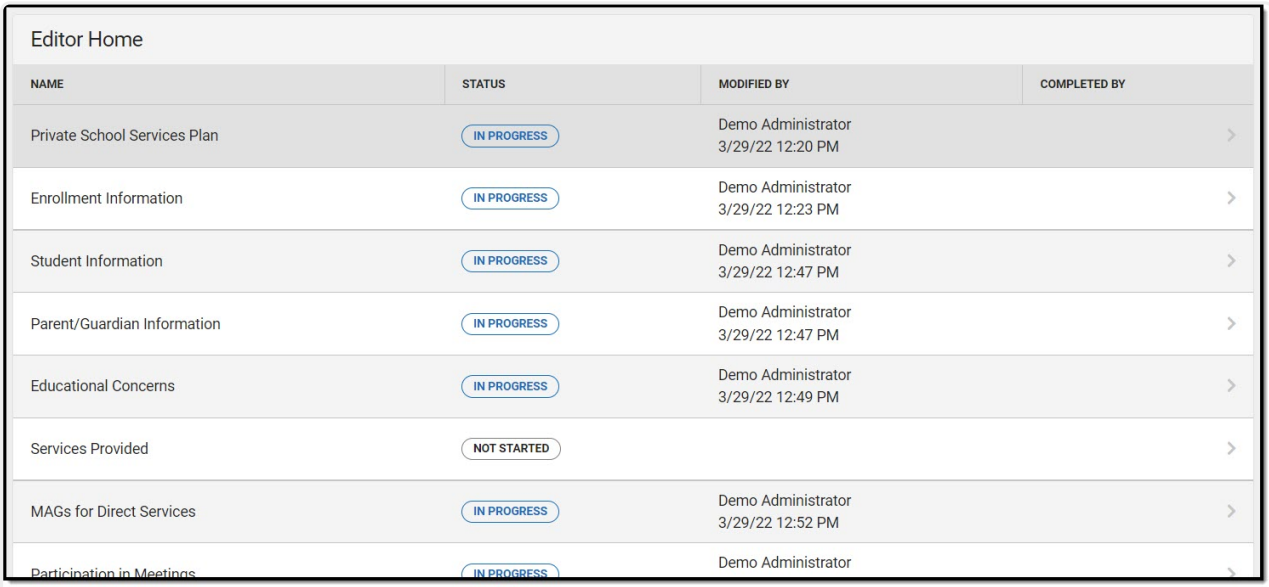
Private School Plan (Montana)

Last Modified on 06/29/2026 10:58 am CDT

Tool Search: Special Ed Documents

The Private School Plan captures student special education plan information and matches 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. For information on general functionality, navigation, and additional plan and evaluation features, see the core Plan and Evaluation Information article.

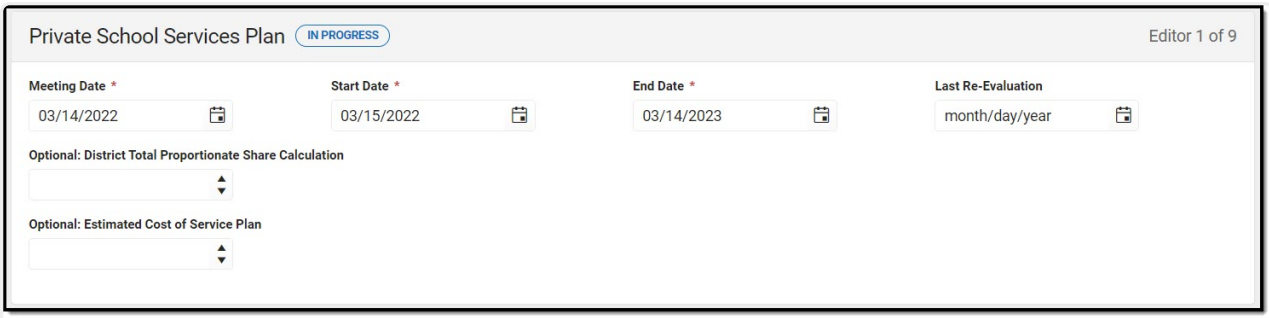
The current print format of this document is the **MT PSP 2022.2**. Plan formats are selected in the Special Ed Plan Types tool.



