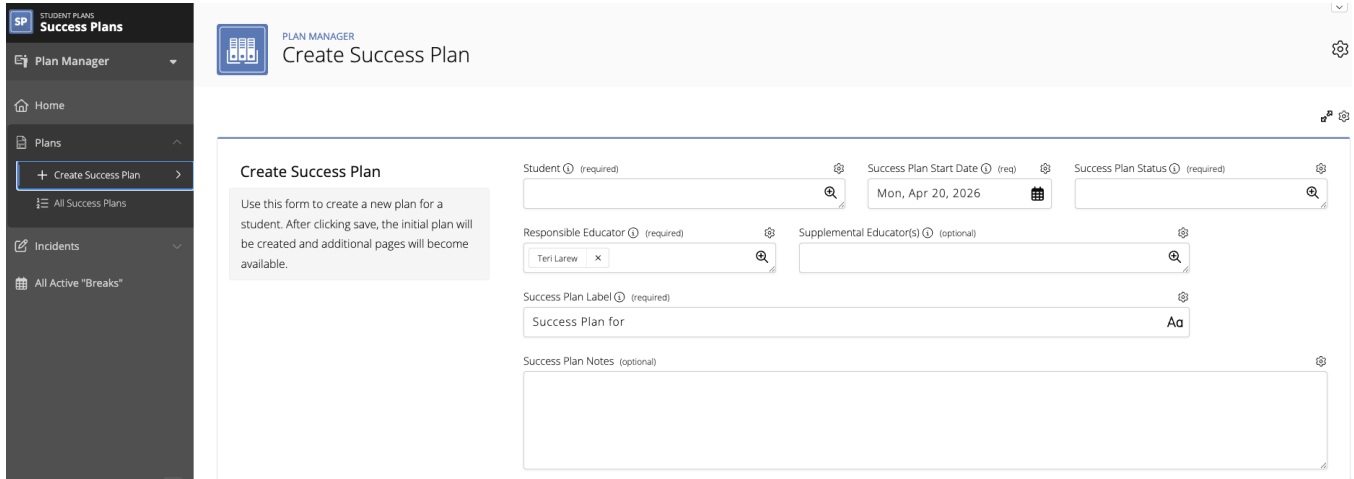


Create a Success Plan (Connect)

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. On the left is a navigation menu with 'Success Plans' selected and 'Create Success Plan' highlighted. The main form area has a title 'Create Success Plan' and a brief instruction: 'Use this form to create a new plan for a student. After clicking save, the initial plan will be created and additional pages will become available.' The form fields are:

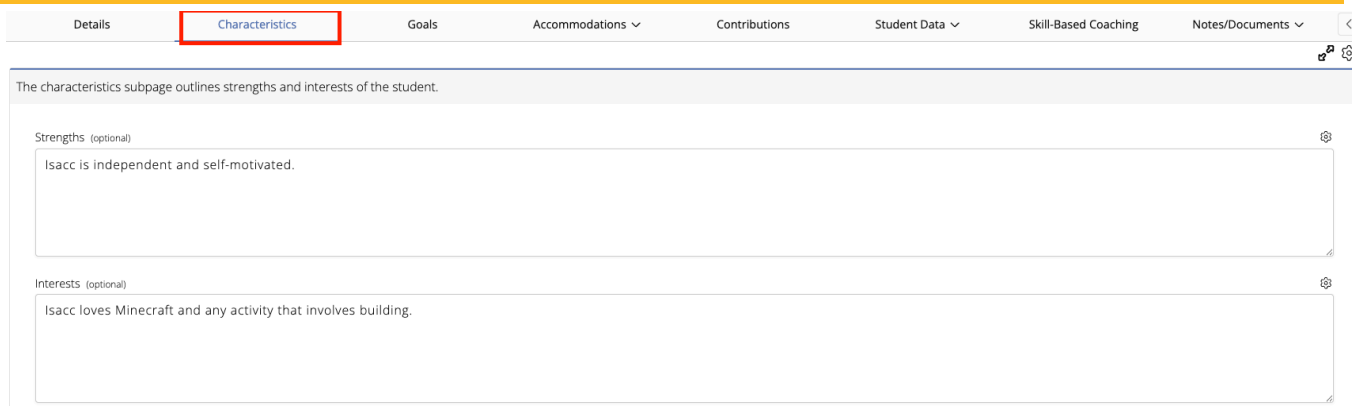
- Student** (required): A search field with a magnifying glass icon and a checkbox to the left.
- Success Plan Start Date** (required): A date picker showing 'Mon, Apr 20, 2026'.
- Success Plan Status** (required): A dropdown menu with a magnifying glass icon and a checkbox to the left.
- Responsible Educator** (required): A search field with 'Teri Larew' selected and a magnifying glass icon.
- 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 (Aa).
- 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)

