

User Permissions and Roles Advisory Group-20260925_150511-Meeting Transcript

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49m 12s

● **LaBounty, Steven** started transcription



Meller, Jennifer 0:03

who are on as well.

All right.

So I'm going to turn this over to Heather and Sarah to talk through where we were last week, what's happened since, and then what the next component of this area is that we want to talk through with you.

Heather and Sarah.



Shepherd, Sarah 0:29

And I won't jump in front of you. Heather, did you want me to take it? I don't think we talked about who was doing which one.



Hayes, Heather 0:31

Yeah.

We did not. If you want to get started, yeah, go ahead.



Shepherd, Sarah 0:37

Yeah, I'd be happy to. So after our first meeting last week, we had these three topics that we specifically discussed with this team and really appreciate all the input that was received. And so we actioned out and made those changes. So these are all things that you should have expected to see in the system, but I just wanted to make sure we close that loop so everyone understands where we stand today.

The first one of those is opening up that inactive student access. So again, that was opened up to groups 3, 3B, 4, and 4A specifically. Remember, those are permissions that have access to all students in the schools that they're assigned.

So you're specifically not seeing 3A. We didn't skip them. But remember, those are folks that just have access to students on their caseload. So that prevented them from being able to be included in this particular group. But they all now can see in

their menus, in those blue menu bars in the system, that they can go in and look at inactive student records. They don't have that ability to reactivate students that still resides with those admin group permissions.

The second change or update that we made in the system after this group met was around reports. We'd resolved that issue where users were seeing reports that were run by others. That brings to mind, of course, just that security and access to student information. And so we'd really locked that down.

and made some development changes. And so we've restored access to reports. So when someone runs a report, they see it in their My Reports output. So that's just personal to them. And they can see the information, of course, that they have access to in terms of students.

And then the 3rd and final change we made after this group was around student transfers. We really heard that need for another permission level differentiated from permission group 2 that had the exact same permissions except for the ability to access that student transfer process.

So we essentially copied permission group 2 and then removed that access to the IDT or student transfer process.

And I think we... Mm-hmm.



Margaret Harriss 3:07

Isn't that process wasn't?

Wasn't permission for identified as the group to have the IDT access?

Am I am I missing something?

I wasn't in last week's group, so...



Shepherd, Sarah 3:26

Oh.

So the request that we had and sort of the decision we put in front of this team last week was specifically tied to that permission group too. So what we heard from districts was around school psychs or ESAs that were in that permission level and needed to differentiate some districts having IDT access, others not.

We did not at all talk about opening up IDTs to any other permission outside of group 2.



Hayes, Heather 4:00

But we can discuss that. We can discuss that today if you'd like to.



Margaret Harriss 4:00

Okay, maybe I'm.



Shepherd, Sarah 4:02

Yeah.

Mhm.



Margaret Harriss 4:05

I just thought that on the list, on the primary list that we were given, that permission for was specifically for Sykes.

that because of that permission was provided in #4. So, but maybe I'm.



Shepherd, Sarah 4:18

Yeah.



Margaret Harriss 4:27

You know that was that was a month ago, so I...



Shepherd, Sarah 4:31

No.



Margaret Harriss 4:33

Okay, so Sykes, they should have 2A to have the IDT access.



Shepherd, Sarah 4:35

Mmh.

They'd be in group 2 if you want them to have IDT access. They would be in 2A.



Margaret Harriss 4:46

Oh, and to a, if not.



Shepherd, Sarah 4:48

If you don't, right?



Margaret Harriss 4:50

Okay.



Shepherd, Sarah 4:51

Yeah.



Hayes, Heather 4:58

There was one other thing we forgot to put on this slide and we could add to it, but it was also adjusting the notification settings so that folks of your level and one, I think ones and twos, you can confirm for me, Sarah, which all we did, but you were getting notifications.

You know, for every student in your whole district, now you should only get notifications if they were on your personal caseload. So that was the 4th change that was made last week.



Shepherd, Sarah 5:23

Mhm.



Hayes, Heather 5:32

So there was one follow up, and that's kind of the next step here under three. And then we certainly can expand this conversation past the 2A. But we had one person from the group ask a clarifying question about simply being able to request transfers. They are two different permissions, requesting and approving.

And for this specific permission, we can set it at the entire user type level, or you as administrators could give specific people the ability to request or approve transfers. So our recommendation was to leave 2A as neither.

in terms of the user type level permission, but if you in your district want to give people in that permission group or any permission group the ability to request and or approve transfers, then you could do that here. I think the one caveat to that is we would need

somewhat menus. So Sarah, if they don't have the menu option for it, then they

wouldn't be able to do it even if you gave them the permission. So we might need a little bit of help from you guys if there are certain groups where you are thinking you would want to give this to certain people. And then we can add the menu option for them.



Shepherd, Sarah 6:38

No.



Hayes, Heather 6:51

for that whole group, but then the people that don't have the permission would just get an access message when they tried to go there. So we'll open it up. What do folks think, what discussion would you like to have around kind of, again, this additional transfer permissioning?
for your stuff.



