# LOS ANGELES UNIFIED SCHOOL DISTRICT
## REFERENCE GUIDE

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|---|---|---|
| **TITLE:** | Mandatory Use of the Welligent Section 504 Program Module to Conduct All Section 504 Activities | |
| **NUMBER:** | REF-6241.3 | |
| **ISSUER:** | David Holmquist, General Counsel<br>Office of the General Counsel<br><br>Julie Hall-Panameño, Director<br>Educational Equity Compliance Office | |
| **DATE:** | October 17, 2017 | |

**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 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-6241.2. All Section 504 forms must be developed and saved within the Welligent system. Upon completion of each Section 504 evaluation, a complete set of Section 504 documents, including supplemental pages and forms with signatures, must be uploaded and attached to each student's Section 504 record. Welligent 8 now has exclusive compatibility with Internet Explorer and Safari browsers. Screen shots and instructions for developing, revising, and saving forms within the Welligent Section 504 Program Module have been updated to reflect the Welligent 8 System.

**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 504and the Individuals with Disabilities Education Act (IDEA).

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

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 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.*

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| **PROCEDURES (continued):** | 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.

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 *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 utilize the following options for additional assistance:

A. MyPLN Training – *"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. Learning Zone Training – *"Special Education and Section 504 MCD Clerk Training"*
Outlines procedures, specific roles, and responsibilities of clerical staff assigned special education and Section 504 tasks as required by the MCD https://lz.lausd.net/lz/index.jsp.

C. Learning Zone Training – "*Section 504 Procedures"*
Outlines the four phases of the Section 504 process
https://lz.lausd.net/lz/index.jsp.

**AUTHORITY:**

This is a policy of the Superintendent of Schools.

**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

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 Support
# TECHNICAL GUIDE

### *Minimum Requirements for Windows & Macintosh Computers*
### Welligent Supported Operating Systems and Browser Versions

| OPERATING SYSTEM (OS) | BROWSER |
|---|---|
| Windows 7 or higher | Internet Explorer 11 |
| Mac OS | Safari 6.x or higher |

<u>NON-COMPATIBLE BROWSERS</u>: *Mozilla Firefox, Google Chrome and Windows Edge*

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## WINDOWS

### Display Internet Explorer Menu Bar    *Allows you to follow the settings instructions listed below*

- Open **Internet Explorer**                                                {Fig.1}
- Top right of screen, **right-click** on a blank area of the **Title Bar** to display pop-up menu (Fig.1)
- **Click** on **Menu Bar** to activate (Fig.1)
- The Menu Bar displays at top left (Fig.2)                 {Fig.2}
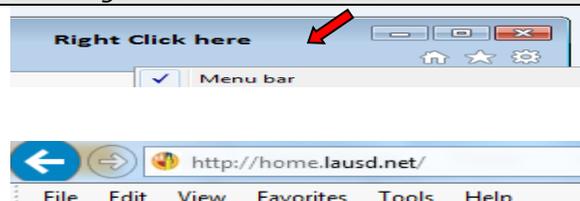
### Clear Compatibility View Settings  *Required for Version 8*

- Open **Internet Explorer**                                                {Fig.3}
- From the Menu Bar click on **Tools**, click **Compatibility View Settings**
- If l**ausd.net** is displayed under **Websites you've added to Compatibility View**, it needs to be removed: 1. Click on **lausd.net** and it will highlight in blue
  2. Click on the **Remove** button on the right
- Remove the checkboxes next to **Display intranet sites in Compatibility View** & **Use Microsft compatibility list**
- Ensure that the settings are blank as shown in *(Fig.3)*
- Click on **Close**
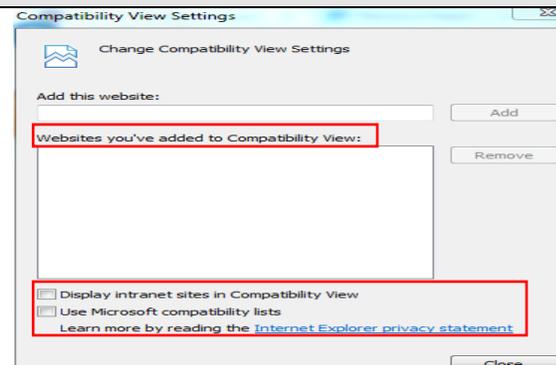
### Temporary Internet File Settings   *Refreshes the web page to the current information*

- Open **Internet Explorer**                                                {Fig.4}
- On the **Tools** menu, click **Internet Options**
- On the **General** tab, under Browsing History, click on the **Settings** button *(Fig.4)*                 {Fig.5}
- Under "Check for newer versions of stored pages:" Select **Every time I visit the webpage** (Fig.5)
- **Disk space to use** should be set to **250 MB** (Fig.5)
- Click on **OK,** and **Ok** to close screen
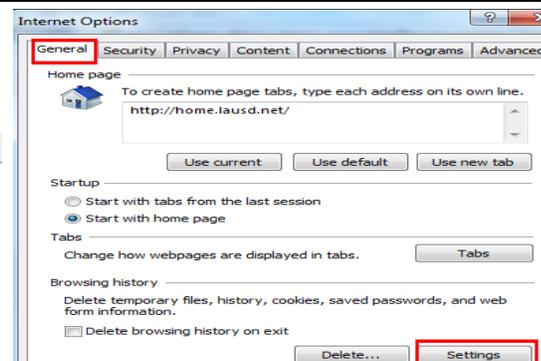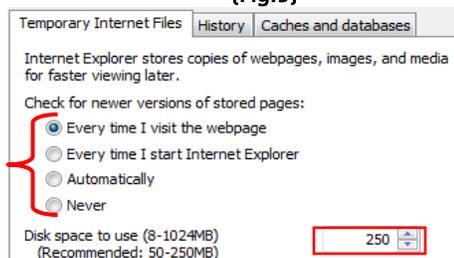
### Pop-up Blocker    *Turn off the Pop-up blocker for the Welligent website*

- Click **Tools** from the IE Menu bar                          {Fig.6}
- Select **Pop-up Blocker**
- Click on **Pop-up Blocker Settings**
- Type: **https://welligent.lausd.net** under address of website to allow *(Fig.6)*
- Click the **Add** button *(Fig.6)*
- Click on **Close**

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# Welligent Support
# TECHNICAL GUIDE
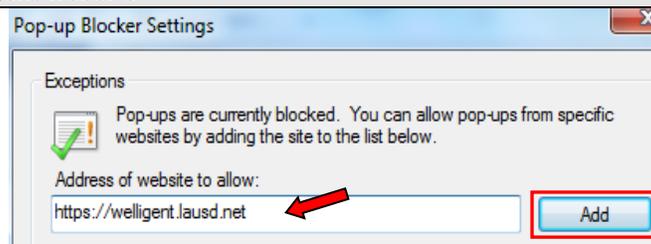
### *Minimum Requirements for Windows & Macintosh Computers*

## WINDOWS

### Adjust Printing          *Print IEP documents on one sheet*

- Open **Internet Explorer**                                    {Fig.7}
- On the **File** menu, click **Page Setup**
- Reset all **Margins** to 0.25 inches *(Fig.7)*
- Check the box next to **Enable Shrink-to-Fit**  *(Fig.7)*
- Under **Headers** and **Footers**, change all fields to **Empty** *(Fig.7)*
- Click on **OK**

**\*NOTE:**  Some printing problems may be resolved by downloading
 the latest **Postscript (PS)** printer driver from the printer's company website and reinstall the driver.
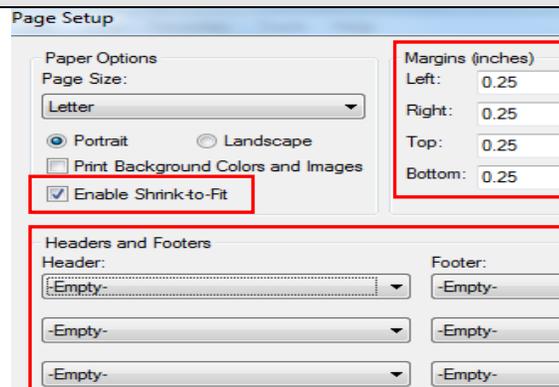


### Adjust Screen Resolution     *Change the appearance of your display*

- On the desktop, **right-click** on an empty space
- Click on **Screen Resolution**
- Change **Resolution**  to the **(recommended)** setting <u>depending on the monitor</u>
- Click **Apply**, and then click **OK**
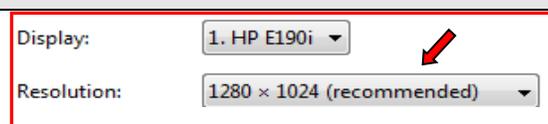


### Clear Cookies and Temporary Internet Files   *Clear copies of web pages visited  (Repeat as needed for maintenance.)*

- Open **Internet Explorer**                                    {Fig.8}
- On the **Tools** menu, click **Internet Options**
- On the **General** tab under Browsing History, Click on the **Delete** button *(Fig.8)*
- Select the check boxes next to:**Temporary Internet files**, **Cookies** & **History** *(Fig.9)*
- Click the **Delete** button at the bottom
- Click on **OK**

{Fig.9}
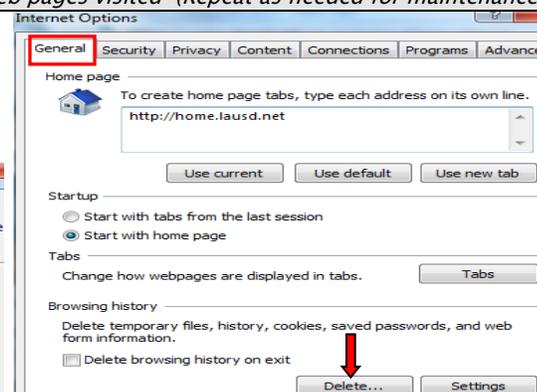


## MAC

### Pop-up Blocker    *Turn off the Pop-up blocker for the Welligent website*

- Top left of the screen, click on **Safari**  menu                {Fig.10}
- Click on **Preferences**
- Click on the **Security** icon found at the top of the row (Fig.10)
- Under **Web content,** uncheck **Block Pop-up windows** it should **not** have a checkmark in front of the choice (Fig.10)
- Top left, click on the **Red** button to close window
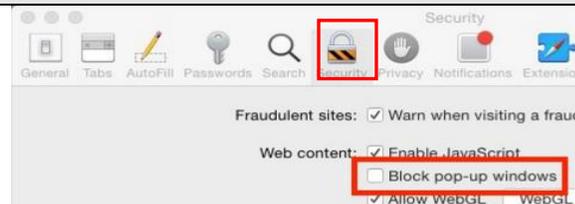


### Clear Cookies and Website Data        *Clear copies of web pages visited  (Repeat as needed for maintenance.)*

- Click on **Safari** menu, click on **Preferences**              {Fig.11}
- Click on the **Privacy**  icon found at the top of the row (Fig.11)
- Click on **Manage Website Data** (Fig.11)
- Once Website Data loads, click on **Remove All** button
- Click on **Remove now** button
- Click on the **Done** button
- Top left, click on the **Red** button to close window

