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FY27 Continuous Improvement Plan

Status and Progress

A major goal in our Continuous Improvement Plan this year was to migrate ProgressBook user accounts to a modern Single Sign-On (SSO) framework with Multi-Factor Authentication (MFA) using our new identity management platform, miniOrange. This transition represents an important step toward enhanced security, more flexible access management, and a stronger foundation for future integration across all supported applications.

To support the migration, districts were given the flexibility to choose their preferred migration window, Identity Provider (IdP), and MFA methods based on their specific needs. Because this transition involved all WOCO staff and district users, it required extensive documentation, coordination, training, and ongoing support throughout the implementation process.

Our initial goal was to have all 34 districts fully migrated by December 31, 2025. While the initial deadline was not met due to software and development issues beyond our control, the project has since been successfully completed.

The implementation of the new Exago version for creating Analytic Hub reports and providing related training sessions was initially a goal for the 2025–2026 school year. However, this work has been extended into the 2026–2027 year due to issues identified with the new version.

To date, the new Exago version has been successfully installed for one district. This pilot implementation has provided an opportunity to evaluate changes, identify issues, and begin system testing in a live environment.

All remaining districts are expected to be converted to the new version by July 2026, provided that outstanding issues are resolved and the system is fully stabilized.

Support continued to be provided to users for reporting data related to the Summer EBT program. Again, this year a new Analytic Hub report was

developed in response to updated data requirements and made available to all districts.

With this updated report, districts are able to generate the required data files at any time, streamlining the submission process and helping ensure reporting deadlines are met efficiently. This ongoing enhancement continues to improve both the flexibility and accuracy of Summer EBT data reporting across districts.

Throughout the school year, we continued to offer both in-person and Zoom trainings at WOCO. All Zoom sessions were recorded and made available for convenient access and review. When it better served our users, support staff traveled directly to districts to conduct on-site trainings.

We also scheduled regular open lab sessions at WOCO, providing users the opportunity to work on their specific tasks with one-on-one assistance from support staff.

Comprehensive documentation and training sessions were provided for the beginning-of-year startup, with additional trainings offered throughout the year as needed. In addition, we hosted software release webinars to demonstrate new features and highlight resolved issues included in each release.

We continued to represent our districts by serving on multiple statewide committees, voicing their needs and concerns. Participation in these

committees allows us to stay informed about upcoming software enhancements that will benefit our users.

Support for participating districts in the Roster Verification (RV) process included importing of all necessary student data files to ensure the application was properly populated. Ongoing assistance was provided throughout each phase of the process, helping district staff navigate tasks, meet deadlines, and ensure data accuracy.

We continually evaluate third-party applications to identify tools and resources that improve functionality, boost efficiency, and meet the specific needs of our districts. When applicable, we invite vendors to host product demos for district users, giving everyone the opportunity to explore the options.

CIP Goals

To achieve our objectives and enhance our services, we have outlined the following key goals:

Maintain Comprehensive Training:

- Continue offering various trainings, including in-person sessions, webinars, open labs, and one-on-one district trainings designed to meet district user's needs.

ProgressBook SSO and MFA Implementation:

- Provide security training within our organization as well as with our districts
 - Identify security managers
 - Review the process for creating new accounts as well as adjusting account access
 - Review job functions

Enhance Analytic Hub Reporting and Training:

- Continue developing Analytic Hub reports to provide faster and more efficient access to clear reports and relevant data files.
- Following the implementation of the new Exago version, conduct training sessions on running Analytic Hub reports.
- Offer workshops for district users interested in creating custom reports using the Report Designer.

Support Staff Transition:

- As part of maintaining strong support for district users, the Student Services team will be going through a transition as the current support staff member for GradeBook and SameGoal moves into a new role within the Technology Department. With this change, a new team member has been hired to take over support for these systems.
- The new staff member will spend the summer training and working closely with the current staff member to ensure a smooth transition. This will include hands-on experience with day-to-day support, troubleshooting common issues, supporting reporting needs, and working with district users. Documentation will be made available to support the training process and provide a resource moving forward.
- The goal is to have the new staff member fully prepared to support GradeBook and SameGoal by the start of the new school year, ensuring continuity of service for districts.

