

Workgroup #3: User Permissions and Roles Advisory Group

IEP Online 3.0

September 25, 2026



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CONSULTING GROUP

Solutions that Matter

Agenda

Updates & Clarification

Questions and Next Steps



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.



Workgroup Participants

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Update: User Roles & Permissions Meeting

The Advisory Group reviewed three permission decision points on 9/18:

1. **Inactive-student access:** read-only access supported for Groups 3 and 3B, mixed views on Groups 4 and 4A, and no expansion to Groups 5 or 6.
2. **Reports access:** unanimous support for restoring reports for Groups 2 through 6 via My Reports, with results still limited by each user's permissions.
3. **Student transfers: majority support for an optional Permission Group 2A that separates IDT authority from other Group 2 functions.**
 - Next steps: define request and approval roles, add safeguards, and confirm adoption is optional.



Clarification on Permission 2A

Permission Group 2A is a duplication of Group 2 without the access to the Student Transfer (IDT) process. The original Group 2 would retain all existing IDT permissions (both request and approve).

Clarification Requested: Can we assign a user the ability to request a student transfer, but not approve a transfer?

Answer: Yes, we could give a user in permission group 2A the ability to request transfers but not approve transfers. This would be requested for each individual user via Zendesk.

☐ Messages	☐ Documents	☐ User Types	☐ Custom Help	☐ History
☐ Custom Data	☐ Reports	☐ User Type Assign	☐ User Type Impersonate	☐ Local Config
☐ Config Menus	☐ View Scheduled Tasks	☐ Request Transfer	☐ Approve Transfer	☐ Impersonate Users
☐ Impersonate Parents				



Solutions that Matter