MEETING INFORMATION

Date	Advisory Group
10/09/2026	*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.
- Attendance:
    - Dana Anderson, Doreen Milburn, Sue Bube, Michaela Clancy, Analisa Ficklin, Laura Staley, Melody Vinson, Paige Williams, Ronelle Poe, Sunshine Pray, Sarah Lewman, Shannon Hitch, Tawni Barlow, Theresa Leahey Vashon, Julie Webster, Jessica Johnson

Meeting Topics

Updates from Last Week (slide 4)

- Advisory member asked about IEP modifications – there didn't seem to be customizable fields. Also raised issue with having to manually set dates for modifications, especially for students with 3-15 modifications. It's a lot of clicking. PCG clarified this is part of the next IEP record after migration.
    - Advisory member said I think this falls in the category of data mapping problems which are happening in pretty much every aspect of an IEP.
    - Advisory member said It is also very time consuming across multiple areas. I met with our High school staff this week for a work session, and they simply asked if we could do something about the numbers of clicking on the carrots, the tabs, etc.
    - Advisory member noted that reentering every start and end date is more than just clicks, it's increased data entry and risk to the manual items added to the document.
- Advisory member noted I also have multiple questions about the transition plans- I worked on this with our high school teams this week, and it is very time consuming and confusing for them- I see an upcoming slide but I am hopeful this is a resolution priority.
- Advisory member asked where are we with caseload reporting for ESAs?
    - PCG confirmed Yes, we will be tackling the caseload reporting during Wednesday's work group. However, the team is also doing individual follow up with districts on reporting. We can schedule a time specifically for you on that topic as well. Advisory member Ok, thank you. This deadline for us in Districts is causing a great deal of concern from my ESA staff, both functionally and from a CBA perspective. I would say this is an issue for all of us, so while I appreciate the individual focus I am here representing 6 districts for our ESD, and I need to be able to answer the issue and the resolution timeline for this report. I'll bring this issue to Wednesday.
- Advisory member asked Can you explain more about the refreshing aspect of merging 2.0 data to 3.0?
- Advisory member said We are at the deadline for our staff overage caseload calculations per our CBA and we need this report across the system to address their overage. This is a key priority for us and I know most of us have this language and current challenge with the reporting feature.
- Advisory member expressed concern with major data mapping issues. PCG acknowledged this was the first time hearing of the issue and requested additional information to clarify the issue for reconciliation.
- Advisory member asked Can we go back to the transition plan? That pages and pages of check boxes needs to GO.
- Advisory member asked Is there a system for our zen desk tracking we could discuss? I appreciate the information coming from the resolution process emails. We are all swimming in a sea of zen desk tickets and I am trying to communicate to our staff and then regionally what is the priority in our own resolutions and then what you have identified. Small district versus large district priorities can be different.

- Advisory member noted Also lots of different teams going on - can we be provided updates from SEAC and office hours in a brief, executive summary format? Some of us are small teams or in larger teams I imagine from my experience internal communication is a challenge.

Post-secondary Goals Update (slide 5)

- Advisory member noted Giving Admin Level 1 access to this issues is a huge help. This is an example of why we need more access to our data so we can trouble-shoot in house and not rely on Zendesk support.
- Advisory member noted Because this is a focus for OSPI audit and one of our Indicators for compliance risk in our state- this is very urgent in resolution in transition. I have a student specific correction in this area and need the IEP corrected as soon as possible that is due this month flagged for OSPI audit. I can follow up directly, and we have submitted multiple zen desk tickets for transition goals. Will the only way this fix works is to clear all previous data and reenter new data? I have a high school transition teacher I am side by side supporting for this who was very frustrated this week trying to resolve.
- Advisory member asked Can you clarify, is this the solution for the year? And do you have a sense of how long it takes our staff to work through the patch? I appreciate that you're giving control to districts to do the fix with transition goals. But want you to be conscious of whether this is a true fix to the problem, or additional burden on the district.
- Advisory member noted The IEP Team will have to re-enter the post secondary goals once you clear them from the IEP Information tab. Essentially our case managers are entering this information twice. But I appreciate the ability to clear the goals avoiding the need for a Zendesk ticket.
- Advisory member asked Why did we get the "Course of Study" check lists instead of just the narrative?
- Advisory member asked whether others are panicking about progress reporting. Other member noted Yes because none of the IPEs have been locked yet because it's so impossible to get them unlocked.
- Advisory member noted We have been advised by PCG not to finalize reevaluations or assessment revisions. We have finalized IEPs but the compliance review is very questionable given the scrambling of information in the finalized document. Another advisory member asked Do we know what the ramifications are for locking documents in 3.0? Another advisory member noted The lock/unlock issue- also a big one. Our level 1s need more ability to lock/unlock. The business rules are not working as designed because we can't allow teams to lock their own documents because of all these issues. If this can be escalated please.
- Advisory member noted And to build on the statement above, the fact that if we are able to un-finalize a document because of the faults within it, this mistaken document lives in the system forever, which presumably would be included (and confusing, misleading…) in a public records request or a review of records.
- Advisory member noted Also think about the inability to finalize with the writeback.
- Advisory member asked about how PCG is distinguishing between blocker vs. Enhancement in the solutions.
- Advisory member noted We have asked to have the COS turned off for our district. We attach an independent COS that is customized for our student. We would like the to be turned off in our district.
- Advisory member requested Progress reporting is one of the upcoming issues. We only report twice a year in our system. It is for us end of October and a pivitol compliance area. Please add if we can to agenda as soon as possible.

