

Referral (Wisconsin)

Last Modified on 03/11/2024 8:45 am CDT

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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.

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

Editor Home - **WI Referral 2022 - current new ⓘ

NAME	STATUS	MODIFIED BY	COMPLETED BY
Referral Header	IN PROGRESS	System Administrator 12/7/22 10:28 AM	>
Enrollment Information	IN PROGRESS	System Administrator 12/7/22 10:29 AM	>
Student Information	IN PROGRESS	System Administrator 12/7/22 10:32 AM	>
Parent/Guardian Information	IN PROGRESS	System Administrator 12/7/22 10:33 AM	>
(R-1) Referral to Special Education	NOT STARTED		>
(IE-1) Notice of Receipt of Referral/Start Initial Evaluation	NOT STARTED		>
(RE-1) Notice of Reevaluation	NOT STARTED		>

Editor Home

Editor Home

The Editor Home lists the editors available, their status, and Modification and Completion information.

Header	Description
Name	The name of the editor.
Status	<p>The state of the editor. Statuses can be:</p> <ul style="list-style-type: none"> • In Progress indicates a user has entered and saved data in that editor. • Not Started is the default status for all editors. • Complete indicates a user has clicked the Complete button on the editor and the editor is read only. This does not lock the editor from further editing, but indicates the user considers the editor to be finished. • Not Needed indicates a user has clicked the Not Needed button on the editor. This is usually done for editors that do not apply to the student. <p>The following statuses are only available for the Nevada IEP:</p> <ul style="list-style-type: none"> • ESign indicates that editor has functionality related to the eSignature process. See the Nevada Individual Education Plan eSignature Process for additional information. • Complete Pending eSignature indicates the plan has been entered and sent via the Campus Parent portal to the student's guardian for eSignature.
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the Complete button for that editor.

General Information

The following table lists the actions available for the editors. When resizing the window, certain buttons are condensed into a single **Action** button.

Button	Description
Save	<p>Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> • Save captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • Save & Stay captures progress and keeps the user on the current editor. This save button is the default save option and usually found within the detail screen or list editors, such as Goals and Objectives. • Save & Next captures progress and navigates the user to the next editor. • Save & New captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Type section for additional information.

Button	Description
Refresh	<p>Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted people records. Manually entered fields do not change when the refresh button is clicked. The user must Save after clicking Refresh to capture changes.</p> <p>A side panel displays listing all applicable Enrollment records for the student. See the Enrollments tool documentation for additional information.</p>
Cancel	Navigates the user to the Editor Home screen or to the List Screen for List editors.
Status	<p>Changes the status of the editor.</p> <ul style="list-style-type: none"> • Complete indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. To further edit after an editor is marked Complete, the user must click In Progress. • Not Needed indicates the editor does not apply to the student's plan or evaluation. This makes the editor read only. However, this does not lock the editor from further editing. To further edit after an editor is marked Not Needed, click the In Progress button. • In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made. <p>The following status is only available for the Nevada IEP:</p> <ul style="list-style-type: none"> • Complete Pending eSignature only displays for the Procedural Safeguards, IEP Implementation, and Medicaid Consent editors. This button marks the editor as complete until the parent/guardian electronically signs those sections of the plan via the Campus Parent Portal. See the Nevada Individual Education Plan eSignature Process for additional information.
Print	Prints the entire document.
Editors	Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click Close to collapse the side panel.
Previous	Navigates the user to the previous editor.
Next	Navigates the user to the next editor.

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor display. List editors display a list of all records within that editor. Clicking an existing record or the New button opens the detail view for an individual record.

Editor Lock Out and Release Logic

Only one user at a time can actively work on an editor. A person with a padlock icon  displays in

the Editors side panel, Editor Home, and List Screen of list editors indicating which editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

Editors that are currently being edited are read-only for all other users. The name of the person working on the editor displays in the header.

In order to release an editor, the user must:

- navigate to the next editor by clicking **Save and Next**, or by clicking the **Editors** button and selecting the next editor from the side panel.
- click the **Cancel** button to return to the Editor Home screen.
- log out of the Campus application.
- navigate to a different tool in the Campus application.

Editors are automatically released when the in-application timeout limit has been exceeded. This is a back-end process and is usually around 30-60 minutes.

Template Banks

Certain fields within several editors have an **Add Template** icon that displays next to their name. Clicking this button displays a side panel with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Categories	Sequence	Selected Template Bank Values
+ Course of Study English (4 Templates)		No records selected.
+ Course of Study Math (4 Templates)		

Template Bank Side Panel

Click the plus (+) icons next to the category to view the available template values.

Template Banks

Categories	Sequence	Selected Template Bank Values										
- Course of Study English (4 Templates) <table border="1"> <thead> <tr> <th>Add</th> <th>Templates</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 10 Grade 10: English 200</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 11 Grade 11: English 300</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 12 Grade 12: English 400</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 9 Grade 9: English 100</td> </tr> </tbody> </table>	Add	Templates	<input type="button" value="Add"/>	Course of Study 10 Grade 10: English 200	<input type="button" value="Add"/>	Course of Study 11 Grade 11: English 300	<input type="button" value="Add"/>	Course of Study 12 Grade 12: English 400	<input type="button" value="Add"/>	Course of Study 9 Grade 9: English 100	1 <input type="button" value="▲"/> <input type="button" value="▼"/> 2 <input type="button" value="▲"/> <input type="button" value="▼"/> 3 <input type="button" value="▲"/> <input type="button" value="▼"/> 4 <input type="button" value="▲"/> <input type="button" value="▼"/>	Course of Study 9 <input type="button" value="X"/> Grade 9: English 100 Course of Study 10 <input type="button" value="X"/> Grade 10: English 200 Course of Study 11 <input type="button" value="X"/> Grade 11: English 300 Course of Study 12 <input type="button" value="X"/> Grade 12: English 400
Add	Templates											
<input type="button" value="Add"/>	Course of Study 10 Grade 10: English 200											
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<input type="button" value="Add"/>	Course of Study 12 Grade 12: English 400											
<input type="button" value="Add"/>	Course of Study 9 Grade 9: English 100											
+ Course of Study Math (4 Templates)												

