



NEW CANEY ISD
A SHINING STAR *in* TEXAS EDUCATION

DEVELOPMENT LIFE CYCLE OF 504/SPED REFERRAL PACKET

- ❖ Tammy Yarbrough
- ❖ Evelyn Sifford
- ❖ Sarah Brady

PRESENTERS



Tammy Yarbrough

- Records Management Officer
- 21 Years at NCISD
- Purchased Laserfiche in 2014



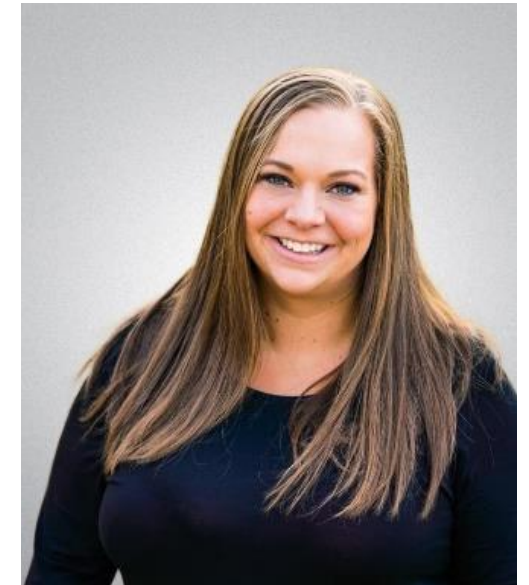
Evelyn Sifford

- Director of Special Programs
- 6 Years at NCISD



Sarah Brady

- Coordinator of Academic Support
- 13 Years at NCISD



NEW CANEY ISD

