

Individual Education Plan (Montana)

Last Modified on 05/03/2024 10:16 am CDT

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Tool Search: Special Ed Documents

The Individual Education Plan is used to capture student special education plan information and match the required documentation provided by the state of Montana. This document describes each editor, a description of each field on the editor, and any special considerations and instructions.

The current print format of this document is the **MT IEP**. Plan formats are selected in the [Special Ed Plan Types](#) tool.

Editor Home			
NAME	STATUS	MODIFIED BY	COMPLETED BY
Education Plan	IN PROGRESS	Demo Administrator 3/29/22 10:21 AM	>
Enrollment Information	IN PROGRESS	Demo Administrator 3/29/22 10:14 AM	>
Student Information	IN PROGRESS	Demo Administrator 3/29/22 10:09 AM	>
Parent/Guardian Information	IN PROGRESS	Demo Administrator 3/29/22 10:18 AM	>
Strengths/Concerns/Interests	NOT STARTED		>
Consideration of Special Factors	NOT STARTED		>
Transition Services	NOT STARTED		>

Editor Home

Editor Home

The Editor Home lists the editors available, their status, and Modification and Completion information.

Header	Description
Name	The name of the editor.

Header	Description
Status	<p>The state of the editor. Statuses can be:</p> <ul style="list-style-type: none"> • In Progress indicates a user has entered and saved data in that editor. • Not Started is the default status for all editors. • Complete indicates a user has clicked the Complete button on the editor, and the editor is read-only. This does not lock the editor from further editing but indicates the user considers the editor finished. • Not Needed indicates a user has clicked the Not Needed button on the editor. This is usually done for editors that do not apply to the student. <p>The following statuses are only available for certain state-specific documents:</p> <ul style="list-style-type: none"> • ESign indicates that the editor has functionality related to the eSignature process. See the Nevada Individual Education Plan eSignature Process for additional information. • Complete Pending eSignature indicates the plan has been entered and sent via the Campus Parent portal to the student's guardian for eSignature.
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the Complete button for that editor.

General Information

The following table lists the actions available for the editors. When resizing the window, certain buttons are condensed into a single **Action** button.

Button	Description
Save	<p>Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor.</p> <ul style="list-style-type: none"> • Save captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the Editor Types section for additional information. • Save & Stay captures progress and keeps the user on the current editor. This save button is the default save option and is usually found within the detail screen or list editors, such as Goals and Objectives. • Save & Next captures progress and navigates the user to the next editor. • Save & New captures progress and creates a new record. This save button is usually found within the detail screen of a list editor, such as Goals and Objectives. See the Editor Type section for additional information.

Button	Description
Refresh	Retrieves a new copy of data from the student's record. This includes enrollment, student, parent/guardian, and team member information. This also returns any accidentally deleted records. Manually entered fields do not change when the refresh button is clicked. The user must Save after clicking Refresh to capture changes. A side panel displays a listing of all the student's applicable enrollment records. See the Enrollments tool documentation for additional information.
Cancel	Navigates the user to the Editor Home screen or the List Screen for List editors.
Status	Changes the status of the editor. <ul style="list-style-type: none"> • Complete indicates the editor is finished. This makes the editor read-only. However, this does not lock the editor from further editing. The user must click In Progress to further edit after an editor is marked Complete. • Not Needed indicates the editor does not apply to the student's plan or evaluation. This makes the editor read-only. However, this does not lock the editor from further editing. Click the In Progress button to further edit after an editor is marked Not Needed. • In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made. <p>The following status is only available for the Nevada IEP:</p> <ul style="list-style-type: none"> • Complete Pending eSignature only displays for the Procedural Safeguards, IEP Implementation, and Medicaid Consent editors. This button marks the editor as complete until the parent/guardian electronically signs those sections of the plan via the Campus Parent Portal. See the Nevada Individual Education Plan eSignature Process for additional information.
Print	Prints the entire document.
Editors	Opens a side panel listing all the available editors and their status. Select an editor from this list to navigate to that editor or click Close to collapse the side panel.
Previous	Navigates the user to the previous editor.
Next	Navigates the user to the next editor.