Support District Transition to Updated Attendance Requirements:

- Assist districts in transitioning from HB410 attendance rules to HB96 chronic absenteeism requirements by providing guidance and training to support understanding and implementation of the updated requirements.

By achieving these goals, we aim to enhance data accessibility, strengthen security measures, and provide exceptional support to our district users, aligning with their expectations.

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EMIS CIP Information FY27

FY26 Review:

1. EMIS Alliance sessions continue to be held for districts. Topics ranged from troubleshooting student data to a better understanding of ODEW reports. Training expands districts' knowledge of Excel, while providing them with tools to review and troubleshoot data. These are small group sessions.
2. EMIS extended services continue with ten districts being served. WOCO staff continue to provide high level service to these districts, while working closely with district staff to ensure accurate data reporting.
3. EMIS staff started utilizing a shared Google drive (WOCO EMIS Resources) to be able to share helpful documentation to districts. The WOCO EMIS Resources shared drives houses quick guides and cheat sheets, detailed instructional documents, as well as a place to archive our training documentation from meetings and EMIS Alliances.
4. EMIS Task Calendar is a working document that gives EMIS Coordinators a checklist of monthly tasks to complete. This document works as a "reminder" of tasks that should be completed within the EMIS deadlines. A summarized version of all checklists in one document that is printable for districts to help stay on task with all EMIS related reporting.

FY27 CIP Goals:

1. Guidance to EMIS: Bridging the Gaps of EMIS Reporting

Goal: Providing cross training for EMIS Coordinators and Guidance Counselors to bridge gaps between information guidance tracks on students to ensure it is properly reported in EMIS.

How: Hands on sessions with districts

Measured: Evaluations, accuracy of EMIS data

2. Staff EMIS: Payroll to EMIS

Goal: Another cross training session to help EMIS Coordinators and fiscal staff understand the importance of Staff EMIS reporting and where the data crosses paths.

How: Hands on session with districts

Measured: Evaluation, accuracy of EMIS data, helpdesk tickets

3. Deep Dive Documentation: EMIS Elements

Goal: Detailed documentation for various cumbersome EMIS elements, such as the DN record. Detailed information regarding each element, the valid options and whether the data is required or optional for reporting purposes.

How: Provide documentation in EMIS Resources Drive

Measured: Helpdesk tickets, EMIS data accuracy

4. Helpful How To Videos: EMIS Helpful Tips and Tricks

Goal: Providing districts with video to follow along for tasks that may be cumbersome or items that only occur once a year. Examples would be subtotaling FTE reports, creating Ad-Hoc reports, etc.

How: Create videos and place them in the EMIS Resources Drive

Measured: Helpdesk tickets, quick survey at the end of each video

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Previous Goals

Fiscal Year 2026 was a busy and productive year for the tech department at WOCO. We completed our NIST 800-53 priority 3 assessment with very little negative findings.

We completed a refresh of our compute and storage infrastructure, satisfying needs for current and future growth for the next 6-7 years.

All districts have been onboarded to our MiniOrange IAM solution for access to the ProgressBook suite and State Software Redesign.

We have begun development and testing of our SD-WAN solution. This will allow for redundant connectivity for schools that wish to use it. Critical systems like VOIP, HVAC, Building Security, etc. all run on the network. Fiber outages are a threat to a safe and productive school day. Our Project SAFE Net solution looks to remedy that with SD-WAN appliances and Starlink connectivity.

E911 Implementation continues to be an ongoing process. We will keep working with districts and TEC to make sure all districts are fully E911 compliant.

New Goals

WOCO will continue to make NIST 800-53 compliance a primary goal. There are many areas of our Priority 3 assessment that need to be tightened up and remedied. The focus will also be on strengthening and re-assessing Priority 1 controls.

