

Compliance _ Reporting Advisory Group-20260923_150250-Meeting Transcript

September 23, 2026, 8:02PM

58m 0s

● **LaBounty, Steven** started transcription



Meller, Jennifer 0:15

And I think at least for me, I'm a pretty visual person. So I think helping to have that as a backdrop is always a support. So we, I think you know most of us on the PCG side, we are joined by Steven LaBounty, who is going to be supporting on the facilitation piece along with myself and then helping to capture all of our notes. So one big difference you will see after this call is that we will send a summary of, well, we'll send this PowerPoint so you have it, and then we'll send a summary of decisions made that will then be forwarded on to be conveyed in the Friday newsletter that comes out. So we're going to close the loop on that so that you're clear on summarization of the conversation. We're clear on next steps and you have the information if you'd want to share it out further. So with that, why don't we go ahead and jump in? As with our last session, feel free to stop or, you know, ask questions or put questions in the chat because we want to make sure that we're not moving too fast and that we're really responsive to what it is that we're sharing and that we're making those clear connections. I sent out in the agenda just a few high level bullet points. So we wanted to open it again for conversation. If there are any immediate talking points that you want to share with us or things like I said earlier, you want to make sure we cover for today. We have quite a few updates that we want to share with you specific to the lists and some piece of information that we think could be helpful for you as you think through both short term and long term when it comes to that, the ask and the decision point we had made last week. We want to talk through some of the short term resolution and plans on some things underway that we think are helpful, but also we want to kind of lay the groundwork for longer term that we would love your input on some of those pieces. as well. And then any open discussion and next steps will summarize at the end. I did just see a question come through in chat. It was a question as to where the

notes will be housed. So we will send these to you via e-mail. So the summary of the notes from today, along with the PowerPoint, and then the summary of those. So the decisions that are made, the discussion that we've had.

will be provided, it will be provided broadly to all stakeholders that receive the Friday newsletters. So I know there are a couple of different versions that happen depending on different user types, but at least that's my understanding. So that's where that information,

Summary that will be housed.

I know some of you asked for a summary of who's in this group. We did send out the spreadsheet that has the participants listed, but we just put it in here as well. So you have that information and you kind of know who's involved in this.

There are some folks that have continued to reach out or folks that have come to meetings that we didn't have on our original list. That's totally fine. If folks want to commit the time and be a part of it, we're welcoming them in. So if you don't see your name or organization listed, either reach out to us separately or

Um, uh, put that information in the chat.

and we'll make sure to add you all in there.

And just for frame of reference, I think there was an did we skip over the PCG slide?

Maybe it was after that, but we did also provide our information in that as well. Yep, thanks, Mike. So our information and who we are and who's part of this group is listed here. One piece that is new information that we didn't have

last week to share is that we have one e-mail address, so mike.howard@pcgus.com, that is then funneled. It's kind of, it's the incoming inbox for us. So you can feel free to e-mail that e-mail address and then it gets farmed out. So there are multiple ways to get in touch with us, but we wanted to provide that as a resource as well.

I want to just quickly set the stage for these work groups a bit and then hear from you as well. So Mike, if you go to that slide, thank you. Yep. And this may or may not be new information to you, but we wanted to ground it, ground the groups this way. So as you know, there are three groups that was subsea established.

You are all part of group #2. And some of you are part of group one and group 3 as well. And we thank you for that. I wanted to highlight this, the purpose and the focus of each group, because as we start to get into some of these topics, you'll see there's a lot of overlap.

So one example is where we want to talk a bit through the list today as the item of

the continuation of last week, but there are inherent connections to the workflow and questions we have around workflow. So if we are attempting to categorize the requests that we get or agenda items,

We're trying to put them in the right groups so that we can drive towards decisions and then share that information out. So these are the three groups that are established and we'll continue to work through these three groups. And we'll continue to add items. So as we said last week, the reporting and compliance group that we're all a part of here.

is where we're talking about lists. We probably could have put them in that work group #1 as well, but we wanted to try to parse things out and certainly get different topics moving along.

So I want to pause here and open it up if there are any topics, like now that we've talked through the agenda a little bit, talk through where we're headed in this session, and then some of the purpose of the work groups. If there are questions you have, considerations for the agenda that you want to talk through, I'll open it up for your comments, either in the chat or feel free to come off mute.

P

Pray, Sunshine D. / Ext. 3155 7:11

This is Sunshine. I have a question. We sent listen, you know, that it was like, hey, these are the things we need to make sure we have on there. And when I looked at our list, one of the things that's not pulling up for us is hearing, right? It's not showing up. We've only got auditory, which isn't the same thing in hearing, but hearing wasn't on that list, I realized. I'd sent that back to you.

I realized hearing wasn't there. So is there a reason, like it makes me nervous, did we miss other things that didn't pull over? Because the things I know, some of the things I know we need were not on that list.



Meller, Jennifer 7:44

Could you clarify, was that in one specific category in the list? Was it, or was it across the board in the list?

P

Pray, Sunshine D. / Ext. 3155 7:54

And what I...



Meller, Jennifer 7:55

Or would you have wanted across the board, I guess?



Hayes, Heather 7:55

Well, I can, Sunshine, I can speak to that one. So I just checked the list right now. A hearing is in the SDI. It is also in related. It was not in supplementary, and that is in the list to be added tonight.



Pray, Sunshine D. / Ext. 3155 8:09

Okay, perfect. Thank you.



