samegoal

Deadlines

Workflow Highlight: Deadlines
April 17, 2026

As we enter the final stretch of the 2025–2026 school year, now is the perfect time to review your upcoming deadlines and make sure everything is on track.

Compliance is a top priority at SameGoal. That's why we offer a variety of tools and resources designed to help you stay organized, monitor key timelines, and confidently meet requirements.

Below are a few important deadline-related tools and resources that can help you stay on track and finish the year strong:

- Tracking Deadlines
- Creating Documents
- Support Pages
- Provisional Deadlines
- Administrative Tools

Tracking Deadlines

SameGoal provides several tools that make it easy to view and track deadlines across students, buildings, and programs.

Student Deadlines tab

Each student has a **Deadlines** tab that displays a table with all upcoming deadlines, past due deadlines, as well as any skipped documents or errors. The table includes the following columns:

- **Program:** The special program the deadline is related to.

- **Due:** The date the requirement needs to be completed by.
- **Deadline:** A short description of the deadline.
- **Required:** What specific form needs to be completed and the exact information that is required to satisfy the deadline.
- **Assigned:** The user who is set as the owner of the completed document that the deadline was determined from. The deadline is considered to be assigned to them.
- **Determined From:** The completed document and fields that triggered this deadline.

Reports

All programs with deadlines have an associated report that generates a list of all program deadlines and includes information about what the deadline is, when it's due, which student it's for, whom the deadline is assigned to, and more.

Steps *To run a Deadlines report:*

1. Navigate to **Reports**.
2. Select the program you want to view deadlines for.
3. Click on the **Deadlines** report.
4. Configure the report parameters as needed.
5. Click **Run Report**.

Users on the PLUS or PRO edition of SameGoal can utilize in-app report sorting and filtering. Otherwise, report results can be downloaded and imported into a spreadsheet in order to sort and filter the results.

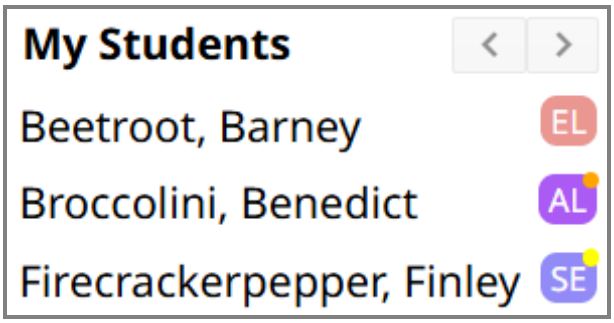
Tip Administrative users can make these reports accessible to non-admin users by updating their user role permissions.

Badge indicators

Throughout the system, you will be able to see program badges next to a student's name if they are currently participating in a special program and users on the PLUS or PRO edition of SameGoal will also see upcoming deadlines badge indicators.

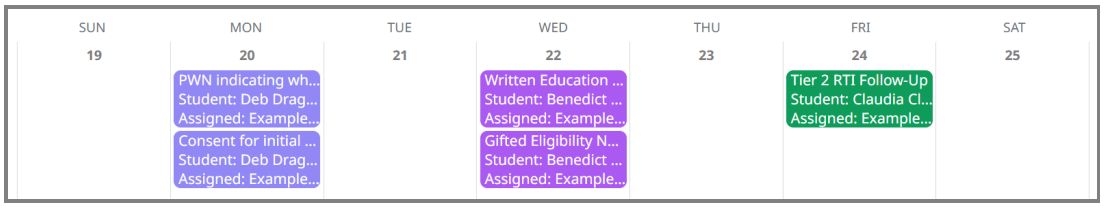
If there are upcoming or missed deadlines for a student, a deadline indicator will appear on the top right corner of the associated program participation badge. Red dots indicate missed deadlines, orange dots indicate a deadline due within the next 7 days, and yellow

dots indicate due dates within 30 days. Additionally, when you hover over the program participation icon, you will see a summary of deadlines for the program.



