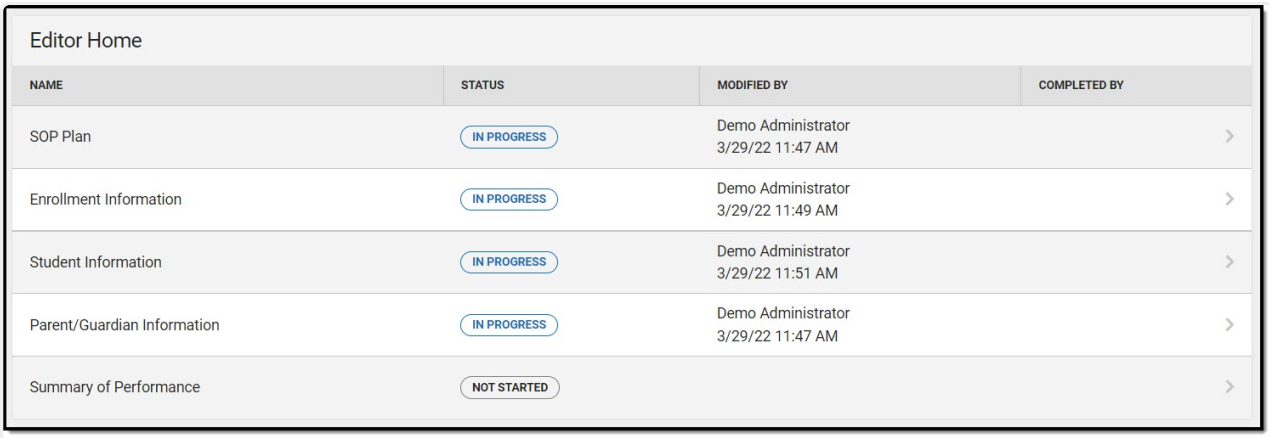
Summary of Performance Plan (Montana)

Last Modified on 06/29/2026 10:59 am CDT

Tool Search: Special Ed Documents

The Summary of Performance 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.

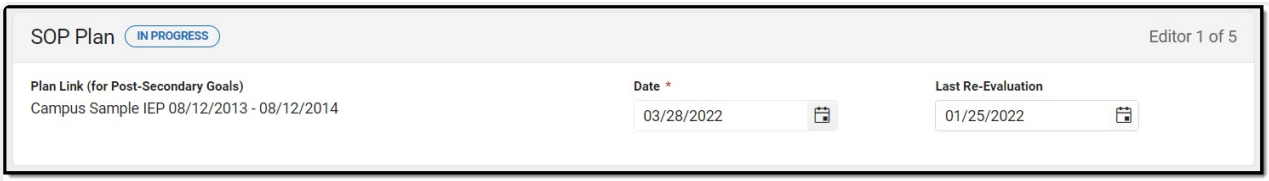
The current print format of this document is the **MT SOP 2022.2**. Plan formats are selected in the Special Ed Plan Types tool.



Editor Home

SOP Plan

The Summary of Performance Plan editor lists basic information regarding the plan.



SOP Plan Editor

Click here to expand...

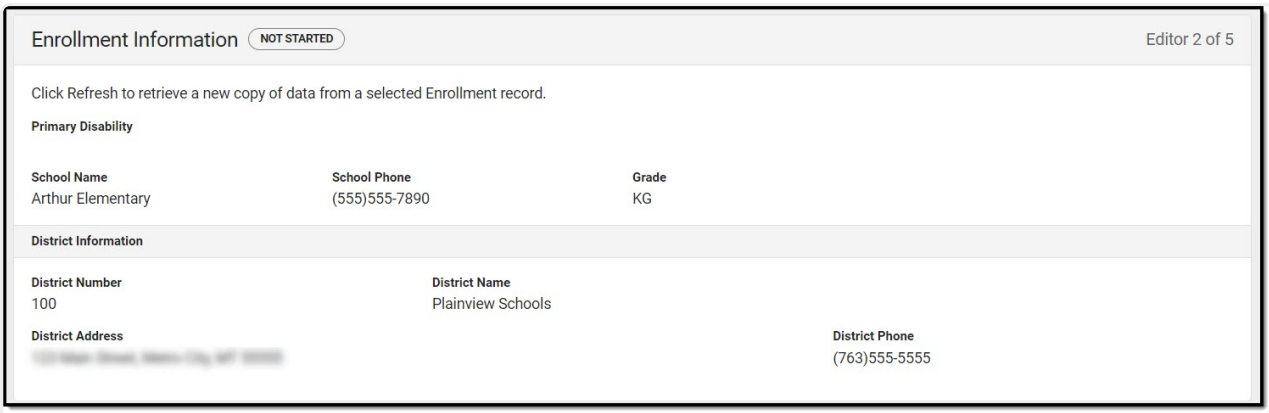
Field	Description	Validation
Plan Link (for Post-Secondary Goals)	A list of plans.	This field pre-populates with most recent, locked Plan. Once saved, this field becomes read only. Only IEP Play Types display.
Date *Required*	The date of the plan.	N/A
Last Re-Evaluation Date	The last re-evaluation date.	Pre-populates with most recent Evaluation Date, regardless of a locked status or not.

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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

Click here to expand...

