

## Section 504 Annual Review (Short-form for Annual, “As Needed,” and Some Periodic Re-Evaluations)

<b>Student:</b>		<b>Student ID #:</b>		<b>Date of Birth:</b>	
Grade: _____		Campus: _____		Today’s Date: _____	
Student’s Impairments:					
Type of Evaluation: Annual Review		“As Needed”		Periodic Re-Evaluation (every 3 years)	

**Use of “Annual Review” Form**

Although an Annual Review is not required by federal law, the school believes that conducting Annual Reviews (or Annual Re-Evaluations) is a best practice to ensure that student needs are met on an on-going basis and that changes to either the Student’s condition or need for services are recognized and addressed expeditiously. This form may be appropriate for other reviews as warranted by changes in the student’s condition or need for services (“As Needed” Reviews or “As Needed” Re-Evaluations). This form may also be used for Periodic Re-Evaluations (those required by the Section 504 regulations at least every three years), as long as each of the screening questions below are answered in the affirmative. If both answers are not “yes,” the Annual Review Form is inappropriate for the periodic re-evaluation and Form 10 should be used instead (or Form 16 for students identified as dyslexic in Texas).

**§504 Committee Membership:**

By regulation, the Section 504 Committee is a group of knowledgeable people. Within the group, each required type of knowledge must be present. List each member attending and check the area of knowledge each provides (attach an additional sheet if necessary). Each required area of knowledge must be present on the committee.

Name	Position/Title	This member has knowledge of ....
		<input type="checkbox"/> The Child
		<input type="checkbox"/> The meaning of the evaluation data
		<input type="checkbox"/> The placement options
		<input type="checkbox"/> The Child
		<input type="checkbox"/> The meaning of the evaluation data
		<input type="checkbox"/> The placement options
		<input type="checkbox"/> The Child
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		<input type="checkbox"/> The meaning of the evaluation data
		<input type="checkbox"/> The placement options

**Dyslexia Instructions.** When the student’s identification as dyslexic is being re-considered by the §504 Committee, Form 16 should be used instead of Form 14. When no new dyslexia assessment is being reviewed, a member with knowledge of the following may be invited, but is not required by the Blue Book.

Name	Position/Title	This member has knowledge of.....
		<input type="checkbox"/> The dyslexia assessment
		<input type="checkbox"/> The reading process
		<input type="checkbox"/> Dyslexia and related disorders
		<input type="checkbox"/> Dyslexia instruction
		<input type="checkbox"/> District or charter school, state & federal guidelines for assessment

**Procedural Checklist:**

In addition to proper membership, four things must be verified before the Annual Review can be completed. (Questions 1-4). Please verify by checkmark that each requirement is completed before proceeding.

1. Verify that the §504 Committee is a group, including a person with knowledge in each of the required areas.						
2. Verify that the parent received Notice of Parent Rights under §504						
3. Verify <i>how</i> the parent was informed of the date, time, and place for this evaluation (check one)						
In writing	By Phone	In Person	Other:			
4. Verify that use of the Annual Review form is appropriate by completing the following screening questions.						

**Section 504 Eligibility Determination**

As directed by Congress in the ADA, the Section 504 Committee understands that the definition of disability “shall be construed in favor of broad coverage of individuals under this Act, to the maximum extent permitted by the terms of this Act.”

<p><b>(A) Generally speaking, does the Student’s most recent evaluation accurately reflect all of the Student’s physical or mental impairments, including impairments that are episodic and impairments in remission?</b> If yes, the Student remains Section 504 eligible. If the answer is no, the Committee should conduct a full Re-Evaluation using Form 10.</p>	Appropriateness of Short Form Question 4A
Yes <input type="checkbox"/> No <input type="checkbox"/>	

