

Referral (Wisconsin) [.2251 - .2331]

Last Modified on 05/08/2024 9:38 am CDT

You are viewing a previous version of this article. See [Referral \(Wisconsin\)](#) for the most current information.

[Editor Home](#) | [General Evaluation Information](#) | [Editor Types](#) | [Padlock Icon](#) | [Template Banks](#) | [Editors](#) | [Classic View](#)

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 2022**. Evaluation formats are selected in [Eval Types](#).

Editor Home

The Editor Home lists the editors available on the student's Evaluation and the Modification and Completion information.

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

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

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. 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.
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 Evaluation Information

The following table lists the buttons available for the editors:

Button	Description
--------	-------------


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 of 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 Types section for additional information.
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 <i>i.e.</i> <i>Complete,</i> <i>Not</i> <i>Needed,</i> <i>etc.</i>	<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 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.
Print	Prints the entire evaluation.
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.

Padlock Icon

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. Once the editing user navigates away from an editor, that editor becomes available for others to work on.

Template Banks

Certain fields within several editors have a paper icon  displays next to their name. When the icon is clicked, a side panel displays with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Editors

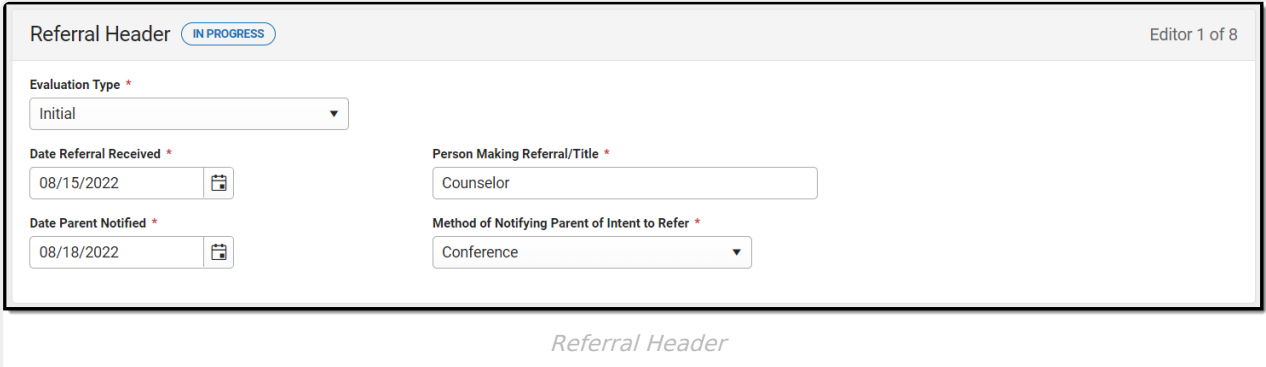
[Referral Header](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [\(R-1\) Referral to Special Education](#) | [\(IE-1\) Notice of Receipt of Referral/Start Initial Evaluation](#) | [\(RE-1\) Notice of Reevaluation](#) | [\(RE-2\) Notice of Additional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



The screenshot shows the 'Referral Header' editor interface. At the top, it says 'Referral Header' with a blue 'IN PROGRESS' button and 'Editor 1 of 8' on the right. The form contains several fields: 'Evaluation Type' (dropdown menu with 'Initial' selected), 'Date Referral Received' (calendar icon, date '08/15/2022'), 'Date Parent Notified' (calendar icon, date '08/18/2022'), 'Person Making Referral/Title' (text input with 'Counselor'), and 'Method of Notifying Parent of Intent to Refer' (dropdown menu with 'Conference' selected). Below the form, the text 'Referral Header' is displayed in a light gray font.

► [Click here to expand...](#)

Field Name	Description	Validation
Evaluation Type <i>Required</i>	The type of referral documented. Options include Initial or Reevaluation.	The values available in this dropdown are hard coded.
Date Referral Received <i>Required</i>	The date the school received the referral.	N/A
Person Making Referral / Title <i>Required</i>	The name and title of the person who referred the student.	N/A
Date Parent Notified <i>Required</i>	The date the parent/guardian was notified of the intention to refer the student for special education services.	N/A
Method of Notifying Parent of Intent to Refer <i>Required</i>	The manner in which the parent/guardian was notified. Options include: <ul style="list-style-type: none"> • Conference • Phone Call • Written 	The values available in this dropdown are hard coded.

[^ Back to Top](#)

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

09

School Name

High School

School Phone

District of Residence

Serving District

District Information

District Number

District Name

School District

District Address

WI 53404

District Phone

District SPED Address

WI 44444

District SPED Phone

Enrollment Information Editor

► [Click here to expand...](#)

Field Name	Description	Ad hoc/Database Location	Validation
Grade	The student's current grade.	Enrollment > Grade 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.
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.

