

Referral (Wisconsin) [.2335 - .2339]

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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

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	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	The state of the editor. Statuses can be: <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
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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.

Referral Header IN PROGRESS
Editor 1 of 8

Evaluation Type *

Date Referral Received *

Date Parent Notified *

Person Making Referral/Title *

Method of Notifying Parent of Intent to Refer *

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 [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...](#)

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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

(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

The School District Determined that the Educational or Related Services Needs of your Child Warrant a Reevaluation

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

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