

# MTSS Panorama Guide

## Purpose

This handbook establishes district-wide consistency for how Panorama is used to document student supports, interventions, and services. This document provides of overview of:

- How Panorama supports MTSS/EST decision-making
- Who enters information
- What information is entered
- What strategies and interventions should documented

Consistent use of Panorama ensures clear communication across staff, consistent documentation of student supports, improved decision making, stronger transitions between grades, and districtwide alignment.

## MTSS in CSD

MTSS is a well defined system that aligns assessment, intervention and instruction to improve learning for all students. Please see our CSD MTSS Guide for more detailed information.

CSD Guiding Principles:

- **All Students** can learn.
- **Primary/Universal Instruction** includes support and targeted instruction for all learners .
- A **balanced assessment system** informs teaching and learning.
- **Collaboration and collaborative planning** builds positive relationships with students, community, caregivers and educators.
- **Thoughtful use of support and expertise** that is responsive, ongoing and monitored meets student needs.
- **Professional learning** that addresses the needs of school and is driven by teacher input, improves student learning.
- **Data informed instruction and decision making** that is timely, ongoing and balanced, improves outcomes for students.
- **Equity** that is culturally responsive, meets student needs, and includes student voice is a critical aspect of learning.

| ROLES & RESPONSIBILITIES                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
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| <p>All staff are responsible for keeping information current and accurate. Staff will:</p> <ul style="list-style-type: none"><li>• Enter information in a timely manner</li><li>• Review interventions prior to EST meetings</li><li>• Update progress monitoring regularly</li><li>• Close interventions when complete</li><li>• Use Panorama during problem-solving meetings</li><li>• Maintain districtwide consistency</li><li>• Follow confidentiality guidelines</li></ul> |

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| <p><b>Administrator</b></p> <p>Administrators oversee and ensure systems for interventions that include:</p> <ul style="list-style-type: none"> <li>• Testing and evaluation results</li> <li>• Observations and recommendations</li> <li>• Referrals</li> <li>• Interventions</li> <li>• Goals</li> <li>• Timeline</li> <li>• Progress monitoring</li> <li>• Review date</li> </ul>                 | <p><b>EST Member</b></p> <p>EST Team Members are responsible for entering and monitoring:</p> <ul style="list-style-type: none"> <li>• Testing and screening evaluation results</li> <li>• EST recommendations</li> <li>• Intervention/s</li> <li>• Intervention planning notes</li> <li>• Implementation and progress toward goals</li> <li>• Timelines</li> </ul> | <p><b>Classroom Teacher</b></p> <p>Classroom teachers are responsible for documenting:</p> <ul style="list-style-type: none"> <li>• Targeted classroom-based academic/behavior intervention (beyond daily practice, based on student need, information that would be shared for student success)</li> <li>• Student success information</li> <li>• Intervention participation</li> <li>• Collaboration information</li> </ul> |
| <p><b>Special Educator</b></p> <p>Special educators are responsible for documenting:</p> <ul style="list-style-type: none"> <li>• Program information</li> <li>• Interventions</li> <li>• Collaboration</li> </ul> <p>Information in Panorama is a summary of key information related to Intervention that is being progress monitored; Full IEP and related information is maintained in EdDoc.</p> | <p><b>Interventionist</b></p> <p>Interventionists are responsible for documenting:</p> <ul style="list-style-type: none"> <li>• Services</li> <li>• Intervention information - skill focus, group size, frequency, progress monitoring, exit criteria</li> <li>• Monitoring progress of intervention</li> <li>• Updating Intervention Plan</li> </ul>               | <p><b>Behavior Specialist/Clinician</b></p> <p>Behavior Specials/Clinicians are responsible for documenting:</p> <ul style="list-style-type: none"> <li>• Caseload</li> <li>• Groups</li> <li>• Interventions (ex. Behavior intervention plans, CICO plans)</li> <li>• Strategies (ex. Regulation supports, counseling supports)</li> </ul>                                                                                   |

| WHAT TO ENTER                |                                                                 |                                                                                                                                                                                                                                                                                                                                                            |
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|                              | Definition                                                      | Additional Information                                                                                                                                                                                                                                                                                                                                     |
| <b>Screening Information</b> | Academic/social-emotional (SEL) screening & assessment results: | <p>Examples</p> <ul style="list-style-type: none"> <li>• Literacy assessments</li> <li>• STAR assessments</li> <li>• DESSA assessment</li> <li>• CELF assessment</li> <li>• Math unit tests</li> <li>• Functional Behavior Assessment (FBA)</li> <li>• Articulation/speech testing</li> <li>• Additional/follow-up/secondary assessment testing</li> </ul> |