30 miles
Northeast of
Houston

19,461 Students

2959
Employees

Laserfiche
Implemented:
2014

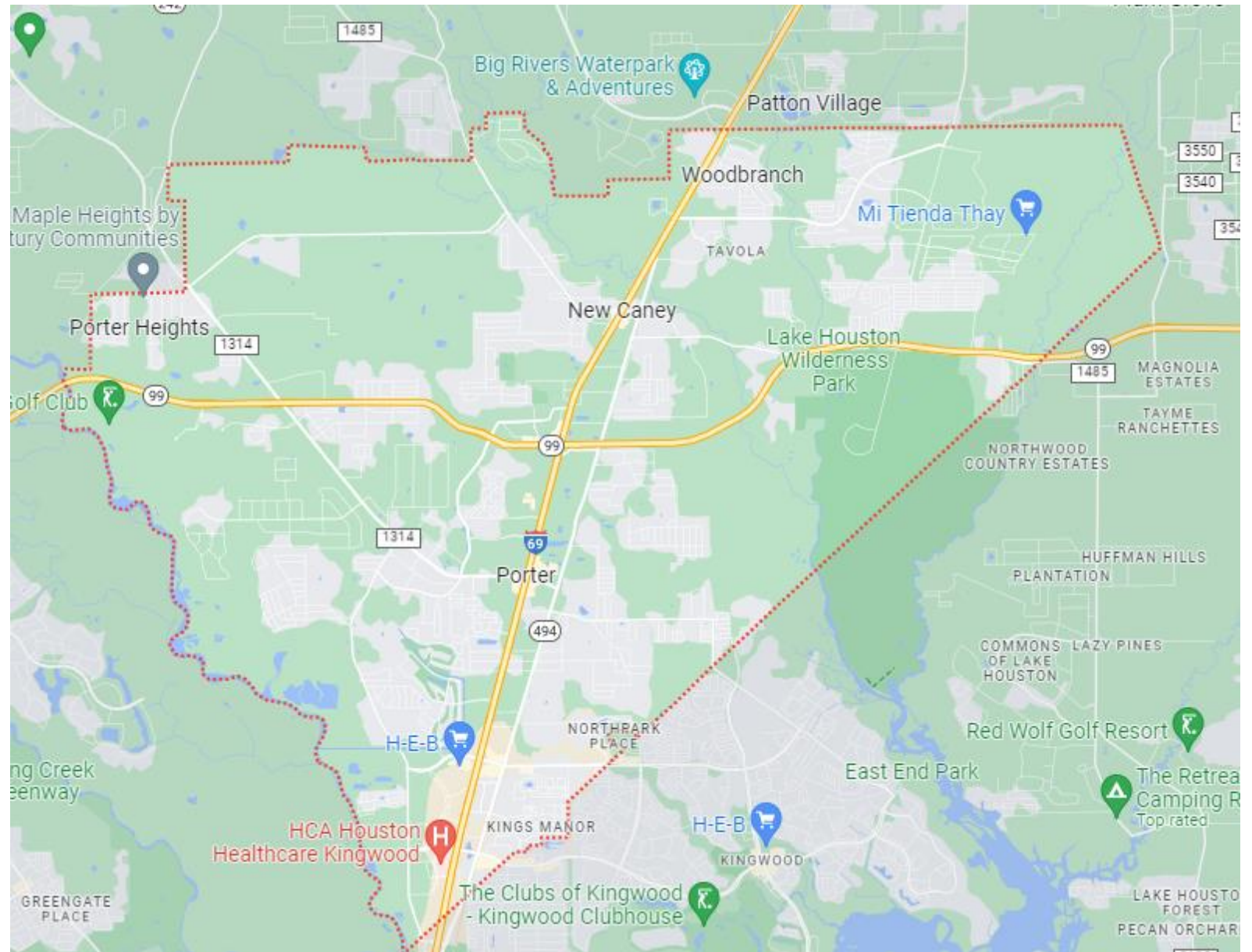
300 Live
Forms

474 Created
forms

8 Repositories

1000 Full
Users

10,000
Educational
Licenses



REFERRAL PACKET

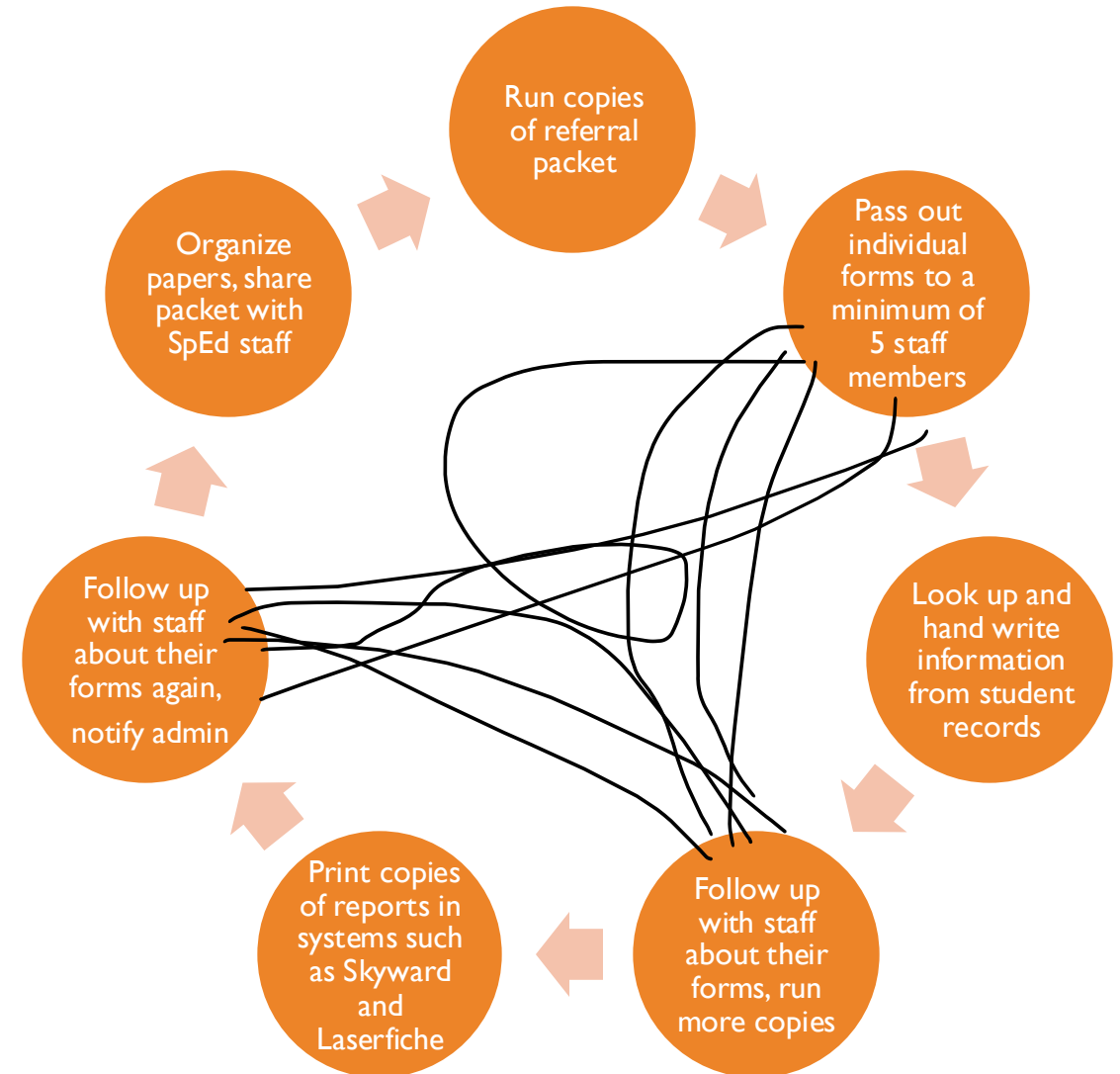
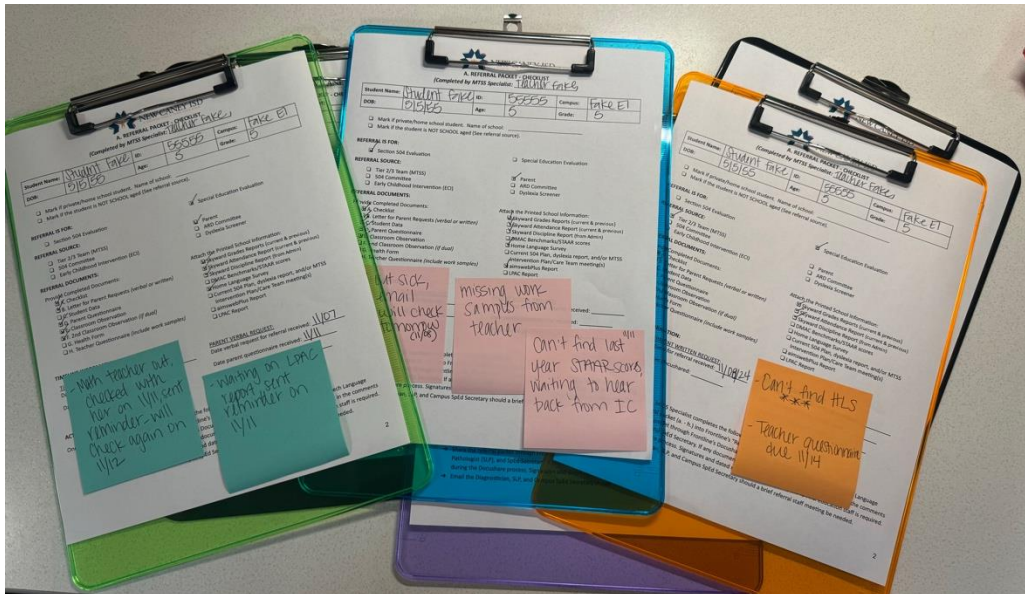
When a student has been referred for an evaluation, the school staff gather information in what is typically called a referral packet.