Margaret Harriss 7:13

I think it might be helpful for.

specific people in my districts that were used to doing them. For the majority of them, they come through me. But I think if I was able to give somebody permissions to request the transfer, not necessarily to approve them, but to request them, would be great. And normally they would be falling under probably the permission three group.



Hayes, Heather 7:48

So we'll note that one down. Any anyone else in that same boat? And if so, what other permission three, what other permission groups might you might you think of that you?
might have folks that you would want to give one of those permissions to.



Paige Williams 8:06

So for us here at North Shore, we have our psychs and SLPs in permission group 2, and we would like for them to request IDTs, but not approve them because we have our records person approving them.



Hayes, Heather 8:25

Okay, so then what I think we should probably do is move those folks to 2A, and then you can give them that request transfer for those specific people. How many folks are we talking? Just so I can get a scope as well, knowing how many people you'd have to go in and check that box for.



Shepherd, Sarah 8:30

Okay.



Paige Williams 8:43

For me, it would definitely be more than 10.



Margaret Harriss 8:47

Yeah, and I've probably got about 40.



Paige Williams 8:47

Yeah, I don't have like an exact number. Yeah.



Hayes, Heather 8:53

So then the next question is, should we make it an entire, you know, user type permission to request our folks against if we for 2A, for example, if we did make it for that entire permission group that they are able to request but not approve? What are thoughts on that?



Paige Williams 9:11

I, I like, I like that idea to have them request to a the ability to request but not approve.



Margaret Harriss 9:21

Yeah, I can go with that.



Hayes, Heather 9:24

Bring the same question for three, but let's start with 2A.

Is anyone opposed? I hear some, I heard at least three and see in the chat support of the requesting. Is anyone opposed to permission 2A being able to request?

What if I extend it to three, because that was the other one that I heard folks are

wanting to be able to request. Is that is that common across districts?
Would that be helpful for North Shore, for example, or no?

 **Paige Williams** 10:09

We have our sped teachers, so our case managers in permission group 3. So if they were able to request but not accept, then yeah, that would be, that would be okay too.

 **Hayes, Heather** 10:19

Yeah.

Hi.

Any other thoughts or considerations from others? Okay, so Carrie is not interested in adding it to three. So then that is where we would get back to, you could certainly add it for individuals that you want to have that permission on their user information page. But for the entire user permission, we'd have to have kind of an...

Either it's on by default or off by default and you could add it to individuals as you as you would see fit.

 **Margaret Harriss** 11:03

I would be fine with just adding it if I need to for group 3.

 **Hayes, Heather** 11:12

And then did I also hear someone say 4 as well or 4 are you thought 4 already had it. Do we need to double check on that one, Sarah?

 **Shepherd, Sarah** 11:21

Four does not currently have the ability, no, to request or approve. No. Four, yeah, 4 is going to be a lot of the maybe related service providers. And if the district is an easy track and has that Medicaid module enabled, that that's where users are in permission group 4 oftentimes. SLP is

 **Hayes, Heather** 11:21

This work.

OK, to request.

Hello.



Shepherd, Sarah 11:43

Maybe codas, OTS.



Margaret Harriss 11:47

Okay. Okay.



Shepherd, Sarah 11:48

Mmh.



Hayes, Heather 11:55

Any other user groups that, before I kind of try to summarize, but any other user groups that you feel like need one of those two permissions?



Shepherd, Sarah 11:55

So can.



Hayes, Heather 12:14

So let me just recap what I heard and we can, and we'll make sure to put it all in the notes, but everyone feels comfortable with 2A being able to request by default. So we can make that adjustment. So anyone in that 2A will be able to request. They will only be able, they won't be able to approve if you wanted them to be able to do both, just leave them in group 2.

And then for three, we will add it to the menu so that if people have given individual staff that access, they would be able to do so. But if you decide not to, they would not have the permission to do that.

Jasper, that that is that I think that's in support of what I just said, so that that works. Okay, so that was the only question or use case that we had received via e-mail since our last meeting. I know because we brought up the notifications, I wanted to see if there were any other, notifications is another one that is easy to adjust or fix in various ways. So I wanted to see if there's anything.

outside of what we fixed last week that folks might be having challenges with or concerns with in terms of those compliance alerts or reminders or anything like that that you'd like to discuss.

 **Margaret Harriss** 13:36

Ah.

Can I find out that note section under the students? I want to say,
Let me see if I can if I can find it, but it's where staff can put the notes. Is it under
their permission or their personal information under the student info?

 **Shepherd, Sarah** 14:00

Enter.

Um...

Yeah, and it's under contact log now. So, so it's under that student info contact log.

 **Margaret Harriss** 14:15

So everything is okay, so does everybody have that access? Okay.

 **Shepherd, Sarah** 14:24

They do, yeah. It was under that personal info page and that wasn't giving enough
access across districts. So we did, we relocated the notes to that contact log.

