

MEETING INFORMATION

Date	Advisory Group
10/14/2026	<i>Reporting and Compliance</i>

Advisory Workgroup #2: Compliance and Reporting

- **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.
- Attendance: 13 district/state participants

Meeting Recap

Write-back Update

PCG reported that the write-back process was paused after the initial 3.0 file produced incomplete and unexpected results. Following a detailed review of reporting logic and student data, pilot testing began on October 7 with Centralia, Edmonds, Evergreen, LaCenter, Lake Washington, Rochester, Snohomish, Puyallup, Richland, NorthShore, Tacoma, and Bethel. The pilot has focused on missing decisions, interpreter services, NPA values, and consents. Most missing-decision records have been resolved in aggregate, but the second file had not yet been distributed because two updates were still being completed and tested. PCG plans to use pilot feedback to assess readiness, document remaining issues and risks, and make an informed recommendation before broader enablement. The target is to complete critical pilot remediation by October 23, with October 26, identified as a possible date for nightly write-back, subject to testing, district feedback, and timing considerations related to the November 1 count.

Advanced Reporting Group

PCG described Advanced Reporting as the 3.0 replacement for Flexible Reporting. The model includes trained Advanced Reporting Creators who can build and publish reports, and Advanced Reporting Users who can refresh, filter, run, and export existing reports. A statewide group of approximately 10–12 trained creators, representing a range of district roles, will work with the reporting subcommittee and PCG to develop reports that address shared needs and reduce duplicated effort. PCG plans to convene the creator group within the next week and provide an Advanced Reporting overview during office hours in early November. Districts may submit custom report needs through Zendesk and provide examples of the data, fields, filters, and uses that would help the group prioritize development.

Safety Net Report

PCG is enhancing the 3.0 Caseload Report with IEP Services and Location to support Safety Net reporting comparable to the 2.0 Caseload Supplementary Provider Report. Requested additions include team member name and title, Medicaid eligibility, last evaluation date, date of birth, IEP service start and end dates, and student ID. PCG confirmed that SSID is included and that the report already calculates total service minutes per week. Advisory members requested a development and deployment timeline, and PCG indicated that it would follow up. The reporting team is also working toward a consistent set of core student fields across reports, with report-specific fields added as needed.

Testing Accommodations Report

Districts need a report that identifies each assessment and its associated testing accommodations, comparable to the 2.0 Testing Accommodations Report. Participants also raised a related workflow concern: in 3.0, selecting participation with accommodations displays the full testing-accommodations list rather than only the accommodations associated with the selected test. PCG confirmed that the current testing accommodations are aligned with the referenced GTSA guidebook and that additional options, including WIDA accommodations, are under review. The team is also examining which system section supplies report data and whether accommodations can be filtered by assessment. The next session will include a broader overview of the 3.0 data and reporting ecosystem to clarify how information flows into available reports.

Referral and Initial Timeline Report(s)

PCG identified the Referral and Initial Timeline Report as a high-priority reporting need because 3.0 does not yet have an equivalent to the 2.0 report. The proposed report would track referral receipt and decision dates, consent and evaluation due dates, extensions, meeting and lock dates, timeliness, days late, and eligibility outcomes. Advisory members emphasized that districts use this information regularly to monitor compliance, review timeline accuracy, identify overdue work, and communicate with staff. PCG plans to pursue both a canned report and an Advanced Reporting solution and requested district feedback on frequency of use, additional fields, and how the report supports local practice.

The discussion reinforced the need to prioritize a small number of high-impact reports, clarify data sources and report-field accuracy, and communicate implementation timing. PCG will use district examples, Zendesk requests, pilot findings, and the reporting subcommittee to guide development. At the next working session, the group will review the three reporting avenues in 3.0, Student Search and Advanced Student Search, canned reports, and Advanced Reporting, and continue addressing report priorities and unresolved questions.