

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

Washington 3.0

October 2, 2026



PUBLIC[™]
CONSULTING GROUP

Solutions that Matter

Agenda

Updates From Last Week

Items for Discussion

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

Workflow Changes In Process:

- Applied feedback from this group in creating a specification for development changing how consent is obtained and recorded for a Reevaluation or Assessment Revision.
- Began development work to create a separate event to track IEP Meeting begin and end dates separate from the IEP begin and end dates.
- Adding a type-in quick search to the SDI, Related, and Supplementary Aids and Services lists. This feature will reduce scrolling and allow for quicker selection from the lists.



Updates From Last Week

Workflow Changes Completed:

- Added the IEP Services Description
 - Configurable – can be active or inactive for individual sites
 - Currently active for all sites ~ if you would like this turned off, please submit a Zendesk ticket

▼ Description of Services

Description of Services

Here is the description of services

Services -

Concurrent	Service(s)	Service Provider for Delivering Service	Monitor	Frequency	Location (setting)	Start Date	End Date
------------	------------	---	---------	-----------	--------------------	------------	----------

Total minutes per week of building instructional time available for this student (excluding lunch):

1800 minutes per week

Total minutes per week student is served in a special education setting:

0 minutes per week

Percent of time in general education setting:

100.00% in General Education Setting

Description of Services:

Here is the description of services

Contact Log

Topic: Add a filter to the Contact Log for easier navigation and view of multi-year contact attempts.

- The 'year' is defined as a calendar year (Jan – Dec).
- Multi-select option to include multiple years or a single year.
- Use the Contact Date header to further organize in ascending/descending order.
- Default is the current year.

Contacts

PRINT CONTACTSEXPORT CONTACTSADD A CONTACT

Filter Contacts by Year

☒ 2026☐ 2025

Del	Contact Domain	Contacting Person	Person Contacted	Contact Method	Contact Date	Contact Result	Document	Details
☐	Referral	Emi Training	Parent Sandbox	Letter	06/09/2026	Can Attend		
☐	504 Plan	EmiAdmin Account	Parent Sandbox	Letter	09/01/2026			
☐	IEP Notification	Jasmine Russell	Parent Sandbox	Letter	09/01/2026	Cannot Attend - Permission to Proceed with a Meeting		

SAVE

Referral to Evaluation Changes for Discussion

Topic: Discuss the IDEA and 504 Referral Decision options, verifying workflow and identifying any proposed changes.

Why: Districts have asked us to reduce the referral options and streamline.

Benefit: Simplifies the workflow and reduces confusion by limiting Referral Recommendations to:

- Refer to Evaluation Group (replaces the current 3 options for 'Refer')
- No Further Action Needed

▼ Decision

Recommendation	Responsible for Parent Notification	Responsible for Requesting Source Notification
Refer to Special Education		
Refer to 504		
Refer to SIT		
No Further Action Needed		

