



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-6241.2

ISSUER: David Holmquist, General Counsel
Office of General Counsel

Julie Hall-Panameño, Director
Educational Equity Compliance Office

DATE: April 8, 2015

ROUTING

Educational Service Centers
Administrators of
Operations
Principals
Administrators
School Counselors
School Nurses
Section 504 Designees
Section 504 Case Managers
MCD Clerks (Senior Office
Techs & Office Techs -
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.

This reference guide outlines procedures and instructions for Section 504 Designees, Case Managers, and Modified Consent Decree (MCD) Clerks (Senior Office Technicians and Office Technicians 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-6241.1. All Section 504 student information in SIS was migrated to the Welligent System; therefore, 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. Effective immediately, all Section 504 forms are required to be developed and saved within the Welligent system. The Welligent Quick Sheet (Attachment B) has been revised to include instructions for saving forms within the Welligent Section 504 Program Module.

BACKGROUND: Section 504 of the Rehabilitation Act of 1973 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

LOS ANGELES UNIFIED SCHOOL DISTRICT

REFERENCE GUIDE

BACKGROUND (continued):

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 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.

During the 2013-2014 school year, the Welligent Section 504 Program module was developed to provide increased access to students' Section 504 records. 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 Modified Consent Decree Clerks 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 at <https://idmlogin.lausd.net/myprofile/>

B. Review the following system information from the Welligent Management System Home Page and make necessary adjustments to their computer settings:

“Users are reporting issues with saving data when using Internet Explorer 11 as their browser. On Compatibility View Settings, be sure to add the Welligent website and check the box next to Display Intranet sites in Compatibility View. After completing the following instructions, you will need to logoff from Welligent and then login to update your computer settings”:

1. Click **Tools>Compatibility View Settings**.
2. Under **Add this website** enter <https://welligent.lausd.net> click on Add (it will display as **lausd.net**).

LOS ANGELES UNIFIED SCHOOL DISTRICT

REFERENCE GUIDE

PROCEDURES (continued):

3. Check the box next to **Display Intranet site in Compatibility View**.
4. Remove all other checks.
5. Click on **Close**

C. Review *Welligent Technical Requirements: PDF Forms* (Attachment A) regarding minimum requirements for Windows and Macintosh operating systems to improve user functionality.

II. Section 504 Designees, Case Managers, and MCD Clerks 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.

1. Locate the most current Section 504 Plan for each student
 - a. If the Section 504 Plan cannot be located in the student’s cumulative record folder, follow procedures in *BUL-4692.4 Section 504 of the Rehabilitation Act of 1973*, dated November 14, 2014, to conduct a Section 504 re-evaluation using the *Welligent Management System Section 504 Program* module as outlined in Section III of this reference guide.
2. 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).
 - a. If a record has been created, review Section 504 Details and update if necessary.
 1. Review Welligent Section 504 documents to determine if they are complete and delete any duplication (Attachment B: #10).
 2. If no documents can be located, check to see if the records were previously scanned and attached (Attachment B: #7).
 - b. If there is no Section 504 student record in the Welligent Program module for a student who has a Section 504 plan in the cumulative record, proceed to step 3 below.
3. Create a Section 504 record in the Welligent Section 504 Program module for each student following the procedures outlined in

LOS ANGELES UNIFIED SCHOOL DISTRICT

REFERENCE GUIDE

PROCEDURES (continued):

Welligent Section 504 Program Module Quick Sheet
(Attachment B).

- a. Update/enter Section 504 details (Attachment B: #5).
 - b. 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: #3-6).
- IV. Upon accessing the Welligent Management System, follow instructions outlined in the *Welligent Section 504 Program Module Quick Sheet* (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. Viewing Student Face Sheet for Section 504 Status
 10. Deleting a Section 504 Form
 11. Locking a Section 504 Form
 12. Generating a Section 504 Report
- V. Welligent Section 504 Program module users may utilize the following options for additional assistance:
- A. Learning Zone Registration – *Welligent Section 504 Lab*
Hands-on training lead by an instructor in a computer lab regarding the use of the Welligent Section 504 Program Module to generate Section 504 reports, create records, and update Section 504 details.
 - B. Learning Zone Training – *Special Education and Section 504 MCD Clerk Training (2014-2015)*
Outlines procedures, specific roles, and responsibilities of clerical staff assigned special education and Section 504 tasks as required by the MCD.
 - C. Learning Zone Training – *Section 504 Procedures*
Outlines the four phases of the Section 504 process on the Learning Zone Portal at <https://lz.lausd.net/lz/index.jsp>.

LOS ANGELES UNIFIED SCHOOL DISTRICT

REFERENCE GUIDE

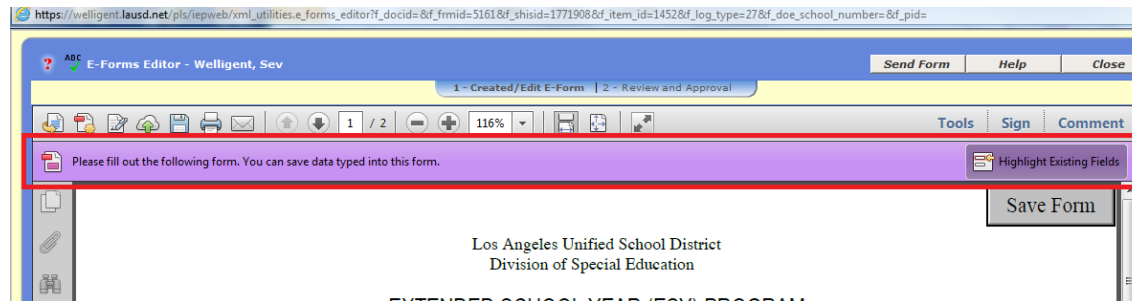
AUTHORITY:	<p>This is a policy of the Superintendent of Schools. The following legal standards are applied in this policy:</p> <p>42 USC §12101 et seq., 28 C.F.R. Part 35 - The Americans with Disabilities Act of 1990 - Nondiscrimination on the Basis of Disability in State and Local Government Services</p> <p>34 C.F.R. Part 104 - Section 504 of the Rehabilitation Act of 1973 - Nondiscrimination on the Basis of a Disability in Programs and Activities Receiving or Benefiting from Federal Financial Assistance</p> <p>California Education Code Chapter 2, Educational Equity - Article 3, Prohibition of Discrimination §220</p>
RELATED RESOURCES:	<p><i>BUL-4692.4 Section 504 of the Rehabilitation Act of 1973</i>, issued by the Office of General Counsel</p> <p><i>REF-5640.2 Clerical Support for Special Education and Section 504 as Required by the Modified Consent Decree</i>, issued by the Division of Special Education</p>
ASSISTANCE:	<p>For further information, contact the following District Offices:</p> <p>Educational Equity Compliance Office (EECO): (213) 241-7682, Julie Hall-Panameño, Director/District Section 504 Coordinator Victoria Badmus-Wellington, Coordinator Visit the EECO website for related information: http://achieve.lausd.net/eeco</p> <p>District Nursing Services: (213) 202-7580</p> <p>Your District Operations/Section 504 Designee</p> <p>Information Technology (IT) Help Desk (213) 241-5200</p>
ATTACHMENTS:	<p>Attachment A - <i>Welligent Technical Requirements: PDF Forms</i> Attachment B - <i>Welligent Section 504 Program Module Quick Sheet</i></p>