Custom Modifications and Accommodations (slide 6)

- Members agreed with the posed action from PCG.

Test Accommodations (slide 7)

- Advisory member asked Can you provide us a separate list of what is in the system today?
- Advisory member provided the following WIDA link to support PCG with mapping accommodations in the system: https://wida.wisc.edu/sites/default/files/resource/Accessibility-Accommodations-Manual.pdf
- Advisory member noted I agree about testing accommodations. With local control, we were able to clarify for our end users how to enter testing accommodations correctly so that we can pull the data and do the Tide entries efficiently. The local control allowed us to do this! This will be a huge workflow issue in the spring.
- Advisory member noted If Admin Level 1 had access to the list, we can clean it up as well. Please keep in mind all IDTs will not have the testing / accommodations. This is a common area where districts may be missing the testing requirements.

Next Meeting (slide 9; slide 8 was skipped due to running out of time)

- Advisory requested IDTs, transfer evals and IEPs to the topics list for the 10/16 meeting.

SYNTHESIZED MEETING TOPICS

1. Updates from Last Week

- The group reviewed work underway on consent and IEP meeting-date tracking, a type-in search for long service lists, the active IEP Services Description field, calendar-year contact-log filtering, revised referral recommendations, custom IEP modifications, ticket-resolution timelines, spell-check, testing accommodations, and service matrices.
- Members emphasized that migrated records and modification workflows require extensive manual entry, repeated date entry, and many clicks, increasing staff workload and the risk of data-entry errors.
- Additional concerns included data-mapping problems, transition-plan usability, urgent caseload reporting needs, visibility into ticket status and priority, and the need for concise cross-group updates.

2. Post-secondary Goals Update

- The group reviewed an error caused by secondary-transition goals migrated from 2.0 being treated as annual IEP goals in 3.0. The proposed resolution is to allow the migrated transition goals to be cleared from the goals table.
- Members welcomed the planned district administrator access as a way to address the issue locally, while stressing the urgency of transition compliance and audit timelines.
- Members also noted that clearing migrated goals requires teams to re-enter information, creating duplicate work, and asked whether this is an interim workaround or a lasting resolution.
- Related concerns included Course of Study checklists, progress reporting, document locking and unlocking, writeback dependencies, records retained after un-finalizing, and clearer distinctions between blockers and enhancements.

3. Custom Modifications and Supports for School Personnel

- The proposed improvement would retain existing selections while adding type-in fields for custom modifications and supports for school personnel on the IEP Accommodations page.
- Members agreed with adding custom-entry options in both sections so districts can document student-specific needs without losing current functionality.

4. IEP Test Accommodations

- The group reviewed reported gaps in the current testing-accommodations list, which was developed from the state's 2026–27 guidelines but may not include all assessment programs, including certain alternate-assessment items.
- Members requested a separate view of the accommodations currently available in the system and shared additional guidance to support comparison and mapping.
- Members emphasized that district-level control could improve list maintenance, end-user guidance, data extraction, and efficient entry into state testing systems, particularly ahead of spring testing.
- The group also noted that transfer records and IDTs may not include complete testing requirements, creating an additional compliance and workflow risk.

5. Review Data Migration Scenarios

- The group briefly addressed migrated-data challenges through the discussion of transition goals and related workload concerns, but the planned scenario review was not completed. That review was intended to examine temporary implementation-year issues created by data migrated from 2.0 to 3.0 and identify clear, concise, actionable guidance for district users.
- The topic will continue in a future session, with attention to the workload created by migrated data and the steps districts should take when records must be cleared, corrected, or supplemented.

6. Next Meeting Topics

- The next meeting agenda identifies progress reports, Course of Study and post-secondary updates, document locking and unlocking and Level 1 access, testing accommodations, and migrated-data workload. Members also requested discussion of transfer evaluations, IEPs, and IDTs.