District: What is the reason for the request? (Clarify Student's needs and area(s) of concern)  
Referral Info: What major life activity is substantially limited? (Check all that apply below.)

Description

<input type="checkbox"/> Learning	<input type="checkbox"/> Seeing	<input type="checkbox"/> Bending	<input type="checkbox"/> Brain Function
<input type="checkbox"/> Reading	<input type="checkbox"/> Hearing	<input type="checkbox"/> Standing	<input type="checkbox"/> Reproductive function
<input type="checkbox"/> Concentrating	<input type="checkbox"/> Eating	<input type="checkbox"/> Performing manual tasks	<input type="checkbox"/> Circulatory function
<input type="checkbox"/> Working	<input type="checkbox"/> Speaking	<input type="checkbox"/> Bowel function	<input type="checkbox"/> Neurological function

## Welligent Section 504 Program Module Quick Sheet

- d. Follow the same process to proceed through the remaining tabs and complete the Section 504 phases.
- e. To generate Teacher Observation and/or Parent Input forms to distribute, select "Add" then "save."
- f. For the Evaluation phase, multiple forms may be generated for students who have multiple teachers/providers/parents by selecting "Add," then entering and saving the information either during or before the Section 504 meeting.

Student Data | Student Search | Welligent | Reports | My Alerts | Log Out

Summary Sample, Sample x | Welcome back, Alva Posada!

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

**504 Program** | Save | Close

Management | **Evaluation** | Meeting | Follow-Up | Services

504 Details | Last Modified: 08/11/2022 12:52 pm

Description	Action
Section 504 Parent Input Form (Form 4)	Add +
Section 504 Teacher Observation Form (Form 5)	Add +

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

**504 Program** | Save | Close

Management | Evaluation | **Meeting** | Follow-Up | Services

504 Details | Last Modified: 08/11/2022 12:52 pm

Description	Entered By	Received Date	Status	Action
Notice of Section 504 Evaluation Meeting (Form 6)			Pending	Add +
Section 504 Evaluation (Form 7)			Pending	Add +
Section 504 Plan (Form 8)			Pending	Add +
Notice of Section 504 Eligibility Determination (Form 9)			Pending	Add +
Pandemic Learning Loss Consideration of Compensatory and/or Recoupment Services			Pending	Add +

504 Meeting notes

Meeting Notes: (4000 character max)

Student: Sample Sample (DOB: 17-Apr-2009) (13 yrs 3 mths) (Grade:03rd) (School:Lausd Central Office)  
Client ID: FAKE00001/SSID:onlytesting

**504 Program** | Save | Close

Management | Evaluation | Meeting | **Follow-Up** | Services

504 Details | Last Modified: 08/11/2022 12:52 pm

Description	Entered By	Received Date	Status	Action
Section 504 Plan Distribution Notice (Distribution Form)			Pending	Add +
Section 504 Complaint Form (Form 10)			Pending	Add +
Section 504 Plan Parent Request to Revoke Consent (Form 11)			Pending	Add +

## Welligent Section 504 Program Module Quick Sheet

### 5. ATTACHING RELEVANT SECTION 504 DOCUMENTS TO THE STUDENT RECORD

- a. In the "Management" tab, select "Attach File."
- b. When the upload window appears, locate the document on your computer. Make sure the document is appropriately labeled.
- c. The file should appear in the "Attached Documents" section.

**Student Data** | Student Search | Welligent | Reports | My Alerts | Log Out

Summary: Sample, Sample 13 E

Welcome back, Alva Posada

Student: Sample 13 E Sample (DOB: 19-Jan-2002) (20 yrs 6 mths) (Grade:Ungraded) (School:Lausd Central Office)  
Client ID: LAUSD13

**504 Details**

Student ID: LAUSD13 | Initial Referral Date: 11-Aug-2022 | Meeting/Plan Date: | 504 Case Manager: Rsp Administrator1

Meeting Type: Initial | Program 504 Status: Pending | English Language Development Level: | FAPE Loss: \*

Referring Individual: | Relationship to Student: | Student's Primary Language: |

Local District: |

**Referral Info**

Description	Entered By	Received Date	Status	
Request for Section 504 Evaluation and Consent (Form 1)			Pending	Add
Section 504 Parent Procedural Safeguards (Form 2)			Pending	View
			Pending	Add

**Attached Documents**

Total Attached Documents 0

File Name | Category | Uploaded By | Date Uploaded

Attach File

### 6. PRINTING SECTION 504 PAGES

- a. Select 504 Program Listing or use the computer back browser to return to the 504 Program Screen.

<https://wellst.lausd.net/pls/iepw...>

wellst.lausd.net/pls/iepw/wellnet.wellmain

New Tab | CFR | eCFR — Code of Fe... | ED Code Database | EEOC GUIDANCE: R... | Percentage Differen... | Downtown's Favorit... | Grandma's Famous... | Welligent Integrate... | LAUSD Educators ~... | Tools for Tolerance...