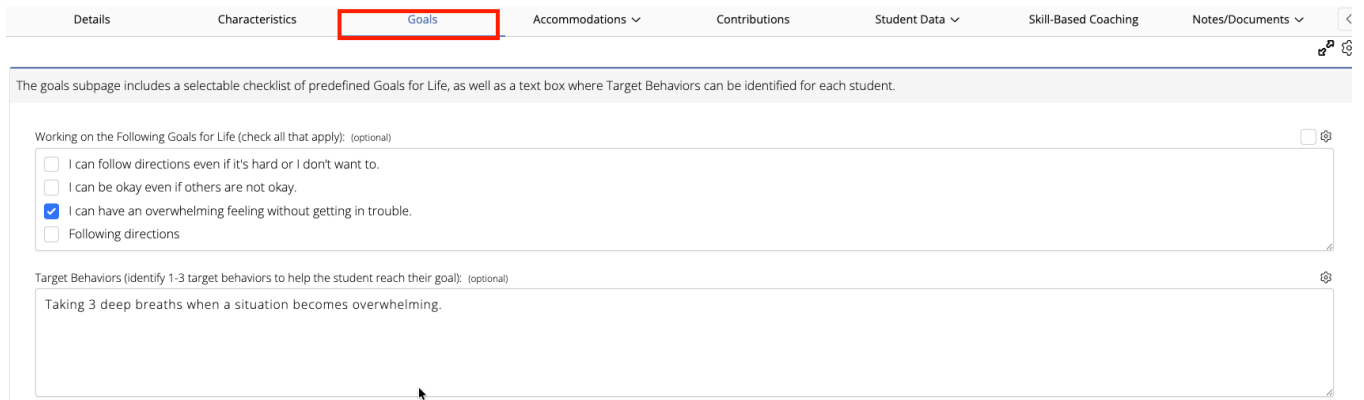
Isacc loves Minecraft and any activity that involves building.

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)

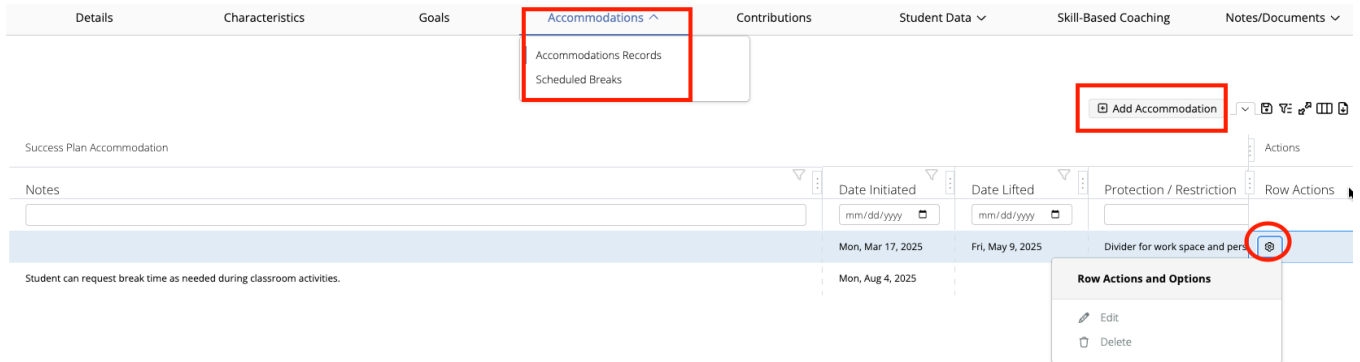
Taking 3 deep breaths when a situation becomes overwhelming.