Editor Home

Private School Services Plan

The Private School Services Plan editor provides basic information regarding the plan.



Private School Services Plan

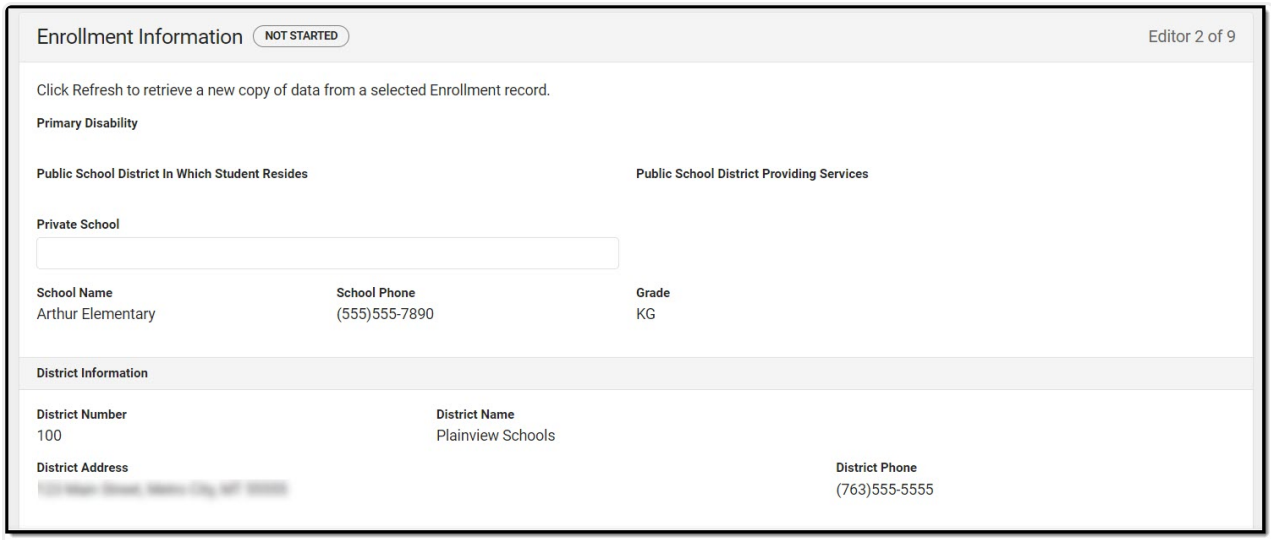
Click here to expand...

Field	Description	Validation
Meeting Date *Required*	The date of the meeting.	N/A
Start Date *Required*	The first day of the plan.	This field auto populates to one day after the Meeting Date.
End Date *Required*	The last day of the plan.	This field auto populates to one year from the Meeting Date.
Last Re-Evaluation:	The date the student was last evaluated.	This field auto populates to the date of the most recent, locked Evaluation.
Optional: District Total Proportionate Share Calculation	The shared time between public and private school(s).	Decimals are allowed in this field.
Optional: Estimated Cost of Service Plan	The estimated cost of the plan.	Decimals are allowed in this field.

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 Editor

Click here to expand...