Welligent Technical Requirements: PDF Forms

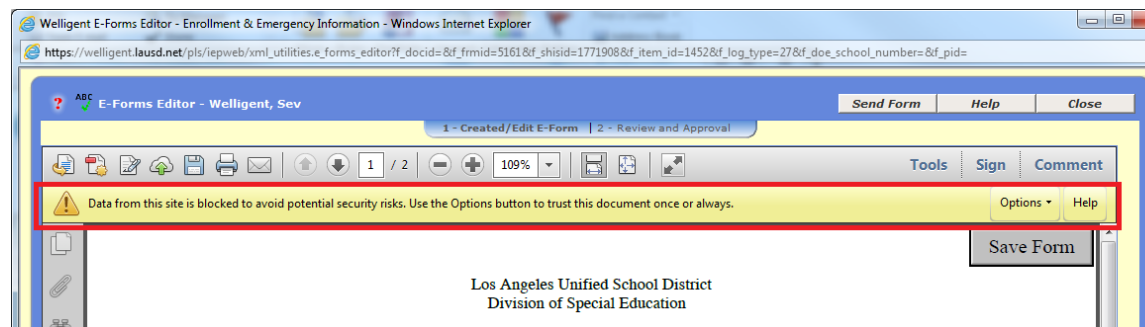
Attachment A

Opening a PDF form in Welligent

When opening a PDF form, ensure the top section of the form displays a purple bar and states “Please fill out the following form.....”.



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 purple 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 “www.adobe.com/downloads” and press enter.
3. On the right hand side, under Downloads, Click **Adobe Reader**.
4. Uncheck any Optional Offers and click **Install now**.
5. Click **Run**
6. Click **Next**
7. Once finished click **Finish**

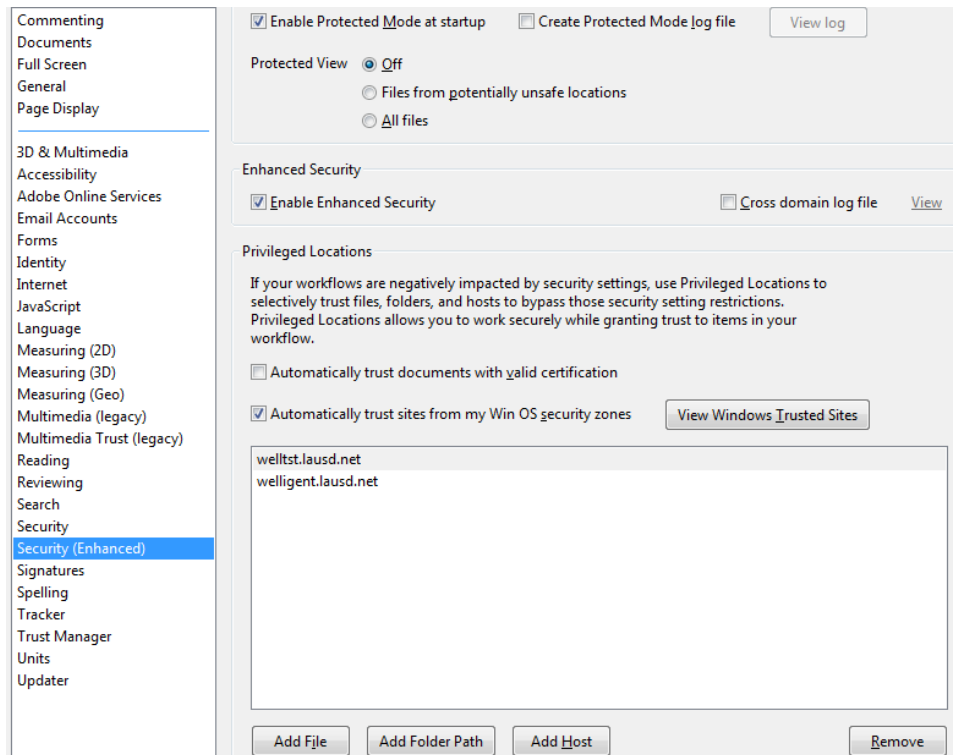
Welligent Technical Requirements: PDF Forms

Attachment A

Adobe Reader Settings for Internet Explorer users

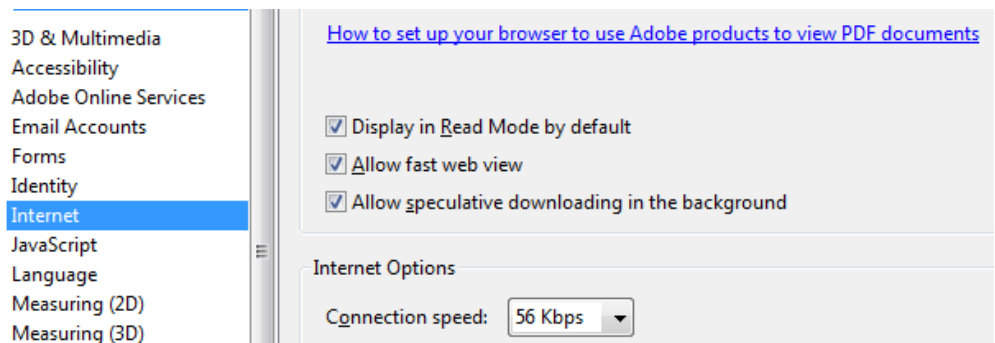
“Add Host To Privileged Locations” can be verified in Adobe Reader.

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.