# 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 purple bar and states "*Please fill out the following form……*".
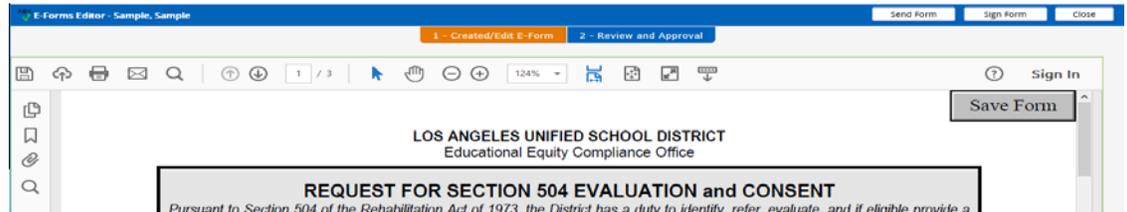


If the form displays a yellow bar at the top, click on **Options** and select "**Add Host To Privileged Locations**".  This will change the yellow bar to purple and allow the student data to pre--populate.
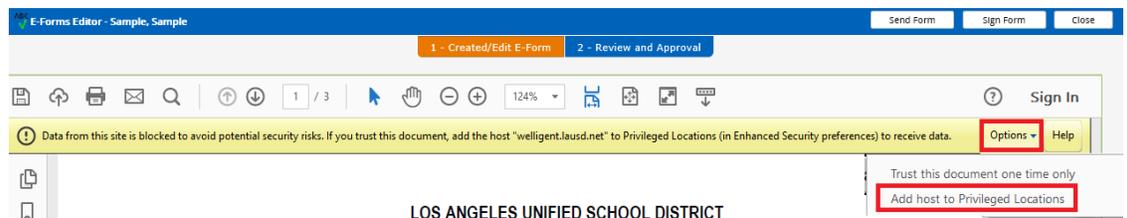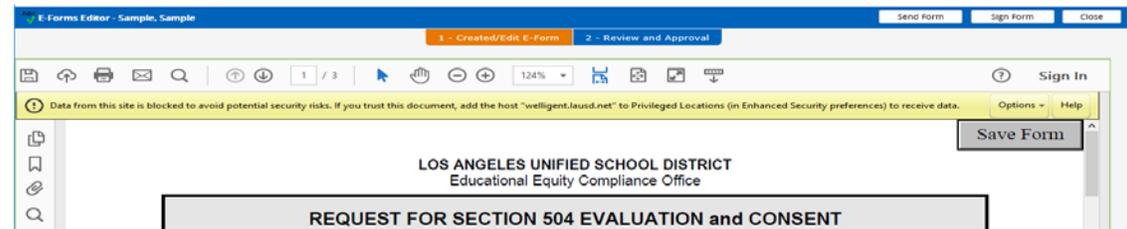


**If PDF forms do not pre--populate with student information, follow the steps provided below to adjust your Adobe Reader settings.**

## 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.  At the bottom, under Downloads, Click Adobe Acrobat Reader DC
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**
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# Welligent Technical Requirements: PDF Forms

## 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.
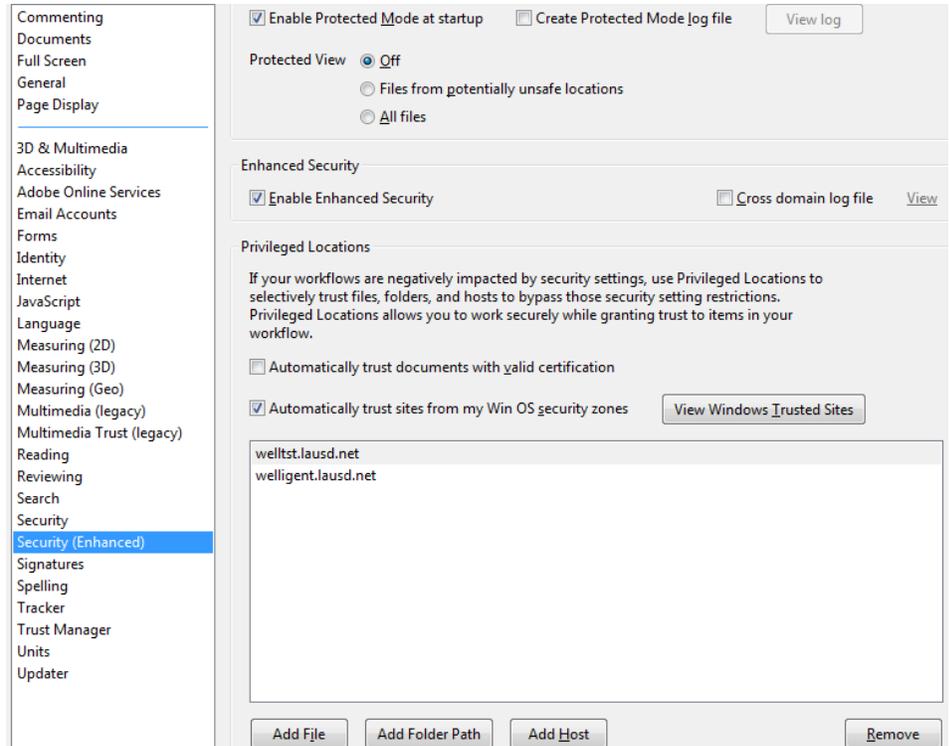
**Internet Explorer settings can be verified in Adobe Reader.**

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

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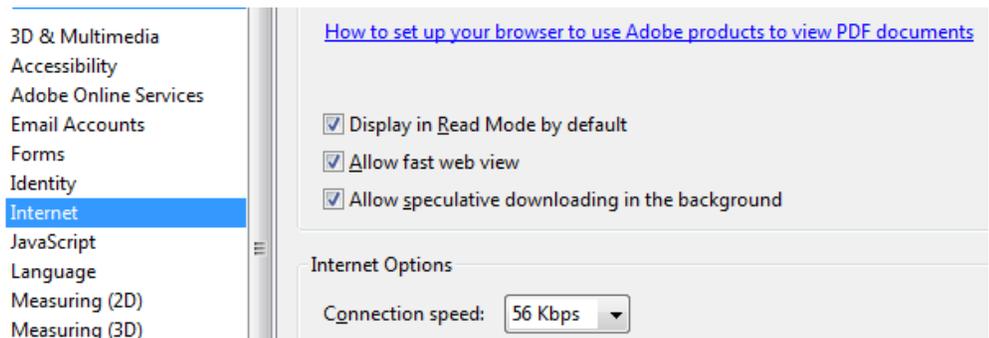
# Welligent Technical Requirements: PDF Forms

## 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

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# Welligent Technical Requirements: PDF Forms

## 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**
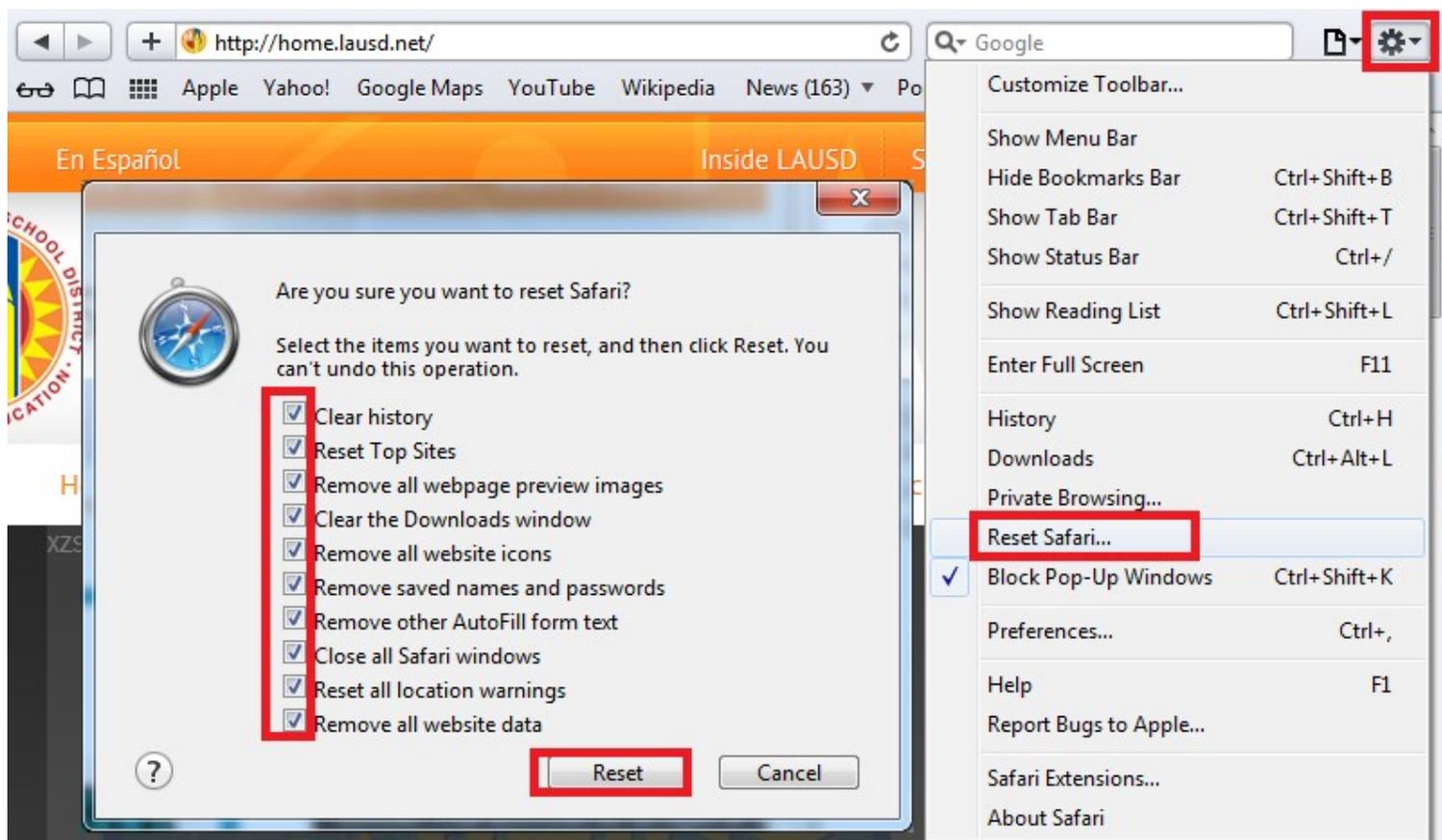
# Welligent Technical Requirements: PDF Forms