This helps the school staff determine if they will move forward with an evaluation and attempt to obtain consent (SpEd) or to determine if there is an eligibility (504).



THE OLDEN DAYS

In NCISD, the MTSS Specialist was the one who initiated the referral for an evaluation request.



SPECIAL PROGRAMS REFERRAL PACKET

Issues needing to be resolved:

- Papers being lost, no way to know who has the forms at a given time
- Losing track of what tasks have been completed
- Not completing within timeline
- Manually entering data that resides in system
- Principals were unaware of past due items, MTSS Specialist put in uncomfortable situations
- Accurate data
- Intervention time with students lost due time referral packet was taking to complete





LOOKING FOR SOLUTIONS

- Is it possible to make part or all of this process electronic?
- Could the system automatically pull data that is already electronically filed?
- Would an electronic process be easy and efficient for all staff members?
- Would an electronic process be easy and efficient for the parents/guardians?

COLLABORATION

The referral packet process is complicated and includes a significant number of stakeholders (parents, teachers, nurses, registrars, multilingual coaches, etc.) and strict timelines based on which type of referral was initiated.

Due to the complexity of this process, we had to understand each other's worlds before we could get into the nitty gritty of the planning and building of this process in Laserfiche.

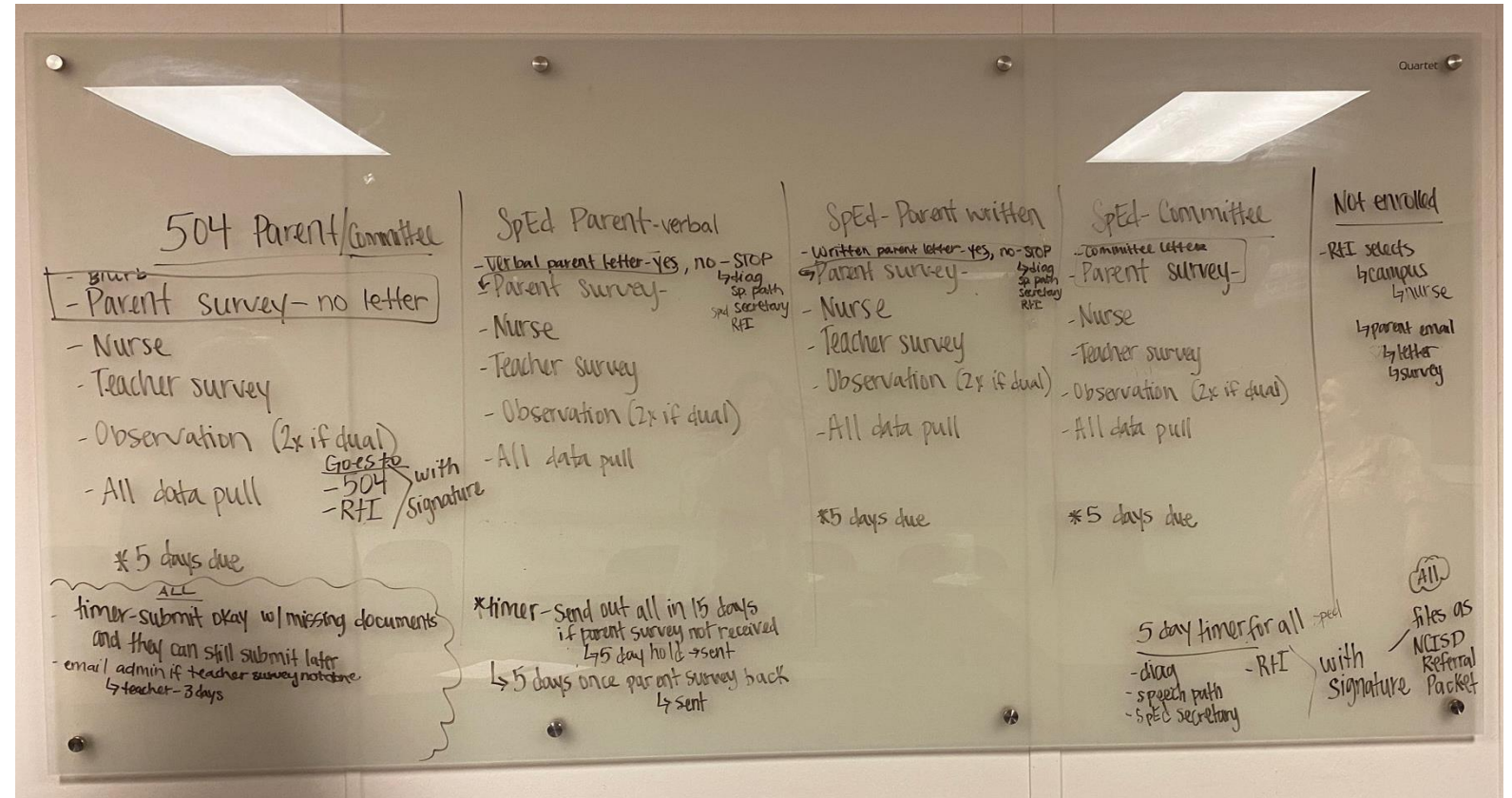
As we built each other's foundations for this project, we could see how all of our pieces could fit together to turn this idea into something truly amazing!



