

# Individual Education Plan (Montana)

Last Modified on 03/06/2025 12:45 pm CST

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, each field on the editor, and any special considerations and instructions. For information on general functionality, navigation, and additional plan and evaluation features, see the core [Plan and Evaluation Information](#) article.

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	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 10:21 AM	>
Enrollment Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 10:14 AM	>
Student Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 10:09 AM	>
Parent/Guardian Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 10:18 AM	>
Strengths/Concerns/Interests	<span>NOT STARTED</span>		>
Consideration of Special Factors	<span>NOT STARTED</span>		>
Transition Services	<span>NOT STARTED</span>		>

*Editor Home*

## 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.

Education Plan Editor 1 of 27

**Meeting Date \***   **Start Date \***  **End Date**  **Last Re-Evaluation**

Secondary Transition information is needed for this student

*Education Plan Editor*

▶ [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
<b>Meeting Date</b> <i>Required</i>	The day the team met.	Learner Planning > Learning Plans > meetingDate	N/A
<b>Start Date</b> <i>Required</i>	The day on which the plan begins for the student.	Learner Planning > Learning Plans > planStartDate	This field auto-populates to one day after the Meeting Date.
<b>End Date</b> <i>Required</i>	The last day when the plan ends for the student.	Learner Planning > Learning Plans > planEndDate	This field auto-populates to one year after the Meeting Date.
<b>Last Re-Evaluation</b>	The day of the student's most recent evaluation.	N/A	This field auto-populates with the date of the most recent locked Evaluation.

Field	Description	Ad Hoc	Validation
<b>Secondary Transition information is needed for this student:</b>	Indicates the student needs a secondary transition documented.	N/A	<p>This checkbox defaults to marked for students who are 15 years old and older. This cannot be changed if the student meets the age criteria.</p> <p>When marked, the following editors become available:</p> <ul style="list-style-type: none"> <li>• Transition Services</li> <li>• Postsecondary Goals</li> <li>• Course of Student</li> <li>• Transition Services Needed</li> <li>• Transfer of Rights</li> <li>• High School Graduation</li> </ul> <p>This checkbox can be selected and de-selected for student's younger than 15.</p>

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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**

<b>School Name</b> Arthur Elementary	<b>School Phone</b> (555)555-7890	<b>Grade</b> KG
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**District Information**

<b>District Number</b> 100	<b>District Name</b> Plainview Schools	<b>District Phone</b> (763)555-5555
<b>District Address</b> 123 Main Street, Suite 100, MN 55555		

*Enrollment Information Editor*

▶ [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
<b>Primary Disability</b>	The primary disability of the student.	Learner Planning > Learning Plans > disability1	<p>This field is pulled from the most recent locked evaluation.</p> <p>This field is read only.</p> <p>Up to 10 disabilities can display if entered on the Evaluation.</p> <ul style="list-style-type: none"> <li>• Multiple Disabilities are primary when there are more than one and Deaf/Blindness or Developmental Delay are NOT listed.</li> <li>• When Deaf/Blindness or Developmental Delay are listed as a disability, one of these would be the Primary.</li> </ul>
<b>School Name</b>	The name of the school associated with the student's Enrollment record.	Learner Planning > Learning Plans > servingSchoolName	This field is pulled from the Enrollment record. This field is read only.

Field	Description	Ad Hoc	Validation
<b>School Phone</b>	The phone number of the school associated with the student's Enrollment record.	N/A	This field is pulled from System Administration > Resources > School > School Phone.  This field is read only.
<b>Grade</b>	The student's current grade.	Enrollment > Grade enrollment.grade	This field is pulled from the Enrollment record. This field is read only.
<b>District Information</b> <i>These fields are read only.</i>			
<b>District Number</b>	The district number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > State District Number
<b>District Name</b>	The district name associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Name
<b>District Address</b>	The district address associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Address
<b>District Phone</b>	The district phone number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Phone

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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.

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

**Case Manager Information**

<b>Name</b>	<b>Title</b>
<b>Phone</b>	

*Student Information Editor*

▶ [Click here to expand...](#)

Field	Description	Ad Hoc
<b>Last Name</b>	The student's last name.	Census > People > Demographics > Last Name identity.lastName
<b>First Name</b>	The student's first name.	Census > People > Demographics > First Name identity.firstName
<b>Middle Name</b>	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
<b>Suffix</b>	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
<b>Age</b>	The age of the student.	Census > People > Demographics > Age
<b>Birthdate</b>	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate
<b>Gender</b>	The student's gender.	Census > People > Demographics > Gender identity.gender
<b>Federal Designation</b>	The student's federal race designation.	Census > People > Demographics > Federal Designation identity.raceEthnicityDetermination
<b>Federal Race(s)</b>	The student's federal race(s).	Census > People > Demographics > Race(s) identity.raceEthnicityFed