## 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
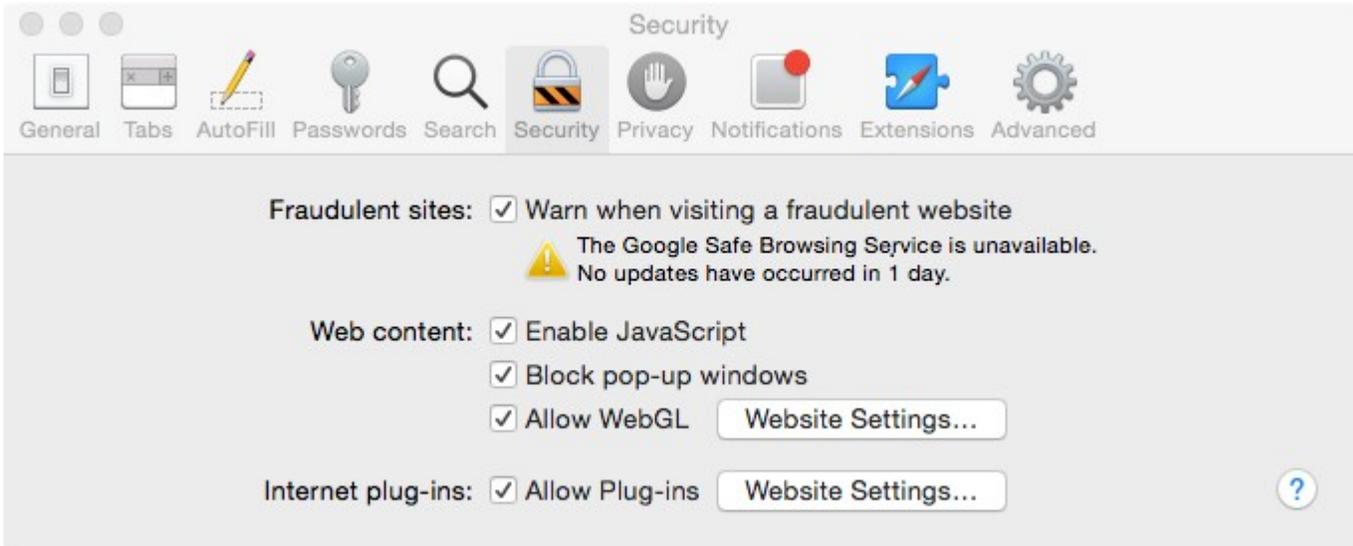


7. Click **Adobe Reader**
8. Select Welligent url (**welligent.lausd.net**)
9. Select **Allow Always**
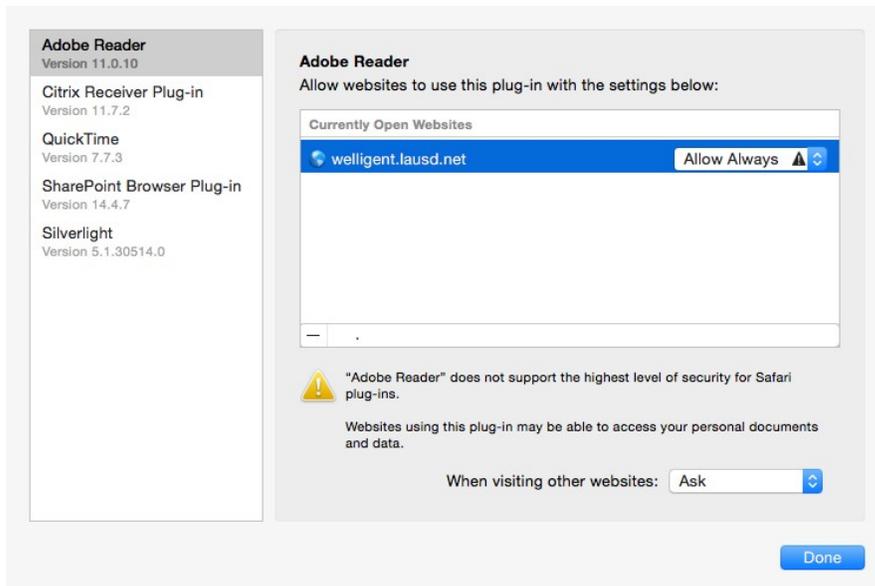
# Welligent Section 504 Program Module Quick Sheet

**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.
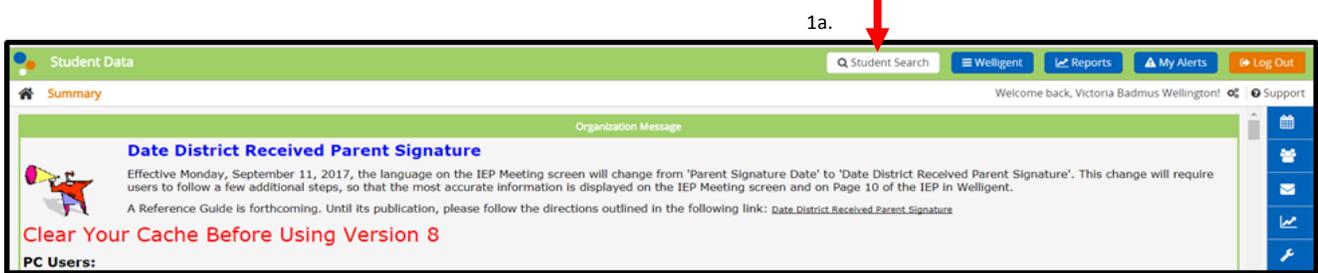


    b. Enter Student* ID # in the "Agency ID/Client ID" field
        - If Student ID is unknown, enter
            1. "Last  Name"
            2. "First Name"

    c. 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

    1b.                1c.
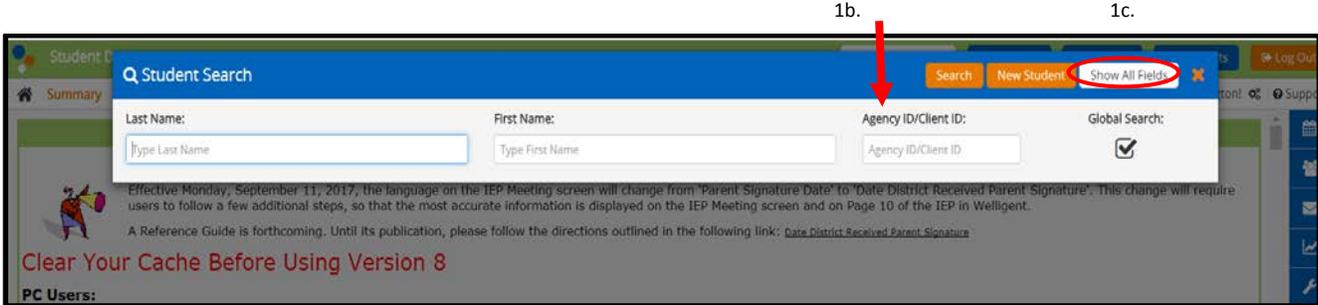


    d. Click the "Search" button at the top right hand side of the screen
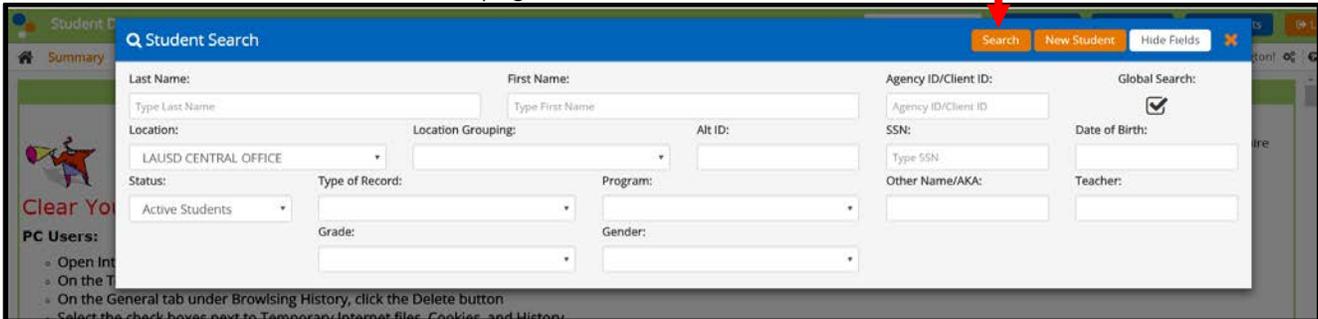
# Welligent Section 504 Program Module Quick Sheet

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

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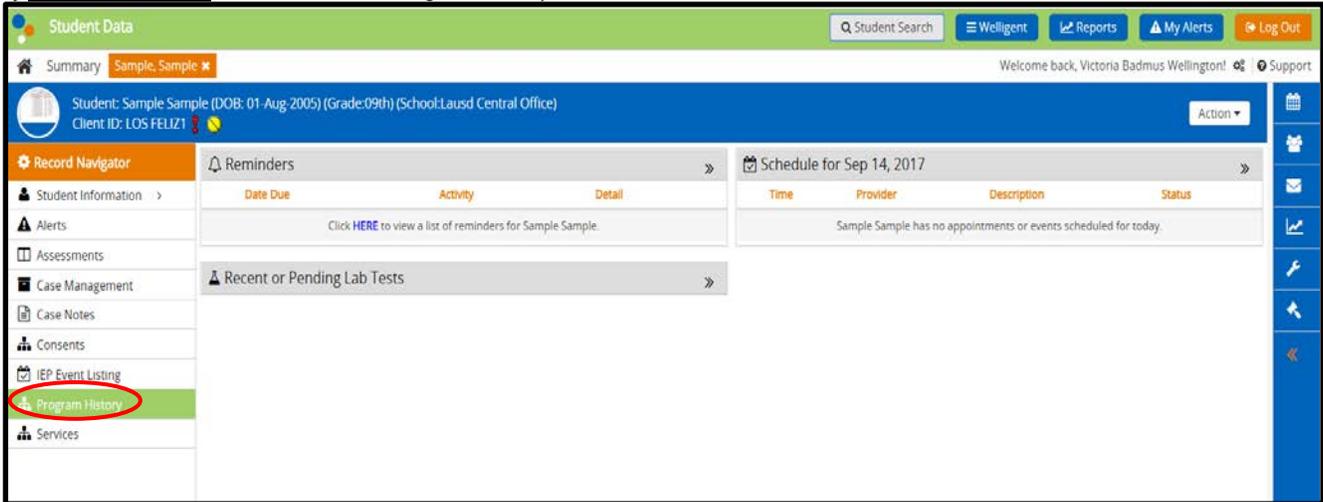


*If the <u>student's name</u> is entered, locate the student record below and select "Edit":*
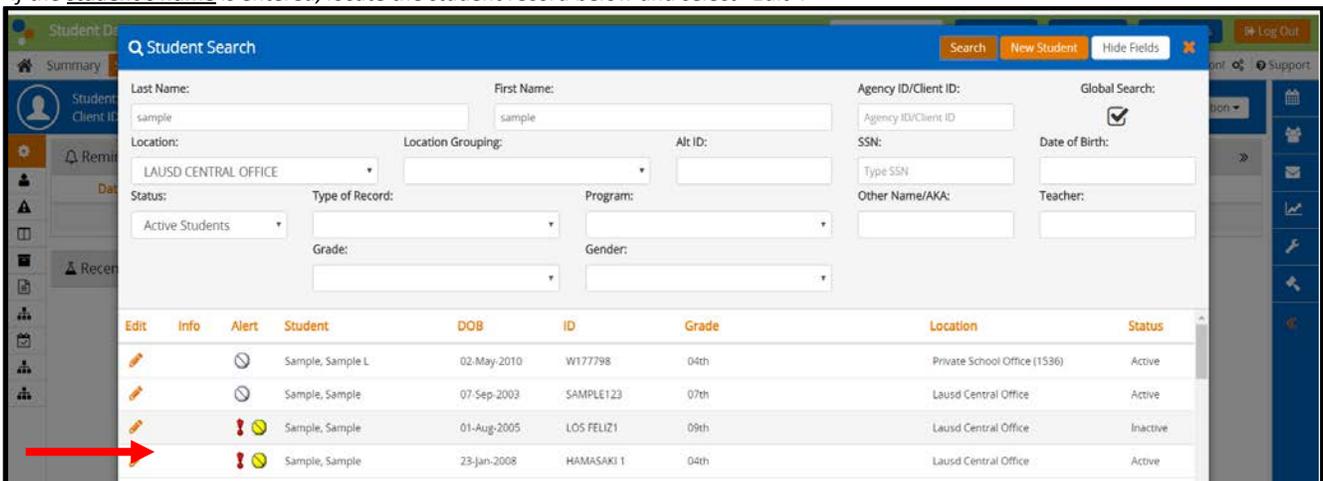