We have had another incredibly successful eRate season, winning many of the projects we bid on. We will continue to focus on providing solid, cost-effective network engineering and installation for our member districts.

We will begin deployment of our Project SAFE Net SD-WAN solution to those districts that wish to participate.

We are adding a IP address management solution to our MIBS service, so we can better track IP addresses on district networks that we manage.

We will continue to expand our use of the MiniOrange IAM into products like Helpdesk, LiquidFiles, and our VPN. This will allow for extra security, and a seamless authentication experience across all applications.

There will be some position changes at the beginning of the fiscal year. Jay Wentz will move into our Systems Manager position. This is a net increase on the staff side, as Mike Wagner will continue to assist from the Director role as time permits. The transition will take some time, but will be a benefit to our member districts.

Collaboration

WOCO prides ourselves in maintaining close contact with other ITCs around the state to share knowledge and ideas. This includes ventures such as the Security Working Group and the ITC Tech Conference in Columbus.

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FISCAL CIP – FY 2027

Fiscal Year 2026 Goals Review

- **Primary Focus: Software Support, Professional Development, and Training**

Our goal is to provide high quality training and professional development opportunities to our WOCO member districts and to the WOCO staff. We also work cooperatively with other ITCs and local/state organizations to provide additional training opportunities.

- Our primary focus is to monitor incoming Helpdesk Tickets (**Solar Winds**) and Emails (**Gmail**) for current software issues districts are experiencing. We work to resolve outstanding helpdesk tickets as a

team and each team member regularly reviews their own open tickets and with the team lead (Andrew).

- We started utilizing **Scribe** (AI Tool) in FY2026 to enhance how we create documentation to answer tickets.
- We started utilizing **ChatGPT** and **Gemini** in FY2026 to assist with researching district issues for tickets.
- We offer hybrid in person/online trainings to equip districts with the knowledge to process fiscal functions on their software package (EFP or Redesign).
 - We offered the following **trainings** to State Software and eFP (PS ERP) districts:
 - Annual Trainings:
 - Fall- EMIS Staff Initial L and Calendar Year End (with new OBBA Overtime processing Information).
 - For EFP we also provided CYE training for ACA Processing in EFP and ACA Hours Tracking in EFP.
 - Spring- Budgeting, EMIS Staff Final L, New Contracts, and Fiscal Year End (including Inventory training).
 - Throughout the Year: monthly office hours (1 hour on Zoom) for SS districts and for EFP districts.
 - New Regulations
 - We offered support/training on the new Budget and Three-Year Forecast specifications.
 - We offered support/training on new Qualified Overtime rules under the OBBBA.
 - We offered support/training on the new USAS Manual Changes.

- Additional Trainings for FY26:
 - For EFP we presented on Employee Timesheets and for SS we presented on Employee Self Service Timesheets so that districts could move timesheet processing to electronic systems.
- New Hire Trainings:
 - New Versailles Treasurer- Brad Luthman(Andrew)
 - Payroll Bootcamp SS (9/29)
 - Payroll Bootcamp EFP
 - New UVCC Payroll- Jennifer Shaffer (Nick)
 - USAS Manual Open Lab for new Treasurers (Feb 2026)
 - New Bethel Payroll- Krystalyn Goodson (Andrew)
 - **We will continue working on streamlining new hire onboarding/exiting staff process with videos/checklists**
- We continued to work on cross training staff within the Fiscal Department.
 - Both Nick and Jessica took on leading new trainings (EMIS Initial/Final trainings, CYE/FYE preclosing) this year.
- WOCO staff attends regular online meetings with other ITCs to learn about updates and possible training opportunities/needs for our member districts.
 - EFP- Weekly ITC roundtable calls, How-To-Article (HTA) Sub Committee meetings, Jessica joined the quarterly **EFAC**

committee (EFP), and Nick joined the monthly **Issues Working Group** committee (EFP).