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| <b>Strategies</b>    | <p><b>A strategy</b> is a targeted action or support designed to improve an outcome. <b>If a support does not include progress monitoring, it should be documented as a strategy.</b></p> <p>These following should documented as Strategies, unless goals and progress monitoring is included:</p> <ul style="list-style-type: none"> <li>• Regulation breaks</li> <li>• Nurse visits</li> <li>• Visual Supports</li> <li>• Organizational Support</li> <li>• Transitions supports</li> <li>• Classroom accommodations</li> <li>• Environmental accommodations</li> </ul> | <p><b>Examples</b></p> <ul style="list-style-type: none"> <li>• Graphic organizers</li> <li>• Visual schedule</li> <li>• Extra breaks</li> <li>• Flexible seating</li> <li>• Preferential seating</li> <li>• Teacher Check-ins</li> <li>• General accommodations</li> <li>• Informal supports</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <b>Interventions</b> | <p><b>An intervention is:</b></p> <ul style="list-style-type: none"> <li>• A targeted support with a clearly defined goal</li> <li>• A defined timeline</li> <li>• Progress monitoring</li> <li>• A designated staff member responsible for implementation</li> </ul> <p>The following should be documented as Interventions that include goals and progress monitoring:</p> <ul style="list-style-type: none"> <li>• Academic Interventions</li> <li>• Behavior Interventions</li> <li>• SEL Interventions</li> <li>• Attendance Intervention</li> </ul>                  | <p><b>Examples</b></p> <p>Academic Interventions</p> <ul style="list-style-type: none"> <li>• Title I/Reading/Math service</li> <li>• Strategic Math class/service</li> <li>• Strategic Literacy class/service</li> <li>• Academic pull-out service</li> </ul> <p>Behavior Interventions</p> <ul style="list-style-type: none"> <li>• Check-In/Check-Out (CICO)</li> <li>• Behavior/Regulation intervention plan</li> <li>• Individual behavior intervention</li> </ul> <p>SEL Interventions</p> <ul style="list-style-type: none"> <li>• SEL group</li> <li>• School Counseling group</li> <li>• Social Skill group</li> </ul> <p>Attendance Intervention</p> <ul style="list-style-type: none"> <li>• Group attendance intervention</li> <li>• Individual attendance intervention</li> <li>• Trusted Adult Model</li> </ul> |
| <b>Support Notes</b> | <p><b>Support Notes provide brief documentation</b> that guides staff to relevant information elsewhere in Panorama. They are not intended to replace Intervention Plans or uploaded documents. Support Notes should guide readers elsewhere, not contain all details.</p> <p><b>Support notes should be:</b></p> <ul style="list-style-type: none"> <li>• Be brief</li> </ul>                                                                                                                                                                                             | <p><b>What to Write in Support Notes</b></p> <ul style="list-style-type: none"> <li>• Brief summary of concerns</li> <li>• Documentation of meeting</li> <li>• Type of meeting (ex. Parent meeting, EST meeting, police department meeting) and date</li> <li>• Referral notes including date of referral, reason, brief decision summary</li> <li>• Timeline for review</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                           |

