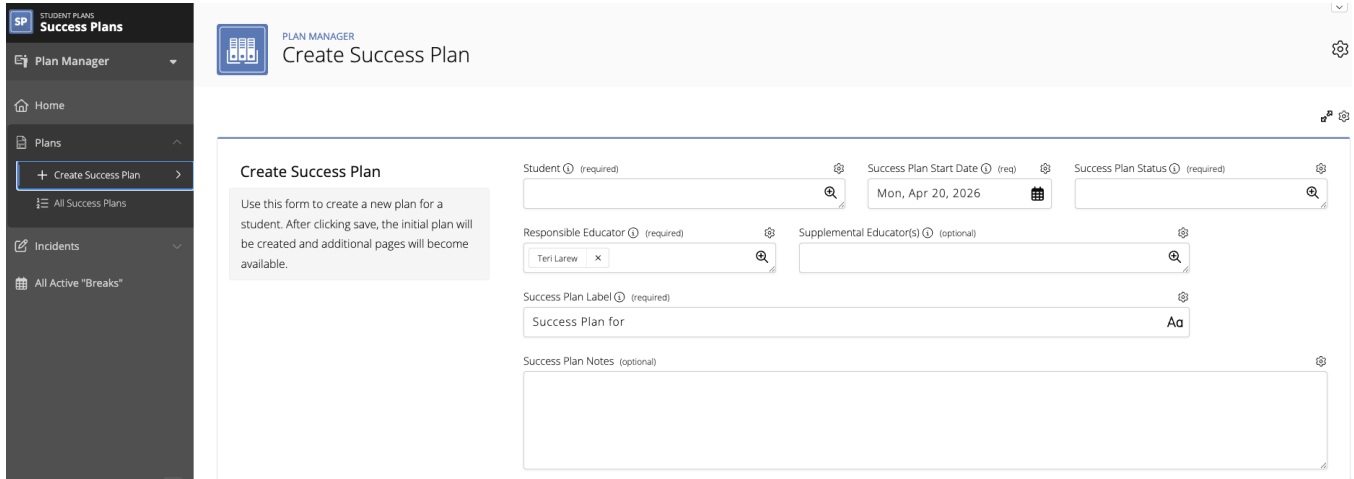


Create a Success Plan (Connect)

Here, you will learn how to create a success plan for a student.

1. Start in the left navigation menu and choose **Plans**, then **Create Success Plan**.



The screenshot shows the 'Create Success Plan' form. The left navigation menu is open, showing 'Success Plans' and 'Create Success Plan' selected. The main form area contains the following fields:

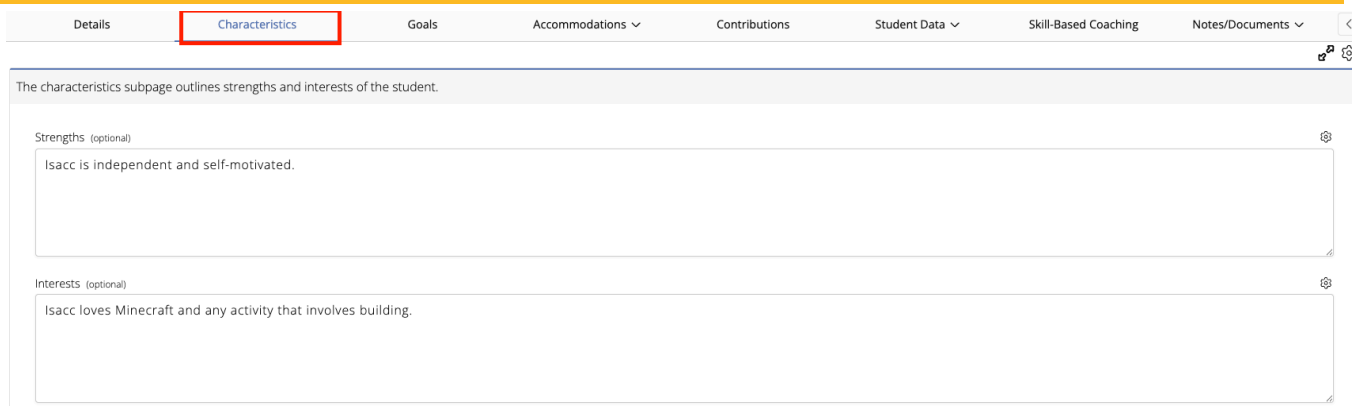
- Student** (required): A search field with a magnifying glass icon.
- Success Plan Start Date** (required): A date picker showing 'Mon, Apr 20, 2026'.
- Success Plan Status** (required): A dropdown menu.
- Responsible Educator** (required): A search field with a magnifying glass icon, showing 'Teri Larew'.
- Supplemental Educator(s)** (optional): A search field with a magnifying glass icon.
- Success Plan Label** (required): A text field with 'Success Plan for' and a font color icon.
- Success Plan Notes** (optional): A large text area.