 **Margaret Harriss** 14:34

Okay.

 **Shepherd, Sarah** 14:42

Yeah, good question.

 **Margaret Harriss** 14:42

Thank you.

 **Hayes, Heather** 14:45

Thanks, Margaret. Paige, got your hand up.

 **Paige Williams** 14:48

So in regards to the notifications, we have our principals, assistant principals and
district like superintendents and stuff under permission 5. Is there any way that we
can take the notifications off 5 and 5A?



Hayes, Heather 15:06

Would you want the same thing, just if they happen to be on a caseload for a specific student, still get the notification? Okay. Anyone else opposed to making that change for five and five days? Is there anyone that wants people in five to get notifications for all the students in their school?



Paige Williams 15:11

Yes, yeah, yeah, yeah.



Shepherd, Sarah 15:14

Mm-hmm.



Hayes, Heather 15:35

And then we'll get to the next one because I think that's a great idea. So everyone okay? Or anyone opposed? I'm just going to go with the opposition. Anyone opposed to limiting those 5 and 5A notifications to own caseload? Perfect. We can absolutely make that adjustment.



Shepherd, Sarah 15:55

People.



Hayes, Heather 15:57

Jasper, great question. So he is noting that 2 and 2A can only add notes if the student is on their caseload. So he'd like to see if everyone is open to widening this so that you don't have to be on the caseload. It could just be any student in their schools, including inactive students. Permission group 1A also cannot create notes for students that are inactive, which is affecting our office professionals. Okay, so let's start with the first half. Is anyone or a dialogue? Please comment. Let us know your thoughts. Would everyone be okay with opening up for 2 and 2A?



Shepherd, Sarah 16:24

Mhm.



Hayes, Heather 16:35

to be able to add notes for anyone in their schools.
Be helpful.



Margaret Harriss 16:43

I'm wondering why they would be adding notes to a student that is just vaguely in the district.



Hayes, Heather 16:53

Not on their caseload. Jasper, could you give a little bit more on the use case or what you're seeing in your district?



Margaret Harriss 16:56

Yeah.



Newkirk, Jasper 17:01

Yeah, I'm gonna try the best I can. I'm not the person who does it, but...



Howard, Michael 17:04

It.



Shepherd, Sarah 17:05

Yep.



Hayes, Heather 17:06

Yeah, sure.



Margaret Harriss 17:06

Yeah.



Newkirk, Jasper 17:07

Yeah, basically, our office professionals here will write down a note, say like, in an inactive thing, if another district from another state had requested that we send them

records, then they need to write that in on the student note there. That's kind of the main use case I've heard around.

 **Margaret Harriss** 17:18

Okay.

Got it.

Yeah, that makes sense. That makes sense.

I am not opposed.

 **Hayes, Heather** 17:36

Thank you, Margaret.

Others, other districts.

On the call.

Would you be in support of expanding that?

 **Paige Williams** 17:48

I'm in support.

 **Hayes, Heather** 17:50

Thank you, Paige.

Okay, I'm going to, if there's no opposition, we'll take that one down and we will get that updated for you as well. Thank you, Jasper. All right, next one from Paige. Can we discuss translation permissions? We did discuss a little bit last week, but I'll let you state your exact question and then we can talk further.

 **Paige Williams** 18:16

He.

So here we're noticing that under the document language section in 3.0 is where documents are able to be translated. So we use Synergy and that information is not importing over to 3.0. So it's blank for every student, which means the document translation button isn't there to be clicked.

And we as admins are the only one that can change that translation. So can that be opened up to staff to change the translation language?

 **Hayes, Heather** 18:55

Do you have specific use? Are you asking for all roles or specific um roles to be able to do that?

 **Paige Williams** 19:01

Maybe specific roles, roles, maybe the case managers. So that would be our group 3, maybe, maybe like two and three can do that.

 **Hayes, Heather** 19:13

Let's open that up. So that is definitely doable. So do folks want to chime in on your thoughts on whether or not you would like to do that?

 **Margaret Harriss** 19:25

Yeah, if I can take it off of my plate and give them the access to do it directly, yeah. I thought that that was the way that it was supposed to be set up in the beginning, is the teachers would be able to go in and update the language if need be. So.

 **Hayes, Heather** 19:48

See Jasper nodding. Anyone opposed to opening it up? So I'm just going to say for now, for the twos and three.

I don't know enough about 33A and 3B. Sarah, would it be all the threes?

 **Shepherd, Sarah** 20:03

Yeah, so the difference is there. That's what came to my mind. So just to clarify, so 2 and 2A, that makes perfect sense. Those are identical except for the IDT access. For 3, that's where the majority of case managers are. And then we have some differentiation because 3A, they don't have the ability to finalize documents. So they have the same permissions, but they can't finalize. And then your 3B has access to all students in the schools, not just their caseload. So I think, hopefully I didn't transition or transfer those 3A and 3B, but you get the point. That's how they're differentiated. So would all.

Three of those groups need the ability to add the student document language.

