# Referral (Wisconsin)

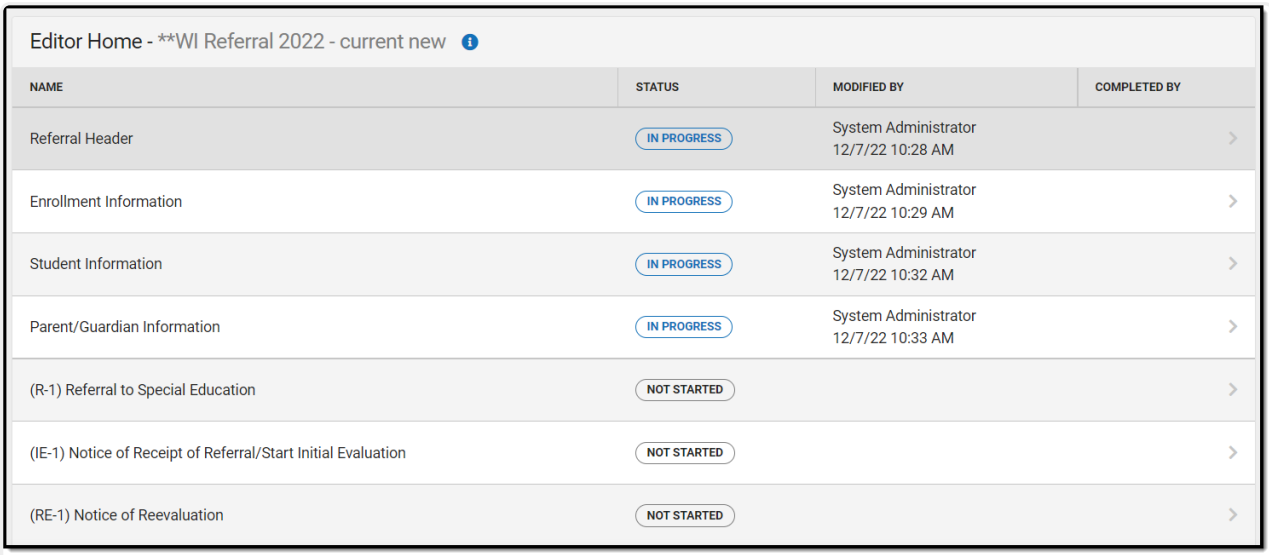
Last Modified on 06/29/2026 10:40 am CDT

Tool Search: Special Ed Documents

Evaluations are used to document the student's educational needs and the student's determination of eligibility for special education. This document describes each editor, the section(s) of the print format that include the entered information, a description of each field on the editor, and any special considerations and instructions for using the editor and fields.

**An evaluation must be created whether or not the student is determined to have a disability.** A copy of the evaluation summary report, including the documentation of eligibility, is given to the student's parents by the school district. For information on general functionality, navigation, and additional plan and evaluation features, see the core Plan and Evaluation Information article.

The current format of this document is the **WI Referral 2023**. Evaluation formats are selected in Eval Types.

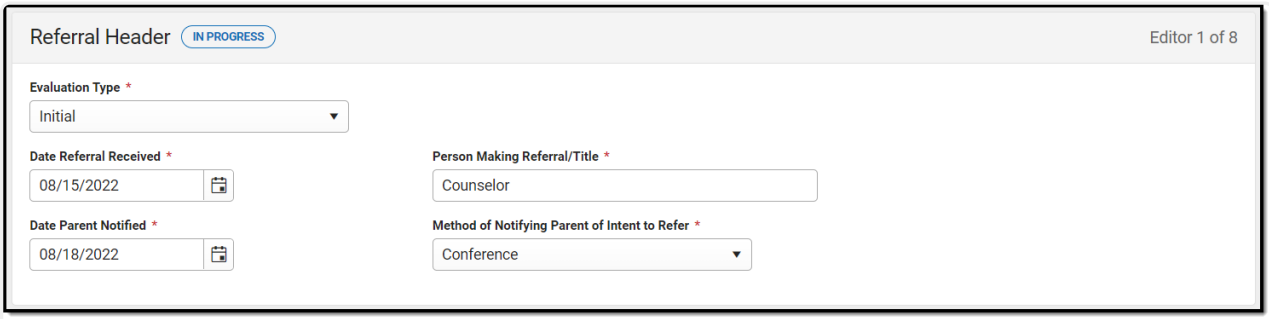



*Editor Home*

# Referral Header

The Referral Header editor lists general information about the referral for special education evaluation.

This editor must be saved before continuing to other parts of the evaluation. Field definitions may vary by district.




*Referral Header Editor*

Click here to expand...

