Workgroup #3: User Permissions and Roles Advisory Group

IEP Online 3.0

September 2026

PUBLIC CONSULTING GROUP™

Solutions that Matter

Agenda

Opening and Listening | 10 min

Overview of User Permissions | 5 minutes

Problem Solving | 40 minutes

Questions and Next Steps | 5 min

Workgroup Participants

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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

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Message on the 2.0 to 3.0 Transition

Excerpt from District Leaders Memo: 9/17/26

We understand that the transition to 3.0 has created challenges for districts, staff, and service providers. It is important that we explain the realities of why returning to IEP Online 2.0 is not a feasible or viable option:

- Since IEP Online 2.0 launched over 15 years ago, federal requirements, security and accessibility standards, technology, and the needs of Washington's approximately 113,000 students receiving special education services have evolved. The **technology supporting 2.0 can no longer be reliably supported or updated to meet current requirements**.

- We initiated the shift to 3.0 in 2023 to enable your districts to meet **federal requirements, current industry standards, and future needs, with modern technology and an accessible, secure, compliant** – and in the long term, streamlined – user experience. To deliver this to you, our path forward is to continue to stabilize, support, and improve 3.0.

We know this has been a difficult stretch at an incredibly busy time for you, and we don't take that lightly. Complex technological transitions are never easy, and virtually impossible to implement without the need for adjustments along the way. Our intent and effort to communicate transparently and distinguish needed adjustments from intentional changes to the system has been genuine. We understand from you that it has not been as clear as we intended.

Message on the 2.0 to 3.0 Transition

We are working with our partners at WSIPC and others across the state to clarify our work to improve the system in ways that translate to your experiences and challenges. We also are working to more thoughtfully communicate intentional system changes that are critical to delivering the ultimate IEP management experience you need.

We appreciate your continued honesty and critical input; it is shaping our priorities. Our attention is squarely focused on improving the 3.0 experience for you, so you are able to re-center on what is most important: special education teachers and staff, and the students they serve.

Thank you for your continued honesty and critical input. We are striving every day to be better partners.

Hearing Your Concerns

We want to better understand your perspective on the impact of this transition. Please consider responding to **one** of the following prompts in the chat or aloud as you share your experience:

- What task or responsibility has become more difficult, delayed, or impossible to complete?
- Which staff roles are most affected, and how has their work changed?
- What is the impact on students, compliance, reporting, privacy, or district operations?
- What change, clarification, or support would have the greatest positive impact for your district right now?

User Permission Groups Overview

Group	Recommended For	Student Record Access
1/1A	SpEd Directors, District Admin, Medicaid Coordinator	**Any student regardless of association** (all schools, all grades, active/inactive students)
2	Department/ESA Leads or School Psychologists **who need access to all students at their assigned school(s).**	**All students at assigned schools** (all grades). Can serve as Case Manager or Team Member and assign caseloads.
3	Case Managers who will need **access to all students at their assigned school(s).**	**All students at assigned schools** (all grades). Can serve as Case Manager or Team Member and assign their own caseload.
3A	Case Managers who **access their caseload only**.	**Students on their caseload only**. Can serve as Case Manager or Team Member, but students must be assigned to their caseload.
3B	Case Managers who need school-wide access but **should not finalize/lock records.**	**All students at assigned schools** (all grades). Can serve as Case Manager or Team Member and assign their own caseload.
4/4A*	Service Providers, Related Service Providers, Therapists, and Therapy Assistants.(*4: EasyTrac Districts; 4A: Non-EasyTrac)	**All students at assigned schools** (all grades). Can be Case Manager or Team Members and maintain service-related records.
5	Users needing **read-only access** to student records at their schools.	**All students at assigned schools** (all grades), but **read-only access.** Can be a Team Member.
5A	Staff who need to **view only** the students for which they are responsible.	**Students on their caseload only,** with **read-only access**. Can be a Team Member.
6	Individuals who need **access to reports but not student record editing.**	**Reports only** for students at assigned schools (all grades). No active student record access.

