## MEETING INFORMATION

| Date | Advisory Group |
|---|---|
| *10/02/2026* | *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:
    - Corrie Wilder (WSIPC), Dana Anderson (WSIPC), Sue Ann Bube, Analisa Ficklin, Devin Gurley, Laura Staley, Margaret Harriss, Laura Petrie, Ronelle Poe, Tania May (OSPI), Teri Engelbrecht, Tracy Pitzer

## Meeting Topics

**Updates from Last Week**

- PCG presented the content on slide 4.
- Advisory member requested timelines on expected solutions presented as in process. PCG clarified that the change in the middle will be first to deploy next week. The other two need an additional week.
- Advisory member requested the location of recording and transcripts from these meetings. Another advisory noted that we aren't posting transcripts, but shared that information is posted at https://www.wsipc.org/iep-online. If other details are requested, we can work to provide that where needed.
- Another advisory member stated a concern with the non-PCG attendance at these advisory meetings and for those who attend who may be doing this work in the field amid the increased workload due to the problems the group is aiming to address. PCG is open to recommendations for alternative engagement solutions to be responsive. WSIPC reinforced this message.
- Advisory member stated that we have issues with information being added to the PDF when the information is not on the document. PCG affirmed we have deployed the enhancement on this and it is currently in UAT testing today. Assuming it passes UAT testing it will go live this weekend.
- PCG presented the content on slide 5. PCG needs to confirm the spec for character size and limits based on advisory question. Advisory asked for clarification about why this transfer process does not include the change for non-transfer IEP services description. It's an open question that will need to be revisited by PCG. Advisory raised that This is necessary for Safety Net submissions. Without it, we are left with workload issues of amending or rewriting IEPs.

Contact Log – Discussion (slide 6)

- PCG presented option and asked for affirmations from the advisory. No downsides presented by advisory, but question raised about why the system is using calendar year and not school year, recognizing we work in the latter. PCG is open to determine whether it is available to configure using the school year and in which case, they will report back on this configuration. PCG recognizes that the solutions are both short-term and long-term priorities and in this case, this request has been noted several times and is a quick efficiency to gain.

Referral to Evaluation Changes – Discussion (slide 7)

- PCG presented option. Advisory asked whether this was already an option in version 2.0 and PCG clarified that it's not exactly the same where the evaluation originated in the same point and this is slightly different. Multiple advisory members disagreed with this proposed workflow change. For districts that do not use the 504 module, the language is needed to signal that the referral will be in another system. Advisory noted this suggested change would be redundant based on the language of "referring" as a term that precedes an evaluation rather than suggesting the referral suggests the start of the process. Advisory noted that many districts are not actively using IEP online 3.0 in real-time in the workflow for School Improvement Teams (SITs) which means the system is engaged after a referral, not before. Advisory member suggested if this is a text box that generates the statement of the decision for the purpose of documentation, then I think having the options with the correct language is important. Advisory suggested it be revised to "Proceed to Special Education Evaluation", "Refer for 504", or "No Further Action" and remove the reference to "SIT".
- Advisory raised the concern that PCG has removed the option for local control with 3.0 and requires the advisory to support decisions that use language differently across districts that are locally, legally compliant.

IEP Modification Change – Discussion

- PCG presented the content on slide 8.

- Advisory asked whether “Customer Modification” was an option in 2.0. PCG clarified this was an option, but is still in the development phase. Advisory members supported this change but also recognized this has not been an issue raised by some districts at this time nor is it considered to be a high priority among more pressing concerns in the larger workflow. Advisory also asked that PCG make sure that this doesn't add to the problem of information not coming through cleanly in IDTs and resulting in a code rather than the language from the IDT.

Transitions – Discussion (no slide content)

- PCG wanted additional information on secondary transitions and shared the page for review and discussion.
- Advisory raised workflow concerns with:
    - postsecondary goals – when preparing to finalize, users enter the goals, followed by a Zendesk ticket with the student ID number for a patch to be applied, then followed by going back to the system to reconcile. This has to be applied for every student with 3-5 iterations to get this done. Cannot finalize any of the transition IEPs. Advisory also noted that the creation of summary performance for an exiting student is also difficult. Advisory asked for a timeline and PCG committed to follow up for clarification after another review of the HelpDesk tickets. Advisory said this workflow is holding up the 442 compliance, trainings and corrective action with the state delaying reporting to OSPI.
    - spell check not working in 3.0 worse than the issues in 2.0 but being told by HelpDesk that it’s resolved but isn‘t in Chrome or Edge browsers across districts
    - testing accommodations – PCG recognizes this is a topic to bring forward to this group as we know it’s a problem.
    - Service matrices are not moving over accurately and the advice being given is to reenter the service matrix in every document. PCG acknowledges this topic needs further discussion and inquiry.

Next Steps and Closing

-

## SYNTHESIZED MEETING TOPICS

**Updates from Last Week**

The team reported progress on several workflow improvements. Specifications have been completed to change how consent is obtained and recorded for reevaluations and assessment revisions, and development has begun on separate tracking of IEP meeting dates and implementation dates. A type-in search is also being added to key service lists to reduce scrolling. Participants requested realistic implementation timelines and accessible follow-up information; consolidated updates and decisions will continue through weekly communications. Concerns about limited advisory-group representation and the burden on individual representatives to distribute information will inform a reassessment of outreach and engagement.

**IEP Services Description**

The IEP Services Description field has been added and is active for all sites, although individual sites may request deactivation through a support ticket. Participants requested confirmation of the character limit and clarification about how the field functions for transfer and non-transfer IEPs. The team will revisit whether the field fully supports Safety Net submissions without requiring districts to amend or rewrite IEPs.

**Contact Log Filter**

The proposed Contact Log enhancement would default to the current calendar year, allow selection of one or multiple years, and retain sorting by contact date. Participants supported easier navigation but questioned why the filter would use calendar year rather than school year. The team will determine whether a school-year configuration is feasible and report back.

**Referral to Evaluation Changes**

The proposed change would simplify referral recommendations to an evaluation option and a no-further-action option. Participants did not support the proposal as presented because district practices vary, particularly when Section 504 or student intervention work occurs in another system or before staff enter IEP Online. Suggested revisions included “Proceed to Special Education Evaluation,” “Refer for 504,” and “No Further Action,” while removing the student intervention team reference and preserving appropriate local flexibility.

**IEP Modifications Change**

The proposed change would retain a drop-down for common modifications while adding a free-text option for district- or student-specific entries. Participants generally supported restoring this flexibility but did not identify it as a higher priority than broader workflow concerns. They emphasized that custom language must transfer cleanly into IEP documents rather than appearing as codes and that reporting implications should be considered before implementation.

**Transitions**

Participants described significant secondary-transition workflow barriers, including repeated support-ticket interventions to finalize postsecondary goals, difficulty producing summaries of performance, and delays affecting compliance reporting, training,

and corrective-action work. They also reported unresolved spell-check problems, testing-accommodation concerns, and service matrices that do not transfer accurately. The team committed to review the related support tickets, clarify the resolution timeline, and bring these issues forward for further investigation and discussion.