Field	Description	Ad Hoc
<b>Race, Ethnicity (state)</b>	The student's state race/ethnicity designation.	Census > People > Demographics > Race/Ethnicity Determination identity.raceEthnicity
<b>Address</b>	The student's address.  This field becomes a dropdown when more than one address exists for the student. The primary household displays by default.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; address.city; address.state; address.zip
<b>Student Number</b>	The student's identification number.	Census > People > Demographics > Student Number
<b>State ID</b>	The student's state identification number.	Census > People > Demographics > State ID
<b>Case Manager Information</b> <i>These fields are read-only.</i>		
<b>Name</b>	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
<b>Title</b>	The role of the team member.	Student Information > Special Ed > General > Team Members
<b>Phone</b>	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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## 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 Delete

1

Address

Home Phone (651)555-1694      Work Phone (555)555-1101      Cell Phone (555)555-1468

E-mail

*Parent/Guardian Information Editor*

▶ [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
<b>Last Name</b>	The last name of the parent/guardian.	Census > People > Demographics > Last Name identity.lastName	This field populates from Census. This is part of the header for the parent/guardian.
<b>First Name</b>	The first name of the parent/guardian.	Census > People > Demographics > First Name identity.firstName	This field populates from Census. This is part of the header for the parent/guardian.
<b>Middle Name</b>	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.
<b>Suffix</b>	The suffix of the parent/guardian.	Census > People > Demographics > Suffix Name identity.suffix	This field populates from Census. This is part of the header for the parent/guardian.
<b>Relationship</b>	The relation of the parent/guardian to the student.	Census > People > Relationships	This field populates from Census. This is part of the header for the parent/guardian.



Field	Description	Ad Hoc	Validation
<b>Sequence</b>	The print order of the parent/guardian(s) on the IEP.	N/A	When no Sequence is selected, parent/guardian(s) print in the order displayed in the UI. When any Sequences are selected, only parent/guardian(s) with a sequence number prints in the order defined.
<b>Address</b>	The parent/guardians' address.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apartment; address.city; address.state; address.zip	This field populates from Census.  When there are multiple addresses for a person, a drop down with an option to select which address displays. When there is only one address, the drop down only has one option. The populated address is the one marked "Primary."
<b>Home Phone</b>	The home phone number of the parent/guardian.	Census > People > Demographics > Household Phone	This field populates from Census.
<b>Work Phone</b>	The work phone of the parent/guardian.	Census > People > Demographics > Work Phone	This field populates from Census.
<b>Cell Phone</b>	The cell phone of the parent/guardian.	Census > People > Demographics > Cell Phone	This field populates from Census.
<b>Email</b>	The primary email address for the parent/guardian.	Census > People > Demographics > Email	This field populates from Census.

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## 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 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...](#)

Field	Description
<b>Student perception of strengths, preferences and interests:</b> <i>Required</i>	A description of the student's strengths as seen by the student.
<b>Parent perception of student strengths:</b> <i>Required</i>	A description of the student's strengths as seen by the student's parent/guardians.
<b>School staff perception of student strengths:</b> <i>Required</i>	A description of the student's strengths as seen by the school staff.
<b>Parent perception of student educational needs:</b> <i>Required</i>	A description of the student's educational needs as seen by the student's parent/guardians.
<b>School Staff perception of student educational needs:</b> <i>Required</i>	A description of the student's educational needs as seen by the school staff.

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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

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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'?\* i

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...](#)

Field	Description	Validation
<b>The student's behavior impedes his/her learning or that of others.</b> <i>Required</i>	Indicates if the student's behavior impedes their learning or the learning of others.	Yes or No
<b>The student has communication needs.</b> <i>Required</i>	Indicates the student has communication needs.	Yes or No
<b>The student requires assistive technology devices or services</b> <i>Required</i>	Indicates the student requires assistive technology devices or services.	Yes or No
<b>Has the student been determined to be an 'English Learner'?</b> <i>Required</i>	Indicates if the student is determined to be an English Learner.	This field is read-only. This field pulls from from Program Participation > English Learners > Program Status.
<b>The following information is for students with Blindness or Visual Impairment.</b>		
<b>Not Applicable</b>	Indicates the student is not Blind or Visually Impaired.	When marked, the following two dropdowns become grayed out.
<b>The student needs training in orientation and mobility. If yes, training must be addressed in the IEP.</b>	Indicates the student requires additional training for orientation and mobility.	Yes or No

Field	Description	Validation
<b>The student needs instruction in Braille or the use of Braille.</b>	Indicates the student requires instruction in Braille.	Yes or No
<b>If no, describe below why instruction in Braille or the use of Braille is not appropriate. This decision must be based on evaluation results.</b> <i>*Required</i>	A description of why Braille is not appropriate for the student.	*This field displays when the above question equals NO and is then required.

