

## §504 Eligibility and Planning Worksheet

Student Name: \_\_\_\_\_ School: \_\_\_\_\_ Date: \_\_\_\_\_

**1.) What is the student’s primary impairment?** \_\_\_\_\_ If there are secondary impairments, list them here: \_\_\_\_\_

*Please list evidence/evaluation data used to make this determination<sup>1</sup>, and attach the information (not always doctor’s documentation). Remember that we don’t diagnose conditions; we determine eligibility based on need. The definition of “disability” is much looser in 504 than SPED.*

Remember that a student may have an impairment that substantially limits a major life activity, but still not need a 504 plan. These students would still be eligible for procedural safeguards and nondiscrimination protections under §504.

**2.) How does the disability limit major life activities for the student?**

Major Life Activity <sup>2</sup> Impacted	Description of the NATURE of how the impairment affects/impacts the major life activity in the current school setting <sup>3</sup>	Source of information (data and/or person) <sup>1</sup>	SEVERITY					DURATION <sup>4</sup>	Substantial limitation? <sup>5</sup> Yes or No	
			Mild				Severe	How long will the impact last?		
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No
			1	2	3	4	5		Yes	No

<sup>1</sup>504 regulations require teams to draw upon a variety of sources/measures concerning disability *and* impact. These may include aptitude and achievement tests, teacher recommendations, physical condition, social and cultural background, parent input, outside professional’s documentation, testing from related servers, interventions previously tried, and adaptive behavior.

<sup>2</sup>major life activities include, but are not limited to, caring for oneself, performing manual tasks, seeing, hearing, eating, sleeping, walking, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, working, interacting with others, functions of the immune system, normal cell growth, and digestive, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, and reproductive functions.

<sup>3</sup>be sure to take into account any other non-disability related factors that may be affecting the student’s performance (mood swings, motivation, etc.). However, remember that mitigating measures may not be taken into account when determining if the student has a disability, but they may be when determining whether a 504 plan is necessary.

<sup>4</sup>an impairment that is episodic or in remission IS a disability if it would substantially limit a major life activity when active. Furthermore, the six month rule doesn’t seem to apply to education.

<sup>5</sup>based on consideration of the nature, severity, and duration of the impairment. There is no single formula or scale, so determination must be made by a qualified team on a case-by-case basis.

### 3.) Are services required to allow the student to have educational opportunities commensurate with their nondisabled peers?

- Think of the student's substantial limitations from #2. Use the following chart to match those needs with appropriate services. The plan should focus on current situation and needs rather than future concerns or projections. Remember that it is possible for a student to have a disability and substantial limitation but NOT need a 504 plan for commensurate opportunity.
- Do not rely on presumptions or stereotypes about persons or classes of persons with certain disabilities (cookie-cutter plans or laundry lists of accommodations); evaluation and service determinations should be based on individual needs as shown by data and evaluation.

Student Concerns/Problems (may come from teachers, parents, outside professionals, student, etc.)



If assistance is needed, list services we can offer in this setting to match that specific student need

Remember, student needs can often be met in a variety of ways:

- Accommodations
- Assistive technology
- Staff Training
- Related Services (OT, PT, Psych, transportation, Speech, medical, counseling, etc.)
- Adult Assistance (not always a TA)
- Other

Our goal is to provide reasonable support while fostering independence and self-management! This can usually be best achieved by using the least restrictive intervention possible. Furthermore, independence is often impeded by over-accommodating. Please determine if a less restrictive intervention won't work before using a more restrictive one.

**If the team determines that the student is eligible for a 504 plan, use this information to fill out the 504 plan in Encore, then print to get signatures. Also document information in the meeting summary (this worksheet is NOT to be used as a meeting summary!). Keep this form in the file to show the process the team went through in making the eligibility determination.**