SEAC Conformity Meeting

User Permissions, Roles and Lists: where we started, how we revised, where we are today

Looking ahead: the evidence SEAC needs to assess District Workflow

November 17, 2026 | Presented by PCG

PUBLIC CONSULTING GROUP

Solutions that Matter

A Sequenced Path to Conformity

November 17 begins the process; each area will be assessed in turn.

01

November 17, 2026: User Permissions, Roles and Lists

Present the conformity evidence and seek a formal vote on this area. Seek input from SEAC on evidence documentation needed for District Workflow assessment in December.

02

December 2026: District Workflow

Present the conformity evidence and seek a formal vote on this area. Seek input from SEAC on evidence documentation needed for Reporting and Compliance Data vote.

03

January 2027: Reporting and Compliance Data

Present the conformity evidence and seek a formal vote on this area.

A conformity determination does not end PCG's work.

How Conformity Will Be Assessed

The majority of SEAC voting members must vote yes to determine conformity for that area. For any no votes, technical evidence must be provided.

Yes Vote
Meets conformity

Required outcome **can be** accomplished with reasonable reliability. Process may differ from prior practice, with added steps, training or manageable workarounds.

No Vote
Does not meet conformity

Required outcome **cannot be** accomplished with reasonable reliability. Specific technical requirement and the evidence needed to reach conformity must be identified.

Conformity requires 6 of 9 ESD members to vote Yes.

Workstream 3

User Permissions, Roles and Lists

Where we started, the 3.0 launch, the revision process, and where we are today

Where We Started

Initial feedback from districts when 3.0 launched showed some misalignment between system settings and district practices.

User Permissions and Roles

Who can access what, and when

Existing permission groups did not fully reflect district responsibilities, workflow patterns, confidentiality needs or administrative scenarios.

Districts raised security, operational and role-impact concerns after go-live.

Services Lists

Service lists used across workflow, billing and reporting

3.0 moved districts to more consistent list items for special education services, related services, and supplementary aids and services, among other areas. Districts found the revised lists were not all-inclusive.

District list needs varied across workflows, billing, and reporting. The list-management model had to be reconciled with permission and reporting needs.

How We Revised: District Voice to Decisions

We created the User Permissions, Roles, and Lists Workgroup to gather district feedback and drive 3.0 improvements.



Purpose: Ensure user roles and permissions appropriately balance access, security, efficiency, and the practical responsibilities of district staff.



Focus: Examine how different users need to access, create, review, approve, and manage information within IEP Online. Identify permission barriers or gaps, recommend clearer role definitions and configurations, and help ensure access models reflect actual district responsibilities while protecting sensitive student information.



Participation: Group formed in early September, so district voice, shared understanding and priorities were consistent. 12 district participants.



Meeting cadence: Held dedicated sessions 9/18, 9/25, 10/2. Weekly meeting updates shared via minutes and power point decks.

District input informed PCG decisions and validation.

Initial User Permission and Role Guide

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.

User Permissions and Roles Decisions and Action

The workgroup reviewed several categories of user permissions and made recommendations for improvements, which PCG actioned.

Decisions Actioned

Permissions expanded across 7 areas: Inactive Students, IDTs, Compliance Notifications, Translation, Reports, Contact Log and Service pages. Concerns have stabilized significantly.

Status Today

System access aligns with the user's role.

Revised User Permission Guide

Services Lists Decisions and Action

Service and other lists are used across workflows, billing and reporting.

Decisions Actioned	Each ESD reviewed three lists, including **special education services**, **related services**, and **supplementary aids and services**, and requested 'critical' additions.
	All critical items received from district/ESD representatives were added on a rolling basis.
Status Today	PCG continues to monitor and respond to list refinement requests.
	Next: Keep standard selections and add custom entry for accommodations and modifications.

Expanded options support individualized student needs and align more directly with district practices.

Evidence: Services Lists

Workstream 1

Next: Demonstrating District Workflow Conformity

What SEAC would like to see from us before a determination

District Workflow: Scope and Status

Corrective-action items and evidence available today (October 7 review)

ID	Corrective commitment	Status
DW-00	Workflow and usability corrections	
DW-01	Evaluation data into a draft IEP	
DW-02	Consent finalization outside Eligibility	
DW-03	Distinct IEP Meeting Date event	

We will not claim closure until districts validate.

What Evidence Would SEAC Like to See?

Questions for SEAC so we can prepare the December workflow assessment

01

District Tasks

Which end-to-end workflows best show whether districts can complete required outcomes?

02

Evidence Type Needed

Live demonstration, test results, validation by district users, or ticket and advisory trends?

03

Blockers versus preferences

Defining technical blockers to conformity versus preferences or future enhancements.

04

Earning a conformity vote

What additional evidence would you need to see?

Your answers define what we bring to the December meeting.

Proposed Walk-Through and Next Steps

What we can show at the next conformity meeting

What we can walk through

- Structured workflow presentation: each corrective item, status and available evidence
- Side-by-side district walk-throughs, prioritized from support-ticket data
- Live demonstration of the corrected workflows in a test environment
- Facilitated breakout on technical blockers

Next steps

- SEAC confirms evidence requirements
- Early-December date set for the formal workflow assessment
- Reporting and compliance data follows in January
- Weekly district engagement and workgroups continue

We will drive this to conclusion and keep the consolidated workgroup going.



Solutions that Matter