

Section 504 in goIDEA: A Step-By-Step Guide

Madison Metropolitan School District



Revised August 2025

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I. What is Section 504?

[Section 504 of the Rehabilitation Act of 1973](#) is federal legislation involving the civil rights of persons with disabilities that prohibits discrimination or exclusion on the basis of disability alone and provides students with disabilities equal access to general education programs and services. Section 504 impacts all programs and activities that receive federal funding.

For a student to have a disability which may be protected under this law, they must:

- Have a physical or mental impairment which substantially limits one or more major life activities. Students who have a history of, or who are regarded as having a physical or mental impairment that substantially limits one or more major life activities, are also covered.

The 504 plan includes the accommodations needed to ensure equal access and provide FAPE (Free Appropriate Public Education). An accommodation can generally be thought of as any change in the environment or the way things are customarily done that enables a student with a disability to have the benefit of equal opportunities.

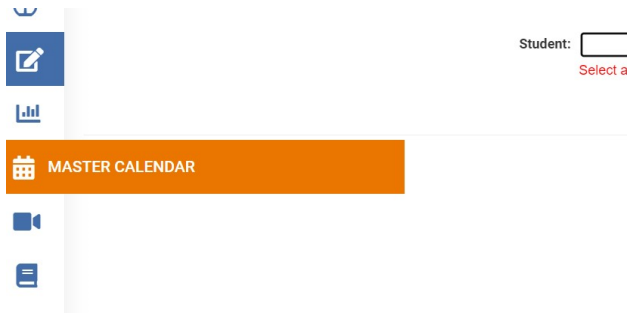
Child Find Information from DPI Website:

School districts must identify, locate, and evaluate all resident students with disabilities who are in need of special education and related services. This responsibility is often referred to as “child find.” The child find obligation extends to students attending district schools through the state’s public school open enrollment program. The child find obligation is an affirmative one. School districts may not take a passive approach and wait for others, including parents, to refer students potentially eligible to receive special education for evaluation. Each district must establish written procedures for accepting and processing referrals and provide information and in-service opportunities to its entire licensed staff to familiarize them with the district’s referral procedures. Referrals must be in writing, include the name of the student, and the reasons why the person believes that the student is a child with a disability. Any person, including the parent, who reasonably believes that a student is a child with a disability may refer the student to a local educational agency for evaluation. Under Wisconsin law, any time a district receives a referral, it must proceed with an evaluation without delay. While parents may choose to share information obtained through medical and other outside providers with school staff, districts may not delay or condition proceeding with a referral and evaluation on receiving that information.

II. Accessing the Master Calendar & Updating Case Managers in goIDEA

You can access your school's 504 master calendar and update 504 case managers by:

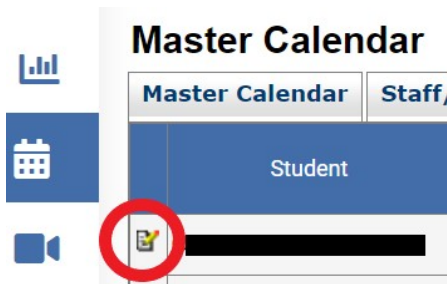
1. Log on to goIDEA
2. Click the master calendar icon on the left



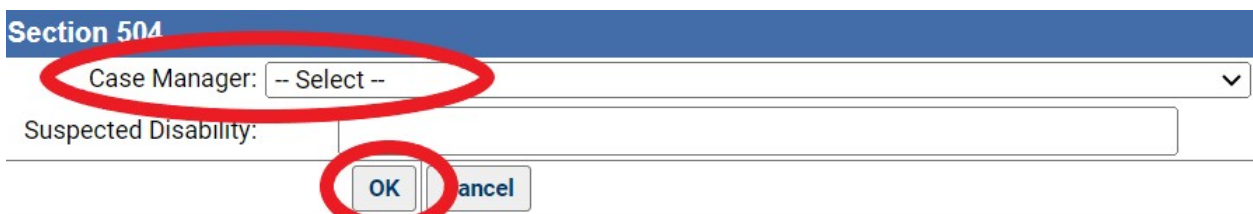
3. Select your school and click the Section 504 Enrollments tab



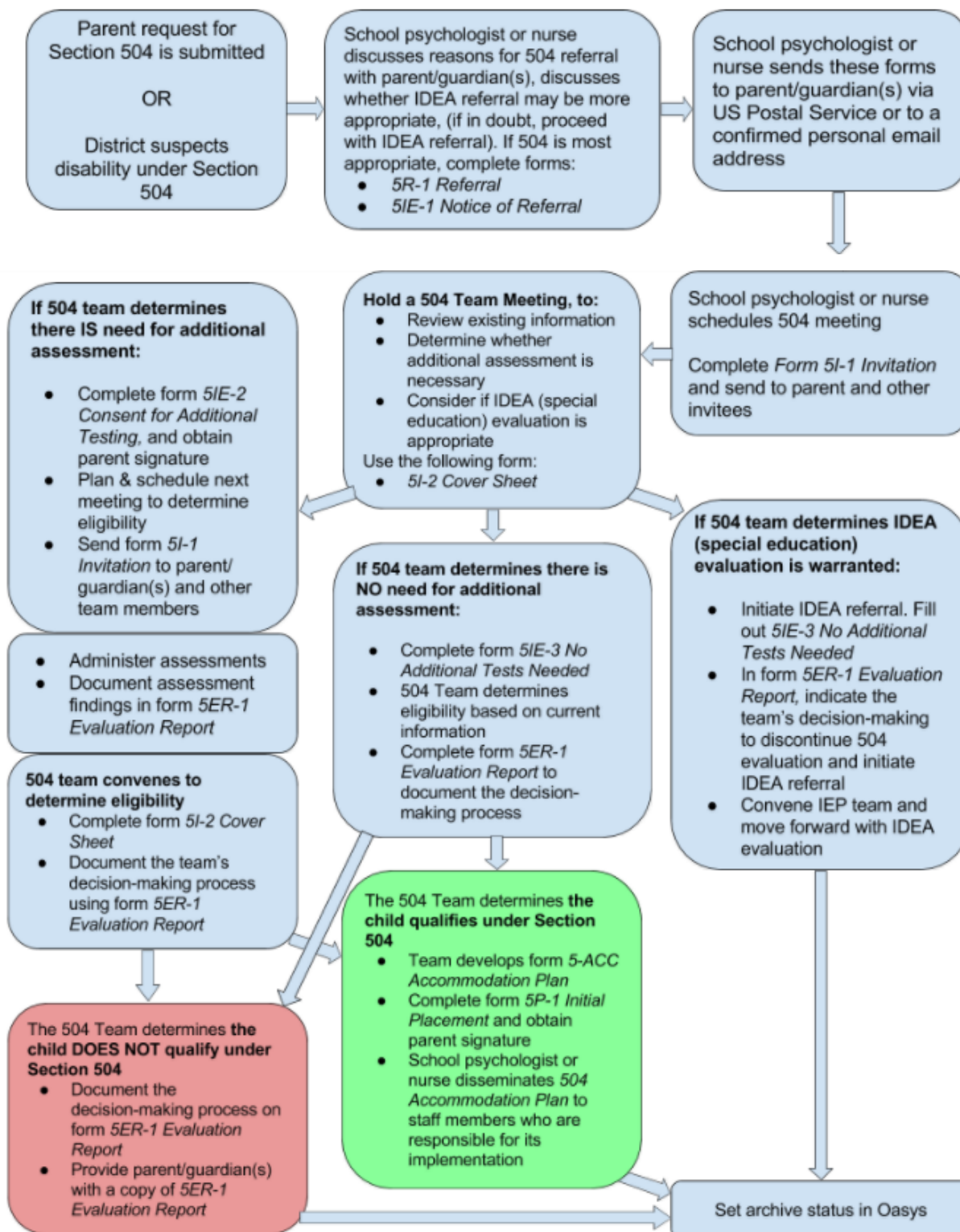
4. Click the edit button to the left of the student's name