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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.

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**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...](#)

Field	Description
<b>Student's Desired Post-School Activities</b>	A description of the student's post-secondary goals.

Field	Description
<b>Results of Age-Appropriate Transition Assessments</b>	
<b>Training</b>	A description of the results of the training transition assessment.
<b>Education</b>	A description of the results of the education transition assessment.
<b>Employment</b>	A description of the results of the employment transition assessment.
<b>Where appropriate, Independent Living Skills</b>	A description of the results of the student's independent living skills assessment.
<b>Results of age-appropriate transition assessments attached.</b>	Indicates an age-appropriate transition assessment has been attached.

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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...](#)

Field	Description
<b>Training or Education</b>	A description of the student's postsecondary goals for training and/or education.
<b>Employment</b>	A description of the student's postsecondary goals for employment
<b>Where appropriate, Independent Living Skills</b>	A description of the student's postsecondary goals for independent living skills.

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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...](#)

Field	Description	Validation
<b>Anticipated Graduation Date</b>	The student's anticipated graduation date.	N/A
<b>Credits Earned to Date</b>	The number of credits the student has earned.	N/A

Field	Description	Validation
<b>Total number of credits for graduation</b> <i>Required</i>	The total number of credits the student needs to graduate.	N/A
<b>Total Credits</b>	The calculated total number of credits the student has earned.	This field is read-only and calculates the number of credits manually entered into the "Credits" fields below.
<b>School Year</b> <i>This section is used to manually enter the student's course and credit information by school year. The "X" button can be used to enter a record. Both "School Year" tables are identical.</i>		
<b>School Year</b>	The school year.	N/A
<b>Semester</b>	The semester when the course took place.	N/A
<b>Course</b>	The name of the course.	N/A
<b>Credits</b>	The number of credits the student earned for the course.	N/A

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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*

▶ [Click here to expand...](#)

*Each area must be considered by the IEP Team:*

- *Instruction*
- *Employment*
- *Community Experiences*
- *Post School Adult Living*
- *Related Services*
- *Daily Living Skills (is appropriate)*
- *Functional Vocational Assessment*

Field	Description	Validation
<b>Discussed, not needed</b>	Indicates this type of transition service is not needed.	When marked, the following two fields are grayed out.
<b>Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement)</b>	A description of the services needed to aid the student in achieving their postsecondary goals.	N/A
<b>Person or Agency Responsible</b>	The person or agency responsible for providing the service to the student.	N/A

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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*

[▶ Click here to expand...](#)

Field	Description	Validation
<b>Date student was informed of the transfer of rights</b>	The date the student was notified of the transfer of rights.	This date must be on or before the meeting date of the Plan.
<b>Date student reaches the age of majority</b>	The day the student reaches 18 years old.	This is a read-only field.

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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*

▶ [Click here to expand...](#)

Field	Validation
<p><b>The student <u>is</u> 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.</b></p>	<p>When marked, the other two checkboxes cannot be selected.</p>
<p><b>The student <u>is not</u> 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.</b></p>	<p>When marked, the other two checkboxes cannot be selected.</p>

Field	Validation
<p><b>The student <u>is not</u> 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.</b></p>	<p>When marked, the other two checkboxes cannot be selected.</p>

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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.

[▶ Click here to expand...](#)

## PLAAFPs/MAGs List Screen

*PLAAFPs/MAGs List Screen*

Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Service Area</b>	The name of the Service Area.

Column Name	Description
<b>Present Level</b>	The student's present level of academic achievement and functional performance.
<b>Goals</b>	The goals associated with the Service Area of Need.

## PLAAFPs/MAGs Detail Screen

**Area of Need**

Service Area of Need \*

Adapted Physical Education

Present Level of Academic Achievement and Functional Performance:

In the section below, please describe the academic, developmental and functional strengths and needs of the student and how the disability affects involvement and progress in the regular curriculum or, for preschool children, involvement in appropriate activities. Test scores alone are insufficient.

---

**Measurable Annual Goals**

Goal	ESY
No records available.	