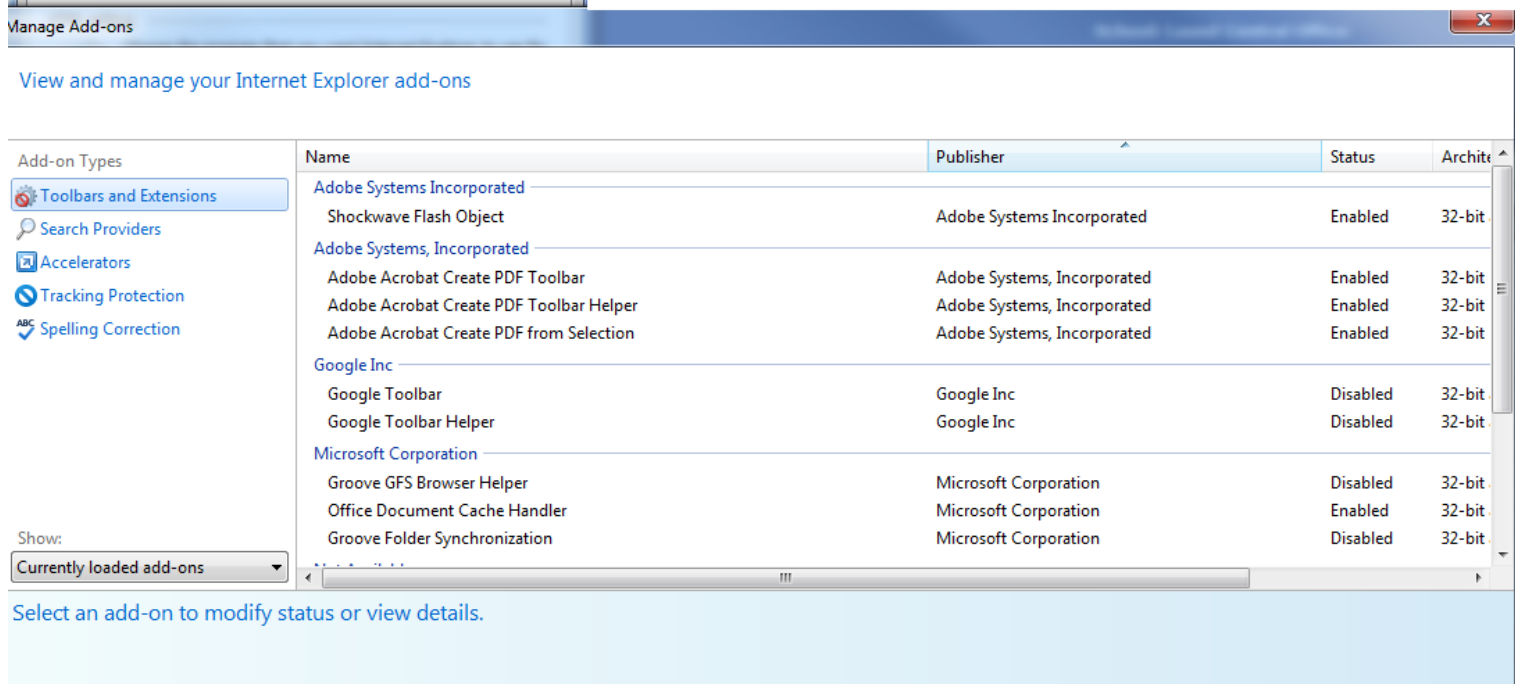
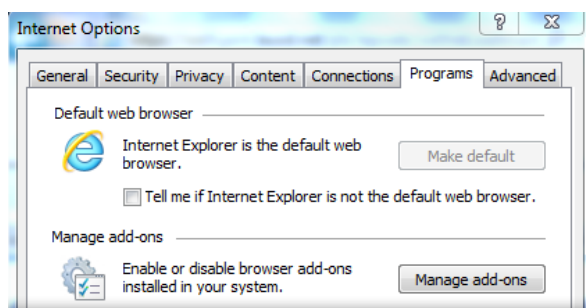
Welligent Technical Requirements: PDF Forms

Attachment A

Enable Adobe PDF Plug-ins in Internet Explorer

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



Welligent Technical Requirements: PDF Forms

Attachment A

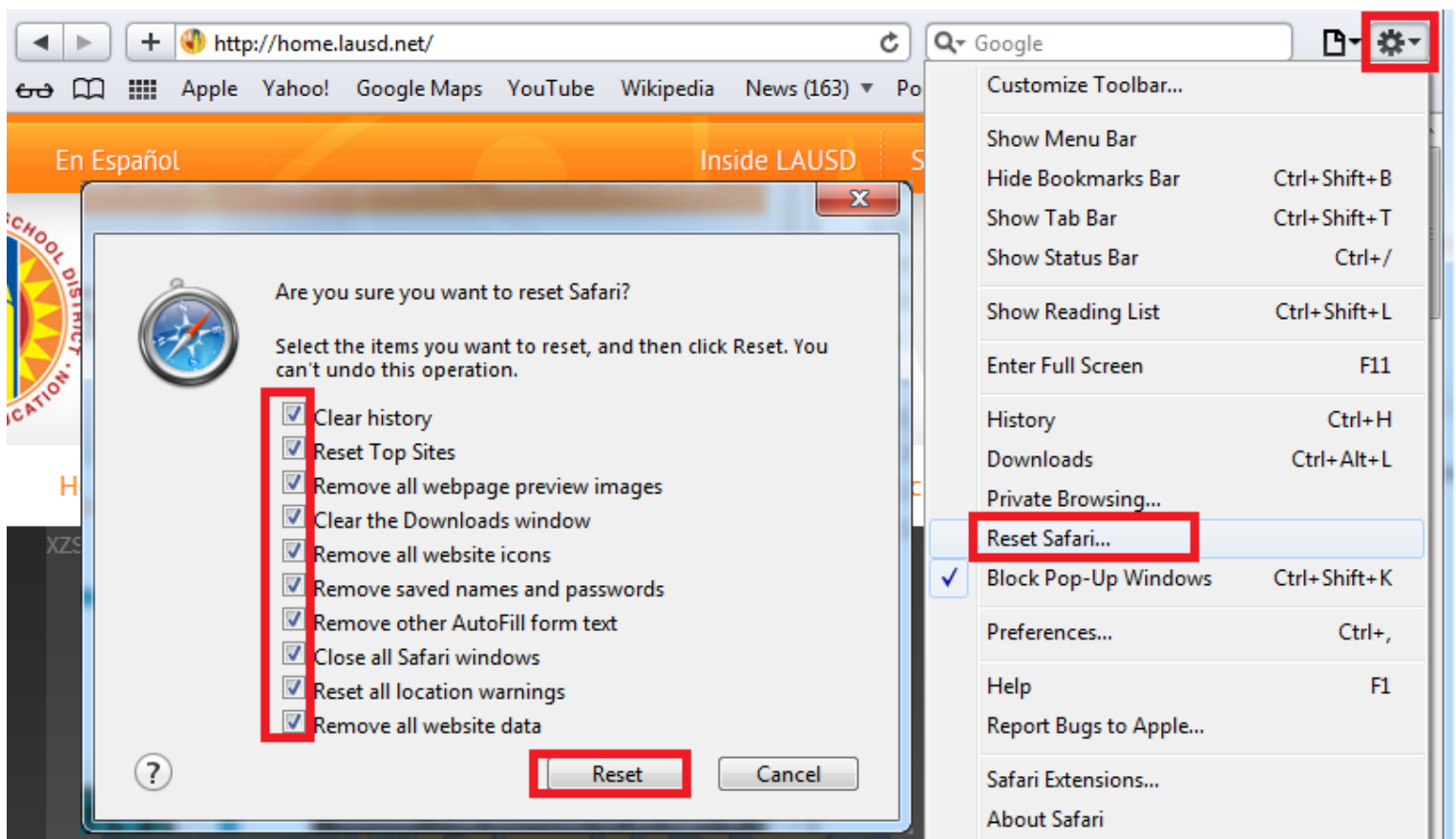
For Safari users (version 7 and below), Reset Safari Settings