2. Click the **magnifying glass** in the **Student** field, and click a **checkbox** to the left.
3. The **Success Plan Start Date** will automatically fill with today's date.
4. Click the **magnifying glass** in the **Success Plan Status** field and click a **checkbox** to the left.
5. Select the **Responsible Educator** field similarly.
6. Optionally, you may choose one or more **Supplemental Educator(s)** similarly and click **Accept**.
7. The **Success Plan Label** will automatically fill, but may be edited as needed.
8. Fill in any **Success Plan Notes** as needed.
9. Click **Save**.
10. You will see the **Manage Success Plan page** with several subpages (tabs) across the top. It will default to the **Details** tab, which contains all the basic information about the plan you just entered.

Characteristics Tab

Here, you will learn how to outline the student's strengths and interests.

1. Continue from the **Create Success plan task**.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.



The characteristics subpage outlines strengths and interests of the student.

Strengths (optional)

Isacc is independent and self-motivated.

Interests (optional)

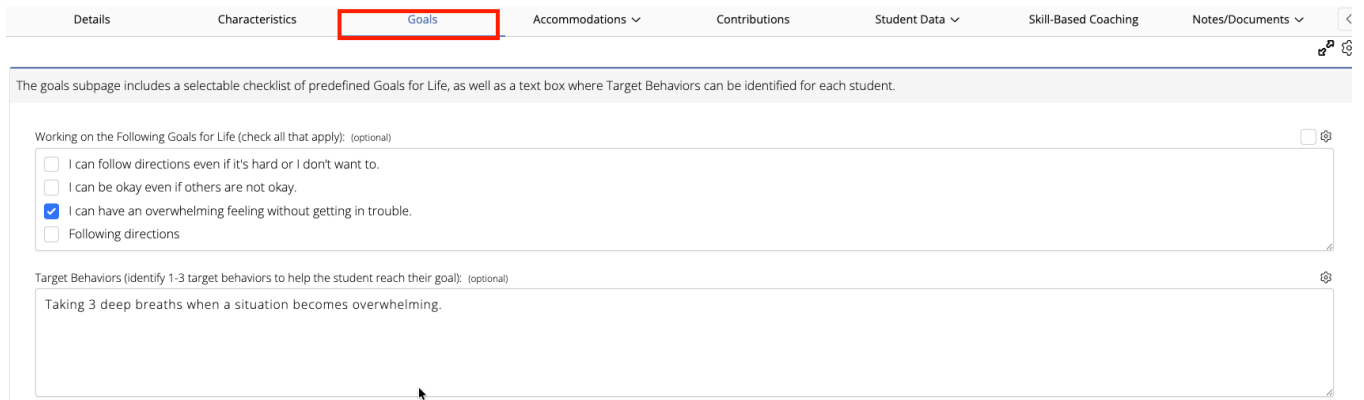
Isacc loves Minecraft and any activity that involves building.