Hayes, Heather 8:09

But it is in the other two. Absolutely.



Pray, Sunshine D. / Ext. 3155 8:12

Great. Thank you.



Meller, Jennifer 8:12

Thanks, Heather. I think you saw where I was going with that too. Maybe it was missing in one piece. So, okay.



Hannah Bolivar 8:20

We had a similar issue, and I'm wondering, can I resubmit ones that need to be added that weren't on the list that I was first going through?



Hayes, Heather 8:30

I might recommend waiting until after tonight. And I think this is in the presentation, but if anything that people sent back to Jennifer by Friday was added on Friday. Anything sent Monday, Tuesday, or today before this meeting is going to be added this evening. And then we could pull a new complete list so everyone can see what is in all of the categories, send that out to you guys. And then if you still see something missing, would that be?
Um, a good approach.



Hannah Bolivar 8:56

Yeah, getting an updated list would be great once things have been added.



Hayes, Heather 9:00

Welcome.



Meller, Jennifer 9:02

We'll take that as an action item, so.

Anyone else? Because I think maybe some of these questions are related to some of the updates that we have as well and kind of the status of things.

No.

Okay, well, feel free to put it in chat or raise your hand as we go along here too.

Okay, so let's move into just a quick summary of our decisions from our last meeting, just so that we're on the same page as to what we understood our action items to be walking away from that time. So we, as a group, determined that for a short-term immediate solution,

that ESD reps, so those of you that are on and representing a consortium of districts, would review the lists, work with the districts in your region, and send back those mission critical or required items to include for each category. In parallel, participating districts, so those that are here representing themselves, could also review the lists and send back those items to add in.

And that we would make those updates, you know, on a rolling basis, so there was no deadline. It was, we would work through those updates as soon as, as soon as they came in.

So that's what we understood the items to be from the last meeting. So Mike, you can go ahead to the next slide and we'll talk through what has happened since then. So where the list stand. So I can start and then Heather has been much closer to the actual updates happening and can talk through that as well.

So, as she mentioned, lists that were received last week, so as of Friday, were reviewed and additions were made over the weekend. Lists that have been received this week, so Monday and Tuesday, will be completed by the end of the day today.

So that's when we can send out an updated list to you all of updated the comprehensive list to see, so you can see the current state. No options were removed at this point. And this is, I know something some of you sent back in

terms of a request for removal of items. At this point, we are, this is an additive list. We are adding to it.

because every district, every item on that list had come from a district request at some point, whether that was in 2.0 or whether it was a recent recalibration and saying, oh, we need, we need this. So we do want to talk to you about what that means longer term and if there are ways that we can start to think through alignment of different items so that that list is not so long and so, you know, contradictory from one district to another. So that's kind of something we'll put a pin in for the moment, but we'll want to talk back, talk through further. So requested items that were already in the lists had been confirmed. So some of them that you sent back already had been there. So Heather and team have done a line by line analysis of every single one of these lists that have come through. A few requests were not added because an equivalent option already existed. So For example, audiology versus audiology services.

This was our working through ways that we weren't going to have so many duplications. But this is where I think it's critical for your continued feedback loop. If there are examples like this where you say for whatever reason, we absolutely need this.

then that was important for us to talk through and to understand those implications. So, Heather, I'm actually going to ask you to talk about the next one in terms of the repeat names as well as the Medicaid piece.



Hayes, Heather 13:11

Sure. So one of the components of the system is our services list. There is kind of an umbrella category of services. And then we have sub lists for related special education, supplementary aids. But one of the limitations in our system is that you, if we have occupational therapy as the exact name of an item in special education services, we cannot also have the exact same name occupational therapy in related. The system is expecting that there must be some type of differentiation both for kind of the user to make sure they know, you know, what the difference is in a service placed in one area versus another, but also for reporting. and for things like Medicaid billing. So you might see some, for example, occupational therapy and then in parentheses related or in parentheses, SAS to help to separate those different services. And then the last piece on here, Medicaid related list requests. So we.

Part of the challenge with having all of these different variations of services is making sure that we have what everyone needs for Medicaid billing as well. I know not all districts do Medicaid billing with PCG, but for those that did in 2.0, you might remember that when you logged services, in Easy Track 2.0, I believe was what it was called, you only had five or six options. It was OT, PT, speech. So it was just the main services that are listed as, you know, health related services or speech as special ed, right? But there was only one version of that service to document for Medicaid. So we're trying to now. reconcile the fact that we have so many different services that might be Medicaid billable. And we are currently coming up with recommendations for how we could handle that and also bring that to a group. I don't know if it's this group, another group. That was one of the questions I think we had for today was folks that deal with Medicaid in your districts, we might want some of their input as well to make sure that we are handling that. this the right way. And I know there will be some questions for both of those items, so...



Meller, Jennifer 15:28

Yeah, there's some hands up. So, Margaret, it looks like you were first up there.



Margaret Harriss 15:36

With the Medicaid is that's what's causing the let the students not to show up on my providers. Some, okay. And so what I tried is to, you know,



Hayes, Heather 15:44

Yes.

There are two.



Margaret Harriss 15:52

add all of the different variations of what their service is and now they're having other issues. The student might be there, but now they can't get into the service. So is that...



Hayes, Heather 16:07

Exactly. That's what's causing frustration.

MH **Margaret Harriss** 16:07

That is a known error right now that you guys are working on.