5. Select the case manager and click OK



MMSD - SECTION 504 INITIAL EVALUATION FLOWCHART



[Link to flowchart with larger text format](#)

IV. Required Documents for an Initial/Reevaluation

***IMPORTANT TO SHARE THE FOLLOWING WITH THE PARENT/GUARDIAN EARLY IN THE PROCESS (ATTACH TO EMAIL WHEN SENDING 504 INVITE):

 Section_504_Brochure_English_April_2024 (3).pdf

 Section_504_Brochure_Spanish_April_2024 (3).pdf

For other translation needs, please see page 25 of this guide.

1. **(5R-1)** Sec 504 Referral
2. **(5IE-1)** Sec 504 Notice of Referral
3. *One of the following:*
 - a. **(5IE-2)** Sec 504 Consent for Additional Testing **OR**
 - b. **(5IE-3)** Sec 504 No Additional Tests Needed
4. **(5ER-1)** Sec 504 Evaluation Report
5. **(5I-2)** Sec 504 Cover Sheet
6. **(5I-1)** Sec 504 Invitation
7. **(5-ACC)** Sec 504 Accommodation Plan (if eligible)
8. **(I-7)** Sec 504 Assessment Forms
 - a. For High School Students:
 - i. I-7DW District Assessments - FAST, ANet, Civics, (KG-12)
 - ii. I-7PA Statewide Assessments PreACT Secure (9&10)
 - iii. I-7FW Statewide Assessments - Forward (Gr 3-8, 10)
 - iv. I-7WW Statewide Assessments ACT Writing (Gr. 11)
 - v. *For English Language Learners also include:
I-7ELL Statewide Assessments - ACCESS (K-12, ELL)
 - b. For Middle School Students:
 - i. I-7DW District Assessments - FAST, ANet, Civics, (KG-12)
 - ii. I-7FW Statewide Assessments - Forward (Gr 3-8, 10)
 - iii. *For English Language Learners also include:
I-7ELL Statewide Assessments - ACCESS (K-12, ELL)
 - c. For Elementary School Students:
 - i. I-7DW District Assessments - FAST, ANet, Civics, (KG-12)
 - ii. I-7FW Statewide Assessments - Forward (Gr 3-8, 10)
 - iii. *For English Language Learners also include:
I-7ELL Statewide Assessments - ACCESS (K-12, ELL)
9. *One of the following:*
 - a. **(5P-1)** Sec 504 Initial Placement (if eligible) **OR** - also for transfers
 - b. **(5P-2)** Sec 504 Continuing Placement (if eligible)

V. Required Documents for an Annual Review

***IMPORTANT TO SHARE THE FOLLOWING WITH THE PARENT/GUARDIAN EARLY IN THE PROCESS (ATTACH TO EMAIL WHEN SENDING 504 INVITE):

 Section_504_Brochure_English_April_2024 (3).pdf

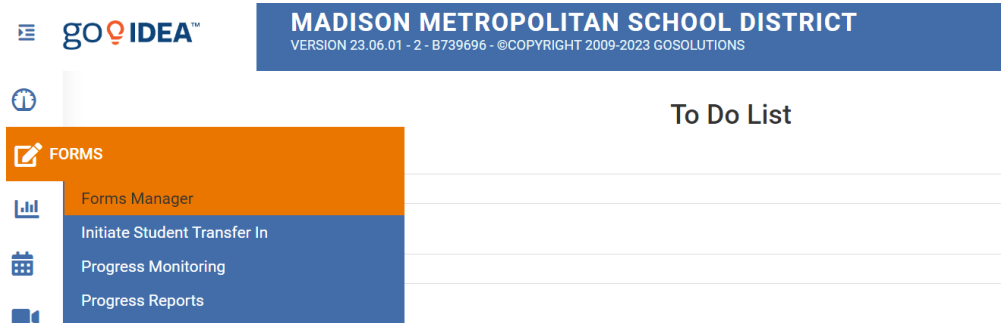
 Section_504_Brochure_Spanish_April_2024 (3).pdf

For other translation needs, please see page 25 of this guide.