*PLAAFPs/MAGs Detail Screen*

Field	Description	Validation
<b>Area of Need</b>	<i>This header is replaced with the Service Area of Need when selected.</i>	

Field	Description	Validation
<b>Service Area of Need</b> <i>Required</i>	The area in which the student has need. Options include: <ul style="list-style-type: none"> <li>• Adapted Physical Education</li> <li>• Assistive Technology</li> <li>• Braille Instruction</li> <li>• Career/Vocational</li> <li>• Communication</li> <li>• Counseling</li> <li>• Math</li> <li>• Occupational Therapy</li> <li>• Orientation &amp; Mobility</li> <li>• Physical Therapy</li> <li>• Reading</li> <li>• Rehabilitation Counseling</li> <li>• Self-Help/Independence</li> <li>• Sensory-Motor</li> <li>• Social/Emotional/Behavioral</li> <li>• Speech/Language</li> <li>• Therapeutic Recreation</li> <li>• Transition</li> <li>• Travel Training</li> <li>• Written Expression</li> </ul>	N/A
<b>Present Level of Academic Achievement and Functional Performance:</b>	A description of the student's present level of academic achievement and functional performance.	N/A
<b>Measurable Annual Goals</b> <i>This is a read-only section displaying the goal(s) associated to the area of need as well as any objectives tied to those goals when expanded. Clicking "New" opens a side panel where goals and objectives can be added.</i>		
<b>Measurable Annual Goal and Objectives (side panel)</b>		
<b>Measurable Annual Goal</b>	A description of the student's annual goal associated with this area of need.	N/A
<b>ESY</b>	Indicates this goal is a part of an extended school year program.	N/A
<b>Objectives</b>		
<b>Objective</b>	A description of the student's objective associated with this goal.	N/A

Field	Description	Validation
ESY	Indicates this objective is a part of an extended school year program.	N/A

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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...](#)

Field	Description	Validation
<b>When will progress reports on the measurable annual goal(s) be provided to the parents?</b>	The frequency in which the parent/guardian of the student will be notified of the student's progress toward their annual goals. Options include: <ul style="list-style-type: none"> <li>• Quarter</li> <li>• Semester</li> <li>• Other</li> </ul>	Only one option can be selected. When "Other" is selected, the Specify field displays.
<b>Specify</b>	A description of the notification frequency.	Displays when "Other" is selected above.

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## Special Education Services

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

[▶ Click here to expand...](#)

### Special Education Services List Screen

Special Education Services Editor 15 of 27

IN PROGRESS

Service Name ↑	Time	Start Date	End Date
Assistive Technology	60	03/22/22	03/21/23

1 - 1 of 1 items

*Special Education Services List Screen*

Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Service Provided</b>	The name of the services provided to the student.
<b>Time</b>	The minutes per week of service.
<b>Start Date</b>	The first day of service.
<b>End Date</b>	The last day of service.

## Special Education Services Detail Screen

Special Education Service

Service \* Service Setting \*

Service Position

Duration and Frequency

Start Date \* End Date \* Minutes per week \*

*Special Education Services Detail Screen*

Field	Description	Validation
<b>Service Required</b>	The name of the special education service provided.	Service options available in this dropdown are based on the hard-coded list created in the <a href="#">Special Ed Services</a> tool.

Field	Description	Validation
<b>Service Setting</b> <i>Required</i>	The location of the service. Options include: <ul style="list-style-type: none"> <li>Regular Education Setting</li> <li>Special Education Setting</li> </ul>	N/A
<b>Service Position</b>	The type of staffing position providing the service.	Service Position options available in this dropdown are based on the hard-coded list created in the <a href="#">Special Ed Service Positions</a> tool.
<b>Start Date</b> <i>Required</i>	The first day of service.	This date cannot be before the Start Date of the plan.
<b>End Date</b> <i>Required</i>	The last day of service.	This date cannot be after the End Date of the plan.
<b>Minutes per week</b> <i>Required</i>	The number of minutes per week the student will receive services.	Only whole numbers allowed, up to 5 characters before the decimal point (0 after the decimal).

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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...](#)

## Related Services List Screen

Service Name ↑	Time	Start Date	End Date
Mental Health Services	30	03/22/22	03/21/23

*Related Services List Screen*



Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Service Provided</b>	The name of the services provided to the student.
<b>Time</b>	The number of minutes entered in the detail screen.
<b>Start Date</b>	The first day of service.
<b>End Date</b>	The last day of service.

## Related Services Detail Screen

Related Service

Service \* Service Setting \*

Counseling Special Education Setting

Service Position

Speech Therapy

---

Duration and Frequency

Start Date \* End Date \* Minutes per week \*

09/06/2022 09/05/2023 60

*Related Services Detail Screen*

Field	Description	Validation
<b>Service</b> <i>Required</i>	The name of the special education service provided.	Service options available in this dropdown are based on the hard-coded list created in the <a href="#">Special Ed Services</a> tool.
<b>Service Setting</b> <i>Required</i>	The location of the service. Options include: <ul style="list-style-type: none"> <li>Regular Education Setting</li> <li>Special Education Setting</li> </ul>	N/A
<b>Service Position</b>	The type of staffing position providing the service.	Service Position options available in this dropdown are based on the hard-coded list created in the <a href="#">Special Ed Service Positions</a> tool.
<b>Start Date</b> <i>Required</i>	The first day of service.	This date cannot be before the Start Date of the plan.
<b>End Date</b> <i>Required</i>	The last day of service.	This date cannot be after the End Date of the plan.