 **Paige Williams** 20:49

I'm, I was thinking more just three, not the 3A and 3B.



Shepherd, Sarah 20:52

Okay.

Okay.

Thanks, Paige.



Newkirk, Jasper 20:58

I agree with that.



Margaret Harriss 20:59

Yeah, because I'm thinking that case managers would, they wouldn't necessarily be in a 3A because they're going to need to finalize documents. So yeah, I would think 3.



Hayes, Heather 21:00

It.



Shepherd, Sarah 21:07

Mhm.



Hayes, Heather 21:13

Carrie, Carrie agrees. Thank you, Carrie.

Okay, so two, 2A and three.

Perfect.



Shepherd, Sarah 21:22

Got it.



Hayes, Heather 21:23

It's just rolling right through. See, we're going to make all these changes. You're going to be...

This is our happy group. What else can you think of that we could tweak, that we could adjust, that you're struggling with or having problems with? Oh, here's another one for Jasper. Okay.

So permission group 3, wanting access to the sped services and the related services pages, just read only, so that they don't have to go through the IEP to see those. I do

not see a reason that, I do not see a problem with that, Sarah, especially as view only. They can just see.

you know, the list of services easily. Do you have any other thoughts before we open it up for the group to discuss?



Shepherd, Sarah 22:08

Mmh.

No, I think view only is okay. I just want a little caveat there in terms of, you know, it's when they're finalizing records in 3.0 that that page really populates. So I just don't want folks to be misled once they even have view only. They could go to that page and not see data there.

they might not see data there if the student didn't have data migrated over or hasn't had a record created. So I just want to make sure that that's not alarming to them once they get that additional access.



Hayes, Heather 22:48

would still be, I think that's a good caveat and we can put that in the notes or training material, Sarah. But if they had dug through the IEP, they would see the same thing. So they are in sync. So I think that would be important to call out. So, but it will show them very quickly and easily that set of services.



Shepherd, Sarah 22:51

Ohh.

Mhm.

Yes, correct. Correct.

Mmh.

Yes.

Yeah, correct.



Hayes, Heather 23:07

I don't want to open a can of worms, but I'm also going to ask, I believe there is also that same, I will have to go back and check, as I say, this supplementary. I'm wondering if there is also that standard page for supplementary services, just so you had.



Shepherd, Sarah 23:20

No.



Hayes, Heather 23:23

all three.

So I might have to bring that one back around. But yeah, so let's open it up to the group. Again, comments, questions, or anyone opposed if we were to give group 3 view only permission to those kind of standalone services pages just for quicker, easier access to the list of services for a student.



Shepherd, Sarah 23:25

I'm going to look. OK.



Margaret Harriss 23:48

Can I ask where, where are we looking at those services? Where would they be at?



Shepherd, Sarah 23:54

I'm going to pull up my screen really quick because I think it would be easier if I show you. I totally understand. So I just I just clicked on a student's name, so I haven't gone anywhere really in the record, but it's right here under IEP information where you see the related services. We do have one for supplementary aids and answer to Heather's question.



Hayes, Heather 23:54

Absolutely. I think we can. Perfect. Thank you, Sarah.



Margaret Harriss 23:58

Okay.



Hayes, Heather 23:59

Absolutely.



Margaret Harriss 23:59

Yeah.

Mhm.



Hayes, Heather 24:13

Yes.



Shepherd, Sarah 24:14

and then special ed services.



Hayes, Heather 24:17

And if you click on one of those for us.



Margaret Harriss 24:18

Oh, so those aren't those aren't available right now.



Shepherd, Sarah 24:21

They are for some.



Hayes, Heather 24:22

Not to permission group 3.



Shepherd, Sarah 24:24

Yeah, not for group 3. And so I think what they ask is, and it makes sense to just give access to this as a view only. You're seeing this under my login. So of course, I could actually add something in here. Their view would literally just populate this data. They wouldn't be able to edit or change anything.



Margaret Harriss 24:40

Got it.



Shepherd, Sarah 24:43

Mhm.

So yeah.



Hayes, Heather 24:49

Um, Paige, can you clarify, you said not for group one. Do you mean you aren't seeing this as group one or you're not seeing a supplementary past group one?

 **Paige Williams** 24:57

No, me, I'm not seeing that drop-down as group one.

 **Hayes, Heather** 24:59

Yanos.

 **Paige Williams** 25:02

Like, mine doesn't look like that.

 **Shepherd, Sarah** 25:03

Okay.

 **Hayes, Heather** 25:03

So.

So I think we will double check that because I do think, it sounds like Sarah, you were thinking that one should have that edit access. Okay.

 **Shepherd, Sarah** 25:14

Yeah, I'm just gonna impersonate a one.

 **Paige Williams** 25:16

Yeah, we don't, we don't have access to that.

 **Shepherd, Sarah** 25:19

Just gonna impersonate someone here really quick, but, um, and pull up a student. Yeah, so one has special ed and related, they don't have supplementary.

