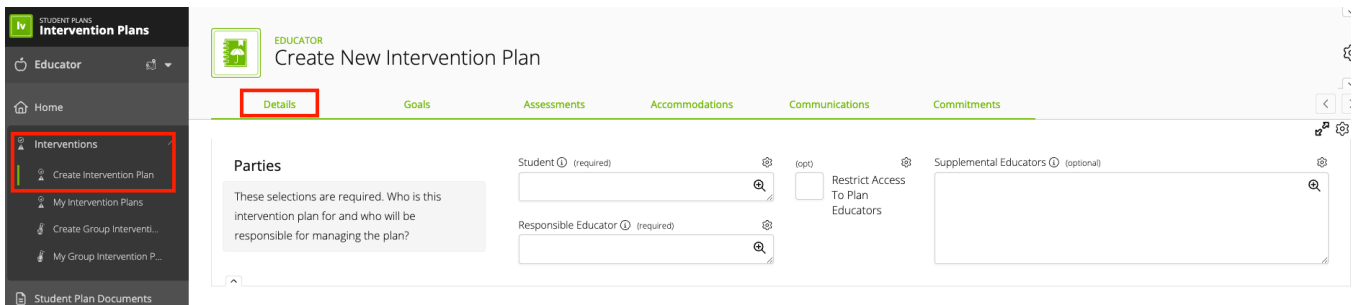


## Individual Intervention Plan Guide (Connect)

Here, you will learn how to configure and manage individual intervention plans.

### Creating An Individual Plan (Details Tab)

1. Start by selecting **Interventions** in the left navigation menu, then choose **Create Intervention Plan**.
2. This will bring you to the **Details tab** of **Create New Intervention Plan**. Some fields on this form are optional, but you must complete each required field to save the new plan.



The screenshot shows the 'Create New Intervention Plan' interface. On the left, a navigation menu is visible with 'Interventions' selected and 'Create Intervention Plan' highlighted. The main content area is titled 'Create New Intervention Plan' and has several tabs: 'Details' (active), 'Goals', 'Assessments', 'Accommodations', 'Communications', and 'Commitments'. Under the 'Details' tab, there is a 'Parties' section with a note: 'These selections are required. Who is this intervention plan for and who will be responsible for managing the plan?'. Below this note are three fields: 'Student (required)', 'Responsible Educator (required)', and 'Supplemental Educators (optional)'. Each field has a magnifying glass icon for search. To the right of the 'Responsible Educator' field is a checkbox labeled 'Restrict Access To Plan Educators'.

3. In the **Parties** section, click the **magnifying glass** in the **Student** field, then select the **checkbox** next to the desired student.
4. Click the **magnifying glass** in the **Responsible Educator** field, then select the **checkbox** next to the Educator who should manage and add content to the plan.
5. Filling in the **Supplemental Educators** field is optional and can be completed in the same way as the Responsible Educator.
6. Optionally, click the **Restrict Access to Plan Educators** box.
7. Next, under the **Intervention Support Type** section, select one **Target Condition**. Based on that selection, the intervention/Support menu will provide a unique list of support options. A student plan allows for one Intervention/Support per plan.
  - a. Click the **magnifying glass** in the **Targeted Condition** field and select the **checkbox** next to the appropriate Targeted Condition.
  - b. Click the **magnifying glass** in the **Intervention/Support** field and click the **checkbox** next to the appropriate Intervention/Support. The options you see here are based on the Targeted Condition you chose.
  - c. Optionally, select the **Contributing Factors** similarly and fill in any **Contributing Factors Notes**.

**Intervention Support Type**

Select one Targeted Condition from the dropdown menu. Based on that selection, the Intervention/Support menu will provide a unique list of support options. A student plan allows for one Intervention/Support per plan.

 Targeted Condition <sup>Ⓢ</sup> (required)

 Intervention/Support <sup>Ⓢ</sup> (required)

Contributing Factors (optional)

Contributing Factors Notes (optional)

8. Under the **Schedule section**, click **Start Date** and **End Date**, then choose the appropriate dates.
9. Filling in the **Detailed Schedule Information** is optional, but can be used to identify specific days, times, locations, etc. that are unique to this plan.

**Schedule**

Start and end dates are required to save a plan. The detailed schedule section can be used to identify specific days, times, locations, etc. that are unique to this plan.

 Start Date <sup>Ⓢ</sup> (required)

 Detailed Schedule Information <sup>Ⓢ</sup> (optional)

 End Date <sup>Ⓢ</sup> (required)

10. Under the **Check-In section**, you can set the **Frequency** at which an individual must check in with the student, as well as the **Duration** of the session. These two fields are not required but are highly recommended.
  - a. Click the **magnifying glass** in the field, then select the **checkbox** next to the appropriate selection.

**Check-In**

Set the frequency that an individual will need to check in with the student and the time allotted for the session. This option is not required but highly recommended.

 Frequency <sup>Ⓢ</sup> (optional)

 Duration <sup>Ⓢ</sup> (optional)

11. Under the **Description section** are the **Label** and **Description** fields. You will only need to populate this label if you need to modify how the plan displays in lists. The label can be used to distinguish between multiple plans for a single student. If you do not specify a label, the plan will automatically be labeled with the student's name.

**Description**

The label can be used to distinguish between multiple plans for a single student: "Caleb Smith's Small-Group Reading Plan." If you do not specify a label, the plan will automatically be labeled with the student's name.

