

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

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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**. Plan formats are selected in the [Special Ed Plan Types](#) tool.

Editor Home

The Editor Home lists the editors available on the student's Summary of Performance Plan.

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

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 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 SOP 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>
Cancel	Navigates the user to the Editor Home screen or to the List Screen for List editors.

Button	Description
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.

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 for 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

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

<p>Plan Link (for Post-Secondary Goals) Campus Sample IEP 08/12/2013 - 08/12/2014</p>	<p>Date * 03/28/2022 </p>	<p>Last Re-Evaluation 01/25/2022 </p>
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SOP Plan Editor

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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 SOP Information section for additional information.

Enrollment Information NOT STARTED
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

District Address
10000 Main Street, Minneapolis, MN 55412

Enrollment Information

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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 SOP Information section for additional information.

Student Information IN PROGRESS
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

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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	Work Phone (555)555-1101	Cell Phone (555)555-1468
E-mail		

Delete

Parent/Guardian Information Editor

▶ [Click here to expand...](#)

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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 NOT STARTED
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

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