 **Margaret Harriss** 25:35

Yeah, I think that's all I'm seeing as well.

 **Shepherd, Sarah** 25:36

Is that what you're saying?

Yeah, so this is, I'm impersonating now at permission group one and this is their choice bank right now.

 **Paige Williams** 25:50

Is that how it's supposed to be or should we have what you have?

 **Shepherd, Sarah** 25:54

Yeah, MIM is a permission group one, so this is what it should look like for anyone else that has access as a level one.

 **Paige Williams** 26:02

Okay, so the vote is for it to look the way yours look.

 **Hayes, Heather** 26:07

Sorry, so I guess now we have a couple things. So let's say the first one is, would you like us to add supplementary? Because right now you just have special ed and related. Would supplementary be helpful? Seeing nods. Anyone opposed? Cool. So we'll add supplementary for one. And then the request is

 **Shepherd, Sarah** 26:09

Two things.

 **Paige Williams** 26:20

Yes.

 **Shepherd, Sarah** 26:22

Ohh.

 **Hayes, Heather** 26:27

for three and potentially 4, because those are your OTs, your PTs, right? Add view only access for those three services pages, for groups three and four.

I don't really see a downside, but again, this is with like the groups.

But it says yes.

I don't know if support, well, wait, is support for school personnel, is that a separate section, Sarah, in the process?



Shepherd, Sarah 27:08

Supplementary aids, yeah, we don't have it as a separate one here. We don't have that option, no. It's just the supplementary aids and services related and special ed.



Hayes, Heather 27:09

On the sub, yeah.

Apologies, Carrie, we can't add that last one, but we can do all the other three, all of the other three.



Shepherd, Sarah 27:25

Uh-oh.

Yeah.



Hayes, Heather 27:32

We will, we will make that change as well.



Shepherd, Sarah 27:35

Okay.

Indoors.



Newkirk, Jasper 27:38

Can I ask a side question real quick?



Hayes, Heather 27:38

These.

Go ahead, absolutely, and then I'll get to Paige.



Newkirk, Jasper 27:41

Well, we're looking at the shared screen. The mastery criteria entry has always been blank for me. Is that...



Shepherd, Sarah 27:43

Yeah.

That makes sense. That might make sense. That would be for districts that have

progress track. So I don't know. Yeah, you probably just don't have that enabled. And yeah, so it may show up on your menu string and you might just have that message like you don't have access to that page. For example, it's for that progress track add-on.

 **Newkirk, Jasper** 27:51

Supposed to be the case.

Okay.

Aha.

Okay.

Okay, thank you.

 **Shepherd, Sarah** 28:13

Yeah, no worries.

 **Hayes, Heather** 28:15

And then Paige asked a question, are these dropdowns only for Medicaid information? No, these services pages should reflect any service information in the IEP. So again, as your users are starting to develop their IEPs in the system and putting services into the IEP process, they would also show up here. So basically it's just, it's the same information.

in two places. So it's the full IEP services list, just another view of it, if you will. So they could be Medicaid, they could be non-Medicaid services.

 **Shepherd, Sarah** 28:40

Mhm.

Mhm.

 **Teri Engelbrecht** 28:54

Yeah, that we were told in one of the meetings that those were only be viewed if you were had Medicaid ability of your district. And so that's why we're asking that, because we said when they were told not all the information data would be in those screens.



Shepherd, Sarah 29:00

Ohh.



Hayes, Heather 29:05

Check.



Shepherd, Sarah 29:09

Ohh.



Hayes, Heather 29:10

That's true. So this won't have all of the information that is in the IEP process. This is like a quick and dirty of the services and some of the high level, the sessions and the frequency. But that's kind of the extent of it. There are far more fields in the services section of the IEP process. So again, the reason

That's a great question. And let's make sure everyone understands. And we'll put this in the information that we have added this for really just a quick view of here are the services that your student has, as well as the frequency and durations. But that's it. So if you want more detailed information about these services, then you would need to go into the IEP process to find that.



Shepherd, Sarah 29:51

Ohh.



Hayes, Heather 29:51

Does that explanation help? And if we put that in to the guidance, would that be helpful for folks to know that difference?



Teri Engelbrecht 30:00

Yes, I think that would be helpful because we were told one thing and now we're being told something else, so that'd be great.



Paige Williams 30:00

Yes.



Hayes, Heather 30:05

Trying to be helpful, I think, and overly, like, if people want this page expanded, then there's, I don't see a downside, like I said, especially view only. And then they'll have the exact same information. It was probably just so we didn't want people editing, mainly editing this page, because you would be missing critical fields.



Shepherd, Sarah 30:10

Mhm.

Mmh.



Hayes, Heather 30:25

that you need in your IEP. But as a view, I don't have any concerns of sharing it if you only.



Paige Williams 30:31

Can I ask a question? Who, what permission group sees this page to be able to edit it?

Like I know I can see it and I can probably go in and edit it, but what other permission group can edit this page?



Hayes, Heather 30:40

Hello.