Field	Description	Validation
<b>Minutes per week</b> <i>Required</i>	The number of minutes per week the student will receive services.	Only whole numbers allowed, up to 5 characters before the decimal point (0 after the decimal).

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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 NOT STARTED Editor 17 of 27

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

[▶ Click here to expand...](#)

Field	Validation
<b>The educational placement is based on the student's IEP.</b>	Yes or No
<b>The educational placement is as close as possible to the student's home.</b>	Yes or No
<b>The educational placement is in the school that the student would attend if he or she did not have a disability.</b>	Yes or No
<b>The IEP team considered any potential harmful effect of the educational placement on the student or on the quality of needed services.</b>	Yes or No
<b>If "No" is checked, explain why.</b>	N/A
<b>If the student's school day or week is shorter or longer than peers without disabilities, explain why.</b>	N/A

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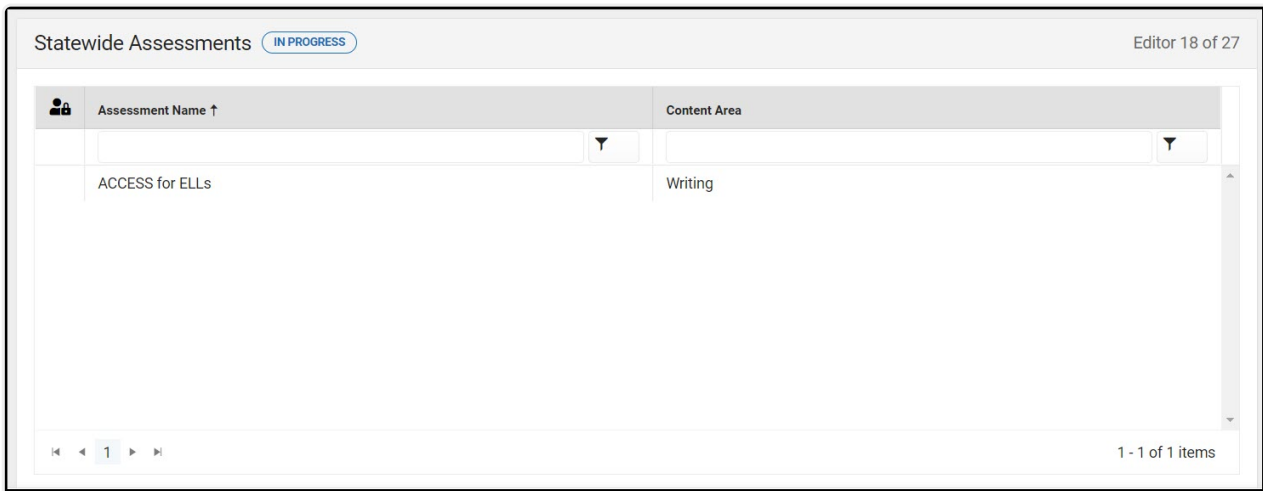
# Statewide Assessments

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

This editor cannot be placed in a Not Needed status.

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

## Statewide Assessments List Screen



*Statewide Assessment List Screen*

Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Assessment Name</b>	The name of the assessment.
<b>Content Area</b>	The content of the assessment.

## Statewide Assessment Detail Screen

**Statewide Assessment**

The selection of accessibility supports (universal features, designated features, accommodations) is a systematic data based process that is made by educators familiar with individual student needs. For English Learners (ELs) and students being served by IEPs, supports should be discussed, selected, and documented at plan meetings. The supports that are provided on statewide assessments must be familiar to the student and match those supports and accommodations that are provided for classroom instruction and assessments throughout the school year.

**Assessment \***      **Assessment Manner \***      **Content Area**  
 ACCESS for ELLs      With Accommodations      Writing

**Support/Accommodation**  
 Individual Setting ×

**Accommodations/support specifics and notes**

Statewide Assessment Detail Screen

Field	Description	Validation
<b>Assessment</b> <i>Required</i>	The name of the assessment. Options include: <ul style="list-style-type: none"> <li>• MAST</li> <li>• Multi-State Alt Assessment (MSSA)</li> <li>• Montana Science (MSA)</li> <li>• Montana Alt Science (AMSA)</li> <li>• Access for ELLs</li> <li>• Alt Access for ELLs</li> <li>• ACT with Writing</li> <li>• Not Applicable (N/A)</li> </ul>	A selection must be made in order to Complete the editor.
<b>Assessment Manner</b> <i>Required</i>	The method in which the assessment was administered. Options include: <ul style="list-style-type: none"> <li>• Without Accommodations</li> <li>• With Accommodations</li> <li>• Alternate</li> </ul>	Options available in the dropdown are determined by the Assessment selected above.
<b>Content Area</b>	The content of the assessment.	The values available in the dropdown are determined based on the Assessment and Test Manner selected. See the table below.