2. **LOCATING THE SECTION 504 STUDENT RECORD**
   a. Select "Program History" in the Record Navigator or the ⚙ icon
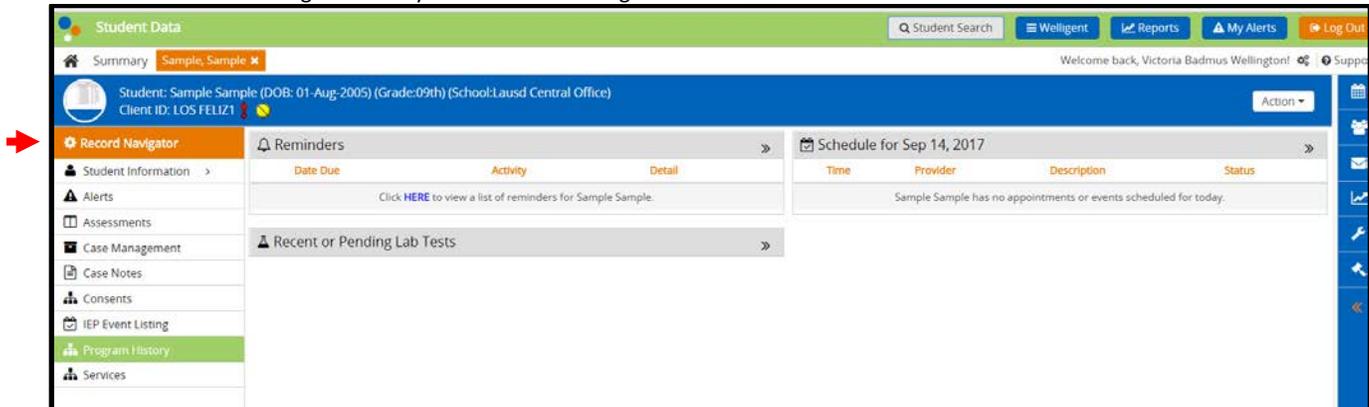
# Welligent Section 504 Program Module Quick Sheet

3.  **CREATING THE SECTION 504 STUDENT RECORD FOR THE FIRST TIME**
    a.  Click "New"
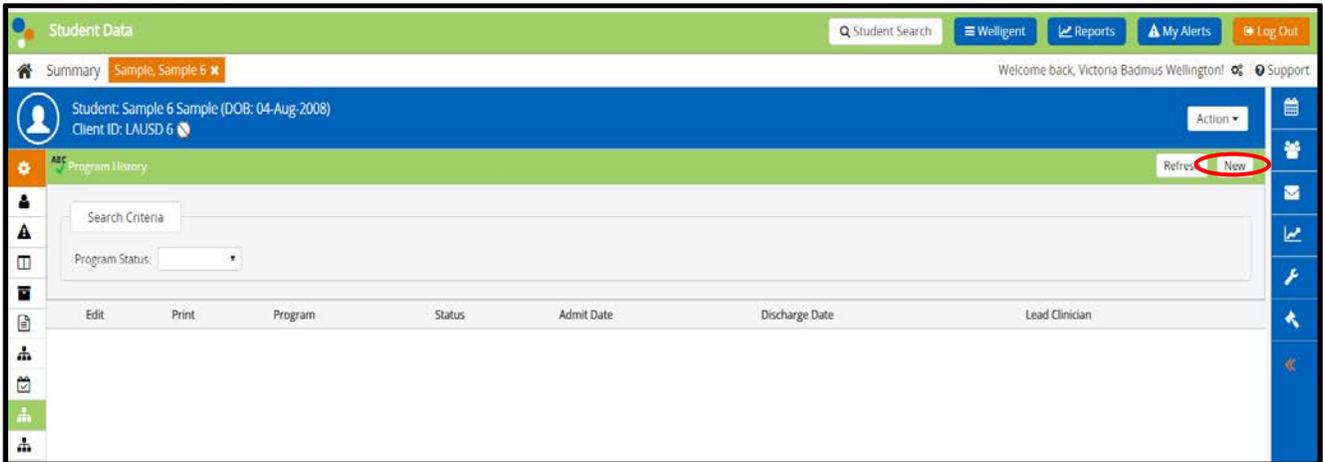


    b.  Select "Enroll"
    c.  Click "Save"
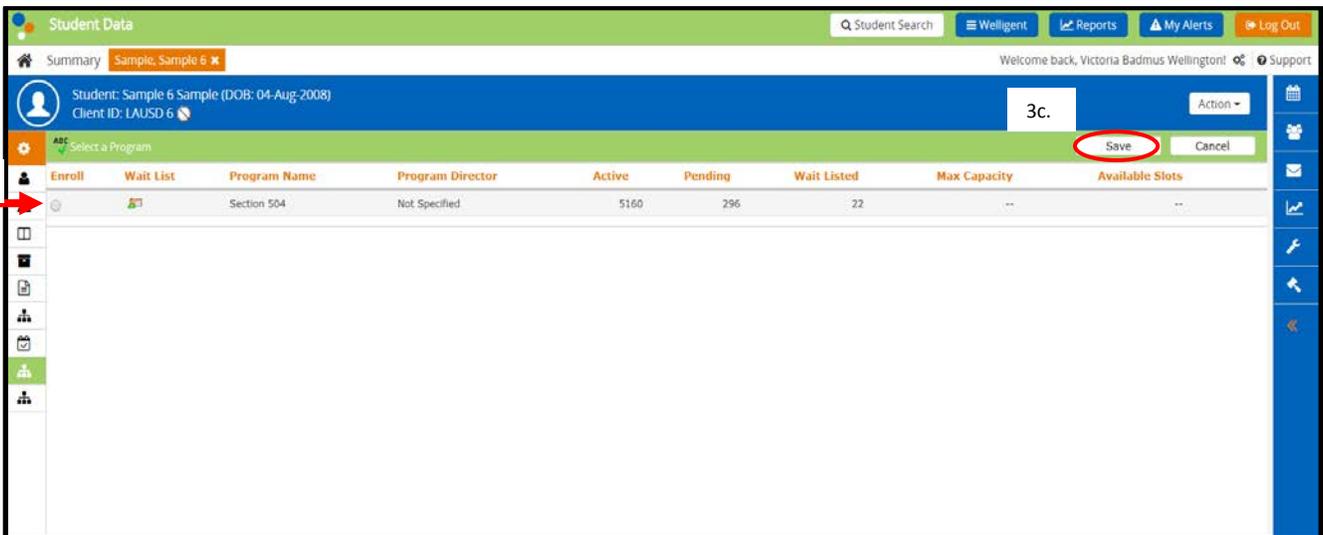


4.  **EDITING THE SECTION 504 STUDENT RECORD**
    a.  Select "Edit" under "Program History"
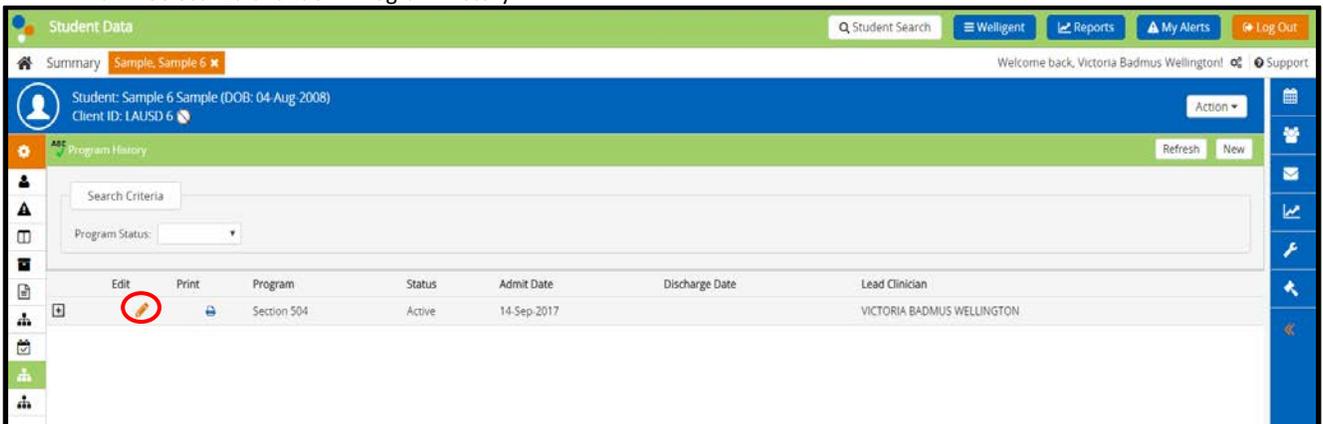
# Welligent Section 504 Program Module Quick Sheet

Attachment B

5. **UPDATING SECTION 504 DETAILS and CREATING FORMS**
   a. Enter information in "Section 504 Details" 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 should pre-populate into the fields; however; if student information does not pre-populate, it is a warning that the information you type will not save so your computer settings may need to be adjusted according to *Welligent ITD Technical Support* (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
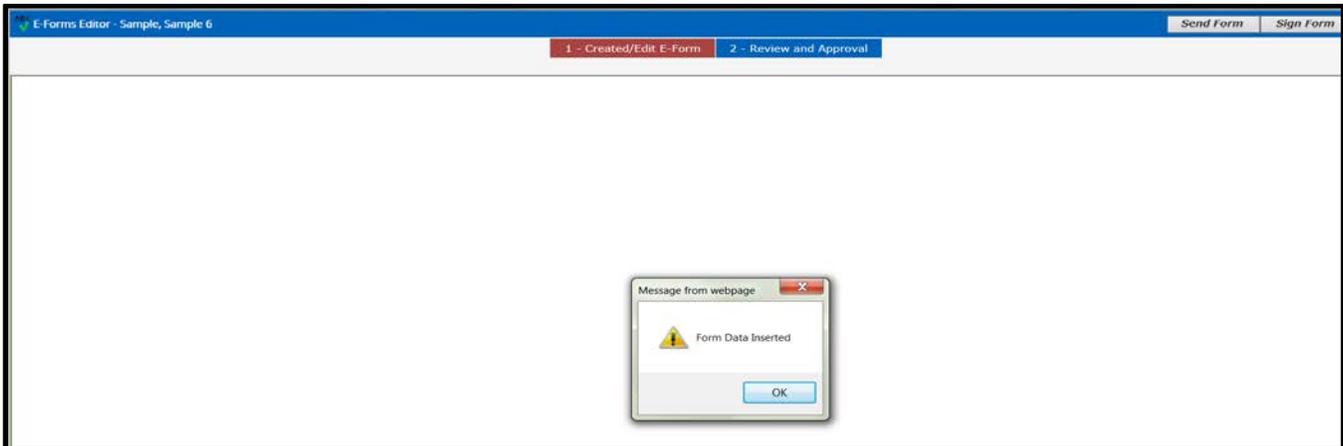


