

# 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 ⓘ

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

*Editor Home*

Header	Description
<b>Name</b>	The name of the editor.
<b>Status</b>	The state of the editor. Statuses can be: <ul style="list-style-type: none"> <li>• <b>In Progress</b> indicates a user has entered and saved data in that editor.</li> <li>• <b>Not Started</b> is the default status for all editors.</li> <li>• <b>Complete</b> indicates a user has clicked the <b>Complete</b> button on the editor. This does not lock the editor from further editing, but indicates the user considers the editor to be finished.</li> <li>• <b>Not Needed</b> indicates a user has clicked the <b>Not Needed</b> button on the editor. This is usually done for editors that do not apply to the student.</li> </ul>
<b>Modified By</b>	The date and the user by whom the editor was last edited.
<b>Completed By</b>	The date and the user who clicked the <b>Complete</b> button for that editor.

## General Evaluation Information

The following table lists the buttons available for the editors:


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

Button	Description
<b>Save</b>	<p>Different editors have different save options. Click the arrow next to the Save &amp; Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> <li>• <b>Save</b> captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the <a href="#">Editor Types</a> section for additional information.</li> <li>• <b>Save &amp; Stay</b> 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.</li> <li>• <b>Save &amp; Next</b> captures progress and navigates the user to the next editor.</li> <li>• <b>Save &amp; New</b> 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 <a href="#">Editor Types</a> section for additional information.</li> </ul>
<b>Refresh</b>	<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 <b>Save</b> after clicking Refresh to capture changes.</p> <p>A side panel displays listing all applicable Enrollment records for the student. See the <a href="#">Enrollments</a> tool documentation for additional information.</p>
<b>Cancel</b>	Navigates the user to the Editor Home screen or to the List Screen for List editors.
<b>Status</b> <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"> <li>• <b>Complete</b> 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 <b>In Progress</b>.</li> <li>• <b>Not Needed</b> 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 <b>In Progress</b> button.</li> <li>• <b>In Progress</b> only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.</li> </ul>
<b>Print</b>	Prints the entire evaluation.
<b>Editors</b>	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 <b>Close</b> to collapse the side panel.
<b>Previous</b>	Navigates the user to the previous editor.
<b>Next</b>	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.

Referral Header
IN PROGRESS
Editor 1 of 8

<p><b>Evaluation Type *</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span>Initial</span> <span style="margin-left: 5px;">▼</span> </div>	<p><b>Person Making Referral/Title *</b></p> <div style="border: 1px solid #ccc; padding: 2px; min-height: 20px;">Counselor</div>
<p><b>Date Referral Received *</b></p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">08/15/2022</div> <div style="margin-left: 5px; font-size: 0.8em;">📅</div> </div>	<p><b>Method of Notifying Parent of Intent to Refer *</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span>Conference</span> <span style="margin-left: 5px;">▼</span> </div>
<p><b>Date Parent Notified *</b></p> <div style="display: flex; align-items: center;"> <div style="border: 1px solid #ccc; padding: 2px; flex: 1;">08/18/2022</div> <div style="margin-left: 5px; font-size: 0.8em;">📅</div> </div>	

Referral Header

▶ [Click here to expand...](#)

^ [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**

**School Name**

**School Phone**

**District of Residence**

**Serving District**

**District Information**

**District Number**

**District Name**

**District Phone**

**District Address**

**District Phone**

**District SPED Address**

**District SPED Phone**

Enrollment Information Editor

▶ [Click here to expand...](#)

^ [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 [REDACTED]	First Name Gabriel	Middle Name L	Suffix
Race, Ethnicity Hispanic/Latino	Gender M	Birthdate [REDACTED]	Student Number [REDACTED]
Student Primary Language English	Interpreter Needed	WISEid [REDACTED]	
Address [REDACTED] WI 53402-5537			

**Case Manager Information**

Name	Title
Phone	

Student Information Editor

▶ [Click here to expand...](#)

^ [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

Delete

Address

53402-5537

Home Phone	Work Phone	Cell Phone
<input type="text"/>	<input type="text"/>	<input type="text"/>

E-mail

Primary Language Interpreter Needed

English

Gabriela - PARENT

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

^ [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...](#)

^ [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 \***

**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...](#)

^ [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 \***

**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**

**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...](#)

[^ 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 *	Date Notification will be Sent By *
<input type="text" value="month/day/year"/>	<input type="text" value="month/day/year"/>
Date of Discussion *	Place of Discussion
<input type="text" value="month/day/year"/>	<input type="text"/>

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...](#)

[^ Back to Top](#)

## Classic View

[▶ Click here to expand...](#)

[^ Back to Top](#)

## Previous Versions

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