Field	Description	Validation
<b>A student with a significant cognitive disability may be eligible to take the alternate statewide assessment if the IEP team determines that the student meets all the following criteria:</b>	<p>Options include:</p> <ul style="list-style-type: none"> <li>The student has an active IEP and receives services under the Individuals with Disabilities Education Act (IDEA).</li> <li>The student's demonstrated cognitive abilities and adaptive behavior require substantial adjustments to the general curriculum.</li> <li>The student's learning objectives and expected outcomes focus on functional application of skills, as illustrate in the student's annual goals and short-term objectives.</li> <li>The student requires direct and extensive instruction to acquire, maintain, generalize and transfer new skills.</li> </ul>	<p>These checkboxes are only available when "Alternate" is selected from the Assessment Manner dropdown.</p> <p>All checkboxes must be marked.</p>
<b>Support/Accommodation</b>	The type of support or accommodation.	N/A
<b>Accommodations/support specifics and notes</b>	Any additional information regarding the support or accommodations.	N/A

The following table represents which fields display based on the Assessment and Assessment Manner selected (as indicated with an "X"):

Assessment	Assessment Manner	Content Area	A student with significant cognitive disability...	Support	Specifics & Notes
<b>MAST</b>	Without	<ul style="list-style-type: none"> <li>ELA</li> <li>Math</li> </ul>		X	X
	With	<ul style="list-style-type: none"> <li>ELA</li> <li>Math</li> </ul>		X	X

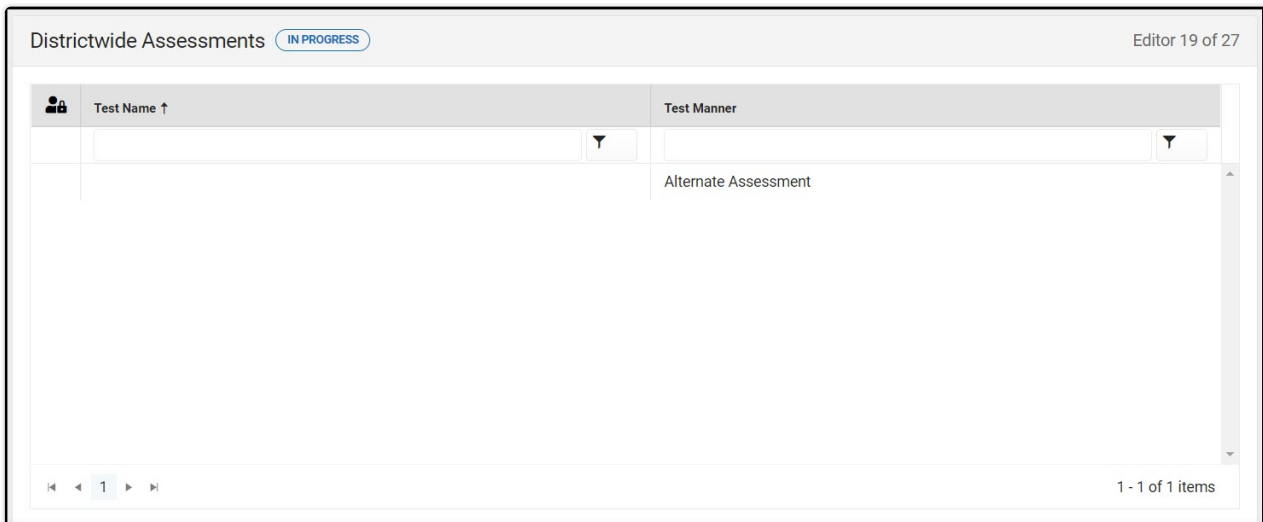
Assessment	Assessment Manner	Content Area	A student with significant cognitive disability...	Support	Specifics & Notes
<b>Multi-State Alt Assessment (MSSA)</b>	Alternate	<ul style="list-style-type: none"> <li>• ELA</li> <li>• Math</li> </ul>	X	X	X
<b>Montana Science</b>	Without	<ul style="list-style-type: none"> <li>• Science</li> </ul>			
	With	<ul style="list-style-type: none"> <li>• Science</li> </ul>		X	X
<b>Montana Alt Science</b>	Alternate	<ul style="list-style-type: none"> <li>• Science</li> </ul>	X	X	X
<b>ACCESS for ELLs</b>	Without	<ul style="list-style-type: none"> <li>• Listening</li> <li>• Speaking</li> <li>• Reading</li> <li>• Writing</li> </ul>			
	With	<ul style="list-style-type: none"> <li>• Listening</li> <li>• Speaking</li> <li>• Reading</li> <li>• Writing</li> </ul>		X	X
<b>Alternate ACCESS for ELLs</b>	Alternate	<ul style="list-style-type: none"> <li>• Listening</li> <li>• Speaking</li> <li>• Reading</li> <li>• Writing</li> </ul>	X	X	X
<b>ACT with Writing</b>	Without	<ul style="list-style-type: none"> <li>• Reading</li> <li>• English</li> <li>• Mathematics</li> <li>• Science</li> <li>• Writing</li> </ul>			
	With	<ul style="list-style-type: none"> <li>• Reading</li> <li>• English</li> <li>• Mathematics</li> <li>• Science</li> <li>• Writing</li> </ul>		X	X
<b>Smarter Balanced</b>	Without	<ul style="list-style-type: none"> <li>• ELA</li> <li>• Math</li> </ul>			
	With	<ul style="list-style-type: none"> <li>• ELA</li> <li>• Math</li> </ul>		X	X