<p><b>(B) Generally speaking, does the Student’s most recent evaluation accurately reflect the impact of the student’s physical or mental impairments, including impairments that are episodic or in remission, on the student’s ability to access and participate in the school’s programs and activities?</b> If yes, and the student has a Section 504 Services Plan in place, the student will continue to receive a Section 504 Services Plan. If the answer is no, the Committee should conduct a full Re-Evaluation using Form 10.</p>	Appropriateness of Short Form Question 4B
Yes <input type="checkbox"/> No <input type="checkbox"/>	

**Analyzing the Results:** If the answer to screening questions A & B are both Yes, and the procedural steps are complete, proceed to evaluate using this form. Should either answer be “No,” Form 10 should be used instead of this form (or Form 16 when the student is dyslexic under Texas law).

**Evaluation Data Considered from a Variety of Sources**

The Committee reviewed and carefully considered data gathered from a variety of sources, including the Referral Document. [Please check each type of data reviewed by the Committee, or attach copies of the data.]

Parent input	Student work portfolio
Teacher/Administrator Input & Recommendations	Special education records (specify)
Aptitude and Achievement Tests	Social or cultural background
Other Tests	Disciplinary records/referrals
Early Intervention data	Mitigating measures
Grade reports	Adaptive behavior
School Health Information	Other
Medical evaluations/diagnoses/physical condition	Other
Dyslexia assessment/dyslexia progress data	Other

NOTE: If information from a conversation or other data in unwritten form was considered, please document that oral data relied upon by attaching written notes summarizing the conversation or data.)

**Changes since the last evaluation:**

Please describe any changes in the Student’s impairments or changes in the student’s disability-related needs since the last full evaluation: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

<b>Section 504 Committee Action (select the appropriate action by checkmark)</b>	
<b>No changes to 504 Plan.</b> No changes to the current Section 504 Services Plan are necessary at this time. The student's existing Section 504 Services Plan will remain in place as written, subject to future Annual Reviews, periodic Re-Evaluations, or other reviews, should changes in the student's impairments or need for services so require.	
<b>Changes to 504 Plan.</b> Changes to the Section 504 Services Plan are necessary. The Section 504 Committee will proceed to make appropriate changes to the Services Plan.	
<b>No 504 Plan (In Remission).</b> The student remains eligible under Section 504, but will not require a Section 504 Services Plan because the physical or mental impairment is in remission, and there is no current need for services. The student will receive manifestation determination, procedural safeguards, periodic re-evaluation or more often as needed, as well as the nondiscrimination protections of Section 504. Should need for a Plan develop, the Section 504 Committee shall reconvene and develop an appropriate Section 504 Services Plan.	
<b>No 504 Plan (Mitigating Measures).</b> The student is eligible under Section 504, but will not require a Section 504 Services Plan because the student's needs are met as adequately as his nondisabled peers due to the positive effect of mitigating measures currently in use. The student will receive manifestation determination, procedural safeguards, periodic re-evaluation or more often as needed, as well as the nondiscrimination protections of Section 504. Should need for a Plan develop, the Section 504 Committee shall reconvene and develop an appropriate Section 504 Services Plan. This result applies when the mitigating measures are neither provided by nor implemented by the School.	
<b>§504 Eligible + No Implemented Plan (Refusal/Revocation of Consent for Services).</b> The Student is eligible under §504, but will not be served under a §504 Services Plan at this time because the Student's Parent has either refused consent for initial Section 504 Services or has revoked consent for continued Section 504 Services. The Parent's action is documented in Form 12. The Committee will complete the Section 504 Services Plan (Form 13), but the Plan will not be implemented due to the Parent's refusal to consent or revocation of consent. The Student will receive manifestation determination, procedural safeguards, periodic re-evaluation or more often as needed, as well as the nondiscrimination protections of §504. Should the Parent desire Section 504 Services for the Student, the Parent will notify the §504 Coordinator to convene a Section 504 Meeting.	

**[Parents must be provided notice of the results of this meeting.  
The Notice of Section 504 Evaluation Results, Form 11,  
can be used for this purpose.]**