



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: Clerical Support for Special Education and Section 504 Responsibilities

NUMBER: REF-5640.9

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DATE: September 12, 2022

DUE DATE: **September 30 of each school year**

ROUTING
All Schools
Local District Superintendents
Local District Instructional Directors
Community of Schools Administrators
Special Education Administrators
LRE Specialists
School Site Administrators
Section 504 Designees
Teachers
School Administrative Assistants
Clerical Staff Assigned to Special Education and Section 504 Duties

Principals will:

1. Log in to the Principal’s Portal;
2. Identify an Office Technician or Sr. Office Technician clerical staff assigned to support special education and Section 504 tasks by September 30 of each school year. It is the responsibility of the school administrator to ensure the clerical staffing allocations designated for addressing special education and Section 504 tasks are adhered to each year. Staffing information is accessible on the LAUSD Budget Services and Financial Planning webpage at <https://achieve.lausd.net/budget>.
3. Administrators are to meet with designated special education and Section 504 clerical support staff to review all mandated tasks that are outlined in Attachment A-Clerical Support for Special Education and Section 504 Responsibilities. School administrators should access the most current version of each of the referenced publications in this section.
4. Complete the “Clerical Support for Special Education and Section 504” section in the *School Designee Form*;
5. Reassign staff when staffing changes occur during the school year by updating the *School Designee Form* in the Principal’s Portal. (The *School Designee Form* is available in the “Actions” section of the Principal’s Portal.)
6. Ensure the designated section of “Clerical Support for Special Education and Section 504” is completed in the *School Designee Form* no later than **September 30** of each school year.

PURPOSE: The purpose of this Reference Guide is to inform school administrators and clerical staff who support special education and Section 504 tasks of the updated training in MyPLN titled, “Clerical Support for Special Education and Section 504” (Keyword: Clerical Support) along with the due date and procedures for school administrators to identify specific clerical staff assigned to support special education and Section 504 tasks as clarified below. The identification of this clerical staff does not release



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certificated staff from their responsibilities related to all aspects of special education and Section 504 compliance in their roles as administrators and teachers.

MAJOR CHANGES:

This Reference Guide replaces REF-5640.8 dated August 16, 2021, of the same title, issued by the Division of Special Education. Website addresses have been updated. It also includes information regarding the MyPLN training availability.

BACKGROUND:

Clerical support to meet special education and Section 504 compliance and operational needs must be assigned at schools. The District is committed to ensuring special education and Section 504 procedures and legal timelines are followed. As such, all schools are required to designate a clerical staff member to conduct special education and Section 504 clerical duties as outlined in Attachment A, Clerical Support for Special Education and Section 504 Responsibilities.

INSTRUCTIONS:

It is the responsibility of the school administrator to ensure the requirements of special education and Section 504 compliance activities are met within the clerical staffing allocations provided to each school.

School staff designated to provide clerical support for Special Education and Section 504 who do not currently have an active Welligent account should follow the directions below before attempting to access the Welligent Management System. Requests for access is dependent on the type of employee requesting:

- District employees are provided with Welligent access through [one Access](#)
- Before requesting access, designated staff must have an active LAUSD Single Sign On (SSO) account.

More information is available on the [Welligent Support](#) website. Special education monitoring and support resources are available for school site administrators, Local District supervising administrators, and all staff supporting students with disabilities in the Supports for Substantial Compliance section of the District's Special Education Electronic Policies and Procedures Manual (e-PPM). Please refer to the Employees section of the Division of Special Education website to access the ePPM at <https://achieve.lausd.net/spedEmployees>.

TRAINING:

Designated clerical support staff are encouraged to complete the asynchronous "Clerical Support for Special Education and Section 504" training on MyPLN, Keyword: Clerical Support. This training will familiarize staff with best practices and guidance to support compliance with special education and Section 504 policies and procedures.