 **Hayes, Heather** 16:11

Exactly. So we're trying to figure out what the right setup needs to be for specifically for logging and Medicaid. And that may, again, we're coming up with a couple of recommendations and hope to have those provided for folks to vote on or give input on next week. But for now, what you can do to solve that problem. And I think we can, Kris, make sure this is in.

You know, maybe just to highlight, I know there's office hours each week and also that that weekly update, but there are two aspects for a student to show up in a logging wizard for the for a user. One is that that specific service has to be in the workspace of of a plan or 3.0. So if.

they have, and then the second is the user has to have can provide checked off on their user information page because we don't want, for example, a speech therapist documenting occupational therapy services. So it's a safety check there. So if you see under the user's information, you have checked all of those.

different options for OT, for your occupational therapist, and that they are still not seeing the student in their logging wizard, then you would ask them to go to that student and just add occupational therapy to the workspace, and then they should be able to log.

MH **Margaret Harriss** 17:28

Okay, and the workspace is inside of their wizard, the student file.

 **Hayes, Heather** 17:34

No, sorry. My apologies. The workspace is the IEP process. So I think that is another kind of fundamental difference between 2.0 and 3.0. What you're seeing, what all of you are seeing right now when you go into the IEP process is what we call the workspace. It does not mean that that is what that is the student's historical IEP.

That is just data that is sitting in the workspace waiting for the next IEP, for example.

MH **Margaret Harriss** 18:01

OK, alright.

 **Connor McCroskey** 18:01

Can you can you clarify? Can you clarify related to this the the transfer?

 **Meller, Jennifer** 18:06

Margaret, would it be helpful to include as part of our follow up just some, like those two items to check? Yeah, like what Heather was talking through. Okay. And so I think this is also where we had some questions further down in our agenda, just in terms of sharing out information and how to make sure we are hitting all the right audiences at the right

 **Hayes, Heather** 18:13

Nations, yep.

 **Margaret Harriss** 18:15

Yeah, that would be fantastic.

 **Meller, Jennifer** 18:30

level. So your input on how and where to send some of that and is valuable too. So we'll put it in these notes for you, but please know you can send it out to others that might need that information.

 **Margaret Harriss** 18:45

Okay.

Fantastic. Thank you.

 **Hayes, Heather** 18:51

And did you have a related question? And I know we have another hand up, but if it was related to what I just said, I wanted to capture that.

 **Connor McCroskey** 19:01

So that does that process, how does that work for transfers? So like the transfer IEP is just kind of living there. We are not required to put services in the transfer workflow. So how does that then translate over to my SLP billing for Medicaid, for example?



Hayes, Heather 19:18

In the transfer process, it should transfer over whatever was in the workspace in that previous district into your workspace in your district. So if it doesn't, then that SLP would just go in and add, or if it was a different service for whatever reason, it's the other reason that we're hoping for more consistency across the district so that when you transfer,

Those naming conventions all stay all stay consistent, but as long as they just add a speech therapy service to the workspace, they will be able to document services and log.



Meller, Jennifer 19:56

Um, Hannah, do you want to jump in and then I want to make sure we get to the questions in the chat too, but I know you've been waiting.



Hannah Bolivar 20:02

Yeah, I wanted clarification on the third bullet point for notes there on that slide. Are you saying that if some, if occupational therapy is in SDI, then it can't also be unrelated in SAS?



Hayes, Heather 20:21

exact wording, that is correct. So I have gotten a request that occupational therapy be in all three, SDI related and SAS and our system cannot do that. So we have to have some type of differentiator between occupational therapy and each of those groups.



Meller, Jennifer 20:24

Yeah.



Hannah Bolivar 20:38

And so your solution to that is adding in parentheses the category. Okay, I just wanted to make sure I understood that.



Hayes, Heather 20:46

That could be, I mean, honestly, that could be something that this group, if you have

a better recommendation or idea, then we could take that and discuss it and potentially, you know, vote on that too. We thought that made the most sense, but again, we're open to feedback.



Meller, Jennifer 21:06

So it looks like Analisa had a question. Is that no duplication issue something that you're working on fixing?



Hayes, Heather 21:16

It is a core system limitation and is not something we can fix.



Meller, Jennifer 21:16

Doing.

Do you want to explain what?

maybe how that connects to the conversation, Heather.



Hayes, Heather 21:28

Say a little bit more, Jennifer.



Meller, Jennifer 21:31

I think this was early up in the conversation. I think what you are talking about is the no duplication of items on the list, right? So we can't have two of the exact same.

And Elliott, is that the question? Does that answer?



FA Ficklin, Analisa 21:41

Yes.

That's what I'm talking about. Like if you're trying to fix the fact that you can't have occupational therapy or you can't have classroom paraeducator support under both related and supplementary aids and services, which would be appropriate. So I think what you're saying is you won't be fixing that, but we'll see classroom para support. Parentheses related on one list, classroom para support, parentheses supplementary on another list. Is that what you're saying?

OK.

Thank you.



Hayes, Heather 22:14

We are making sure to add things to whichever list or you're asking for.



Meller, Jennifer 22:20

Yes, exactly. Like, what's in the example? Yep, in the chat.

And then, Becca was asking, can you show us how to do this? I think that was related to...

Um...

I'm not sure that's related to the transfer piece or if it was related to...

Provider setup.



Anderson Becca A. 22:41

It was more related to the easy track thing and showing us the workaround for SAS. So like if occupational therapy is currently on SAS, how do I get it so my OTs can chart on that?