**Student Data** | Student Search | Welligent | Reports | My Alerts | Log Out

Summary: Sample, Sample

Welcome back, Victoria Badmus Wellington

Student: Sample 5 Sample (DOB: 23-Jan-2018) (4 yrs 7 mths) (Grade:D4H) (School:Lausd Central Office)  
Client ID: HAMASAKI 1/Alt ID:5043807/SSID:36063

**504 Program** | Print English | Print Spanish | Save | Close

Management | Evaluation | Meeting | Follow-Up | Services

**504 Details**

Student ID: HAMASAKI 1 | Initial Referral Date: 12-Aug-2022 | Meeting/Plan Date: | 504 Case Manager: Backup 003

Meeting Type: Initial | Program 504 Status: Pending | English Language Development Level: | FAPE Loss: \*

Referring Individual: | Relationship to Student: | Student's Primary Language: |

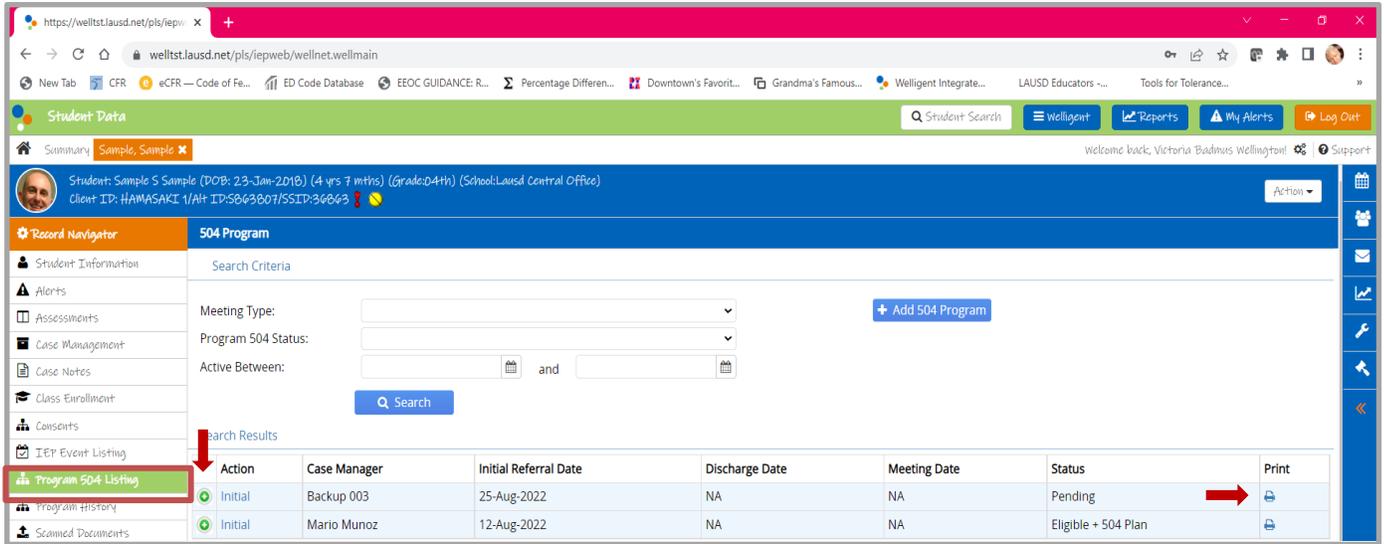
Local District: los angeles |

**Referral Info**

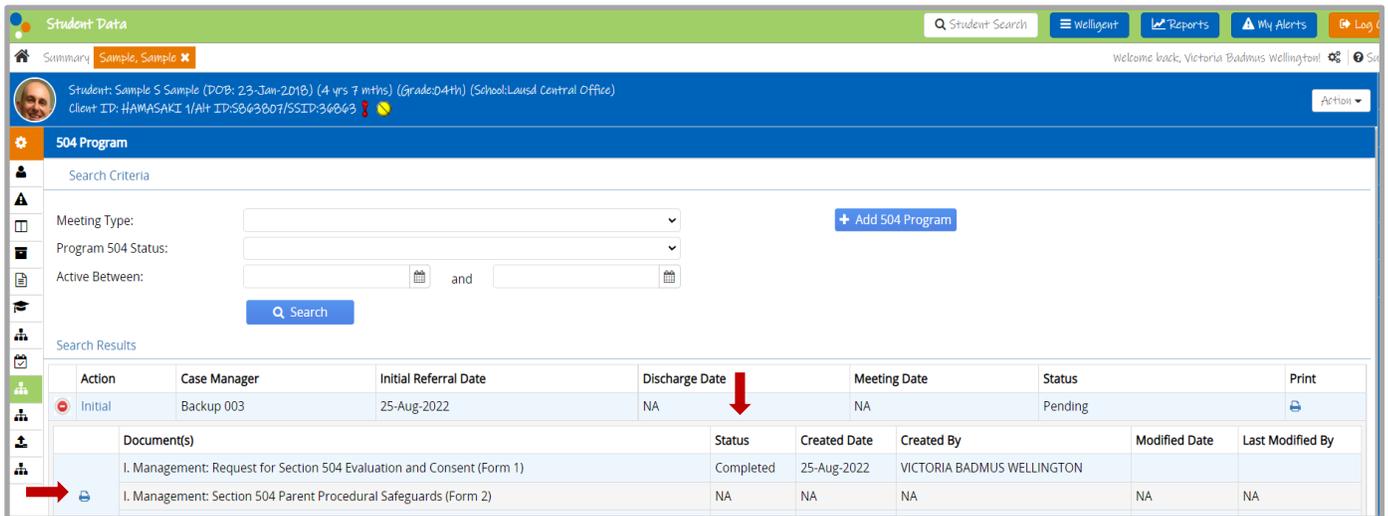
Description	Entered By	Received Date	Status	
Request for Section 504 Evaluation and Consent (Form 1)	Victoria Badmus Wellington	25-Aug-2022	Completed	View
Section 504 Parent Procedural Safeguards (Form 2)				View

## Welligent Section 504 Program Module Quick Sheet

- b. To print all documents *required for distribution* (not every page) to the 504 Team/Parents, select the Print icon to the right of the record.
- c. To prepare to print each document by page, select "Program 504 History."
- d. Select + icon to collapse/view a list of documents.



- e. A print icon will only show for documents that have been saved or completed.



### 7. LOCKING A SECTION 504 PAGE

- a. Lock functionality will come in a later release.