

End of Year Tips

Tips for the End of the Year
April 26, 2024

As we near the end of the 2023/2024 school year, here are some helpful tips and reminders on how to effectively wrap up your work in SameGoal before the end of the year.

All users

- On your **Caseload** tab, use the **Show: All Docs** dropdown and select **Show: Incomplete**. Review the list of incomplete documents to see if any of them should be completed.
- If you're on the Plus or Pro edition of SameGoal, check any upcoming deadlines on your **Deadlines Calendar** or review the students on your **My Students** list and check if any of them have upcoming due dates (indicated by red, orange, or yellow dots).
- On the **All** tab, use the **Show: All Docs** dropdown and select **Show: Owner**. Review the list of documents you own to see if you need to transfer ownership of any of them.
- Navigate to your **Caseload** tab and unstar documents you no longer want to have on your Caseload.

Administrative users

- On the **All** tab, use the **Show: All Docs** dropdown and select **Show: Incomplete**. Review incomplete documents districtwide. You may also use the **Building** filter to review incomplete documents by building.
- Run the **Deadlines** report and review any upcoming deadlines to determine if any of them need action before the end of the year.
- Run the state reporting reports and include **Invalid** records. Work to resolve any state reporting errors.
- Update existing user roles if there are known changes for the coming school year or summer session.
- Update user permissions by reassigning user roles and building permissions.
- Delete users who will no longer be accessing SameGoal.
- If users access documents primarily by having the documents shared with them (instead of automatic access through default permissions in user roles), bulk share documents with new owners for the summer session or upcoming school year.
- Merge/update buildings that are closing or being renamed.
- Check if there are preschool or kindergarten students who were created manually who need to be collapsed into student records that have been created via the nightly integration.
- Review existing district banks and update them as necessary.
- Review and update district settings and contact information by going to **Settings > District Information**.