

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

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Classic View: Student Information > Special Ed > General > Documents

Search Terms: Special Ed Documents

The Private School 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 PSP 2022**. Plan formats are selected in the [Special Ed Plan Types](#) tool.

Editor Home

The Editor Home lists the editors available on the student's Private School Plan.

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

Editor Home

Header	Description
Name	The name of the editor.
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 to be 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.
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 PSP Information

The following table lists the buttons available for the editors:

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 usually found within the detail screen of 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 Types section for additional information.
Refresh	<p>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 people records. Manually entered fields do not change when the refresh button is clicked. The user must Save after clicking Refresh to capture changes.</p> <p>A side panel displays listing all applicable Enrollment records for the student. See the Enrollments tool documentation for additional information.</p>

Button	Description
Cancel	Navigates the user to the Editor Home screen or to the List Screen for List editors.
Status <i>i.e.</i> <i>Complete,</i> <i>Not</i> <i>Needed,</i> <i>etc.</i>	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. To further edit after an editor is marked Complete, the user must click In Progress. • Not Needed indicates the editor does not apply to the student's plan. This makes the editor read only. However, this does not lock the editor from further editing. To further edit after an editor is marked Not Needed, click the In Progress button. • In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.
Print	Prints the entire plan.
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 display. 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. An example list editor is the [Services Provided](#) editor.

Padlock Icon

Only one user at a time can actively work on an editor. A person with a padlock icon  displays in the Editors side pane, 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. Once the editing user navigates away from an editor, that editor becomes available to work on.

Template Banks

Certain fields within several editors have a paper icon  displays next to their name. When the icon is clicked, a side panel displays with the available library of predetermined text for that field. [Template Banks](#) are managed in System Administration.

Editors

[Private School Services Plan](#) | [Enrollment Information](#) | [Student Information](#) | [Parent/Guardian Information](#) | [Educational Concerns](#) | [Services Provided](#) | [MAGs for Direct Services](#) | [Participation in Meetings](#) | [PSP Approval](#)

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

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 type="button" value="Calendar"/>	03/15/2022 <input type="button" value="Calendar"/>	03/14/2023 <input type="button" value="Calendar"/>	month/day/year <input type="button" value="Calendar"/>
Optional: District Total Proportionate Share Calculation <input style="width: 20px; height: 15px; border: 1px solid #ccc; border-radius: 5px;" type="button" value="▼"/>			
Optional: Estimated Cost of Service Plan <input style="width: 20px; height: 15px; border: 1px solid #ccc; border-radius: 5px;" type="button" value="▼"/>			

Private School Services Plan

► [Click here to expand...](#)

Field	Description	Validation
Meeting Date <i>Required</i>	The date of the meeting.	N/A
Start Date <i>Required</i>	The first day of the plan.	This field auto populates to one day after the Meeting Date.
End Date <i>Required</i>	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.

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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 PSP 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

Private School

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

Public School District Providing Services

District Information

District Number: 100 District Name: Plainview Schools

District Address: 1234 Main Street, Plainview, NY 10000 District Phone: (763)555-5555

Enrollment Information Editor

► [Click here to expand...](#)

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

Field	Description	Ad Hoc	Validation
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 PSP Information](#) section for additional information.

Student Information IN PROGRESS

Editor 3 of 9

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
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Age 6	Birthdate	Gender M
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Federal Designation 4: Black or African American	Federal Race(s) 4: Black or African American	Race, Ethnicity (state)
---	---	-------------------------

Address	Student Number	State ID
---------	----------------	----------

Case Manager Information

Name	Title
Phone	

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
Birth City	???	
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

Field	Description	Ad Hoc
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

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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 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

1

Delete
Address

1234 Main Street, Anytown, USA 12345

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
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 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.
Email	The primary email address for the parent/guardian.	Census > People > Demographics > Email	This field populates from Census.

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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
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.

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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
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

Special Education Service

Service *	Location
<input style="border: 1px solid red;" type="text"/>	<input type="text"/>

! Service is required

Service Position

Service Provider

Duration and Frequency

Start Date *

03/15/2022 

End Date *

03/14/2023 

Minutes per week *

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.

Field	Description	Validation
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.
Service Provider	The name of the service provider.	Service Provider options available in this dropdown are based on the hard-coded list created in the Special Ed Service Providers 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).