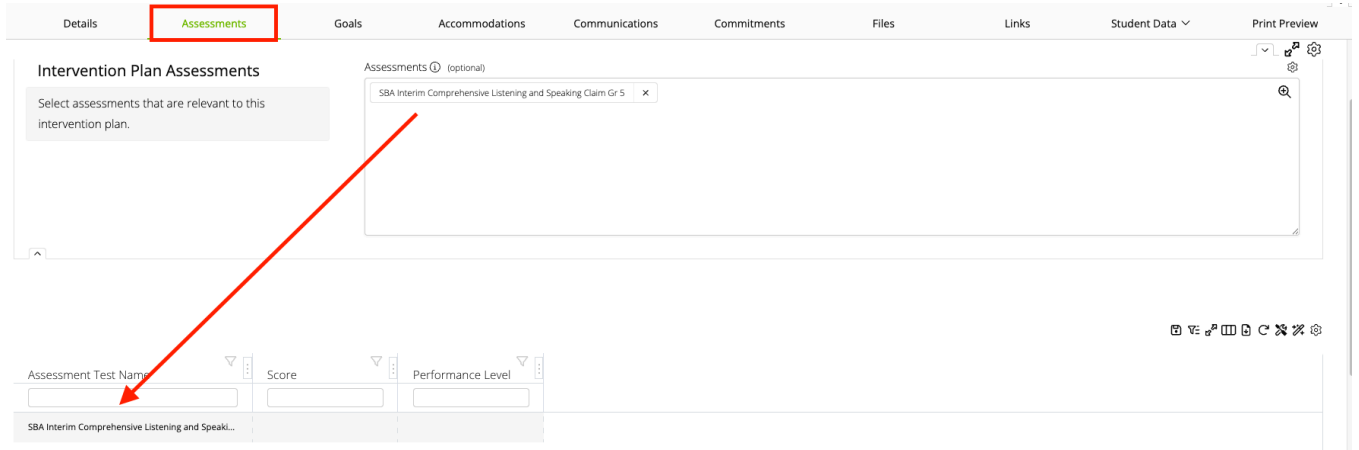
 Label <sup>Ⓢ</sup> (optional)

 Description <sup>Ⓢ</sup> (optional)

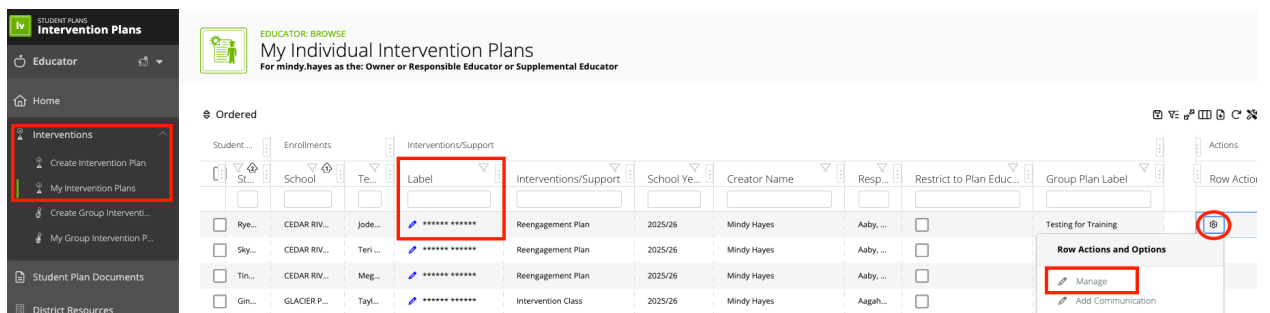
12. Lastly, in the **Intervention Outcome section**, you may enter an **Outcome**.
13. Click the **Save** button when finished. This will take you to the plan you just created, where you can further manage the Details tab or complete information on any of the other tabs.
14. To return to this page later to manage the plan, click **Interventions** in the left navigation menu, then choose **My Intervention Plans**.

## Assessments Tab

1. Select the **Assessments tab** from the top of the **Manage Intervention Plan** page.



- a. Optionally, start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.
- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.

