EXCEED® RTI
Creating an Individual Plan

Naming Convention: Teacher's Last Name – Tier – Reading/Math – Area of Concern

Example: Smith – T2 – Reading - Phonics

Description	Action
Intervention plans are associated with students, so the first step is to select a student's name from your student list. **Key Point:** *Remember to follow the RTI process:* • *Identify the Student* • *Diagnose using District Diagnostic Guidelines* • *Chose a goal(s) based on the Diagnostics* • *Identify the Progress Monitoring Tool and get a Baseline* • *Identify what Interventions will help you reach the goal*	• Go to your Student List • Click on a student name • Click the (Student Options) icon • Select **Add Plan** from the dropdown menu
The **Plan Details** tab displays. Start by selecting a domain from the Domains panel. A student can only have one **Individual** intervention plan per domain. **Key Point:** *Each plan can have multiple goals and objectives, but once a domain name is in use it no longer appears on the domain list for that student.*	• Select a Domain from the Domains Panel
The **Intervention Plan Details** panel becomes active. This is where you name the plan and enter tier and duration details. Required fields are indicated by a red asterisk * **Key Point:** *It's important to give the Plan a name that identifies the plan, and that other educators will recognize and understand. Use the district naming convention.*	• Enter a Plan Name • Select a Tier within the domain from the dropdown • Select the Language • Click the Calendar icon and select a Start Date – this date reflect the date of the first Progress Monitoring, not the start of the Intervention • Enter the duration of the Plan in weeks • Click the icon to assign the Plan to yourself…. ○ or – select the edit icon to select a staff member • Enter any Plan Notes in the text box (optional) • Click **Save Plan**

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The **Plan** screen displays with the **Select Goals** tab displayed. Here you'll select a goal from the **RTI Goal Bank**, identify the grade level, and select an area of concern. The goals available in the goal bank are determined by the district. **Key Point:** *You can select more than one Area of Concern by holding down the CTRL key.*	• Click the **Goal Bank** dropdown and select a goal from the list • Click the **Grade Level** dropdown and select a grade level from the list • Select an **Area of Concern**
The Search results panel displays a list of goals related to the area of concern. Once again, these goals are determined by the district. Notice that once you select goals, they display in the Selected Goals panel on the right side of the window.	• Click a check box beside the goal you want to add to the plan. • Click **Add Selected Goals**
The screen automatically displays with the **Plan Goals** tab selected. The Plan Goals you selected on the Select Goals tab is displayed in the Plan Goals panel. The beside the goals in the Plan Goals panel indicates that progress monitoring has not been set up yet.	• Click on a goal you added on the previous screen
The panel on the right is where you customize the plan goals for a student. The fields on this screen change based on the goal selected. The top portion of the panel generates a description of target metrics.	• Complete the fields beside the text description • The Measure that appears has been determined by the district to be the best option
The last two areas of the panel are to set baseline and target metrics, and to activate progress monitoring if desired. The M beside the goals in the Plan Goals panel indicates that progress monitoring is Active.	• Click the **Active** button to activate plan monitoring • Select the frequency of monitoring from the **Frequency** dropdown • Click on the day(s) to monitor • Notice the box for Allow System to Schedule is checked - uncheck the box unless you will be using the Progress Monitoring Dashboard to enter scores • Enter a baseline and target measurement for the plan • Click **Save Goal**

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The window doesn't automatically go to the next tab because there may be additional Goals that need to be completed. Move on to the next tab when all goals are M .	• Click on the **Interventions** tab
The **Interventions** tab displays with Intervention Selector, Selected Interventions, and Intervention Details panels. Once you select Add Intervention, you must specify if the intervention is from the district Bank or Custom. **Key Point:** *Bank interventions are Interventions seen across the District, while Custom interventions allow you to develop your own interventions. If you chose a Custom intervention make sure the Intervention Name is stranger friendly, be specific.*	• Click the **Add Intervention** button • Select a strategy type (Bank or Custom) • Click the **Intervention Type** dropdown and select a type • Select an **Area of Concern** • Select an **Intervention**
Once you select an intervention, the **Intervention Details** panel displays. This is where you specify when intervention logging will occur.	• Click the calendar icon to change the start date for the intervention – this date represents the baseline for the progress monitoring which may or may not represent the start date of the intervention • Click the time icon to set the time for the intervention • Enter the minutes the intervention will be conducted • Click the Frequency dropdown and select a frequency • Click on the days the student will be attending the intervention • Notice the box for Allow System to Schedule is checked - **uncheck** the box unless you will be using the Notifications Dashboard • DO NOT CLICK any of the **Log Intervention** buttons • Click on the **Save Intervention** button
Click the Summary tab and review the plan for correct dates, goal(s) and intervention(s). Print this page for parent documentation.	