

Service Logs

After your district's first year on SameGoal, some document information will pull from completed documents into new documents to help save you time. For example, when you create service logs, information such as meeting dates, goals/objectives, and services can pull from the student's plan document automatically.

However, during your district's first year on SameGoal, information won't auto-populate documents because you won't yet have documents authored in SameGoal. You may have "stub" documents (documents populated with only the most basic program information) and **Upload** documents (with PDF attachments of documents authored in your previous system).

Populate service logs with information

In order to populate a document (such as a new service log) with information from the plan, you can copy from an **Upload** document rather than retyping all of the information.

Steps *To copy and paste information from an Upload document:*

1. Navigate to the student's **Documents** tab.
2. Locate the **Upload** document that has an attachment containing the desired information.
3. Open the document in a new tab.
 - Center click on the link or
 - Right click on the link and select **Open link in new tab** or **Open link in new window**.
4. In your current tab, open the service log you want to populate.
 - Such as a Related Service Log, Instructional Service Log, etc.
5. In the new tab with the **Upload** document, go to the **Attach** tab in the top right corner and click on the attachment to preview it.
6. Click and drag your windows such that each tab is visible on your screen.

- You may need to click and drag one of the tabs so it pops out and creates a new window.
7. While looking at both documents, find the desired information in the PDF attachment.
 8. Highlight the content and copy it.
 9. Click into the SameGoal service log, click into the appropriate field, and paste the information.
 10. Do this for everything you would like to copy over.

💡 Tip If you are filling out a service log to be used for Medicaid billing, goals/objectives and meeting dates must be filled out. When copying/pasting information into a service log, you should copy over goal and meeting date information. You may also choose to copy over service information, but it is not required for Medicaid billing.