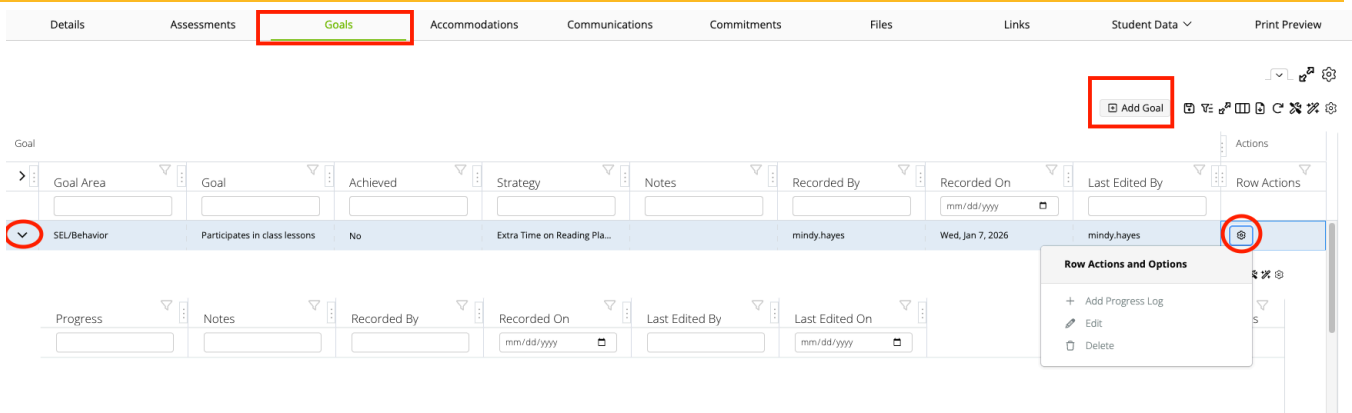


Student	Enrollments	Interventions/Support	School Ye...	Creator Name	Resp...	Restrict to Plan Educ...	Group Plan Label	Actions
<input type="checkbox"/>	Rye... CEDAR RIV... Jode...	*****	Reengagement Plan	2025/26	Mindy Hayes	Aaby...	Testing for Training	
<input type="checkbox"/>	Sky... CEDAR RIV... Teri...	*****	Reengagement Plan	2025/26	Mindy Hayes	Aaby...		
<input type="checkbox"/>	Tin... CEDAR RIV... Meg...	*****	Reengagement Plan	2025/26	Mindy Hayes	Aaby...		
<input type="checkbox"/>	Gin... GLACIER P... Tayl...	*****	Intervention Class	2025/26	Mindy Hayes	Aagah...		

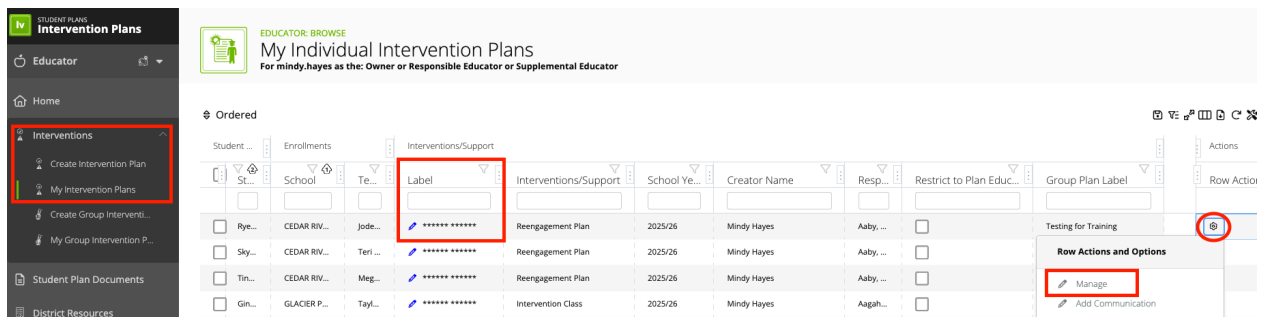
2. Click on the **magnifying glass** in the **Assessments** field, select one or more **checkboxes** to the left, and click **Accept**.
  - a. Above each column are hidden options, such as filters. This lets you quickly search for an assessment.
3. Assessments will be listed in the table below, along with their Score and Performance Level.

## Goals Tab

1. Select the **Goals tab** from the top of the **Manage Intervention Plan** page.



- a. Optionally, start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.



- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.
2. Click the **Add Goal** button in the top right to create a goal associated with this student's plan.
    - a. Select the **magnifying glass** in the **Goal Area** field and click the **checkbox** to the left. These selectors are specific to your district and will filter the Goals list, allowing you to select an individual goal.
    - b. Select the **magnifying glass** in the **Goal** field and click the **checkbox** to the left. The goal selector is conditionally related to the goal subject area selected in the previous step.
    - c. Optionally, similarly select a **Goal Strategy** field.
    - d. Optionally fill in any additional **Notes** if specifics are needed.
    - e. The **Recorded On Date** is automatically set but may be edited.
    - f. Click **Save**.

### Edit Intervention Plan Goal

Here, you will see the Goal that was input for this student Intervention Plan. If you need to change the goal details, you can by making new selections and saving the form. You can only view the original creation date, but it will record your most recent updated date as well.

Goal Area (required)

Goal (required)

Goal Strategy (optional)

Notes (optional)

Sample

Recorded On

Goal is Achieved (optional)

3. Once the goal is created, use the **Row Action** gear to the far right to periodically log the student's progress toward or achievement of the goal, edit, or delete it.

**a. Add Progress Log**

- i. You will see a data table of the goal. If you prefer to add an additional goal, click the **Add Record** button in the top right.
- ii. In the **Goal Progress** section, click the **magnifying glass** in the **Progress Selection** field and select the **checkbox** to the left of the progress log descriptor. This list is specific to your district.
- iii. Fill in **Progress Determination Notes**.
- iv. Click **Save**.
- v. The progress note is now nested under the Goal and may be viewed by clicking the **arrow** to the left.

Goal Details Data Table (optional)

Goal Area	Goal	Notes	Recorded By	Recorded On	Last Edited By	Last Edited On
SEL/Behavior	Participates in class lessons		mindy.hayes	2026-01-07	mindy.hayes	2026-01-07

