MEETING INFORMATION

Date	Advisory Group
9/25/2026	*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.

Meeting Topics

Welcome and Introductions

PCG welcomed participants and reviewed the purpose, intended outcomes, and working approach for the Workflow, Improvements, and Training Advisory Group.

Advisory Group Purpose and Focus

The group reaffirmed its role in identifying barriers affecting district workflows, recommending functional and process improvements, and informing training and support resources. Participants emphasized the importance of distinguishing among system defects, workflow changes, and training needs so that each concern can be directed to the appropriate response.

Hearing Your Concerns

Advisory members described significant operational effects associated with the transition from IEP Online 2.0 to 3.0. Reported concerns included high volumes of support requests, limited ability for district-level users to correct records, challenges reactivating or verifying students, and repeated changes to established workflows. Members noted that these conditions are increasing staff workload, requiring manual workarounds, and affecting the timely completion of compliance-related tasks.

Members also raised concerns about student counts, federal reporting, Medicaid billing, amendments, behavior plans, and access to accurate reports. Some districts reported that data or workflow steps from the prior system were not consistently available in 3.0, creating additional manual work and uncertainty regarding documentation. Participants emphasized that the cumulative impact extends beyond individual technical issues and may continue even after specific defects are resolved.

Additional concerns included two-factor authentication, multiple required selections within workflows, batch printing limitations, the frequency and adequacy of Help Desk resolutions, and the difficulty of communicating rapidly changing guidance to staff. Members requested clearer timelines, more transparent status information, and greater confidence that the system can support required district compliance activities. They also asked for clarification regarding full data extraction, data security, and the rationale for transitioning from the prior system.

PCG clarified that security, accessibility, and compliance requirements were primary drivers of the system transition. PCG further explained that accessibility requirements are mandatory and committed to providing additional guidance regarding their application and implementation timeline. PCG also confirmed that a Medicaid billing workgroup will be established to address related concerns and identify potential solutions.

Consent to Reevaluate Workflow

PCG reviewed a proposed change to the consent-to-reevaluate workflow and sought input from advisory members. Members agreed that the underlying issue requires action, while expressing differing levels of support for the proposed solution and concern that it may not address the broader functionality needed to monitor consent, eligibility, and reevaluation timelines. Members also noted the importance of communicating any interim change clearly to district staff and avoiding characterization of the solution as having been approved by the advisory group.

Members also requested additional review of guardian contact terminology, the accuracy of due and received dates, document printing options, and the availability of compliance indicators. PCG confirmed that the current system does not include a compliance symbol and agreed to investigate the reported printing concern. PCG indicated that the consent and eligibility correction and associated reporting could require up to four weeks to resolve.

After considering the advisory members' input, PCG decided to proceed with the proposed course of action. PCG acknowledged that the change is an incremental solution rather than a resolution of all related workflow and compliance concerns and committed to continuing its problem-solving efforts with ongoing advisory input.

IEP Meeting Compliance Timelines

This topic was not discussed during the meeting; however, the information is being shared as an update on PCG's continued efforts to identify and implement solutions in real time based on the concerns and priorities raised. The system currently tracks compliance timelines for annual IEP Begin and End Dates but does not track the timeline between annual IEP Meeting Dates. To ensure that this required timeline is also monitored, PCG will develop an automatically generated second event when an IEP is finalized. This event will track compliance for the IEP Meeting Date, and a new compliance symbol will display alongside the existing indicators.

Next Meeting

PCG confirmed that the group will reconvene the following week. PCG will distribute the meeting notes and presentation materials and provide additional information in advance of the next session. The discussion will continue to focus on priority workflow, improvement, and training concerns, including items requiring further clarification and problem-solving.

Version 2.0

Meeting Topics

Welcome, Purpose, and Working Approach

PCG welcomed participants, reviewed the advisory group's purpose and intended outcomes, and reaffirmed the group's role in identifying workflow barriers, informing improvements, and shaping training and support resources.

District Experience and Priority Concerns

Advisory members shared examples of how the transition to IEP Online 3.0 is affecting district operations. Discussion addressed support volume, record correction and student verification, changes to established workflows, reporting and billing needs, document access, printing, authentication, and communication of updated guidance. Members emphasized the importance of clear timelines, status information, and solutions that support timely compliance activities while reducing manual work.

PCG explained that security, accessibility, and compliance requirements were key drivers of the transition and committed to providing further guidance on accessibility requirements and implementation timing. PCG also confirmed plans to establish a Medicaid billing workgroup and continue reviewing concerns raised by the advisory group.

Consent to Reevaluate Workflow

PCG reviewed a proposed change to the consent-to-reevaluate workflow and sought input from advisory members. Members agreed that the underlying issue requires action, while expressing differing levels of support for the proposed solution and concern that it may not address the broader functionality needed to monitor consent, eligibility, and reevaluation timelines. Members also noted the importance of communicating any interim change clearly to district staff and avoiding characterization of the solution as having been approved by the advisory group.

Members also requested additional review of guardian contact terminology, the accuracy of due and received dates, document printing options, and the availability of compliance indicators. PCG confirmed that the current system does not include a compliance symbol and agreed to investigate the reported printing concern. PCG indicated that the consent and eligibility correction and associated reporting would require additional development.

After considering the advisory members' input, PCG decided to proceed with the proposed course of action. PCG acknowledged that the change is an incremental solution rather than a resolution of all related workflow and compliance concerns and committed to continuing its problem-solving efforts with ongoing advisory input.

IEP Meeting Compliance Timeline Update

Although not discussed during the meeting, PCG shared an update on work responding to identified priorities. PCG will develop an automatically generated event to track the interval between annual IEP Meeting Dates and display a related compliance indicator alongside existing timeline indicators.

Next Meeting

The group will reconvene the following week. PCG will distribute meeting notes and presentation materials, provide additional information in advance, and continue discussion of priority workflow, improvement, and training topics requiring further clarification or follow-up.