1. **(5I-2)** Sec 504 Cover Sheet
2. **(5I-1)** Sec 504 Invitation
3. **(5-ACC)** Sec 504 Accommodation Plan
4. **(5P-2)** Sec 504 Continuing Placement
5. **(I-7)** Sec 504 Assessment Forms
 - a. For High School Students:
 - i. I-7DW District Assessments - FAST, ANet, Civics, (KG-12)
 - ii. I-7PA Statewide Assessments PreACT Secure (9&10)
 - iii. I-7FW Statewide Assessments - Forward (Gr 3-8, 10)
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 - c. For Elementary School Students:
 - i. I-7DW District Assessments - FAST, ANet, Civics, (KG-12)
 - ii. I-7FW Statewide Assessments - Forward (Gr 3-8, 10)
 - iii. *For English Language Learners also include:
I-7ELL Statewide Assessments - ACCESS (K-12, ELL)

VI. Where to Locate 504 Documents in goIDEA

STEP 1: Click *Forms Manager*



STEP 2: Search for the student by entering student's name or ID#

Student: or

Select a Student

STEP 3: Click the *New Forms* tab

- Under the dropdown menu, change "All" to "504"
- Choose the forms you will need, depending on whether it is an Initial/Reevaluation or Annual 504

Envelopes

Existing Forms Archived Forms **New Forms** Smart Forms

504 ENGLISH ☐ Erase IEP Team ☐ Blank Form

District	Form No.	Description
3269	5R-1	Sec 504 Referral
0	5IE-1	Sec 504 Notice of Referral
0	5IE-2	Sec 504 Consent for Additional Testing
0	5IE-3	Sec 504 No additional tests needed
0	5I-1	Sec 504 Invitation
3269	5I-2	Sec 504 Cover Sheet
0	5ER-1	Sec 504 Evaluation Report
3269	5OTPT	Sec 504 OT PT Evaluation Report
3269	5-ACC	Sec 504 Accommodation Plan
0	5I-12	Sec 504 Manifestation Determination
0	5P-1	Sec 504 Initial Placement
0	5P-2	Sec 504 Continuing Placement
3269	5-OT	Sec 504 OT Treatment Plan
3269	5-PT	Sec 504 PT Treatment Plan
3269	5-TSC	Sec 504 Transfer Student Checklist
3269	5-DISP	Sec 504 Disposition Report

VII. Completing a 504 Referral

5R-1 (Sec 504 Referral) Form

Fill out the Referral Form

- **Indicate date of parent notice, person making referral, primary language, etc.**
- **Indicate the nature of the concern:**
 - Note any specific diagnosis (or diagnoses)
 - Cite the person who made the referral
 - Purpose or rationale for making the referral
 - Other pertinent information to describe why the referral is being submitted
- **Explain how the suspected impairment may substantially limit a major life activity**
 - Be sure to indicate that the suspected impairment **MAY** limit [child's name]'s ability to...
 - Major life activities include, but are not limited to: thinking, concentrating, learning, breathing, walking, seeing, using the bathroom, etc.
- **Describe any relevant test data or physician's reports**
 - Summarize neuropsychological reports, diagnostic information or other relevant information (insufficient to just say "report on file" - please summarize).
 - Remember that this is not a requirement to establish a 504 plan.
- **Describe interventions and the effects of those interventions**
 - Collaborate with teacher(s) to identify the interventions tried and their effects
 - Examples might include: seat proximity to instruction, extra time on classroom tests, frequent redirection, individual checks for understanding, etc.
 - For **ANY** intervention listed, you **MUST** describe the effects. Did it work, or not?

5IE-1 (Sec 504 Notice of Referral) Form

Complete the *Notice of Referral (5IE-1)* form

- Indicate date form is sent to parent
- Indicate initial referral or re-evaluation
- Indicate yourself as the "District Contact" by typing last name and clicking *apple button*

Email the referral form, notice of referral and the 504 parent's guide. You may also include an *Invitation* if date/time has already been established with parent(s) and other team members.

VIII. Determining Need for Additional Assessment

First establish with the team: do we need additional assessments or not?

- Click “**Sec 504 Consent for Additional Testing (5IE-2)**”
OR
- If you do not need additional testing, click “**No Additional Tests Needed (5IE-3)**”

5IE-2 (Sec 504 Consent for Additional Testing) Form

Fill out the *Consent for Additional Testing Form*.

- Note that this form is ONLY used when additional testing is needed. See the “*No Additional Tests Needed*” form otherwise.
- Document the date
- Indicate initial evaluation (“determine whether child **is** a child with a disability”) or re-evaluation (“determine whether the child **continues to be** a child with a disability”)
- Record attempts to contact parents
- Proposed Tests: Identify which tests would be administered, and by whom.
- Obtain parent/guardian permission to conduct additional tests via signature on the *Consent for Additional Testing (5IE-2) form*. See page 26 of this guide for instructions on using Adobe Sign. Scan and email signed form to idearecords@madison.k12.wi.us (page 20).

IX. Invitation

5I-1 (Sec 504 Invitation) Form

Fill in each of the fields on the form, including:

- Date sent to parent
- Initial evaluation, re-evaluation, or annual review
- Select meeting purpose
- Date, time, and location
- Participants
- Indicate yourself as the “District Contact” by typing last name and clicking *apple* button

X. Cover Sheet

5I-2 (Sec 504 Cover Sheet) Form

Fill in each of the fields on the form, including:

- Meeting date
- Transfer information, if pertinent
- If developing an Accommodation Plan, indicate what information was reviewed
 - Initial or most recent evaluation
 - State-wide assessments
 - District-wide assessments
- Participants
- Parent participation information

XI. Evaluation Report

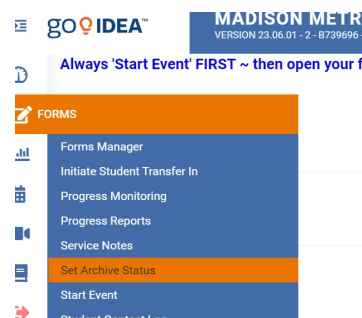
5ER-1 (Sec 504 Evaluation Report) Form

Fill in each of the fields on the form, including:

- Date form sent to parent
- Summary of Evaluation Findings
 - Summarize data that suggests the student has a physical or mental impairment. (Include a specific and detailed description and analysis)
 - Summarize data that suggests the impairment listed above substantially limits a major life activity. (Include a specific and detailed description and analysis)
- Determination of Section 504 Eligibility
 - Student has physical or mental impairment
 - Identify the impairment
 - The impairment substantially limits one or more major life activity
 - Identify the major life activity(ies)
 - The child is a child with a disability under section 504
- Indicate Participants

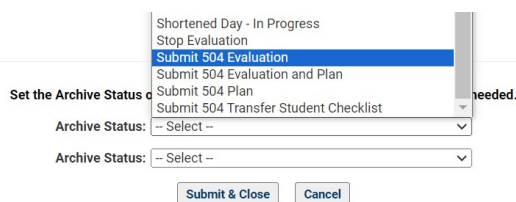
Set Archive Status

- Click the *Forms* tab on the left side of the screen
- Click *Set Archive Status*



- Click *Submit 504 Evaluation*
- Click *Submit & Close*

Set Archive Status



- Note: this process communicates your request for next steps to clerical staff at Central Office, for the selected student. See page 18 for detailed instructions on archiving.