## Districtwide Assessments

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

▶ [Click here to expand...](#)

### Districtwide Assessments List Screen



*Districtwide Assessments List Screen*

Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Test Name</b>	The name of the assessment.
<b>Test Manner</b>	The method in which the assessment is administered.

### Districtwide Assessments Detail Screen

Districtwide Assessment

The student will participate in the Districtwide assessments in the following manner

Test Name

Accommodations

*Districtwide Assessments Detail Screen*

Field	Description	Validation
<b>The student will participate in the Districtwide assessments in the following manner</b>	Indicates how the student will participate in the district-wide assessment. Options include: <ul style="list-style-type: none"> <li>Without Accommodations</li> <li>With Accommodations</li> <li>Alternate Assessment</li> <li>N/A (only for students not taking a districtwide assessment)</li> </ul>	Only one option can be selected at a time. A selection must be made in order to Complete the editor.
<b>Test Name</b>	The name of the assessment.	This field is grayed out when "N/A" is selected above.
<b>Accommodations</b>	The type of accommodation.	This field is grayed out when "N/A" or "Without Accommodations" is selected above.

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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...](#)

## Supp. Aids and Services List Screen



Supp. Aids and Services Editor 20 of 27

IN PROGRESS

🔒	Content Area	Notes
🔒	Instructional	

1 - 1 of 1 items

*Supp. Aids and Services List Screen*

Column Name	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Content Area</b>	The area addressed by the supplementary aid and services.
<b>Notes</b>	Any additional information regarding the supplemental aids and services.

## Supp. Aids and Services Detail Screen

Supp. Aids and Services

This section includes the accommodations, modifications, supplemental aids and services, assistive technology devices, staff and parent training, etc. that the student will need to be successful in the general education classroom.

Tips:

- The plan needs to be specific and based on the identified learning issues of the student. All students should not have the same list.
- The plan must specify when accommodations will occur, rather than saying "as needed". Example: Extended time on tests (30 minutes)
- Make sure that everyone who works with the student is aware of these items and is utilizing them, including classroom teachers, bus drivers, playground aids, etc.
- If parent counseling or training will be provided, indicate the nature of the training and who will provide the training. Example: The school psychologist will provide parent training on the educational needs of students with autism.
- The team can make the decision that no supplemental aids and services are needed, but it must be discussed and documented by selecting "None needed" under the Content Area box.

Content Area

Instructional ▼

Notes 📄

*Supp. Aids and Services Detail Screen*

Field	Description
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Field	Description
<b>Content Area</b>	The area addressed by the supplementary aid and services. Options include: <ul style="list-style-type: none"> <li>• Instructional</li> <li>• Classroom Assessment</li> <li>• Personnel</li> <li>• Parent</li> <li>• None Needed</li> </ul>
<b>Notes</b>	Any additional information regarding the Supplemental Aids and Services.

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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

**The need for Extended School Year Services**

**Describe in Detail the Extended School Year Services**

*Extended School Year Editor*

[▶ Click here to expand...](#)

Field	Description	Validation
<b>The need for Extended School Year Services</b>	Indicates the student requires an Extended School Year service. Options include: <ul style="list-style-type: none"> <li>• are not necessary for the student</li> <li>• are necessary for the student</li> <li>• will be determined by a later date</li> </ul>	When "will be determined by a later date" is selected, the "Date determination will be made by" field displays.
<b>Date determination will be made by:</b>	The date the ESY service determination will be determined.	This field display when "will be determined by a later date" is selected above.