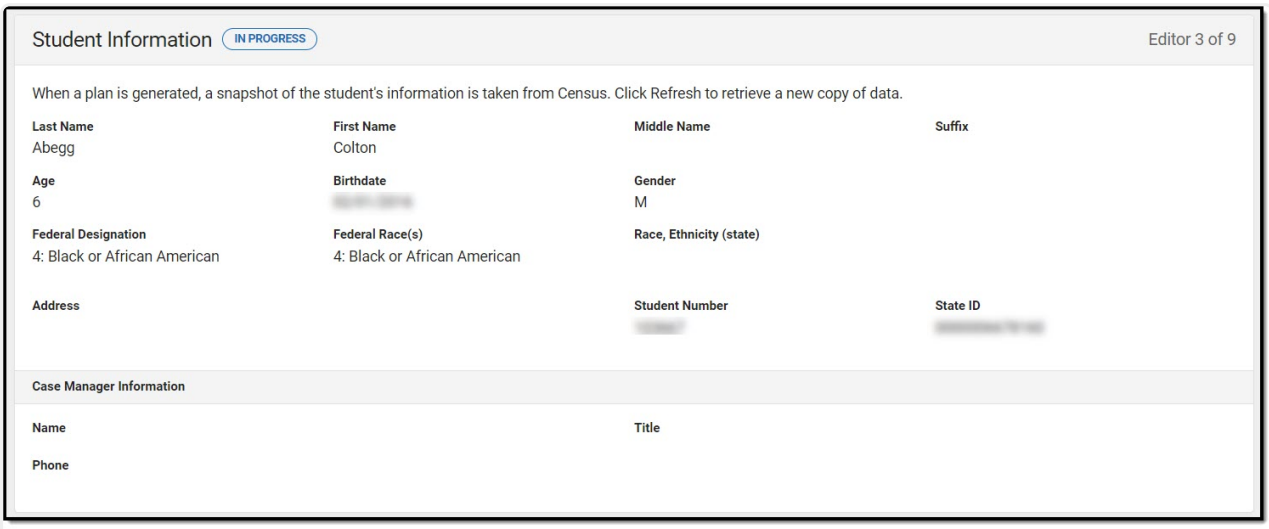
Field	Description	Ad Hoc	Validation
Primary Disability	The primary disability of the student.	Learner Planning > Learning Plans > disability1	This field is pulled from the most recent locked evaluation. Up to 10 disabilities can display if entered on the Evaluation. • Multiple Disabilities are primary when there are more than one and Deaf/Blindness or Developmental Delay are NOT listed. • When Deaf/Blindness of Developmental Delay are listed as a disability, one of these would be the Primary.

Field	Description	Ad Hoc	Validation
Public School District in Which Student Resides	The location at which the student resides.	N/A	N/A
Public School District Providing Services	The location where services are provided to the student.	N/A	N/A
School Name	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.
School Phone	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.
Grade	The student's current grade.	Enrollment > Grade enrollment.grade	This field is pulled from the Enrollment record.
District Information *These fields are read only.*			
District Number	The district number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > State District Number
District Name	The district name associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Name
District Address	The district address associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Address
District Phone	The district phone number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Phone

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 Editor

Click here to expand...

Field	Description	Ad Hoc
Last Name	The student's last name.	Census > People > Demographics > Last Name identity.lastName
First Name	The student's first name.	Census > People > Demographics > First Name identity.firstName
Middle Name	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
Suffix	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
Age	The age of the student.	Census > People > Demographics > Age
Birthdate	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate

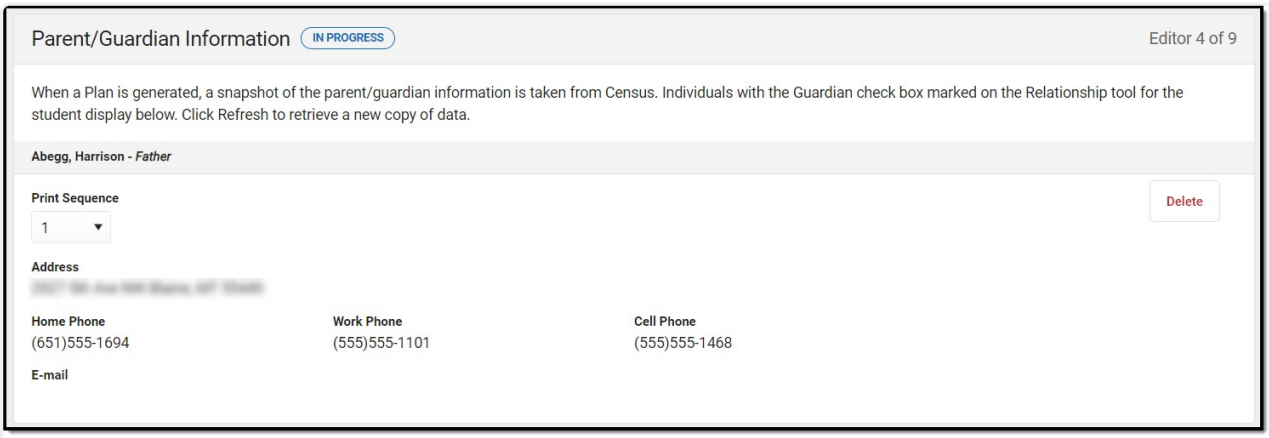
Field	Description	Ad Hoc
Gender	The student's gender.	Census > People > Demographics > Gender identity.gender
Federal Designation	The student's federal race designation.	Census > People > Demographics > Federal Designation identity.raceEthnicityDetermination
Federal Race(s)	The student's federal race(s).	Census > People > Demographics > Race(s) identity.raceEthnicityFed
Race, Ethnicity (state)	The student's state race/ethnicity designation.	Census > People > Demographics > Race/Ethnicity Determination identity.raceEthnicity
Address	The student's address. This field becomes a dropdown if 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
Student Number	The student's identification number.	Census > People > Demographics > Student Number
State ID	The student's state identification number.	Census > People > Demographics > State ID
Case Manager Information		
Name	The first and last name of the team member.	Student Information > Special Ed > General > Team Members
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

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 Editor

Click here to expand...

Field	Description	Ad Hoc	Validation
Last Name	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.
First Name	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.
Middle Name	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.
Suffix	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.

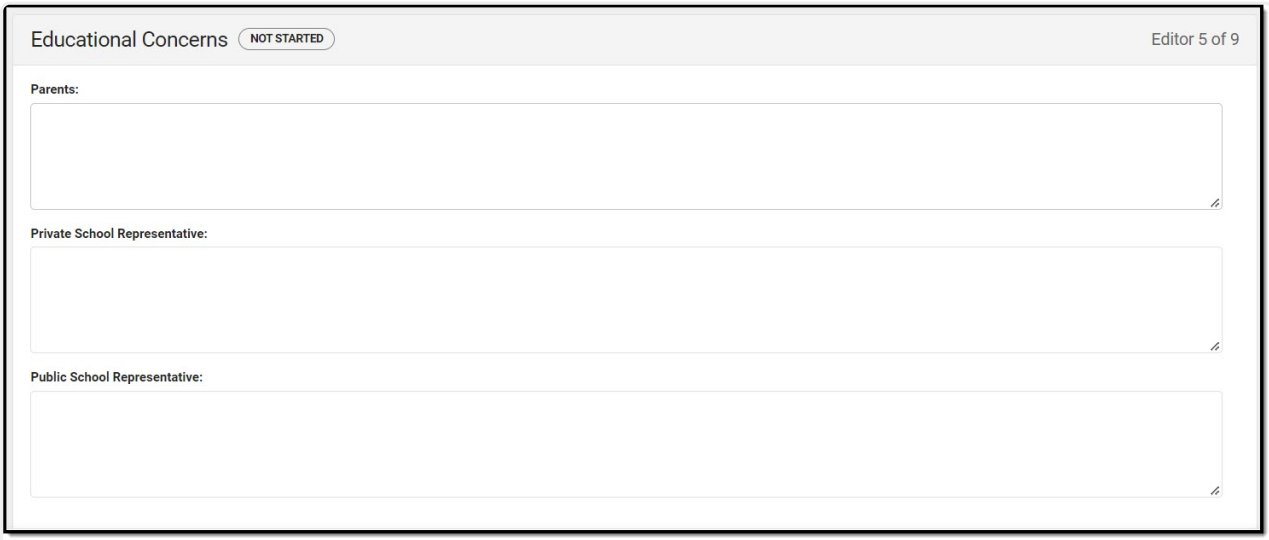
Field	Description	Ad Hoc	Validation
Relationship	The relation of the parent/guardian to the student.	Census > People > Relationships	This field populates from Census. This is part of the header for the parent/guardian.
Sequence	The print order of the parent/guardian(s) on the IEP.	N/A	When no Sequence 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.
Address	The parent/guardians' address.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.apt; 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 dropdown. When there is only one address, the drop down only has one option. The populated address is the one marked "Primary."
Home Phone	The home phone number of the parent/guardian.	Census > People > Demographics > Household Phone	This field populates from Census.
Work Phone	The work phone of the parent/guardian.	Census > People > Demographics > Work Phone	This field populates from Census.
Cell Phone	The cell phone of the parent/guardian.	Census > People > Demographics > Cell Phone	This field populates from Census.