XII. Accommodation Plan

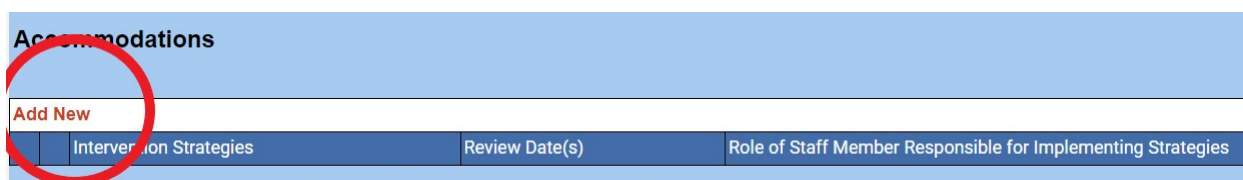
5-ACC (Sec 504 Accommodation Plan) Form

Indicate the student's disability, according to the most recent 504 Evaluation.

Indicate how the disability substantially limits major life activities, according to the most recent 504 Evaluation.

Add *Intervention Strategies* (Accommodations) to the 504 Plan

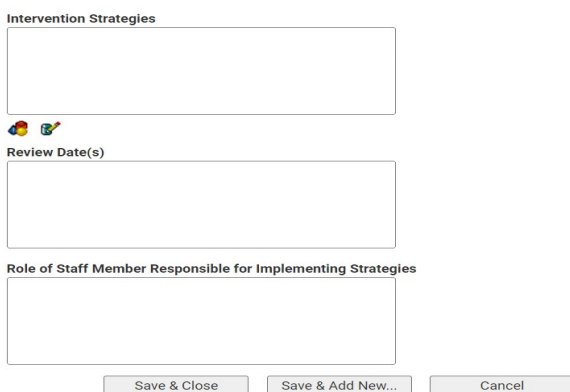
- Click *Add New*



Accommodations		
Intervention Strategies	Review Date(s)	Role of Staff Member Responsible for Implementing Strategies
Add New		

Fill in accommodation information

- **Intervention Strategies:** Describe the intervention strategies (accommodations) that the team determines are needed by the child, based on his or her disability.
- **Review Date(s):** indicate the date by which the 504 Team will review the effectiveness and appropriateness of the intervention strategy (e.g. one year minus one day (364 days) after the start date of accommodation plan)
- **Person(s) Responsible:** Indicate who will implement the intervention. This typically includes classroom teachers, student services staff, nurses, and/or other school staff. Make sure to indicate the role of the staff member, not a specific person's name. These accommodations are for the school setting, so parents/guardians should not be listed as responsible for implementing these strategies.
- Click "Save & Add New" to create additional accommodations
- Repeat all items in Step 7 for each accommodation
- Click "Save & Close" when finishing the last accommodation



Intervention Strategies

Review Date(s)

Role of Staff Member Responsible for Implementing Strategies

Save & Close Save & Add New... Cancel

Indicate if any related services are included in the students plan:

Please select which services the student will receive. Hold CTRL to select multiple ?

- No related services needed
- Audiology
- Nurse
- Occupational Therapy
- Physical Therapy
- Psychology
- Social Work
- Vision Services

✓

Set Archive Status

- Click the *Forms* tab on the left side of the screen
- Click *Set Archive Status*



- Click *Submit 504 Plan*
- Click *Submit & Close*

Set Archive Status

Set the Archive Status

Private SCH - Archive Svc Plan revision
Shortened Day - In Progress
Stop Evaluation
Submit 504 Evaluation
Submit 504 Evaluation and Plan
Submit 504 Plan
Submit 504 Transfer Student Checklist

needed.

Archive Status: -- Select --

Archive Status: -- Select --

Submit & Close Cancel

- Note: this process communicates your request for next steps to clerical staff at Central Office, for the selected student. See page 18 for detailed instructions on archiving.

XIII. Initial/Continuing Placement

5P-1 (Sec 504 Initial Placement) OR 5P-2 (Sec 504 Continuing Placement) Forms

Fill in each of the fields on the form, including:

- Date form sent to parents.
- Date of meeting.
- Date of effective placement: [If there are immediate, urgent needs, implementation date can be as soon as the following day. The time between meeting and implementation should be no more than one week. Think about: How long will it take to notify teachers? How long should parents have to review it and make the determination to approve it?]
- Parent participation information
- Section 504 Plan Implementation: Describe the placement in which the 504 plan will be implemented. [The vast majority of 504 Plans consist of regular education setting only. Consult with 504 PSTs with questions about placement in other settings.]
- Indicate yourself as the “District Contact” by typing last name and clicking the apple button.
- Obtain parent/guardian signature on *Sec 504 Initial Placement (5P-1) form* ONLY [no need for obtaining signature on the *Sec 504 Continuing Placement (5P-2) form*]
See page 26 of this guide for instructions on using Adobe Sign.
- After archiving, scan and email signed form to idearecords@madison.k12.wi.us (page 20).

XIV. Assessment/Testing Forms

See pages 6 and 7 of this guide for which of the 4 testing forms are needed.

*For English Language Learners, you will also need to complete Form I-7ELL (Statewide Assessments - ACCESS (K-12, ELL))

Envelopes

Existing Forms Archived Forms **New Forms** Smart Forms

All ENGLISH ☐ Erase IEP Team ☐ Blank Form

Form No.	Description
3269	CCRP Chcklist to Address Culturally Responsive Practice
3269	R-1 Referral Form
0	IE-1 Notice of Referral
3269	I-1 Invitation to an IEP Team Meeting
3269	I-3 Cover Sheet
3269	BSPN Behavior Support Plan NVCI (rev 08/23)
3269	I-7DW District Assessments - FAST, ANet, Civics, (KG-12) X
0	I-7ELL Statewide Assessments - ACCESS (K-12, ELL) X
0	I-7PA Statewide Assessments PreACT Secure (9&10) X
0	I-7FW Statewide Assessments - Forward (Gr 3-8, 10) X
0	I-7WW Statewide Assessments ACT Writing (Gr. 11) X
3269	TRN-1 Madison Transportation Form
3269	5R-1 Sec 504 Referral

Please complete the forms indicating:

1. Are accommodations required? Yes or No
2. Which accommodations are indicated in the 504 Plan? This will allow schools to access this information to prevent testing accommodations from being missed.