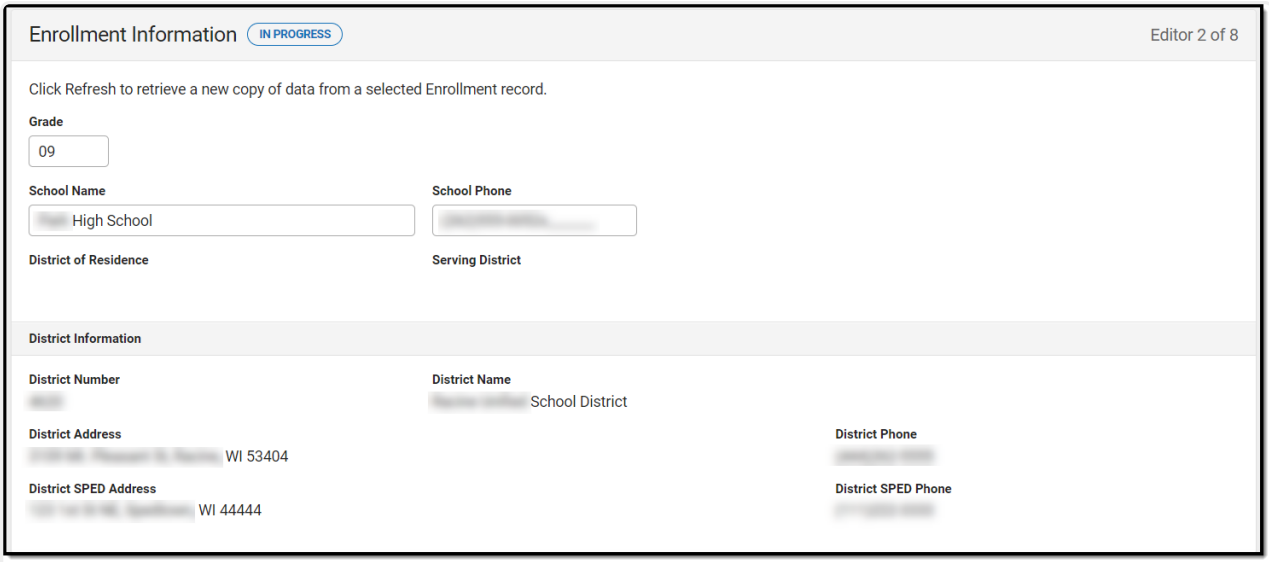
| Field Name | Description | Validation |
|---|---|---|
| **Evaluation Type**<br>*Required* | The type of referral documented. Options include Initial or Reevaluation. | The values available in this dropdown are hard coded. |
| **Date Referral Received**<br>*Required* | The date the school received the referral. | N/A |
| **Person Making Referral / Title**<br>**Required* | The name and title of the person who referred the student. | *This field is only required when Initial is selected as the Evaluation Type.<br><br>**Ad Hoc:** evaluation.personMakingReferral |
| **Date Parent Notified**<br>**Required* | The date the parent/guardian was notified of the intention to refer the student for special education services. | *This field is only required when Initial is selected as the Evaluation Type.<br><br>**Ad Hoc:** The ad hoc field evaluation.dateParentNotified pulls from the Date Parent Notified date from the WI Referral AND the Consent Date field from the WI Eligibility Report. |
| **Method of Notifying Parent of Intent to Refer**<br>**Required* | The manner in which the parent/guardian was notified. Options include:<br>• Conference<br>• Phone Call<br>• Written | *This field is only required when Initial is selected as the Evaluation Type.<br><br>The values available in this dropdown are hard coded.<br><br>**Ad Hoc:** evaluation.methodParentNotified |

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# Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment.

The **Refresh** button retrieves a fresh copy of data from the student's record.




*Enrollment Information Editor*

Click here to expand...

| Field Name | Description | Ad hoc/Database Location | Validation |
|---|---|---|---|
| **Grade** | The student's current grade. | Enrollment > Grade<br><br>enrollment.grade | This field auto-populates from selected Enrollment on Refresh. User can also manually edit the values as needed. |
| **School Name** | The name of the school associated with the student's Enrollment record. | Learner Planning > Learning Plans > servingSchoolName | This field auto-populates from selected Enrollment on Refresh. User can also manually edit the values as needed. |

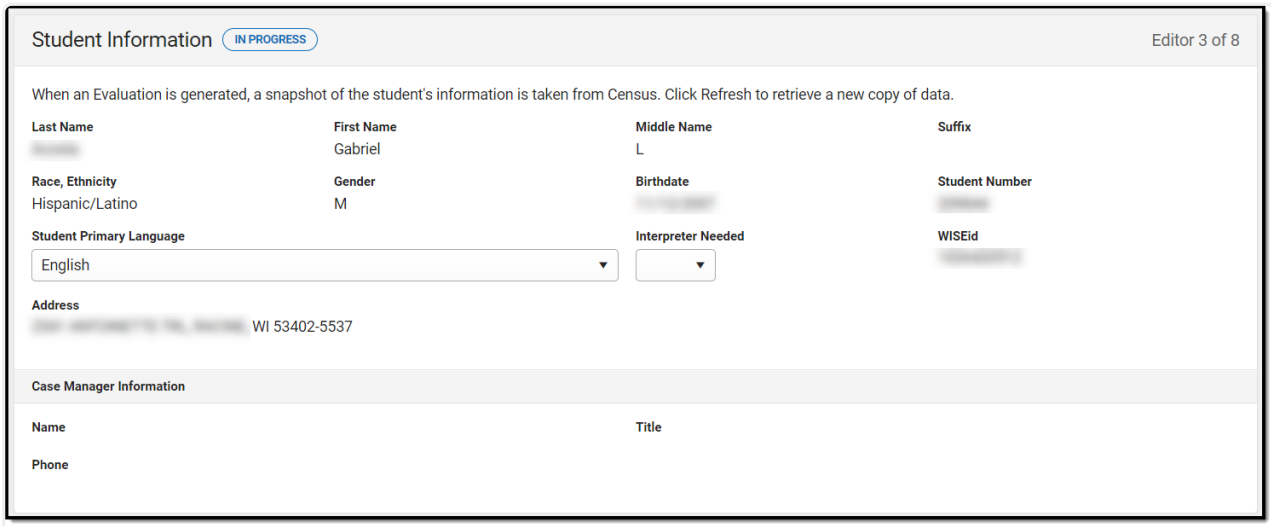
| Field Name | Description | Ad hoc/Database Location | Validation |
|---|---|---|---|
| **School Phone** | The phone number of the school associated with the student's Enrollment record. | N/A | This field auto-populates from selected Enrollment on Refresh from System Administration > Resources > School > (School Name that matches Enrollment record) > Phone. User can also manually edit the values as needed. |
| **District of Residence** | The student's district of residence. | Learner Planning > Learning Plans > residentDistrictNumber | This field is read-only. This field auto-populates from selected Enrollment on Refresh from Enrollment > Resident District. |
| **Serving District** | The student's district of service. | Learner > Active Enrollment > Core > servingDistrict | This field is read-only. This field auto-populates from selected Enrollment on Refresh from Enrollment > Serving District. |
| **District Information**<br>*These fields are read-only.* | | | |
| **District Number** | The district number associated with the Enrolled school. | System Administration > Resources > District Information > State District Number | N/A |
| **District Name** | The district name associated with the Enrolled school. | System Administration > Resources > District Information > Name | N/A |
| **District Address** | The district address associated with the Enrolled school. | System Administration > Resources > District Information > Address | N/A |
| **District Phone** | The district phone number associated with the Enrolled school. | System Administration > Resources > District Information > Phone | N/A |

