samegoal

Welcome Back to School

Welcome Back to School 25/26
August 15, 2025

Welcome back to school! We wanted to kick off the 25/26 school year by reminding you of our recent updates and highlighting a few back-to-school tips and reminders:

Recent Updates

- **Product Updates Webinar:** Registration is now open for our fall Product Updates webinar, which is being held on Friday, September 5th. Learn more.
- **Translation Notifications:** When a translator marks a form or document translation complete, a notification will be sent to whomever requested the translation. Learn more.
- **Translation Validations:** Document translations will run validation checks to ensure all fields have been translated before a translation can be marked complete. Learn more.
- **English Learner Instructional Accommodations Checklist:** This new form can help staff track instructional accommodations throughout the year. Learn more.
- **Manifestation Determination Review Report:** This new Special Education report provides a list of important dates related to a manifestation determination review. Learn more.
- **Caseload Management Policy:** SameGoal representatives no longer perform caseload management tasks (e.g. granting access to documents, transferring document ownership) on behalf of users. Learn more.
- **Data Loaders:** We have a new tool for bulk loading test scores and key program data. Learn more.
- **TestHound Report:** The TestHound report can now include district accommodation information. Learn more.

Tips and Reminders

All users:

- **Manage Your Caseload:**
    - On a document list page, switch the **Show: All** filter to **Show: Owner** in order to return a list of documents you own. Optionally, use other filters or copy and paste in a list of student IDs to refinethe search further. Bulk share documents as needed, including transferring document ownership to other users. You can now bulk share more than 50 documents at a time.
    - You can send document access request notifications to document owners. This allows you to request access to documents you currently have no permissions for, or you can request a higher level of access to documents you already have some permissions for.
    - If you receive a permission request, you can review it to approve or deny the request. Alternatively, you can choose to grant a different level of access than what was requested.
    - If you have lost access to documents you are listed as the owner of (e.g. if a student has moved to a building where you do not have permissions), even if you can no longer make changes to/view the documents, you will have retained document ownership. This means that you will still be able to share the documents in order to transfer ownership to the new Caseload manager.
- **Update Your Notification Preferences:** SameGoal has several different notification types. By default, you will be notified via your in-app bell, but you can configure your notification preferences and opt into receiving notifications via email or push notification.

Admin users:

- **Update Calendars:** Update the district and building calendars as necessary, including adding an additional school year.
- **Update District Banks:** Review existing district banks and update them as necessary.
    - Single-line default banks are now supported.
    - Consider utilizing bank templates.
- **Manage Users and Permissions:**
    - You can run the Systems Users report (**Reports** > **System** > **Users**) to get a list of all users in your system. Filtering and sorting this list can help you review

current user permissions and determine if any user accounts need to be updated.
    - If you would like to bulk update users, you can copy and paste in a list of user IDs on the **Users** page to search for many users at once. You can also filter users by role and update any users who no longer do the same job.
    - Review the existing user roles and determine if the current configurations make sense. If not, update the user roles accordingly.
    - Review SameGoal's blog page for newly added forms/reports. With the addition of new forms/reports, user roles will need to be updated in order for the forms/reports to be accessible to non-admin users. Add permissions for new forms/reports as needed.
    - When an existing user role is updated, any users who have that role applied will have their permissions updated automatically, without needing to reassign or change user roles.
- **Collapse Students:** Check if there are preschool or kindergarten students who were created manually who need to be collapsed into student records that have been automatically created via a nightly integration to your student information system.
    - You can run the System Students report (**Reports** > **System** > **Students**) to get a list of all students in your system. Filtering and sorting this list can help to find duplicate students.