

Copy to New Document

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January 25, 2021

Beginning 2/5/2021, SameGoal Plus Edition users will be able to copy a previously completed document to a new incomplete document. The new incomplete document will include most fields from the previous document, with the exception of dates, signatures and other select fields. There are two places within the application from which a new copy can be created:

- **Within a completed document** - Click the lock icon and select "Copy to new document". A new incomplete document will be created from the completed document.
- **From a student's "Documents" tab** - Check the completed document(s) you wish to copy. Click the "Actions" dropdown menu and select "Copy to new document".
 - Note: If the user selects more than one document of the same form type, and that form type only allows one incomplete document at a time (eg IEP), only the most recently completed document of that form type will be copied to a new incomplete document.

The version history of the new incomplete document will show an initial history entry that links to the source document.

Effective immediately, districts (admin users only) may change "Copy to new document" settings for any form by visiting Settings (left menu) > Form Settings > Form name. Options include "All users" (default), "Admin only", "No users" and "Disabled" ("Disabled" is set by system when no support for a given form is provided intentionally at a system level, eg for progress reports).