2. Click the **Characteristics tab** at the top of the page.
3. Fill in the **Strengths** and **Interests** fields.
4. Click **Save**.

Goals Tab

Here, you will learn how to select predefined Goals for Life, as well as create Target Behaviors.

1. Continue from the **Create Success plan task**.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.



The goals subpage includes a selectable checklist of predefined Goals for Life, as well as a text box where Target Behaviors can be identified for each student.

Working on the Following Goals for Life (check all that apply): (optional)

I can follow directions even if it's hard or I don't want to.

I can be okay even if others are not okay.

I can have an overwhelming feeling without getting in trouble.

Following directions

Target Behaviors (identify 1-3 target behaviors to help the student reach their goal): (optional)

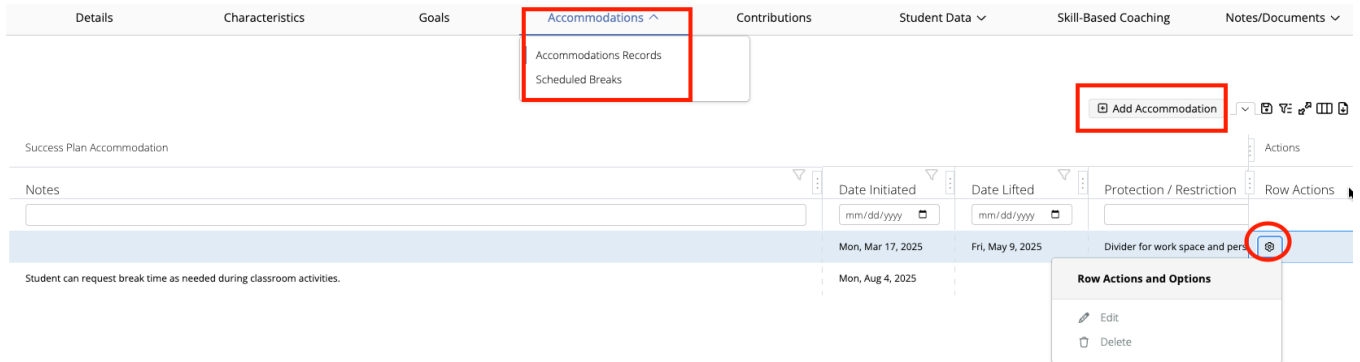
Taking 3 deep breaths when a situation becomes overwhelming.

2. Click the **Goals tab** at the top of the page.
3. Click all **checkboxes** that apply to the left in the **Working on the Following Goals for Life** field.
4. Fill in the **Target Behaviors** field. Identify 1-3 target behaviors to help the student reach their goal.
5. Click **Save**.

Accommodation Tab

Here, you will learn how to select accommodations and scheduled breaks.

1. Continue from the **Create Success plan task**.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.
2. Click the **Accommodations tab** at the top of the page and choose one of the following from the dropdown menu:



- a. **Accommodations Records:** Here, you can identify accommodations or supports implemented to help the student reach their goals. If no date is listed in the **Date Lifted** column, the accommodation should be considered active.
 - i. Click the **Add Accommodation button** in the top right.
 1. Click the **magnifying glass** in the **Accommodation** field and click the **checkbox** to the left.
 2. Select the **Date Initiated**.
 3. The **Date Lifted** should be left blank while the accommodation is active. When the accommodation is to be lifted, come back in and select the date.
 4. Fill in any **Notes**.
 5. Click **Save**.

Add Accommodation

Accommodation (required)

Date Initiated (optional)

Date Lifted (optional)

Notes (optional)

- ii. Click the **Row Action Gear** to the far right to **Edit** or **Delete**.
- b. **Scheduled Breaks:** Here, you will list all scheduled breaks assigned to the student. If the **Date Terminated** column is blank, this is the accommodation the student is currently receiving.
 - i. Click the **Add Scheduled Break button** in the top right.
 1. Click the **magnifying glass** in the **Break Reason Selection** field and click the **checkmark** to the left.