Field	Description	Ad Hoc	Validation
Email	The primary email address for the parent/guardian.	Census > People > Demographics > Email	This field populates from Census.

Educational Concerns

The Educational Concerns editor is used to document any information regarding the student's educational concerns.

This editor is required.



Educational Concerns Editor

Click here to expand...

Field	Description
Parents	A descriptions of the parent/guardian's concerns.
Private School Representative	A description of the private school representative's concerns.
Public School Representative	A description of the public school representative's concerns.

Services Provided

The Services Provided editor is used to document the services to be provided to the student.

Click here to expand...

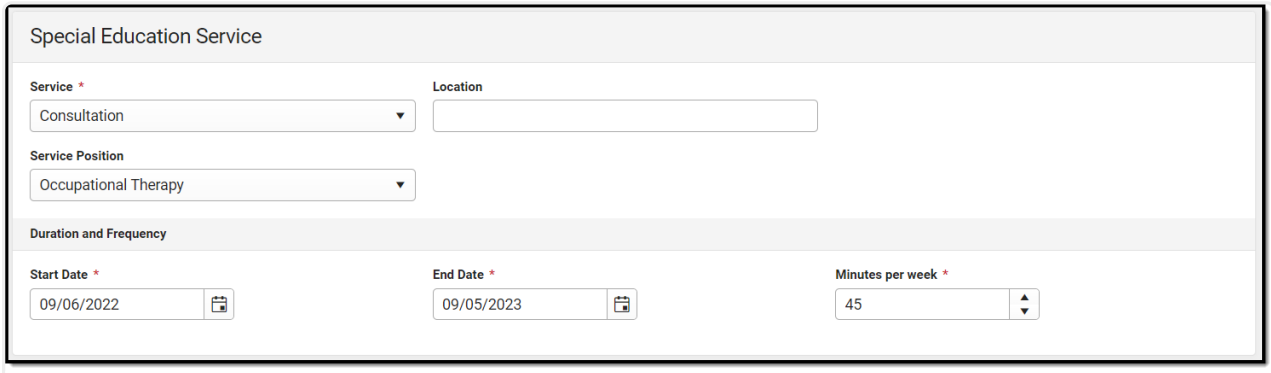
Services Provided List Screen



Services Provided List Screen

Field	Description
Padlock Icon	The user currently editing the record.
Service Provided	The name of the service.
Time	The minutes per week of service.
Start Date	The first day of service.
End Date	The last day of service.

