

Workgroup #1: Workflow, Improvements, and Training Advisory Group

Washington 3.0

October 16, 2026



PUBLIC[™]
CONSULTING GROUP

Solutions that Matter

Agenda

❖ Updates

❖ Discussion Items



Workgroup Scope and Connections

Group 1

Workflow, Improvements, and Training

FOCUS

Daily district workflows, usability, guidance, and training

EXAMPLE TOPICS

- Evaluation data into a draft IEP
- Consent finalized outside of Eligibility
- IEP Meeting Date as a compliance event

Group 2

Reporting, Lists, and Compliance

FOCUS

Reporting accuracy, compliance data, and system lists

EXAMPLE TOPICS

- Safety Net report fields
- Service and Medicaid lists
- Write-back file review

Group 3

User Permissions and Roles

FOCUS

Access, configuration, and administrative control

EXAMPLE TOPICS

- Role and permission matrix
- Expanded permission groups
- District administrative scenarios

Shared context

Workgroup roles and connections



Updates From Last Week

October 9 Meeting Recap:

- **Post-secondary goals:** Migrated 2.0 transition goals trigger errors on the IEP Goals page. The resolution is to clear them from the migrated goals table, with access updated on October 13.
- **Custom modifications and supports:** Discussed adding type-in fields while retaining current selections. Confirm whether both Modifications and Supports for School Personnel need custom fields. PCG will move forward with this enhancement, timeline TBD.
- **Testing accommodations:** Districts reported missing options, including WIDA alternate assessment items. PCG is making updates to add WIDA items and scheduling meeting with Sue Ann Bube to review all testing accommodations.
- **Data migration guidance:** Reviewed when to delete migrated data and when to enter missing information, including Assessment Revision > Deliberations. The next step is clear, actionable guidance for district users.



Status Review

Critical/blocker items released last night (10/15) and currently being validated by PCG on production today:

- **IDEA Eligibility:** Age-Appropriate Transition Assessment Area – update so the correct ROC messages display for the Age-Appropriate Transition evaluation area
- **IEP:** Explanation for Alternate Assessment Field Printing on Document – update so the text field for Explanation for Alternate Assessment prints on the testing page of the IEP PDF
- **Minor Record: Manifestation** – update workflow and remove ROC, allowing creation of the manifestation document for both IDEA or 504 processes.
- **Minor Record: FBA** – Consent Document – update so the district name correctly displays on the Consent page of the FBA
- **Minor Record: Prior Notice** – Prior Notice Document – update the language so the correct meeting title appears on the PDF
- **Release of Records Document:** Add Student Signature – update to add student signature line



Status Review

Additional items released last night (10/15) and currently being validated by PCG on production today:

- **Referral:** Special Education Referral Document - update to resolve typos
- **IDEA Eligibility:** Prior Notice Date Field – update so when the initiation date field is blank, the correct ROC message displays
- **IDEA Eligibility:** Reevaluation Notification/Consent Document – update to resolve typos
- **IDEA Eligibility:** Final Document/Event Name – update so when an Eligibility record is finalized, the hyperlink name on the Student History page displays the correct title



Status Review

Priority Items in Development and Targeted for Release in the Next 1-2 Weeks:

- **Caseload Report (IEP Services with Location):** Adding the additional fields needed for Safety Net requirements
- **IEP:** Information entered within the Transition Plan is missing or incomplete when the document is generated
- **Skeletal Records:** Adding Related and SAS fields to the Skeletal Records page
- **IEP Meeting Compliance:** Adding an additional IEP Meeting compliance symbol and timeline tracking
- **Consent for Reevaluation/Revision:** Moving creation of the Consent to Evaluate document to the first step in the process, along with the ability to document the parent response and see the calculated projected due date
- **Testing Accommodations Report:** Adding the Assessment Name into this report



Eligibility and IEP Linkages

Current state: Areas and services must have identical names in Eligibility and the IEP to be available for selection in the IEP.

- Challenges include data migration and mapping, list consolidation, and restrictions on using the same service name across categories.

Proposed solution: Allow selection from the full services list. Add a Rule of Completion to confirm that every IEP area and service is present in Eligibility before finalizing the IEP.

- Preserves the compliance check while supporting concurrent Eligibility and IEP drafting, as well as mapping across naming conventions.



