Consolidated Advisory Group:
1. Workflow, Improvements & Training
2. Reporting and Compliance
3. User Permissions & Roles

IEP Online 3.0

October 30, 2026

PUBLIC CONSULTING GROUP™

Solutions that Matter

Agenda

- **Discussion Items**
  - Overview of Data & Reporting System
    - Writeback
    - November 1 Child Count
    - Safety Net
- **Follow Up on Previous Workgroup Items**
- **Next Steps**

Previous Workgroup Scope and Connections

Group 1

Workflow, Improvements, and Training

FOCUS

Daily district workflows, usability, guidance, and training

Recap

- Based on guidance received, development priorities are focused on: IEP Meeting Date Timeline, Consent, Skeletal Records, Accommodations, Testing and List Item Stabilization.

Group 2

Reporting, Lists, and Compliance

FOCUS

Reporting accuracy, compliance data, and system lists

Recap

- Based on guidance received, reporting priorities are focused on: Writeback, Safety Net, Testing Accommodations, Referral and Initial Timeline, and Transfers Reports

Group 3

User Permissions and Roles

FOCUS

Access, configuration, and administrative control

Recap

- Based on guidance received, PCG actioned changes and updates to permission levels; updating user guides to support district roles and access.

Context Building | **Building on Previous Work for the New Consolidated Group**

IEP Online 3.0: Migration, Data & Reporting

Workspace vs. Historical Data

How the 2.0 to 3.0 Migration Worked

Translating Data into Reporting

What is Workspace Data?

Editable area for drafting and managing in-progress work such as referrals, evaluations, IEPs, and 504 plans.

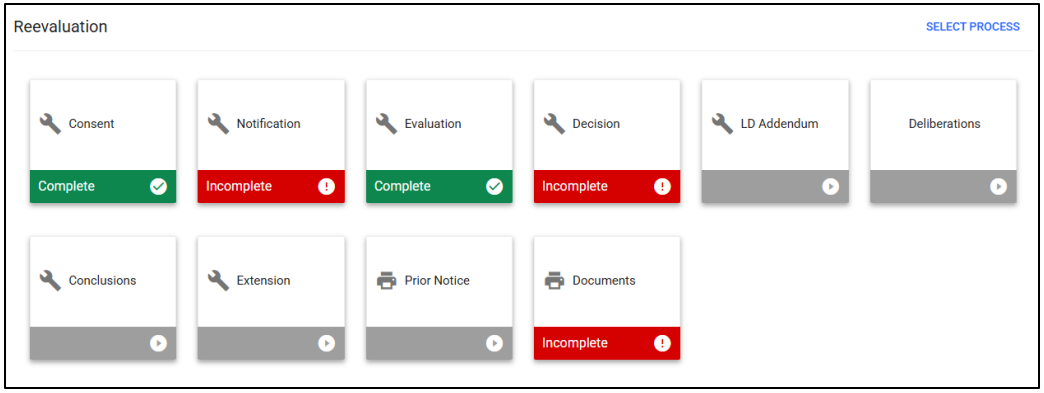
Reflects the most current data as of today.

Visible only to assigned users.

Not yet finalized: values can change until the record is locked.



Example:
Student has a referral with an evaluation that is in process, but eligibility has not been determined or finalized



What is Historical Data?

- A snapshot created when a record such as an IEP or 504 plan is locked (finalized).
- Read-only; the official record for audits, compliance, and advanced reporting.
- Preserves the student's profile at a point in time for longitudinal analysis.
- Listed chronologically on Student History, including events migrated from 2.0.