Services Provided Detail Screen



Services Provided Detail Screen

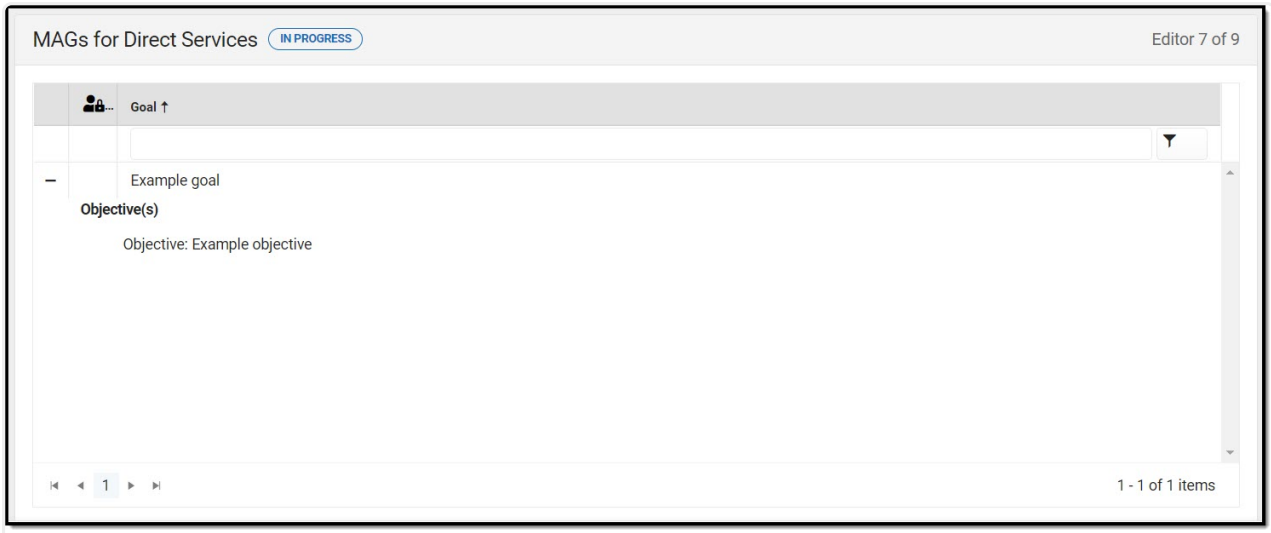
Field	Description	Validation
Service *Required*	The name of the special education service provided.	Service options available in this dropdown are based on the hard-coded list created in the Special Ed Services tool.
Service Position	The type of staffing position providing the service.	Service Position options available in this dropdown are based on the hard-coded list created in the Special Ed Service Positions tool.
Location	The location of the service.	N/A
Start Date *Required*	The first day of service.	This field auto populates to the Plan Start Date and cannot be before the Plan Start Date.
End Date *Required*	The last day of service.	This field auto populates to the Plan End Date and cannot be after the Plan End Date.
Minutes per week *Required*	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).

MAGs for Direct Services

The MAGs for Direct Services editor is used to document the student's goals and objectives for the plan.

Click here to expand...

MAGs for Direct Services List Screen



MAGs for Direct Services List Screen

Field	Description
Padlock Icon	The user currently editing the record.
Goal	The name of the goal.

MAGs for Direct Services Detail Screen



MAGs for Direct Services Detail Screen

Field	Description	Validation

Field	Description	Validation
Goal *Required*	The name of the goal.	Template banks are set up using the Special Ed Template Banks tool. **Ad hoc Inquiries**: learningPlan.goal
Objectives		
Objectives	The name of the objective.	**Ad hoc Inquiries**: learningPlan.objective

Participation in Meetings

The Participation in Meetings 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...