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 schedule 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:



The screenshot shows the 'Accommodations' tab interface. At the top, there are navigation tabs: Details, Characteristics, Goals, Accommodations (selected), Contributions, Student Data, Skill-Based Coaching, and Notes/Documents. A dropdown menu is open under 'Accommodations', showing 'Accommodations Records' and 'Scheduled Breaks'. To the right, there is an 'Add Accommodation' button. Below this, there is a table with columns: Notes, Date Initiated, Date Lifted, Protection / Restriction, and Row Actions. A row is highlighted with a blue background, and a 'Row Actions and Options' menu is open, showing 'Edit' and 'Delete' options. The table contains one row with the following data: Notes: 'Student can request break time as needed during classroom activities.', Date Initiated: 'Mon, Mar 17, 2025', Date Lifted: 'Fri, May 9, 2025', Protection / Restriction: 'Divider for work space and pers...', and Row Actions: a gear icon.

- 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:** 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 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 |
|---------|-----------------|-------|----------------|---------------|--------------|----------------------|-----------------|

The Contributions page outlines both the student's Job Contributions as well as an area to outline staff contributions during crisis management.

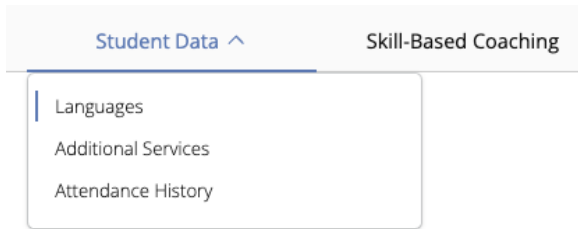
| |
|---|
| Student's Job Contribution (optional) |
| Student will be the line leader each week when leaving the classroom for Library and Music. |
| Crisis Management (optional) |
| n/a at this time |

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.

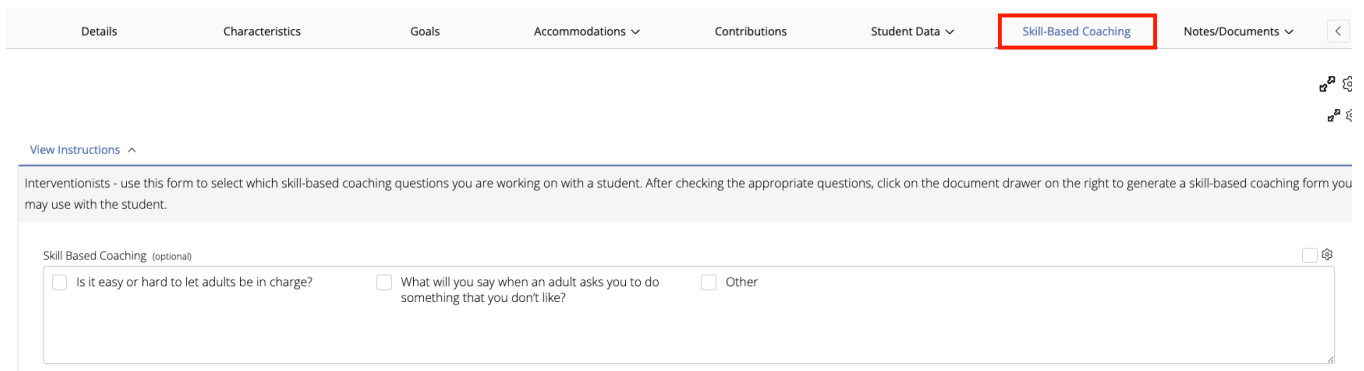


2. Click the **Student Data** tab at the top of the page and choose one of the following options from the dropdown menu:
 - a. **Languages:** Here, you can view the students' home, native, and family preferred languages.
 - b. **Additional Services:** View the student's program and service enrollments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

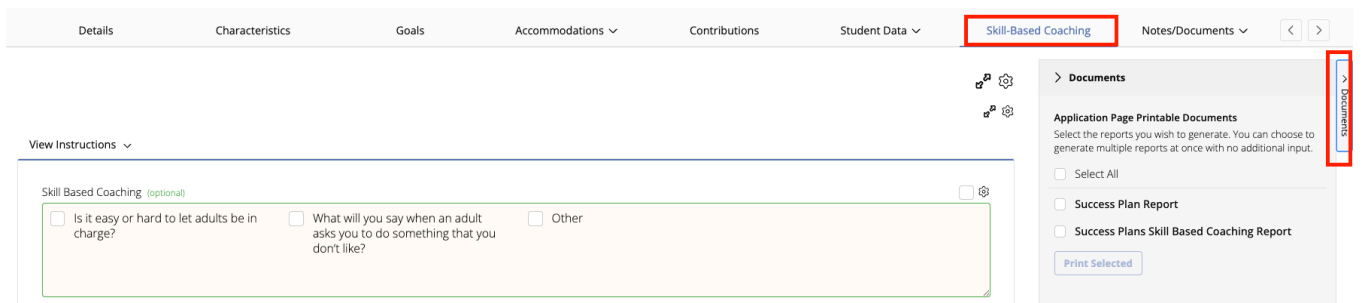
Skill-Based Coaching Tab

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.