Helpful Tool regarding Forward Exam:

[Forward Exam Accessibility Training](#)

ACT Accessibility Supports

Universal Supports

A universal support is an aid made available to all examinees to foster greater inclusion in the standardized test. Universal supports are embedded into testing practices.

Examples of universal supports include, but are not limited to, the following:

- Test booklet used as scratch paper
- Working on scratch paper (provided in the testing room)
- Standard calculator for Applied Math
- General administration directions repeated if requested
- Asking for clarification of verbal instructions
- Marking items for review

Designated Supports

Designated supports are available to any examinee for whom a need has been identified and are approved by the test coordinator. Districts, schools, and administrative agencies have the authority to provide designated supports listed in this guide for any examinee if test security is not compromised and testing environment requirements are met. Generally, most examinees are tested with their peers; however, under certain circumstances, a change in testing conditions may be necessary for an examinee. Typically, these are adjustments to the testing environment. Most require advance planning to deliver.

Examples of designated supports include, but are not limited to, the following:

- Assistive devices/technology
- Food, drink, and medication for examinees with medical needs (does not include medical monitoring devices)
- Frequent breaks that do not stop the testing clock
- Noise buffers/ear plugs
- Permission to stand during testing
- Time remaining indicator
- Service animal
- Small group/one-to-one testing

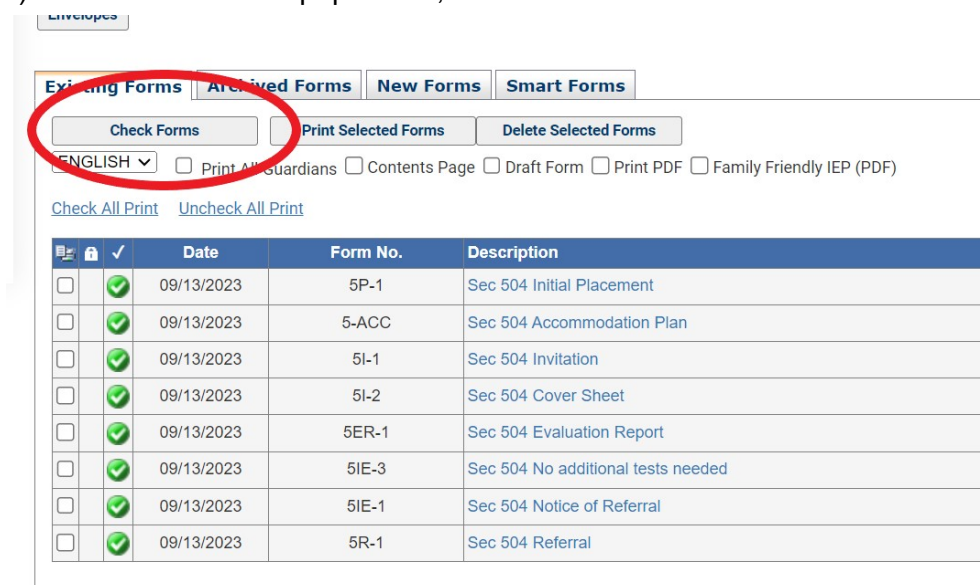
For further information:

[Accessibility Supports Guide for ACT](#)

XV. Archiving Documents: Detailed Instructions

*Before clicking the **Check Forms** button, click Check All Print, right above the list of open forms, then click the button **Print Selected Forms**. You don't need to actually print the forms, but need to print preview them before checking them for errors.

1) Within the student's paperwork, click "**Check Forms**"



Existing Forms | Archived Forms | New Forms | Smart Forms

Check Forms | Print Selected Forms | Delete Selected Forms

ENGLISH ☐ Print All Guardians ☐ Contents Page ☐ Draft Form ☐ Print PDF ☐ Family Friendly IEP (PDF)

[Check All Print](#) [Uncheck All Print](#)

☐	☒	Date	Form No.	Description
☐	☒	09/13/2023	5P-1	Sec 504 Initial Placement
☐	☒	09/13/2023	5-ACC	Sec 504 Accommodation Plan
☐	☒	09/13/2023	5I-1	Sec 504 Invitation
☐	☒	09/13/2023	5I-2	Sec 504 Cover Sheet
☐	☒	09/13/2023	5ER-1	Sec 504 Evaluation Report
☐	☒	09/13/2023	5IE-3	Sec 504 No additional tests needed
☐	☒	09/13/2023	5IE-1	Sec 504 Notice of Referral
☐	☒	09/13/2023	5R-1	Sec 504 Referral



Existing Forms | Archived Forms | New Forms | Smart Forms

[Back To Forms](#)

Form Checks

No Form Errors

2) If forms are complete and ready to archive, you should see the message, "Form Checks, No Form Errors." If there are errors, goIDEA will prompt you to make corrections within the forms. THIS MUST BE COMPLETED FOR ALL FORMS BEFORE MOVING TO THE NEXT STEP. ALL FORMS SHOULD HAVE A GREEN CHECK MARK WHEN THEY ARE READY TO ARCHIVE. FORMS WITH A YELLOW OR RED LOGO WILL NOT ARCHIVE.