Field	Description	Ad Hoc	Validation

Field	Description	Ad Hoc	Validation
School of Attendance	The name of the school associated with the student's Enrollment record.	N/A	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			
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

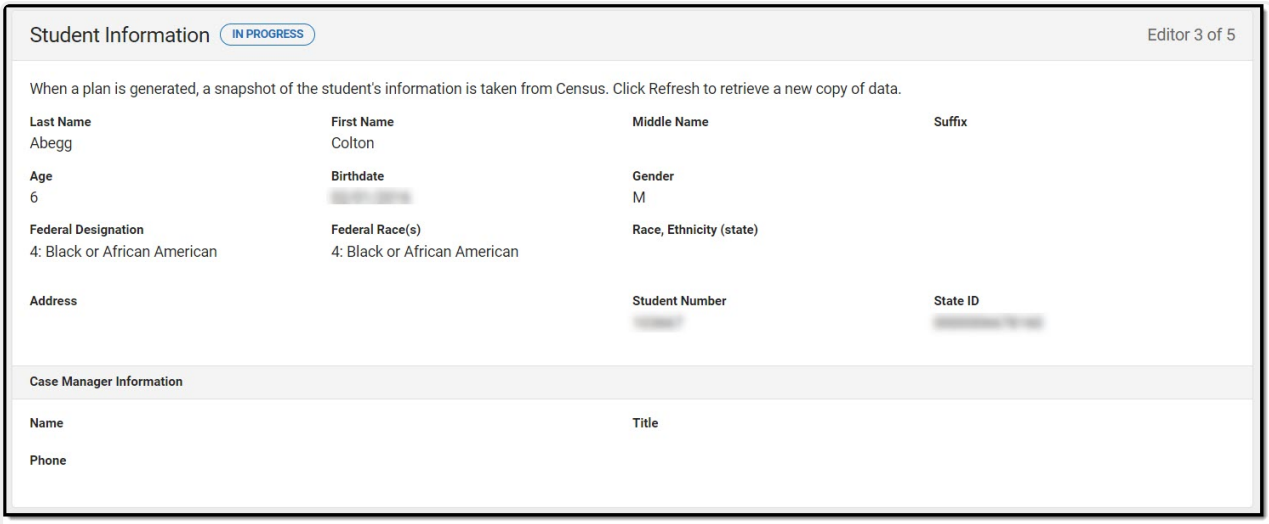
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Student Information

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 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
Gender	The student's gender.	Census > People > Demographics > Gender identity.gender

Field	Description	Ad Hoc
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 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
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

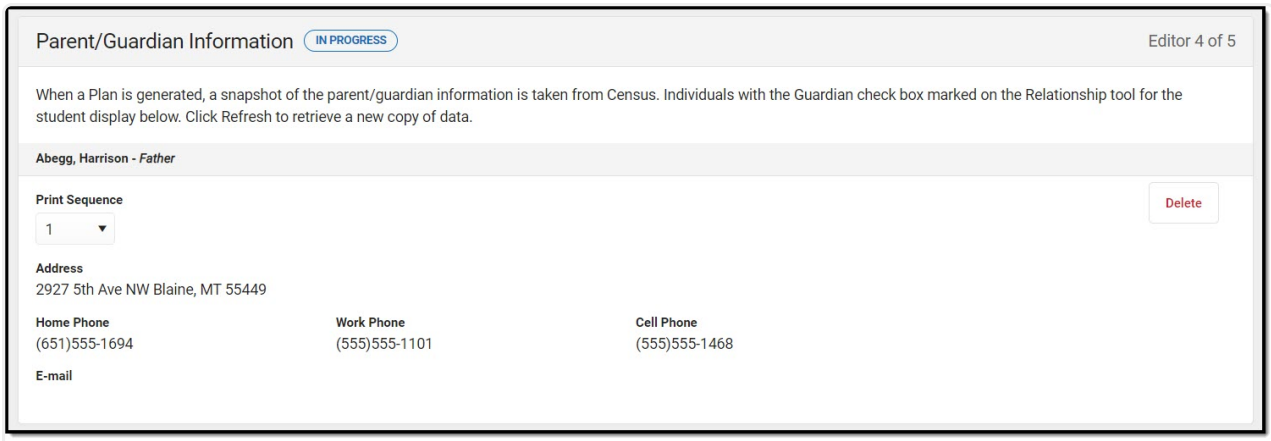
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Parent/Guardian Information

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 SOP.

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.
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.

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

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Summary of Performance

The Summary of Performance editor is used to document a summary of the student academic achievement and functional performance and the team's recommendations for meeting the student's postsecondary goals.



Summary of Performance

Click here to expand...

Field	Description	Validation
Training or Education:	A description of the student's postsecondary goals for training and/or education.	This is a read-only field and populates from the IEP > Postsecondary Goals > Training or Education Field. The data refreshes each time the editor is opened.
Employment:	A description of the student's postsecondary goals for employment	This is a read-only field and populates from the IEP > Postsecondary Goals > Employment Field. The data refreshes each time the editor is opened.
Where appropriate, Independent Living Skills	A description of the student's postsecondary goals for independent living skills.	This is a read-only field and populates from the IEP > Postsecondary Goals > Independent Living Skills Field. The data refreshes each time the editor is opened.

Field	Description	Validation
Summary of Student's Academic Achievement and Functional Performance:	A description of the student's academic performance and functional performance.	N/A
Recommendations for Meeting Postsecondary Goals:	The team's recommendations for meeting the student's postsecondary goals.	N/A

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