Shepherd, Sarah 30:47

So I have to think for a second, for districts that have Medicaid enabled, right, they have that easy track access, I believe that this is turned on for their providers. So that would be that level.

for access for specific easy track districts. I'm going to check my notes, but I'm certain that when it was initially rolled out, that was the intent for them to access that page as well.



Paige Williams 31:13

F.

Okay, so this is the easy track service logging add-on product. That's what this section is.



Shepherd, Sarah 31:23

Mhm.

This isn't where they, this isn't really where they log services, but yes, they could potentially add a service in for logging specifically. We don't see that very often. It happens more so in this first transition year. So we wanted them to have that ability.

But to Heather's point, like I don't see any downside.

for other folks to be able to view this page. Yeah, they just wouldn't have access to editing yet.



Paige Williams 31:50

Okay.

Okay.



Shepherd, Sarah 31:53

Mhm.

So I put down 1 and 1A to make sure we add the supplementary, and then for all three, special ed related and supplementary aids and services, permission 3 and 4.

Did I note that correctly?

For the change.



Hayes, Heather 32:14

Three and four, but three and four would be view only. And we'll double check on the four Medicaid and seeing if that is added.



Shepherd, Sarah 32:16

View only, yeah.

Yes.

Correct.



Margaret Harriss 32:26

Well, I thought four was for the providers and wouldn't the providers be going into that page if they had to add a service?



Shepherd, Sarah 32:29

Mmh.



Margaret Harriss 32:37

We don't want them to remove their access.



Hayes, Heather 32:40

So good.



Shepherd, Sarah 32:43

Correct.



Hayes, Heather 32:44

We won't remove anything. If they already have that ability, we will leave it. I think adding it with additional edit access, I think the safeguard that we were trying to keep in place was again, making sure they go to the IEP process so that they enter all the information needed for the service, not just these couple fields. I think that's the that's the difference.



Shepherd, Sarah 33:03

Mmh.



Margaret Harriss 33:03

Yeah, yeah, no, I, I, I get that.



Hayes, Heather 33:08

We won't remove anything if they have it now. I don't want to panic people.



Shepherd, Sarah 33:11

Uh-uh.

No.



Hayes, Heather 33:15

Margaret has a question, Sarah, I don't know. We might, if you need to take this one

offline to look more into it, but the mastery criteria for an ESA with progress track is not seeing anything. So I don't know what should or should not be showing up there.

 **Margaret Harriss** 33:31

Yeah.

 **Shepherd, Sarah** 33:32

Oh, okay. Yeah, I do need to take that one and look just a little bit further. ESA, is that permission too for your district?

 **Margaret Harriss** 33:44

Well, I'm looking at it in permission 1A.

 **Shepherd, Sarah** 33:48

1A. Oh, okay.

 **Margaret Harriss** 33:49

And I'm not seeing anything.

 **Shepherd, Sarah** 33:51

Okay.

 **Margaret Harriss** 33:52

I believe I'm 1A. I'm either 1 or 1A. I don't remember which one I am.

 **Shepherd, Sarah** 33:57

Okay, gotcha.

I made a note of that. I can follow up with you even via e-mail, Martha. Yeah, to make sure.

 **Hayes, Heather** 34:03

Look.

Then Jasper did already confirm, you're quick, that four does have it. So.



Shepherd, Sarah 34:15

Oh, good. Okay. I thought so.



Hayes, Heather 34:17

Perfect, OK.

What else? Anything else you can think of?



Paige Williams 34:33

Can I ask a question about something that don't?



Margaret Harriss 34:34

What's the time frame on these changes? I'm sorry.



Paige Williams 34:39

That's okay, go ahead. Go ahead, it's fine.



Margaret Harriss 34:43

I was just saying, what's the time frame for these corrections to be made?



Shepherd, Sarah 34:50

And Heather, you tell me if there's anything you feel like we're going to need to spend a bit more time investigating. But for me, I think we could have these in place by end of day Monday.

Do you see that differently or anything that would take more time?



Hayes, Heather 35:04

No, I don't think so. I think we just want to make sure we get the communication out to the field so that they know of what is getting changed. And I don't know if that also means Sarah updating that overall permissions role matrix document as well.



Shepherd, Sarah 35:10

Mhm.

Yeah, we will.



Hayes, Heather 35:24

So yeah, so as long as we get some time just to make to make those updates and send them out, I think, yeah, end of day Monday should be fun.



Shepherd, Sarah 35:27

Mmh.

Who?

Yeah, yeah, we'll update the pages. We have a page in the admin manual that you all have seen that's all of the user permissions. And then the very next page is all of the notifications. So that summary of like what are those compliance messages that folks are getting. So where we're going to make an adjustment there for permission group 5 for your principal group, you'll see a change there as well. So we'll just put in a new admin updated manual.
manual with this change.



Hayes, Heather 36:01

And we'll also summarize the changes and send them out as well.



Shepherd, Sarah 36:05

Mhm.



Hayes, Heather 36:08

Paige, what was your question?