3) Archive forms as directed on pages 12 and 14. You can also archive the Evaluation and Plan together:

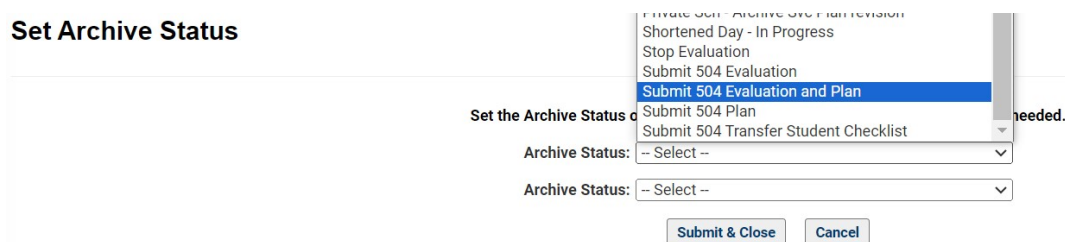
Set Archive Status

- Click the *Forms* tab on the left side of the screen
- Click *Set Archive Status*



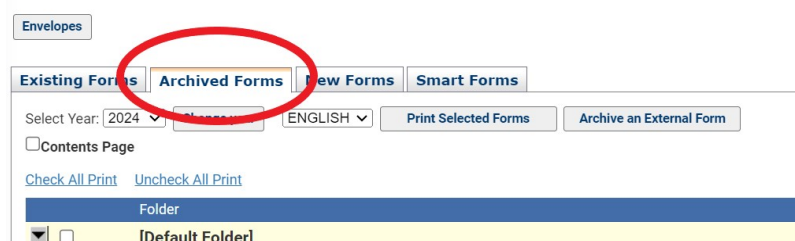
- Click *Submit 504 Evaluation and Plan*
- Click *Submit & Close*

Set Archive Status



4) This command will then automatically go to a Student Services program assistant who will review the paperwork. The paperwork will take a few days to actually archive within goIDEA.

After a few days, you will see your paperwork under the Archived Forms menu.



5) In addition to archiving the paperwork in goIDEA, scan and email all forms with signatures on them to IDEA Records (page 20).

XVI. Scan and Email Signature Pages to IDEA Records

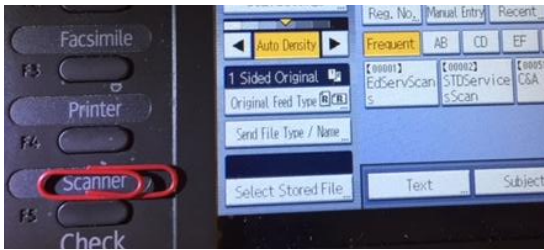
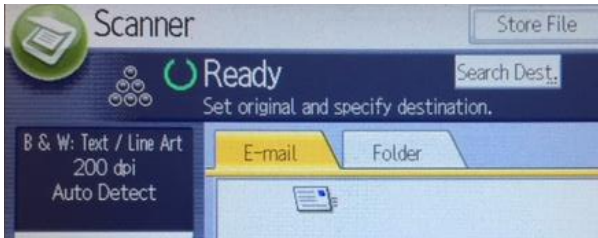
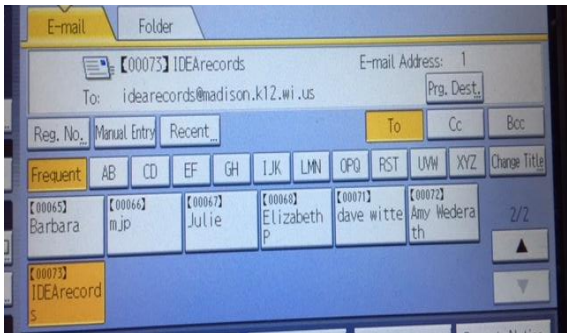
Instead of faxing ~ Scan & email ~ IDEAreords@madison.k12.wi.us

These documents should be scanned and emailed using the Ricoh scan/copy machines located in the schools. The Ricoh scan/copy machines located in the schools will be used to email signature pages, or transfer paperwork directly to the IDEA Records Office.

Directions for scanning forms to IDEA Records Managers from your Ricoh copier:

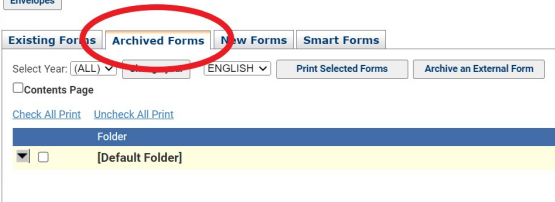
1. Lay papers face side up in tray
2. Press the "Scanner" button (to the left)
3. Choose the "Email" folder from the LCD screen
4. Find the "Idea Records" email and select it by pressing it
5. Press Start button

See picture instructions for scanning to email from your Ricoh machine in the school..

1. Select Scanner using buttons	
2. Select E-mail	
3. Select IDEAreords (you can include yourself at this point as a confirmation) This email should be programmed into the IJK button for easy access	
4. Push Start	

XVII. Archiving External Forms in golDEA

signature forms should get emailed to idearecords@madison.k12.wi.us

Instructions	
Save 504 Evaluation to be adopted as '504 Evaluation - Last Name' Save 504 Plan to be adopted as '504 Plan - Last Name'	
golDEA -Go to the Archived Forms Tab	
Select Button - Archive an External Form	
Select Choose File. Browse to find the PDF to be uploaded [ie. 504 Evaluation - Brown] and select Open. Note - files with an apostrophe in the name will not upload.	Select a File to Archive: Choose File No file chosen Upload Cancel Valid file types: MS Word, MS Excel, Rich Text (.RTF) or Adobe Acrobat (.PDF) Maximum file size: 2 GB
Click Upload	Select a File to Archive: Choose File 504 Evaluation - Brown.pdf Upload Cancel Valid file types: MS Word, MS Excel, Rich Text (.RTF) or Adobe Acrobat (.PDF) Maximum file size: 2 GB Current file size: Less than 1 MB

- Special Document: leave as PDF
- School Year - leave as is
- Folder - leave in default folder
- Description - leave as file name
- Click **Save**

Your document has been uploaded. Following are the details:

Form ID: 993106
Uploaded Form: 504 Evaluation - Brown.pdf
Special Document: PDF
School Year: 2024
Folder: -- Default Folder --
Description: 504 Evaluation - Brown.pdf

The description is currently set to the filename of the document you have uploaded. If you wish, you may change the description and save it now.