Goal Progress

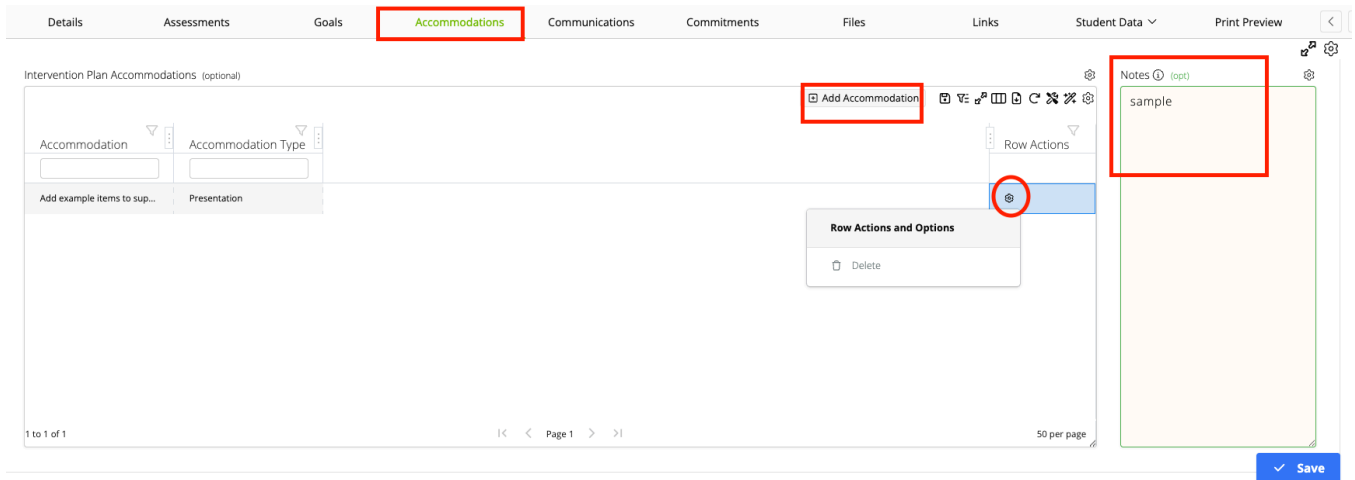
Progress Selection (req)

Progress Determination Notes (required)

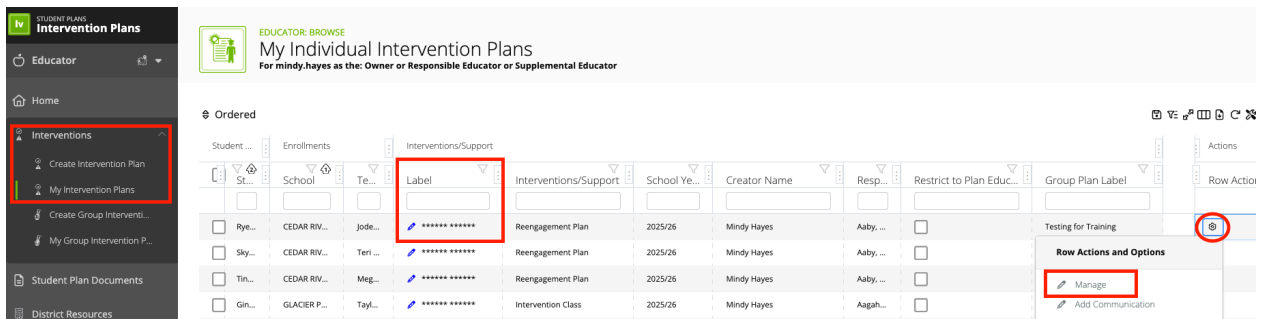
Sample

## Accommodations

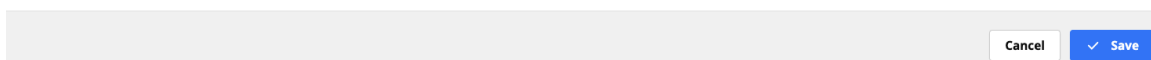
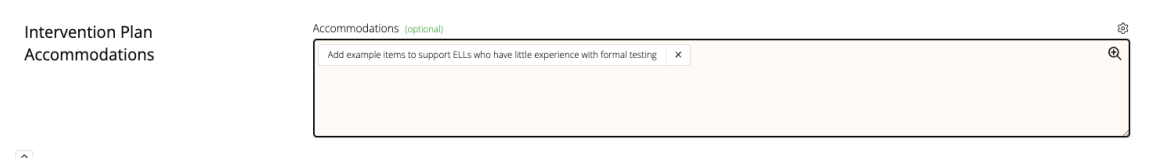
1. Select the **Accommodations** tab at the top of the **Manage Intervention Plan** page.



- a. Optionally, start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.



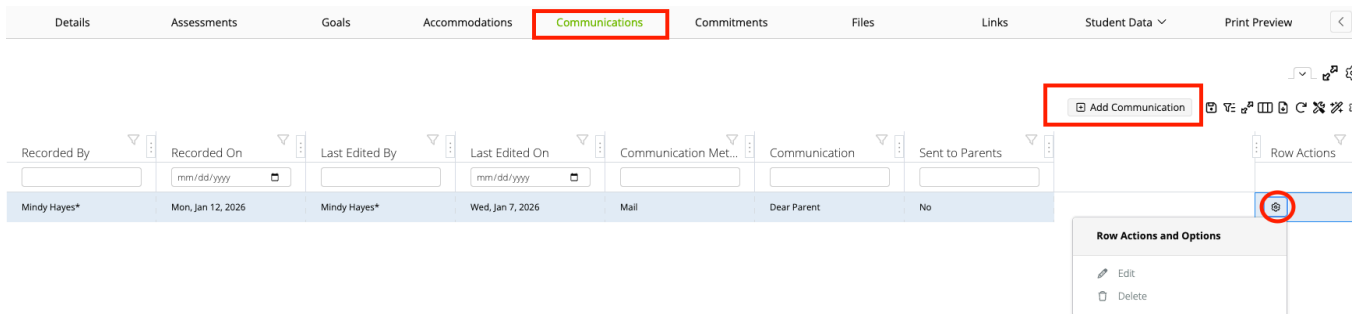
- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.
2. Click the **Add Accommodation** button in the top right.
- a. Click the **magnifying glass** in the **Accommodations** field, click one or more **checkboxes** to the left, and click **Accept**.
  - b. Click **Save**.