## 6. CREATING FORMS FOR A RE-EVALUATION

a. Click the black plus sign to the left of the green plus sign for the relevant re-evaluation phase
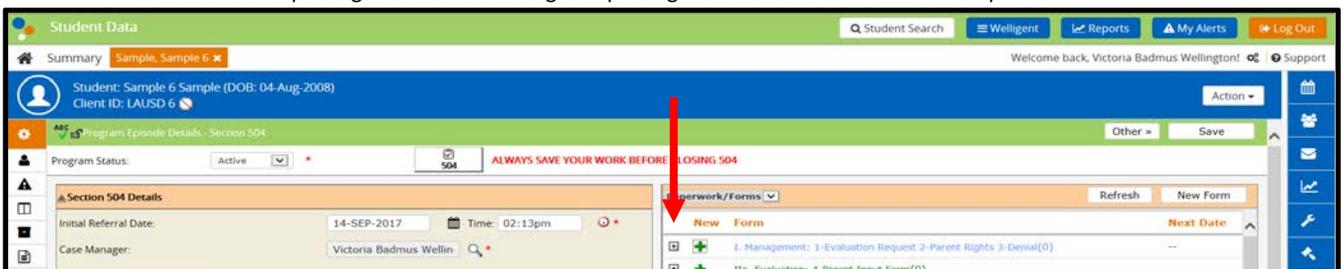
# Welligent Section 504 Program Module Quick Sheet

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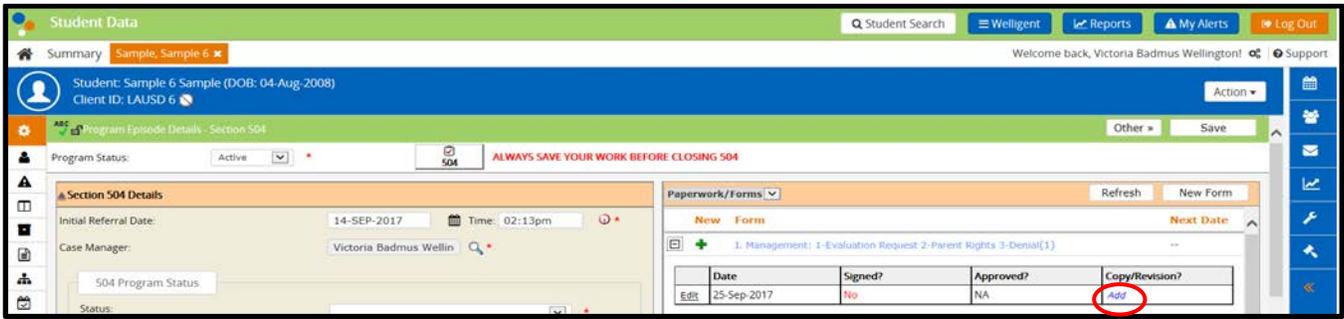


c.    Click "OK" when the following message appears
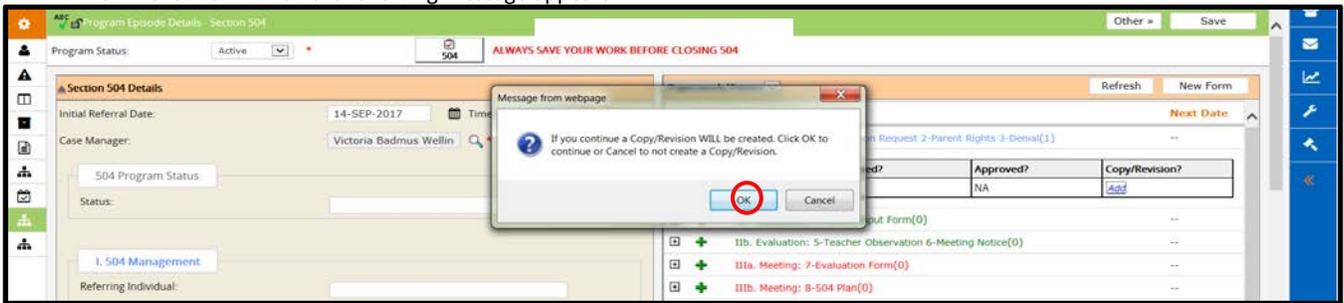


d.    Type the updated information on the form and click "Save Form"
e.    Click "OK" when the confirmation message appears
f.    Click "Close"

6f.
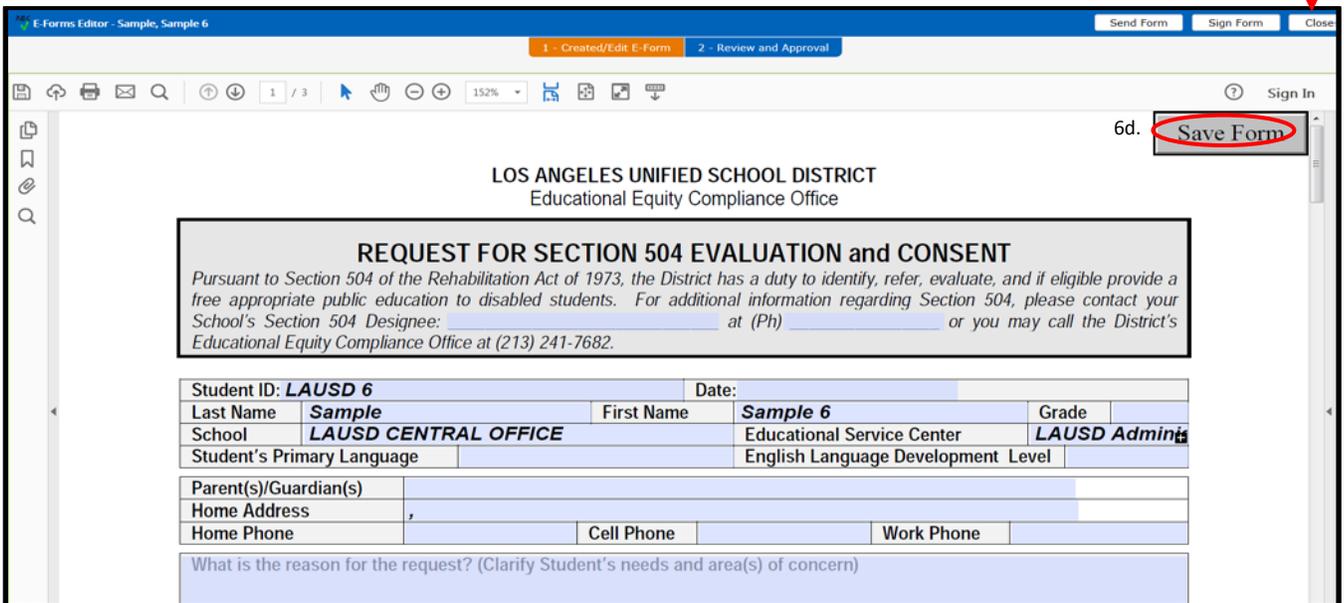


g.    The revised form for the re-evaluation will appear below the previous document
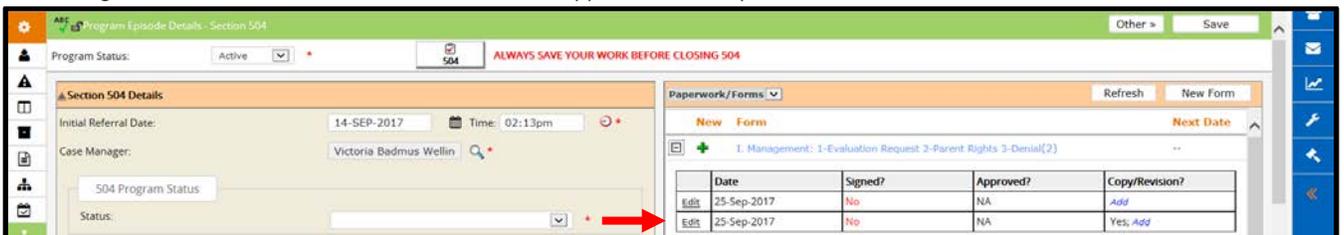
# Welligent Section 504 Program Module Quick Sheet

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"
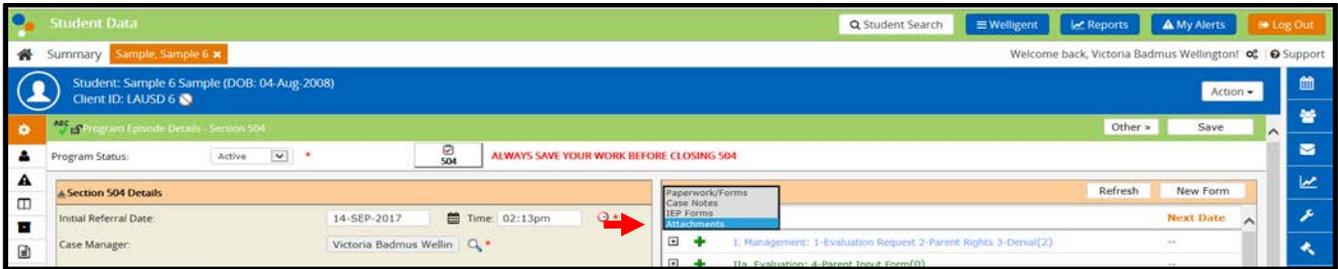


   b. Any previously attached documents will appear in the "Attachments" window
   c. Attach required documents by clicking the "New Attach" button