XVIII. Transfer 504

Envelopes

Existing Forms Archived Forms **New Forms** Smart Forms

504 ENGLISH ☐ Erase IEP Team ☐ Blank Form

District	Form No.	Description
3269	5R-1	Sec 504 Referral
0	5IE-1	Sec 504 Notice of Referral
0	5IE-2	Sec 504 Consent for Additional Testing
0	5IE-3	Sec 504 No additional tests needed
0	5I-1	Sec 504 Invitation
3269	5I-2	Sec 504 Cover Sheet
0	5ER-1	Sec 504 Evaluation Report
3269	5OTPT	Sec 504 OT PT Evaluation Report
3269	5-ACC	Sec 504 Accommodation Plan
0	5I-12	Sec 504 Manifestation Determination
0	5P-1	Sec 504 Initial Placement
0	5P-2	Sec 504 Continuing Placement
3269	5-OT	Sec 504 OT Treatment Plan
3269	5-PT	Sec 504 PT Treatment Plan
3269	5-TSC	Sec 504 Transfer Student Checklist
3269	5-DISP	Sec 504 Disposition Report

If a student enrolls with a 504 plan from another district, the 504 should be reviewed by the new case manager (school psychologist or school nurse) to determine if the plan can be adopted. The following should be considered:

-If the evaluation is thorough and the accommodations can be implemented without revisions, the 504 can be adopted and the following form should be filled out in goIDEA: **MMSD Transfer Student Checklist (5-TSC)**. When filling out this form, check the box “the previous district 504 plan can be adopted by MMSD” and enter the start date of the plan as the start date of the original plan. A copy of the evaluation and plan (from the previous school district) should be scanned directly into goIDEA - see ‘Archiving External Forms’ (page 21). Complete the necessary I-7 testing accommodation forms (page 6). Once the MMSD Transfer Student Checklist is complete, set Archive Status to: Submit 504 Transfer Student Checklist. The 504 case manager should provide school staff with copies of the 504 plan.

***See end of this section regarding obtaining parent/guardian signature for initial placement.

-If the evaluation is not thorough, but the current 504 plan accommodations are appropriate, adopt the plan and initiate an initial evaluation process. Fill out the **MMSD Transfer Student Checklist (5-TSC)** in goIDEA. When filling out this form, check the box “the previous district 504 plan can be adopted by MMSD” and enter the start date of the plan as the start date of the original plan. A copy of the plan only (from the previous school district) should be scanned directly into goIDEA - see ‘Archiving External Forms’ (page 21). Once the MMSD Transfer Student Checklist is complete, set Archive Status to: Submit 504 Transfer Student Checklist. The 504 case manager should provide school staff with copies of the existing 504 plan. Within a reasonable amount of time after the student enrolls, schedule an initial 504 meeting. The team should take some time to do a thorough evaluation and consider if the 504 is still the correct tool to meet the student needs. Complete all paperwork for an initial 504 (page 6). After the initial evaluation meeting and possible revision of accommodations, distribute new copies of the 504 plan to staff.

***See end of this section regarding obtaining parent/guardian signature for initial placement.

-If the evaluation is thorough but the accommodations cannot be implemented without revisions, the 504 case manager should schedule an annual 504 meeting to create new accommodations, within a reasonable amount of time after the student enrolls. Fill out the **MMSD Transfer Student Checklist (5-TSC)** in golDEA. A copy of the evaluation only (from the previous district) should be scanned directly into golDEA - see 'Archiving External Forms' (page 21). Once the MMSD Transfer Student Checklist is complete, set Archive Status to: Submit 504 Transfer Student Checklist. The team should take some time to get to know the student, determine current needs, and consider if the 504 is still the correct tool to meet those needs. Complete all paperwork for an annual 504 (page 7). After the annual meeting and creation of new accommodations, distribute copies of the 504 plan to staff.

***See end of this section regarding obtaining parent/guardian signature for initial placement.

-If both the evaluation and accommodations are not acceptable, initiate an initial evaluation. Within a reasonable amount of time after the student enrolls, schedule an initial 504 meeting. The team should take some time to do a thorough evaluation and consider if the 504 is still the correct tool to meet the student needs. Complete all paperwork for an initial 504 (page 6). After the initial evaluation meeting and development of new accommodations, distribute copies of the 504 plan to staff.

*****Regarding obtaining parent/guardian signature for initial placement:**

IF the 504 is from another school in Wisconsin, no signature is needed from the parent/guardian.

IF the 504 is from out of state, please complete the consent for initial placement form (5P-1), request signature from parent/guardian, and scan to IDEA Records (page 20).

XIX. Exiting from Section 504

- A student may only be exited from Section 504 after a reevaluation determines that the student no longer has a physical or mental impairment, or no longer needs accommodations. Please see page 6 of this guide for a list of required documents for this process (documents #1-6 must be completed).
- If a student with a 504 Plan is evaluated by an IEP team and found eligible for an IEP, then the student's 504 plan is replaced by the IEP, and no 504 reevaluation is needed. [Send this letter home to parent/guardian\(s\)](#).
- Oasys and IC should automatically update to reflect student status.

XX. Interpretation and Translation of 504 Documents

Similar to IEP meetings, oral interpretation is available for families who need language support. The following form is a staff-only page that triggers the request process for oral interpretation:

<https://multilingual.madison.k12.wi.us/student-services-interpretation-request>

<https://www.madison.k12.wi.us/multilingual-global-education/contact-information>

Request for Written Translation:

<https://staff.madison.k12.wi.us/departments/multilingual-services-programs/interpretation-and-translation/interpretation-and-translation-for-special-education/request-for-written-translation-of-a-n-iep>

IEP and 504 translations are sent directly to the parents via email.

XXI. Obtaining Signatures Using Adobe Sign

Training Video ~ [sending and receiving electronic signatures](#)

SIGNING IN

[Sign into Adobe Sign](#)



Sign In To Your Account

Email:

Password:

☐ Remember Me

Sign In

[I forgot my password](#)

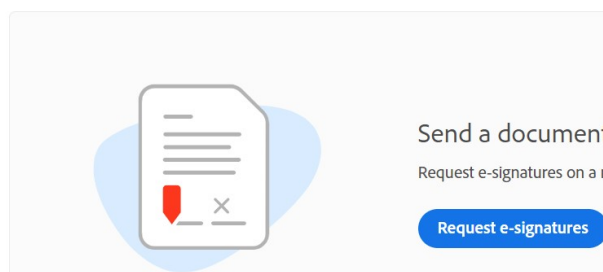
Enter your email, then push the Tab key - NO PASSWORD NEEDED

GATHERING SIGNATURES

Select **Send** in the Menu Banner options



Welcome, [REDACTED]



Add Recipients

Get documents signed

Send an agreement to others for e-signing, approval, or other processing.

