samegoal

End of Year Tips

Tips for the End of the Year
May 2, 2025
Last Updated: May 23, 2025

As the 2024/2025 school year comes to a close, here are some useful tips and reminders to help you efficiently complete your work in SameGoal before the end of the year.

All Users

Review your incomplete documents to determine if any should be completed.

- Go to your **Dashboard** and click on **Past not marked complete**.
- On your **Caseload** tab, use the **Show: All Docs** dropdown and select **Show: Incomplete**.

Ensure you don't have any past due deadlines and review upcoming deadlines assigned to you.

- Go to your **Dashboard** and review the different options in the **Deadlines** pane.
- On your **Deadlines Calendar**, switch to **List** view to see any past due deadlines. Switch to **Month** view and use the arrows in the top left corner to see if there is anything due over the summer. Optionally, change the **Assigned to me** dropdown to **All** in order to see deadlines that are not assigned to you, but you may still be involved in.
- If you have access to run deadlines reports, navigate to **Reports** and select the program you'd like to review deadlines for. Run the Deadlines report. To see deadlines assigned to you, filter the Assigned column.
- Look at your **My Students** list to see if there are any students with deadline indicators on their badges.

Manage your documents as needed.

- Navigate to the **All** or **Caseload** tab and 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. While transferring ownership, if you change your permissions to **None**, the document(s) will be removed from your Caseload.
- While on your **Caseload** tab, bulk unstar any other documents you no longer want to have on your Caseload.

Administrative Users

Review all incomplete documents to determine if any should be completed.

- Go to the **Dashboard** page and click on **Past not marked complete**.
- 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.

Ensure there are no past due deadlines in the district and review upcoming deadlines.

- Go to your **Dashboard** and review the different options in the **Deadlines** pane.
- On the **Deadlines Calendar**, change the **Assigned to me** dropdown to **All** in order to see all deadlines across the district. Switch to **List** view to see any past due deadlines. Switch to **Month** view and use the arrows in the top left corner to see if there is anything due over the summer.
- Navigate to **Reports** and select the program you'd like to review deadlines for. Run the Deadlines report.

Work to resolve any state reporting errors.

- Go to **Reports** and run the state reporting reports. While on the settings configuration page, include **Invalid** records. Update invalid documents to resolve errors.

Update district settings.

- Review and update district settings and contact information by going to **Settings** > **District Information**.
- Review existing district banks and update them as necessary. This year, single-line default banks became available.
- Update the district and building calendars as necessary, including adding an additional school year.
- Merge/update buildings that are closing or being renamed.
- Merge/update grade levels that may be duplicates.

Manage users and permissions.

- Delete users who will no longer be accessing SameGoal.
- Update existing user roles as needed. Ensure user roles have been updated to account for all the new forms and reports that were created this year.

- Update user permissions by reassigning user roles and building permissions if there are any staffing changes.

Help users with Caseload management.

- Bulk share documents with new owners for the summer session or upcoming school year. To view documents a user owns, go to the **Users** page, search for the user, and click on their name. While on their **Documents** tab, change the **Show: All Docs** dropdown to **Show: Owner**. This will return a list of documents owned by the selected user. Transfer ownership of these documents as needed.
- Help to ensure users are aware of the new permission request functionality. When staff come back next school year (or over the summer), users will be able to request access to documents that haven't been shared with or transferred to them yet. Additionally, when a student moves to a new building, document owners will be able to transfer document ownership even if they don't have permissions for the new building.

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.

End of Year Admin Webinar

Additionally, we're very excited to invite administrative users* to our **End of Year Webinar**!

In this session, we'll review our end of year tips and tricks, and walk through key workflows to ensure a smooth transition into summer and prepare all users for the upcoming school year.

Date	Day	Time
05/16/2025	Friday	3:00PM - 3:30PM ET

* This session is only available to administrative users.

Webinar Recording