   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
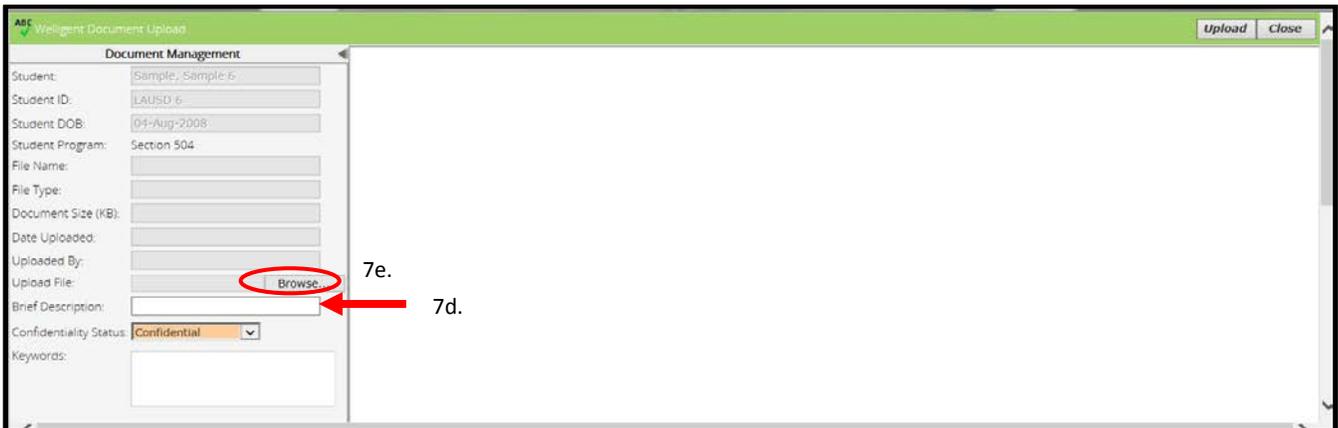
    f.    Locate and select the file to be uploaded

    g.    Click "Open"
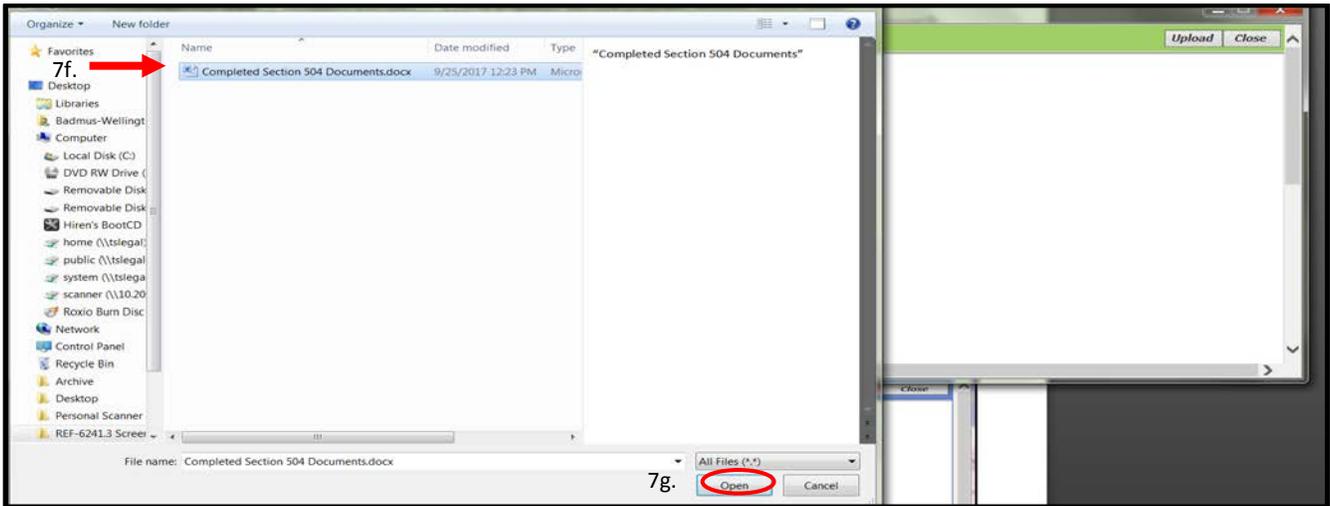


    h.    The file should appear in the "Upload File" field

    i.    Click "Upload"
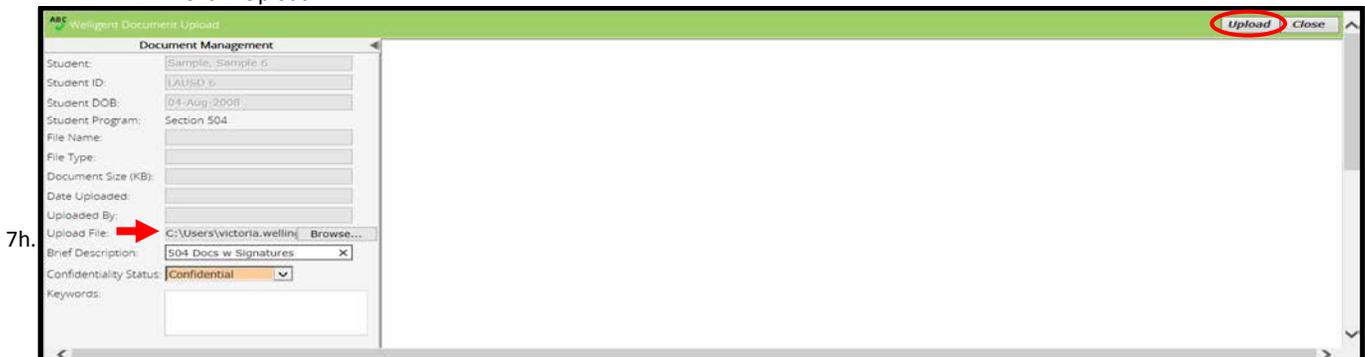


    j.    Once the document is uploaded, a confirmation message should appear

    k.    Click "Okay" to proceed
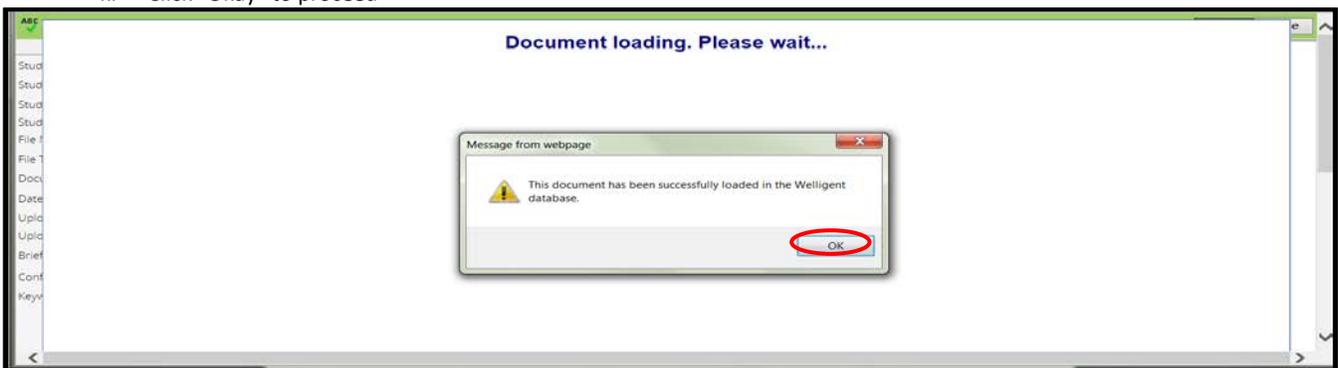
l. After clicking "Okay" if a confirmation window pops up, "select "Save"
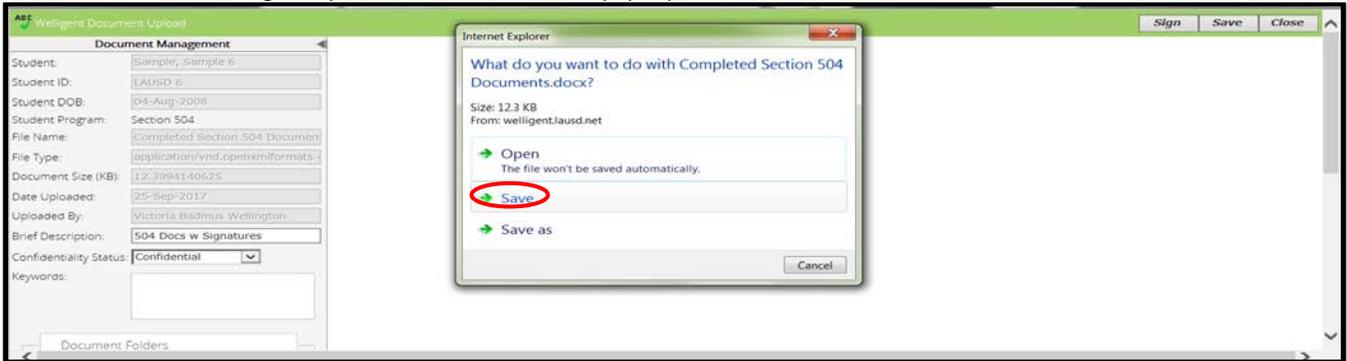


m. If a pop up window appears instead of the attached document, close it by clicking the "x" and then click "Save"
n. Click "Close" to close the window



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



p. Select "Close" to return to the Section 504 Details screen
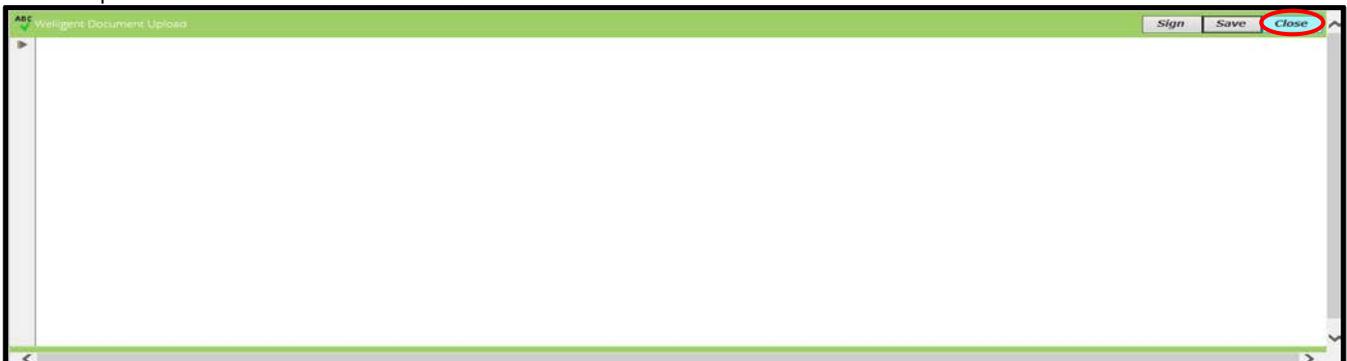
q.  Select "Refresh" and the attached document(s) will appear
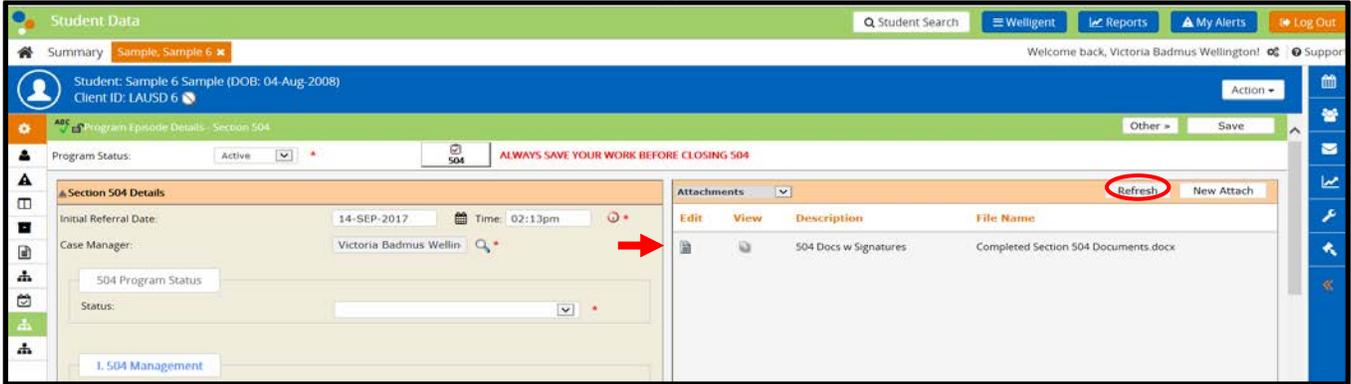