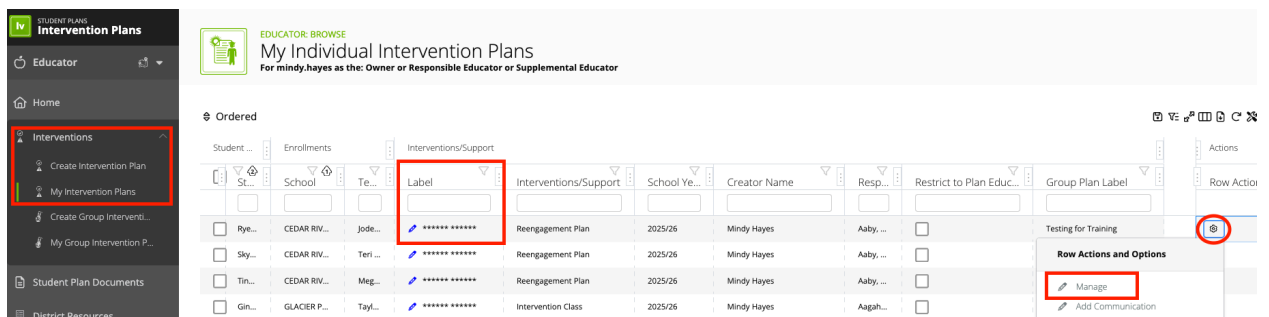
3. You will see the accommodations listed in the Intervention Plan Accommodations table.
4. Select the **Row Actions Gear** to the far right for the accommodation and choose **Delete** to remove the accommodation.
5. Add any additional **Notes** to the far right and click **Save** in the bottom right when finished.

## Communications

1. Select the **Communications** tab at the top of the **Manage Intervention Plan** page.




- a. Continue creating or start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.




- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.
2. Click the **Add Communication** button in the top right.
    - a. Choose a **Recorded Date** from the calendar.
    - b. The **Last Edited Date** will be automatically configured.
    - c. Click the **magnifying glass** in the **Communication Method** field and select the **checkbox** to the left.
    - d. Optionally, select **Yes** or **No** from the **Sent to Parent(s)** dropdown menu.
    - e. Fill in the **Communication** field.
    - f. Click **Save**.

Parent Communication

Recorded Date (required)  

Last Edited Date

Communication Method (required)  

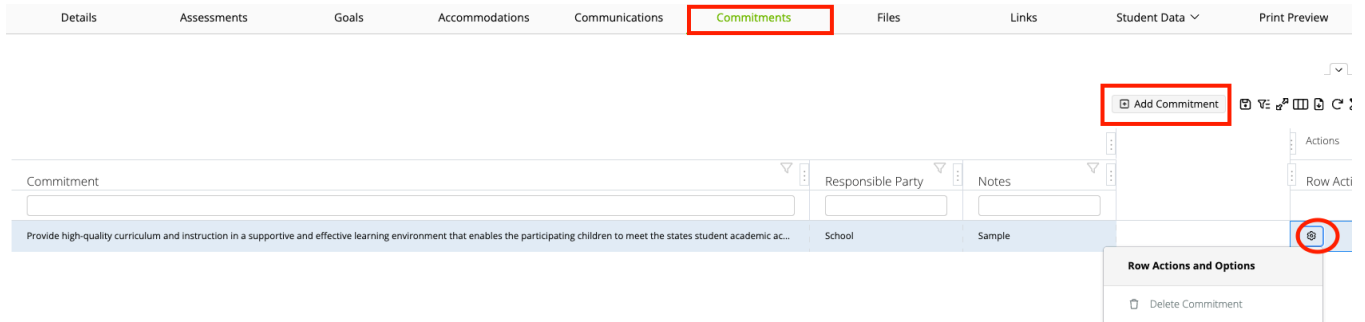
Sent to Parent(s) (optional)

Communication (required)





3. You will see the communication listed in the Communications table.
4. Click the **Row Actions Gear** to the right of the communication to **Edit** or **Delete**.
  - a. When deleting, a confirmation pop-up window will appear. Click Yes to continue deleting. **Note:** this action is irreversible.


## Commitments

1. Select the **Commitments** tab from the top of the **Manage Intervention Plan** page.



Details   Assessments   Goals   Accommodations   Communications   **Commitments**   Files   Links   Student Data ▾   Print Preview

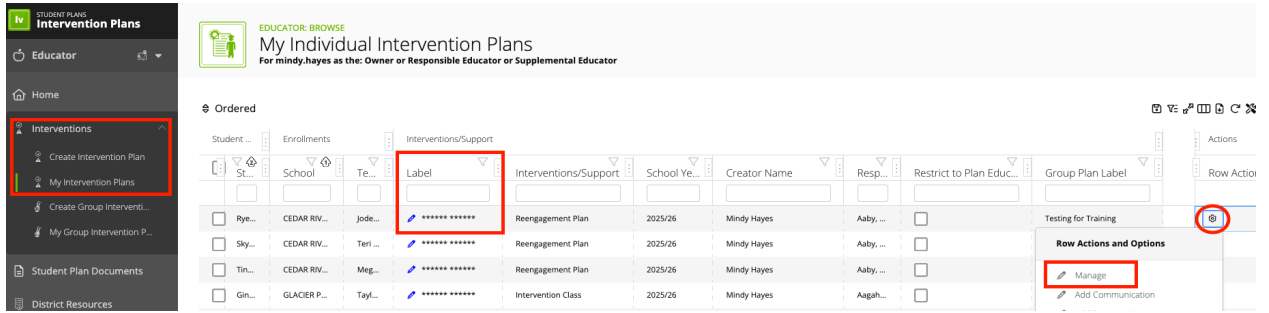
   

Commitment	Responsible Party	Notes	Row Actions
Provide high-quality curriculum and instruction in a supportive and effective learning environment that enables the participating children to meet the states student academic ac...	School	Sample	

