

# Private School Plan (Montana)

Last Modified on 02/06/2026 10:09 am CST

## 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

NAME	STATUS	MODIFIED BY	COMPLETED BY
Private School Services Plan	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:20 PM	>
Enrollment Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:23 PM	>
Student Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:47 PM	>
Parent/Guardian Information	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:47 PM	>
Educational Concerns	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:49 PM	>
Services Provided	<span>NOT STARTED</span>		>
MAGS for Direct Services	<span>IN PROGRESS</span>	Demo Administrator 3/29/22 12:52 PM	>
Participation in Meetings	<span>IN PROGRESS</span>	Demo Administrator	>

*Editor Home*

## Private School Services Plan

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

Private School Services Plan
IN PROGRESS
Editor 1 of 9

Meeting Date *	Start Date *	End Date *	Last Re-Evaluation
03/14/2022 <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>	03/15/2022 <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>	03/14/2023 <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>	month/day/year <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>
Optional: District Total Proportionate Share Calculation			
<input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>			
Optional: Estimated Cost of Service Plan			
<input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 50%;" type="button" value="▼"/>			

*Private School Services Plan*

▶ [Click here to expand...](#)

Field	Description	Validation
<b>Meeting Date</b> <i>Required</i>	The date of the meeting.	N/A
<b>Start Date</b> <i>Required</i>	The first day of the plan.	This field auto populates to one day after the Meeting Date.
<b>End Date</b> <i>Required</i>	The last day of the plan.	This field auto populates to one year from the Meeting Date.
<b>Last Re-Evaluation:</b>	The date the student was last evaluated.	This field auto populates to the date of the most recent, locked Evaluation.
<b>Optional: District Total Proportionate Share Calculation</b>	The shared time between public and private school(s).	Decimals are allowed in this field.
<b>Optional: Estimated Cost of Service Plan</b>	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** NOT STARTED

Editor 2 of 9

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

**Primary Disability**
**Public School District In Which Student Resides**
**Public School District Providing Services**
**Private School**

**School Name**

Arthur Elementary

**School Phone**

(555)555-7890

**Grade**

KG

**District Information**
**District Number**

100

**District Name**

Plainview Schools

**District Address**

**District Phone**

(763)555-5555

*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	This field is pulled from the most recent locked evaluation.  Up to 10 disabilities can display if entered on the Evaluation. <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>

Field	Description	Ad Hoc	Validation
<b>Public School District in Which Student Resides</b>	The location at which the student resides.	N/A	N/A
<b>Public School District Providing Services</b>	The location where services are provided to the student.	N/A	N/A
<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.
<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.
<b>Grade</b>	The student's current grade.	Enrollment > Grade enrollment.grade	This field is pulled from the Enrollment record.

#### District Information

*These fields are read only.*

<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

## 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

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	First Name	Middle Name	Suffix
Abegg	Colton		
Age	Birthdate	Gender	
6		M	
Federal Designation	Federal Race(s)	Race, Ethnicity (state)	
4: Black or African American	4: Black or African American		
Address		Student Number	State ID
<b>Case Manager Information</b>			
Name	Title		
Phone			

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

Field	Description	Ad Hoc
<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
<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 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
<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

#### Case Manager Information

<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

## 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 9

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 style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px;" type="button" value="Delete"/>	
1	▼	
Address		
<input style="width: 100%; height: 20px; border: 1px solid #ccc; padding: 2px;" type="text"/>		
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.

Field	Description	Ad Hoc	Validation
<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.
<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.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."
<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.

Field	Description	Ad Hoc	Validation
<b>Email</b>	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 NOT STARTED Editor 5 of 9

Parents:

Private School Representative:

Public School Representative:

Educational Concerns Editor

▶ [Click here to expand...](#)

