samegoal

End of Year Tips

Tips for the End of the Year
April 24, 2026
Last Updated: May 22, 2026

As the 2025/2026 school year wraps up, here are a few helpful tips and reminders to support you efficiently completing your work in SameGoal before the end of the year.

All Users

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

- On your **Caseload** tab, use the **Documents** filter to search for incomplete documents that you are the owner of. To do so, unselect **Complete** and **Not Owner**, then hit **OK**.

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

- If you have access to run deadlines reports, navigate to **Reports**, select the program you'd like to review deadlines for, and run the **Deadlines** report. To see deadlines assigned to you, filter the **Assigned** column.
- 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.
- Look at your **My Students** list to see if there are any students with deadline indicators on their badges. Additionally, hover over the badges to see a summary of upcoming deadlines for the student.
- Review the Workflow Highlight: Deadlines blog.

Manage your documents as needed.

- Navigate to the **All** or **Caseload** tab, use the **Documents** filter and search for documents you own by unselecting **Not Owner**. Review the list of documents 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.
- You can request document access for your incoming students (you may need to wait until students have had their buildings updated in the SIS). Navigate to the **Students / create new** page and search for your incoming students using the **Building/Grade** filters or by pasting in a list of student IDs. Select the students and click **Actions** > **Request Document Access**. Search for the forms you would like to have access to and select the desired permission level.

Administrative Users

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

- On the **All** tab, use the **Documents** filter and search for incomplete documents by unselecting **Complete**. 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.

- 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.
- While on the **Deadlines** calendar, you can also change the dropdown to show **Unassigned** deadlines. To reassign a deadline, locate the document that triggered the deadline and transfer document ownership.
- Navigate to **Reports** > **System** > **Deadlines** and run the cross-program **Deadlines** report. If you want to see deadlines for a specific program, you can filter the report by program.
- Review the Workflow Highlight: Deadlines blog.

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**. Require FIE Impact Statement and Exclude Next Year's STAAR were added as options under **Special Education Information** this year.
- Review existing district banks and update them as necessary. This year, district bank only fields became available. Additionally, you can now manage per-field copy from existing support from the **District Banks** page.
- Update the district and building calendars as necessary, including adding an additional school year. It's best practice to build out calendars at least three years into the future (with at least a start and end date) to account for triennial evaluation deadlines.

- 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.

Assist users with Caseload management.

- You can 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, use the **Documents** filter and unselect **Not Owner**. This will return a list of documents owned by the selected user. Transfer ownership of these documents as needed.

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 will be hosting an **End of Year Webinar** which will be available to administrative users!

In this session, we'll cover end-of-year tips and best practices, and walk through key workflows to help ensure a smooth transition into summer while preparing users for the upcoming school year.

Date	Day	Time
05/19/2026	Tuesday	3:00 CT - 3:45 CT

Webinar Recording