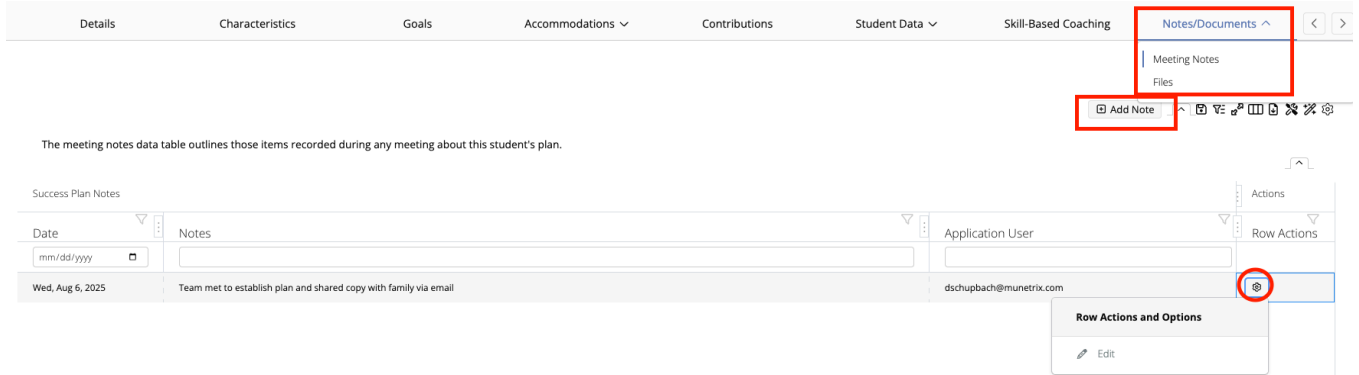


- a. Click the **checkbox** to the left of one of the selections under the **Application Page Printable Documents**:


- 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 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.

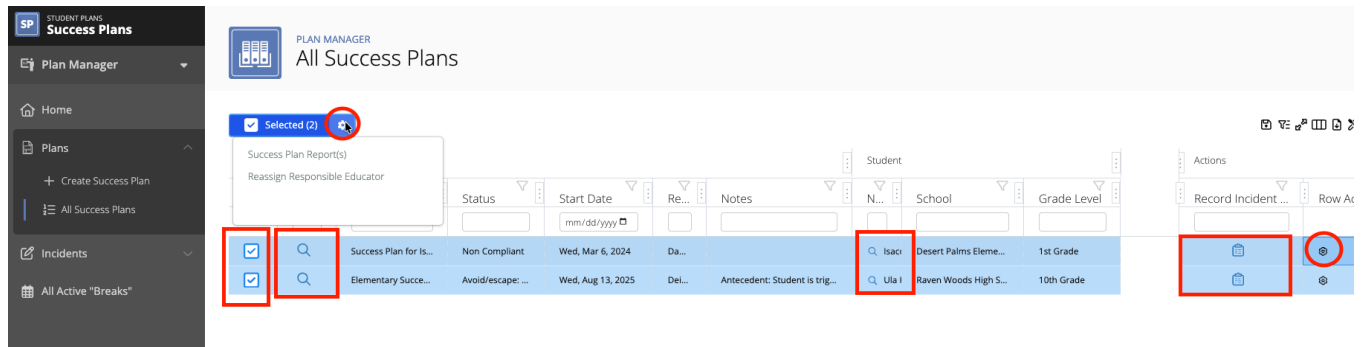
| Date | Notes | Application User | Row Actions |
|------------------|--|-------------------------|---|
| Wed, Aug 6, 2025 | Team met to establish plan and shared copy with family via email | dschupbach@munetrix.com |  |

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:** Add meeting notes here.
 - 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:** Add files to the plan here.
 - 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 type="text"/> |  |
| | | <input type="text"/> |  |
| | Notes (optional) | <input type="text"/> |  |

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.