GUIDES, BROCHURES, AND POSTERS:

Schools are to order special education related informational guides and publications from the Stores Warehouse for distribution to parents and print from the Division of Special Education website when they are waiting to replenish/restock hard copies. The following publications may be accessed and downloaded on the Division of Special Education's dedicated Brochures webpage at <https://achieve.lausd.net/spedBrochures>



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1. “A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards)” booklet;
2. “Are You Puzzled by Your Child’s Special Needs?” brochure;
3. “The IEP and You” guide;
4. “The ITP and You” guide – secondary schools only;
5. “The ITP and You” booklet – secondary schools only;
6. “Extended School Year (ESY)” brochure; and
7. “Least Restrictive Environment (LRE)” brochure.

List of Informational guides and documents for Section 504:

1. “Section 504 and Students with Disabilities” brochure; and
2. “Educational Equity Compliance Office” brochure

Ordering Publications

To place orders for publications, schools are to complete a Los Angeles Unified School District [Requisition form](#) available on the Material Management Branch webpage at <https://achieve.lausd.net/Page/4026>.

When placing orders, the following materials numbers are to be used with each publication:

9661218950	A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards) - English
9661218951	A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards) - Spanish
9665026450	The IEP and You (English and Spanish)
9665026460	The ITP and You informational guide (English and Spanish)

For additional publications, including those available in other languages, please refer to publication and/or catalog to find material number.

RELATED RESOURCES:

- MyPLN Trainings: “Welligent Section 504 Self-Guided Lab” (Keywords: 504, Welligent); “Welligent Webinar Trainings” – districtwide monthly trainings to support welligent navigation and IEP management. (Keyword: Welligent); “Clerical Support for Special Education and Section 504” (Keyword: Clerical Support)
- Special Education Policies and Procedures Manual (*ePPM*), *Child Find and Search and Serve*; *Developing a Special Education Assessment Plan*; and *Getting Ready for an Individualized Education Program (IEP) Meeting*
- Budget Planning and Fiscal Services webpage: <https://achieve.lausd.net/budget>
- BUL-5977: Staffing Recommendations for Certificated and Clerical Personnel at Elementary Schools
- BUL-5978: Staffing Recommendations for Certificated and Clerical Personnel at Middle Schools
- BUL-5979: Staffing Recommendations for Certificated and Clerical Personnel to High Schools



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- BUL-4692: Section 504 of the Rehabilitation Act of 1973
- REF-6241: Mandatory Use of the Welligent Section 504 Program Module to conduct All Section 504 Activities
- BUL-5526: Procedures for Requesting Educationally Related Records of Students with or Suspected of Having Disabilities
- Material Management Branch website: <https://achieve.lausd.net/Page/4026>

ATTACHMENTS: Attachment A - Clerical Support for Special Education and Section 504 Responsibilities

ASSISTANCE: For assistance or further information regarding:

- Norms to Allocate Clerical Personnel to Elementary, Middle and Senior High Schools, please contact Budget Services and Financial Planning at (213) 241-2100 or email at budget-info@lausd.net.
- Clerical Support for Special Education activities, please contact Lilia Moran, Compliance Coordinator, Division of Special Education at (213) 241-6701, or via email at lilia.moran@lausd.net.
- Section 504, please contact Educational Equity Compliance Office, Office of the General Counsel at (213) 241-7682, or via email at equitycompliance@lausd.net.
- Requests for Pupil Records, please contact the Custodian of Records, Special Education Service Center-Operations at (213) 241-6701, or via fax at (213) 241-5167. Mail to: Custodian of Records, Special Education Service Center-Operations, Beaudry Building, 18th Floor.
- Welligent Support – Help webpage <https://achieve.lausd.net/Page/13405>