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# Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record.




*Student Information Editor*

Click here to expand...

| Field | Description | Database Location (when Refresh is clicked) |
|---|---|---|
| **Last Name** | The student's last name. | Census > People > Demographics > Last Name<br><br>identity.lastName |
| **First Name** | The student's first name. | Census > People > Demographics > First Name<br><br>identity.firstName |
| **Middle Name** | The student's middle name. | Census > People > Demographics > Middle Name<br><br>identity.middleName |
| **Suffix** | The student's suffix. | Census > People > Demographics > Suffix Name<br><br>identity.suffix |

| Field | Description | Database Location (when Refresh is clicked) |
|---|---|---|
| **Race, Ethnicity** | The student's state defined race. | Census > People > Demographics > State Race/Ethnicity |
| **Gender** | The student's gender. | Census > People > Demographics > Gender<br><br>identity.gender |
| **Birthdate** | The student's birthdate. | Census > People > Demographics > Birth Date<br><br>identity.birthDate |
| **Student Number** | The student's identification number. | Census > People > Demographics > Student Number<br><br>identity.studentNumber |
| **Student's Primary Language** | The student's first language. | Census > People > Demographics > Primary Language<br><br>identity.homePrimaryLanguage |
| **Interpreter Needed** | Indicates the student requires an interpreter. Options are Yes or No. | N/A |
| **WISEid** | The student's state ID number. | Census > People > Demographics > State ID<br><br>identity.stateID |
| **Student Address** | The student's address.<br><br>This field becomes a dropdown when more than one address exists for the student. The primary household displays by default. | Census > Households > Address Info<br><br>address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip |
| **Case Manager Information**<br>*These fields are read-only.* | | |

| Field | Description | Database Location (when Refresh is clicked) |
|---|---|---|
| **Name** | The first and last name of the team member.<br><br>**Note**: This field auto-populates with the Eval Case Manager Name. When no Eval Case Manager is designated, then the Case Manager Name is pulled in. | Student Information > Special Ed > General > Team Members > Name<br><br>teamMember.firstName<br>teamMember.lastName |
| **Title** | The title of the individual in relation to the special education team membership.<br><br>**Note**: This field auto-populates with the Eval Case Manager Title. When no Eval Case Manager is designated, then the Case Manager Title is pulled in. | Student Information > Special Ed > General > Team Members > Title<br><br>teamMember.title |
| **Phone** | The phone number of the team member.<br><br>**Note**: This field auto-populates with the Eval Case Manager Work Phone. When no Eval Case Manager is designated, then the Case Manager Work Phone is pulled in. | Student Information > Special Ed > General > Team Members > Work Phone<br><br>pcontact.workPhone |

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# Parent/Guardian Information

