

SEAC Conformity Progress

IEP 3.0

Corrective actions, validation evidence, and workflow determinations

October 7, 2026 | Presented by PCG

Why We Are Gathering

- 01 Understand districts' current experiences, concerns, and priorities
- 02 Share how district feedback from work groups, office hours, support channels, and direct outreach shapes priorities and decision-making
- 03 Provide a transparent update on work completed, work underway, and upcoming milestones
- 04 Cover how work and milestones translate to user experience - workflow functionality, reporting, compliance, user permissions and administration
- 05 Clarify next steps and opportunities for continued district engagement



Meeting Sequence and Participation

Shared context, workstream evidence reviews, and recorded determinations

01 Implementation Context and the CAP

02 District Workflow Functionality

03 Reporting and Compliance Data

04 User Permissions, Roles, Lists, and Administration



Who You Will Hear From Today



J. Michael (Mike) Howard

Manager, Pacific Northwest



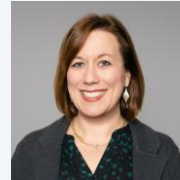
Kris Gregoire

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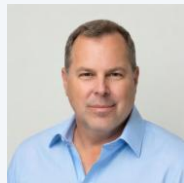
Sarah Shepherd

Manager, Business Implementation



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Reviewing How We Arrived Here Today

Key events leading to today's conformance meeting

- 2022 – 2023** ● **Districts voice need to enhance 2.0**
PCG and WSIPC explore enhanced 2.0 functionality in response to district needs
- EARLY 2023** ● **Necessity for transition becomes apparent**
To enhance functionality, PCG and WSIPC agree districts must transition away from 2.0.
- 2023 – 2025** ● **3.0 transition begins**
PCG announces 3.0 in 2023, introduces it in 2024 and demonstrates it in 2025.
- DEC 3, 2025** ● **Cohort 1 goes live**
The first cohort begins using 3.0.
- FEB – AUG 2026** ● **Cohort 2 prepares and goes live**
Training begins in February. Pilot migration: June 29. Go-live: August 3.
- SEP 2026** ● **PCG reorganized its response**
District workgroups, expanded support and issue triage are underway.
- SEP 17, 2026** ● **WSIPC issues formal notice**
The Board invokes Section 1.5 and identifies non-conformance concerns.
- SEP 23, 2026** ● **PCG submits the Corrective Action Plan**
The response brings remediation into a coordinated recovery program.
- OCT 7, 2026** ● **Conformance progress review**
Review evidence and open items



Implementation Context and the Corrective Action Plan

District impact and implementation learning, followed by the CAP's scope and evidence requirements

Implementation Learning and Recovery Changes

Learning already acknowledged and changes described in the CAP

WHAT WE LEARNED

Readiness for district work

PCG underestimated the scale and operational impact of the summer migration issues.

Support through implementation

District needs require targeted support beyond broad statewide training.

HOW RECOVERY RESPONDS

Require PCG testing and representative district validation before closure.

Use role-based sessions, office hours, and district-specific support informed by feedback.

Issue-specific root causes require evidence through the CAP validation process.



Why the CAP Has Three Corrective-Action Areas

The September 17 notice named three categories. The September 23 CAP organizes the response.

Identified concerns	CAP workstreams	Advisory workgroups
 District workflow Daily operations and required workflows became harder.	→ Workflow corrections Improve usability and validate end-to-end district tasks.	#1 Workflow, Improvements, and Training
 Reporting and compliance Districts lacked dependable reports and compliance data.	→ Reporting corrections Validate data accuracy, reports, and business rules.	#2 Reporting, Lists, and Compliance
 Permissions and administration Access and configuration did not fit district operations.	→ Access corrections Review roles, lists, and configuration with district users.	#3 User Permissions and Roles

District feedback informed the response before the notice.
The CAP consolidates commitments, milestones, and validation.

What Each District Workgroup Covers

Group 1	Group 2	Group 3
Workflow, Improvements, and Training	Reporting, Lists, and Compliance	User Permissions and Roles
FOCUS Daily district workflows, usability, guidance, and training	FOCUS Reporting accuracy, compliance data, and system lists	FOCUS Access, configuration, and administrative control
EXAMPLES IN REVIEW • Evaluation data into a draft IEP • Consent finalized outside of Eligibility • IEP Meeting Date as a compliance event	EXAMPLES IN REVIEW • Safety Net report fields • Service and Medicaid lists • Write-back file review	EXAMPLES IN REVIEW • Role and permission matrix • Expanded permission groups • District administrative scenarios

Weekly meetings

District input informs PCG decisions and validation.