Hayes, Heather 22:42

User information.

I.

That would be adding it to the workspace under related currently.



Anderson Becca A. 22:59

So just open an IEP and put it under related or I have to do an assessment revision.



Hayes, Heather 23:04

Yeah.

Nope, just go to the IEP process. So there's no opening, I don't think anymore. Kris, please correct me if I'm wrong, because I know things are a little different in Washington.



Anderson Becca A. 23:14

I create essentially an IEP amendment and just put OT in the related. I don't have to finalize it and it'll allow them to chart.



Hayes, Heather 23:22

You don't even have to create an amendment. You are just going to go to the services page of the IEP process and add occupational therapy. That's it.



Anderson Becca A. 23:28

Mhm.

Okay.



Margaret Harriss 23:32

Could we get, could we get like screenshots within the notes just to make sure that we are going to where we need to go?



Hayes, Heather 23:36

Thinking that exact thing, yes.



Meller, Jennifer 23:36

Yeah.



Anderson Becca A. 23:38

Yeah.



Meller, Jennifer 23:39

Yeah.



Anderson Becca A. 23:41

Yes, please.



Meller, Jennifer 23:43

Yes.



Margaret Harriss 23:43

Fantastic.



Meller, Jennifer 23:48

Okay. So 2 just requested items on this slide. So if you have not sent your list or after we send the update tomorrow and you say, oh, I'm still, you know, I thought about this and I need to add this, please continue to send those through. As I said earlier, there's no deadline. We will continue to add them.

We are going to move, and I think this is maybe on the next slide, but to twice a week updates to make sure that we're addressing all requests that are coming in and evaluating them in a timely manner and getting those through. So that's what you'll see. And then if you



Landwehr, Michelle 24:18

It's 2 minutes.



Meller, Jennifer 24:31

or others that you know of want to be part of a specialized Medicaid group, please let us know. We didn't want to assume that this was the same group that might want to participate in that, but we do have some very specific questions. So it could be your Medicaid coordinator or it could be someone that you know, you know, of another district that you say, oh, that person is a whiz at this. I know those people are out there because I've worked with them before. So we want to tap their brains on some of those questions that we have and making sure we're thinking through all the different decision points.

Look at that, we have our first volunteer. Thank you, Joy. Great, so keep those coming in. You can also e-mail us after.

Okay, so I'm going to move us on to the evaluation and IEP services linkages. So, Heather, do you want to talk through this item? And I will say before you jump in, there are multiple components of this. So we're going to talk through at a high level one.

component of it today and ask you some guiding questions to make sure we're thinking through what a potential recommended solution is.



Hayes, Heather 25:50

And I again may also lean on Chris for some for some subject matter expertise here, but specifically with respect to issues of things not completely matching between your evaluation and your IEP services. Chris informed us that there that is an optional feature that a number of districts don't have that turned on.

And I think equally many or more do have it turned on. So if that is hindering you to the point where immediately, so this would be a short term solution and we can talk through, you know, already had a potential idea for a longer term. So short term, if you would like us to turn off that linkage so that you can create your IEPs as needed with whatever slight variation in wording.

there might be between the services recommended and the services. And I'm assuming again that that's things like behavior consult versus behavior consultation. Like there are just slight differences in wording which cause that linkage to break.

Chris, am I, did I say that correctly? Okay, she's giving me a thumbs up. So she said I said it correctly. So for right now.

that linkage has to be literally verbatim, character by character matching. Short term, we could turn it off. District by district, that could be an individual decision that you send us and let us know, and we can do that immediately. Longer term, I already had the idea of, well, does it need to be verbatim matching, or could we work together to create a mapping list where if you said motor, for example, then your IEP services could be OT or PT and that may be a horrible example. But whatever you're choosing in that recommendations area, there might be several different services that could satisfy that. So.

Again, that that is a potential. We haven't really I haven't really gotten to to dig in too much to this particular one yet, but we are looking at both short-term and long-term solutions for some of these issues. I already saw a hand up.



Meller, Jennifer 27:55

Go ahead, Connor.



Connor McCroskey 27:58

Related to this, I guess what my region was running into was less around the linkage between like the areas being exact. It was more the process being challenging because they were finding that they weren't able to open a draft evaluation and a draft IEP at the same time that were connected. They were having to finalize the evaluation before they could open a draft IEP, and that creates just like process and workflow challenges for teams who want to do both in like any given meeting. And so that was the main frustration, at least in my region, around the... the linkage and we obviously can't, we didn't have the option anymore to link to a

open eval versus a locked current eval like we used to. So just sharing that as the pain point, at least in ESD 112.



Hayes, Heather 28:52

Perfect. Thank you. I think that is the second thing that Jennifer was mentioning. So we understood there were kind of two ways that this is impacting districts. And I do think that that second one, again, very immediate short term, we could turn off the linkage, but not even long term, but just, you know, a little bit longer term. I think we could

make sure that that carry through happens not only when it's finalized. So I think we can think through some options there and also bring that to. Jennifer said I was getting a little confused between this group and the workflow group, but bring it to one of the groups to make sure that we've got the right permanent solution.

for both of those challenges that you're having.

So, thank you for.



Meller, Jennifer 29:37

Yeah, I think to that point, yeah, Heather, we thought that that like would be a second question we would get around around this, these connections. I understood that there, we are already working on a development next step around that having the relevant information carry over. And so that will be available within the next two to three weeks. So I think that will solve kind of where you, that concern. And so for this group, it might, we may want to talk for a few minutes about brainstorming.