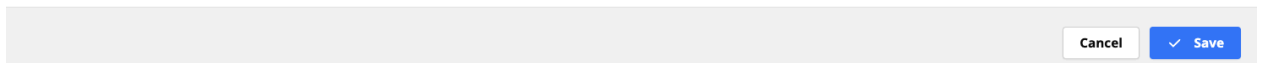
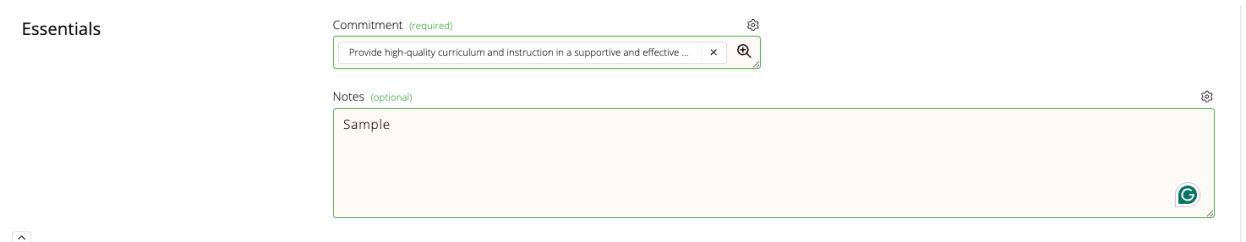
**Row Actions and Options**

- 

- a. Optionally, start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.



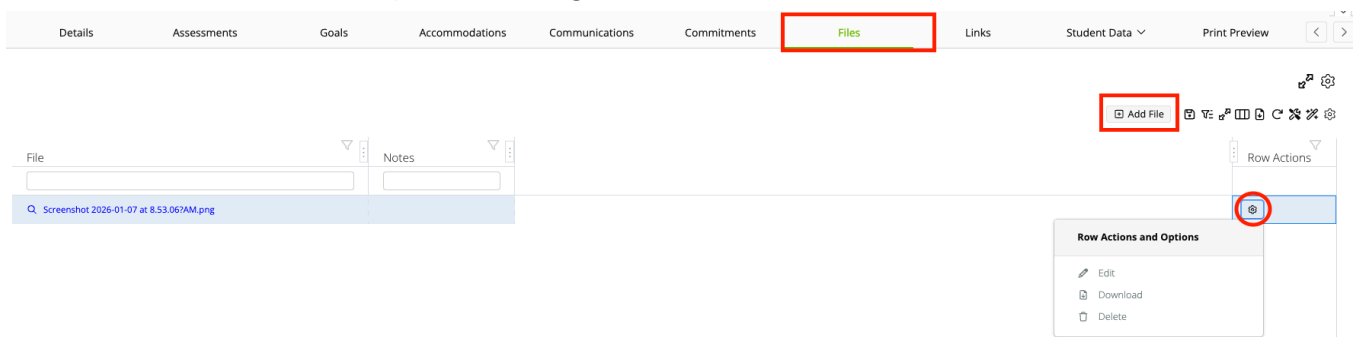
- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.
2. Click the **Add Commitment** button in the top right.
    - a. Click the **magnifying glass** in the **Commitment** field, click one or more **checkboxes** to the left, and click **Accept**.
    - b. Add any **Notes**.
    - c. Click **Save**.



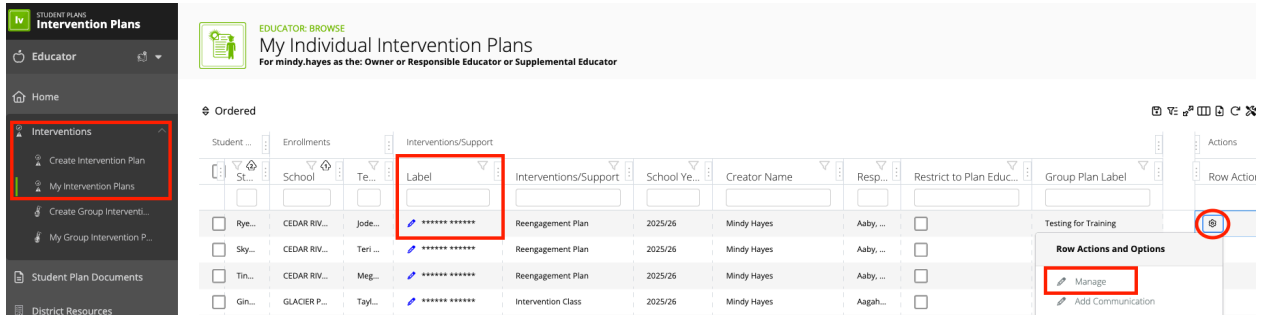
3. You will see the commitment listed in the commitment table.
4. Select the **Row Actions Gear** to the right of the commitment and choose **Delete Commitment** to remove.

## Files Tab

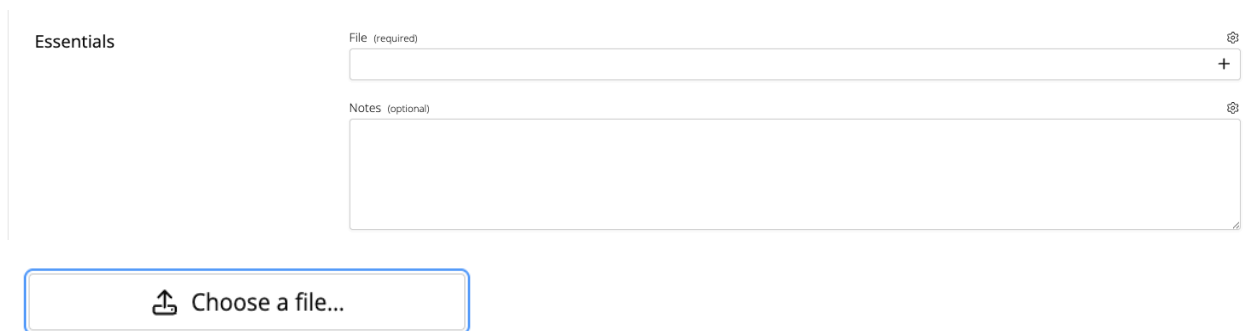
1. Select the **Files** tab from the top of the **Manage Intervention Plan**.