Service lists remain in the CAP permissions area, with review through Workgroup 2.



How District Input Becomes Recovery Priorities

District experience and support patterns inform decisions, with follow-up on unresolved concerns.

IDENTIFY	REVIEW	DECIDE	FOLLOW UP
Recurring district barriers • Review Zendesk patterns and operational impact • Group concerns by workflow, reporting, data, and access • Use district examples to clarify the problem	Workgroups test the response • Validate severity and statewide relevance • Discuss proposed changes and local variation • Record differing views and unresolved needs	PCG weighs the evidence • Distinguish defects, workflow changes, and training needs • Use impact and compliance risk to set priorities • Seek WSIPC and OSPI input on requirements	Make decisions visible • Share weekly updates and expected timelines • Coordinate messaging and topic sessions with WSIPC • Return open questions for further district review

How District Feedback Shapes Corrections

Examples documented in the CAP, with validation required before closure

SERVICE LISTS (PA-01)

What the review identified

District list needs vary across workflows, billing, and reporting.

How PCG is responding

Update service lists using district feedback, with review through Workgroup 2.

Validation required

Districts confirm lists and administrative processes support required work.

SAFETY NET REPORT (RC-02)

What the review identified

Workgroups reviewed the report. The OSPI comparison identified missing fields.

How PCG is responding

Add the three remaining fields and track each requirement through testing.

Validation required

Districts confirm required fields are present, accurate, and usable.

CAP commitments and review activity shown here do not establish completed validation.

Evidence Required to Close Corrective Actions

01

**Define & Validate
(Gates 1–2)**

Document the gap, impact, severity, and scope. Validate the root cause with evidence.

02

**Fix & PCG Testing
(Gates 3–4)**

PCG develops the correction and completes functional and regression testing before district validation.

03

**Districts Validate
(Gate 5)**

District users validate operational fit in representative scenarios after PCG quality testing.

04

**Review & Formal
Closure (Gates 6–7)**

WSIPC and SEAC review evidence. Recovery governance accepts closure and the treatment of workarounds.

Today's review

Assess remediation and validation evidence.
Record gaps against agreed acceptance criteria.

Workstream 1

District Workflow Functionality

Required district tasks, workflow corrections, and training support, with evidence and remaining requirements for conformity

DW – 00 | District Workflow Functionality and Process Gaps

Related to the Corrective Action

Description of the Corrective Action:

Workflow and usability gaps require coordinated prioritization, documentation, remediation, and district validation across the full user experience.

What the workgroup identified at the outset:

Prioritize complete, accurate system-generated documentation to ensure districts maintain compliance standards.

What PCG accomplished:

Continuous defect resolution of workflows impacted by system-generated documentation.

Why it matters to the district:

Accurate documentation supports district compliance.

Beyond the Corrective Action

What we heard from tickets/advisories:

System-generated documentation was not functioning as intended.

What PCG accomplished:

Deployed resolution for 17 out of 27 workflow-related items reported.

What PCG will do:

Complete the remaining 10 workflow-related items reported and provide continuous monitoring for stabilization.

Why it matters to the end-user:

Reduce rework, provide confidence in system-generated documents.

Reliable documentation reduces rework and supports compliance.

DW – 01 | Evaluation to IEP Data Flow

Related to the Corrective Action

Description of the Corrective Action:

The current workflow prevents evaluation data transfer to a new draft IEP until the evaluation is finalized, although evaluation and IEP meetings may occur together

What the workgroup identified at the outset:

Decisions made during the evaluation process must align to the options available in drafting IEP services and performance levels for students.

What PCG accomplished:

Gap analysis, scope definition and technical specification.

Why it matters to the district:

Alignment of draft evaluation and IEP documentation for provision to team members and parents.

Beyond the Corrective Action

What we heard from tickets/advisories:

Limiting selections for IEP service provision when drafting an evaluation is causing disruption and unintended increases in workload.

What PCG accomplished:

Full gap analysis for the proposed solution (data promotion), which resulted in an adjusted resolution pathway.

What PCG will do:

Complete the technical specifications, test, and deploy solution.

Why it matters to the end-user:

Clear and concise workflow for evaluation and IEP drafting with less added workload.

Aligned evaluations and IEPs simplify service planning.