- State Software-Weekly Friday's with Fiscal calls and Andrew finished out his terms on Prioritization Working Group (**PWG**) and State Software Steering Committee (**SSSC**).
 - Chelsea Baldwin (West Liberty Salem) was selected to take Andrew's place.
- WOCO staff presented at multiple statewide meetings for district/ITC professional development.
 - Andrew and Jessica attended the **SNUG 2025 Conference in St. Louis** to learn more about EFP and related PS products with other Ohio ITC members.
 - Nick attended the **OASBO SupportCon** Annual Conference with districts.
 - Andrew presented the Fiscal Roundtable at the **OECN Conference** in March.
 - Most WOCO EFP districts attended the **Statewide User Group for EFP** in March 2025 in Columbus (3 days). WOCO staff presented or co-presented in different 4 sessions (Future Payrates, Open Enrollment, EMIS Data Collector, and Salary Negotiations).
 - Jessica attended the **OASBO Annual** Conference with districts.
 - Andrew presented in May at **OASBO Payroll Beginners Training**.
- WOCO communicates these training opportunities in various ways.
 - WOCO's new event scheduling platform **Corsizio** allows us to schedule trainings in advance to have district staff sign up for.

Once district staff sign up they receive reminders, and once the event is completed they receive CEUs and the opportunity to provide feedback.

- We utilize **Google Groups** and **Google Drive** to send emails to group members with important updates, upcoming training opportunities, and provide documentation to districts.
- We send a quarterly newsletter using **Canva** with reminders about our upcoming fiscal trainings, important information, and links to documentation.

- **Secondary Focus: Software Changes**

We always strive to expand our knowledge of both eFP and Redesign to help our districts utilize their software packages more fully and efficiently. We also strive to be aware of any compatible 3rd party software options that may enhance the base financial software used by our districts.

- We continued to train eFP districts on how to expand the use of different modules in the software to meet their needs and integrate with 3rd party vendors.
 - In partnership with PowerSchools we launched a new WOCO consortium pricing model for PS Unified Talent Products (Applicant Tracking, Employee Records, SmartFindExpress, Professional Learning, Perform, etc) that integrate with EFP.
 - Nick and Jessica have provided implementation support to 5 districts (Anna, New Knoxville, Indian Lake, Madison Champaign, Riverside).
 - Additional Demos have been scheduled with other districts.

- We have begun the work to fold existing WOCO districts that are PS Unified Talent districts into the consortium pricing as well.
 - We also have begun offering more ticketing support when districts have SFE/Records integration questions.
- Jessica helped move all but 1 EFP district onto using SSO/MFA setup with EFP/EAC/ETS products through Google.
- Andrew helped USV, Bellefontaine and Anna do another year of Open Enrollment through the EAC and then helped West Clermont and Bellefontaine with ACA reporting through EFP(including fully reworking documentation for these processes).
- Andrew and Jessica helped Minster prepare for another year of using Equal Level/Euna Marketplace (vendor punchout).
- Andrew provided custom COGNOS report support:
 - Updates to APPRES, AMDCERT, and CERTBAL.
 - Updates to Bonefish Payment File and Bonefish Payroll File.
 - Creation of a GASB 101 report for the state.
 - Creation of Receipt Report by Period.
 - MOE IDEA report customization (and advanced search query) setup for all districts.
 - Additional updates to Custom Budget Reports and Custom ACA Reports.
 - Updates to TSA reports (Demographic and Per Pay)
- Andrew provided training on the Workers Compensation area of EFP to 3 districts.

- Andrew included the Budget Control and Period Allocation features in our Budget Prep Training for the first time (additional features).
- We helped several districts transition banks, update check printing formats (forms manager), and/or setup Positive Pay with their banks.
- We successfully moved all districts to eFPversion 25.7 and provided ongoing Issues Tracking and Training on new features (Position Control Changes, Employee Termination Changes, Precalc Report Changes).
- We worked with Southwest on exploring Powerschool's Student Activities Module.
- Nick and Andrew helped SWOCA/HCC districts with KY/IN tax setup and Child Support Setup.
- We continued to train State Software Redesign how to expand the use of different modules in the software to meet their needs and link with 3rd party vendors.
 - We helped multiple districts setup Positive Pay for their banks and helped 1 district (Russia) switch their bank setup completely.
 - We converted our first district (Bethel) to SSDT's new IPDP platform and trained their LPDC committee on it.
 - We began converting our districts to SSDT's new Document Storage Platform.
 - Mike and Jay moved our State Software instances from being self-hosted to cloud hosted with MCOECN.
 - Jay and Jessica moved all of our State Software districts off of using DUO Mobile for MFA to miniOrange.