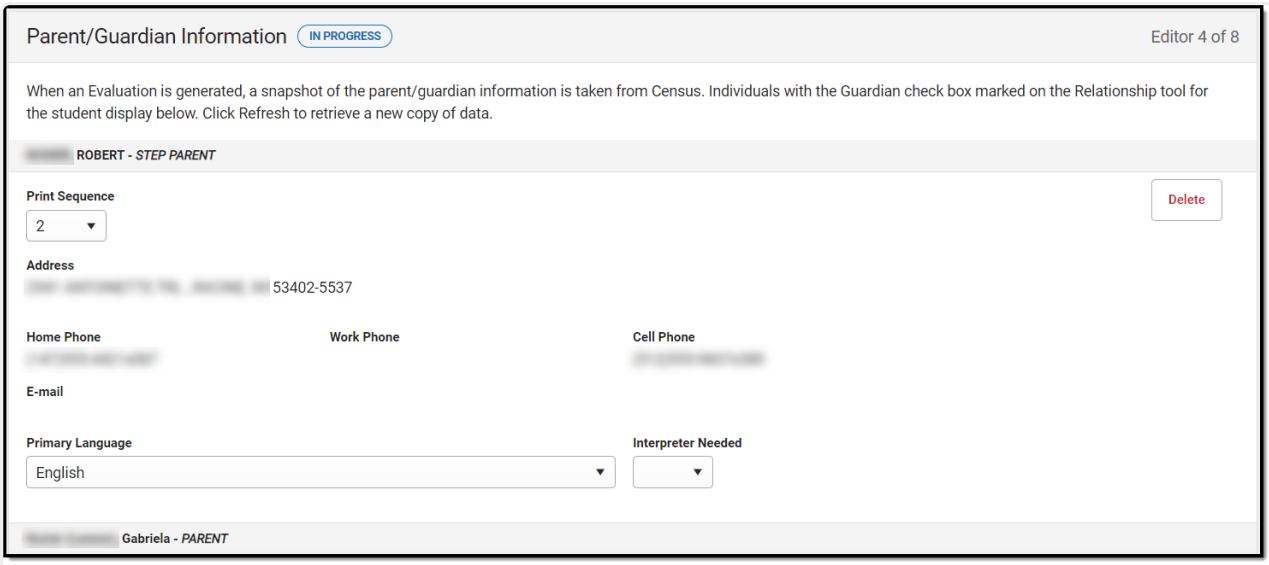
The Parent/Guardian Information editor populates based on the guardian checkbox on the student's Relationships tool. The editor includes Demographics information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

When the **Private Flag** is marked on the Team Members tool for the parent/guardian, all contact information on this editor for that person is cleared out and a note on the editor display, "One or more records has been marked Private in the Team Members Tab. Contact information was not imported for those records and displays as blank below." On the printed document it reads, "Unpublished" in each of those areas.

When the **Educational Surrogate Flag** is marked on the Team Members tool, that person displays on the Parent/Guardian Information editor with "Educational Surrogate Parent" next to their name as the relationship and all other fields are hidden from the screen as well as on the printed document.




*Parent/Guardian Information Editor*

Click here to expand...

| Field | Description | Ad hoc/Location | Validation |
|---|---|---|---|
| **Last Name** | The last name of the parent/guardian. | Census > People > Demographics > Last Name identity.lastName | This field populates from Census. This is part of the header for the parent/guardian. |
| **First Name** | The first name of the parent/guardian. | Census > People > Demographics > First Name identity.firstName | This field populates from Census. This is part of the header for the parent/guardian. |

| Field | Description | Ad hoc/Location | Validation |
|---|---|---|---|
| **Middle Name** | The suffix of the parent/guardian. | Census > People > Demographics > Suffix Name identity.suffix | This field populates from Census. This is part of the header for the parent/guardian. |
| **Suffix** | The suffix of the parent/guardian. | Census > People > Demographics > Suffix Name identity.suffix | This field populates from Census. This is part of the header for the parent/guardian. |
| **Relationship** | The relation of the parent/guardian to the student. | Census > People > Relationships | This field populates from Census. This is part of the header for the parent/guardian. |
| **Print Sequence** | The print order of the parent/guardian(s) on the IEP. | N/A | When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, only parent/guardian(s) with a sequence number prints in the order defined. |

| Field | Description | Ad hoc/Location | Validation |
|---|---|---|---|
| **Address** | The parent/guardians' address. | Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip | This field populates from Census.<br><br>When there are multiple addresses for a person, the drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked Primary. |
| **Home Phone** | The home phone number of the parent/guardian. | Census > People > Demographics > Household Phone | This field populates from Census. |
| **Work Phone** | The work phone of the parent/guardian. | Census > People > Demographics > Work Phone | This field populates from Census. |
| **Cell Phone** | The cell phone of the parent/guardian. | Census > People > Demographics > Cell Phone | This field populates from Census. |
| **Email** | The primary email address for the parent/guardian. | Census > People > Demographics > Email | This field populates from Census. |
| **Primary Language** | The parent/guardian's first language. | Census > People > Demographics > Primary Language<br><br>identity.homePrimaryLanguage | This field populates from Census. |
| **Interpreter Needed** | Indicates the student requires an interpreter. Options are Yes or No. | N/A | The values available in this dropdown are hard coded. |

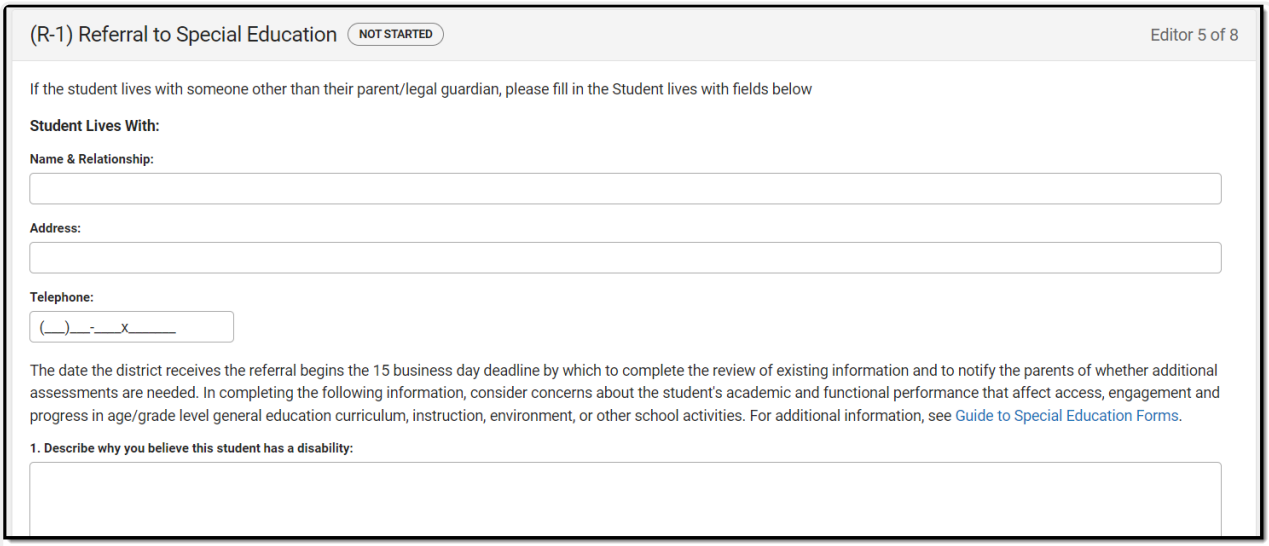
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# (R-1) Referral to Special Education

