

Workgroup #3: User Permissions and Roles Advisory Group

IEP Online 3.0

October 2, 2026



PUBLIC[™]
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.



Updated User Permissions Reference Guide

The User Permissions Chart and list of Compliance Notifications by user group can be found in the Admin Manual on the 3.0 Dashboard.

- Date of last version is in the file name and referenced in the table of contents
- Link to the User Permission pages only is listed just below the Admin Manual. Created for you to easily share this information outside of the larger manual.

Resource InformationSAVE⋮

VideosGeneralIDEA504Minor RecordsAdminConnectMedicaidProgress Track

Del	Pos	File Type	Category	Date Uploaded	Uploaded By	File Name
☐	1	Admin	▼	10/02/2026	Emi Taylor	Admin Manual 3.0 - uploaded 10/2/26
☐	2	Admin	▼	10/02/2026	Emi Taylor	3.0 Permission Levels and Email Reminders 10.2.26.pdf
☐	3	Admin	▼	09/30/2026	Emi Taylor	3.0 HUB & Dashboard Tracker Links
☐	5	Admin	▼	10/02/2026	Emi Taylor	3.0 List Update (SDI, Services, Testing Accommodations, Modifications) updated 10.2.26



Update: User Roles & Permissions Meeting

- P1/1A - added Supplementary Aids & Services to IEP Info Menu
- P2A – added Request Transfers
- P2/2A – added access to notes for any student in assigned school(s)
- P2/2A/3 - can edit the document language
- P3 – Added Menu Option for Transfers (active only for individual users by request)
- P3 – Added Related, SDI and Supplementary Aids & Services to IEP Info Menu (view only)
- P5/5A – Changed Compliance Notifications to 'own caseload'



Topics for Discussion

What additional permissions related topics would the group like to discuss?



PCG Team Members

Mike Howard, Manager

Kris Gregoire, Consultant

Sarah Shepherd, Manager, Business Implementation

Dr. Jennifer Meller, Manager

Heather Hayes, Associate Manager

Dr. Steve LaBounty, Sr. Education Advisor

[Contact: MikeHoward@pcgus.com](mailto:MikeHoward@pcgus.com)





PUBLICTM
CONSULTING GROUP

Solutions that Matter