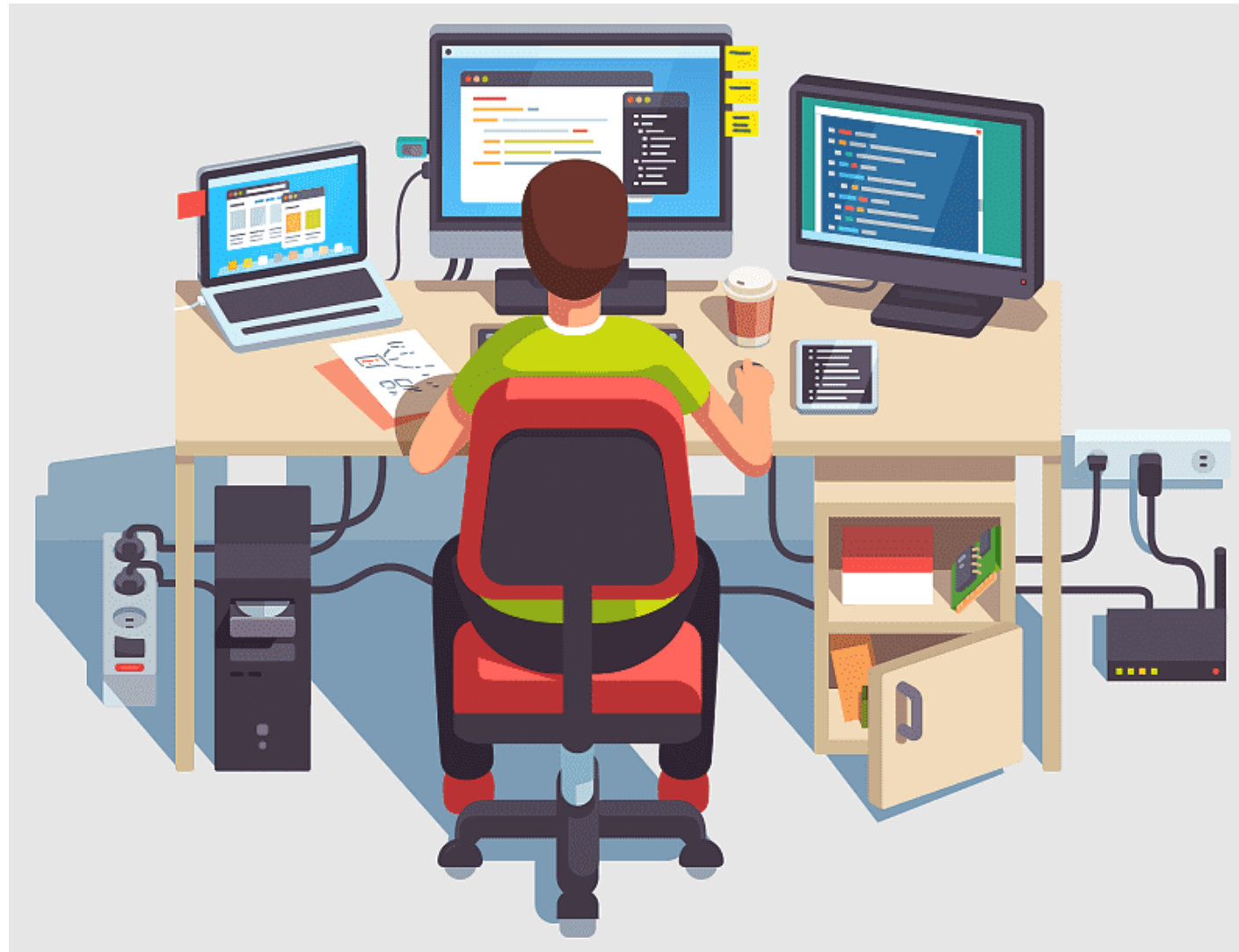
UNDERSTANDING EACH OTHER'S WORLDS

A visual of the 5 different paths we needed the one form to be able to do was drawn on the board.

Additional notes such as when reminders would be emailed and when timers would go off were added to the visual throughout the collaborative discussion.



TIME TO BUILD!



SPECIAL PROGRAMS REFERRAL PACKET – BEGINNING SCREEN

504
Evaluation

Special
Education
Evaluation

WORK FLOW BEGINS BASED ON THIS ANSWER

NCISD Referral Packet - Student Information
NEW CANEY ISD www.newcaneyisd.org • 21580 Loop 494 • New Caney, Texas 77357 • Tel. 281-577-8600 • Fax 281-354-1878

Please Select *
☒ Active Student ☐ New Student

School Yr *
2023-2024

Employee Information

Employee # * First Name * Last Name *

Student Information-Active Students

Student ID * First Name * Last Name * Grade *

Date of Birth * Campus *

Address 1 * Address 2 * City * State * Zip Code *

Referral Information

Referral is for * Parent E-mail *

Value is required.

This student is being referred for an evaluation due to concern(s) in the following area(s):

☐ Reading	☐ Writing
☐ Speech/Language	☐ Behavior
☐ Math	☐ Health/Physical
☐ Attention	☐ Other

History of Special Programs And/Or Need

The student is currently identified in the program(s) below: *

☐ Emergent Bilingual	☐ MTSS
☐ Section 504	☐ Special Education
☐ At Risk	☐ Dyslexia
☐ Health Alert	☐ None
☐ Other	

Acceptance & Digital Signature

By typing my legal full name and checking the acceptance box you:

- Accept the rules of this form.
- Agree that all information contained is accurate.
- Confirm that you are the person referenced through out the form and the acceptance section.

PATHS AND TIMERS



Multiple Paths

Is this a Section 504 or Special Education referral?

Is this a Parent or Committee Request?

If parent, is it a verbal request or written request? (different legal requirements)



Flows based off the decision

Verbal waits for parent letter to be returned or launches at the 15th day

Written – workflow is immediate
Flows to all student teachers based on the students schedules in Skyward for questionnaires and classroom observations

Nurse- Vision and Hearing screener

Attendance clerk- Attendance

Multilingual Coach- LPAC information

MTSS Specialist- Observation and Student History form

Once forms have been submitted/completed, the packet is bundled and sent to the MTSS/RTI, 504, and/or SPED staff

If any forms are missing in the bundling packet and submitted later, an email will be sent with the document attached to all the above.