DW – 02 | Consent Finalization Barrier

Related to the Corrective Action

Description of the Corrective Action:

Consent finalization is technically coupled to finalization of the related Eligibility record.

What the workgroup identified at the outset:

This issue is specific to Reevaluation and Assessment Revision processes. Resolution must align contact attempts, parental response, and consent timeline tracking.

What PCG accomplished:

Gap analysis, scope definition and technical specification. Development work in process.

Why it matters to the district:

Clearer consent records and timeline oversight.

Beyond the Corrective Action

What we heard from tickets/advisories:

Users require the ability to finalize the consent early in the Reevaluation and Assessment Revision processes in addition to recording contact attempts and parental response.

What PCG accomplished:

In final testing of parental response fields added to the consent page. Technical specifications written for finalization of consent document and timeline tracking report.

What PCG will do:

Complete the final phase to deploy added functionality to finalize and report for tracking timelines.

Why it matters to the end-user:

Finalize consent early and track deadlines.

Earlier consent finalization with clearer deadline tracking.

DW – 03 | IEP Meeting Date Tracking

Related to the Corrective Action

Description of the Corrective Action:

The data model and compliance event framework do not currently capture IEP Meeting Date as a distinct event from IEP Start Date and End Date.

What the workgroup identified at the outset:

IEP Meeting Date is entered in the IEP process and accurately prints to the IEP documentation. Compliance timeline tracking is needed for the IEP Meeting Date.

What PCG accomplished:

Gap analysis, scope definition and technical specification. Development work in process.

Why it matters to the district:

Compliance, Reporting and Data Accuracy.

Beyond the Corrective Action

What we heard from tickets/advisories:

IEP compliance monitoring requires tracking of both the IEP Meeting date and IEP Start and End dates.

What PCG accomplished:

Technical specification is complete and development work is in progress.

What PCG will do:

Complete the development, testing and deployment; adding timeline tracking for IEP Meeting date.

Why it matters to the end-user:

Distinct and clear tracking of IEP deadlines.

Distinct meeting date tracking supports IEP compliance.

Workstream 2

Reporting, Lists and Compliance Data

Reporting access, writeback reliability, and Safety Net requirements, with validation evidence and unresolved gaps

RC – 00 | Historical Progress Report Data

Related to the Corrective Action

Description of the Corrective Action:

Some required reporting and historical data is not available in 3.0 Due to type and functionality in 2.0

What the workgroup identified at the outset:

Workaround is not as ideal state, but functional

What PCG accomplished:

Administrative access to 2.0 custom reports has been expanded through 2027, and PCG continues to provide extracts to support district workflows

Why it matters to the district:

Advancing IEP's in 3.0

Beyond the Corrective Action

What we heard from tickets/advisories:

Access to progress-report and updated historical data not available through a single validated 3.0 reporting process

What PCG accomplished:

Extended administrative access to 2.0 to run custom (unpublished) report for historical information. PCG also provided districts with an extracted file of the progress report data to simplify the process

What PCG will do:

We continue to exploring data field to import the data to have it within 3.0

Why it matters to the end-user:

Progress report data is critical in advancing IEP's and for compliance

Districts now have access to progress report data through 2.0 access and extract file

RC – 01 | Write-back Automation

Related to the Corrective Action

Description of the Corrective Action:

Required write-back data originate across 2.0 and 3.0, and automated output must account for field constraints, dependencies, and new start-of-year scenarios.

What the workgroup identified at the outset:

Writeback file continued to have missing information and data mapped from 2.0 misaligned

What PCG accomplished:

Established a voluntary, district-supported pilot to validate writeback results against local records and SIS processing outcomes before broader activation. Changed the Skyward pilot approach so files are tested in replicated production databases, not live production databases.

Why it matters to the district:

Impacts funding and resource management

Beyond the Corrective Action

What we heard from tickets/advisories:

Writeback remains paused while validation continues—manual writeback process implemented

What PCG accomplished:

Corrected migrated-data representation, missing student-record data, and writeback extract logic while protecting work already completed in 3.0 and district SIS environments. Conducted regression testing across approx 140,000 records, supplemented by rules, scenario, and integration testing.

What PCG will do:

Broader activation will be based on documented pilot results and district validation, rather than the target date alone.

Why it matters to the end-user:

Writeback is critical to funding and making sure this is trustable and accurate is a top priority

Writeback automation is being piloted across districts

RC – 02 | Safety Net Report Transfer Fields

Related to the Corrective Action

Description of the Corrective Action:

The Safety Net report recreated from 2.0 does not yet include all fields identified in the OSPI reporting comparison.