Deadlines calendar

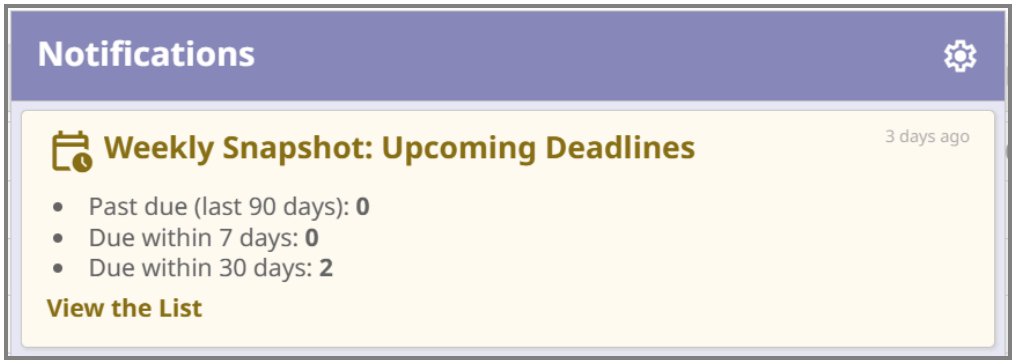
Users on the PLUS or PRO edition of SameGoal have access to the Deadlines calendar in the left menu. By default, this calendar displays all deadlines that are assigned to you. You may view deadlines by day, week, month, or in a chronological list format. You can also filter the deadlines by deadline, building, and grade. Clicking on a deadline in the calendar will display additional information including which student it's for, which document the deadline was determined from, and what is required to satisfy the deadline.



Notifications

Users on the PRO edition of SameGoal can choose to receive notifications for upcoming or past due deadlines. There are multiple types of deadline notifications:

- **Due Today:** You have one or more deadlines due today.
- **Overdue:** You have one or more past due deadlines (within the last 30 days).
- **Upcoming:** You have upcoming deadlines due within the next 30 days. This is sent as a weekly snapshot summary.
- **Unassigned:** There are upcoming or past due deadlines that have no assigned owner. This is sent as a weekly snapshot summary and is only available to administrative users.
    - Unassigned deadlines can be reassigned



Steps *To update your notification preferences:*

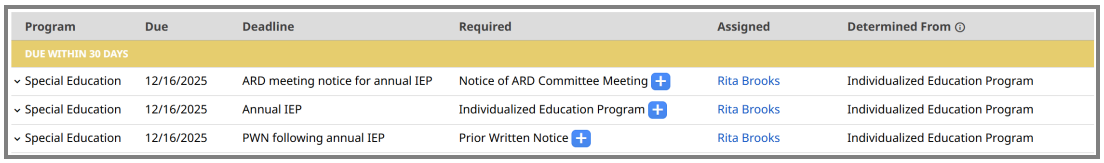
1. Open your notifications tray [🔔] in the top right of your screen.
2. Click on the settings icon [⚙].
3. While on the **Notification Settings** page, check or uncheck the notification checkboxes to configure how you will receive notifications for each notification type.
4. Your changes will save automatically.

Creating Documents

In SameGoal, there are several different ways to create documents, including ways to create new documents by utilizing deadlines.

Create from deadline

Whenever there is a deadline listed on a student's **Deadlines** tab, there will be a blue plus button [+] next to the form that needs to be created in order to satisfy the deadline. This feature can decrease the number of clicks that are needed to create new documents and can help limit confusion and make it easier to create the correct document, especially when multiple forms have similar names.



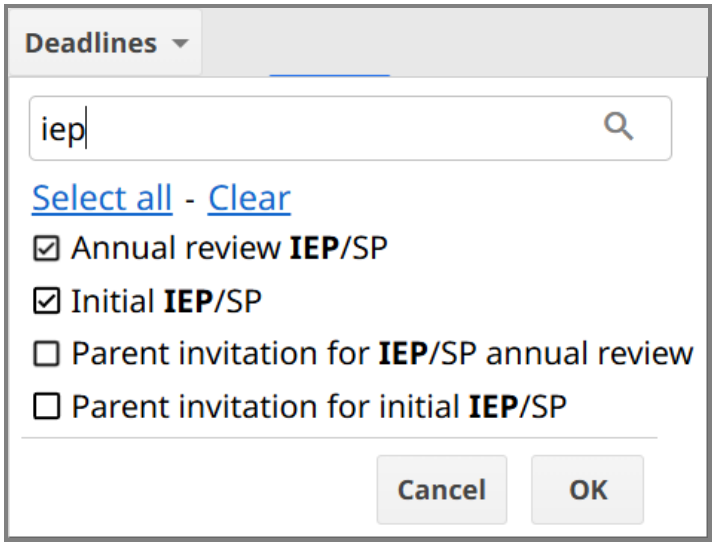
Program	Due	Deadline	Required	Assigned	Determined From
DUE WITHIN 30 DAYS					
Special Education	12/16/2025	ARD meeting notice for annual IEP	Notice of ARD Committee Meeting	Rita Brooks	Individualized Education Program
Special Education	12/16/2025	Annual IEP	Individualized Education Program	Rita Brooks	Individualized Education Program
Special Education	12/16/2025	PWN following annual IEP	Prior Written Notice	Rita Brooks	Individualized Education Program

Steps *To create a new document from a deadline:*

1. Navigate to a student's **Deadlines** tab.
2. Locate the deadline you would like to create a new document for.
3. Click on the blue plus button [+] in the **Required** column.
4. If you have permission to create the form type, a new document will be created for the student if they do not already have an in-progress document of the given form type.

