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

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

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

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

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

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

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

PROCEDURES:

I. LAUSD Section 504 Designees, Case Managers, and designated school office staff who do not currently have an active Welligent account should complete the following steps before attempting to access the Welligent Management System Section 504 Program module:

A. Activate their account by visiting the Welligent Support Unit.

B. Review Welligent Support Technical Guide (Attachment A) regarding minimum requirements for Windows and Macintosh operating systems to improve user functionality.

• Internet Explorer is the required browser for PC users when accessing the Welligent Section 504 Program Module;
• Safari is required for Macintosh users; however, use of a Macintosh may limit functionality; and
• Firefox, Chrome and Windows Edge are not compatible browsers; therefore, a loss of functionality would result.

II. Section 504 Designees, Case Managers, and designated school office staff should identify students currently eligible under Section 504 at their school by following instructions outlined in the Welligent Section 504 Program Module Quick Sheet (Attachment B: #12) to generate a Welligent Section 504 Report. Review the report for accuracy and update the information in the Welligent Section 504 Program module “Section 504 Details” as necessary.

A. Locate the most current Section 504 Plan for each student.
PROCEDURES (continued):

1. All current Section 504 documents with signatures and supplemental pages should be scanned and uploaded as an attachment to the student’s Welligent Section 504 record immediately upon completion of the Section 504 evaluation.

2. If the Section 504 Plan cannot be located in the student’s cumulative record folder or Welligent, follow procedures in the most current BUL-4692 Section 504 of the Rehabilitation Act of 1973, to conduct a Section 504 re-evaluation using the Welligent Section 504 Program module as outlined in Section III of this reference guide.

B. Conduct a student record search in Welligent to determine if a Section 504 record has been previously created by following instructions outlined in the Welligent Section 504 Program Module Quick Sheet (Attachment B).

   1. If a record has been created, review Section 504 Details and update if necessary.
      a. Review Welligent Section 504 documents to determine if they are complete and delete any duplication (Attachment B: #9).
      b. If no documents can be located, check to see if the records were previously scanned and attached (Attachment B: #7).

   2. If there is no Section 504 student record in the Welligent Section 504 Program module for a student who has a Section 504 plan in the cumulative record, proceed to step C below.

C. Create a Section 504 record in the Welligent Section 504 Program module for each student following the procedures outlined in the Welligent Section 504 Program Module Quick Sheet (Attachment B).

   1. Update/enter Section 504 details (Attachment B: #5).
   2. Scan and/or attach relevant Section 504 plan documents to the student record (Attachment B: #7).

III. All documents for future Section 504 initial evaluations, re-evaluations, and manifestation determinations shall be developed and saved within the Welligent Section 504 Program module following the instructions outlined in the Welligent Section 504 Program Module Quick Sheet (Attachment B: #3-7).

IV. Upon accessing the Welligent Management System, follow instructions...
PROCEDURES (continued): outlined in Attachment B when conducting the following activities as necessary:

1. Locating a Student Record/Student Record Search
2. Locating the Section 504 Student Record
3. Creating the Section 504 Record for the First Time
4. Editing the Section 504 Student Record
5. Updating Section 504 Details and Creating Forms
6. Creating Forms for a Re-Evaluation
7. Attaching Relevant Section 504 Documents to the Student Record
8. Receiving System Alerts
9. Deleting a Section 504 Form
10. Locking a Section 504 Form
11. Generating a Section 504 Report

V. Welligent Section 504 Program module users may access the following training on MyPLN:

A. “Welligent Section 504 Self-Guided Lab”
   Online training in a computer lab format with step-by-step instructions on generating Section 504 reports, creating records, and updating Section 504 details in the Welligent Section 504 Program Module.

B. “Special Education and Section 504 MCD Clerk Training”
   Outlines procedures, specific roles, and responsibilities of clerical staff assigned special education and Section 504 tasks.

C. “Section 504 Procedures” Outlines the four phases of the Section 504 process.

RELATED RESOURCES:  

BUL-4692 Section 504 of the Rehabilitation Act of 1973, issued by the Office of the General Counsel

REF-5640 Clerical Support for Special Education and Section 504 as Required by the Modified Consent Decree, issued by the Division of Special Education
ASSISTANCE: For further information, contact the following District Offices:

Educational Equity Compliance Office (EECO): (213) 241-7682
Visit the EECO website for related information: http://achieve.lausd.net/eeco

Welligent Support: (213) 241-5200

District Nursing Services: (213) 202-7580

Your Local District Operations/Section 504 Designee

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

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

**Opening a PDF form in Welligent**

When opening a PDF form, ensure the top section of the form displays a green bar and states “The file includes fillable form fields......”. If the form displays a yellow bar at the top, click on Options and select “Add Host To Privileged Locations”. This will change the yellow bar to green and allow the student data to pre-populate.

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

**Install the latest version of Adobe Reader**

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

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1 Welligent Technical Requirements: PDF Forms

REF-6241.4 Office of the General Counsel

February 2, 2020
Adobe Reader Settings for Internet Explorer users

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

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

Internet Explorer settings can be verified in Adobe Reader.

