## MEETING INFORMATION

| Date | Advisory Group | Facilitator(s) | Notes By |
|---|---|---|---|
| *9/23/2026* | *Reporting and Compliance* | *Jennifer, Heather, Mike, Steve, Dennis, Kris* | *Steve* |

**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.

(Highlighted names were in attendance)

| Name | District | Name | District |
|---|---|---|---|
| Andrea Staton | ESD 101/Mead | Betty Lopez | Selah School District |
| Dana Floyd | ESD 105 | Chris Bettineski | ESD 112, Kalama, Wahkiakum |
| Connor McCroskey | ESD 112/Battle Ground | Dawn Kellogg | Olympia School District |
| Margaret Harriss | ESD 112/ESA | Hannah Bolivar | Mercer Island |
| Katie Howell | ESD 113/Chehalis | Jeanne Foster | Castle Rock School District |
| Michaela Clancy | ESD 114/Port Angeles | Joy Rawls | Bellingham |
| Michelle Lanwehr | ESD 121/Bellevue | Juan Gandara | Franklin Pierce SD |
| Jameson Moore | ESD 121/Tahoma | Laura Staley | Rochester School District |
| Janna Rush | ESD 121/Peninsula | Nicole Lowe | Castle Rock School District |
| Sunshine Pray | ESD 171/Quincy | Steven Dahl | Mt Baker School District |
| Becca Anderson | Mukilteo | Analisa Ficklin | Bellingham Public Schools |

## Meeting Notes

- **List updates and current status.** PCG confirmed that requests received by September 18 were added and that submissions received during the week of September 21 were being reviewed for completion on September 23. No existing options are being removed because each originated from a district request. Requests already represented by an equivalent option were confirmed rather than duplicated. Members asked PCG to provide an updated change list after the newest additions are available.
- **Naming conventions and system constraints.** The system does not permit the same service name to appear across SDI, Related Services, and Supplementary Aids and Services. Qualifiers may therefore be needed, such as “Occupational Therapy (Related).” Members raised concerns about how this constraint affects local practice and asked whether the advisory group could propose and vote on a consistent naming solution. PCG confirmed that member recommendations are welcome, although the underlying no-duplication rule is part of the core system.
- **Medicaid and provider visibility.** Medicaid-related service requests remain under review with Washington Medicaid specialists. Discussion clarified that a student appears in the Logging Wizard only when the relevant related service is included in the student’s IEP Process workspace and the provider has “can provide” enabled for that service in their User Information page. The workspace is not the student's historical IEP but represents information available for the next IEP process and can be updated without creating or finalizing an amendment. PCG will add shareable screenshots and instructions to the notes. For transfer students, services should carry forward from the prior district; when they do not, staff may need to add the service and align the naming convention. Two members volunteered to support the specialized Medicaid workgroup.

- **Evaluation and IEP services linkages.** Exact naming currently controls whether evaluation areas connect to IEP service selections. Members described workflow and compliance concerns, including the inability to link a draft IEP to a locked or current evaluation as they could in IEP Online 2.0, the need for staff to verify that information carried over accurately, and the risk of incomplete or inaccurate records. PCG presented a district-level option to temporarily disconnect the linkages during the first implementation year and asked for feedback on implications, communications, and supporting materials. Members agreed to leave this as a district-by-district choice. Members will send specific examples, and PCG will continue exploring short- and long-term options. The group also discussed a potential longer-term mapping approach that could connect evaluation terms with acceptable IEP service options without requiring exact character-for-character naming matches.
- **Near-term improvements.** PCG reported that list updates will occur approximately twice each week moving forward and that a type-in search field is in development to make growing service lists easier to navigate. Separate tracking for the Next IEP Meeting Date and Next IEP Date is also planned. PCG reiterated that IEP Online 2.0 data will not be reimported, so districts will still need to complete transition clean-up while preserving records entered since launch.
- **Delivery Method field.** PCG sought clarification about whether 3.0 should distinguish direct and indirect services and how that distinction should affect service-minute calculations. Members noted that SDI is direct while related services may be direct or indirect, but several warned that adding the field could create additional confusion. The discussion reflected clear concern, and members did not recommend moving forward.
- **Permissions, resources, and future direction.** PCG noted that Office Hours recordings and FAQs will be shared through forthcoming communications. A question about printing an accurate IEP-at-a-Glance document after the meeting but before the future implementation date was referred to Advisory Workgroup 1, and an additional member asked to join that group. Longer-term work will focus on greater consistency in list naming, options for managing list length, and completion of the Medicaid review.
- **Key takeaways and next steps.** Districts and ESD representatives should continue submitting mission-critical list requests and practical examples of linkage impacts. PCG will send out updated list changes and share Logging Wizard guidance, continue the Medicaid review, and bring additional options forward for consideration. The next meeting is scheduled for September 30, 2026, from 1-2 PST and will address accommodations lists, state testing lists, evaluation and IEP linkages, and data and reporting.