Services

Proposed action: PCG is preparing a consolidated file that will list the full, original list of services (by category) from 2.0 for each district and the specific service name that it was mapped to and migrated as into 3.0

- Do districts believe this information will be helpful?



Services

Proposed action: Add a ‘View Only’ field to the IEP: Services page that would display the exact service names from the most recent finalized IEP in 2.0 (un-crosswalked). This field would not print on future IEPs, it would be for reference purposes only. The field would be removed next summer.

- Do districts believe this would be helpful?

▼ Setting 1

[ADD SERVICE](#)

Total minutes per week of building instructional time available for this student (excluding lunch)

1950

Total minutes served in Special Education setting

0

% of time spent in General Education setting

100.00%

Recommendation

80% - 100% in General Education

Dates range of Setting One

10/01/2026 - 09/30/2027

Concurrent ↑

Location ↓

Service ↓

Frequency ↓

Minutes ↓

Delete ↓

☐

General Education

[Academics](#)

30 Minute(s) / 1 Times per Week

30



Previous

1

Next

Services Listed on the Latest IEP in 2.0:

Reading – Basic
Math – Problem Solving
Occupational Therapy



Accommodations and Testing Pages

Current state: Users can add “Testing” accommodations on the “Accommodations” page.

Add Accommodation

Type

Classroom

Custom Classroom

Testing

Name

(Required)

Frequency

(Required)

mm/dd/yyyy

(Required)

mm/dd/yyyy

(Required)

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

(Required)

SAVE

SAVE AND ADD ANOTHER

Users must also select applicable accommodations for each state/district test on the “Testing” page.

Testing - Current Grade				
Participating in Tests				
Yes				
Test Name	Not Participating	Participating	Participating with Accommodations	Add Accommodations
District Wide Assessments Grade 6	☐	☐	☒	+



Accommodations and Testing Pages

Current state: Users can add “Testing” accommodations on the “Accommodations” page. They must also select applicable accommodations for each test on the “Testing” page.

- Challenge: Users are unsure which page supports accurate assessment reporting and whether they must enter testing accommodations on both pages.

Proposed options: Rename the category “Classroom Testing” to distinguish it from state and district test accommodations on the “Testing” page.



Additional Topics Needing More Information

- Course of Study/Post-Secondary Updates
 - The course of study section appears to match the structure used in version 2.0.
 - Can you share specific examples of issues with this section and what you'd like to improve?

Demographic GT Enrollment Plan

Student Roster Find Student Print Undo Save

Course Of Study

☐ Will the student participate in Post 12th grade studies? If yes, then check the checkbox.

Freshman

- Academic Instruction and Related Services
- Development of Employment
- Personal Management
- Community Experiences
- "Daily Living Skills for Independence (Source: LCCE, Donn E. Brolin, 1992)"
- Grade Completed

Sophomore

- Academic Instruction and Related Services
- Development of Employment
- Personal Management
- Community Experiences
- "Daily Living Skills for Independence (Source: LCCE, Donn E. Brolin, 1992)"
- Grade Completed

Junior

- Academic Instruction and Related Services
- Development of Employment
- Personal Management
- Community Experiences
- "Daily Living Skills for Independence (Source: LCCE, Donn E. Brolin, 1992)"
- Grade Completed

Senior

- Academic Instruction and Related Services
- Development of Employment
- Personal Management
- Community Experiences
- "Daily Living Skills for Independence (Source: LCCE, Donn E. Brolin, 1992)"
- Grade Completed

Transition Courses

- ☐ Reading
- ☐ Math
- ☐ Written Expression
- ☐ Functional Academics
- ☐ PT
- ☐ OT
- ☐ SLP
- ☐ Other

Other

ABC Cancel Save

Course of Study

Secondary

Name Edit

Freshman

Sophomore

Junior

Senior

☐ The student will participate in Post 12th grade studies

Community Experiences

Name Edit

- Community Experiences
- Daily and Independent Living Skills
- General Education Courses
- Grade Completed
- Graduation Pathway Options
- Personal Management Skills
- Special Education Courses
- Washington State Requirements

Transition Courses

- ☒ College/training visits
- ☒ Community Based Learning (CBL)
- ☐ Connect with Adult Agencies: DDD, DDA, DVR
- ☐ Obtain ID/Driver's License
- ☐ Other
- ☐ Participate in Age appropriate social activities
- ☐ Personal Safety/Pedestrian Skills

CANCEL SAVE





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