Individual Education Plan (Montana)

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

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The Individual Education 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 IEP 2022.2**. Plan formats are selected in the Special Ed Plan Types tool.

Editor Home

The Editor Home lists the editors available on the student's Individual Education Plan.

Editor Home			
NAME	STATUS	MODIFIED BY	COMPLETED BY
Education Plan	IN PROGRESS	Demo Administrator 3/29/22 10:21 AM	
Enrollment Information	IN PROGRESS	Demo Administrator 3/29/22 10:14 AM	
Student Information	IN PROGRESS	Demo Administrator 3/29/22 10:09 AM	
Parent/Guardian Information	IN PROGRESS	Demo Administrator 3/29/22 10:18 AM	
Strengths/Concerns/Interests	NOT STARTED		
Consideration of Special Factors	NOT STARTED		
Transition Services	NOT STARTED		

Editor Home

Header	Description
Name	The name of the editor.

Header	Description
Status	The state of the editor. Statuses can be: • **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 IEP 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.*	Changes the status of the editor. • **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 Meeting Participants 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 panel, Editor Home, and Master 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 📄 that 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. Available editors include:

Education Plan

The Education Plan editor includes the various dates associated with the plan, why the IEP meeting was held, and how student progress is reported.

> This editor must be saved before entering data into other editors.

Education Plan Editor

▶ Click here to expand...

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 IEP Information section for additional information.

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**
100   Plainview Schools

District Address   **District Phone**
123 Main Street, Metro City, MT 55555   (763)555-5555

Enrollment Information Editor

▶ Click here to expand...

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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 IEP Information section for additional information.

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   **First Name**   **Middle Name**   **Suffix**
Abegg   Colton

Age   **Birthdate**   **Gender**
6   M

Federal Designation   **Federal Race(s)**   **Race, Ethnicity (state)**
4: Black or African American 4: Black or African American

Address   **Student Number**   **State ID**

Case Manager Information

Name   **Title**

Phone

Student Information Editor

▶ Click here to expand...

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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 Editor

▸ Click here to expand...

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Strengths/Concerns/Interests

The Strengths/Concerns/Interests editor lists the student's interests according to the student, as well as the student's strengths and needs according to the student's parents and school staff.

Strengths/Concerns/Interests

Consideration of Special Factors

The Consideration of Special Factors editor is used to document the special factors the team is considering when developing the student's plan.

Consideration of Special Factors

Transition Services

The Transition Services editor is used to document any transition services to be provided to the

student.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Transition Services NOT STARTED   Editor 7 of 27

Student's Desired Post-School Activities
In the areas of postsecondary education, vocational education, integrated employment (including supported employment), continuing and adult education, adult services, independent living or community participation.

Results of Age-Appropriate Transition Assessments

Training

Education

Transition Services Editor

▶ Click here to expand...

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Postsecondary Goals

The Postsecondary Goals editor describes measurable goals set for the student's postsecondary transition in the areas of Training and Education, Employment, and Independent Living Skills.

This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Measurable postsecondary goals are based on age-appropriate transition assessments related to training, education, employment, and, if appropriate, independent living skills. Clearly specify the desired level of achievement.

Training or Education 📄

Employment 📄

Where appropriate, Independent Living Skills 📄

Postsecondary Goals Editor

▶ Click here to expand...

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Course of Study

The Course of Study editor lists the courses taken by the student in each school year and the credits earned for each course, and basic graduation information including graduation date and total credits earned and needed.

> This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Course of Study

Anticipated Graduation Date
month/day/year 📅

Credits Earned to Date

Total number of credits for graduation *

Total Credits
0.00

School Year:

School Year

Semester	Course	Credits
	No records saved.	

|◀ ◀ ▶ ▶| 0 - 0 of 0 items

Course of Study

▶ Click here to expand...

Transition Services Needed

The Transition Services Needed editor lists the services provided to the student to help meet post-secondary goals in the areas of Instruction, Employment, Community Experiences, Post School Adult Living, Related Services, Daily Living Skills, and Functional Vocational Assessment.

> This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

Transition Services Needed (IN PROGRESS)   Editor 10 of 27

Each area must be considered by the IEP Team.

Instruction

☐ Discussed, not needed

Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement) 📄

[   ]

Person or Agency Responsible 📄

[   ]

Employment

☐ Discussed, not needed

Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement) 📄

Transition Services Needed

▶ Click here to expand...

Transfer of Rights

The Transfer of Rights editor indicates when the student was notified of the transfer of rights that occurs when the student turns 18.

> This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

The student has been informed of his or her rights under IDEA that will transfer to the student on reaching the age of majority. The student must be informed at least one year before the student reaches age 18.

Date student was informed of the transfer of rights

month/day/year 📅

Date student reaches the age of majority
06/10/2029

Transfer of Rights Editor

▶ Click here to expand...