Field Name	Description	Ad hoc/Database Location	Validation
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 <i>These fields are read-only.</i>			
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

[^ Back to Top](#)

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	First Name	Middle Name	Suffix
	Gabriel	L	
Race, Ethnicity	Gender	Birthdate	Student Number
Hispanic/Latino	M		
Student Primary Language	Interpreter Needed	WISEid	
English			
Address			
WI 53402-5537			
Case Manager Information			
Name	Title		
Phone			

Student Information Editor

► [Click here to expand...](#)

Field	Description	Ad Hoc/Location
Last Name	The student's last name.	Census > People > Demographics > Last Name identity.lastName
First Name	The student's first name.	Census > People > Demographics > First Name identity.firstName
Middle Name	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
Race, Ethnicity	The student's state defined race.	Census > People > Demographics > State Race/Ethnicity
Gender	The student's gender.	Census > People > Demographics > Gender identity.gender
Birthdate	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate

Field	Description	Ad Hoc/Location
Student Number	The student's identification number.	Census > People > Demographics > Student Number identity.studentNumber
Student's Primary Language	The student's first language.	Census > People > Demographics > Primary Language 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 identity.stateID
Student Address	The student's address. This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
Case Manager Information <i>These fields are read-only.</i>		
Name	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

[^ Back to Top](#)

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

Print Sequence

2

Delete

Address

53402-5537

Home Phone

Work Phone

Cell Phone

E-mail

Primary Language

English

Interpreter Needed

Gabriela - PARENT

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.

Field	Description	Ad hoc/Location	Validation
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.
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.apr; address.city; address.state; address.zip	This field populates from Census. 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 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.

[^ Back to Top](#)

(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.

(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...](#)

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
<p>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.</p>		
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

Field Name	Description	Validation
2. What are your Areas of Concern	<p>The area of concern for the student's disability. Options include:</p> <ul style="list-style-type: none"> • Academics/Pre-Academic Delays • Problems with Learning • Behavioral - Emotional Problems • Visual Problem • Communication Problems • Hearing Problems • Physical/Medical Problems • Sensory/Perceptual Skills • Delayed Self-Help Skills • Other 	N/A
Specify Other <i>*Required</i>	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

[^ Back to Top](#)

(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 *
02/06/2023

Date Notification will be Sent By *
month/day/year

Date Notice sent with Statement of Parental Rights
month/day/year

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...](#)

Field Name	Description	Validation
Notice of Receipt of Referral and Start of Initial Evaluation		
Date Referral Received <i>Required</i>	The date the school received the referral.	This auto-populates with the Date Referral Received from the Referral Header editor.
Date Notification will be Sent By <i>Required</i>	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.
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		
First Name <i>Required</i>	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 <i>Required</i>	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.

Field Name	Description	Validation
Role <i>Required</i>	<p>The role of the team member.</p> <p>State Defined values include:</p> <ul style="list-style-type: none"> • Representative of LEA • Special Education Teacher • Regular Education Teacher • Related Services Personnel • SLD Eval/RTI - Licensed to assess data • SLD Eval/RTI - Licensed to implement interventions • SLD Eval/RTI - Licensed to conduct diagnostic evaluations 	<p>State defined values display above district defined values.</p> <p>The state defined values are in a locked attribute dictionary, Evaluation.nEvalTMTTitleStateDefined.</p> <p>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined.</p>

[^ Back to Top](#)

(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 *

month/day/year

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

The School District Received a Request for a Reevaluation.

☐

Date Reevaluation Request Received

month/day/year

Request Received From

Specify Other:

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

Notice of Reevaluation Editor

► [Click here to expand...](#)

Field Name	Description	Validation
Notice of Reevaluation		
Date <i>Required</i>	The date of the notice or reevaluation.	N/A
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 <i>*Required</i>	The date the school received the request.	*When the above checkbox is marked, this field is available and required.
Request Received From <i>*Required</i>	Who sent the request. Options include: <ul style="list-style-type: none"> • Parent/Guardian • Child's Teacher • Other 	*When the above checkbox is marked, this field is available and required.
Specify Other <i>*Required</i>	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.

Field Name	Description	Validation
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 <i>*Required</i>	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 <i>*Required</i>	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 <i>*Required</i>	The date the last evaluation for the student took place.	*When the above checkbox is marked, this field is available and required.
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.

Field Name	Description	Validation
Notification of this request will be sent within 15 business days of	Indicates when the notification will be sent. Options include: <ul style="list-style-type: none"> The date the district received the request to reevaluate 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
Procedural Safeguards	A statement for the procedural safeguards. Options include: <ul style="list-style-type: none"> 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. 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.
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.