Using the Deadlines filter

On the **Students / create new** page, there is a **Deadlines** filter that returns students based on their outstanding deadlines. This filter can be used in conjunction with the bulk create feature in order to create required documents for relevant students.



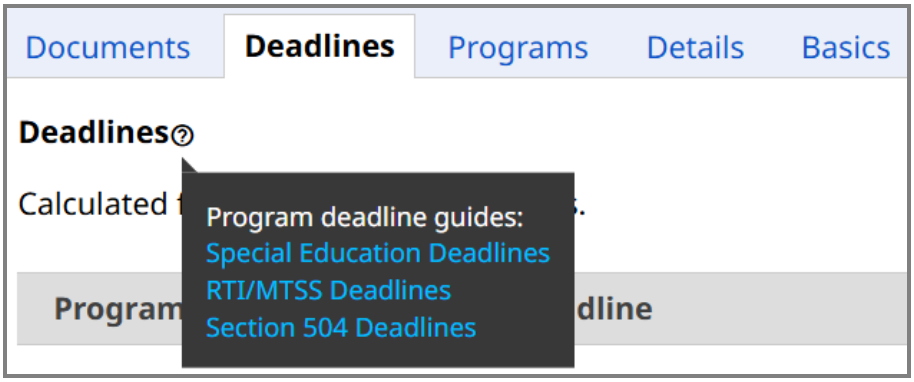
Steps *To create a document using the Deadlines filter:*

1. Navigate to the **Students / create new** page.
2. Use the **Deadlines** filter and select the deadline you want to create documents for.
3. Click **OK**.
4. Use other filters as needed and then select all students.
5. Go to **Actions** > **Create Document**.
6. Use the **Create** dropdown to search for the document you want to create.
7. Click **Create ## Documents**.
8. A new document will be created for each student if they do not already have an in-progress document of the given form type.

Tip Sometimes different deadlines are satisfied by the same document. For example, an initial IEP deadline and an annual IEP review deadline both require an IEP document. In these cases, you can search for multiple deadlines at once and bulk create the same document in order to satisfy both deadlines.

Support Pages

If you ever want to know more about how deadlines are calculated/satisfied, SameGoal maintains program-specific deadline support pages. These support pages list all potential deadlines for a given program and provide details about how the deadline is triggered, when it is due, and what is required.



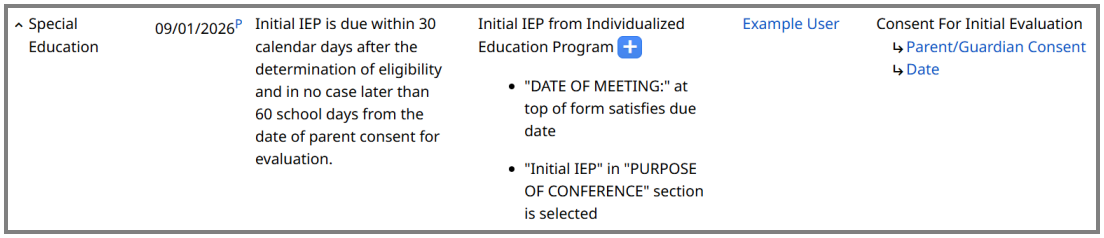
Steps *To access deadline guidance:*

1. Navigate to a student's **Deadlines** tab.
2. Hover over the help icon [?].
3. Click on the program you would like to see specific deadline guidance for.

Provisional Deadlines

Some deadlines are labeled as **Provisional** (denoted by a “P” next to the due date), meaning they are subject to change. This happens when a deadline is calculated based on all available data, but additional data may arise that affects how the deadline is calculated.

For example, if a plan document is due 60 days after consent or 30 days after an evaluation (whichever is sooner), we will calculate the deadline once consent is received. However, once the evaluation is completed, the deadline may need to be recalculated if 30 days after the evaluation date is sooner than 60 days after the consent date.



^ Special Education	09/01/2026P	Initial IEP is due within 30 calendar days after the determination of eligibility and in no case later than 60 school days from the date of parent consent for evaluation.	Initial IEP from Individualized Education Program • "DATE OF MEETING:" at top of form satisfies due date • "Initial IEP" in "PURPOSE OF CONFERENCE" section is selected	Example User	Consent For Initial Evaluation ↳ Parent/Guardian Consent ↳ Date

When additional documentation is completed, the due date for the provisional deadline may stay the same or it may be moved sooner, so it’s important to check upcoming deadlines for a student after completing documents in case anything has changed.