This student is being referred for an evaluation due to concern(s) in the following area(s): *

- | | |
|--|---|
| ☐ Reading | ☐ Writing |
| ☐ Speech/Language | ☐ Behavior |
| ☐ Math | ☐ Health/Physical |
| ☐ Attention | ☐ No Concern by Care Team (Parent Request) |

Referral is for

Parent Letter

Parent E-mail

Care Team/Parent Written Request

Date written request for referral received

Parent Verbal Request

Date verbal request for referral received

Date 'Parent Questionnaire' received

File Upload

Drag and drop up to 10 files here to upload or

Choose files

Accepted files: pdf, doc, docx, png, tiff, xlsx, xls, jpg

History of Special Programs And/Or Need

The student is currently identified in the program(s) below: *

- | | |
|---|--|
| ☐ Emergent Bilingual | ☐ MTSS |
| ☐ Section 504 | ☐ Special Education |
| ☐ At Risk | ☐ Dyslexia |
| ☐ Other <input type="text"/> | |

Is this student in dual language?

☐ Yes ☐ No

Has the student previously been referred or evaluated for: If 'Yes', List dates:

- | | | |
|--|--------------------------------------|-------------------------------|
| ☐ Special Education | ☐ Section 504 | ☐ None |
|--|--------------------------------------|-------------------------------|

Date fields will be asked below

STUDENT HISTORY

Student History

Has the student previously been referred or evaluated for. If 'Yes', List dates:

☒ Special Education

☒ Section 504

☐ None

☐ Unknown

Date fields will be asked below

Special Education

MM/DD/YYYY 

Section 504

MM/DD/YYYY 

Has the student been retained? *

☒ Yes

☐ No

☐ Unknown

Grade(s) retained:

☐ EE

☐ PK

☐ KG

☐ Grade 1

☐ Grade 2

☐ Grade 3

☐ Grade 4

☐ Grade 5

☐ Grade 6

☐ Grade 7

☐ Grade 8

☐ Grade 9

☐ Grade 10

☐ Grade 11

☐ Grade 12

Did the student access remote instruction during the 2020-2021 school year?

☒ Yes

☐ No

Has the student received instruction in locations other than New Caney ISD? *

☒ Yes

☐ No

If yes, list the Grade/Year and School/District attended (?)

Grade(s)

School Name

School District

Country

STUDENT HISTORY

If yes, list the Grade/Year and School/District attended ^(?)

Grade(s)

School Name

School District

Country

If the student attended school out of the country, please indicate which country. If the student did not attend school, please indicate "Not Enrolled"

[+ Add](#)

Based on the data reviewed, there may be concerns with the following

- ☐ Student has excessive absences
- ☐ Numerous changes in school environments (i.e. changes of school within district, changes between districts, changes between homeschool/private school and public school)
- ☐ Has not attended a public or private school within the United States
- ☐ Unknown-Difficult to retrieve records due to homeschooling
- ☐ Other

Attach the Printed School Information

- ☐ Current 504 Plan, dyslexia report, and/or MTSS Intervention Plan/Care Team meeting(s)
- ☐ Student Data Review Guide
- ☐ Other

File Upload

Drag and drop up to **10** files here to upload or

Choose files

TEACHER OBSERVATION FORM

If the student is in a dual language classroom, 2 observation forms are launched.

Teacher Information

Employee ID *

Teacher First Name *

Teacher Last Name *

Subject *

Prior questionnaire submitted for different subject

☐ Yes ☒ No

Student Information

Student ID *

First Name *

Last Name *

Grade *

Campus *

What instructional concerns do you have about this student? *

- ☐ Poor Progress Acquiring Basic Reading Skills
- ☐ Difficulty in Spelling
- ☐ Few Appropriate Cognitive Learning Strategies
- ☐ Other

- ☐ Poor Progress Acquiring Basic Math Skills
- ☐ Difficulty Producing Written Work
- ☐ None

What behavioral concerns do you have about this student? *

- ☐ Poor Attention and Concentration
- ☐ Excessively High/Low Activity Level
- ☐ Easily Frustrated
- ☐ Difficulty Working with Peers
- ☐ None

- ☐ Noncompliance with Teacher Directives
- ☐ Difficulty Following Directions
- ☐ Extreme Mood Swings
- ☐ Difficulty Staying on Task
- ☐ Other

Previous

Next

TEACHER OBSERVATION

Rate Student's Behavior in Each of the Following Areas:

For Sections A,B,C, & D: Rate student in relation to other student's of the same AGE.

1=POOR
2=BELOW AVERAGE
3=AVERAGE
4=ABOVE AVERAGE
5=SUPERIOR
N=NOT OBSERVED

A. RECEPTIVE LANGUAGE SKILLS

	English *	Other Language
1. Comprehends word meanings		
2. Follows oral instructions		
3. Comprehends classroom discussion		
4. Remembers information just heard		

B. EXPRESSIVE LANGUAGE SKILLS

	English *	Other Language
1. Displays adequate vocabulary		
2. Uses adequate grammar for general understanding		
3. Expresses self fluently when called upon to speak		

TEACHER OBSERVATION

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	English *	Other Language
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3. Expresses self fluently when called upon to speak		

TEACHER OBSERVATION

C. EMOTIONAL/BEHAVIORAL/SOCIAL

1. Generally cooperates or complies with teacher requests

Rating *

2. Adapts to new situations without getting upset

Rating *

3. Accepts responsibility for own actions

Rating *

4. Makes and keeps friends at school

Rating *

5. Works cooperatively with others

Rating *

6. Has an even, usually happy disposition

Rating *

7. Is pleased with good work

Rating *

8. Initiates activities independently

Rating *

9. Responds appropriately to praise & correction

Rating *

TEACHER OBSERVATION

Additional Interventions Provided

Student services and special programs provided or considered in response to student's concern(s):