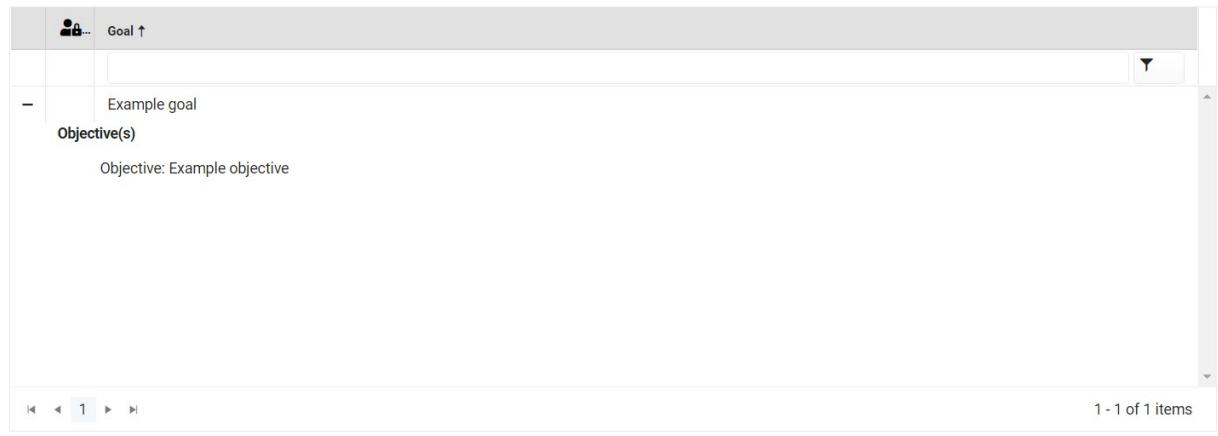
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MAGs for Direct Services

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, under "Objective(s)", is the text "Objective: Example objective". At the bottom, there are navigation buttons (back, forward, search) and a message "1 - 1 of 1 items".

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



The screenshot shows the detail screen for a MAG. It has a "Goal" section with a padlock icon and the name "Example goal". Below it is an "Objectives" section with a sub-section for "Objective: Example objective". This section contains a text input field with "Example objective" and a delete button. At the bottom, there is an "Add" button.

MAGs for Direct Services Detail Screen

Field	Description	Validation
Goal <i>Required</i>	The name of the goal.	Template banks are set up using the Special Ed Template Banks tool.

Field	Description	Validation
Objectives		
Objectives	The name of the objective.	N/A

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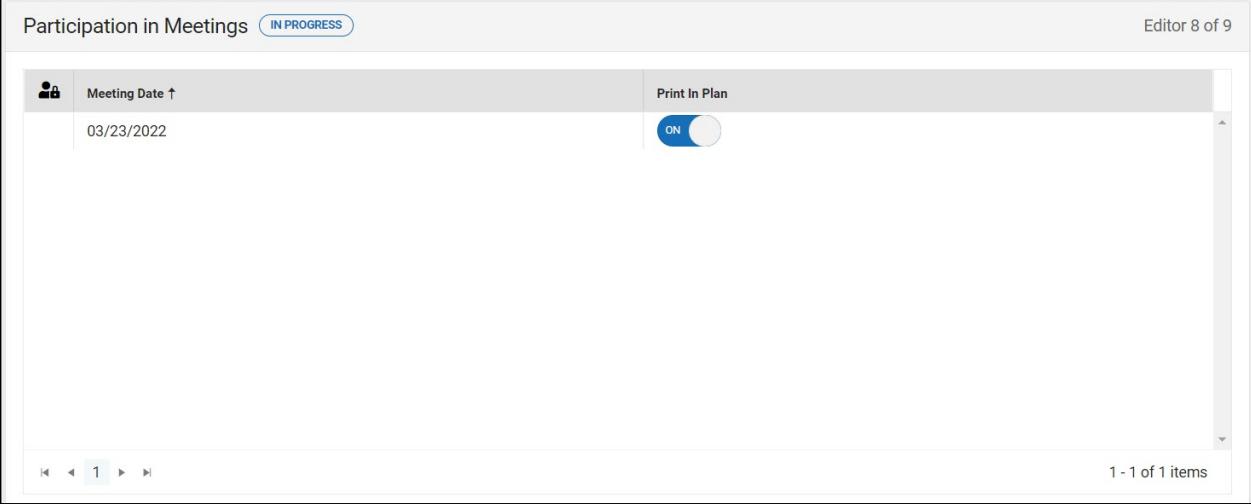
Participation in Meetings

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

1 - 1 of 1 items

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

Team Meeting: 3/23/2022

Print in Plan <input checked="" type="checkbox"/>	Meeting Date * <input type="text" value="03/23/2022"/> 
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Attendance 

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

Participation in Meetings Detail Screen

Field	Description	Validation
Print in Plan	Indicates this record prints on the plan.	Defaults to marked.
Meeting Date <i>Required</i>	The day of the meeting.	N/A
Attendance		
First Name <i>Required</i>	The first name of the team member.	N/A
Last Name <i>Required</i>	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.
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

Field	Description	Validation
Refresh	Refreshes the team member list and sets any records originally brought in back to their original status.	N/A

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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

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