Administrative Tools

SameGoal provides many tools to help administrative users monitor and manage deadlines at the district.

Cross-program deadline reports

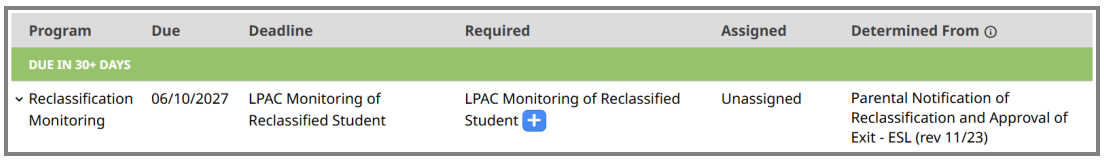
There is a system level report that administrative users can run that returns deadline information for all programs at once. This report returns the same information as the program-specific reports and it also indicates which program the deadline is related to. This report makes it easier for administrative users to monitor deadlines and compliance across the district.

Steps *To run the cross-program Deadlines report:*

1. Navigate to **Reports** > **System**.
2. Click on the **Deadlines** report.
3. Configure the report parameters as needed.
4. Click **Run Report**.

Unassigned deadlines

Deadlines can become unassigned if the user who was previously assigned the deadline leaves the district or loses document access. Administrative users can monitor unassigned deadlines using the Unassigned filter on the Deadlines calendar or with the Unassigned deadline notifications. These unassigned deadlines can be reassigned by transferring ownership of the document that triggered the deadline.



Program	Due	Deadline	Required	Assigned	Determined From
DUE IN 30+ DAYS					
Reclassification Monitoring	06/10/2027	LPAC Monitoring of Reclassified Student	LPAC Monitoring of Reclassified Student	Unassigned	Parental Notification of Reclassification and Approval of Exit - ESL (rev 11/23)

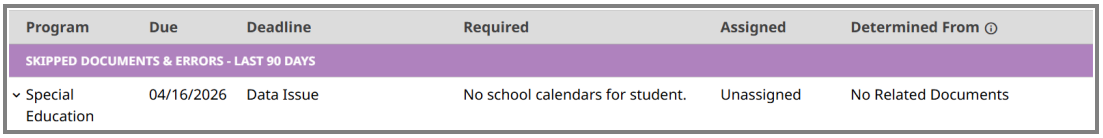
Steps *To reassign a deadline:*

1. Search for the student the deadline belongs to.

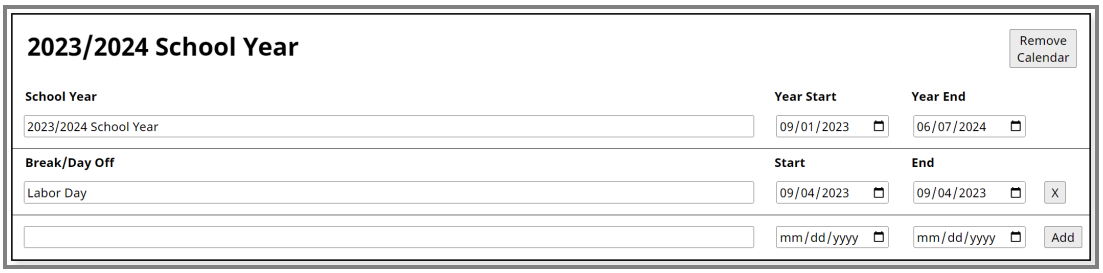
2. Navigate to their **Deadlines** tab.
3. Locate the deadline in question and navigate to the document listed in the **Determined From** column.
4. Share the document and transfer ownership to whomever the deadline should be assigned to.

Building calendars

Administrative users are able to create school calendars that can affect how deadlines are calculated. Buildings can have their own building-specific calendar, otherwise each district will have a District Default calendar. If there is no Building calendar or District Default calendar, it could potentially cause data issues.



It's best to fill out calendars at least three years into the future (with at least a start and an end date) to accommodate for reevaluation deadlines.



Steps *To add calendars:*

1. While logged in as an administrative user, navigate to **Settings** > **Building Calendars**.
2. Select the building you wish to update calendars for or choose to update the District Default calendar.
3. To add a calendar for a new year, under **Add A New School Year**, give the calendar a name, enter start and end dates, and click **Add**.
4. To add a break, under **Break/Day Off**, give the break a name, enter start and end dates, and click **Add**.

Tip Users can view deadlines, program badges, and report information for students they have an educational interest in.