Hayes, Heather 29:55

An issue.



Meller, Jennifer 30:16

short-term solutions to that, knowing that there are some fixes that are underway that we've gone ahead and started working towards so that we're not delaying anybody further.



Connor McCroskey 30:40

I mean, I guess just to jump in again, like your recommended solution solves the problem. The implication is that the compliance, right? Like my teams now have to

make sure that they are accurately translating the evaluation information accurately into the IEP because it's telling them it's complete.
even though it's technically potentially not complete.



Meller, Jennifer 31:04

Is there something we could help with in the short term that comes to mind? Is it a different user guide? Is it...

language that we share out, is there something that would be helpful in the short term, knowing that there are some longer term fixes that are underway?

And this is to just be a question for you, Connor. I know to put you on the spot. It could be for anybody that wants to chime in on that.

Something comes to mind. We can certainly come back to that topic. But we wanted to give this update at least. We wanted your feedback on if we would offer this option to districts individually. So this doesn't have to be an across the board kind of thing.

to unlink the areas of evaluation from IEP services for this year. So could be for a couple months, could be for the rest of the year in order to allow you to do further training with your teams to make sure that no timelines are delayed because of this.

What implications do you see in your district if you choose to disconnect that linkage? And I guess to continue on those questions, like how could we, how should we convey that option to districts? And what materials would be helpful in explaining the implications?

of what that would mean if those sections are not connected temporarily.



Pray, Sunshine D. / Ext. 3155 33:00

If they're not connected, we risk our people missing valuable SDI, right? That's the concern, that we wouldn't be able to verify that. And right now, ours are not pulling up correctly anyway. So in our district, we're going through, and God bless these people who have thousands of kids, but we're going through nearly 500 and trying to make sure everything's right so that we don't mess up because the things still aren't connecting correctly. But that's the biggest thing is that people are going to drop SDI and then we're going to get sued.



Meller, Jennifer 33:35

Do you have some examples that you could share of where examples of the things

that appear not to be connected, you know, directly connected correctly? And you don't do it the second, you can send them to us, but that would be helpful. Yeah, because I think the more we can see those and perhaps identify patterns or maybe there's...

 **Pray, Sunshine D. / Ext. 3155** 33:48

Okay, okay, I'll send it to you because I do have a few. Okay.

 **Meller, Jennifer** 33:56

there are other factors that are driving, like maybe some, you know, just for us to unpack it would be helpful.

 **Pray, Sunshine D. / Ext. 3155** 34:02

Yeah, I have another question then, because we've been trying to put hearing on and it is pulling up in the SDI, but now it's not pulling up over in the present levels. Is that because the IAT was already open?

Just another question.

 **Hayes, Heather** 34:18

Yes, I think I'll need you to.

 **Pray, Sunshine D. / Ext. 3155** 34:19

Because there are different services.

 **Hayes, Heather** 34:21

Note that down, because I'm not sure about the levels.

 **Pray, Sunshine D. / Ext. 3155** 34:25

Okay, you want me to send a help desk ticket for that?

 **Hayes, Heather** 34:28

Oh, I was just saying, we'll note it with Chris on the phone, the local team, to take that one down.

 **Pray, Sunshine D. / Ext. 3155** 34:31

Okay. Okay.

Perfect. Thank you.



Meller, Jennifer 34:42

Hey, Hannah, do you wanna?

Erin.

Oh, you're on mute, I think.



Hannah Bolivar 34:50

So sorry. In response to your previous question about what issues would it cause, to me, it's potentially stopping one problem and creating a much bigger, I don't even know if I'd say bigger, but another problem of equal size. And I don't really want either of them. So



Meller, Jennifer 34:52

Okay.

Yeah.

A different one.



Hannah Bolivar 35:10

to me that that doesn't make things better to to unlink them.



Meller, Jennifer 35:19

Yeah, we certainly saw a risk in that too, but that's why we wanted to talk it through and I think, think about how to convey that potential of unintended consequences by just solving one problem and potentially creating a different one. So how we convey that to districts. But we have had some districts request this. So that's where we're just trying to weigh how we give them the information to make the right decision for them.



Gregoire, Kris 35:41

Huse.



Andrea Staton 35:47

Well, I think I'm up next. I think then just keeping it district by district would be the

only solution that there is. Because I see where this would agree with other folks that this is going to create more problems than it's worth. But if an individual district wants to wrestle with that, I think that's where we're all really struggling as we lost our individual control of the program.

And that was a major oversight on the developers. And that by losing our individual control where we could make sure that we uploaded the correct naming conventions, all of this would be solved. I don't want to rehash things in the past, but this is dangerous because the most important thing is serving kids. And while as much as we want the paperwork to match, at the end of the day, we got to serve kids. And we're going to miss serving kids if we screw up this language. So I think this has to be, in my opinion, should be individualized per district. District wants to turn it off and they get to deal with the implications of that. But I think it should probably.

Yeah, I said this needs to be something that we can control at the district level.



Meller, Jennifer 36:51

Katie, you think you were up next?



Betty Lopez Selah SD 36:54

Thanks. I am not sure if this, if I was understanding correctly in terms of the conversation we were just having about Medicaid and using the workspace to drop in the right name for services. Is there any way that a workaround to keep the linkages there but...