Clerical Support for Special Education and Section 504 Responsibilities

- Document all special education and Section 504 referrals in the Welligent Management System and track all legal timelines related to the development of special education assessment plans, assessments, IEP team meetings/Virtual IEP Team Meetings, annual and triennial IEP reviews;
- Inform appropriate school staff of referrals for special education assessment and provide an assessment plan or written response within 15 days of receipt of such requests to / parents/guardians/requestors;
- Inform appropriate school staff of referrals for Section 504 evaluations and provide a written response to the request by sending a *Section 504 Request for Evaluation and Consent* form or *Denial of Request for Section 504 Evaluation* form within a reasonable period of time;
- Document and maintain a school calendar of IEP/Virtual IEP and Section 504 team meetings in the Welligent system;
- Create IEP and Section 504 meeting notification forms in the Welligent system and ensure that appropriate participants are notified of upcoming IEP/Virtual IEP and Section 504 team meetings;
- Remind all team members of scheduled meetings, including location/virtual location, date, and time, and document attempts to encourage parents/guardians to attend and participate in the IEP/Virtual IEP and Section 504 team meetings;
- Provide copies of the Welligent IEP, special education, and Section 504 plan documents to parents/guardians;
- Provide notification of the availability of the Welligent IEP to all school staff responsible for implementing the IEP, including related services staff;
- Provide notification of the availability of the Welligent Section 504 plan to all school staff responsible for implementation, Section 504 Designees, and Case Managers;
- Download correct forms, calculate and document that special education activities are completed within legal timelines (15 days to provide a special education assessment plan following receipt of written request and 60 days to convene an IEP/Virtual IEP team meeting following the District's receipt of a signed special education assessment plan);
- Contact parents/guardians and/or staff to ensure that preparatory activities are completed within timelines, and arrange for any requested reasonable accommodations such as an oral interpreter, as appropriate, for IEP/Virtual IEP and Section 504 team meetings;
- Maintain required special education documents in the special education green folders, Section 504 Plan documents in Welligent and designated Section 504 folder as part of student cumulative records;
- Verify that all IEPs and Section 504 Plans are uploaded in the Welligent system, including those from students who have recently enrolled from another SELPA;
 - IEP Documents
 - Signed Assessment Plan
 - Signed Parent IEP Notification
 - Signed IEP Sign-In (Page 11)
 - Signed IEP Consent Page (Page 10)
 - Out of District IEP

Clerical Support for Special Education and Section 504 Responsibilities

LAUSD Section 504 Plan Documents or Equivalent from a Non-LAUSD SELPA

- *Request for Section 504 Evaluation and Consent*
 - *Response to Request for Section 504 Evaluation*
 - *Section 504 Parent Input*
 - *Section 504 Teacher Observation*
 - *Notice of Section 504 Evaluation Meeting*
 - *Section 504 Evaluation*
 - *Pandemic Learning Loss Consideration (required for 2022-2023 only)*
 - *Notice of Section 504 Eligibility Determination*
 - *Section 504 Plan*
 - *Section 504 Plan Request to Revoke Consent*
- Maintain logs of completed written translations of IEP and Section 504 related documents;
 - Respond to requests for pupil records **within 5 business days** pursuant to California Education Code Section 49065 and 56504. Upon receipt of records request by parent of a student with or suspected of having a disability at a school site, school will route request as outlined in BUL-5526 and immediately forward to the Custodian of Records (Refer to “Assistance” section for more information);
 - Access the following Welligent reports to assist in the monitoring of IEP legal timelines and any other IEP Welligent reports, as appropriate:
 - IEP Master Calendar Report
 - IEP200
 - IEP Assessment Report
 - Follow procedures identified in REF- 6241 *Mandatory Use of the Welligent Section 504 Program Module to Conduct All Section 504 Activities* to access Section 504 management reports in the Welligent System;
 - Notify the principal or designee when there is a technical problem related to the IEP or Section 504 process, such as obtaining appropriate forms, completed documents, or records;
 - Maintain an adequate supply of updated special education and Section 504 pamphlets and brochures (see “List of Supplementary Special Education and Section 504 Documents” below); and
 - Performing related duties as assigned.
 - Maintain stock of supplementary documents. Order from warehouse as needed and download via <https://achieve.lausd.net/spedBrochures>.

List of Supplementary Special Education Documents

1. “Are You Puzzled by Your Child’s Special Needs?” brochure;
2. “A Parent’s Guide to Special Education Services (Including Procedural Rights and Safeguards)” booklet;
3. “The IEP and You” guide;
4. “The ITP and You” guide – secondary schools only;
5. “The ITP and You” booklet – secondary schools only;
6. “Extended School Year (ESY)” brochure; and
7. “Least Restrictive Environment (LRE)” brochure.

List of Supplementary Documents for Section 504

1. “Section 504 and Students with Disabilities” brochure; and
2. “Educational Equity Compliance Office” brochure