	How Long	Currently	Results
Counseling			

	How Long	Currently	Results
School Health Services			

	How Long	Currently	Results
Title 1/Part A (Must be provided or considered for students prior to referral)			

	How Long	Currently	Results
Bilingual Program			

	How Long	Currently	Results
English as a second language strategies			

	How Long	Currently	Results
Local remedial program			

If using local remedial program, please specify

Instructional Accommodations attempted in response to student's concern(s) include:

	How Long	Currently	Results
Individual tutoring			

	How Long	Currently	Results
Alternate materials			

EMERGENT BILINGUAL FORM



NEW CANEY ISD

NCISD Referral Packet - Emergent Bilingual

www.newcaneyisd.org • 21580 Loop 494 • New Caney, Texas 77357 • Tel. 281-577-8600 • Fax 281-354-1878

Please Select *

☐ Active Student ☐ New Student

Employee Information

Employee # *

First Name *

Last Name *

Emergent Bilingual

Upload files from Elevation *

Drag and drop up to **10** files here to upload or

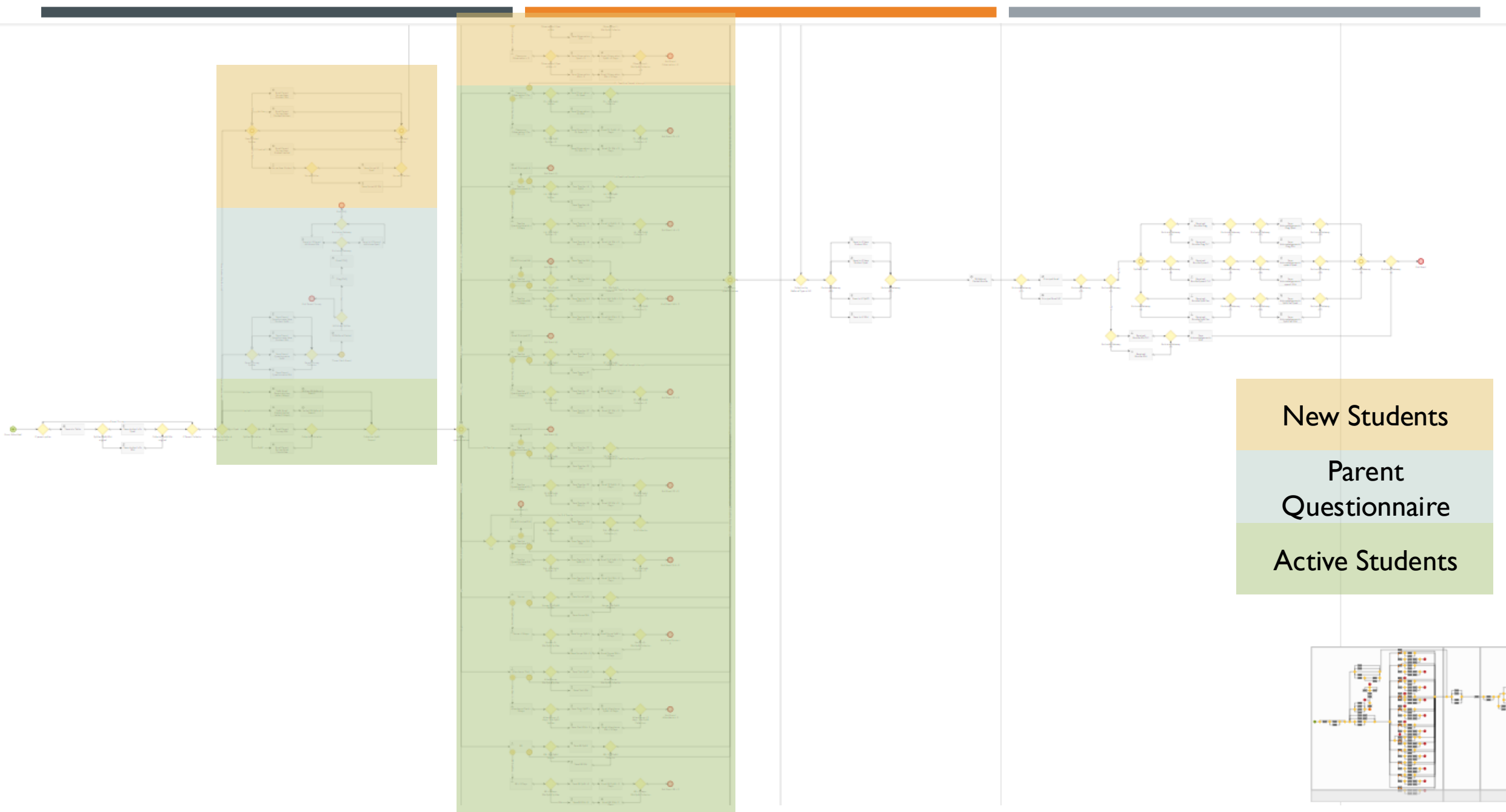
Choose files

Accepted files: pdf, doc, docx, png, tiff, xlsx, xls, jpg

Employee Signature

Date	Employee First & Last Name *	Employee ID *	Accept *
11/13/2024			☐ Accept

Submit



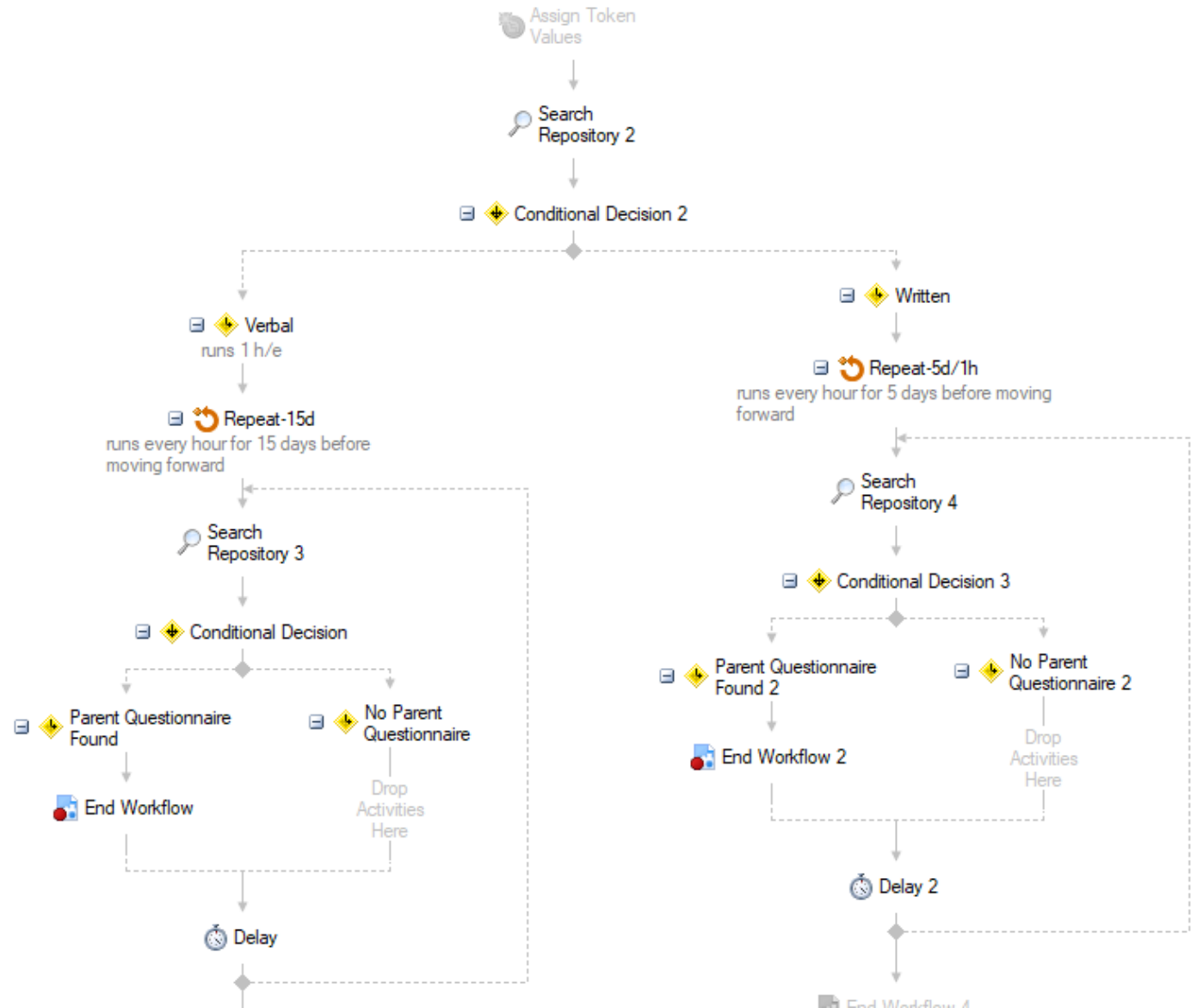
New Students

Parent
Questionnaire

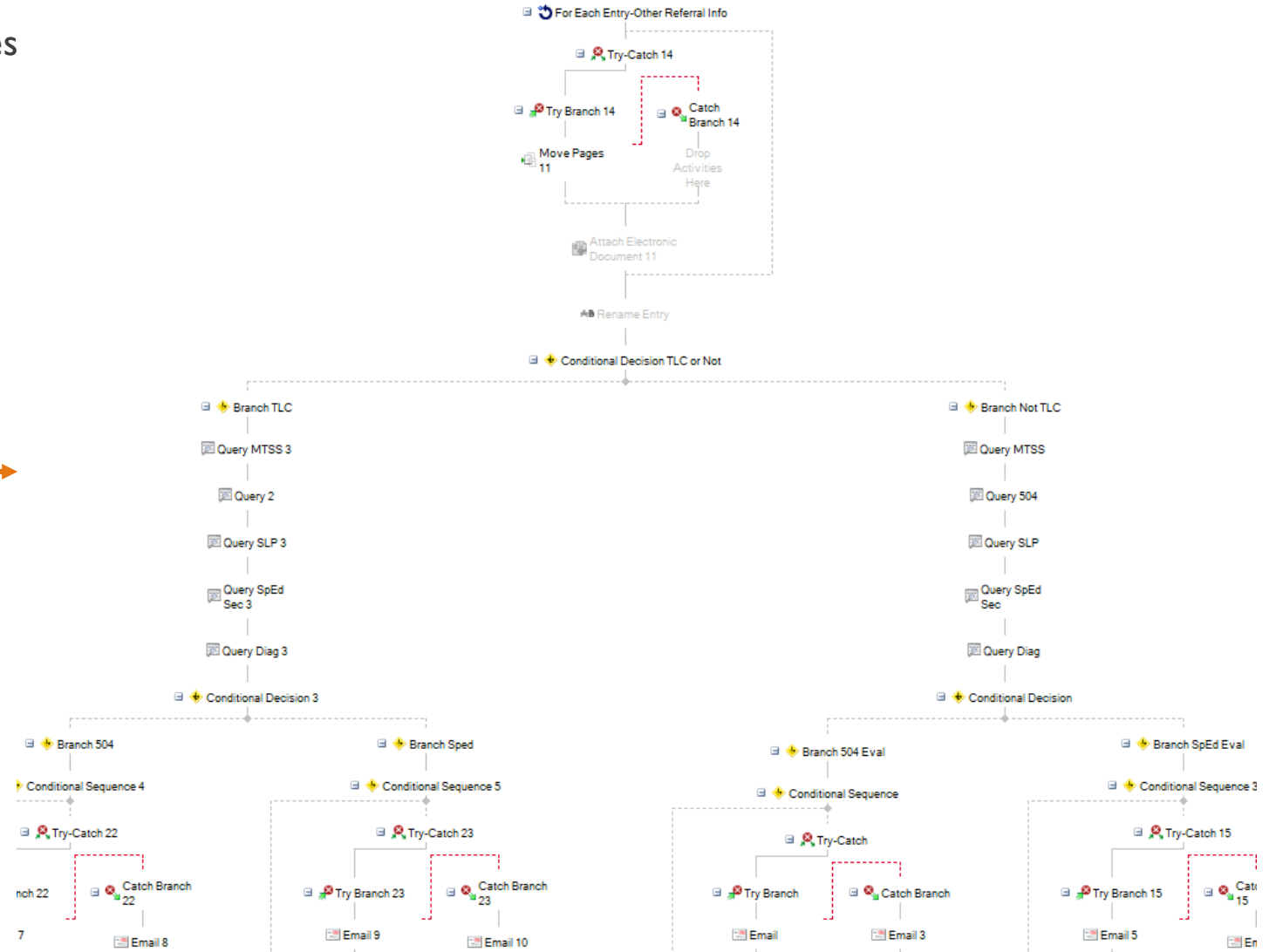
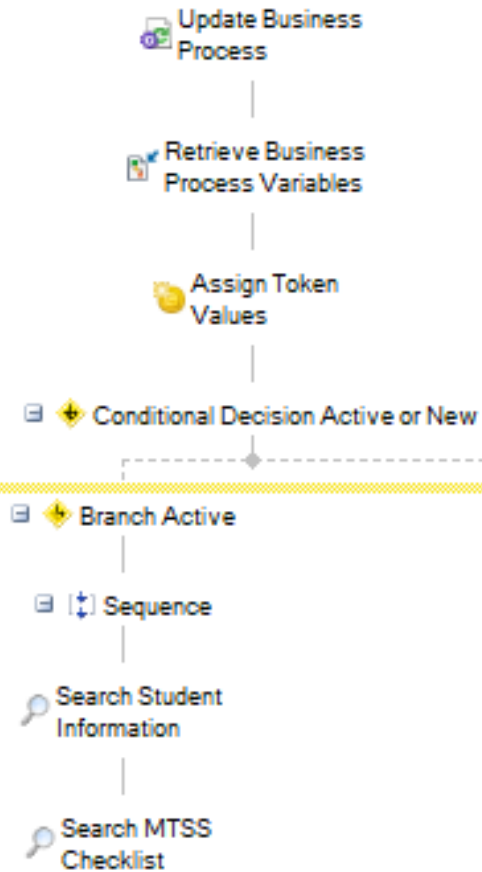
Active Students

WORKFLOWS

SEARCH FOR PARENT
QUESTIONNAIRE (15/5 DAYS)



Workflow – Bundling Student Referral Files



FEEDBACK FROM OTHER DEPARTMENTS



We sent the individual forms to each director of the other departments that played a role in the referral process, explained how it would differ from the previous process, and asked for feedback.