PW Paige Williams 36:12

It's not a permission question. It's kind of like a...

So 2.0 and 3.0 kind of don't communicate, and we kind of know that. So our 2.0 documents that have been transferred over,

They.

So when we run reports, everything isn't coming up on the report because there are no 3.0 timelines for the 2.0 documents. So it's almost like 2.0 is looking at, I mean, 3.0 is looking at the documents as if they were transferred documents from like another district.

that's not in the system. So do you all have a workaround for kind of our staff to get

those reports or for us to know like the students that have certain services and things like that to get them on the reports because they're not coming up on the report?



Shepherd, Sarah 37:12

Ohh.



Paige Williams 37:13

Yeah.



Shepherd, Sarah 37:14

I'm thinking, I'm thinking in my mind, because I know some of the districts that I've worked directly with on reports have pulled reports out of 2.0. So we kind of increased that admin access. So you all could pull reports again from 2.0, because of course the majority were just now into September, so we still know that the majority of compliant, legally completed documents, right, still kind of live in that 2.0 space before the new records are written. So in a lot of cases, they're getting their data



Paige Williams 37:44

Hey.



Shepherd, Sarah 37:53

there. And then as documents, of course, are finished in 3.0, then you'll see all of that pulled to the reports that are available there. If there's like a specific scenario you want me to kind of look into and give you specific report names, you can type that out in chat or just tell me.

a specific case you're trying to solve for, and I'd be happy to give you recommendations on that piece.



Paige Williams 38:14

OK.

I don't have any, not specific right now. I guess my director wanted to know all the students that were, that had mental health.



Shepherd, Sarah 38:21

Okay.

Mm.

 **Paige Williams** 38:30

specialist or something like that. I can't remember the name. But anyway, and I tried to run a report and that's not a drop down in 3.0, but it was in 2.0. So even trying to figure out what those students are being called in 3.0 was a little

 **Shepherd, Sarah** 38:33

Yep.

Mhm.

 **Hayes, Heather** 38:41

No.

 **Shepherd, Sarah** 38:49

Mm.

 **Paige Williams** 38:49

difficult to figure out. So that kind of talking is becoming a little difficult to find, you know, information like that. And I also got a message from a staff member who was trying to create like a minor document from a 2.0 IEP and they weren't able to

 **Shepherd, Sarah** 38:53

Yeah.

No honey.

 **Paige Williams** 39:08

kind of link it and move forward with the minor document because it was asking about something that was in the IEP that they needed to add, but it wasn't linking. So even to fix that issue, we didn't know how to link that information to the minor document.

 **Shepherd, Sarah** 39:27

Gotcha.

 **Paige Williams** 39:27

So it's just those Lincoln issues when trying to create new documents and new information in 3.0 from information that was in 2.0.

 **Shepherd, Sarah** 39:35

Mhm.

Sure.

Paige, maybe we can set up some time. I'd love to help you with both of those scenarios and just walk through them. Yeah, let me set some time for us to talk a little bit deeper into those.

 **Paige Williams** 39:44

Okay.

Okay.

Okay, thank you.

 **Shepherd, Sarah** 39:51

Yeah, of course.

 **Hayes, Heather** 40:02

So we'll open up any last thoughts, comments, questions, and then I'll pass it back over to you, Jennifer, for kind of our next steps.

All right, so I just, I will also say thank you all so much for being so collaborative and giving us very actionable things that we can change and fix in a day. Have those done for you by end of day Monday. I hope that these, I know they may feel like small tweaks, but I hope they're going to help alleviate some burdens and some some actions from your side. So, all right, I'll pass it over to you, Temper.

 **Meller, Jennifer** 40:38

Thanks, Heather and Sarah. So I think as of right now, we are not anticipating many more agenda items for next week's meeting, but we will leave it on the books and we are going to keep soliciting. We're going to keep looking at help desk tickets. other information that's coming in, you know, that might be connected to user permissions in particular and roles. All of you are still welcome to send us agenda

items. And then we can kind of decide next week what that focus of this meeting would look like. I think we're

As I said, we've made progress in this area. So that's a good thing. And so, Dana, I think we'll need to talk about some of the next steps on this group and, you know, how that might look as we evolve.

 **Dana Anderson** 41:33

Yeah, very good. Felt very agile and lots of great feedback and very responsive and implementing change. That's just wonderful.

 **Meller, Jennifer** 41:44

Well, thanks, everyone. Oh, sorry, go ahead, Terry. Sure.

 **Teri Engelbrecht** 41:45

I think, can I put one comment? I think this group was easier to work with because you brought it down to a smaller level and where we could see and actually make something happen where being on some of the other groups, it's so overwhelming. There's so much out there and there's no way to.

resolve something so nobody feels good at the end of the day. So if there's anything that you guys could do to make it and bring it down to a smaller level where we could have an action group like this and actually make something work, that would be appreciative.