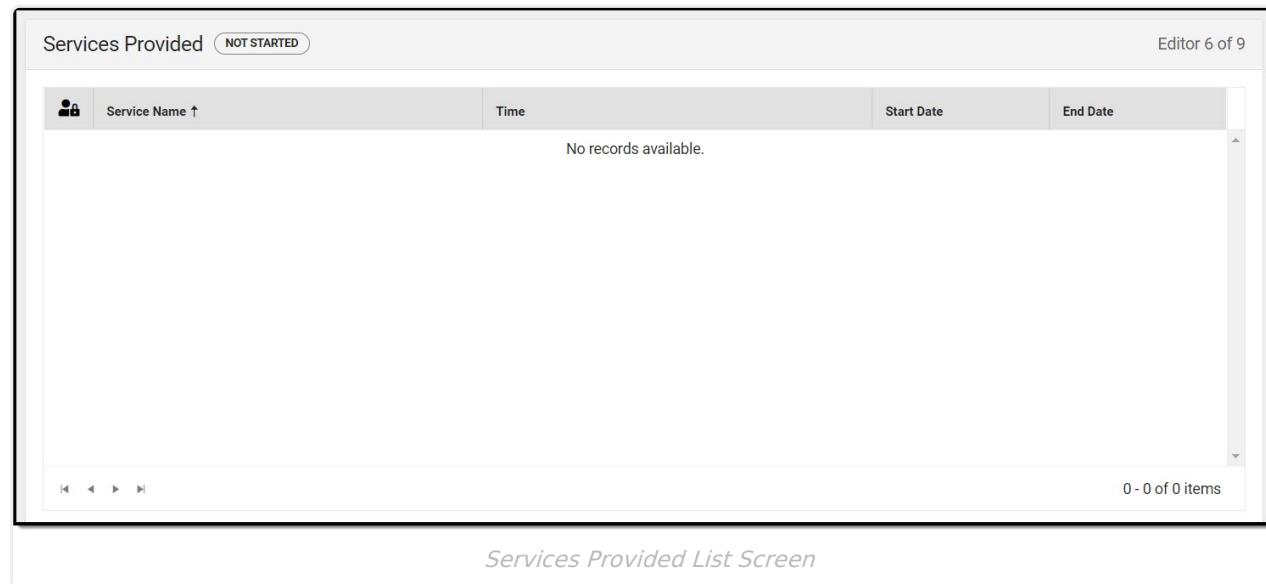
Field	Description
<b>Parents</b>	A descriptions of the parent/guardian's concerns.
<b>Private School Representative</b>	A description of the private school representative's concerns.
<b>Public School Representative</b>	A description of the public school representative's concerns.

## 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 NOT STARTED

Editor 6 of 9

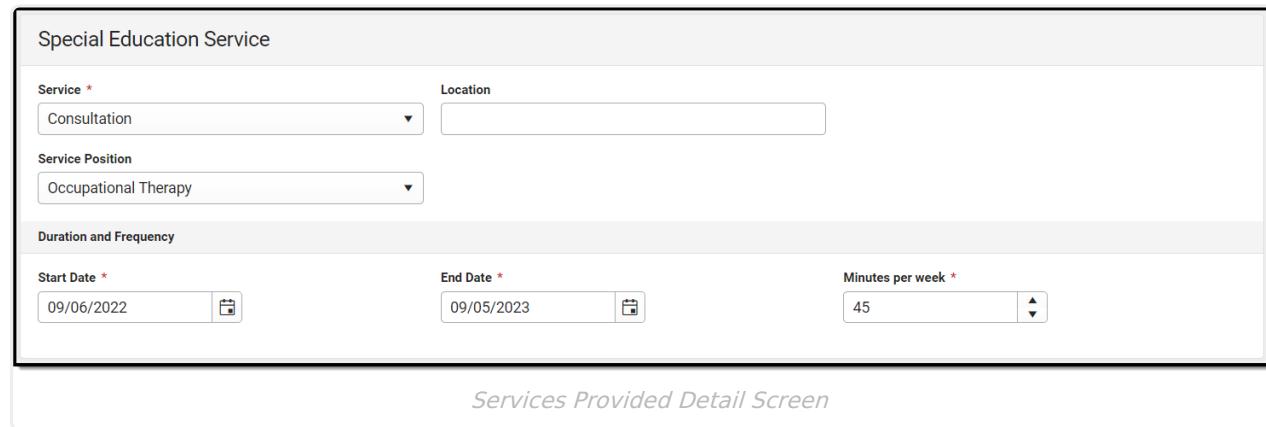
Service Name ↑	Time	Start Date	End Date
No records available.			

0 - 0 of 0 items

Services Provided List Screen

Field	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Service Provided</b>	The name of the service.
<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.

## Services Provided Detail Screen



Special Education Service

Service *	Location	
Consultation		
Service Position		
Occupational Therapy		
Duration and Frequency		
Start Date *	End Date *	Minutes per week *
09/06/2022	09/05/2023	45

Services Provided 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.
<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>Location</b>	The location of the service.	N/A
<b>Start Date Required</b>	The first day of service.	This field auto populates to the Plan Start Date and cannot be before the Plan Start Date.
<b>End Date Required</b>	The last day of service.	This field auto populates to the Plan End Date and cannot be after the Plan End Date.
<b>Minutes per week Required</b>	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



The screenshot shows a list screen for MAGs for Direct Services. At the top, it says "MAGs for Direct Services" and "IN PROGRESS". On the right, it says "Editor 7 of 9". The main area shows a single item with a padlock icon and the name "Goal ↑". Below it, it says "Example goal" and "Objective(s)". Under "Objective(s)", it says "Objective: Example objective". At the bottom, there are navigation arrows and the text "1 - 1 of 1 items".

*MAGs for Direct Services List Screen*

Field	Description
<b>Padlock Icon</b>	The user currently editing the record.
<b>Goal</b>	The name of the goal.