2. Fill in the **Scheduled Break Start and End Time** if needed.
3. Fill in the **Scheduled Break Date Initiated**.
4. The **Scheduled Bread Date Terminated Date** should be left blank while a break is active. When the break is to be terminated, come back in and select the date.
5. Fill in any **Notes**.
6. Click **Save**.

Essentials

Break Reason Selection (required)	Scheduled Break Start Time (optional)	Scheduled Break End Time (optional)
<input type="text"/>	HH : MM AM	HH : MM AM
Scheduled Break Date Initiated (optional)	Scheduled Break Date Terminated (optional)	
<input type="text"/>	<input type="text"/>	
Scheduled Break Notes (optional)		
<input style="width: 100%; height: 40px;" type="text"/>		

Contributions Tab

Here, you will learn how to outline both students' and staff contributions during crisis management.

1. Continue from the **Create Success plan task**.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.

Details	Characteristics	Goals	Accommodations ▾	Contributions	Student Data ▾	Skill-Based Coaching	Notes/Documents ▾
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The Contributions page outlines both the student's Job Contributions as well as an area to outline staff contributions during crisis management.

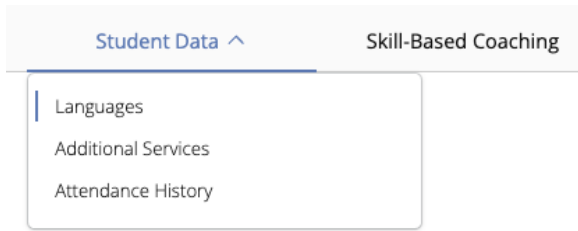
Student's Job Contribution (optional) <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> Student will be the line leader each week when leaving the classroom for Library and Music. </div>
Crisis Management (optional) <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> n/a at this time </div>

2. Click the **Contributions tab** at the top of the page.
3. Fill in the **Student's Job Contribution** and **Crisis Management** fields.
4. Click **Save**.

Student Data Tab

Here, you will learn how to view languages, additional services, and attendance history data.

1. Continue from the **Create Success plan task**.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.

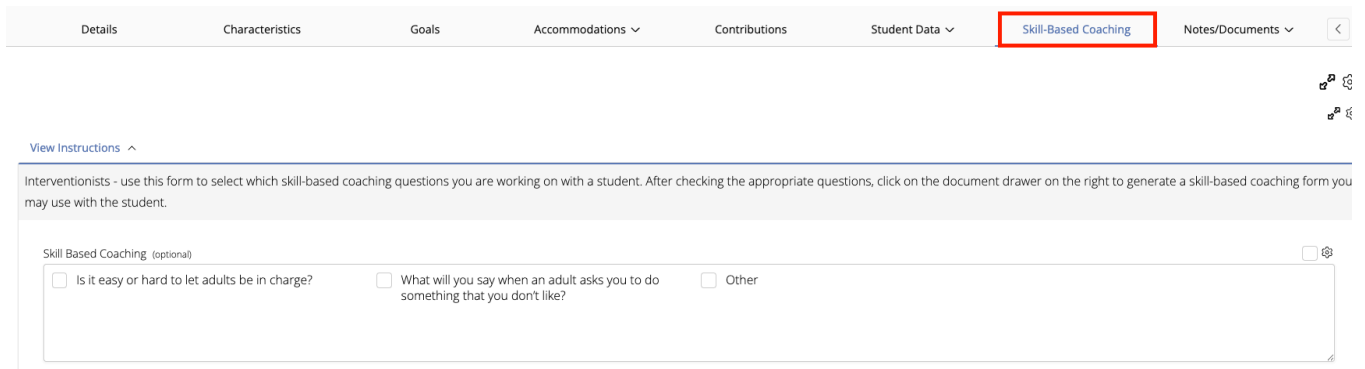


2. Click the **Student Data** tab at the top of the page and choose one of the following options from the dropdown menu:
 - a. **Languages:** Here, you can view the students' home, native, and family preferred languages.
 - b. **Additional Services:** Here, you can view the student's program and service enrollments.
 - c. **Attendance History:** Here, you can view the student's attendance history summary.