- Optionally, start by selecting Interventions in the left navigation menu, then choose My Intervention Plans.
- You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.



- Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.
- Click the **Add File button** in the top right.
    - Click on the **File field**, click **Choose Files**, open the file, and click **Accept**.
    - Optionally, fill in any **Notes**.
    - Click **Save**.

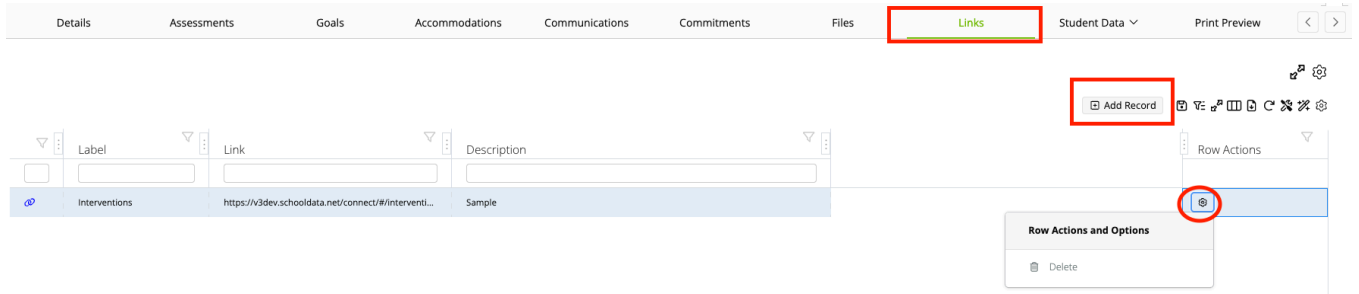


Screenshot 2026-01-07 at 8.53.06AM.png 

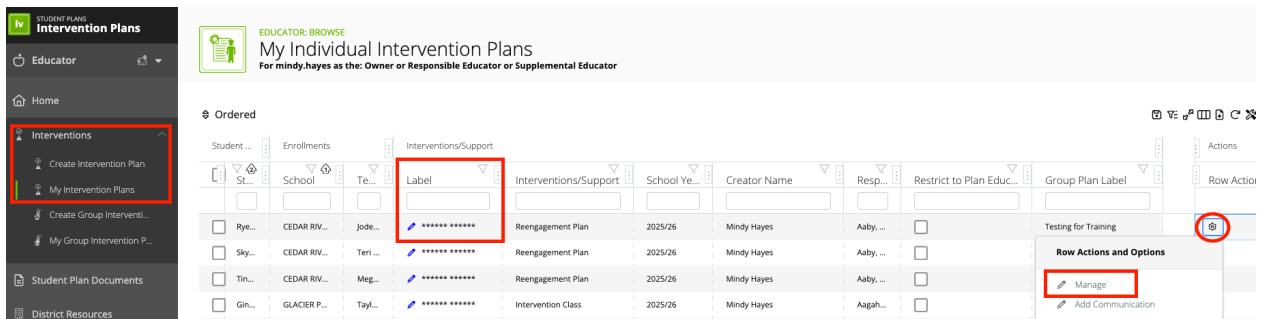
- You will see the file listed in the Files table.
- Select the file's **Row Actions Gear** to the far right and choose **Edit**, **Download**, or **Delete**.
  - A confirmation pop-up window will appear when deleting. Click Yes to continue deleting. Note, this action is irreversible.

## Links tab

- Select the **Links tab** from the top of the **Manage Intervention Plan page**.



- a. Optionally, start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
- b. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.



- c. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.

2. Click the **Add Record** button in the top right.
  - a. Fill in the **URL**, **Label**, and **Description** fields.
  - b. Click **Save**.

**Essentials**

Enter the link information

URL (required)

Label (required)

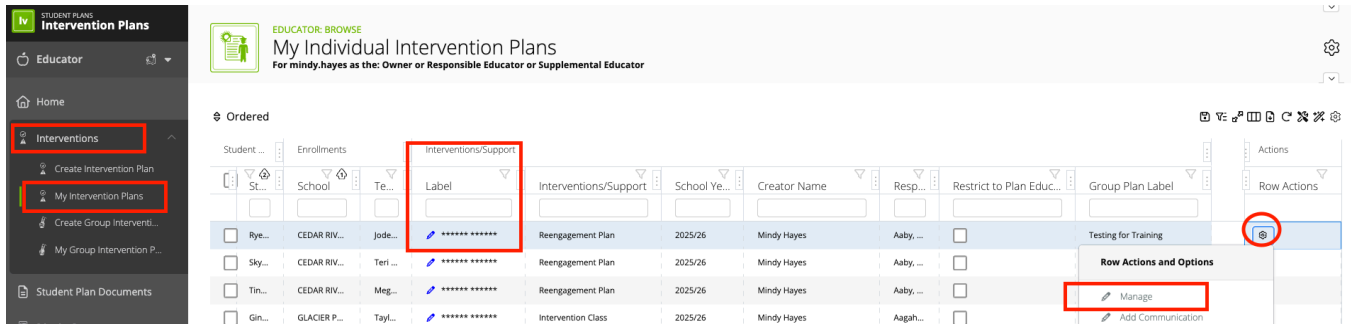
Description (optional)

Cancel Save

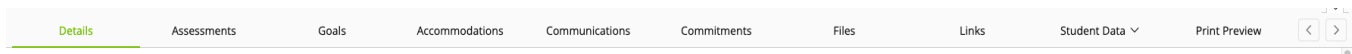
3. You will see the file listed in the Files table.
4. Select the file's **Row Actions Gear** at the far right, then choose **Delete**.

