

Caseload Management Policy

Caseload Management Policy Change
July 11, 2025

At SameGoal, we're always working to improve the user experience while maintaining the highest standards of security and efficiency. That's why we're announcing an important update to our caseload management policy.

Effective immediately, SameGoal representatives will no longer perform caseload management tasks on behalf of users. This includes granting access (or assigning a higher level of access) to documents, transferring document ownership, or making other caseload-related changes. Instead, caseload management will be handled solely by users or district admin.

This will help to ensure districts retain full control over who can access and manage documents within their district. Additionally, SameGoal now has several tools that can help users easily resolve access issues independently. These tools include:

- Document access requests: Users can send notifications to document owners requesting access (or a higher level of access) to documents.
- Retained document ownership: If a document owner loses access to one of their documents (e.g., when a student transfers to a different building where the user does not have access), they will still be able to update the collaborative team and transfer document ownership to the appropriate user.
- Bulk actions: Users can now share or transfer ownership for several documents at once.

Moving forward, if you need assistance with caseload management, you can:

- Reach out to a district admin user, who has full visibility and control over document access.
- Contact our Helpdesk and our support team can walk you through how to use caseload management tools.
- Utilize our 24/7 online support guides.