Editor Types

There are two types of editors available: List or Basic editors. When navigating to a Basic editor, the list of fields within the editor is displayed. List editors display a list of all records within that editor. Clicking an existing record or the **New** button opens the detail view for an individual record.

Editor Lock Out and Release Logic

Only one user at a time can actively work on an editor. A person with a padlock icon ()

) displays in the Editors side panel, Editor Home, and List Screen of list editors indicating which editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

Editors that are currently being edited are read-only for all other users. The name of the person working on the editor displays in the header.

To release an editor, the user must:

- navigate to the next editor by clicking **Save and Next** or the **Editors** button and selecting the next editor from the side panel.
- click the **Cancel** button to return to the Editor Home screen.
- log out of the Campus application.
- navigate to a different tool in the Campus application.

Editors are automatically released when the in-application timeout limit has been exceeded. This is a back-end process and is usually around 30-60 minutes.

Template Banks

Certain fields within several editors have an **Add Template** icon that displays next to their name. Clicking this button displays a side panel with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Transition Goals and Services: Postsecondary

Sequence Number: 1

Area*: Postsecondary Education and Training Goal

Goal: Add Template

Reading Goal

Courses of Study: Add Template

Save & Stay | Cancel

Template Banks

Categories	Sequence	Selected Template Bank Values
+ Course of Study English (4 Templates)		No records selected.
+ Course of Study Math (4 Templates)		

Insert Selected Template(s) | Clear Selected Template(s) | Cancel

Template Bank Side Panel

Click the plus (+) icons next to the category to view the available template values.

Template Banks

Categories	Sequence	Selected Template Bank Values										
- Course of Study English (4 Templates) <table border="1"> <thead> <tr> <th>Add</th> <th>Templates</th> </tr> </thead> <tbody> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 10 Grade 10: English 200</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 11 Grade 11: English 300</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 12 Grade 12: English 400</td> </tr> <tr> <td><input type="button" value="Add"/></td> <td>Course of Study 9 Grade 9: English 100</td> </tr> </tbody> </table>	Add	Templates	<input type="button" value="Add"/>	Course of Study 10 Grade 10: English 200	<input type="button" value="Add"/>	Course of Study 11 Grade 11: English 300	<input type="button" value="Add"/>	Course of Study 12 Grade 12: English 400	<input type="button" value="Add"/>	Course of Study 9 Grade 9: English 100	1 <input type="button" value="▲"/> <input type="button" value="▼"/>	Course of Study 9 <input type="button" value="X"/> Grade 9: English 100
Add	Templates											
<input type="button" value="Add"/>	Course of Study 10 Grade 10: English 200											
<input type="button" value="Add"/>	Course of Study 11 Grade 11: English 300											
<input type="button" value="Add"/>	Course of Study 12 Grade 12: English 400											
<input type="button" value="Add"/>	Course of Study 9 Grade 9: English 100											
	2 <input type="button" value="▲"/> <input type="button" value="▼"/>	Course of Study 10 <input type="button" value="X"/> Grade 10: English 200										
	3 <input type="button" value="▲"/> <input type="button" value="▼"/>	Course of Study 11 <input type="button" value="X"/> Grade 11: English 300										
	4 <input type="button" value="▲"/> <input type="button" value="▼"/>	Course of Study 12 <input type="button" value="X"/> Grade 12: English 400										
+ Course of Study Math (4 Templates)												

Expanded Category and Values Selected

Template Bank Categories display on the left and the selected text displays on the right. Click the **Add** button to add the template value. This adds the template to the queue of values on the right. The red **X** removes selected templates while the sequence field can be used to reorder the templates. Another option is to use the up and down arrows next to the sequence field to reorder values.

Click **Cancel** to go back to the document. The **Clear Selected Template(s)** button removes all selected template values from the right selection screen.