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**



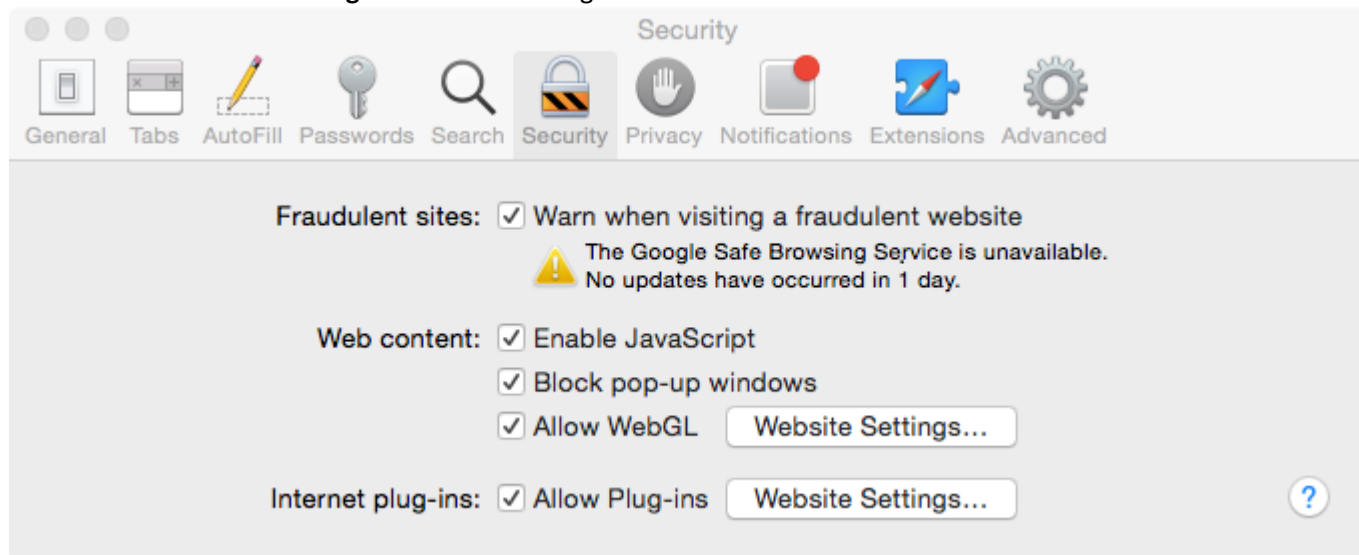
Welligent Technical Requirements: PDF Forms

Attachment A

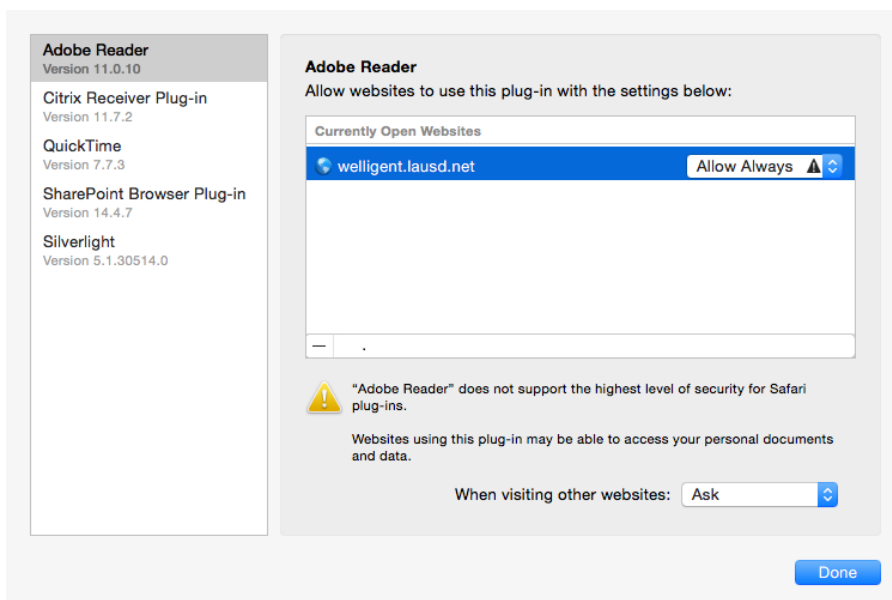
For Safari users (version 8 and above), adjust Safari Settings

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**



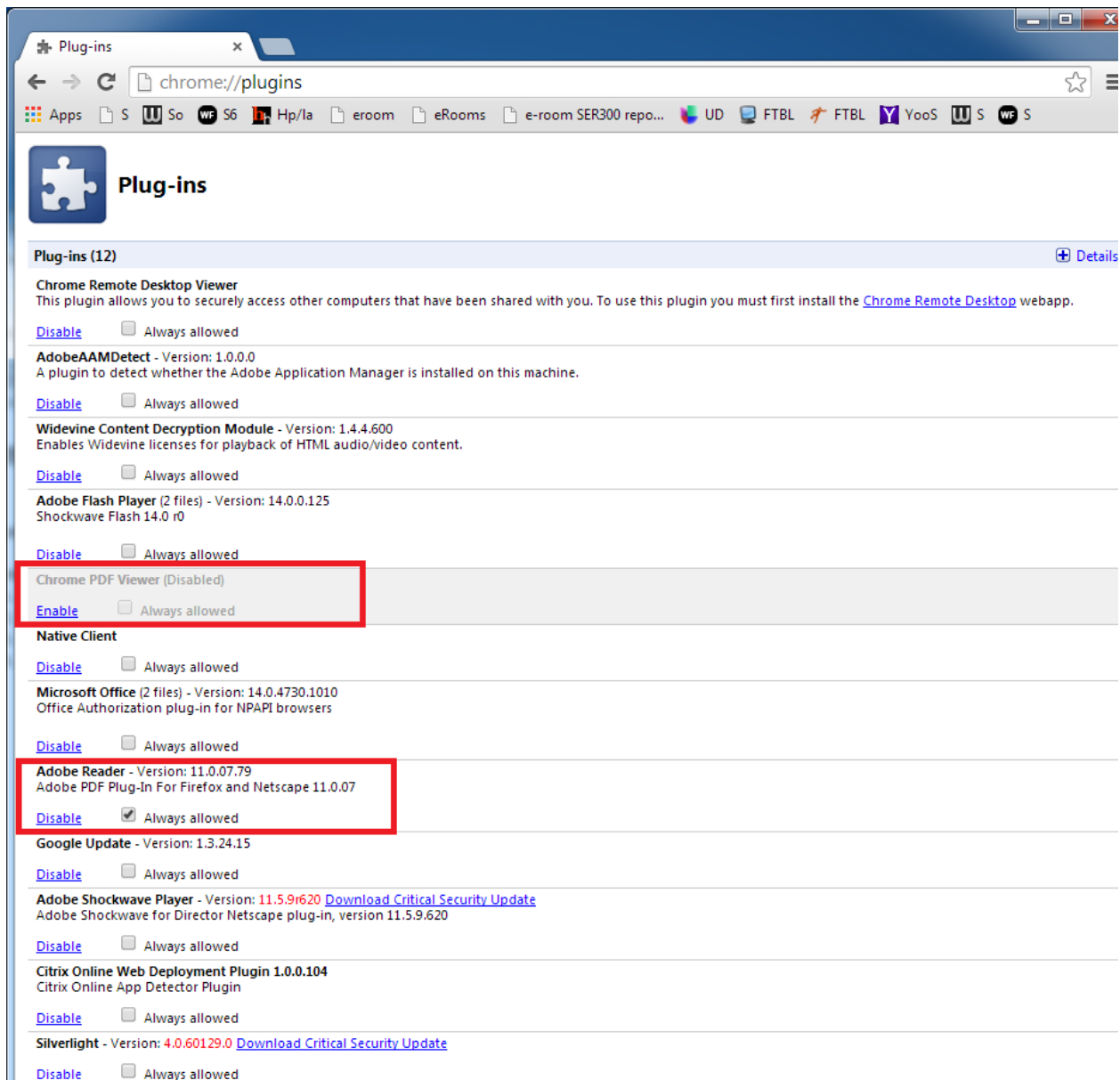
Welligent Technical Requirements: PDF Forms