Recipients *

Complete in Order ☐ Complete in Any Order ☒



Name the Message & Attach Files

[Name of the Form] if only sending one form

Requesting Signatures for [student initials] if sending multiple forms

Message *

Section 504 Initial Placement

Please review and complete Section 504 Initial Placement.

Files *

Add Files

To Add File/Document from goIDEA:

In goIDEA, use the Print PDF option to open.
Download and Save.

Existing Forms Archived Forms New Forms Smart Forms

Check Forms
Print Selected Forms
Delete Selected Forms

ENGLISH
☐ Print All Guardians
☐ Content Page
☐ Draft Form
☒ Print PDF
☐ Family Fi

[Check All Print](#)
[Uncheck All Print](#)

		Date	Form No.	Description
☒		12/06/2023	5P-1	Sec 504 Initial Placement

XXII. Transportation requests within a 504

-  Student Transportation Needs Flowchart
 - Please note: The flowchart is a reference tool. There may be situations when transportation is included as an accommodation without documentation from a healthcare provider. AD approval is always required for an initial transportation request.
- Any initial 504s that are considering transportation as an accommodation need an AD or Director of Student Services to approve the request. Even if the student previously had an IEP in place with transportation provided, the request needs to be approved when the student exits special education and receives accommodations through a 504.
- Medical documentation per [MMSD Board Policy 5111](#): A student who has a physical handicap which does not require special education programming may be provided transportation upon presentation of a healthcare provider's written statement of the nature of the disability and the duration of the need for transportation. Scan and email medical documentation to IDEA Records. Please include the student name and number on documentation.
- The TRN-1 (Madison Transportation Form) needs to be added to the 504 paperwork in goIDEA.

3269	PTP-1	Physical Therapy Treatment Plan
3269	TRN-1	Madison Transportation Form
3269	5R-1	504 Referral
0	5IE-1	Sec 504 Notice of Referral

IMPORTANT: After the TRN-1 form is archived, please email Stacie Will (PST, Dept. of Student Services) @ swill@madison.k12.wi.us and Sara Hayes (Nurse Coach, Special Education/504) @ sjtoney@madison.k12.wi.us regarding the request. At this time, TRN-1 forms do not get to the transportation department for routing if a student is not actively enrolled in special education. Until this is resolved, we will need to manually manage these to ensure that students get their appropriate rides set up/changed/ended, etc. Please email Stacie and Sara for any initial requests, and also for any changes to transportation, including ending transportation.

Once transportation is set up, the 504 case manager communicates the route information to the family. The 504 case manager should also communicate this information to the family at the start of each school year.

XXIII. Assistive Technology (AT) requests within a 504

[MMSD Assistive Technology Website](#)

[Consult Request](#) (complete this form to meet with someone on the AT team to brainstorm around a student need)

[Trial Request](#) (complete this form to request a trial of an item in the AT loan library)

[Assignment Request](#) (complete this form if the tool needs to be assigned to the student after collecting data throughout the trial period)

Check out what is available in the AT loan library:

 [Quickstart Guide for Accessing MMSD's AT Loan Library](#)

Access books (novels & textbooks) in electronic format while following along with the audio and word/sentence highlighting. Free for students with barriers to reading:

 [Bookshare Information](#)

Google Extension of reading and writing supports on a Google Doc or other Google apps or on an Internet page:

 [Read&Write for Google Chrome Guide and Demos and MMSD Links](#)

Each school has an AT Toolkit full of AT items to trial. In the document below, click on AT Toolkit Important Links on the bottom for more information and who is your school's AT Point Person:

 [AT Toolkit Quick Guide](#)

XXIV. High School Seniors and 504 Plans/Meetings

Annual 504s for graduating seniors:

Regarding annual 504s, if the accommodations are still working, and parent/guardian/student is in agreement with forgoing an actual meeting, call/email parent/guardian about the plan and document that communication in the 504 Cover Sheet under parent/guardian communication/participation, and leave everything else as is. (Make sure to ask if there are any updates to the documented disability). Complete the needed 504 paperwork: page 7. The only assessment form needed for seniors would be: I-7DW District Assessments - FAST, ANet, Civics, (KG-12), and depending on what time of year the 504 is completed, this form may not be needed.

Reeval 504s for graduating seniors:

For reevals, it is best practice to hold at least a brief virtual meeting to confirm that everyone is in agreement with the Accommodation Plan and that nothing additional is needed. Make sure to ask if there are any updates to the documented disability. Complete the needed 504 paperwork: page 6. The only assessment form needed for seniors would be: I-7DW District Assessments - FAST, ANet, Civics, (KG-12), and depending on what time of year the 504 is completed, this form may not be needed.

XXV. Differences between K12 and College Accommodations

- Previous accommodation plans in high school can be helpful but will not automatically guarantee a student has the same accommodations in college. When a student [applies for accommodations](#) (example from UW Madison McBurney Disability Resource Center), one part of the process is reviewing documentation. This includes previous assessments from healthcare providers and 504 plans from K12. It is up to the student/family to share previous accommodation plans with the college.
- Not all accommodations in high school are available in a college setting but here are [some examples to review](#) (example from UW Madison McBurney Disability Resource Center).
- In K12 there is a 504 team that includes a case manager, educational staff, and parents/guardians. In college it is a lot more dependent on the student to drive the plan.
- A 504 plan can not be developed in high school anticipating the student MIGHT need one in college.
- Recommend to families to reach out to disability resource centers at individual colleges their student is considering.

XXVI. Students with 504 attending Madison College

Any STEM Academy or full-time academy student plans can be sent to Laz at LEnriquez@madisoncollege.edu, and they can help connect students to DRS to start the accommodation process. Students can also submit the documentation directly to DRS: <https://students.madisoncollege.edu/resources/disability/accommodations>.

XXVII. Requesting Chair Pay for 504s

Case managers receive chair pay for the last meeting of a 504. Initials and Reevaluations only.

Please submit that time via this timesheet: [Request for Compensation for Performing Additive Duties in Special Education and 504 Programs](#). Please put 0:00:00 as the meeting start and end time, indicate you are the chairperson/case manager, and select "yes" to the question asking if you are requesting chair pay.