## MAGs for Direct Services Detail Screen



The screenshot shows the MAGs for Direct Services Detail Screen. It has two main sections: "Goal" and "Objectives". The "Goal" section contains a field labeled "Goal" with a value of "Example goal". The "Objectives" section contains a field labeled "Objective" with a value of "Example objective". There is also an "Add" button at the bottom of the objectives section.

*MAGs for Direct Services Detail Screen*

Field	Description	Validation
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Field	Description	Validation
<b>Goal</b> <i>Required</i>	The name of the goal.	Template banks are set up using the <a href="#">Special Ed Template Banks</a> tool.  <b>Ad hoc Inquiries:</b> learningPlan.goal
<b>Objectives</b>		
<b>Objectives</b>	The name of the objective.	<b>Ad hoc Inquiries:</b> learningPlan.objective

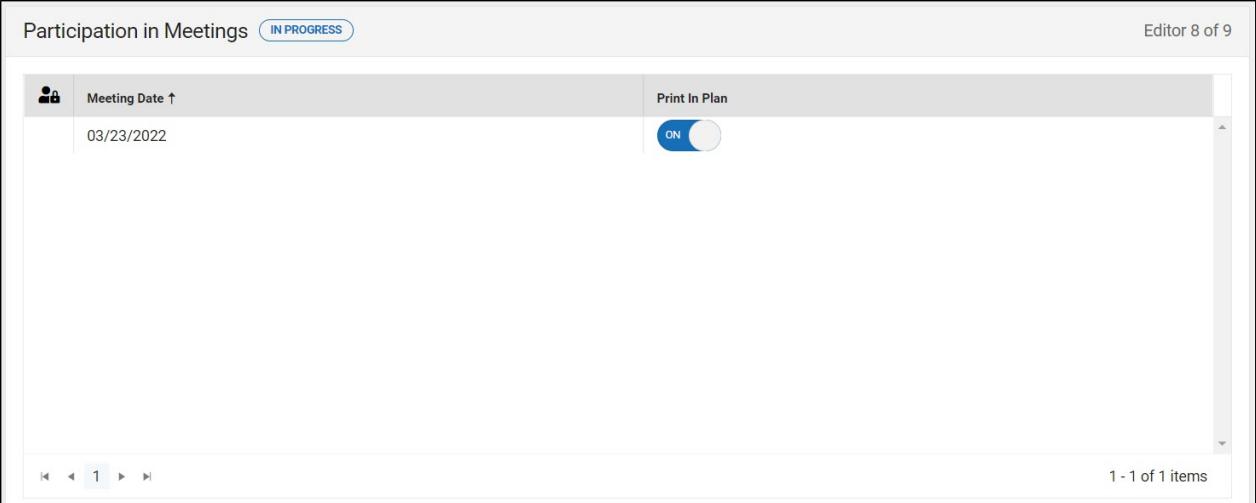
## Participation in Meetings

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 IN PROGRESS Editor 8 of 9

Meeting Date ↑	Print In Plan
03/23/2022	<input checked="" type="checkbox"/> ON

1 - 1 of 1 items

Participation in Meetings List Screen

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

## Participation in Meetings Detail Screen

Team Meeting: 3/23/2022

Print in Plan <input checked="" type="checkbox"/>	Meeting Date * <input type="text" value="03/23/2022"/> <span style="font-size: 2em;">[x]</span>
------------------------------------------------------	----------------------------------------------------------------------------------------------------

Attendance i

First Name *	Last Name *	Role Name	Invited	Attended
Glissa-Jean	Abegg	Mother/Son	<input type="checkbox"/>	<input type="checkbox"/> <span style="color: #C00000;">x</span>
Harrison	Abegg	Father/Son	<input type="checkbox"/>	<input type="checkbox"/> <span style="color: #C00000;">x</span>
Saul	Chalwerk	Social Worker	<input type="checkbox"/>	<input type="checkbox"/> <span style="color: #C00000;">x</span>
Alexander	Hamilton	Principal (ADVISORSTAFF)	<input type="checkbox"/>	<input type="checkbox"/> <span style="color: #C00000;">x</span>

Participation in Meetings Detail Screen

Field	Description	Validation
<b>Print in Plan</b>	Indicates this record prints on the plan.	Defaults to marked.
<b>Meeting Date</b> <i>Required</i>	The day of the meeting.	N/A
<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.

Field	Description	Validation
<b>Delete</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

## 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 IN PROGRESS

Editor 9 of 9

**Notice to Parent Regarding Availability of a Free Appropriate Public Education**

A child with disabilities, enrolled in a private school by a parent, has no right to receive some or all of the special education and related services that would be available if the child was enrolled in the public school. The district which your child resides will provide free appropriate public education in accord with the Individuals with Disabilities Education Act (IDEA) if your child is enrolled 100 percent of the day in the public school.

**Consent for Services as Identified in the Services Plan**

I understand and consent to the services described in the Services Plan.

*PSP Approval*

## Previous Versions

[Private School Plan \(Montana\) \[.2243 and previous\]](#)