Field	Description	Validation
<b>Describe in Detail the Extended School Year Services</b>	A description of the service.	N/A

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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

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

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...](#)

Field	Description	Validation
<b>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?</b>	Indicates how educational professional will be notified of their responsibilities regarding the student's education needs. Options include: <ul style="list-style-type: none"> <li>• Copy of Accommodations/Modifications handout</li> <li>• E-mail</li> <li>• Verbal Communication</li> <li>• Other:</li> </ul>	Multiple options can be selected.
<b>Specify:</b>	A description of the method for providing information to educational professionals.	N/A

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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.

[▶ Click here to expand...](#)

## Meeting Participants List Screen

Meeting Participants IN PROGRESS Editor 24 of 27

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Meeting Date ↑
Print In Plan

02/07/2022
 ON

---

1 - 1 of 1 items

Meeting Participants List Screen

Column Name	Description
Padlock Icon	The user currently editing the record.
Meeting Date	The date of the meeting.
Print in Plan	Indicates this record prints.

## Meeting Participants Detail Screen

Team Meeting: 2/7/2022

---

Print in Plan 
Meeting Date \*

---

Attendance ⓘ

First Name *	Last Name *	Role Name	Invited	Attended	
Glissa-Jean	Abegg	<input type="text" value="Mother/Son"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Harrison	Abegg	<input type="text" value="Father/Son"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Saul	Chalwerk	<input type="text" value="Social Worker"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Alexander	Hamilton	<input type="text" value="Principal (ADVISORSTAFF)"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Meeting Participants Detail Screen

Field	Description	Validation
Print in Plan	Indicates this record prints.	N/A
Meeting Date <i>Required</i>	The date of the meeting.	N/A

Field	Description	Validation
<b>Attendance</b>		
<b>First Name</b> <i>Required</i>	The first name of the team member.	N/A
<b>Last Name</b> <i>Required</i>	The last name of the team member.	N/A
<b>Role</b>	The role of the team member.	This field pulls in the Title in from the <a href="#">Team Members</a> tool, but can be modified as needed.
<b>Invited</b>	Indicates the team member was invited to the meeting.	Determines whether or not the team member displays on print.
<b>Attended</b>	Indicates the team member attended the meeting.	N/A
<b>Delete Button</b>	Removes the participant from the meeting.	N/A
<b>Add</b>	Creates a new participant to participate in the meeting who is not listed on the Team Members tool.	N/A
<b>Refresh</b>	Refreshes the team member list and sets any records originally brought in back to their original status.	N/A

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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*

[▶ Click here to expand...](#)

Fields	Description	Validation
<b>Approval Decision</b>	Indicates the IEP approval status. Options include: <ul style="list-style-type: none"> <li>• I approve of this Individualized Education Program.</li> <li>• I approve of this Individualized Education Program with the following exceptions.</li> </ul>	Only one option can be selected.
<b>The IEP team agrees to meet again to resolve differences regarding the exceptions below.</b> <i>*Required</i>	The date the IEP approval determination will be made.	*This field becomes available and is required when the second check box is selected above.
<b>Exceptions:</b> <i>*Required</i>	A description of the exceptions.	*This field becomes available and is required when the second check box is selected above.

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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...](#)

Field	Description
<b>Action(s) Proposed or Refused</b>	Indicates the type of action proposed or refused. Options include: <ul style="list-style-type: none"> <li>• Initiation or change in the educational placement of the student.</li> <li>• Initiation or change in the provision of the FAPE to the student</li> </ul>
<b>Description of the specific proposed or refused action(s):</b> <i>Required</i>	A description of the proposed or refused actions.
<b>Additional Documentation attached</b>	Indicates additional documentation is attached to the IEP.
<b>Explanation of why the district proposed or refused to take the action(s):</b> <i>Required</i>	A description of why the district proposed or refused to take the proposed actions.
<b>Additional Documentation attached</b>	Indicates additional documentation is attached to the IEP.
<b>Description of each evaluation procedure, assessment, record, or report the district used as a basis for the proposal or refusal:</b> <i>Required</i>	A description of the evidence provided used as a basis for the proposal or refusal.
<b>Additional Documentation attached</b>	Indicates additional documentation is attached to the IEP.
<b>Description of any other options the district considered and the reasons why those options were rejected:</b> <i>Required</i>	A description of alternative options the district considered.
<b>Additional Documentation attached</b>	Indicates additional documentation is attached to the IEP.
<b>Description of other factors relevant to the district's proposal or refusal to take the action:</b> <i>Required</i>	A description of any other factors involved in the district's decision.
<b>Additional Documentation attached</b>	Indicates additional documentation is attached to the IEP.

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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.

IEP Notes NOT STARTED
Editor 27 of 27

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

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