- We integrated our first district (Hardin Northern) between SSDT's ESS and Frontline Absence Management.
- Nick Howell served on the SSDT SubHub Ohio Focus Group.
- We provided third party integration support for American Fidelity, Payschools Central, and SCView.

• **Other Goals**

- Cooperation with Other WOCO Departments
 - The Fiscal Department and EMIS Department collaborated on EMIS Ticket support throughout the year to help with L Collections.
 - Fiscal Department and Tech Department collaborated on MFA projects (SS and EFP), moving our SS hosting, and general troubleshooting.
- Cooperation with Other ITCs (see prior examples on statewide trainings/events).
 - EFP statewide COGNOS collaboration (see COGNOS support section).
 - HTA Articles-Andrew and Nick contributed multiple "How To Articles" to the statewide EFP wiki (such as Retirement Time, Future Payrates, Salary Negotiations, Indiana Taxes) and participated in monthly documentation review with other ITCs.

Fiscal Year 2027 Goals

- **High Quality Software Support, Professional Development and Training**

- We will continue to monitor helpdesk, email, and attend statewide meetings to anticipate possible future training needs for our members.
- We will continue to expand our usage of AI solutions to create documentation for districts.
- Continue to offer hybrid in person/online trainings.
- Offer high quality trainings for each software system to member districts (annual “cyclical” trainings, new regulatory support, and any additional trainings as needed).
- Presentations and input by the districts will be encouraged to help them learn from each other and expand the learning network.
- We will help organize and present at statewide meetings in person or online (EFP and SS)- weekly calls and conferences.
- We will provide support to our districts as they train new staff members (EFP and Redesign).
 - Jessica is now on the EFP user group sub committee for FY27.
- We are looking into better ways to share existing documentation with districts.

- **Upcoming Software Changes**

We want to continue to help expand our member district’s usage of their fiscal software systems and help integrate third party vendors into their software packages to help them achieve more efficient and effective day to day operations.

Future Opportunities to meet this goal include:

- We will continue working on consortium level pricing agreements for our districts (both new and existing **PS Unified Talent** customers) with Chad Sabo.
 - Additionally, we will work on providing support and user group collaboration opportunities for these districts.
- We will attend demos of any other third-party products with our districts as requested to provide integration support with their fiscal software packages.
- We will work on implementing the new **SSDT IPDP Platform** for State Software Districts and EFP that will replace our existing Legacy IPDP Platform.
- We will finish implementing the new **SSDT Document Store** for State Software Districts.
- We will work with Versailles Schools on Piloting **SSDT SubHub Ohio** platform.

• **Other Goals**

- Cooperation with other WOCO Departments:
 - Continue to work with Tech Department to finalizing implementing SSO/MFA for EFP and SS with a focus on making all applications fall under the miniOrange purview.
 - Continue to work with EMIS team:
 - 1-Ensure that our trainings do not overlap with each other so that district staff can attend all fiscal and EMIS trainings.

- 2-Have WOCO staff attend each other's trainings to see how we can further help our districts with EMIS related support and trainings.
- Cooperation with other ITCs: It is important to work with the fiscal staff at other ITCs to learn from them and allow them to learn from us. The districts in all ITCs will benefit from ITC cooperation.
 - Continue to attend OECN United Conference and EFP User Group.
 - Continue to attend Monday EFP calls, and Friday's with Fiscal for SSDT.
 - Continue to build relationships with other ITCs fiscal staff.
 - Continue to work with EFP supporting ITCS through COGNOS and HTA collaboration projects.