

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

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You are viewing a previous version of this article. See <u>Summary of Performance Plan</u> (Montana) for the most current information.

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

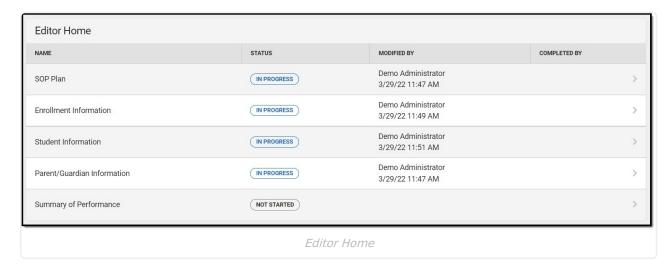
Search Terms: Special Ed Documents

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**. Plan formats are selected in the <u>Special Ed Plan Types</u> tool.

# **Editor Home**

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



Header	Description
Name	The name of the editor.



Header	Description
Status	<ul> <li>In Progress indicates a user has entered and saved data in that editor.</li> <li>Not Started is the default status for all editors.</li> <li>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.</li> <li>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.</li> </ul>
Modified By	The date and the user by whom the editor was last edited.
Completed By	The date and the user who clicked the <b>Complete</b> button for that editor.

# **General SOP Information**

The following table lists the buttons available for the editors:

Button	Description
Save	<ul> <li>Different editors have different save options. Click the arrow next to the Save &amp; Stay button to view all saving options for any given editor.</li> <li>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.</li> <li>Save &amp; 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.</li> <li>Save &amp; Next captures progress and navigates the user to the next editor.</li> <li>Save &amp; 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.</li> </ul>
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 people records. Manually entered fields do not change when the refresh button is clicked. The user must <b>Save</b> after clicking Refresh to capture changes.  A side panel displays listing all applicable Enrollment records for the student. See the Enrollments tool documentation for additional information.
Cancel	Navigates the user to the Editor Home screen or to the List Screen for List editors.



Button	Description
Status i.e. Complete, Not Needed, etc.	<ul> <li>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.</li> <li>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.</li> <li>In Progress only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.</li> </ul>
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 <b>Close</b> 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 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**



<u>SOP Plan</u> | <u>Enrollment Information</u> | <u>Student Information</u> | <u>Parent/Guardian Information</u> | <u>Summary of Performance</u>

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.



#### ▶ 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.
<b>Date</b> <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 SOP Information section for additional information.



Enrollment Information	Enrollment Information NOT STARTED			
Click Refresh to retrieve a new co	ppy of data from a selected Enrollment recor	d.		
School Name Arthur Elementary	School Phone (555)555-7890	<b>Grade</b> KG		
District Information				
District Number 100	District Name Plainview Schoo	bls		
District Address	-		<b>District Phone</b> (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
District Address	The district address associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Address

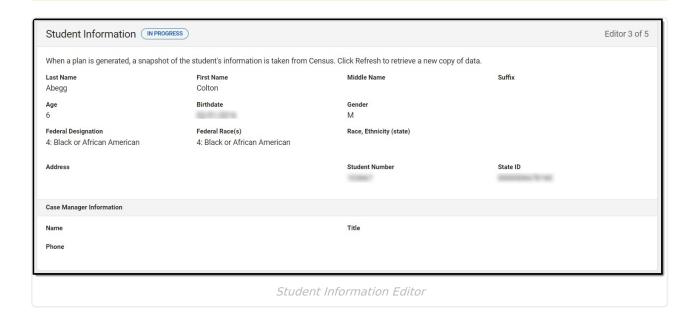


Field	Description	Ad Hoc	Validation
District Phone	The district phone number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Phone

# **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 SOP Information section for additional information.



#### ▶ 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



Field	Description	Ad Hoc	
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	
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	



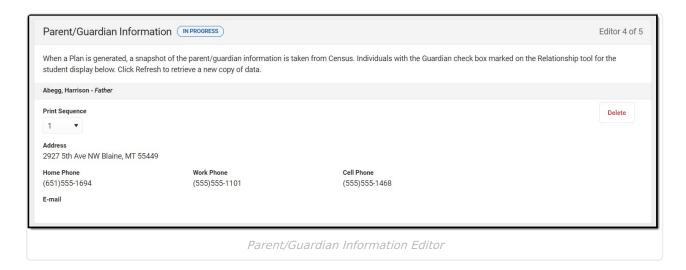
Field	Description	Ad Hoc
Title	The role of the team member.	Student Information > Special Ed > General > Team Members
Phone	The phone number of the team member.	Student Information > Special Ed > General > Team Members

### **Parent/Guardian Information**

The Parent/Guardian Information editor populates based on the guardian checkbox on the student's <u>Relationships</u> tool. The editor includes <u>Demographics</u> 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.



#### 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.



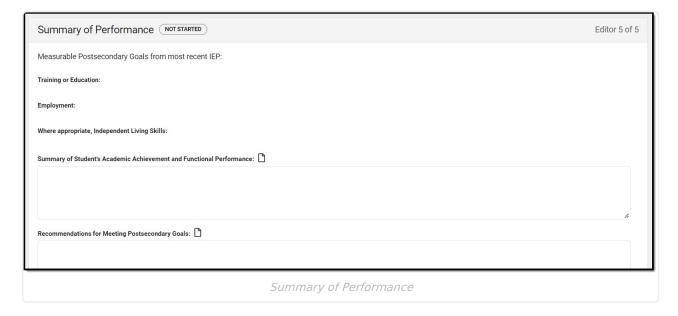
Field	Description	Ad Hoc	Validation
First Name	The first name of the parent/guardian.	Census > People > Demographics > First Name identity.firstName	This field populates from Census. This is part of the header for the parent/guardian.
Middle Name	The suffix of the parent/guardian.	Census > People > Demographics > 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.
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."



Field	Description	Ad Hoc	Validation
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.

# **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.



▶ Click here to expand...

Field	Description	Validation
Field	Description	Validation



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