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|                           | <ul style="list-style-type: none"> <li>• Be factual</li> <li>• Avoid sensitive clinical details</li> <li>• Avoid speculations</li> <li>• Avoid subjective language</li> <li>• Be action-oriented</li> <li>• Follow confidentiality guidelines</li> </ul> <p><b>When to Use Support Notes:</b></p> <ul style="list-style-type: none"> <li>• Documentation of meetings</li> <li>• Parent communication</li> <li>• EST meetings</li> <li>• Police department meetings</li> <li>• External agency meetings</li> <li>• Documents when a referral occurs</li> <li>• Recording decision-making</li> <li>• Setting review timelines</li> <li>• Brief updates between meetings</li> </ul> | <ul style="list-style-type: none"> <li>• Direction to Intervention Plan (if applicable)</li> </ul> <p><b>Additional information to include, when applicable:</b></p> <ul style="list-style-type: none"> <li>• Referral to specialists</li> <li>• Academic supports/services</li> <li>• SEL/behavioral supports</li> <li>• Attendance supports</li> </ul> <p><b>Example</b></p> <p>Parent meeting held 3/26/26 to discuss attendance concerns. Referral made to School Engagement Clinical. The team will review progress in 4 weeks. See Intervention Plan for attendance support.</p> <p><b>What NOT to Write in Support Notes</b></p> <ul style="list-style-type: none"> <li>• Detailed intervention descriptions</li> <li>• Long narrative summaries</li> <li>• Sensitive, confidential information</li> <li>• Therapy notes</li> <li>• Evaluation results</li> <li>• Progress monitoring data</li> <li>• Duplicated information already in Panorama</li> </ul> |
| <b>Intervention Plans</b> | <p><b>Intervention Plans document formal supports</b> that include goals, timelines, and progress monitoring. Use Intervention Plans for structured supports that are actively monitored.</p> <p><b>When to use Intervention Plans</b></p> <p>Use Intervention Plans when:</p> <ul style="list-style-type: none"> <li>• Creating a formal intervention</li> <li>• Documenting Academic, Behavior, Attendance, SEL Intervention Plans</li> <li>• Monitoring ongoing supports requiring progress monitoring</li> <li>• Regularly entering Support Notes</li> </ul>                                                                                                                 | <p><b>What to Write in Intervention Plans</b></p> <ul style="list-style-type: none"> <li>• Area of concern</li> <li>• Measurable goal</li> <li>• Intervention description</li> <li>• Person responsible</li> <li>• Frequency</li> <li>• Start date</li> <li>• Review date</li> <li>• Progress monitoring method &amp; updates</li> </ul> <p><b>What NOT to Write in Intervention Plans</b></p> <ul style="list-style-type: none"> <li>• Meeting summaries</li> <li>• Referral documentations</li> <li>• Long narrative history</li> <li>• Confidential therapy notes</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                    |

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|                   |                                                                                                                                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>• Evaluation reports</li> <li>• Informal notes</li> </ul> <p><b>Creating an Intervention Plan</b></p> <ol style="list-style-type: none"> <li>1. Identify area of need</li> <li>2. Create measurable goal</li> <li>3. Define intervention</li> <li>4. Assign responsible staff</li> <li>5. Set review timeline</li> <li>6. Determine progress monitoring method</li> <li>7. Monitor and update regularly</li> </ol> <p><b>Review Timeline</b></p> <ul style="list-style-type: none"> <li>• Layer 2 - Every 4-6 weeks</li> <li>• Layer 3 - Every 2-4 weeks</li> <li>• During EST meetings</li> <li>• During student transitions</li> </ul> |
| <b>Checkboxes</b> | <b>Checkboxes provide quick visibility of supports</b> being provided to a student. They should align with Strategies and Interventions documented elsewhere. Checkboxes DO NOT replace Intervention documentation.                                                                                                                                                                                                              | Select appropriate options from dropdown menus in Intervention Plans                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <b>Documents</b>  | <p><b>Documents provide support information</b> referenced in Support Notes, Intervention Plans and Checkboxes</p> <p><b>When to Use Documents</b><br/>Use documents when:</p> <ul style="list-style-type: none"> <li>• Uploading formal reports</li> <li>• Uploading intervention plans</li> <li>• Sharing evaluation results</li> <li>• Storing meeting summaries</li> <li>• Uploading outside agency documentation</li> </ul> | <p><b>What to Include/Upload</b></p> <ul style="list-style-type: none"> <li>• Evaluation reports</li> <li>• FBA reports</li> <li>• Speech reports</li> <li>• OT reports</li> <li>• Psychological reports</li> <li>• Behavior plans</li> <li>• Meeting summaries (formal)</li> <li>• External provider documentation</li> </ul> <p><b>What NOT to Include/Upload</b></p> <ul style="list-style-type: none"> <li>• Informal notes</li> <li>• Duplicate documents</li> <li>• Draft documents</li> <li>• Emails (unless necessary)</li> <li>• Confidential therapy session notes</li> </ul>                                                                                         |