

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

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

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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
<b>Name</b>	The name of the editor.

Header	Description
<b>Status</b>	<p>The state of the editor. Statuses can be:</p> <ul style="list-style-type: none"> <li>• <b>In Progress</b> indicates a user has entered and saved data in that editor.</li> <li>• <b>Not Started</b> is the default status for all editors.</li> <li>• <b>Complete</b> indicates a user has clicked the <b>Complete</b> 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>• <b>Not Needed</b> indicates a user has clicked the <b>Not Needed</b> button on the editor. This is usually done for editors that do not apply to the student.</li> </ul>
<b>Modified By</b>	The date and the user by whom the editor was last edited.
<b>Completed By</b>	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
<b>Save</b>	<p>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.</p> <ul style="list-style-type: none"> <li>• <b>Save</b> captures progress and navigates the user to the Editor Home or to the List Screen for List editors. See the <a href="#">Editor Types</a> section for additional information.</li> <li>• <b>Save &amp; Stay</b> 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>• <b>Save &amp; Next</b> captures progress and navigates the user to the next editor.</li> <li>• <b>Save &amp; New</b> 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 <a href="#">Editor Types</a> section for additional information.</li> </ul>
<b>Refresh</b>	<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 <b>Save</b> after clicking Refresh to capture changes.</p> <p>A side panel displays listing all applicable Enrollment records for the student. See the <a href="#">Enrollments</a> tool documentation for additional information.</p>
<b>Cancel</b>	Navigates the user to the Editor Home screen or to the List Screen for List editors.

Button	Description
<b>Status</b> <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"> <li>• <b>Complete</b> 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 <b>In Progress</b>.</li> <li>• <b>Not Needed</b> 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 <b>In Progress</b> button.</li> <li>• <b>In Progress</b> only displays when the editor is in the Complete or Not Needed status and allows additional edits to be made.</li> </ul>
<b>Print</b>	Prints the entire plan.
<b>Editors</b>	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.
<b>Previous</b>	Navigates the user to the previous editor.
<b>Next</b>	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

[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 \*  
03/28/2022

Last Re-Evaluation  
01/25/2022

SOP Plan Editor

► [Click here to expand...](#)

Field	Description	Validation
<b>Plan Link (for Post-Secondary Goals)</b>	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
<b>Last Re-Evaluation Date</b>	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

NOT STARTED

Editor 2 of 5

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

### Primary Disability

**School Name**  
Arthur Elementary

**School Phone**  
(555)555-7890

**Grade**  
KG

### District Information

**District Number**  
100

**District Name**  
Plainview Schools

**District Address**  
123 Main Street, Suite 100, NY 10000

**District Phone**  
(763)555-5555

Enrollment Information

► [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
<b>School of Attendance</b>	The name of the school associated with the student's Enrollment record.	N/A	This field is pulled from the Enrollment record.
<b>School Phone</b>	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.
<b>Grade</b>	The student's current grade.	Enrollment > Grade enrollment.grade	This field is pulled from the Enrollment record.
<b>District Information</b>			
<b>District Number</b>	The district number associated with the Enrolled school.	N/A	System Administration > Resources > District Information > State District Number
<b>District Name</b>	The district name associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Name
<b>District Address</b>	The district address associated with the Enrolled school.	N/A	System Administration > Resources > District Information > Address

Field	Description	Ad Hoc	Validation
<b>District Phone</b>	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 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*

► [Click here to expand...](#)

Field	Description	Ad Hoc
<b>Last Name</b>	The student's last name.	Census > People > Demographics > Last Name identity.lastName
<b>First Name</b>	The student's first name.	Census > People > Demographics > First Name identity.firstName

Field	Description	Ad Hoc
<b>Middle Name</b>	The student's middle name.	Census > People > Demographics > Middle Name identity.middleName
<b>Suffix</b>	The student's suffix.	Census > People > Demographics > Suffix Name identity.suffix
<b>Age</b>	The age of the student.	Census > People > Demographics > Age
<b>Birthdate</b>	The student's birthdate.	Census > People > Demographics > Birth Date identity.birthDate
<b>Gender</b>	The student's gender.	Census > People > Demographics > Gender identity.gender
<b>Federal Designation</b>	The student's federal race designation.	Census > People > Demographics > Federal Designation identity.raceEthnicityDetermination
<b>Federal Race(s)</b>	The student's federal race(s).	Census > People > Demographics > Race(s) identity.raceEthnicityFed
<b>Race, Ethnicity (state)</b>	The student's state race/ethnicity designation.	Census > People > Demographics > Race/Ethnicity Determination identity.raceEthnicity
<b>Address</b>	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
<b>Student Number</b>	The student's identification number.	Census > People > Demographics > Student Number
<b>State ID</b>	The student's state identification number.	Census > People > Demographics > State ID
<b>Case Manager Information</b>		
<b>Name</b>	The first and last name of the team member.	Student Information > Special Ed > General > Team Members

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

Delete

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

► [Click here to expand...](#)

Field	Description	Ad Hoc	Validation
<b>Last Name</b>	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
<b>First Name</b>	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.
<b>Middle Name</b>	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.
<b>Suffix</b>	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.
<b>Relationship</b>	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.
<b>Sequence</b>	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.
<b>Address</b>	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
<b>Home Phone</b>	The home phone number of the parent/guardian.	Census > People > Demographics > Household Phone	This field populates from Census.
<b>Work Phone</b>	The work phone of the parent/guardian.	Census > People > Demographics > Work Phone	This field populates from Census.
<b>Cell Phone</b>	The cell phone of the parent/guardian.	Census > People > Demographics > Cell Phone	This field populates from Census.
<b>Email</b>	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

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

► [Click here to expand...](#)

Field	Description	Validation
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Field	Description	Validation
<b>Training or Education:</b>	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.
<b>Employment:</b>	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.
<b>Where appropriate, Independent Living Skills</b>	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.
<b>Summary of Student's Academic Achievement and Functional Performance:</b>	A description of the student's academic performance and functional performance.	N/A
<b>Recommendations for Meeting Postsecondary Goals:</b>	The team's recommendations for meeting the student's postsecondary goals.	N/A

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