What the workgroup identified at the outset:

The Safety Net report lacked three fields identified in the reporting comparison

What PCG accomplished:

Add the three remaining fields, complete requirements traceability, rerun UAT and regression testing, and obtain workgroup and district validation.

Why it matters to the district:

Impacts funding and resource management

Beyond the Corrective Action

What we heard from tickets/advisories:

Safety Net report was reviewed by the district workgroups and confirmed content supported what is needed.

What PCG accomplished:

Complete field-by-field comparison to OSPI requirements; test field population, calculations, filters, exports, and regression impacts.

What PCG will do:

Report created that contains field for all fields requested in OSPI reporting.

Why it matters to the end-user:

Safety Net reporting is critical to funding and making sure this is trustable and accurate is a top priority

Report is in development and following testing will be released

PA – 01 | Service List Management

Related to the Corrective Action

Description of the Corrective Action:

District configuration needs and service-list requirements vary, and the current list-management model must be reconciled with workflow, permission, billing, and reporting needs.

What the workgroup identified at the outset:

Agreement for each ESD to review the current set of services lists and request 'critical' items to be added by PCG bi-weekly

What PCG accomplished:

Added all critical items received by the district/ESD representatives over the past weeks. Continuing to add any critical items requested.

Why it matters to the district:

Accurate Service Delivery, Staffing, and Compliance

Beyond the Corrective Action

What we heard from tickets/advisories:

Additional options are needed to allow for district customization, specifically IEP accommodations and modifications. The current list of state/district tests is not all-inclusive and needs further refinement.

What PCG accomplished:

Action planning for adding custom IEP accommodations and modifications.

What PCG will do:

Retain standard selections for IEP accommodations and modifications and add the ability to enter custom data. Manage updates to align to downstream reporting and data management.

Why it matters to the end-user:

Customization for individualized student supports

Expanded service options support individualized student needs.



Workstream 3

User Permissions, Roles and Administration

District access and configuration, including permission changes, list requirements, and remaining administrative needs

PA – 02 | Roles and Permission Groups

Related to the Corrective Action

Description of the Corrective Action:

Existing permission groups and role definitions did not fully reflect all district responsibilities, workflow patterns, confidentiality needs, and administrative scenarios.

What the workgroup identified at the outset:

A priority list of updates needed to various user roles to better align with workflows and district needs.

What PCG accomplished:

Focused on key adjustments to accessing inactive student records, completing student transfers, secure report access and streamlining compliance notifications.

Why it matters to the district:

Security Concerns, Operational and Role Impacts.

Beyond the Corrective Action

What we heard from tickets/advisories:

User permission concerns have stabilized significantly. We continue to monitor and remain focused on supporting districts user access.

What PCG accomplished:

Expanded and refined permissions across 7 key areas (Inactive Students, IDTs, Compliance Notifications, Translation, Reports, Contact Log, and Service pages)

What PCG will do:

Monitor and respond to requests for refinement of current permissions or action considerations for additional permissions needed.

Why it matters to the end-user:

System access aligns with the users' role.

An advisory group member said the User Permissions group had “gone really well and offered the clearest pathway for making progress on the technology.”

Workstream

Determinations and Follow-Up

Recorded decisions, remaining requirements, and dates for follow-up

Corrective-Action Commitments and Target Dates

The CAP's corrective commitments by workstream and issue ID, with target dates and development status.

CAP area	ID	Corrective commitment	Conformity status
Workflow	DW-02	Consent outside Eligibility	70%
Workflow	DW-01	Evaluation data into a draft IEP	25%
Workflow	DW-03	Distinct IEP Meeting Date event	75%
Workflow	DW-00	Workflow and usability corrections	50%
Reporting	RC-00	Progress reports and historical data	75%
Reporting	RC-01	Write-back automation	75%
Reporting	RC-02	Remaining Safety Net report fields	60%
Permissions	PA-01	Service list management	95%
Permissions	PA-02	Roles and permission groups	95%

Closing and Next Steps



State purpose of meeting and where we are

- We went through the identified areas of nonconformity and each item specific to the CAP.
- Today's meeting was an opportunity to provide updates and answer your questions.



What you can expect from us/our commitments

- We will drive this to conclusion.
- We will request a follow up meeting to determine conformance.
- We will keep the workgroups going.



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Solutions that Matter