Field Name	Description	Validation
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.
Attendance		
First Name <i>Required</i>	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 <i>Required</i>	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 <i>Required</i>	<p>The role of the team member.</p> <p>State Defined values include:</p> <ul style="list-style-type: none"> • Representative of LEA • Special Education Teacher • Regular Education Teacher • Related Services Personnel 	<p>State defined values display above district defined values.</p> <p>The state defined values are in a locked attribute dictionary, Evaluation.nReEvalTMTITLEStateDefined.</p> <p>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined.</p>

[^ Back to Top](#)

(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 *
month/day/year

Date Notification will be Sent By *
month/day/year

Date of Discussion *
month/day/year

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...](#)

Field Name	Description	Validation
Notice of Agreement to Conduct a Reevaluation More than Once a Year		
Date Required	The date the notice of agreement to conduct a reevaluation for the student more than once per year was sent.	N/A
Date Notification will be Sent By Required	The Date on which the notification of determination will be sent to the Parent/Guardian.	N/A
Date of Discussion Required	The date the IEP discussed the agreement.	N/A
Place of Discussion	The location of the discussion. Options include: <ul style="list-style-type: none"> Met in Person Spoke on the Phone Exchanged Emails 	The values available in this dropdown are hard coded.

Field Name	Description	Validation
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
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.
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.

Field Name	Description	Validation
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 <i>Required</i>	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 <i>Required</i>	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 <i>Required</i>	<p>The role of the team member.</p> <p>State Defined values include:</p> <ul style="list-style-type: none"> • Representative of LEA • Special Education Teacher • Regular Education Teacher • Related Services Personnel 	<p>State defined values display above district defined values.</p> <p>The state defined values are in a locked attribute dictionary, Evaluation.nReEvalTMTITLEStateDefined.</p> <p>The state defined values are in an unlocked attribute dictionary, Evaluation.teamMemberTitleDistrictDefined.</p>

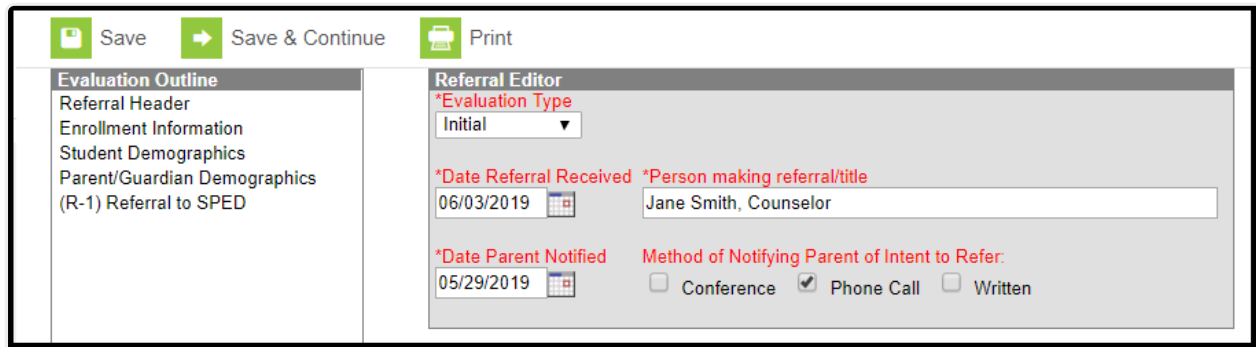
[^ Back to Top](#)

Classic View

► [Click here to expand...](#)

The Referral for Special Education Evaluation is used to document the reason the student was referred to a special education program and how that information was communicated to the parent/guardian.

The current format of this document is the **WI Referral 2022**. Evaluation formats are selected in [Eval Types](#).



Wisconsin Referral editors

The following table lists the editors available on the student's Referral, the section(s) of the print format that include the entered information, a description of what the editor is used for and any special considerations and instructions for using the editor.

Editor Name	Description	Special Considerations and Instructions
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.
Enrollment Information	The Enrollment Information editor includes student data entered on the student's Enrollments tool.	Clicking Get Info from Enrollment synchronizes the information in the editor with the student's Enrollments record. Users can select which Enrollment to link the Enrollment Status editor to using the Enrollment dropdown.
Student Demographics	The Student Demographics editor includes student data entered on the student's Demographics tab.	Clicking Refresh Student Information synchronizes the information in the editor with the current information entered on the Demographics , Households , School and Enrollments tools.

Editor Name	Description	Special Considerations and Instructions
Parent/Guardian Demographics	The Parent/Guardian Demographics editor populates based on established student/guardian relationships created on the student's Relationships tool or indicated by the guardian checkbox on the Households tool. The editor includes Demographics information for the student's guardian.	<p>Clicking Refresh Guardian Information synchronizes information in the editor with the most recent information from the student's guardian's Demographics, Households, and Team Members tool.</p> <p>When the Start Date for the Educational Surrogate Parent on the Team Members tool falls anytime before or on the Eval Start date, the data pulls into the Parent/Guardian Demographics editor. When the Start Date for the Educational Surrogate Parent falls anytime after the Eval Start Date, the data does NOT pull in to the Parent/Guardian Demographics editor.</p>
(R-1) Referral to Special Ed	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.	N/A

[^ Back to Top](#)

Previous Versions

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