How User Permissions Work in 3.0

Role-based access: consistent, secure, and standardized

- **Permissions are assigned by role, not user-by-user** — every user is assigned a User Type that carries a defined set of permissions
- **A standard set of User Types** covers the vast majority of district staff roles and responsibilities
- **70+ permission controls** shape each role at the system, page, document, and report level
- **Caseload and school assignment further tailor access** — the same role behaves appropriately for different users
- **Additional User Types are considered when a group of staff performs a distinct job function that no existing role supports** — not when an existing role differs by a single permission.
- **New staff inherit the correct access automatically** when assigned to a User Type

The Value of a Shared Role Structure

- **Proven, tested configurations** — roles are validated before rollout, so districts start from a known-good setup rather than building from scratch
- **Rapid support resolution** — shared roles let us reproduce what your staff sees and resolve issues quickly
- **Continuity through staff turnover** — new administrators inherit a documented, supported structure they can step into confidently
- **Faster access to new features** — a common foundation means upgrades reach all districts sooner and with greater confidence since every variant must be tested
- **Shared training, guides, and peer expertise** — materials apply everywhere, and districts can learn from one another
- **Verifiable student data protection** — consistent safeguards across all districts, demonstrable at any time
- **Your input improves the system statewide** — when a district identifies a real gap, we strengthen the standard role for everyone

Items for Advisory Recommendations

How to Provide Advisory Input

For each of the next three decision points, enter <u>one</u> response in the meeting chat when prompted, using the following structure:

SUPPORT
Example: I support the proposed direction as presented.

SUPPORT WITH CONDITIONS
Example: I generally support the direction.
[*Please briefly name the concern, clarification, or condition to address.*]

DO NOT SUPPORT AT THIS TIME
Example: I cannot support the direction because...
[*Please briefly name the significant concern or unresolved issue preventing support.*]

Your responses will help us document the group's recommendation, identify conditions or concerns, and determine what requires additional review.

1) Inactive Student Access

Summary: Currently in 3.0, access to Inactive Student information is limited to permission groups 1, 1A, and 2.

Request: Districts have requested to open up access to Inactive Student information to case managers or related service providers that are in permission groups 3 and 4.

PCG Assessment: Access to Inactive Student information can be configured for additional permission groups; however, it is important to understand this access cannot be filtered to include students on the user's caseload. Instead, users who will access Inactive Student information will be able to search for any inactive student in the school. The reason access cannot be limited to caseload is tied to the fact that when a student is inactivated, their grade, school, and case manager assignments clear.

Advisory Recommendation Request: Do you support expanding inactive-student access to Permission Groups 3, 3B, 4/4A, 5, and 6, understanding that access would allow users to search for any inactive student in the district and cannot be limited to assigned caseloads?

- Permission Group 3
- Permission Group 3B
- Permission Group 4/4A
- Permission Group 5 (view only)
- Permission Group 6 (reports only)

2) Reports Access

Summary: Currently in 3.0, access to Reports is limited to permission groups 1 and 1A.

Request: Provide case managers, related service providers, and principals with access to reports. Districts want confirmation that users will only be able to access the reports they generate in the system to ensure appropriate security measures are in place.

PCG Assessment: PCG added the My Reports functionality in 3.0; designed to restrict access to any system generated reports and only list reports generated by the individual user in the report access page.

Advisory Recommendation Request: Do you support restoring report access for Permission Groups 2 through 6, provided that users can only access reports they personally generate through the My Reports functionality?

3) Student Transfers (IDTs)

Summary: Currently in 3.0, access to request and approve student transfers (IDTs) is enabled for permission groups 1, 1A, and 2.

Request: Create permission group 2A that has the same permissions as group 2, but excludes the ability to request and approve student transfers?

PCG Assessment: PCG can add permission group 2A, mirroring permission group 2 setup, excluding the request and approve student transfer access.

Advisory Recommendation Request: Do you support creating a new Permission Group 2A that mirrors Permission Group 2 but excludes the ability to request and approve student transfers (IDTs)?

Advisory Recommendations at a Glance

Response pattern, conditions, and implementation considerations

1

INACTIVE-STUDENT ACCESS

2 support; 8 support with conditions

- Broad support for read-only access for Groups 3 and 3B.
- Mixed views on extending access to Groups 4 and 4A.
- Broad agreement not to extend access to Groups 5 or 6.
- Clarify view, completion, reactivation, and exception rules.

2

REPORTS ACCESS

10 support

- Restore access for Groups 2 through 6 through My Reports.
- Users access only the reports they personally generate.
- Results remain limited by each user's existing permissions.
- Explain why the same report may yield different results by user.

3

PERMISSION GROUP 2A

7 support; 2 with conditions; 1 not at this time

- Make Group 2A an optional district choice.
- Define request and approval authority and trained-staff expectations.
- Address duplicate-record and transfer-error safeguards.
- Distinguish Groups 2, 2A, and 3 in rollout guidance.

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Solutions that Matter