The Referral to Special Ed editor records why the student was referred to a special education

program and how that information was communicated to the parent/guardian.

When this editor is placed in a Not Needed status, it does NOT display on print. It displays on print when the editor is in a Complete or In Progress status.




*Referral to Special Education Editor*

Click here to expand...

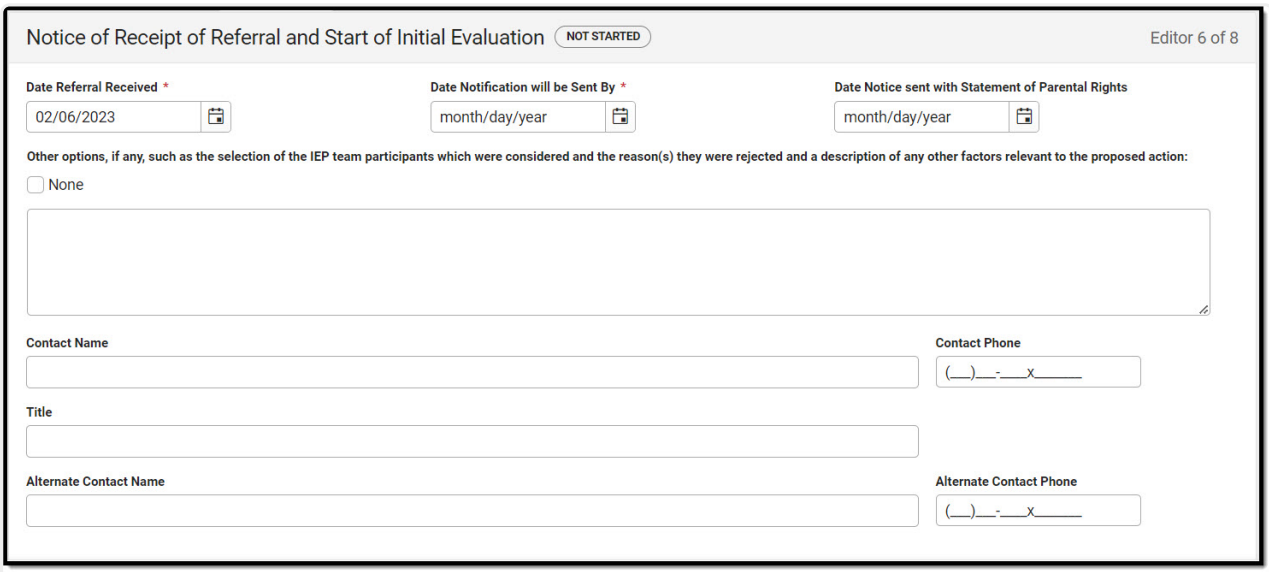
| Field Name | Description | Validation |
|---|---|---|
| **Student Lives With** | | |
| **Name & Relationship** | The name of the person the student lives with and the relationship between them and the student. | N/A |
| **Phone** | The phone number of the person the student lives with. | N/A |
| **Address** | The address where the student lives. | N/A |
| **The date the district receives the referral begins the 15 business day deadline by which to complete the review of existing information and to notify the parents of whether additional assessments are needed. In completing the following information, consider concerns about the student's academic and functional performance that affect access, engagement and progress in age/grade level general education curriculum, instruction, environment, or other school activities. For additional information, see** Guide to Special Education Forms. | | |

| Field Name | Description | Validation |
|---|---|---|
| **1. Describe why you believe this student has a disability** | A description of the criteria used to determine if the student has a disability. | N/A |
| **2. What are your Areas of Concern** | The area of concern for the student's disability. Options include:<br>• Academics/Pre-Academic Delays<br>• Problems with Learning<br>• Behavioral - Emotional Problems<br>• Visual Problem<br>• Communication Problems<br>• Hearing Problems<br>• Physical/Medical Problems<br>• Sensory/Perceptual Skills<br>• Delayed Self-Help Skills<br>• Other | N/A |
| **Specify Other**<br>**Required* | A description of the other area of concern. | *When Other is selected above, this field becomes available and is required. |
| **3. If known, include information about any of the following** | | |
| **a. Early Learning or Academic Achievement** | A description of the student's early learning or academic achievement level. | N/A |
| **b. Functional Performance** | A description of the student's functional performance. | N/A |
| **c. Relevant Medical Information** | A description of the student's medical information as it pertains to their special education needs. | N/A |
| **d. Programs, Services or Interventions that have been used to Address this Student's Needs and the Results of such Interventions** | A description of the interventions provided to the student to address their needs and the results of those interventions. | N/A |

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# (IE-1) Notice of Receipt of Referral/Start Initial Evaluation

The Notice of Receipt or Referral/Start Initial Evaluation editor is used to document the school received a referral for the student and who was involved.




