

# Workgroup #1: Workflow, Improvements, and Training Advisory Group

Washington 3.0

*October 9, 2026*



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CONSULTING GROUP

**Solutions that Matter**

# Agenda

Updates From Last Week

Items for Discussion

- Post-secondary Goals Update

- Custom Modifications and Accommodations

- Test Accommodations

- Review Data Migration Scenarios

Next Steps



# District Advisory Groups

## 1. Workflow, Improvements, and Training

**Purpose:** Ensure 3.0 supports effective day-to-day district practice and that users have the tools, guidance, and training needed for successful use.

**Focus:** This group will identify workflow barriers, recommend functional or process improvements, and help shape training and support resources based on real district use cases. It will help distinguish between system issues, workflow changes, and training needs so the right response can be developed.

## 2. Reporting and Compliance

- **Purpose:** Ensure 3.0 supports accurate, timely, and compliant special education reporting for districts and the state.

**Focus:** This group will review reporting workflows, data requirements, validation practices, writeback and integration needs, and compliance-related use cases. It will help identify risks, clarify requirements, and prioritize improvements to strengthen data accuracy and the district's confidence in meeting state and federal obligations.

## 3. User Permissions and Roles

**Purpose:** Ensure user roles and permissions appropriately balance access, security, efficiency, and the practical responsibilities of district staff.

**Focus:** This group will examine how different users need to access, create, review, approve, and manage information within 3.0. It will identify permission barriers or gaps, recommend clearer role definitions and configurations, and help ensure access models reflect actual district responsibilities while protecting sensitive student information.



# Updates From Last Week

## October 2 Meeting Updates:

- **Workflow improvements:** Consent and the IEP meeting date timeline items are with development. Adding a type-in service search field to long drop-down lists (SDI, SAS, RS) are underway.
- **IEP Services Description:** The field is active at all sites.
- **Contact Log:** Members supported easier filtering. PCG confirmed only the calendar-year default is available within this current configuration.
- **Referral recommendations:** Members requested evaluation, 504 referral, and no-further-action options, removal of the SIT reference.
- **IEP modifications:** Members supported custom text but ranked it below broader workflow concerns.
- **Additional Items:** PCG will review tickets and clarify resolution timelines. Spell-check, testing accommodations, and service matrices also need follow-up.



# Post-secondary Goals Update

**Topic:** 2.0 Transition Goal Data & Migration to 3.0

**Issue:** Users encounter an error on the IEP Goals page for students with secondary transition data. The error is specific to transition goals that were migrated from 2.0 IEPs.

**Background:** The way the transition goals for secondary students were migrated from 2.0 to 3.0, the data all pulls into the same background goals table as the annual IEP goals. Since the migrated transition goals are in the database, the system is flagging those goals as needing the same information, like performance levels, as the annual IEP goals. The error message displays on the IEP Goals page like the picture below.

- Goals Tab - All Goals must have a Report Interval
- Goals Tab - For every goal, a Goal Progress Reporting option must be selected
- Goals Tab - "Upon leaving public school" - By date is required.
- Goals Tab - "Upon leaving public school" - A valid Present Level must be selected.

**Resolution:** Clear the transition goals from the migrated goals table – access to the goals table will be enabled by Tuesday (10/13)

# Custom Modifications and Supports for School Personnel

**Topic:** IEP Accommodations - Custom Accommodations

**Issue:** Users need to ability to enter custom supports for students on the IEP Accommodations page.

**Background:** Users can enter a custom classroom accommodation today in the system but are limited to drop-down selections for modifications and supports for school personnel.

**Resolution In Process:** Add 'type-in' fields to the modification selections. Our proposed solution is not to remove current functionality but improve it with added fields for users to type custom supports for students.

***Are custom fields needed for both Modifications and Supports for School Personnel sections of the IEP Accommodations page?***

# IEP Test Accommodations

**Topic:** IEP Accommodations – Changes to Testing Accommodations

**Issue:** Districts have reported we are missing test accommodations that should be in the list.

**Background:** We utilized the [2026-27 Guidelines on Tools, Supports, and Accommodations](#) to create the current list in the system. It has been reported to us that we are missing WIDA Alt. Assessment items, for example, but those are not included in those guidelines.

**Resolution:** Today, we want to start this conversation and seek assistance with additional guidance materials we might have missed when aligning the list to the state allowable testing guidelines.

# Review Data Migration Scenarios

## **Topic:** 2.0 Data Migrated to 3.0 Created Challenges

**Issue:** We have encountered challenges with the migrated data from 2.0 to 3.0. In some cases, like the post-secondary transition goals, the pathway forward is to delete the data. In other cases, like the Assessment Revision>Deliberations page, there is data needing to be entered. These challenges are present during our implementation year but will not follow in subsequent years.

**What's Next:** Our commitment is to provide clear, concise, actionable guidance to best support district users and teams creating documentation and interacting with the migrated data.

*What specific guidance would help users and teams take the next steps when encountering issues with migrated data?*

# Next Meeting: Friday, October 16

- Friday October 16, 2026 | 10 – 11 AM PST
- Topics:
  - Progress Reports
  - Course of Study/Post-secondary updates
  - Locking/unlocking document process and level 1 access
  - Testing accommodations
  - Workload issue of migration data (how do we address, etc.)
  - Transfer evals, IEPs, and IDTs





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