## II.  ADDITIONAL FEATURES

### 8.  RECEIVING SYSTEM ALERTS

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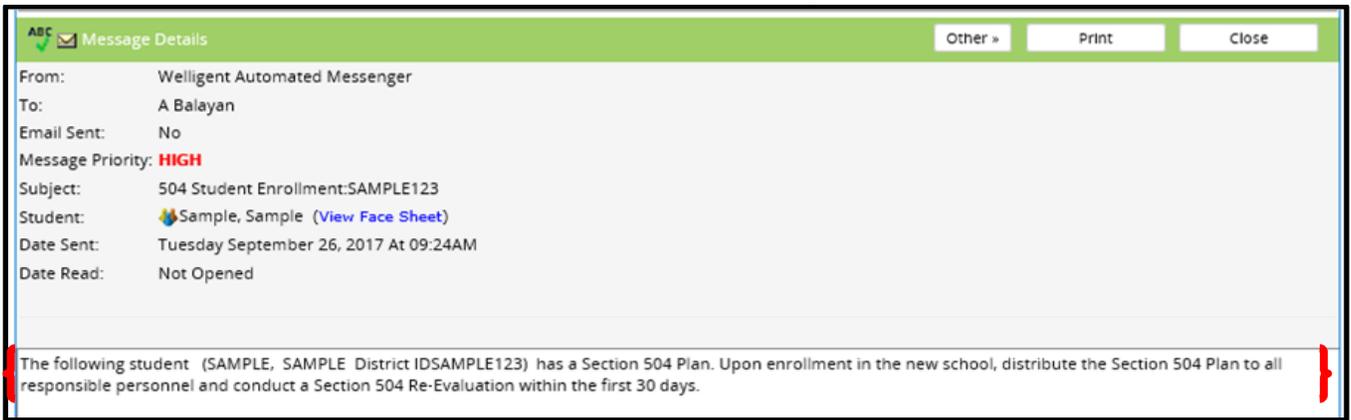


### 9.  DELETING A SECTION 504 FORM (ONLY USE THIS FEATURE WHEN FORMS WERE MISTAKENLY CREATED)

**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
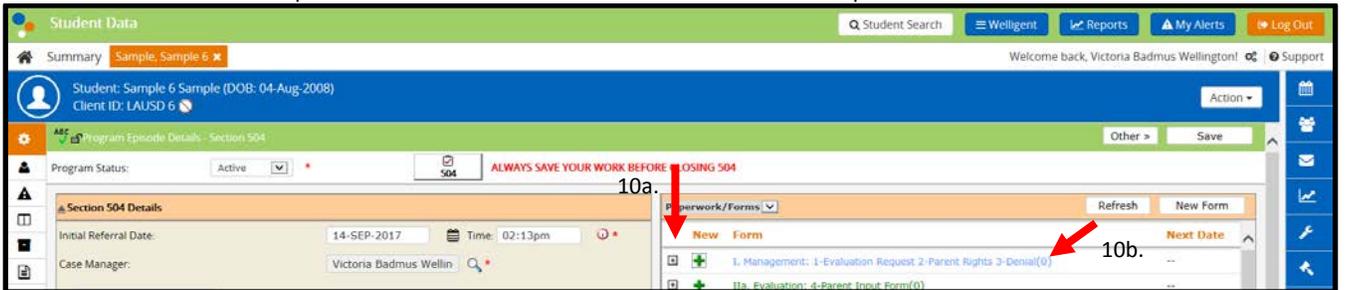
# Welligent Section 504 Program Module Quick Sheet

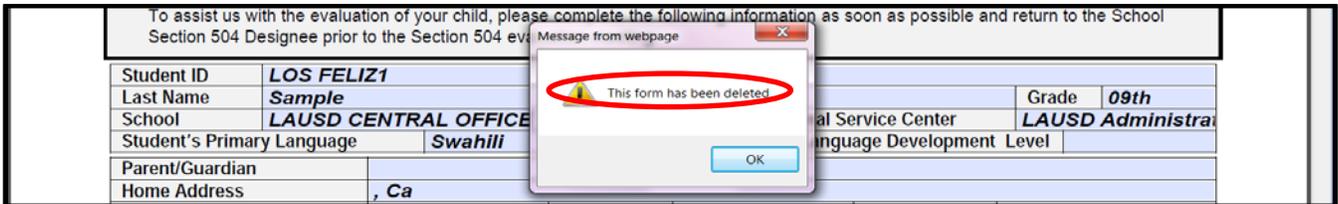c. Upon locating the document/form to be deleted, click "Edit"
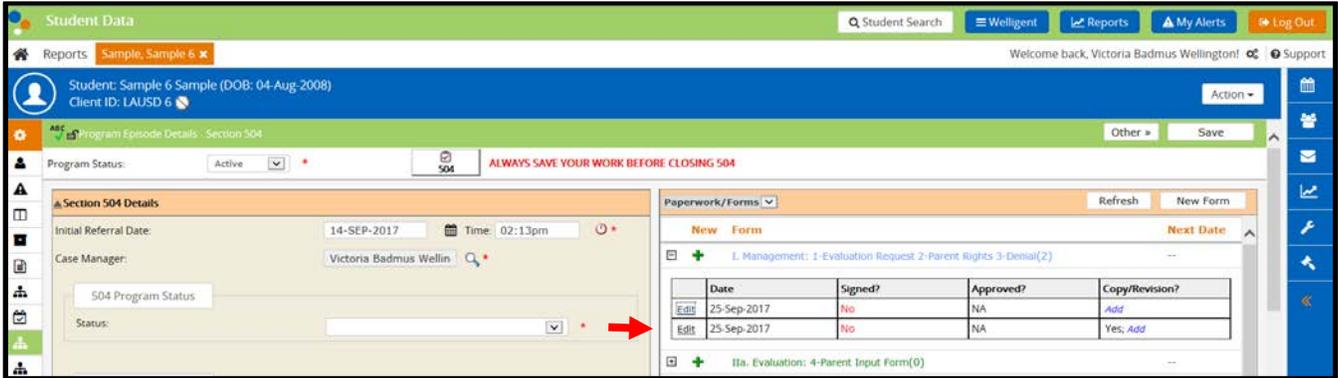


d. Click "Delete"
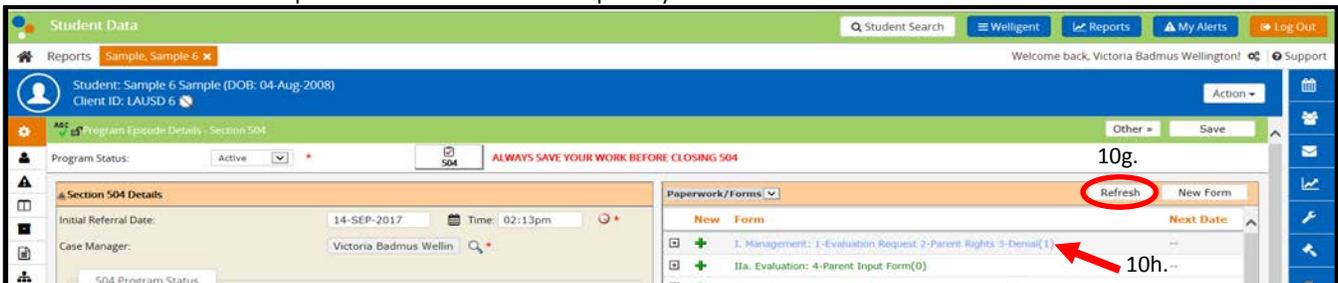e. To delete the form click "OK"

10d.



10e.
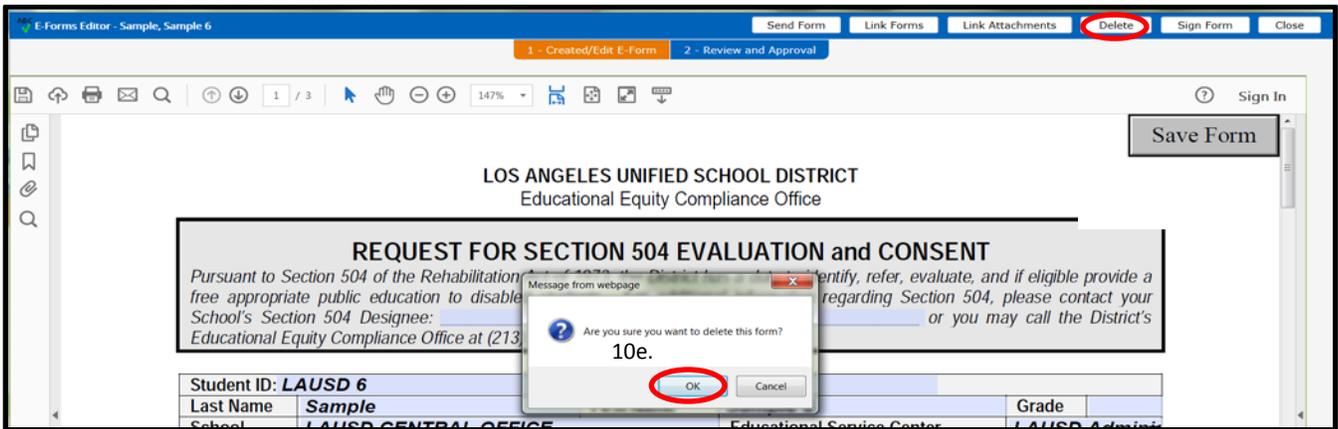
f. Upon deleting the form, a confirmation message should appear. Click "OK"



g. Upon returning to the Student Data window, click the "Refresh" button
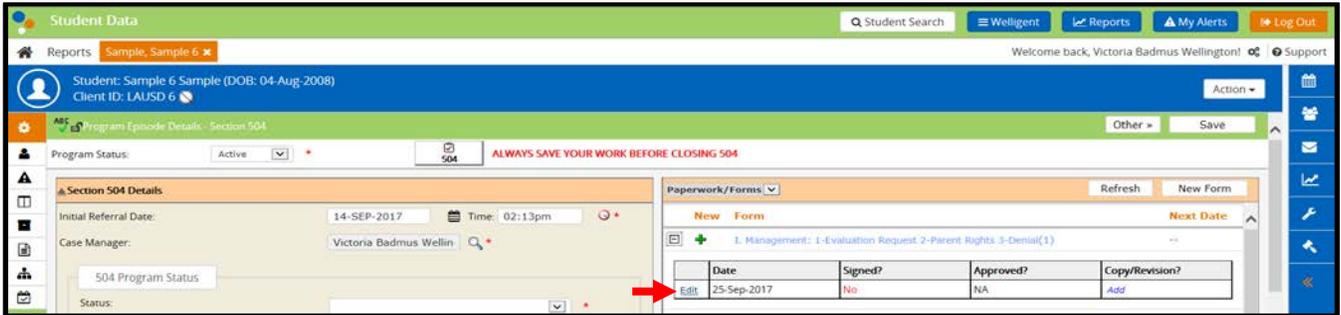h. The number in parenthesis should reflect the quantity of form versions

10g.



10h.

