Permanently Purge Student Record/Document

Purge student documents

On rare occasions a student(s) and/or student's document(s) may need to be permanently purged from an environment within SameGoal. This may occur when legally requested by an outside legal entity or information was mistakenly imported to an environment.

Following the process below, an administrative user will permanently and irrevocably purge the selected information from their environment in SameGoal. Once completed, the information will no longer be retrievable. For a majority of instances, we recommend deleting students and deleting documents within SameGoal to ensure the ability to retrieve the information if deleted in error.

- Requesting a data purge window
- Schedule a document purge
- Cancel a document purge
- Schedule a student purge
- Cancel a student purge

Requesting a data purge window

To minimize accidental purging of student data, the purge feature is not available in environments by default. Once a data purge window has been requested, an administrative user will have a two week window to schedule and complete the student data purge.

Steps *To request a data purge window:*

1. An administrative user emails **help@samegoal.com** with the below information.
    - **Name of district**: The name of the district that requires the data purge.
    - **State**: The requesting district's state.
    - **Start date for purge window**: The beginning of the two week window you wish to schedule the purging of data.
    - **Reason for purge**: The reason data needs to be permanently purged.

Tip Once the request window has started, the administrative user will have two weeks from the start date to complete the scheduling of requested data purges.

Schedule a document purge

After a data purge window has been requested and the window has started, the document(s) that the administrative user wishes to purge may be scheduled by following the steps below. Note: once a data purge has been scheduled, the data will be permanently deleted from the environment in approximately one week's time. This allows for the option to cancel if any of the selected documents were scheduled in error.

Tip If purging documents from multiple students, we recommend having the students' ID numbers available before beginning the scheduling process.

Steps *To schedule document(s) to purge:*

1. Visit the document(s) you wish to purge. If the documents have not already been deleted within the environment, check the document(s) > click the **Actions** dropdown menu > select **Delete** > confirm that the documents should be deleted by clicking **OK**.
2. Visit **All** (left menu), click **Show: All Docs** in the blue bar, and then select 'Deleted'.
3. Page to the document(s) you wish to purge using the arrows at the top right.
4. Check the document(s) you wish to purge > click the **Actions** dropdown menu > select **Schedule purge**.
5. Follow the instructions in the pop-up dialog to schedule the data purge.
    - Confirm the student ID numbers of the student(s) whose documents are being purged. Use a comma-separated list if multiple.
    - Check the box to acknowledge that the user understands that this document purge will be associated with their account.
6. Click the **I understand the consequences. Schedule this purge.** button to schedule the document purge. Click **Cancel** if you wish to exit without scheduling the document purge.
7. Once the document purge has been scheduled, you will see a trash can with clock icon next to the lock icon on the document(s). The documents will permanently be deleted from the environment in approximately one week's time. If any document(s) were scheduled in error, you may cancel the document purge within the one week window.

Tip To ensure the selected document(s) are from the correct students, the student ID number(s) must match the checked documents before the option to schedule the document purge is available.

Tip If a document is scheduled to be purged with less than one week of data purge window remaining, the document will still be permanently removed from the environment. If a cancellation needs to occur outside of the two week data purge window, a new data purge window request must be made before the one week's time has expired.

Cancel a document purge

If a document(s) was scheduled to be purged in error, and it is within the approximate one week's scheduled data purge window, it may be canceled.

Steps *To cancel a document purge:*

1. Visit **All** (left menu), click **Show: All Docs** in the blue bar, and then select 'Deleted'.
2. Page to the document(s) you wish to cancel using the arrows at the top right.
3. Check the document(s) you wish to cancel the data purge for (document(s) scheduled for purge will have a trash can with clock icon next to the lock icon in line with the document.) > click the **Actions** dropdown menu > select **Cancel purge**.
4. The selected document(s) will no longer be scheduled to be purged from the environment. The trash can icon will no longer be visible next to the lock icon. If desired, an administrative user can also undelete the document to return it into the student's documents list.

Tip If a cancellation needs to occur outside of the two week data purge window, a new data purge window request must be made before the one week's time has expired.

Schedule a student purge

After a data purge window has been requested and the window has started, the student(s) that the administrative user wishes to purge may be scheduled by following the steps below. Note: once a data purge has been scheduled, the data will be permanently deleted from the environment in approximately one week's time. This allows for the option to cancel if any of the students were scheduled in error.

Before beginning a student purge, ensure that all of the student's documents have already been scheduled for purge. This helps to confirm that all the documents that belong to the student should be purged before removing the student permanently. If the student has documents that have not been scheduled for purge, an error message will appear when attempting to complete the scheduling of the student purge.

Tip We recommend having the students' ID numbers available before beginning the scheduling process.

Steps *To schedule a student purge:*

1. Visit the student you wish to purge after their documents have been scheduled to be purged. If the student has not already been deleted within the environment, visit **Students / create new** (left menu) > search for the student > select the student > click the **Actions** dropdown menu > select **Delete** > confirm that the student should be deleted by clicking **OK**.
2. Click **Deleted** in the gray bar, and search for the student.
3. Click the checkbox next to the student's name > click the **Actions** dropdown menu > select **Schedule purge**.
4. Follow the instructions in the pop-up dialog to schedule the data purge.
    - Confirm the student ID number of the student being purged.
    - Check the box to acknowledge that the user understands that this data purge will be associated with their account.
5. Click the **I understand the consequences. Schedule this purge.** button to schedule the student purge. Click **Cancel** if you wish to exit without scheduling the student purge.
6. Once the student purge has been scheduled, you will see a trash can with clock icon next to the student's name. The student will be permanently deleted from the environment in approximately one week's time. If any student(s) were scheduled incorrectly, you may cancel the student purge within the one week window.

Tip If there are multiple students that need to be purged, you may repeat the steps above. If the students are found on the same screen (i.e. their last names are close), you may schedule multiple students by using a comma-separated list.

Tip In an abundance of caution, the student ID number(s) must match the checked student name before the option to schedule the student purge is available.

Tip If a student is scheduled to be purged with less than one week of data purge window remaining, the student will still be permanently removed from the environment. If a cancellation needs to occur outside of the data purge window, a new data purge window request must be made before the one week's time has expired.

Cancel a student purge

If a student(s) was scheduled to be purged in error, and it is within the approximate one week's scheduled data purge window, it may be canceled.

Steps *To cancel a student purge:*

1. Visit **Students / create new** (left menu) and click the **Deleted** check box in the gray bar.
2. Search for the student whose scheduled purge should be canceled.
3. Check the student you wish to cancel the data purge for (student(s) scheduled for purge will have a trash can with clock icon next to their name.) > click the **Actions** dropdown menu > select **Cancel purge**.
4. The selected student and their documents will no longer be scheduled to be purged from the environment. The trash can icon will no longer be visible next to name. If desired, an administrative user can also undelete the student.

Tip If a cancellation needs to occur outside of the two week data purge window, a new data purge window request must be made before the one week's time has expired.