

Summary of Performance Plan (Montana)

Last Modified on 01/27/2025 12:36 pm CST

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Tool Search: Special Ed Documents

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

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

Editor Home			
NAME	STATUS	MODIFIED BY	COMPLETED BY
SOP Plan	IN PROGRESS	Demo Administrator 3/29/22 11:47 AM	>
Enrollment Information	IN PROGRESS	Demo Administrator 3/29/22 11:49 AM	>
Student Information	IN PROGRESS	Demo Administrator 3/29/22 11:51 AM	>
Parent/Guardian Information	IN PROGRESS	Demo Administrator 3/29/22 11:47 AM	>
Summary of Performance	NOT STARTED		>

Editor Home

Editor Home

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

Header	Description
Name	The name of the editor.

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

General Information

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


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

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

Editor Types

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

Editor Lock Out and Release Logic

Only one user at a time can actively work on an editor. A person with a padlock icon () displays in the Editors side panel, Editor Home, and List Screen of list editors indicating which

editors currently have users working on them. Hovering over the icon displays the name of the user who has checked out the editor, including the current user (you).

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

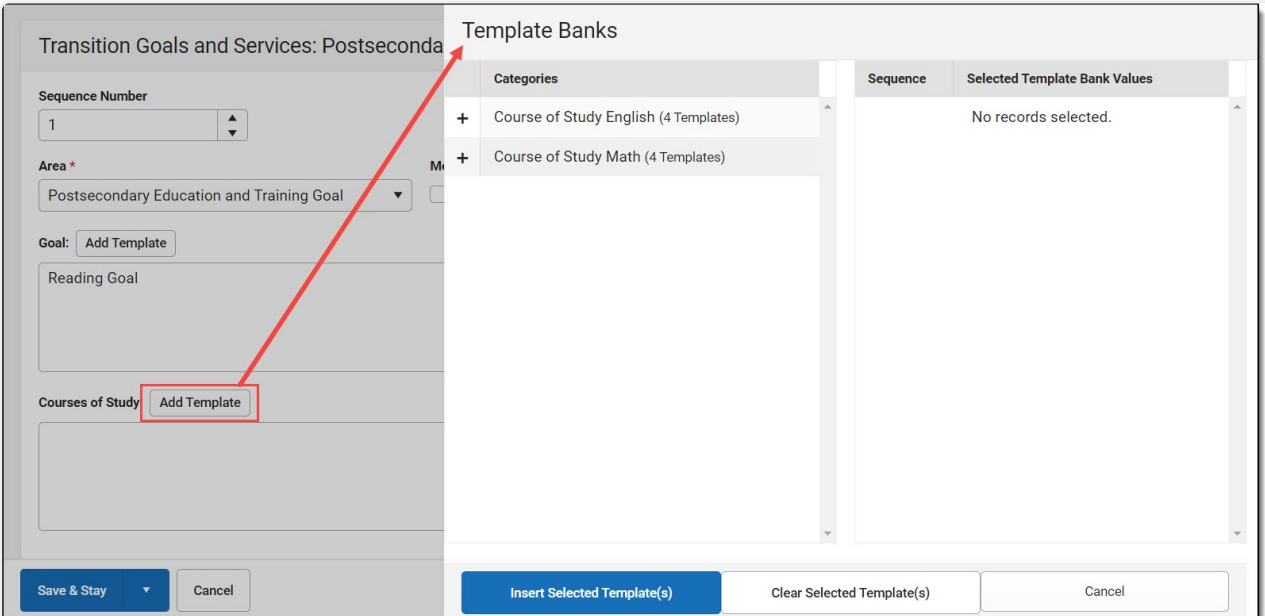
To release an editor, the user must:

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

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

Template Banks

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



Template Bank Side Panel

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

Template Banks

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

Expanded Category and Values Selected

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

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

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

Courses of Study:

Grade 9: English 100

Grade 10: English 200

Grade 11: English 300

Grade 12: English 400

Example Template Bank Selections in the Document

Text Editors

Images should not be inserted into text fields.

Editors

[SOP Plan](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [Summary of Performance](#)

The following section lists each editor and describes each field on the editor.

SOP Plan

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

SOP Plan IN PROGRESS
Editor 1 of 5

Plan Link (for Post-Secondary Goals)
Campus Sample IEP 08/12/2013 - 08/12/2014

Date *

Last Re-Evaluation

SOP Plan Editor

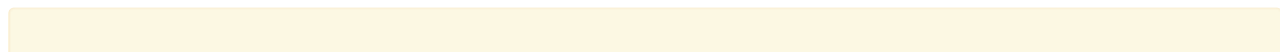
▶ [Click here to expand...](#)

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 <i>Required</i>	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 Editor 2 of 5

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

Primary Disability

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

District Information

District Number	District Name	District Phone
100	Plainview Schools	(763)555-5555

Enrollment Information

▶ [Click here to expand...](#)

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

Field	Description	Ad Hoc	Validation
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 3 of 5

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

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

Case Manager Information

Name	Title
Phone	

Student Information Editor

[▶ Click here to expand...](#)

Field	Description	Ad Hoc
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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
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

Field	Description	Ad Hoc
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 IN PROGRESS
Editor 4 of 5

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

1 ▼

Address
2927 5th Ave NW Blaine, MT 55449

Home Phone
(651)555-1694

E-mail

Work Phone
(555)555-1101

Cell Phone
(555)555-1468

Delete

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.
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.

Field	Description	Ad Hoc	Validation
Address	The parent/guardians' address.	Census > Households > Address Info address.number; address.street; address.tag; address.prefix; address.dir; address.appt; 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 Editor 5 of 5

Measurable Postsecondary Goals from most recent IEP:

Training or Education:

Employment:

Where appropriate, Independent Living Skills:

Summary of Student's Academic Achievement and Functional Performance:

Recommendations for Meeting 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.
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

Previous Versions

[Summary of Performance Plan \(Montana\) \[.2243 and previous\]](#)