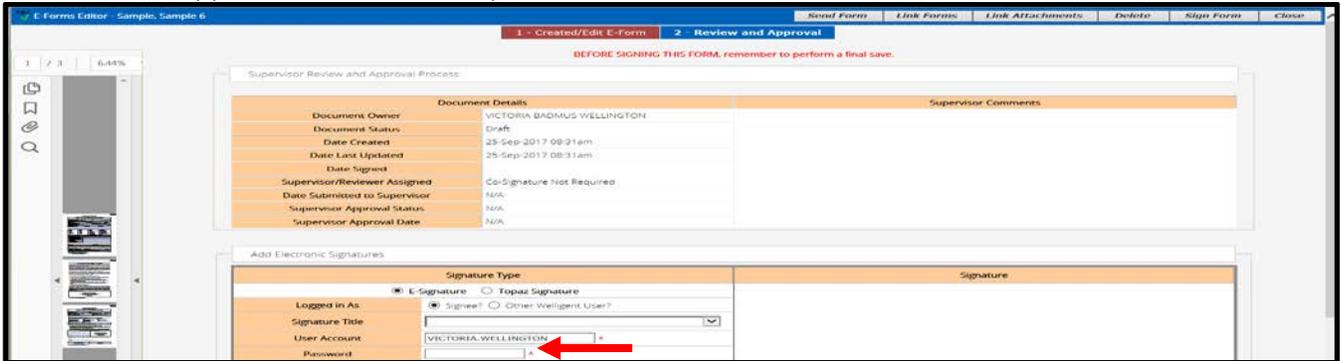# Welligent Section 504 Program Module Quick Sheet

10. **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)**

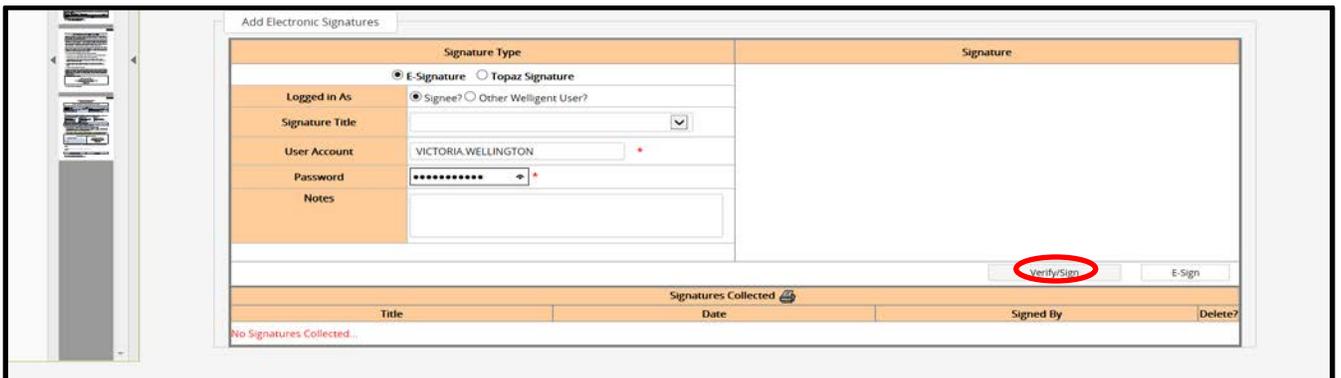    a. Click "Edit" to open the form to be locked



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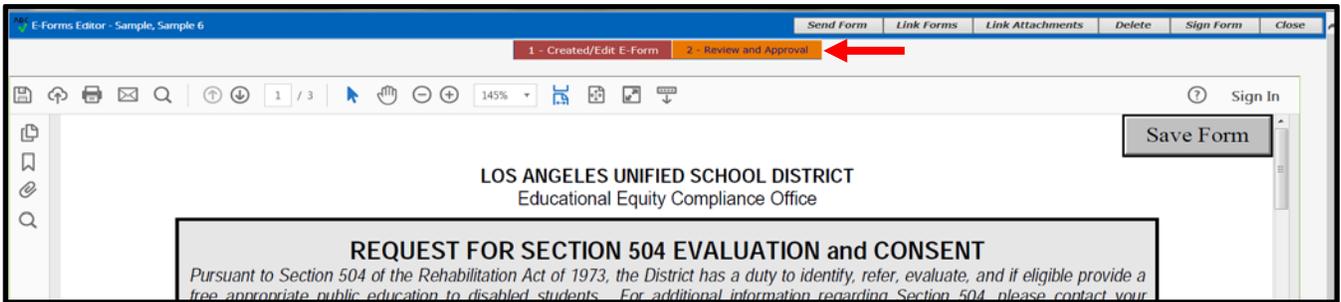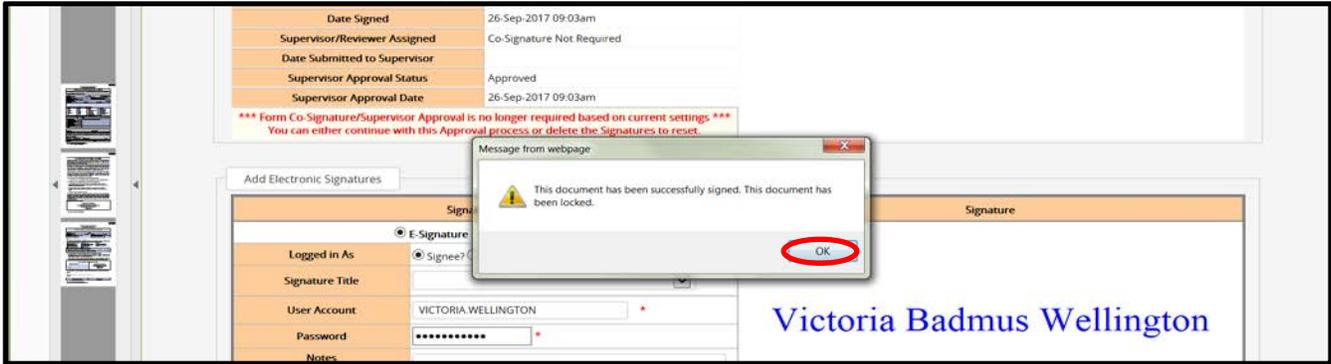


    c. Verify your user account and enter password below
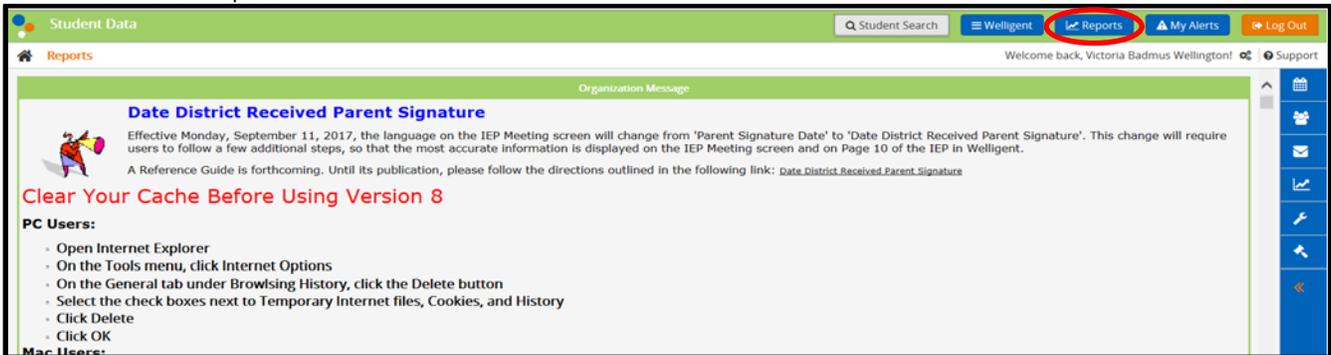


    d. Click "Verify/Sign"

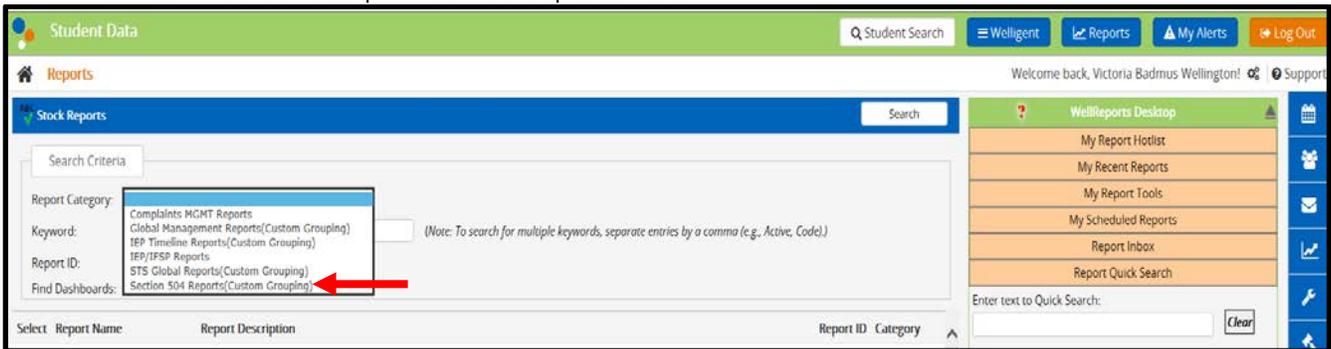e.  When the confirmation message appears, click "OK."



11. **GENERATING A SECTION 504 REPORT**
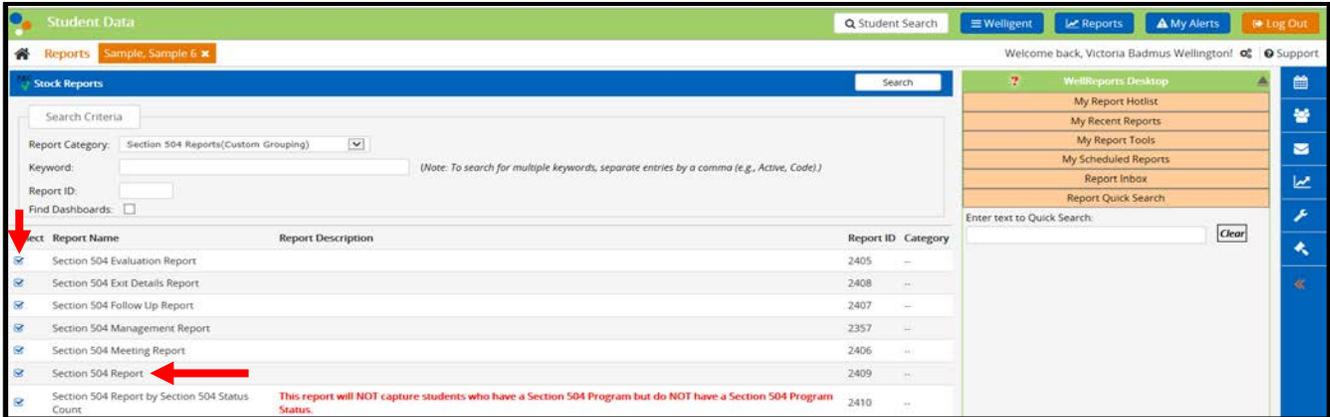
a.  Click "Reports"



b.  Select "Section 504 Reports" from the drop down menu



c.  Select the desired Section 504 report by clicking the corresponding box

# Welligent Section 504 Program Module Quick Sheet

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"