Attachment A

Chrome Plugins

Enable/Disable Plugins

1. Open Chrome
2. In the address bar type "chrome://plugins/" and press enter
3. Enable "Adobe Reader" plugin
4. Disable "Chrome PDF Viewer" plugin.



Welligent Section 504 Program Module Quick Sheet

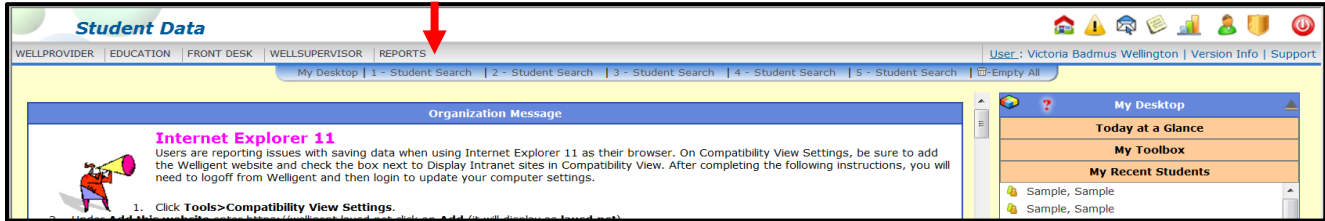
Attachment B

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

1a.



- b. Enter Student* ID # in the "Client ID" field
- If Student ID is unknown, enter
 1. "Last Name"
 2. "First Name"
 3. Date of Birth in the "DOB" field
 4. School of attendance in "Location" field
- c. Click the "Search" button at the top right hand side of the screen

1c.

1b.

A screenshot of the 'Student Search - Record Viewer 1' form. The form contains several input fields for search criteria: 'Last Name', 'First Name', 'Client ID', 'Location' (a dropdown menu), 'SSN', 'Alt ID', 'DOB', 'Status' (a dropdown menu), 'Location Grouping', 'Global Search' (a checkbox), 'Type of Record', 'Other Name/AKA', 'Grade', and 'Gender'. A red arrow points to the 'Client ID' field, labeled '1b.'. Another red arrow points to the 'Search' button in the top right corner, labeled '1c.'. Below the form fields is a table with columns: 'Edit', 'Info', 'Alert', 'Student', 'DOB', 'ID', 'Grade', 'Location', and 'Status'. A message at the bottom states: 'NO SEARCH CRITERIA ENTERED: You must enter at least one search criteria (in addition to Location) to search for a student.'

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

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

A screenshot of the 'Student Record Viewer' for a student named 'Sample Sample' (Client ID: LOS FELIZ1). The student's date of birth is '01-Aug-1999 (14 yrs 5 mths)' and their grade is '09th'. The 'Record Navigator' on the left has 'Program History' selected and circled in red. The main area shows 'Reminders' and a 'Schedule for Jan 17, 2014'. The schedule table lists appointments with columns for Time, Provider, Description, and Status.

Time	Provider	Description	Status
01:00am	Armen Balayan	DMM: Children's Hospital LA	Pending Completion
07:00am	Sevag Derderian	DMM: Children's Hospital LA	Pending Completion
08:00am	Apolonia Tolentino	DMM: Gastrostomy Feeding: Bolus Method	Pending Completion
08:30am	Kezia Miller	SMH School Based	Pending Completion

Welligent Section 504 Program Module Quick Sheet

Attachment B

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

2. LOCATING THE SECTION 504 STUDENT RECORD

a. Select "Program History" in the Record Navigator

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

a. Click "New"

b. Select "Enroll"

c. Click "Save"

3b.

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."

5d. {

5e. {

5f. **Save Form**

- 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

Student: Sample 1 Sample6 (Client ID: W1709662)
Date of Birth: 21-Jan-1994(21 yrs 2 mths)
Grade: 10th
School: New Village Cht Sh
Home Phone: 213-84-5155

Record Navigator: Student Information, Alerts, Assessments, Case Management, Case Notes, Consents, IEP Event Listing, Program History, Services

Program Status: Active

Section 504 Details: Initial Referral Date, Case Manager: Victoria Badmus Wellington, 504 Program Status

Paperwork/Forms: New Form, Refresh, New Form

Date	Signed?	Approved?	Copy/Revision?
03-Apr-2015	No	NA	Add
I. Management: 1-Evaluation Request 2-Parent Rights 3-Denial(1)			
I. Evaluation: 4-Parent Input Form(0)			
I. Evaluation: 5-Teacher Observation 6-Meeting Notice(0)			

- c. Click "OK" when the following message appears

If you continue a Copy/Revision WILL be created. Click OK to continue or Cancel to not create a Copy/Revision.

OK Cancel

- d. Type the updated information on the form and click "Save Form"
- e. Click "OK" when the confirmation message appears
- f. Click "Close"

6f.

6d. 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: **Designee's Name** at (Ph) **1234567890** or you may call the District's Educational Equity Compliance Office at (213) 241-7682.

Student ID: 012345m001	Date: 04/03/15
Last Name: Sample	First Name: Sample
School: Los Angeles Unified School	Educational Service Center
Student's Primary Language	English Language Development Level
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)
This is a re-evaluation to review student's eligibility....