Once selections are finalized, click the **Insert Selected Template(s)** button to add the values to the field within the document in the selected order. Template values are separated by carriage returns.

Courses of Study:

Grade 9: English 100

Grade 10: English 200

Grade 11: English 300

Grade 12: English 400

Example Template Bank Selections in the Document

Text Editors

Images should not be inserted into text fields.

Editors

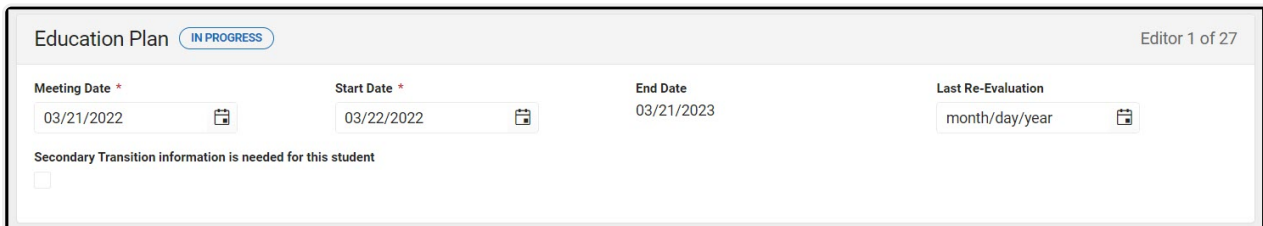
[Education Plan](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [Strengths/Concerns/Interests](#) | [Consideration of Special Factors](#) | [Transition Services](#) | [Postsecondary Goals](#) | [Course of Study](#) | [Transition Services Needed](#) | [Transfer of Rights](#) | [High School Graduation](#) | [PLAAFPs/MAGs](#) | [Progress Report Frequency](#) | [Special Education Services](#) | [Related Services](#) | [Least Restrictive Environment](#) | [Statewide Assessments](#) | [Districtwide Assessments](#) | [Supp. Aids and Services](#) | [Extended School Year](#) | [Need for Reevaluation](#) | [Access. and Responsibilities](#) | [Meeting Participants](#) | [IEP Approval](#) | [Prior Written Notice](#) | [IEP Notes](#)

The following section lists each editor and describes each field on the editor. Available editors include:

Education Plan

The Education Plan editor includes the various dates associated with the plan, why the IEP meeting was held, and how student progress is reported.

This editor must be saved before entering data into other editors.



The screenshot shows the 'Education Plan' editor interface. At the top left, it says 'Education Plan' with a status 'IN PROGRESS' in a blue pill. At the top right, it says 'Editor 1 of 27'. Below this, there are four date fields: 'Meeting Date *' with value '03/21/2022', 'Start Date *' with value '03/22/2022', 'End Date' with value '03/21/2023', and 'Last Re-Evaluation' with value 'month/day/year'. Below these fields is a checkbox labeled 'Secondary Transition information is needed for this student' which is currently unchecked.

Education Plan Editor

▶ [Click here to expand...](#)

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Enrollment Information

The Enrollment Information editor reports Special Education information from the student's Enrollment record. This editor is read only.

The **Refresh** button retrieves a fresh copy of data from the student's record. See the [General](#)

Information section for additional information.

Enrollment Information IN PROGRESS
Editor 2 of 27

Click Refresh to retrieve a new copy of data from a selected Enrollment record.

Primary Disability

School Name Arthur Elementary	School Phone (555)555-7890	Grade KG
---	--------------------------------------	--------------------

District Information

District Number 100	District Name Plainview Schools	District Phone (763)555-5555
District Address 100 Plainview Schools, Plainview, MN 55130		

Enrollment Information Editor

▶ [Click here to expand...](#)

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Student Information

The Student Information editor displays basic information about the student such as demographic information. This is a read-only editor.

The **Refresh** button retrieves a fresh copy of data from the student's record. See the [General Information](#) section for additional information.

