samegoal

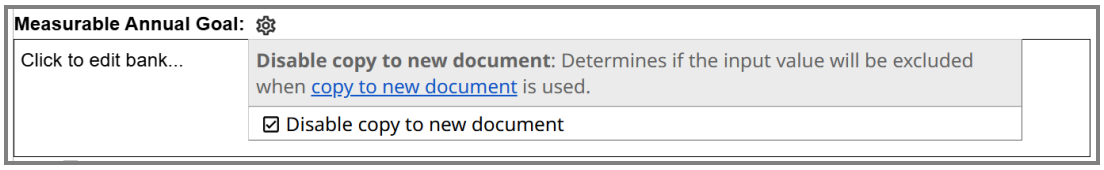
# Per-Field CFE

*Per-Field Copy From Existing Control*
*February 13, 2026*

Districts on the PLUS or PRO edition of SameGoal can create new documents by copying from an existing document, which can help save document authors a significant amount of time, especially when conducting annual plan reviews.

Many fields copy over, with the exception of most dates, signatures, meeting notes, and demographic information. However, districts often have different preferences about which specific information copies over–some districts want more information to copy over while other districts prefer less information to copy over.

In order to accommodate differing preferences and give districts more control over their workflows, we are rolling out a new feature that allows administrative users to disable copy from existing support on a per-field basis!




**Steps** *To disable copy from existing support for a given field:*

1. While logged in as an administrative user, navigate to **Settings** > **District Banks**.
2. Select the form you would like to update settings for. You may need to scroll or go to a different page.
3. Locate the field you would like to update.
4. Click on the gear icon [⚙] next to the field.
5. Select **Disable copy to new document**.
6. Changes will save automatically.

Tip Administrative users can still disable copy to new document support on a per-form basis, as well as limit copy to new document support to only administrative users.

Tip If a field never allows copy to new document support or copy to new document support is disabled at the form level, you will not be able to disable copy to new document support at the field level.

Tip The option to set fields as district banks only can now also be found by clicking on the gear icon next to a field.