Attachment B

Student: Sample 1 Sample6 (Client ID: W1709662)

Date of Birth: 21-Jan-1994(21 yrs 2 mths)

Grade: 10th

School: New Village Cht Sh

Home Phone: 213-84-5155

Record Navigator
Program Episode Details - Section 504
Other » Save

Student Information

Alerts

Assessments

Case Management

Case Notes

Consents

IEP Event Listing

Program History

Services

Program Status: Active

504

ALWAYS SAVE YOUR WORK BEFORE CLOSING 504

Section 504 Details

Initial Referral Date: Time:

Case Manager:

504 Program Status

Status:

Paperwork/Forms

New Form Next Date

Date	Signed?	Approved?	Copy/Revision?
03-Apr-2015	No	NA	Add
03-Apr-2015	No	NA	Yes; Add

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

SK | WELLSUPERVISOR | REPORTS | My Desktop | ID1 ~ Yebisu, Elijah O | ID2 ~ Sample, Sample | ID3 ~ Silva, Julie | 4 ~ Student Search | 5 ~ Student Search | ID ~ Empty All

User: Victoria Badmus Wellington | Version Info

School: Lausd Central Office
 Home Phone:

Program Status: Active * ALWAYS SAVE YOUR WORK BEFORE CLOSING 504

Section 504 Details

Initial Referral Date:	28-Aug-2012	Time: 12:00am
Case Manager:	Victoria Badmus Wellin	
504 Program Status:	Eligible - No 504 Plan	
I. 504 Management		
Referring Individual:	Sarah Sample	
Relationship to Student:	Parent	
II. 504 Evaluation		
Meeting/Plan Date:	25-JUN-2014	
Meeting Type:	Re-Evaluation	
3 Year Re-Evaluation Due:	25-JUN-2017	

Paperwork/Forms

- Case Notes
- IEP Forms
- Attachments

	Next Date
+ I. Management-English/Spanish: 1-Request 2-Rights 3-Denial(8)	--
+ II. Evaluation-English/Spanish: 4-Parent 5-Teacher Obs. 6-Meet'g Notice(4)	--
+ IIIa. Meeting-English/Spanish: 7-Evaluation 9-Eligibility Det.(0)	--
+ IIIb. Meeting-English/Spanish: 8-504 Plan(5)	--
+ IV. Follow Up-English/Spanish: 10-Complaint 11-Revocation(0)	--
+ I. Management-Spanish: 1-Request 2-Rights 3-Denial(0)	--
+ II. Evaluation-Spanish: 4-Parent 5-Teacher Obs. 6-Meet'g Notice(0)	--
+ IIIa. Meeting-Spanish: 7-Evaluation 9-Eligibility Det.(0)	--
+ IIIb. Meeting-Spanish: 8-504 Plan(0)	--
+ IV. Follow Up-Spanish: 10-Complaint 11-Revocation(0)	--
+ IIIa. Meeting-English/Spanish: 7-Evaluation 9-Eligibility Det.(1)	--
+ IV. Follow Up-English/Spanish: 10-Complaint 11-Revocation(1)	--

Welligent Section 504 Program Module Quick Sheet

Attachment B

- b. Any attached documents will appear in the Attachments window
- c. Attach required documents by clicking the "New Attach" button

The screenshot shows the 'Student Data' interface. The top navigation bar includes 'WELLPROVIDER', 'EDUCATION', 'FRONT DESK', 'WELLSUPERVISOR', and 'REPORTS'. The user is logged in as 'Victoria Badmus Wellington'. The main content area displays 'Student: Sample Sample (Client ID: LOS FELIZ1)' and 'School: Lausd Central Office'. The 'Record Navigator' on the left lists various options, with 'Program History' selected. The 'Section 504 Details' window shows fields for 'Initial Referral Date', 'Case Manager', '504 Program Status', and 'Referring Individual'. The 'Attachments' window on the right lists existing attachments, and the 'New Attach' button is circled in red.

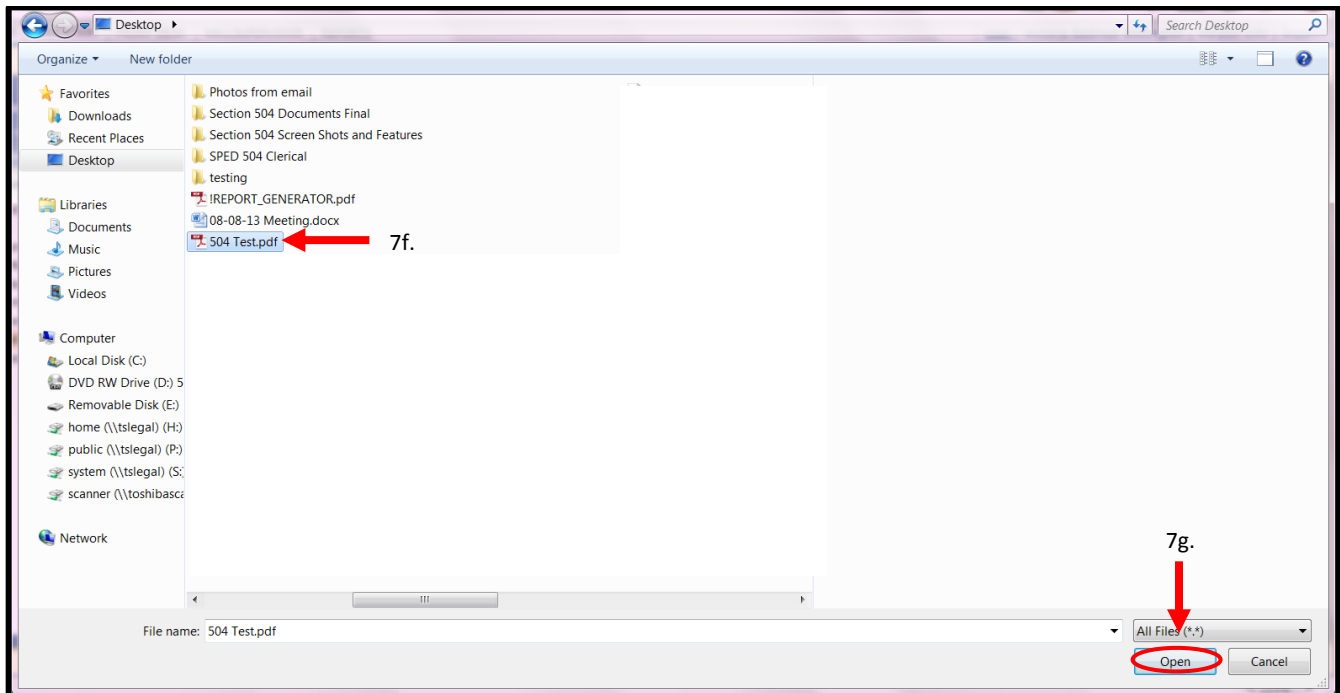
- d. When the Welligent Upload window appears, enter a brief description of document that will be uploaded, i.e. "504 Plan 2/14/2014," "Parent Input form 2/12/2014," etc...
- e. Click "Browse" button to locate the file to be uploaded

The screenshot shows the 'Welligent Document Upload' window. The 'Document Management' section contains fields for 'Student', 'Student ID', 'Student DOB', 'Student Program', 'File Name', 'File Type', 'Document Size (KB)', 'Date Uploaded', 'Uploaded By', 'Upload File', 'Brief Description', 'Confidentiality Status', and 'Keywords'. The 'Browse...' button next to the 'Upload File' field is circled in red. The 'Brief Description' field contains the text '504 Phase I, II, III, IV'.