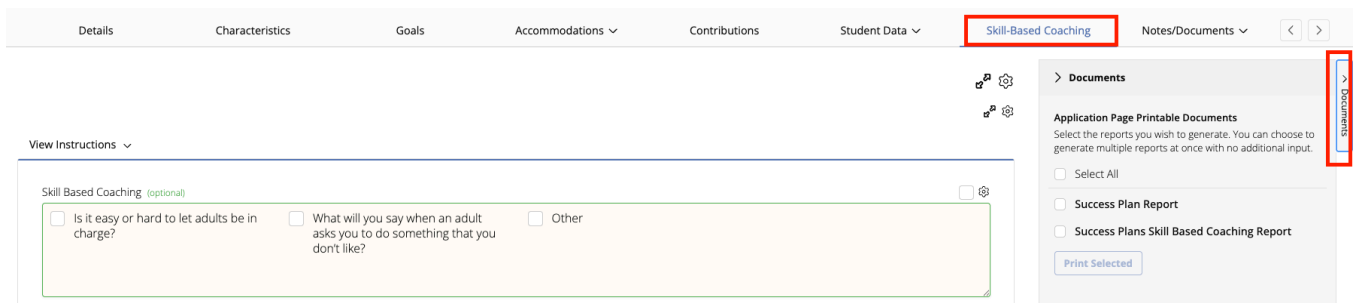
Skill-Based Coaching Tab

Here, you will learn how to select which skill-based coaching question you are working on with a student.

1. Continue from the **Create Success plan** task.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.



2. Click the **Skill-Based Coaching** tab at the top of the page.
3. Select one or more **checkboxes** in the **Skill-Based Coaching** field.
4. Click the **Document Drawer** to the right to generate a skill-based coaching form you may use with the student.

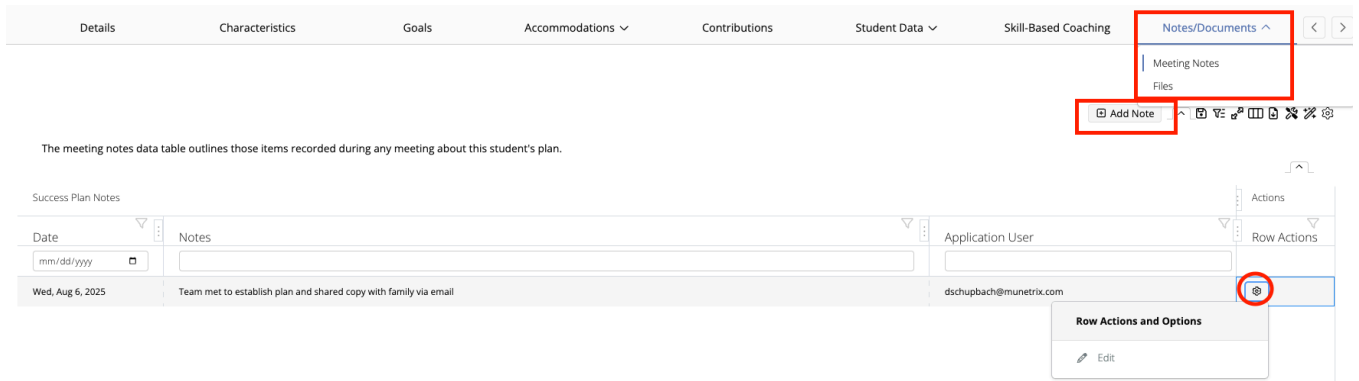


- a. Click the **checkbox** to the left of one of the selections under the **Application Page Printable Documents**:
 1. **Select All**
 2. **Success Plan Report**
 3. **Success Plans Skill Based Coaching Report**


- i. **Select All**
 - ii. **Success Plan Report**
 - iii. **Success Plans Skill-Based Coaching Report**
- b. Click the **Print Selected** button. The report will be generated and will be downloaded to your computer.