*(IE-1) Notice of Receipt of Referral and Start of Initial Evaluation*

Click here to expand...

| Field Name | Description | Validation |
|---|---|---|
| **Notice of Receipt of Referral and Start of Initial Evaluation** | | |
| **Date Referral Received** *Required* | The date the school received the referral. | This auto-populates with the Date Referral Received from the Referral Header editor.<br><br>**Ad Hoc:** evaluation.dateReferralRecieved |
| **Date Notification will be Sent By** *Required* | The date the notification will be sent to the team members. | N/A |
| **Date Notice sent with Statement of Parental Rights** | The date the notice of the receipt of referral and a statement of the parent/guardian(s) rights was sent. | N/A |

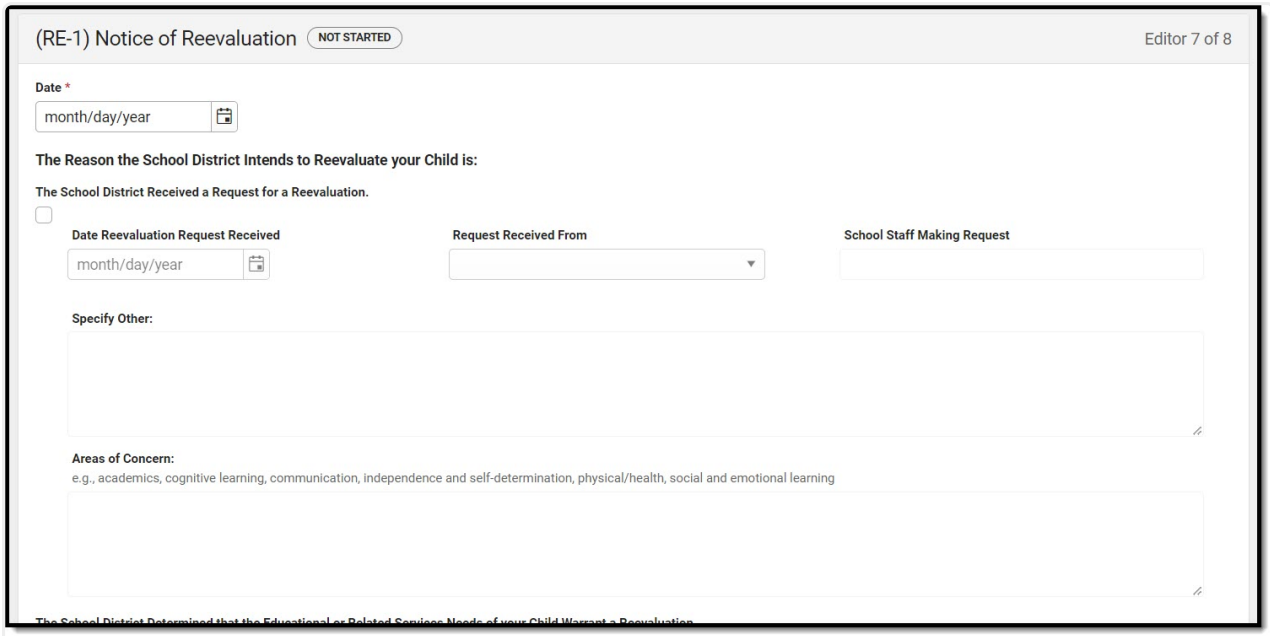
| Field Name | Description | Validation |
|---|---|---|
| **Other options, if any, such as the selection of IEP team participants which were considered and the reason(s) why they were rejected and a description of any other factors relevant to the proposed action** | A description of the IEP team participants, the proposed interventions that were rejected, and any other factors related to the proposed action. | Users can enter text into this area or mark None, which makes this field unavailable. |
| **None** | Indicates no additional options have been identified. | When marked, the text area above becomes unavailable. |
| **Contact Name** | The name of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Contact First Name/SPED Contact Last Name,  but can be modified.<br><br>**Ad Hoc:** evaluation.noticeInitialEvalContactName |
| **Contact Phone** | The phone number of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Phone , but can be modified. |
| **Title** | The title of the special education contact. | N/A |
| **Alternate Contact Name** | The name of the alternate special education contact. | This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Contact First Name/Alternate SPED Contact Last Name, but can be modified. |
| **Alternate Contact Phone** | The phone number of the alternate special education contact. | System Administration > Resources > District Information > District >  Alternate SPED Phone. |
| **Attendance** | | |

| Field Name | Description | Validation |
|---|---|---|
| **First Name**<br>*Required* | The first name of the team member. | This auto-populates from the Team Member tool as is read-only. When Adding a person manually, this is an open text field. |
| **Last Name**<br>*Required* | The last name of the team member. | This auto-populates from the Team Member tool as is read-only. When Adding a person manually, this is an open text field. |
| **Role**<br>*Required* | The role of the team member.<br><br>State Defined values include:<br>• Representative of LEA<br>• Special Education Teacher<br>• Regular Education Teacher<br>• Related Services Personnel<br>• SLD Eval/RTI - Licensed to assess data<br>• SLD Eval/RTI - Licensed to implement interventions<br>• SLD Eval/RTI - Licensed to conduct diagnostic evaluations | State defined values display above district defined values.<br><br>The state defined values are in a locked attribute dictionary, Evaluation.nEvalTMTitleStateDefined.<br><br>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined. |

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# (RE-1) Notice of Reevaluation

The Notice of Reevaluation editor is used to document the ways in which the school was notified of the need to reevaluate the student.




