

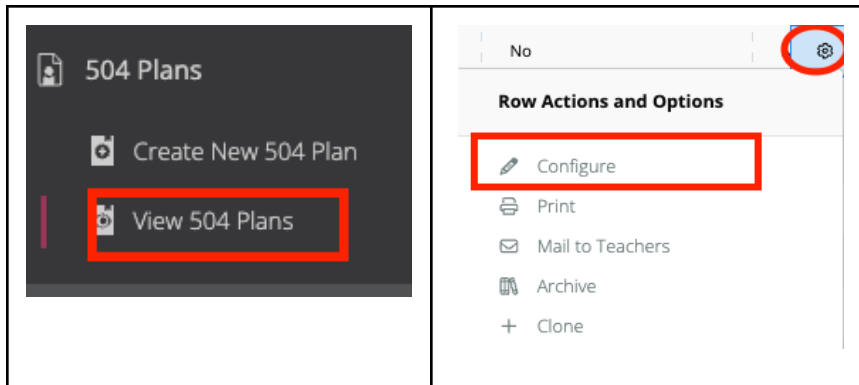
Switching School

When a student transfers to a new school, the district has several ways to manage the student's 504 plan. But first, districts will likely want to add this to their end-of-year rollover procedures. Two potential ways to transition a 504 plan for a student who has been promoted to a new school:

Option 1 Plan Manager Role

The old or new school updates the **same plan** with the new 504 Coordinator.

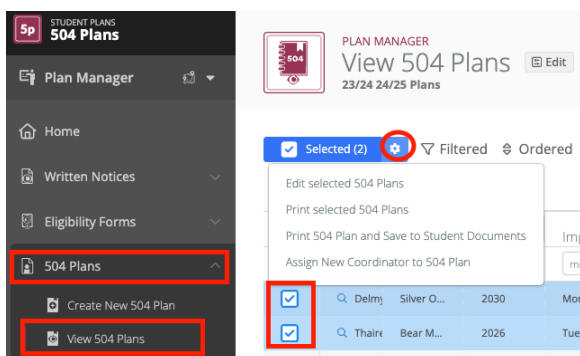
1. Start under **504 Plans** in the left navigation menu and choose **View 504 Plans**.
2. Click the **Row Actions & Options Gear** to the far right and select **Configure (Edit in V2)**.



3. In the **Details tab > Selected Parties** section, click the **504 Plan Coordinator** field, then select the **checkbox** for the new coordinator.
4. Click **Save**.



5. To edit multiple students, select one or more **checkboxes** to the left.
6. Click the **Selected Gear** in the top left and choose **Assign New Coordinator to 504 Plan**.

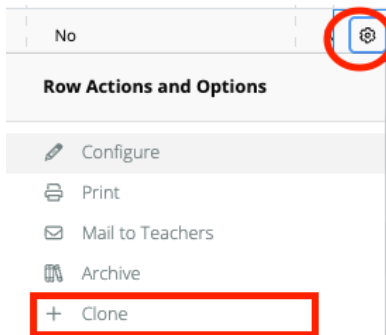


7. Click the **504 Plan Coordinator** field, then select the **checkbox** for the new coordinator.
8. Click **Save**.

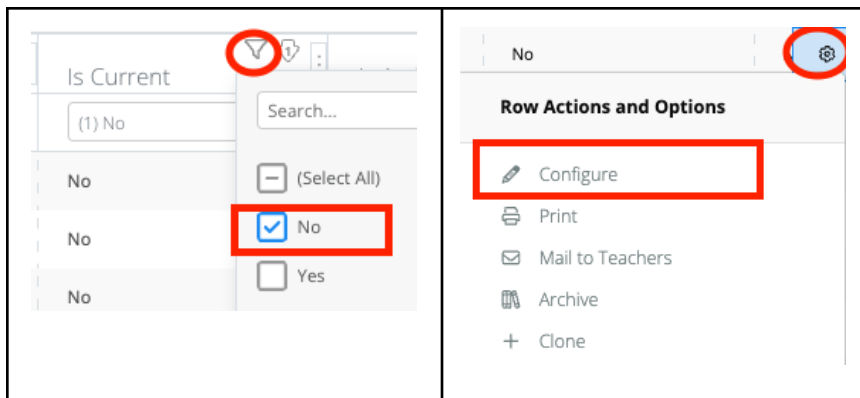
Option 2 Plan Manager Role

The new school 504 Coordinator will clone the previous school plan and update it for the new school.

1. Start under **504 Plans** in the left navigation menu and choose **View 504 Plans**.
2. Click the **Row Actions Gear** to the far right and choose **Clone**.



3. Click the **Is Current Column filter icon**, then select the **No checkbox** to locate the newly cloned column.
4. Click the **Row Actions Gear** again to the far right of the cloned plan and choose **Configure (Edit in V2)**.



5. In the **Detail tab**, fill in the **Disability section > Disability Area(s)** and **Important Dates section > Periodic Re-Evaluation** date for that plan to become the new current plan.
6. Click **Save**.


Details Impairments Accommodations Communications Files

Disability **Area of Disability (required)**
Sample

Important Dates

Implementation Date (required) 12/6/21	Review Date (required) 12/6/22	Periodic Re-Evaluation ... (required) 12/6/24
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7. The **Old School Plan (i.e., unedited plan)** should now be removed. Click the **Row Action Gear** to the far right and choose **Archive**. The current 504 Coordinator's plan will no longer be listed.

No	No	
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Row Actions & Options

- Edit
- Print
- Mail to Teachers
- Archive**
- Clone
- Delete