Student Information IN PROGRESS
Editor 3 of 27

When a plan is generated, a snapshot of the student's information is taken from Census. Click Refresh to retrieve a new copy of data.

Last Name Abegg	First Name Colton	Middle Name	Suffix
Age 6	Birthdate [REDACTED]	Gender M	
Federal Designation 4: Black or African American	Federal Race(s) 4: Black or African American	Race, Ethnicity (state)	
Address	Student Number [REDACTED]	State ID [REDACTED]	

Case Manager Information

Name	Title
Phone	

Student Information Editor

▶ [Click here to expand...](#)

Parent/Guardian Information

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's [Relationships](#) tool. The editor includes [Demographics](#) information for the student's guardian.

The **Delete** button next to each parent/guardian can be used to remove a parent/guardian from the IEP.

The **Refresh** button retrieves a new copy of parent/guardians' data. This also returns any accidentally deleted people. Manually entered fields do not change when the refresh button is clicked. The user must **Save** after clicking Refresh to capture changes.

Parent/Guardian Information IN PROGRESS
Editor 4 of 27

When a Plan is generated, a snapshot of the parent/guardian information is taken from Census. Individuals with the Guardian check box marked on the Relationship tool for the student display below. Click Refresh to retrieve a new copy of data.

Abegg, Harrison - Father

Print Sequence	<input type="text" value="1"/>	Delete
Address	[REDACTED]	
Home Phone	Work Phone	Cell Phone
(651)555-1694	(555)555-1101	(555)555-1468
E-mail		

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

Strengths/Concerns/Interests

The Strengths/Concerns/Interests editor lists the student's interests according to the student, as well as the student's strengths and needs according to the student's parents and school staff.

Strengths/Concerns/Interests NOT STARTED
Editor 5 of 27

Student perception of strengths, preferences and interests: *

❗ Student perception of strengths, preferences and interests is required

Parent perception of student strengths: *

School staff perception of student strengths: *

Strengths/Concerns/Interests

[▶ Click here to expand...](#)

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Consideration of Special Factors

The Consideration of Special Factors editor is used to document the special factors the team is considering when developing the student's plan.

Consideration of Special Factors NOT STARTED
Editor 6 of 27

Any items marked yes must be addressed in the IEP.

The student's behavior impedes his/her learning or that of others. *

▼

The student has communication needs. *

▼

The student requires assistive technology devices or services. *

▼

EL status has changed since the editor was last saved. Resave the editor to update the printed document.

Has the student been determined to be an 'English Learner'? * ❗

NO

The following information is for students with Blindness or Visual Impairment.

Not Applicable

The student needs training in orientation and mobility.

Consideration of Special Factors

[▶ Click here to expand...](#)

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Transition Services

The Transition Services editor is used to document any transition services to be provided to the

student.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Transition Services Editor 7 of 27

Student's Desired Post-School Activities

In the areas of postsecondary education, vocational education, integrated employment (including supported employment), continuing and adult education, adult services, independent living or community participation.

Results of Age-Appropriate Transition Assessments

Training

Education

Transition Services Editor

▶ [Click here to expand...](#)

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Postsecondary Goals

The Postsecondary Goals editor describes measurable goals set for the student's postsecondary transition in the areas of Training and Education, Employment, and Independent Living Skills.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Postsecondary Goals NOT STARTED
Editor 8 of 27

Measurable postsecondary goals are based on age-appropriate transition assessments related to training, education, employment, and, if appropriate, independent living skills. Clearly specify the desired level of achievement.

Training or Education

Employment

Where appropriate, Independent Living Skills

Postsecondary Goals Editor

[Click here to expand...](#)

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Course of Study

The Course of Study editor lists the courses taken by the student in each school year and the credits earned for each course, and basic graduation information including graduation date and total credits earned and needed.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Course of Study

Anticipated Graduation Date

Credits Earned to Date **Total number of credits for graduation *** **Total Credits** 0.00

School Year:

School Year

Semester	Course	Credits
No records saved.		