Overall, the feedback was overwhelmingly positive. The directors felt like this new process would provide a clear, consistent process district wide and, most importantly, save their staff time.

- Example- Nurses enter the student's ID number into the Laserfiche form and the rest of the form auto-fills with the correct information if the student had already been screened for hearing/vision.

PILOT

We met as the smaller team again and made updates based on the feedback we received from the larger team.

We then reviewed the whole process from start to finish and made any needed adjustments.

We were ready to pilot this process and selected 3 campuses: 2 elementary and 1 secondary. We trained those staff members and launched the pilot. The trial ran the last few weeks of that school year.





REFLECTION

Over the summer, we met with the Special Education Department to reflect on the pilot, troubleshoot any issues, and discuss the full rollout of this process, as well as the additional training that would be needed as part of the full rollout.

Additional Laserfiche forms were created as part of the troubleshooting process such as a Resend Parent Questionnaire Form and a Re-bundle Packet Form.

OFFICIAL LAUNCH

The official launch started the first day of the new school year.

The beginning of the school year is a heavy referral period so there was a lot of discussion about the timing of the full launch. Ultimately, the positives outweighed any potential negatives, and the team decided that the first day of school was the correct time to officially launch this new referral packet process.



FULL IMPLEMENTATION SUCCESS

"This is like Christmas!!"