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

Enable Plugins

1. Open Internet Explorer
2. Click Tools
3. Click Internet Options
4. Click Programs
5. Click Manage Add-ons
6. Click Toolbars and Extensions and enable all Adobe application add-ons
For Safari users (version 7 and below), Reset Safari Settings

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

Windows:
1. Open Safari
2. Click Safari Settings
3. Click Reset Safari
4. Check all checkboxes then click Reset
Welligent Technical Requirements: PDF Forms

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

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

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

Opening PDF’s in Chrome

1. Start Chrome
2. At the top right, click on the ellipsis button
3. Click on the Settings options
4. Go to the bottom of the screen and click on Advanced
5. Under "Privacy and Security" section, click on the Site settings
6. Click on “PDF documents”
7. Turn off Download PDF files instead of automatically opening them in Chrome.
8. Toggle switch to the on to the off position
I. FREQUENTLY USED FEATURES

1. LOCATING A STUDENT RECORD/STUDENT RECORD SEARCH

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

   b. Enter Student* ID # in the “Agency ID/Client ID” field
      - If Student ID is unknown, enter
        1. “Last Name”
        2. “First Name”
   c. Check the Global Search box.
   d. Click “Show All Fields” if you need to enter more information such as
      1. Date of Birth in the “DOB” field
      2. School of attendance in “Location” field
   e. Click the “Search” button at the top right hand side of the screen
*Based on the student information entered, one of the two following screens should appear:

**If Student ID number is entered, select “Program History”:**

![Program History screen]

**If the student’s name is entered, locate the student record below and select “Edit”:**

![Student record search screen]

2. **LOCATING THE SECTION 504 STUDENT RECORD**
   
a. Hover mouse over the orange cog wheel on the left
   
b. Select “Program History” in the Record Navigator
3. CREATING THE SECTION 504 STUDENT RECORD FOR THE FIRST TIME
   a. Click “New”

   ![Image of creating a new Section 504 student record]

   b. Select “Enroll”
   c. Click “Save”

   ![Image of selecting enroll and saving]

3b. 

4. EDITING THE SECTION 504 STUDENT RECORD
   a. Select “Edit” under “Program History”

   ![Image of editing section 504 student record]

   ![Image of the edit screen for Section 504 student record]
5. UPDATING SECTION 504 DETAILS and CREATING FORMS
   a. Enter information in “Section 504 Details” and/or “Section 504 Exit Details” for each phase of the process as appropriate
   b. Click the “Save” button to save updated Section 504 Details and/or Section 504 Exit Details
   c. To create a new Section 504 form, click the green plus sign for Phase I, II, III, or IV as appropriate and the documents required for that phase
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.”

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

c. Click “OK” when the following message appears

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

e. Click “OK” when the confirmation message appears

f. Click “Close”

g. The revised form for the re-evaluation will appear below the previous document
7. ATTACHING RELEVANT SECTION 504 DOCUMENTS TO THE STUDENT RECORD (Note that documents may not be deleted after they have been locked or uploaded)
   a. Click the drop down arrow next to “Paperwork/Forms” and select “Attachments”
   b. Any attached documents will appear in the Attachments window
   c. Attach required documents by clicking the “New Attach” button
   d. When the Welligent Upload window appears, enter a brief description of document that will be uploaded, i.e. “504 Plan 2/14/2014,” “Parent Input form 2/12/2014,” etc...
   e. Click “Browse” button to locate the file to be uploaded
f. Locate and select the file to be uploaded
   g. Click “Open”
   h. The file should appear in the “Upload File” field
   i. Click “Upload”
   j. Once the document is uploaded, a confirmation message should appear
   k. Click “Okay” to proceed
1. After clicking “Okay” if a confirmation window pops up, “select “Save”

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

n. Click “Close” to close the window

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

p. Select “Close” to return to the Section 504 Details screen
II. ADDITIONAL FEATURES

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

   The following student (SAMPLE, SAMPLE District IDSAMPLE123) 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
   a. Click on the Students picture on the top left corner
   b. You will receive a pop up window with the Students information
   c. Click on the Student icon on the bottom right corner
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.

a. Click the black plus sign icon for either phase I, II, III, or IV, as appropriate, to locate the form to be deleted

b. The number in parenthesis reflects the number of forms created in each phase

c. Upon locating the document/form to be deleted, click “Edit”

d. Click “Delete”

e. To delete the form click “OK”
f. Upon deleting the form, a confirmation message should appear

![Confirmation message for deleting form]

Upon returning to the Student Data window, click the “Refresh” button

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

![Student Data window displaying form versions]

11. LOCKING a SECTION 504 FORM (This only applies to forms that were created in the Welligent Module. This feature does not apply to forms that were uploaded/attached)
   a. Click “Edit” to open the form to be locked

![Form being locked]
b. Upon opening the form to be locked, select “2-Review and Approval” from the menu

c. Verify your user account and enter password below

d. Click “Verify/Sign”

e. When the confirmation message appears, click “OK.”
12. **GENERATING A SECTION 504 REPORT**

a. Click “Reports”

b. Select “Section 504 Reports” from the drop down menu

c. Select the desired Section 504 report by clicking the corresponding box
d. Select the school or District location as appropriate from the drop down menu by clicking the arrow. You may customize the report by Section 504 status. To generate a report of all students with 504 activity, leave the “Section 504 Status” field blank.

e. After selecting the school or District location, click “Run”