Active Inactive

Del		Event ID	Event Date	Event Type	Begin Date	End Date	User	Document	Date Created	Details
☐		483	07/02/2026	FBA Document	mm/dd/yyyy	mm/dd/yyyy	Emi Taylor	FBA Document (ID# 537) FBA Document (translated to CHINESE - SIMPLIFIED) (ID# 538)	07/02/2026 12:42 (117 days)	✎
☐		482	06/02/2026	Projected Eligibility Extension	06/02/2026	09/03/2029	Emi Training	Waiver Of Reevaluation (ID# 534)	06/27/2026 17:44 (122 days)	✎
☐	★	703	06/01/2026	IEP	06/01/2026	06/01/2027	Jessie Hinch		10/08/2026 09:17 (19 days)	✎
☐		480	06/01/2026	Projected Eligibility Extension	06/01/2026	09/01/2029	Emi Training	Extension of Initial Evaluation - Digital (ID# 528)	06/26/2026 17:53 (123 days)	✎
☐	☆	390	06/01/2026	IEP	06/01/2026	05/31/2027	Emi Training	IEP (ID# 327) IEP (translated to CHINESE - SIMPLIFIED) (ID# 328)	06/01/2026 15:20 (148 days)	✎
☐	★	389	06/01/2026	Medicaid Parental Consent (Overall)	06/01/2026	mm/dd/yyyy	Emi Training	Medicaid Consent - Digital (ID# 325) Medicaid Consent - Digital (translated to CHINESE - SIMPLIFIED) (ID# 326)	06/01/2026 15:18 (148 days)	✎
☐	★	626	05/22/2026	Eligibility Determination	05/22/2026	05/22/2029	Jessie Hinch		09/18/2026 12:34 (39 days)	✎
☐		386	05/20/2026	Parent Consent	mm/dd/yyyy	mm/dd/yyyy	Emi Taylor	Referral Document (ID# 314) Referral Document (translated to CHINESE - SIMPLIFIED) (ID# 315)	06/01/2026 07:58 (148 days)	✎
☐		387	05/19/2026	Referral	mm/dd/yyyy	mm/dd/yyyy	Emi Taylor	Referral Document (ID# 314) Referral Document (translated to CHINESE - SIMPLIFIED) (ID# 315)	06/01/2026 07:58 (148 days)	✎
☐		381	05/11/2026	Grade Change (04)	05/11/2026	mm/dd/yyyy	Emi Taylor		05/28/2026 08:06 (152 days)	✎
☐		380	05/11/2026	Assigned School Change (Training School)	05/11/2026	mm/dd/yyyy	Emi Taylor		05/28/2026 08:06 (152 days)	✎
☐		379	05/11/2026	Student Enrollment	mm/dd/yyyy	mm/dd/yyyy	Emi Taylor		05/28/2026 08:06 (152 days)	✎

Workspace vs. Historical Data





Workspace	Historical
Editable	Read-only
Current, up-to-date data	Full timeline of student records
Reports data as of “today”	Reports data as of event creation

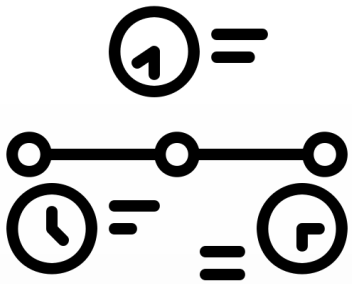
Key Takeaways

- Workspace is **where work happens**; Historical is the permanent record of what was finalized.
    - Workspace:
        - Changes as staff edit records and reflects the student **today**
        - Includes in-progress items not yet locked; values **can still change**
    - Historical:
        - A new event is added each time a record is **locked**
        - Read-only and preserved over time, showing **the full timeline**

How the 2.0 to 3.0 Migration Worked

Historical

- Events, dates, and PDFs from locked 2.0 records within the retention period (up to 22 years).
- Older and minor records arrived as dates and PDFs only (no field-level data).
- Lands on the Student History page as a chronological timeline.



Workspace

- Specific Field-level data from the “last locked” major record (Referral, Evaluation, Plan).
- “Last locked” = locked, with a meeting date in the current school year.
- Lands in the 3.0 Workspace; editable after migration.