Expanded Category and Values Selected

Template Bank Categories display on the left and the selected text displays on the right. Click the **Add** button to add the template value. This adds the template to the queue of values on the right. The red **X** removes selected templates while the sequence field can be used to reorder the templates. Another option is to use the up and down arrows next to the sequence field to reorder values.

Click **Cancel** to go back to the document. The **Clear Selected Template(s)** button removes all selected template values from the right selection screen.

Once selections are finalized, click the **Insert Selected Template(s)** button to add the values to the field within the document in the selected order. Template values are separated by carriage returns.

Courses of Study:

Grade 9: English 100

Grade 10: English 200

Grade 11: English 300

Grade 12: English 400

Example Template Bank Selections in the Document

Text Editors

Images should not be inserted into text fields.

Editors

[Referral Header](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | (R-1) [Referral to Special Education](#) | (IE-1) [Notice of Receipt of Referral/Start Initial Evaluation](#) | (RE-1) [Notice of Reevaluation](#) | (RE-2) [Notice of Additional Reevaluation](#)

The following section lists each editor and describes each field on the editor.

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 IN PROGRESS
Editor 1 of 8

Evaluation Type *	<input type="text" value="Initial"/>	Person Making Referral/Title *	
Date Referral Received *	<input type="text" value="08/15/2022"/>	<input type="text" value="Counselor"/>	
Date Parent Notified *	<input type="text" value="08/18/2022"/>	Method of Notifying Parent of Intent to Refer *	<input type="text" value="Conference"/>

Referral Header Editor

[▶ Click here to expand...](#)

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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 IN PROGRESS
Editor 2 of 8

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

Grade

School Name **School Phone**

District of Residence **Serving District**

District Information

District Number **District Name**

District Address **District Phone**

District SPED Address **District SPED Phone**

Enrollment Information Editor

▶ [Click here to expand...](#)

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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 IN PROGRESS
Editor 3 of 8

When an Evaluation is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name <input type="text"/>	First Name Gabriel	Middle Name L	Suffix <input type="text"/>
Race, Ethnicity Hispanic/Latino	Gender M	Birthdate <input type="text"/>	Student Number <input type="text"/>
Student Primary Language <input type="text" value="English"/>	Interpreter Needed <input type="text"/>	WISEid <input type="text"/>	
Address <input type="text" value="WI 53402-5537"/>			

Case Manager Information

Name <input type="text"/>	Title <input type="text"/>
Phone <input type="text"/>	

Student Information Editor

▶ [Click here to expand...](#)

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 IN PROGRESS
Editor 4 of 8

When an Evaluation is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian check box marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

ROBERT - STEP PARENT
Delete

Print Sequence

Address

Home Phone <input style="width: 90%;" type="text"/>	Work Phone <input style="width: 90%;" type="text"/>	Cell Phone <input style="width: 90%;" type="text"/>
E-mail <input style="width: 100%;" type="text"/>		

Primary Language

Interpreter Needed

Gabriela - PARENT

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

(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.

(R-1) Referral to Special Education NOT STARTED
Editor 5 of 8

If the student lives with someone other than their parent/legal guardian, please fill in the Student lives with fields below

Student Lives With:

Name & Relationship:

Address:

Telephone:

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](#).

1. Describe why you believe this student has a disability:

Referral to Special Education Editor

▶ [Click here to expand...](#)

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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.

Notice of Receipt of Referral and Start of Initial Evaluation NOT STARTED Editor 6 of 8

Date Referral Received *

Date Notification will be Sent By *

Date Notice sent with Statement of Parental Rights

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:

None

Contact Name

Contact Phone

Title

Alternate Contact Name

Alternate Contact Phone

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

▶ [Click here to expand...](#)

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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 NOT STARTED Editor 7 of 8

Date *

The Reason the School District Intends to Reevaluate your Child is:

The School District Received a Request for a Reevaluation.

Date Reevaluation Request Received

Request Received From

School Staff Making Request

Specify Other:

Areas of Concern:
e.g., academics, cognitive learning, communication, independence and self-determination, physical/health, social and emotional learning

(RE-1) Notice of Reevaluation Editor

▶ [Click here to expand...](#)

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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 Agreement to Conduct a Reevaluation More than Once a Year
NOT STARTED
Editor 8 of 8

Date *

Date Notification will be Sent By *

Date of Discussion *

Place of Discussion

It was agreed that a reevaluation of your child is necessary at this time for the following reason(s):

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:

None

Notice of Additional Reevaluation Editor

[▶ Click here to expand...](#)

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Previous Versions

[Referral \(Wisconsin\) \[.2335 - .2339\]](#)

[Referral \(Wisconsin\) \[.2251 - .2331\]](#)

[Referral \(Wisconsin\) \[.2231 - .2247\]](#)