0 - 0 of 0 items

Course of Study

[▶ Click here to expand...](#)

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Transition Services Needed

The Transition Services Needed editor lists the services provided to the student to help meet post-secondary goals in the areas of Instruction, Employment, Community Experiences, Post School Adult Living, Related Services, Daily Living Skills, and Functional Vocational Assessment.


This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.


Transition Services Needed
IN PROGRESS
Editor 10 of 27

Each area must be considered by the IEP Team.

Instruction


Discussed, not needed

Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement) 

Person or Agency Responsible 

Employment

Discussed, not needed

Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement) 

Transition Services Needed

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Transfer of Rights

The Transfer of Rights editor indicates when the student was notified of the transfer of rights that occurs when the student turns 18.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Transfer of Rights NOT STARTED
Editor 11 of 27

The student has been informed of his or her rights under IDEA that will transfer to the student on reaching the age of majority. The student must be informed at least one year before the student reaches age 18.

Date student was informed of the transfer of rights

month/day/year

Date student reaches the age of majority

06/10/2029

Transfer of Rights Editor

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High School Graduation

The High School Graduation editor indicates whether the student will or will not meet the district's graduation requirements and receive a diploma.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

High School Graduation NOT STARTED
Editor 12 of 27

This high school graduation section is to be completed during the student's **senior year** for the purpose of determining if the student will be returning to receive special education services the **next** school year for an additional year of high school. All students receiving special education services must have a current Individualized Education Program with measurable annual goals until the day they graduate or age out.

- The student is expected to graduate with a regular diploma at the end of the current school year. After graduating with a regular diploma, the student will no longer be entitled to special education services. This action constitutes a change in educational placement and documentation is included in the prior written notice. Upon graduation, the school district will provide the student with a Summary of Performance.
- The student is not expected to graduate with a regular diploma at the end of the current school year and will return the following school year. The IEP team must develop an Individualized Educational Program for the **next** school year. Documentation is included in the prior written notice.
- The student is not expected to graduate with a regular diploma at the end of this school year. The district will not provide special education services for the next school year due to the district's policy on the age through which educational services are available. This action constitutes a change in educational placement and documentation is included in the prior written notice. Upon aging out, the school district will provide the student with a Summary of Performance.

High School Graduation Editor

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PLAAFPs/MAGs

The PLAAFPs and MAGs editor includes the student's present levels of academic achievement and

functional performance, including skills and needs, and Measurable Annual Goals to chart student progress.

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Progress Report Frequency

The Progress Report Frequency editor records how often progress reports are provided to the parents describing progress towards annual goals.

Progress Report Frequency
NOT STARTED
Editor 14 of 27

When will progress reports on the measurable annual goal(s) be provided to the parents?

Quarter ▼

Progress Report Frequency

[▶ Click here to expand...](#)

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Special Education Services

The Special Ed Services editor lists services provided to the student in a Special Education setting.

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Related Services

The Related Services editor lists developmental, corrective or other supportive services required to assist the student with a disability.

[▶ Click here to expand...](#)

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Least Restrictive Environment

The Least Restrictive Environment editor describes modifications made to the student's educational environment based on special education needs.

Least Restrictive Environment Editor 17 of 27


NOT STARTED


The educational placement is based on the student's IEP.

The educational placement is as close as possible to the student's home.

The educational placement is in the school that the student would attend if he or she did not have a disability.

The IEP team considered any potential harmful effect of the educational placement on the student or on the quality of needed services.

If "No" is checked, explain why. 

If the student's school day or week is shorter or longer than peers without disabilities, explain why. 

Least Restrictive Environment Editor

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Statewide Assessments

The Statewide Assessments editor lists the accommodations in state required assessments.

[▶ Click here to expand...](#)

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Districtwide Assessments

The Districtwide Assessments editor lists student's level of participation or accommodation in district-required assessments.

[▶ Click here to expand...](#)

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Supp. Aids and Services

The Supplementary Aids and Services editor lists the accommodations and modifications made to assist the student in participating in regular education.