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High School Graduation

The High School Graduation editor indicates whether the student will or will not meet the district's graduation requirements and receive a diploma.

> This editor only needs to be filled out when the "Secondary Transition information is needed for this student:" is marked under the Education Plan editor.

High School Graduation (NOT STARTED)   Editor 12 of 27

☐ The IEP team determined that the student **will meet** the district's graduation requirements, or will successfully complete the measurable annual goals **and** will not need new measurable annual goals. The IEP team will not develop a new Individualized Education Program and the student **is** expected to graduate with a regular diploma at the end of the current school year.

☐ The IEP team determined that the student **will not meet** the district's graduation requirements, **or** will not successfully complete the measurable annual goals, and will need new measurable annual goals for the coming school year. The student **is not** expected to graduate with a regular diploma at the end of the current school year and the IEP team must develop a new Individualized Education Program for the next school year.

☐ The student **will not meet** the district's graduation requirements. The student **will not receive** a regular diploma. The district **will not provide special education services** for the next school year due to district policy on the age through which educational services are available to other students.

Student's Current Grade:
KG

High School Graduation Editor

▶ Click here to expand...

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PLAAFPs/MAGs

The PLAAFPs and MAGs editor includes the student's present levels of academic achievement and functional performance, including skills and needs, and Measurable Annual Goals to chart student progress.

Progress Report Frequency

The Progress Report Frequency editor records how often progress reports are provided to the parents describing progress towards annual goals.

Progress Report Frequency NOT STARTED	Editor 14 of 27
When will progress reports on the measurable annual goal(s) be provided to the parents?	
Quarter ▼	

Progress Report Frequency

Special Education Services

The Special Ed Services editor lists services provided to the student in a Special Education setting.

Related Services

The Related Services editor lists developmental, corrective or other supportive services required to assist the student with a disability.

Least Restrictive Environment

The Least Restrictive Environment editor describes modifications made to the student's educational environment based on special education needs.

Least Restrictive Environment Editor

▶ Click here to expand...

Statewide Assessments

The Statewide Assessments editor lists the accommodations in state required assessments.

▶ Click here to expand...

Districtwide Assessments

The Districtwide Assessments editor lists student's level of participation or accommodation in district required assessments.

▶ Click here to expand...

Supp. Aids and Services

The Supplementary Aids and Services editor lists the accommodations and modifications made to assist the student in participating in regular education.

▶ Click here to expand...

Extended School Year

The Extended School Year editor indicates if the student requires services beyond the standard school time, such as beyond school hours or during breaks.

Extended School Year Editor

▶ Click here to expand...

Need for Reevaluation

The Need for Reevaluation editor indicates if a reevaluation is necessary.

> Only one option can be selected for the "Is a reevaluation necessary at this time?" field.

Need for Reevaluation Editor

Access. and Responsibilities

The Accessibility and Responsibilities editor describes how educational professionals will be notified of their responsibilities regarding the student's special education needs.

How will each teacher, related service provider, transportation provider and others working with this student be informed of his or her specific responsibilities for implementing this IEP and the accommodations, modifications, and supports that must be provided for this student?

☐ Copy of Accommodations/Modifications handout
☐ E-mail
☐ Verbal Communication
☐ Other

Accessibilities and Responsibilities Editor

▶ Click here to expand...

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Meeting Participants

The Meeting Participants 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...

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IEP Approval

The IEP Approval editor indicates if the case manager accepts and approves of the IEP.

I have read and understand my rights as provided to me in the pamphlet "Procedural Safeguards in Special Education under IDEA", which I received this school year. The parent shall be given a copy of this IEP at no cost to the parent.

Approval Decision
☑ I approve of this Individualized Education Program
☐ I approve of this Individualized Education Program with the following exceptions.

IEP Approval Editor

▶ Click here to expand...

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Prior Written Notice

The Prior Written Notice editor provides a space for descriptions and explanations related to proposed or refused actions for a student.

Prior Written Notice

▶ Click here to expand...

IEP Notes

The IEP Notes editor provides a space for any other relevant meeting notes to be included in the IEP.

Meeting Notes should be used to record:

- Any discussion of options considered, options rejected, and reasons for rejection of proposals for initiating or changing the student's identification, evaluation, educational placement or the provision of FAPE;
- Necessary information regarding IEP services not recorded elsewhere in the IEP document; and
- If the meeting was rescheduled, reason for rescheduling.

IEP Notes NOT STARTED

Meeting Notes should be used to record:

- Any discussion of options considered, options rejected, and reasons for rejection of proposals for initiating or changing the student's identification, evaluation, educational placement or the provision of FAPE;
- Necessary information regarding IEP services not recorded elsewhere in the IEP document; and
- If the meeting was rescheduled, reason for rescheduling

Meeting Notes

IEP Notes

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Previous Versions

Individual Education Plan (Montana) [.2223 - .2235]

Individual Education Plan (Montana) [.2211 - .2219]