Katie Howell 36:55

Yeah.



Betty Lopez Selah SD 37:12

map the titles so that they flow, that we could open up the workspace for the eval to code the services using the dropdowns that are there and still be able to do what we need to do on the IEP. I don't know if that's an interim fix. I do know one of the glitches we're running into is that the validation.

pieces within the migrated data are still not on for services and accommodations and goals. So I had some people finalize or yeah, finalize an IEP and the service lines weren't showing because they didn't have dates there. So I don't know if there's

something in that in using the workspace.

As a temporary.



Hayes, Heather 37:57

I think that's a good idea.

As we talk through the options for solving this one this week, I think that's a good thought to consider.



Connor McCroskey 38:09

I mean, I guess if we're talking about like what would be helpful.

Like I don't know if there's anything you can push out that's going to like explain the idea that like your evaluation, your IP isn't connected. Like I can do that with my teams and give them guidance around how to approach that. Like learning for me when I ran into this problem was like there is a back end of things to turn on and off. And I didn't know that and I didn't know what I could request to be on and off. And like, for example, my linkage was just off for some reason, and I didn't ask for it initially. And so having that information, at least at like a director level in some way, will help us to know how we can potentially create workarounds with our individual districts and teams.

try to create solutions on our end, but like I had no idea there was a list of backend on and off options for my district that I could maybe toggle. And so that would be helpful information, at least at our level to then work with you all around solutions.



Meller, Jennifer 39:10

My mind was going the same place in trying in, I think I said to somebody earlier today that even though this concept may have been provided, you know, explanation and training, it doesn't click until you're doing it, right? So it kind of all felt theoretical and not knowing, and that was on us. That was on us to explain.

what the implications were going to be. And so talking through how do we share kind of what's what can be individualized by district, you know, by a configuration versus what is not able, you know, what's kind of a core functionality. You know, I think we need to take, we'll take that as an action item.

to figure out how best to display that. It gets pretty complicated. But I think we need to be as transparent as we can be with all of you about what those levers can be that you have as districts and what, you know, what is what needs to stay because of

security and, you know, requirements requirements on data privacy and those kind of things. So

Um...

But we will take that as an action item as well.

Okay, so I'm checking on the chat here. Wait, were there any other hands up before I make sure? Nope, okay. Not for the moment.

Example, okay, so Michelle is going to send some more examples that will be helpful. List of items like configurations, yes.

A lot of information to come up at office hours. Kris, can you answer this where the recordings are stored for office hours and how to access FAQs and other resources?



Gregoire, Kris 41:01

Amy Taylor, who has been responsible for the office hours, she has been out of the office and she's been owning the meeting. So we have not been sending the videos out for the last couple of weeks. But she normally, we try to send them out in our Friday update. But again, we haven't for the last couple of weeks as we just haven't had access to those.

I can touch base with her to see if we can include those videos this week in the Friday. She's back this week. We try to also send out those Q&A with those updates as well. So, but we have been a little bit behind. I'm going to be honest, just with her being out for the last few weeks. So we're going to work on getting those up. But usually it's the weekly Friday update where we get those out.



Meller, Jennifer 41:46

Okay, and so Betty's saying a shared file versus e-mail only with videos would be great. So let us brainstorm on that if there's a place to put that.

I believe we could put them on the main page as well. We'll have to talk through that. I know there are training videos there. So yeah, yeah, so that could be another option, just that they're out there and available. So.



Gregoire, Kris 42:04

There are training videos, is that correct?



Meller, Jennifer 42:14

This is, this kind of feedback is very helpful because we know people absorb

information differently at different rates and they're going to different places for it. So, you know, the more feedback we hear of, this is helpful to us, this is where we would expect to find it, the more that we can be responsive and post things in multiple places.

if that's the most helpful. So we'll keep pointing back to those Friday newsletter outreach and we'll work hard to make sure those are information's integrated there so that you at least have a place to start. And then information can appear in a couple of different places as well, but at least you'll see.

That could be a starting point.

Okay, so it's like we got the comments there. Why don't we move on to the next slide of just what you'll see in the next month. So the improvements that are already underway, and then we'll talk through some of the longer term.

solution. So Heather, do you want to take?



Hayes, Heather 43:20

And these are not all of the improvements. These were mostly just related to what we had already discussed last week and the list items. And then Sarah did also want to share the IP meeting date update, but there are a number of other things that are in process and being updated and corrected and fixed as well. So relevant to this group and our conversation last week, as we said.

We're going to keep adding any of those critical list items that you're asking for on an ongoing basis twice a week to help combat the fact that these lists are going to grow and be difficult sometimes for staff to figure out what they're looking for. We will be adding, the best way to describe it is like a type in search field. So instead of just clicking a drop down and seeing, you know, 100 items,



Katie Howell 43:47

Yeah.



Hayes, Heather 44:03

they will have a type in text field, and if they type the word speech, it will narrow down the items to just those that match that word that they have typed in. So that is going into development right now. It should be available within the next one to two weeks. Along with that, and I do want to make sure, or do want to ask this group for validation of this, I got.

a lot of feedback internally and from some of our outside consultants. But one thing that I felt was or thought was missing potentially in all of our service information in the system right now is a delivery method field, something that is very clearly indicating whether that service is direct or indirect.

because there were a few services that I've been asked to add that it may not even be clear to me whether that's a direct or an indirect service and how folks are used to understanding that. So I would love to pause there before I go to the last one and ask folks if anyone wants to hop off and

help me understand how you did that in 2.0 and whether or not you feel like having this new field with your services would be helpful. Or if you want to say no, if you all say no, this is not going to be helpful for us, or that's going to cause more confusion, or for whatever reason, I would just like to get your input.