[▶ Click here to expand...](#)

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Extended School Year

The Extended School Year editor indicates if the student requires services beyond the standard school time, such as beyond school hours or during breaks.

Extended School Year Editor 21 of 27

NOT STARTED

The need for Extended School Year Services

Describe in Detail the Extended School Year Services 📄

Extended School Year Editor

▶ [Click here to expand...](#)

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Need for Reevaluation

The Need for Reevaluation editor indicates if a reevaluation is necessary.

Only one option can be selected for the "Is a reevaluation necessary at this time?" field.

Need for Reevaluation Editor 22 of 27

NOT STARTED

Reevaluations must occur at least once every three years, unless the parent and the school district agree that a reevaluation is unnecessary. Reevaluations help determine:

- whether the child continues to have a disability and needs special education;
- whether any additions or modifications to the special education and related services are needed to enable the child to meet the measurable annual goals, and to participate, as appropriate, in the general education curriculum; or
- the parent has requested a reevaluation.

Is a reevaluation necessary at this time?

A reevaluation is necessary at this time.

The parent and the school district agree that a reevaluation is unnecessary at this time.

Need for Reevaluation Editor

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Access. and Responsibilities

The Accessibility and Responsibilities editor describes how educational professionals will be notified of their responsibilities regarding the student's special education needs.

Accessibilities and Responsibilities Editor 23 of 27

NOT STARTED

How will each teacher, related service provider, transportation provider and others working with this student be informed of his or her specific responsibilities for implementing this IEP and the accommodations, modifications, and supports that must be provided for this student?

- Copy of Accommodations/Modifications handout
- E-mail
- Verbal Communication
- Other

Accessibilities and Responsibilities Editor

[▶ Click here to expand...](#)

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Meeting Participants

The Meeting Participants editor lists the team meetings held regarding the student, including individuals who were invited and who attended.

Team members added on the [Team Members](#) tool can be added to team meetings. Team members can be added manually on this editor, but are not saved in the system and have to be created each time they are included in a meeting.

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IEP Approval

The IEP Approval editor indicates if the case manager accepts and approves of the IEP.

IEP Approval Editor 25 of 27

IN PROGRESS

I have read and understand my rights as provided to me in the pamphlet "Procedural Safeguards in Special Education under IDEA", which I received this school year. The parent shall be given a copy of this IEP at no cost to the parent.

Approval Decision

- I approve of this Individualized Education Program
- I approve of this Individualized Education Program with the following exceptions.

IEP Approval Editor

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Prior Written Notice

The Prior Written Notice editor provides a space for descriptions and explanations related to proposed or refused actions for a student.

Prior Written Notice NOT STARTED
Editor 26 of 27

Action(s) Proposed or Refused

Initiation or change in the educational placement of the student

Initiation or change in the provision of the FAPE to the student

Description of the specific proposed or refused action(s):*

Additional Documentation attached

Explanation of why the district proposed or refused to take the action(s):*

Prior Written Notice

▶ [Click here to expand...](#)

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IEP Notes

The IEP Notes editor provides a space for any other relevant meeting notes to be included in the IEP.

Meeting Notes should be used to record:

- Any discussion of options considered, options rejected, and reasons for rejection of proposals for initiating or changing the student's identification, evaluation, educational placement or the provision of FAPE;
- Necessary information regarding IEP services not recorded elsewhere in the IEP document; and
- If the meeting was rescheduled, reason for rescheduling.

Meeting Notes should be used to record:

- Any discussion of options considered, options rejected, and reasons for rejection of proposals for initiating or changing the student's identification, evaluation, educational placement or the provision of FAPE;
- Necessary information regarding IEP services not recorded elsewhere in the IEP document; and
- If the meeting was rescheduled, reason for rescheduling

Meeting Notes

IEP Notes

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Previous Versions

[Individual Education Plan \(Montana\) \[.2239 - .2243\]](#)

[Individual Education Plan \(Montana\) \[.2223 - .2235\]](#)