

Workgroup #2: Reporting and Compliance Advisory Group

IEP Online 3.0

September 23, 2026



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Solutions that Matter

Agenda

- ❖ Opening and Listening
- ❖ Updates Since Last Week
- ❖ Short- and Long-Term Plans
- ❖ Open Discussion and Next Steps



Reporting & Compliance Workgroup Participants

Name	District	Name	District
Andrea Staton	ESD 101/Mead	Betty Lopez	Selah School District
Dana Floyd	ESD 105	Chris Bettineski	ESD 112, Kalama, Wahkiakum
Connor McCroskey	ESD 112/Battle Ground	Dawn Kellogg	Olympia School District
Margaret Harriss	ESD 112/ESA	Hannah Bolivar	Mercer Island
Katie Howell	ESD 113/Chehalis	Jeanne Foster	Castle Rock School District
Michaela Clancy	ESD 114/Port Angeles	Joy Rawls	Bellingham
Michelle Lanwehr	ESD 121/Bellevue	Juan Gandara	Franklin Pierce SD
Jameson Moore	ESD 121/Tahoma	Laura Staley	Rochester School District
Janna Rush	ESD 121/Peninsula	Nicole Lowe	Castle Rock School District
Sunshine Pray	ESD 171/Quincy	Steven Dahl	Mt Baker School District
Becca Anderson	Mukilteo	Analisa Ficklin	Bellingham Public Schools

Not listed above? Add your name, district/organization, and email in the chat so we can update the roster.



IEP Online District Advisory Groups

1. Workflow, Improvements, and Training

Purpose: Ensure IEPOnline 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 IEPOnline 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 IEPOnline. 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.



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

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Decisions from Last Meeting

The Advisory Group's decision for a short-term, immediate solution:

1. **For ESD reps:** each rep will review the lists and work with their regional districts to send back a mission critical/required list of items to include for each category.
2. **For Participating Districts:** each rep will review the lists and work with their ESD to send back a mission critical/required list of items to include for each category.
3. **PCG to make updates.** PCG will add items requested on a rolling basis.

Where the Lists Stand Today

Evaluation areas and IEP services

Status

- Lists received last week were reviewed and additions were made. Lists received this week will be completed by the end of the day today.
- No options are being removed at this point — every item in the lists came from a district request

Notes

- Requested items that were already in the lists have been confirmed
- A few requests were not added because an equivalent option already exists (for example, Audiology and Audiology Services)
- Names cannot repeat across SDI, Related, and SAS, so some options carry a qualifier such as "Occupational Therapy (Related)"

Request

- Medicaid-related list requests are under review with Washington Medicaid experts before they are added under SAS
 - *We are seeking input from a few districts to support on a specialized Medicaid workgroup.*

*Please
continue to
send
through list
updates
you
receive
from your
ESD/
districts.*



Evaluation and IEP Services Linkages

The naming convention of items in the evaluation is very specific, so even the slightest change in naming will cause options to not be available in the IEP services drop-down.

Recommended Solution - Offer the option to districts to unlink areas of evaluation from IEP services for this first implementation year.

Guiding questions:

- What implications do you see in your district if you would choose to disconnect the linkages?
- How should we convey this option to districts?
- What materials would be helpful in explaining the implications of disconnecting these sections temporarily?



What You Will See in the Next Month

Improvements already underway

- New list items added for all districts on an ongoing basis, roughly twice a week
- A type-in search field on each services dropdown is in development, so options are easy to find as lists grow
- A Delivery Method field to designate whether a service is direct or indirect
- Add separate timeline tracking for the IEP meeting date. The result will be timeline tracking for both the Next IEP Meeting Date and Next IEP Date, which can be different.



Where We Are Headed

- Greater consistency in list options over time, working with districts on naming (for example, Behavior Consult and Behavior Consultation)
- Options for managing list length once the critical items are in place
- Completing the Medicaid review before finalizing where services appear



Next Meeting: Wednesday, September 30

- Wednesday, September 30, 2026 | 1 – 2 PM PST
- Topics:
 - Accommodations lists and State testing lists
 - Options for evaluation and IEP linkages
 - Data and reporting
- Bring your district's examples and questions
- Materials to follow





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