*(RE-1) Notice of Reevaluation Editor*

Click here to expand...

| Field Name | Description | Validation |
|---|---|---|
| **Notice of Reevaluation** | | |
| **Date**<br>*Required* | The date of the notice or reevaluation. | **Ad Hoc:** evaluation.noticeReevalDate |
| **The Reason the School District Intends to Reevaluate your Child is:** | | |
| **The School District Received a Request for a Reevaluation.** | Indicates the school district received a request for reevaluation for the student. | When marked, the two checkboxes, The School District Determined... and Based on when... cannot be selected. |
| **Date Reevaluation Request Received**<br>**Required* | The date the school received the request. | *When the above checkbox is marked, this field is available and required. |
| **Request Received From**<br>**Required* | Who sent the request.<br>Options include:<br>• Parent/Guardian<br>• Child's Teacher<br>• Other | *When the above checkbox is marked, this field is available and required. |
| **School Staff Making Request**<br>**Required* | The name of the staff member submitting the request. | *This field is available and required when Child's Teacher is selected from the Request Received From dropdown. |

| Field Name | Description | Validation |
|---|---|---|
| **Specify Other** **Required* | A description of the other person who sent the request. | When Other is selected above, this field is available and required. |
| **Areas of Concern** | A description of the area(s) of concern to be addressed in the reevaluation. | *When the above checkbox is marked, this field is available and required. |
| **The School District Determined that the Educational or Related Services Needs of your Child Warrant a Reevaluation.** | Indicates the school district determined the need for a reevaluation for the student. | When marked, the two checkboxes, The School District Received... and Based on when... cannot be selected. |
| **Explain / Describe** **Required* | An explanation as to why the school district thinks a reevaluation is warranted. | *When the above checkbox is marked, this field is available and required. |
| **Areas of Concern** **Required* | A description of the area(s) of concern to be addressed in the reevaluation. | *When the above checkbox is marked, this field is available and required. |
| **Based on when the Last Evaluation / Reevaluation of your Child was Completed, a Reevaluation is Due.** | Indicates a reevaluation is due. | When marked, the two checkboxes, The School District Received... and The School District Received... cannot be selected. |
| **Date of Last Evaluation** **Required* | The date the last evaluation for the student took place. | *When the above checkbox is marked, this field is available and required. |

| Field Name | Description | Validation |
| --- | --- | --- |
| **Other options, if any, such as the selection of the IEP team participants which were considered and the reason(s) they were rejected and a description of any other factors relevant to the proposed action:** | A description of the IEP team participants, the proposed interventions that were rejected, and any other factors related to the proposed action. | Users can enter text into this area or mark None, which makes this field unavailable. |
| **None** | Indicates no other options were considered. | When marked, the text area above becomes unavailable. |
| **Notification of this request will be sent within 15 business days of** | Indicates when the notification will be sent. Options include:<br>• The date the district received the request to reevaluate<br>• The date of this notice (request didn't initiate reeval) | The values available in this dropdown are hard coded. |
| **Date Notification will be Sent By** | The date the notification will be sent to the team members. | N/A |

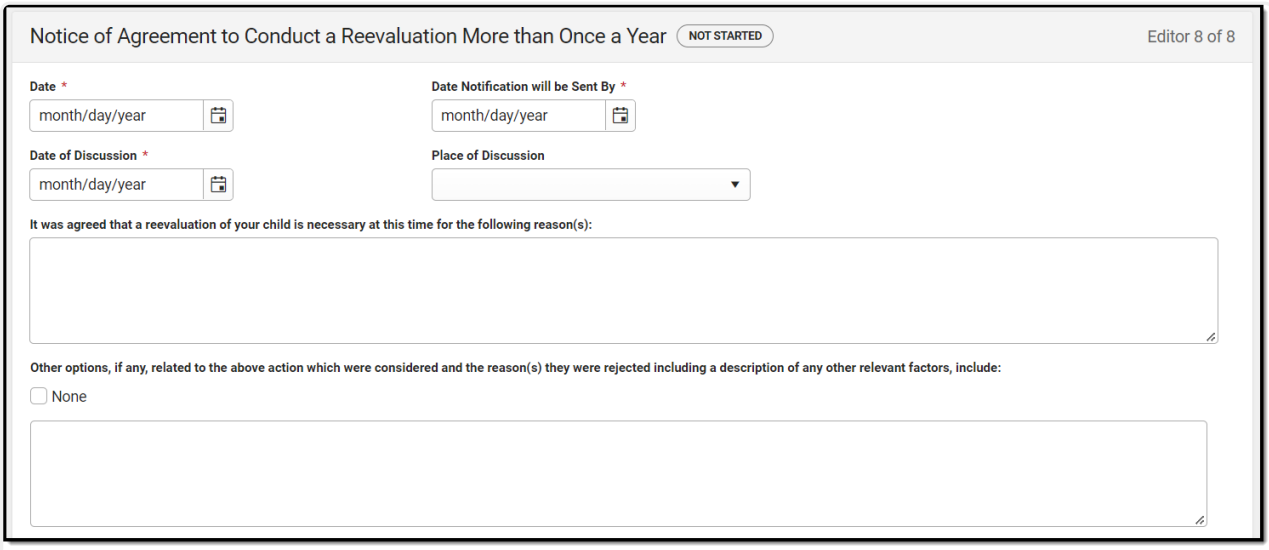
| Field Name | Description | Validation |
| --- | --- | --- |
| **Procedural Safeguards** | A statement for the procedural safeguards. Options include:<br>• You received a copy of your procedural safeguard rights in a brochure about parent and child rights earlier this year. If you would like another copy of this brochure, please contact the district at the telephone number above.<br>• A copy of the parent and child rights brochure is enclosed with this notice. | Only one option may be selected. |
| **Contact Name** | The name of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Contact First Name/SPED Contact Last Name, but can be modified.<br><br>**Ad Hoc:** evaluation.noticeReevalContactName |
| **Contact Phone** | The phone number of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Phone, but can be modified. |
| **Title** | The title of the special education contact. | N/A |
| **Alternative Contact Name** | The name of the alternate special education contact. | This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Contact First Name/Alternate SPED Contact Last Name, but can be modified. |
| **Alternate Contact Phone** | The phone number of the alternate special education contact. | This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Phone, but can be modified. |