Welligent Section 504 Program Module Quick Sheet

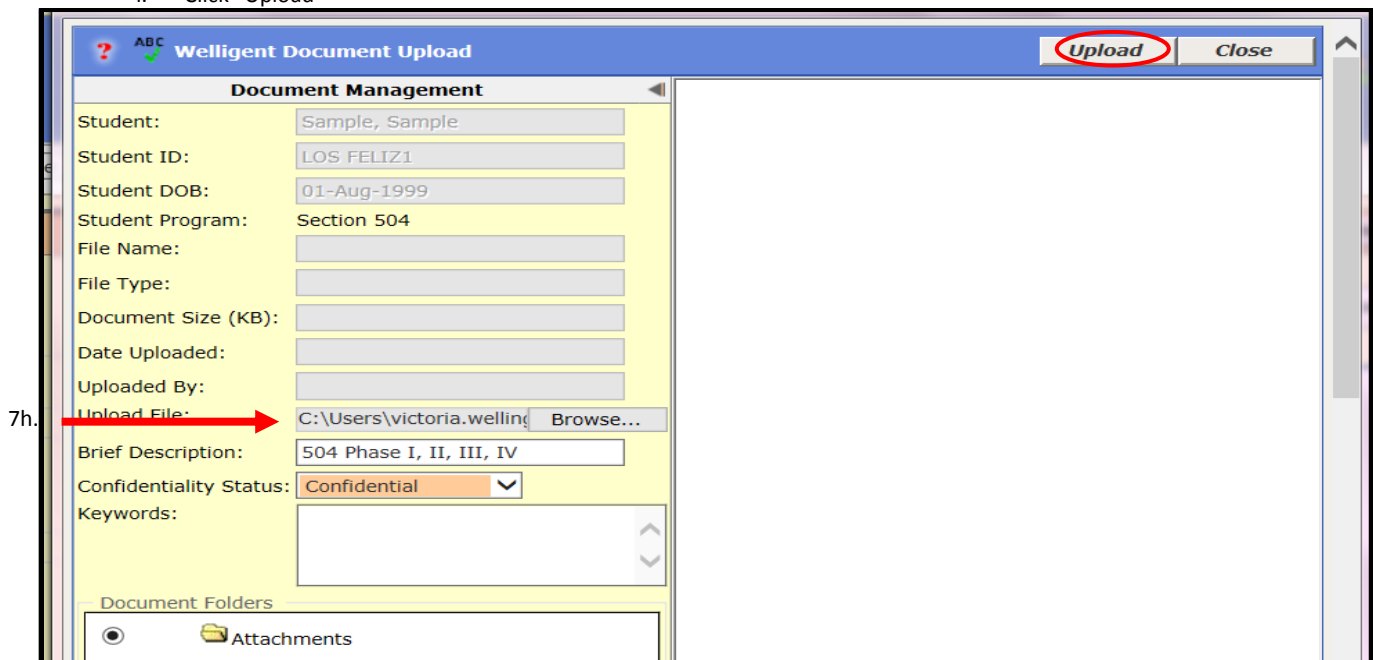
Attachment B

- 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"

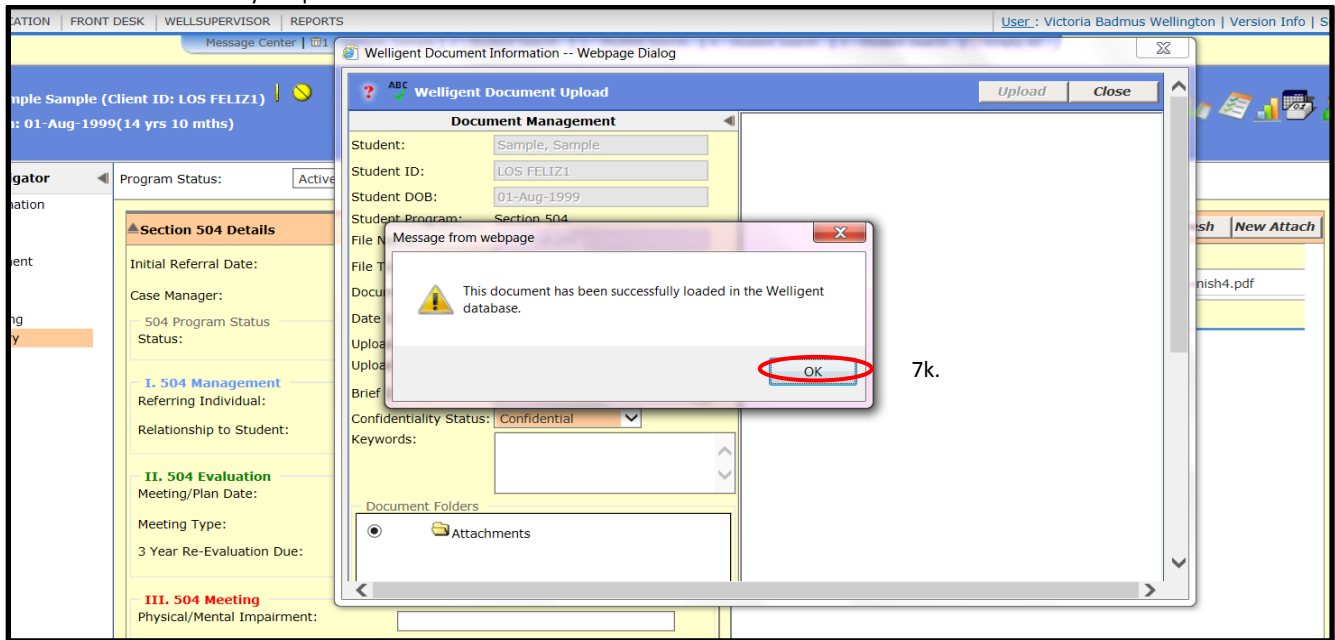
7i.



Welligent Section 504 Program Module Quick Sheet

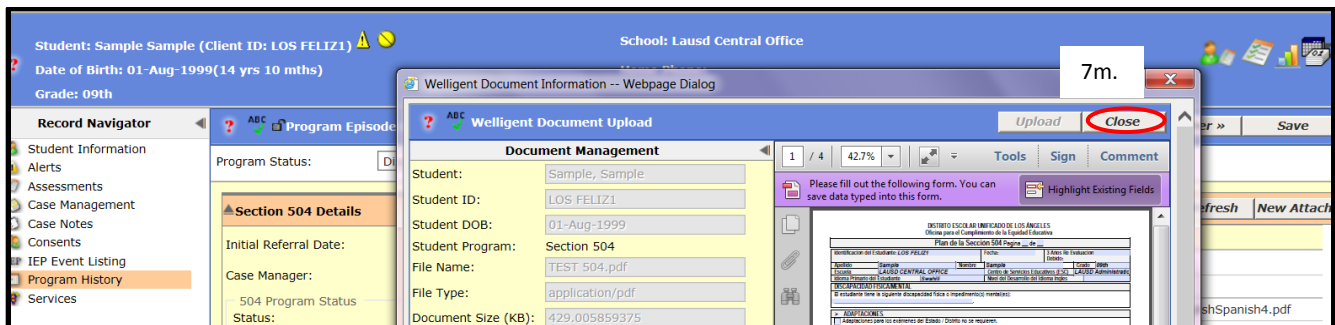
Attachment B

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



7k.