SAVE



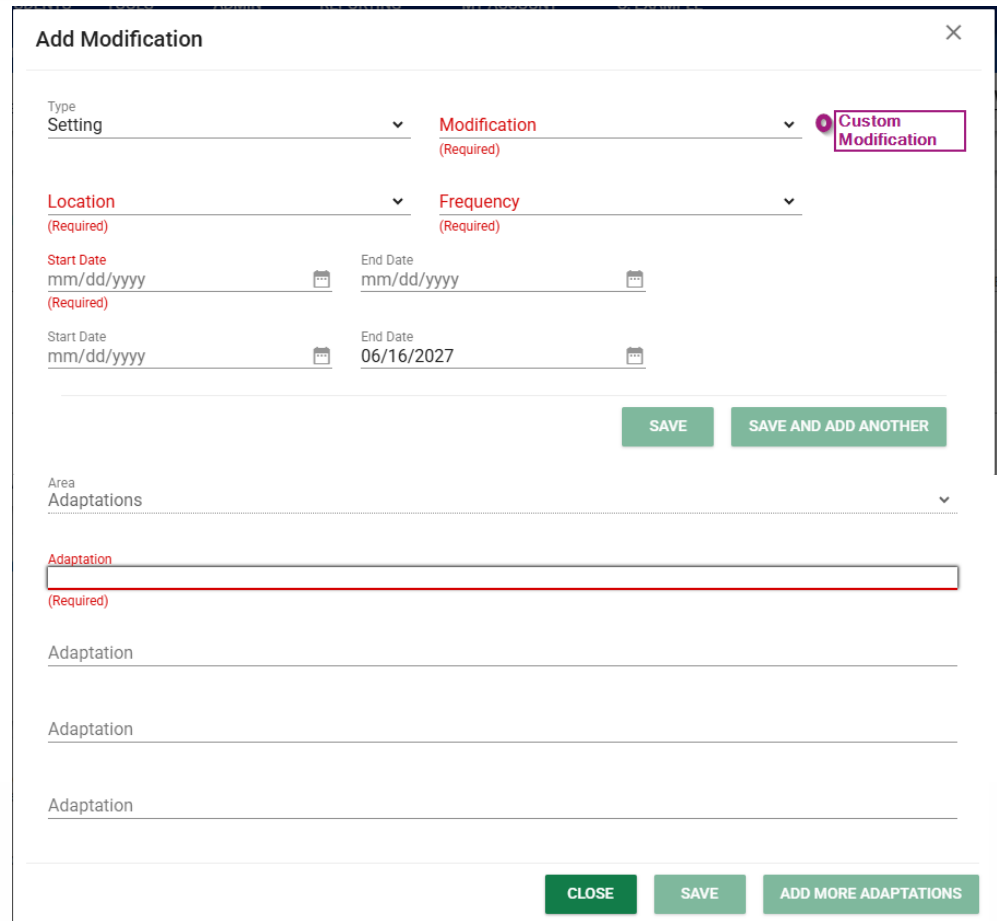
IEP Modifications Change for Discussion

Proposal: Add an option to enter custom modifications in the IEP process.

Why: Modifications vary by district (curriculum, grading, course-level or altered content)

Benefit: Provides a hybrid solution – keeping the drop-down for general or common modifications and providing a free-text custom entry.

Consideration: Reporting limitations – would districts want to report on this data?



The screenshot shows a web-based form titled "Add Modification" with a close button (X) in the top right corner. The form is organized into several sections:

- Type Setting:** A dropdown menu.
- Modification (Required):** A text input field with a red border. A purple callout bubble with a question mark icon points to this field, containing the text "Custom Modification".
- Location (Required):** A dropdown menu.
- Frequency (Required):** A dropdown menu.
- Start Date (Required):** A date input field with a calendar icon, showing "mm/dd/yyyy".
- End Date:** A date input field with a calendar icon, showing "mm/dd/yyyy".
- Start Date:** A date input field with a calendar icon, showing "mm/dd/yyyy".
- End Date:** A date input field with a calendar icon, showing "06/16/2027".

Below these fields are two green buttons: "SAVE" and "SAVE AND ADD ANOTHER".

Below the buttons is a section titled "Area Adaptations" with a dropdown menu. Under this section are three text input fields, each labeled "Adaptation (Required)" in red text. The first field is empty, and the other two contain the word "Adaptation".

At the bottom of the form are three green buttons: "CLOSE", "SAVE", and "ADD MORE ADAPTATIONS".



PCG Team Members

Mike Howard, Manager

Kris Gregoire, Consultant

Sarah Shepherd, Manager, Business Implementation

Dr. Jennifer Meller, Manager

Heather Hayes, Associate Manager

Dr. Steve LaBounty, Sr. Education Advisor

[Contact: MikeHoward@pcgus.com](mailto:MikeHoward@pcgus.com)



Next Meeting: Friday, October 9

- Friday October 9, 2026 | 10 – 11 AM PST
- Topics:
 - More to come
 - Also, bring your district's examples and questions!
- Materials to follow





PUBLICTM
CONSULTING GROUP

Solutions that Matter