| Field Name | Description | Validation |
|---|---|---|
| **Attendance** | | |
| **First Name** *Required* | The first name of the team member. | This auto-populates from the Team Member tool as is read-only. When Adding a person manually, this is an open text field. |
| **Last Name** *Required* | The last name of the team member. | This auto-populates from the Team Member tool as is read-only. When Adding a person manually, this is an open text field. |
| **Role Name** *Required* | The role of the team member.<br><br>State Defined values include:<br>• Representative of LEA<br>• Special Education Teacher<br>• Regular Education Teacher<br>• Related Services Personnel | State defined values display above district defined values.<br><br>The state defined values are in a locked attribute dictionary, Evaluation.nReEvalTMTitleStateDefined.<br><br>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined. |

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# (RE-2) Notice of Additional Reevaluation

The Notice of Additional Reevaluation editor is used to document the need to reevaluate the student more than once a year.




*Notice of Additional Reevaluation Editor*

Click here to expand...

| Field Name | Description | Validation |
|---|---|---|
| **Notice of Agreement to Conduct a Reevaluation More than Once a Year** | | |
| **Date**<br>*Required* | The date the notice of agreement to conduct a reevaluation for the student more than once per year was sent. | **Ad Hoc:** evaluation.noticeAddReevalDate |
| **Date Notification will be Sent By**<br>*Required* | The Date on which the notification of determination will be sent to the Parent/Guardian. | N/A |
| **Date of Discussion**<br>*Required* | The date the IEP discussed the agreement. | N/A |
| **Place of Discussion** | The location of the discussion. Options include:<br>• Met in Person<br>• Spoke on the Phone<br>• Exchanged Emails | The values available in this dropdown are hard coded. |
| **It was agreed that a reevaluation of your child is necessary at this time for the following reason(s):** | A description of the reasons a reevaluation of the student is necessary. | N/A |

| Field Name | Description | Validation |
| --- | --- | --- |
| **Other options, if any, related to the above action which were considered and the reason(s) they were rejected including a description of any other relevant factors, include** | A description of the IEP team participants, the proposed interventions that were rejected, and any other relevant factors. | Users can enter text into this area or mark None, which makes this field unavailable. |
| **None** | Indicates other options were not considered. | When marked, the text area above becomes unavailable. |
| **Other options, if any, related to the selection of IEP team participants which were considered and the reason(s) they were rejected and a description of any other factors relevant to the proposed action** | A description of the IEP team participants, the proposed interventions that were rejected, and any other factors related to the proposed action. | Users can enter text into this area or mark None, which makes this field unavailable. |
| **None** | Indicates other options were not considered. | When marked, the text area above becomes unavailable. |
| **Contact Name** | The name of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Contact First Name/SPED Contact Last Name, but can be modified.<br><br>**Ad hoc:** evaluation.noticeAddReevalContactName |

| Field Name | Description | Validation |
|---|---|---|
| **Contact Phone** | The phone number of the special education contact. | This auto-populates from System Administration > Resources > District Information > District > SPED Phone, but can be modified. |
| **Title** | The title of the special education contact. | N/A |
| **Alternative Contact Name** | The name of the alternate special education contact. | This auto-populates from System Administration > Resources > District Information > District > Alternate SPED Contact First Name/Alternate SPED Contact Last Name, but can be modified. |
| **Alternate Contact Phone** | The phone number of the alternate special education contact. | Auto-populates from System Administration > Resources > District Information > District > Alternate SPED Phone, but can be modified. |
| **Attendance** | | |
| **First Name** *Required* | The first name of the team member. | This field is required. Pulls in from Team Members Tool as Read Only or is an open text field when Add button is used. |
| **Last Name** *Required* | The last name of the team member. | This field is required. Pulls in from Team Members tool as Read Only or is an open text field when Add button is used. |
| **Role Name** *Required* | The role of the team member.<br><br>State Defined values include:<br>• Representative of LEA<br>• Special Education Teacher<br>• Regular Education Teacher<br>• Related Services Personnel | State defined values display above district defined values.<br><br>The state defined values are in a locked attribute dictionary, Evaluation.nReEvalTMTitleStateDefined.<br><br>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined. |

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