- l. After clicking "Okay" the attached document should appear
- m. Click "Close" to close the window



7m.

Welligent Section 504 Program Module Quick Sheet

Attachment B

II. ADDITIONAL FEATURES

8. RECEIVING SYSTEM ALERTS

- Upon the enrollment of a student with an "Eligible" or "Pending" Section 504 status, the administrator(s) will receive the automated message below:

Message Details

From: Welligent Automated Messenger
 To: Armen B
 Email Sent: No
 Message Priority: **HIGH**
 Subject: 504 Student Enrollment:LAUSD R
 Student: Sample, Sample (View Face Sheet)
 Date Sent: Wednesday October 23, 2013 At 01:16AM
 Date Read: Not Opened

The following student (SAMPLE, SAMPLE District IDLAUSD R) has a Section 504 Plan. Upon enrollment in the new school distribute the Section 504 Plan to all responsible personnel and conduct a Section 504 Re-Evaluation within the first 30 days

9. VIEWING STUDENT FACE SHEET FOR SECTION 504 STATUS

- In the Record Navigator, select "Student Information" to access the Student Face Sheet

Student: Sample Sample (Client ID: LOS FELIZ1)
 Date of Birth: 01-Aug-1999(14 yrs 5 mths)
 Grade: 09th

School: LaUSD Central Office
 Home Phone:

Record Navigator

- Student Information
- Alerts
- Assessments
- Case Management
- Case Notes
- Consents
- IEP Event Listing
- Program History
- Services

Student Face Sheet

STUDENT INFORMATION

Client ID	LOS FELIZ1	Welligent ID:	1555855
Alt ID:		SS #:	
Last Name:	SAMPLE	First Name and Middle Initial:	SAMPLE
Gender:		Race/Ethnicity:	/
Date of Birth:	01-Aug-1999	Primary Case Manager:	ADMIN1 ADMIN
Home Address:			
Jurisdiction Division:		Work Phone:	
Home Phone:		Fax:	
Cellular Phone:		Primary Language / Language Spoken in Home	Swahili/
Email:		School of Residence:	
Current Grade:	09th		
Section 504:	Pending		

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: Sample Sample (Client ID: LOS FELIZ1)
 Date of Birth: 01-Aug-1999(14 yrs 5 mths)
 Grade: 09th

School: LaUSD Central Office
 Home Phone:

Record Navigator

- Student Information
- Alerts
- Assessments
- Case Management
- Case Notes
- Consents
- IEP Event Listing
- Program History
- Services

Program Episode Details - Section 504

Program Status: Pending

Section 504 Details

Initial Referral Date: 28-Aug-2012 Time: 12:00am
 Case Manager: Victoria Badmus Wellin

10a.

10b.

REF-6241.2

Office of General Counsel

April 8, 2015

Welligent Section 504 Program Module Quick Sheet

Attachment B

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

- d. Click "Delete"

- e. To delete the form click "OK"

10d.

- 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

10h.

Welligent Section 504 Program Module Quick Sheet

Attachment B

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

The screenshot shows the 'Section 504 Details' form in the Welligent interface. The 'Program Status' is 'Pending'. The 'Initial Referral Date' is '28-Aug-2012'. The 'Case Manager' is 'Victoria Badmus Wellington'. The '504 Program Status' is 'Pending'. In the 'Paperwork/Forms' section, there is a table with columns: Date, Signed?, Approved?, and Revision?. The first row shows '19-DEC-2013', 'No', 'NA', and 'Add'. A red arrow points to the 'Add' link.

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

The screenshot shows the 'E-Forms Editor' interface. The '2-Review and Approval' menu option is circled in red. The form title is 'SECTION 504 EVALUATION'. The 'Student ID' is 'LOS FELIZ1' and the 'Date' is '12/19/2013'.

- c. Select "E-Signature"
d. Signature Title is optional

11c.

The screenshot shows the 'Supervisor Review and Approval Process' section. The 'Document Details' table includes fields like 'Document Owner', 'Document Status', 'Date Created', 'Date Last Updated', 'Date Signed', 'Supervisor/Reviewer Assigned', 'Date Submitted to Supervisor', 'Supervisor Approval Status', and 'Supervisor Approval Date'. The 'Signature Type' section has radio buttons for 'E-Signature' and 'Digital Signature'. The 'Signature' section has a table with columns: Logged in As, Signature Title, User Account, Password, and Notes. A red arrow points to the 'E-Signature' option, and another red arrow points to the 'Signature Title' field.

Welligent Section 504 Program Module Quick Sheet

Attachment B

- e. Enter your single sign-on password
- f. Click "Verify/Sign" button

11e.

11f.

- g. After locking the form a confirmation message should appear so click "OK."

OK

12. GENERATING A SECTION 504 REPORT

- a. Select "Section 504 Reports" in the drop down menu under "Reports."

Welligent Section 504 Program Module Quick Sheet

Attachment B

- b. Select the desired Section 504 Report from the list by clicking the icon to the left of the report.

Student Data

WELLPROVIDER | EDUCATION | FRONT DESK | WELLSUPERVISOR | REPORTS

User: Victoria Badmus Wellington | Version Info | Support

Section 504 Reports(Custom Grouping) | 1 - Pineda, Luis D | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | Empty All

Stock Reports

Search Criteria

Report Category: Section 504 Reports(Custom Grouping) ▼

Keyword:

Report ID:

Find Dashboards: ☐

Select	Report Name	Report Description	Report ID	Category
	Section 504 Evaluation Report		2405	--
	Section 504 Exit Details Report		2408	--
	Section 504 Follow Up Report		2407	--
	Section 504 Management Report		2357	--
	Section 504 Meeting Report		2406	--
	Section 504 Report		2409	--
	Section 504 Report by Section 504 Status Count	This report will NOT capture students who have a Section 504 Program but do NOT have a Section 504 Program Status.	2410	--

- c. Select the school or District location as appropriate from the drop down menu by clicking the arrow and locating it. 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.

Student Data

WELLPROVIDER | EDUCATION | FRONT DESK | WELLSUPERVISOR | REPORTS

User: Victoria Badmus Wellington | Version Info | Support

Section 504 Reports(Custom Grouping) | 1 - Pineda, Luis D | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | Empty All

Section 504 Report(2409)

Schedule Run Excel (+) Hot List Reset Close

Report Engine: Print Listing

Filter	Value
School	All Locations ▼
District	All Districts ▼
Section 504 Status	▼

- d. After selecting the school or District location, click "Run."

Student Data

WELLPROVIDER | EDUCATION | FRONT DESK | WELLSUPERVISOR | REPORTS

User: Victoria Badmus Wellington | Version Info | Support

Section 504 Reports(Custom Grouping) | 1 - Pineda, Luis D | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | Empty All

Section 504 Report(2409)

Schedule **Run** Excel (+) Hot List Reset Close

Report Engine: Print Listing

Filter	Value
School	107TH ST EL ▼
District	All Districts ▼
Section 504 Status	▼