-Cindy Masek, MTSS Specialist

"The switch from paper to Laserfiche has had a positive impact on my workday. Under the paper process, I spent too much time chasing down parts of the referral packet, replacing copies that staff had misplaced, etc. The scanning process was also time consuming, particularly if it was 25-30 pages long with work samples. I feel the Laserfiche process has streamlined everything."

-Alison Hawver, MTSS Specialist

"I feel like I am missing something. This just feels too easy!"

-Lindsey Nelson, MTSS Specialist

"With the implementation of the digital referral process through Laserfiche, our initial referral packets are now more efficient and organized than ever. Referral documents adhere to set timelines, automatically sending documents and reminders to staff, administrators, and specialists to ensure timely completion and submission. Additionally, the system generates a record of each initial referral for our campus and timestamps these documents for future review. This streamlined process has significantly saved time by facilitating and tracking every referral step."

-Brittany Dimitri, Lead MTSS Specialist





ENSURING CONTINUED SUCCESS

Ongoing Monitoring

- Meetings as needed to adjust/update process
- Monitor access in Laserfiche for the smaller team who had been on the project since the beginning
- Weekly Laserfiche reports emailed to applicable leadership in various departments

Future Projects

- Section 504 re-evaluation process (requested by the staff!)

QUESTIONS



Tammy Yarbrough
tyarbrough@newcaneyisd.org

Evelyn Sifford
esifford@newcaneyisd.org

Sarah Brady
sbrady@newcaneyisd.org

THANK YOU FOR ATTENDING!



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