AS **Andrea Staton** 45:23

Well, the way we dealt with that before is we had control over what we named things. So that's the hard part is that we had the control. So as long as that delivery method field is not in the old program, a yellow required box, I, you know, does anyone else have to? Yeah, SDI can only be direct. Yeah, you're right, related could only be.

Or, you know, could be there. I'm seeing the chat, but...

CM **Connor McCroskey** 45:47

I don't like adding direct and indirect to options is going to create a lot of confusion because that's not something that our state is required to designate specifically. Like Betty mentioned in the chat, like related could be either SDI is direct, but adding that as a qualifier to these options is going to create a lot of confusion and work for me to.

AS **Andrea Staton** 45:57

Yeah.

CM **Connor McCroskey** 46:08

train my staff on how to pick which. And we just have flexibility between the two in certain cases, and we don't have to designate it as direct or indirect.

AS **Andrea Staton** 46:18

Yeah.

 **Hayes, Heather** 46:18

Oh, if you don't designate it as direct or indirect, I'm just going to play devil's advocate for a second. That directly ties into your minutes calculation and time removed. And that's where I'm struggling in terms of like how we're calculating our minutes and time removed from if it's an indirect service, those minutes don't get counted as part of the LRE.

AS **Andrea Staton** 46:37

Yeah, but that it, but it that never happened in the old program either, so...

 **Hayes, Heather** 46:44

But I guess what I'm saying is like, if we're saying everything in special education services is direct, everything in related is direct, and everything in supplementary is indirect, that's great. I can work with that. But if there are any nuances in any of those three, like where nope or related service could be direct or indirect, that's where I feel like we're going to get into trouble.

AS **Andrea Staton** 46:54

Yeah.

MC **Michaela Clancy** 47:04

I feel like we're going down a path that's going to cause us more issues, but I understand from a logic perspective and from a development perspective, we use, I'm going to use console and OT. If you put that into SAS or related, it's usually indirect, right? If this is how we're all taught in our state, and but, and then if I'm going to...

AS **Andrea Staton** 47:05

Betty.

MC **Michaela Clancy** 47:25

be that OT and I'm directly serving that kiddo, I'm putting that in STI. So I think we've used those three as separate, like I am very concerned that by adding that right now, we are going to create more confusion, more training on top of confusion, because that is not a thing that we discuss in our state, the way that you were describing it. Connor, did I like catch what you were saying? Because I'm like, that can't happen. I've already got enough things I've got to train.

 **Connor McCroskey** 47:49
Yeah.

 **Andrea Staton** 47:50
Uh-huh.

 **Connor McCroskey** 47:51
Right, yeah. I understand. I understand the desire to clearly identify the LRE through the minutes. 2.0 was SDI is direct, related is direct, supplemental aids and services are indirect, and I don't want that changed at this point in time.

 **Hayes, Heather** 48:05
I just find if that is how it's going to work. I just want to make sure then that the field understands anything they choose in related services, even if it's a consultation in, because there are a lot of those requests coming in to add consults to the related service list. That is going to be direct and it's going to be counted in your LRE. I just want to make sure that I'm clear with that. And if that is, if I get.

 **Meller, Jennifer** 48:17
Yeah, so go back to the list, yeah.

 **Andrea Staton** 48:20
Yeah, and...
Yep, Ann.

 **Hayes, Heather** 48:26
From all of you for that, then that is how we will direct, you know, the development team to make sure that that is what is getting counted, and we don't have.

AS **Andrea Staton** 48:32

Yeah, and that's the way it was in the old program. So that's the way it was in 2.0 is that if it was, if it was under those two categories, it was the minutes, the minutes and where the services were because it was driven by the location. Yes. So that's as long as it stays with that direct and indirect is just really

 **Hayes, Heather** 48:44

Sorry, also that. Yes, correct.

AS **Andrea Staton** 48:51

quite frankly, irrelevant. And if folks are putting indirect services and related, then they're not defining it correctly. I'm just going to get on my soapbox. I need to put it under SAS.

 **Hayes, Heather** 48:58

It's fine.

That is fine. OK, so we will.

 **Meller, Jennifer** 49:01

That's why we're coming to you. That's extremely helpful. Yep.

 **Hayes, Heather** 49:03

That's what I'm asking, yeah.

AS **Andrea Staton** 49:04

Mhm.

 **Hayes, Heather** 49:05

So we will strike item 3. So we will continue with the search type in search field, but we will not add that new delivery method field. Thank you all for your input. Anything else on that piece before we move to the last one?

So the last one is there are two ways to track timelines in 3.0. One, which is already in place, is based on the IEP begin date and the end date, and using those two cycle compliance symbols, we are in the process of adding a separate timeline tracking for

IEP meeting date, because there are also...

regulations in terms of, you know, if the meeting date is today, but the begin date is 5, 10 days out, you still have to have the next meeting 364 days. So folks need to know when that meeting has to be held in addition to when the next IEP must be in effect by. Those are two different timelines in 3.0. So that is in process. And obviously we'll have.

training, support materials, kind of screenshots as soon as that is ready. But essentially, just as a preview, there will be an M, a colored M, like a green M, if you're good with the IEP meeting date compliance right now, a yellow triangle with an M, those types of things. So it'll still stay consistent with our green, yellow, red, and still have the hover over. So when they hover over the symbol, it'll tell them.