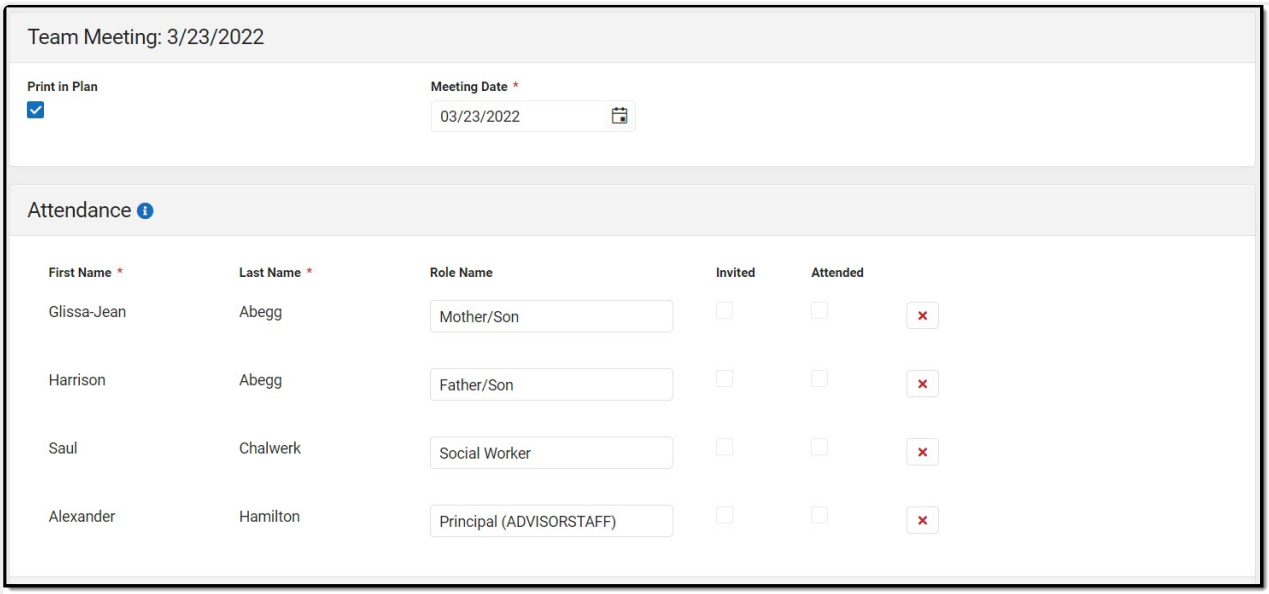
Participation in Meetings List Screen



Participation in Meetings List Screen

Field	Description
Padlock Icon	The user currently editing the record.
Meeting Date	The day of the meeting.
Print in Plan	Indicates this record prints on the plan.

Participation in Meetings Detail Screen



Participation in Meetings Detail Screen

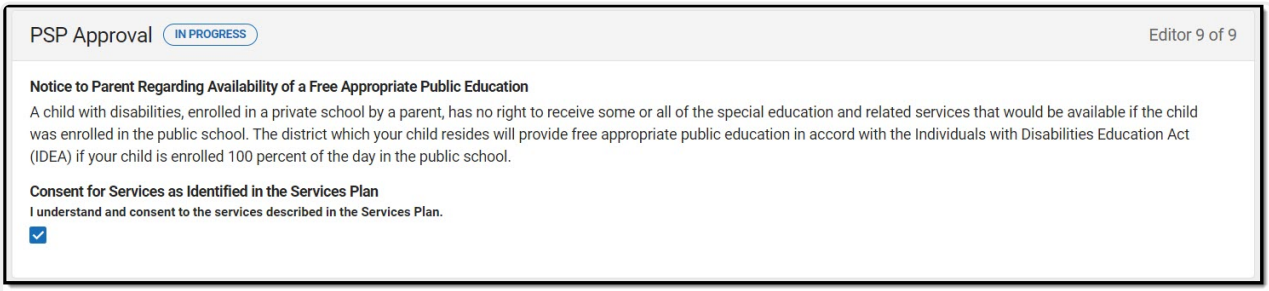
Field	Description	Validation
Print in Plan	Indicates this record prints on the plan.	Defaults to marked.
Meeting Date *Required*	The day of the meeting.	N/A
Attendance		
First Name *Required*	The first name of the team member.	N/A
Last Name *Required*	The last name of the team member.	N/A
Role	The role of the team member.	This field pulls in the Title in from the Team Members tool, but can be modified as needed.
Invited	Indicates the team member was invited to the meeting.	Determines whether or not the team member displays on print.

Field	Description	Validation
Delete	Removes the participant from the meeting.	N/A
Add	Creates a new participant to participate in the meeting who is not listed on the Team Members tool.	N/A
Refresh	Refreshes the team member list and sets any records originally brought in back to their original status.	N/A

PSP Approval

The PSP Approval editor is used to document the parent/guardian's consent for their student to receive services.

This editor is required.



PSP Approval