Translating Data into Reporting





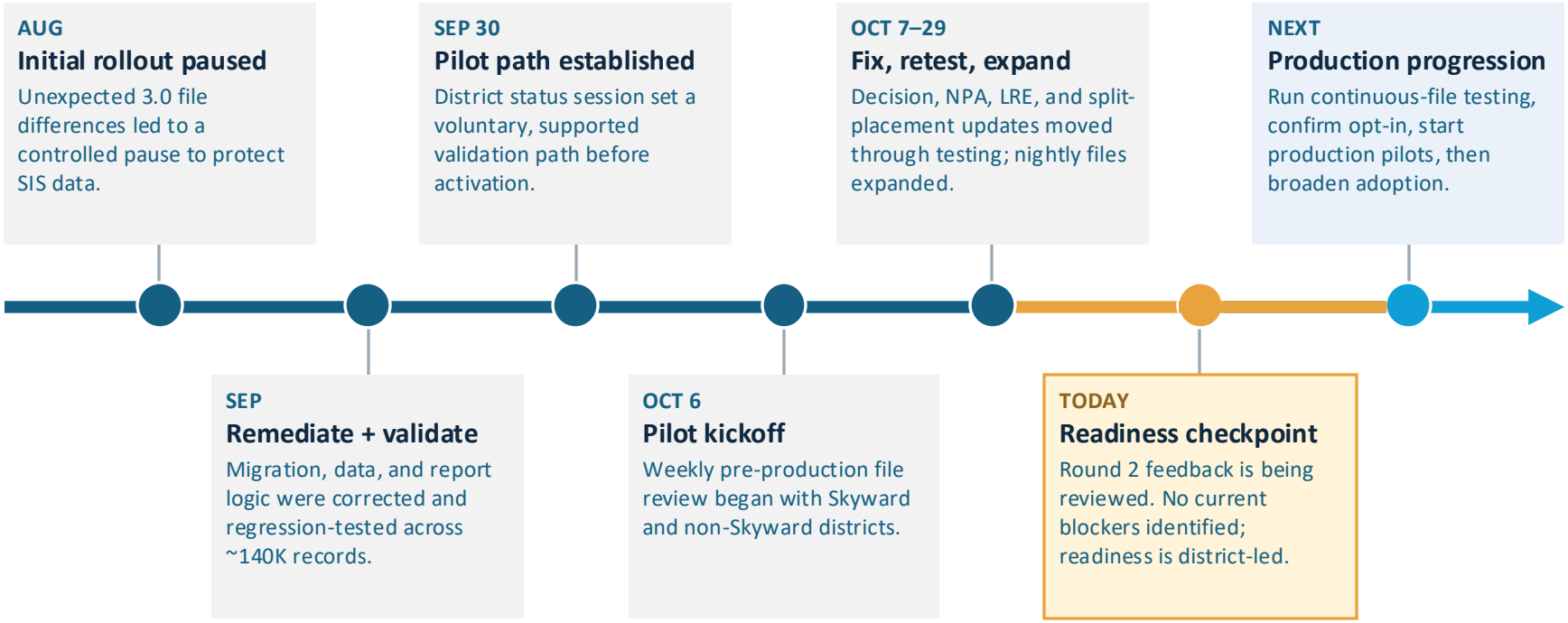
Workspace	Historical
Answers: “What is true today?”	Answers: “What was true when the record was locked?”
School: the student’s current school	School: the school at the time of the event
Services: in the student’s workspace today	Services: on the plan when it was locked

Before You Run a Report

- The **same question** can return different answers depending on the data source:
  - Define the question:
    - Do you need the student’s status **today?**
    - Or the status **at a specific point in time?**
  - Choose the source:
    - Workspace for **current caseloads and in-progress work**
    - Historical for **compliance, audits, and trends over time**

Writeback Status: where we are and what remains

From initial pause and remediation to district-led production readiness



COMPLETED • remediation, pilot setup, major fixes

TODAY • collect final Round 2 feedback and confirm readiness

REMAINING • validate daily flow, opt in, scale

November 1 Child Count



PCG is adding the Writeback report as a standard report for every district. Use it to review and verify child count data for the November 1 count. Users in Permission Group 1 can run it from IEP Online under Everyday Reports.



PCG will provide a Data Dictionary for the Writeback report. For each field, it lists where the data comes from and what it is used for.

Priority reports: current delivery status

All four reports are actively moving through definition, validation, or testing

DEFINE | SPECIFY | BUILD | UAT | RELEASE

Caseload / Safety Net

Provides student, service, and location information needed to review special education caseloads and support Washington Safety Net reporting.



Required Safety Net fields have been added, and the report is in UAT. Findings and questions are being documented in the development ticket.

Next: resolve UAT findings, regress, and release.

IN UAT

Testing Accommodations

Provides districts with student-level state and district testing accommodations by assessment to support testing preparation and administration.



Scope and output logic are defined. The specification is drafted and awaiting final sign-off before development handoff.