Notes/Documents Tab

1. Continue from the **Create Success plan** task.
 - a. Alternatively, start under **Plans** in the left navigation, choose **All Success Plans**, and click the **magnifying glass** in the **View** column.





The meeting notes data table outlines those items recorded during any meeting about this student's plan.

Date	Notes	Application User	Row Actions
Wed, Aug 6, 2025	Team met to establish plan and shared copy with family via email	dschupbach@munetrix.com	

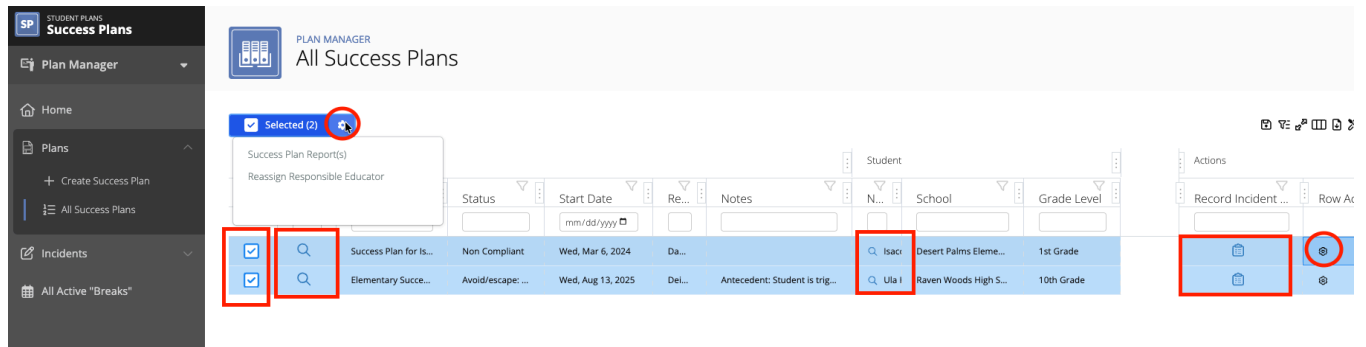
Row Actions and Options
 Edit

2. Click the **Notes/Documents** tab at the top of the page and choose one of the following options from the dropdown menu:
 - a. **Meeting Notes:** Here, you may add meeting notes.
 - i. Click the **Add Notes** button in the top right.
 1. Fill in the **Notes** and click **Save**.
 - ii. Click the **Row Actions Gear** to the far right to **Edit** or **Delete**.
 - b. **Files:** Here, you may add additional files to the plan.
 - i. Click the **Add File to Plan** button in the top right.
 1. Click the “+” icon in the File field, click the **Choose a file** button, select your file, and click **Accept**.
 2. Fill in any **Notes**.
 3. Click **Save**.

Essentials	File (required)  <input style="width: 100%; height: 20px;" type="text"/> +
	Notes (optional)  <div style="height: 40px;"></div>

Manage All Success Plans

1. Start under **Plans** in the left navigation, and choose **All Success Plans**.
2. You will see a data table of all Success Plans for all students.



3. Click the magnifying glass in the **View** column to view the **Manage Success Plan** page.
4. Click the magnifying glass in the **Student Name** Column to view the **Student Dashboard** page.
5. Click the **clipboard** icon in the **Record Incident** column to create a behavioral intervention report.
6. Click the **Row Action Gear** to the far right to **Delete**. A confirmation window will appear; click **Yes** to confirm.
7. Click one or more **checkboxes** to the far left.
8. Click the **Selected Gear** in the top left and choose one of the following:
 - a. **Success Plan Report(s)**: This will generate a PDF version of all selected plans.
 - b. **Reassign Responsible Educator (Plan Manager only)**: Here, you can select a new responsible educator for all selected plans.
 - i. Click the **checkbox** to the left.