## Managing My Individual Intervention Plans

1. Start by selecting **Interventions** in the left navigation menu, then choose **My Intervention Plans**.
2. You will see a data table of Intervention Plans you have created, or you have been assigned as the Responsible or Supplemental Educator.
3. Click the **Label (pencil icon)**, or select the **Row Actions gear** to the far right, and choose **Manage**.

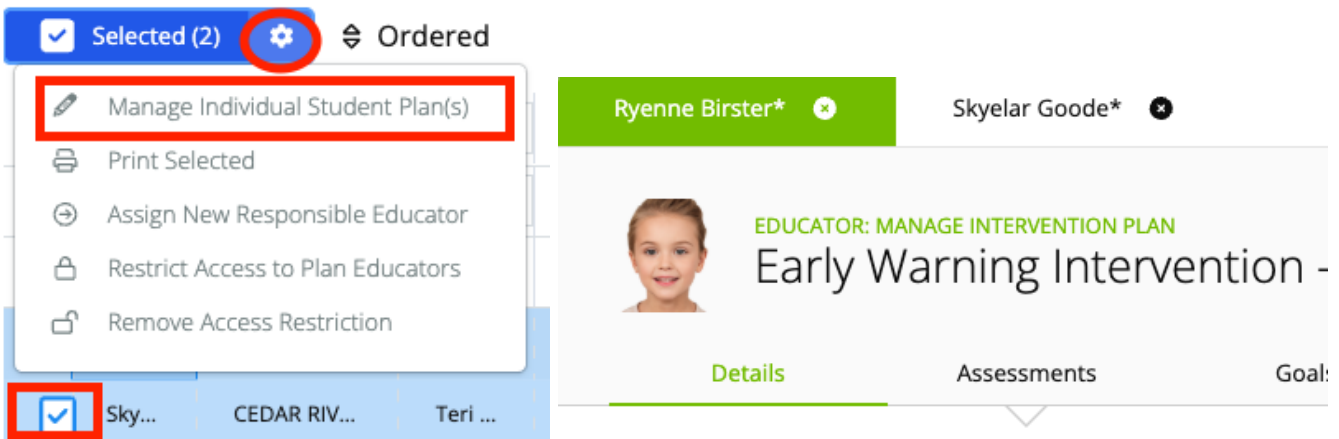


4. A page or pop-over window will appear with multiple subpages (tabs) across the top.



- Details:** This is where you can edit the Start and End Dates, Check-In details, Description, and Outcome items.
- Assessments:** Select assessments. Once scores become available, they will be displayed with the performance level.
- Goals:** Use the Add Goal button to create a goal associated with the student's plan. Once the goal is created, periodically log the student's progress or achievement of the goal.
- Accommodations:** This allows you to add one or more individualized accommodations.
- Communications:** This will enable you to add correspondence with family members or track internal communications.
- Commitments:** This allows you to identify which responsible parties in the plan will do what.
- Files:** This allows you to add third-party files or reports that would be helpful for this plan.
- Links:** This allows you to add third-party links that would be helpful for this plan.
- Student Data:** Use the dropdown menu to view the following:
  - Additional Services:** View the student's program and service enrollments for the current year.
  - Attendance History:** View the student's attendance History Summary over all School Years.
  - Languages:** View the student's home, native, and family preferred languages.
  - Students' Profile:** View the student's profile, including personal, contact, family, and other info.
- Print Preview:** This lets you preview the data you entered and how it will appear in the standard report.

5. Click the “X” to close the pop-over window, or select **My Intervention Plans** under Interventions in the left navigation menu to return to your list of plans.
6. To open multiple plans to manage at once, select the **checkbox(s)** to the left of the student name in the **My Intervention Plans** list.
  - a. Click the **Selected button gear** in the top left and choose **Manage Individual Student Plan(s)**.
  - b. Each student will have a tab at the top of the new pop-over window containing the entire plan. This will allow you to bounce between those students to edit.



The screenshot illustrates the process of managing multiple intervention plans. On the left, a list of students is shown with a blue header bar containing a checkmark, 'Selected (2)', a gear icon (circled in red), and 'Ordered'. A dropdown menu is open, with 'Manage Individual Student Plan(s)' highlighted by a red box. Other menu options include 'Print Selected', 'Assign New Responsible Educator', 'Restrict Access to Plan Educators', and 'Remove Access Restriction'. Below the menu, a row of student names is visible, with the first one 'Sky...' having a checked checkbox (also highlighted by a red box). On the right, a pop-over window displays the details for an 'Early Warning Intervention' plan. The window has a green header with the names 'Ryenne Birster\*' and 'Skyelar Goode\*'. Below the header, there is a student photo and the text 'EDUCATOR: MANAGE INTERVENTION PLAN'. The main title of the plan is 'Early Warning Intervention -'. At the bottom of the pop-over, there are three tabs: 'Details' (highlighted in green), 'Assessments', and 'Goal:'.