Next: finalize sign-off and move into build.

SPEC REVIEW

Referral + Initial Timeline

Tracks key referral, consent, evaluation, and eligibility dates to help districts monitor special education timeline compliance.



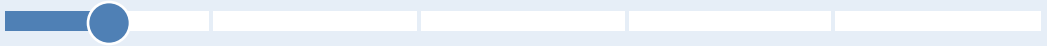
Initial specification is partially complete. Due-date calculations, finalization dates, and timeline logic are being refined and reviewed.

Next: complete logic review and approve specifications.

SPEC IN PROGRESS

Student Transfer

Identifies students whose IEPs were created through the Transfer Review Process



A basic report prototype has been created. It currently identifies transfers with a 3.0 IEP but still needs business input and refinement.

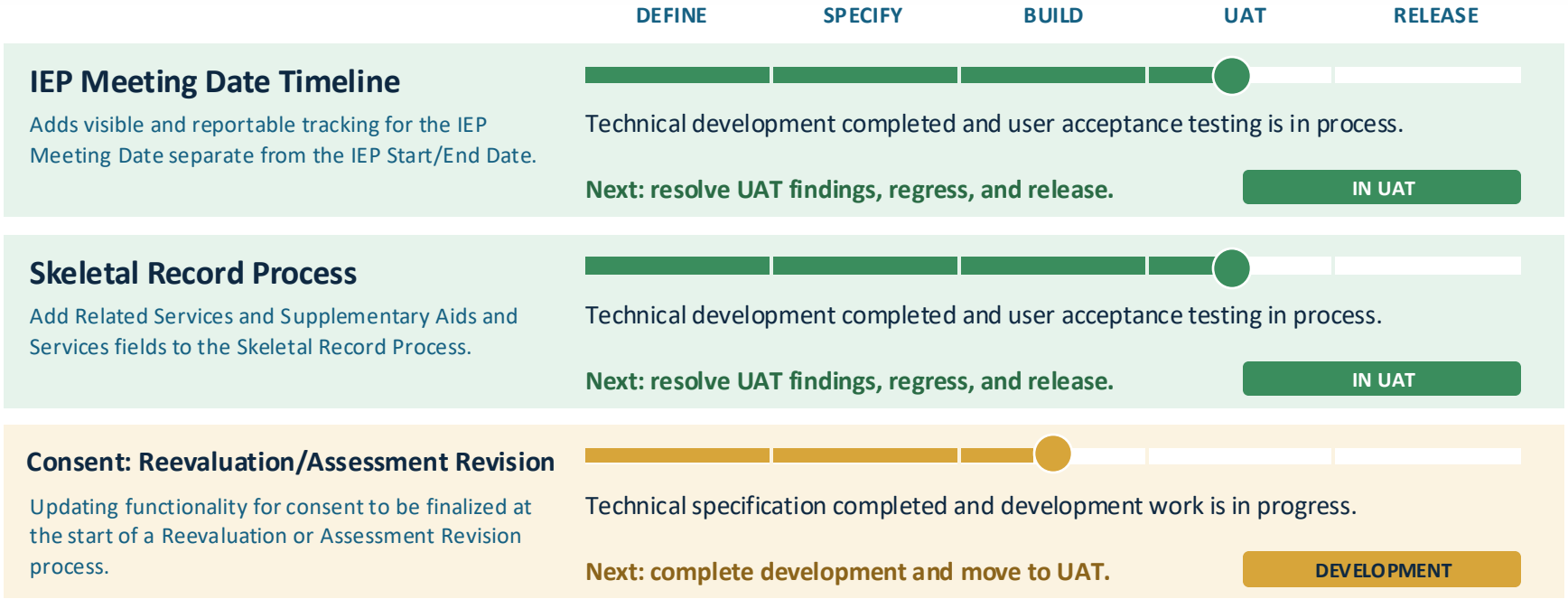
Next: confirm requirements and fine-tune report logic.

EARLY DESIGN

Overall: one report is in UAT, two are in specification review/refinement, and one is in early design.

System Stabilization: current priority and status

Top three priority items are actively moving through definition, validation, or testing



Overall: two changes are in UAT, and one is in development.

Next Meeting

- Friday, November, 6, 2026 from 10:00 – 11:00 PST



Solutions that Matter