

Montana Summary of Performance Plan

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

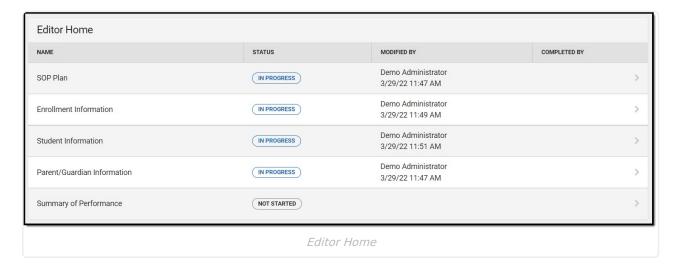
Search Terms: Special Ed Documents

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 Special Ed Plan Types 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	 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	 Different editors have different save options. Click the arrow next to the Save & Stay button to view all saving options for any given editor. 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	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. 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.	 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 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.



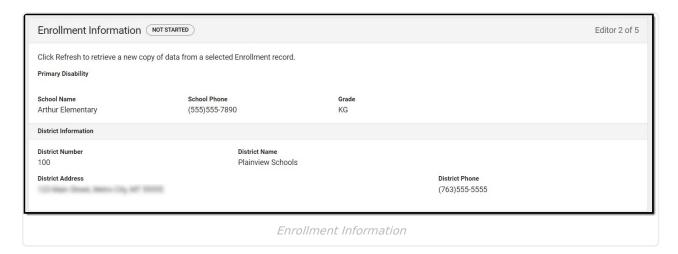
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Enrollment Information

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.



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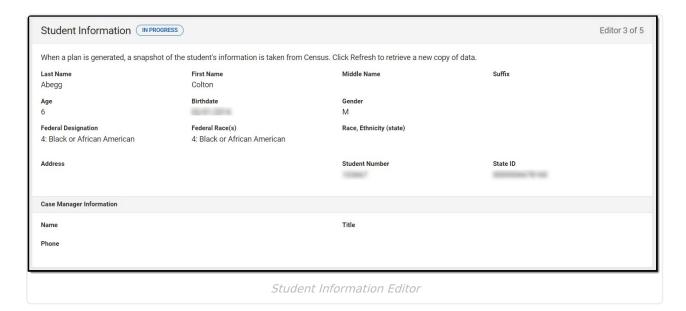
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Student Information

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.



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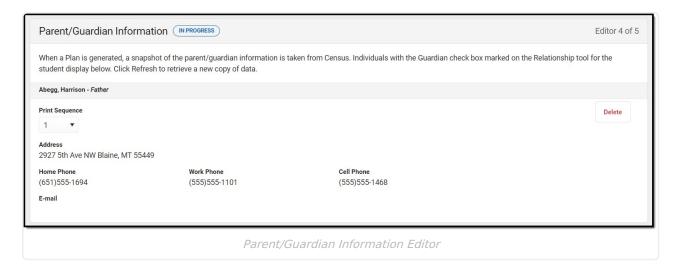
Parent/Guardian Information

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.



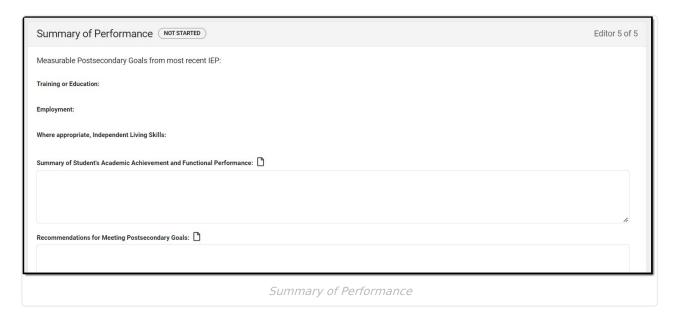


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Summary of Performance

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.



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