The IEP meeting date is in compliance, that type of thing. So that is coming shortly in the next month, next couple weeks.

Any questions or concerns there?

Jessica.



Meller, Jennifer 50:57

Let's go to chat here. So Betty's asking which work group will be working on formatting and printing concerns. I would say we can add it to the agenda for group number one, which is the workflow kind of improvements training group. I think that's where it would likely fit the best.

So that group's meeting Friday. So in fact, I was after this, I'm going to send out an e-mail to request any additional agenda items. So that one we will make sure to add to that group.

Can we have the ability to print an accurate IP at a glance once the IP meeting has been held, even if the start date is later?



Hayes, Heather 51:34

Yeah.

So unfortunately, the way the 3.0 works is the IP at a glance only prints for the currently valid IEP, and currently valid only happens as of the start date of that IEP. So that is our challenge there. I will take that back again. That is the answer I have gotten in the past when I have asked.

the same question, but Jennifer, let's take this one back and double check, ask again

if something, if there's another option that we could look at there.
Give it.



Meller, Jennifer 52:13

All right, well, I know we are getting close to our time here. Oh.



Hayes, Heather 52:13

In.

Did you interest?

Did you address her first one too, which work group would work on formatting and printing?



Meller, Jennifer 52:20

Yeah, I think group number one, we'll add it. Yeah, we'll add it to the workflow training improvement one. Yeah. So Jeanne, yes, we can add you to the one to the work group, workflow work group on Friday. Okay, I know we only have a few minutes left and want to be respectful.



Hayes, Heather 52:22

One, OK.



Meller, Jennifer 52:39

of your time. So the one, so where we're headed. So Heather, do you want to talk through these briefly as well? And then I can kind of wrap up with our next meeting and preview of where we want to go in the next meeting.



Hayes, Heather 52:53

So again, all the things we've talked about so far today are all in our short term list. We're going to try to get things, you know, addressed and challenges solved as much as possible over the next few weeks. So all of our short term items that we've talked about so far, when we look longer term, which is not yet, we got to solve the immediate pain before we look longer term, but we are hoping to get towards greater consistency

in those list options over time. We heard openness to that last week, but just we got to do it more deliberately, slowly, get folks, you know, onboarded this year. And then

maybe we can look at doing that throughout the rest of the year and implementing them next year as an example of what that could look like.

Options for managing list length. So in addition to that type and search field, that's short term. We will look at how long our lists end up getting once we've added everyone's critical items over the next couple weeks. And then we will look at what our options could be to address shortening or hiding items and things like that. for different districts. And then lastly, I brought it up, I don't want it to be too much of A long-term item. That Medicaid piece is keeping me up at night because I want to make sure that we have everything in place the right way. So I do, I did draft a couple options I would like my internal team to validate before we present them. to the Medicaid group. So I know I saw a couple of people, thank you, volunteer folks for the Medicaid group. We will also try to reach out to WSPC, I think, Jennifer, and ask them to put the word out for anybody who wants to help us with that, with those Medicaid implications. And then we will go from there.

Again, those items are just related to where we're headed with the lists. And I think your next slide, Jennifer, is going to be other things that we need to start tackling.



Meller, Jennifer 54:41

That's right.

Yeah.

Yeah, so for next week, same time, same place, you all should have that invite. We went ahead and set these invites for the next few weeks. We'll reevaluate them if it still makes sense to meet every week, but we really wanted to keep this momentum going. So

Those you will see for the next several weeks on your calendar. Next week, we want to talk about three things. We know that there are many other items that you might want to consider adding and talking through, but the top three for us were around the accommodations list and state testing lists.

So verification, you have what you need, making sure we review them and make sure there are no concerns about what those current lists are. Continued options for evaluation and IEP linkages. So we'll provide you some updates on some of that and then kind of repeat back what we heard from this meeting and make sure that we're clear on those next steps.

And then there's a big one, data and reporting, the.

The focus, the purpose of this group is to include data and reporting. So we will pull

in some other folks, particularly those that are deep in the weeds of the right back at the moment. And so we will pull in some additional resources to talk through that.

We don't have a specific

ask at the moment. We could by next week, but if there are certain questions that you have or need, we certainly are getting input from the front Zendesk, from emails about certain types of reports. So that will likely be a good portion of the conversation too.

Continue to bring district examples and questions. So thank you to those of you that said you would send through some examples of things that don't appear to be mapping the right way or as you would expect. The more specificity we have to explore that, the better. And we will send materials, certainly the follow up from this and then the agenda.



Katie Howell 56:57

****.



Meller, Jennifer 57:00

for next week ahead of time.

Hey, last questions, reflections, additions for today's session.



Katie Howell 57:21

I have one question.



Dana Anderson 57:22

I just share my appreciation for the district leaders engagement and active voice and the way our team and partners at PCG are doing incredible things to respond and implement the direction that you're receiving. So lots of gratitude. Thank you so much, everyone.



Meller, Jennifer 57:40

Stina.

All right. Well, we'll see some of you on Friday. If you want to join us again, let me know when you're not on that list, but otherwise we'll see you next Wednesday.

Thanks, everyone.



Hayes, Heather 57:51

Thank you, everybody.



Gregoire, Kris stopped transcription