 **Meller, Jennifer** 42:21

That is excellent feedback, Terry, and I think we have felt the same way, and it makes me think about the...

potentially breaking apart the other groups or somehow reorienting. I just don't think we have enough time with some really big topics and some of the other ones that I agree it made it easier on this one when we could. There were very discrete things that were kind of easier to grasp. There was the user guide.

you know, on the just how permissions worked. And so I think that's great feedback for us to keep reflecting on how to refine the other groups to feel like, like we are seeing that progress.

Yes, I think, Michaela, you are right. I think this was an easier tech solution versus there are some other more complicated practice questions and workflow that's not

just about technology, but workflow about process and practice that has nuances within each.

district. Yeah, that's a good point.

 **Michaela Clancy** 43:30

And again, I think it's a really good idea and I appreciate how well articulated that was. If you can break it, because ultimately, especially this morning, there's things that PCG has to make decisions about and move forward. And, you know, there was a lot of needing to process frustration, but if we break it down a little more of here's the true decision point.

And perhaps we had some back end conversations about what Washington practice is rather than be in that large group, right? Because I think we're spending a lot of time of that as well. That could be beneficial, but breaking it down, this is an easy meeting and has been the last two meetings and it's gone really well.

Like I, this is the most productive, this is the most, and it's the clearest pathway around a tech product. So the others are messy. And I agree that we've, I don't know that that's getting you where you need to go with the two other, being on all the committees for my ESD. I concur and I think we could get it to a tighter.

frame for the actual work you need to do. I could notice today you all are getting, you are not getting 10 items done, you're getting one. So just echoing and appreciating.

 **Meller, Jennifer** 44:44

Thanks, Michaela. I think, yeah, we are processing nonstop on the best ways to keep recalibrating the group, the size, the topic. And so, you know, we'll continue to brainstorm going into next week to rethink

how we could orient the other two groups. And then on this group, like I said, we'll keep it as, we'll keep it on the books. We will see, perhaps we repurpose some of this, perhaps, you know, this evolves into a different kind of group. We'll, you know, we'll keep thinking about that. And

let you know as soon as we can about what makes the most, whether it makes the most sense from our recommendation at least.

Question Terry has about the right backs. So is Mike on? Mike, do you want to speak to that?

Mike's still there. I don't have the, I know there's a lot of moving pieces there, so I don't want to misspeak on anything.

 **Dana Anderson** 45:51

I can give a little update, maybe, Jennifer.

 **Howard, Michael** 45:51

Yeah, good.

 **Meller, Jennifer** 45:52

Or go, or Dana, you can, okay, yep.

 **Dana Anderson** 45:54

Yeah, I've been sitting in on a lot of those meetings with the group. So here's kind of a timeline update.

High level is the.

Group has been actively lots of progress being made. Sample file test runs in the last like 24 hours or so have been in some ways about like between a one or two error rates. So the write back runs that at least we can see directly in the Skyward environment. The journals are being created so folks can see

you know, what, if any, there's any gaps. So there's a lot of success that's moved forward on the right back. Next week, actually, we're going to be hosting on Wednesday. So this is way ahead of the curve. Some new messaging is going to come out on this early next week and going to be very, very agile on this. But on Wednesday, we're going to bring together all of the right back

districts to give an update and do some demonstration overviews of the write back process state, and then seek a cohort one write back group to have representation of districts that are in the non-skyward environment and then across the state, a cohort one in the skyward environment.

with actually a goal of beginning an initial right back on the 2nd of October to that cohort, and then having support teams ready to assist in any student information system modifications that need to be made for alignment purposes. So watch for a lot more communication coming out very urgently at the start of next week.

for that gathering and awareness session, and then those next steps for implementing and supporting districts in the right back journey.



Howard, Michael 47:50

Did that answer the questions that are out there, Terry?



Teri Engelbrecht 47:56

Yes, thank you. I'm just very anxious. And we're a synergy district, so we hear a lot about Skyward or cumulative, but we don't hear about the non, so.



Dana Anderson 48:07

Yeah, and there's been active work with non-Skyward districts as well in terms of the vetting and testing process.



Howard, Michael 48:14

Yes.



Teri Engelbrecht 48:16

Thank you.



Meller, Jennifer 48:22

Thanks, everyone. We appreciate your time. We're going to send the notes out and the PowerPoint, so you have that for your records. Those updates will also go on the WSUPC website and go out in the Friday newsletter, I think today. So we'll get our notes turned around quickly and get those over. I think Dennis is on point for that.



Dana Anderson 48:24

Okay.

Wow.



Meller, Jennifer 48:46

that. So stay tuned for that, that follow up and. And more information coming for next week's meeting.



Dana Anderson 48:54

Yep, Happy Dolly 925.

Yeah.



Meller, Jennifer 49:00

Thank you, Dana. On that note, have a good weekend, everyone.



Howard, Michael 49:03

Thanks, everyone.



Margaret Harriss 49:03

Bye bye.



Newkirk, Jasper 49:04

Next.



Shepherd, Sarah 49:06

Bye, everybody.



Teri Engelbrecht stopped transcription