samegoal

We've helped hundreds of districts implement SameGoal successfully with a 99%+ annual retention rate.

We are excited to have you join our community!

Below are standard implementation steps we recommend districts consider and which we go through on a typical implementation planning call. Many are quick, can be done in parallel and/or are optional.

How fast or slow your implementation goes is typically up to your district. We've done lightning speed setups one day with training the next, while some are planned over the course of a year. No matter your district's situation, we are dedicated to working with your district team to help ensure your implementation is successful.

Implementation Steps

Step	Special Programs Team	IT Team	Time
1. Planning Call	X	X	~1 hr
2. Environment		X	~1 hr
3. Authentication		X	~1 hr
4. SIS integration		X	~8 hrs (setup, verification)
5. PDF migration	X	X	Varies
6. Bulk load key program data	X		~1-3 days (varies)

7. Medicaid integration	X		~1 hr
8. TestHound integration	X		~1 hr (excluding mapping)
9. Other third party integrations	X	X	Varies
10. District Settings	X	X	~1-2 hrs
11. District banks	X		Varies
12. Bulk load users	X		~2-8 hrs (varies)
13. Training	X		~1-2 hrs (planning)
14. Transition to general support	X		Post training

Planning Call

👥 Special programs team

👥⚙ Tech team

🕐 ~1 hr

Let's meet. On your planning call (typically 60 mins over Google Meets/Zoom), we'll:

- Discuss each implementation step
- Identify district and SameGoal stakeholders best suited to complete each step

- Set key dates and timelines required for a successful implementation

During the call, your implementation team will document the discussion and next steps. You'll get started by identifying:

- Special program teams going live on SameGoal
- District desired go-live date(s)
- Possible district training/PD dates
- Contract and/or access termination date for prior vendor
- Any other key district constraints/considerations

Please invite any key district staff that will help with implementation, including member(s) of your technical team that may be involved. As needed, we will schedule follow-up technical calls, but it is helpful to have both special programs and technical staff jointly set implementation expectations and timelines from the jump.

Environment

Tech team

🕐 ~1 hr
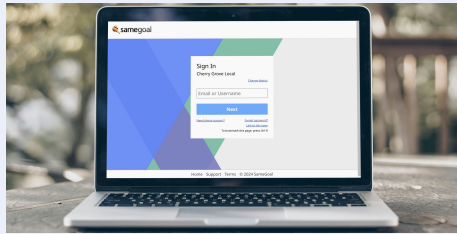
Gain initial software access. Confirm your district's email domain with your implementation team. This domain will become the unique identifier for your district's SameGoal environment (e.g. applegrove.k12.ca.us).

Once confirmed, we will create your environment, as well as user accounts for key district staff involved in implementation. New users will receive an email once their account is created. To log in:

- Your district-specific login URL after setup will be http://samegoal.com/iep/a/domain (e.g. https://samegoal.com/iep/a/applegrove.k12.ca.us)
- Staff can also always log in by clicking the "Sign In" button on samegoal.com in the top right, then select the district in the district directory.

💡 Tip Add a district-specific login page link with our logo to your district website that's easy to spot (optional).

💡 Tip If your district uses ClassLink, users will log in by clicking the SameGoal app icon on their LaunchPad.

Authentication

👥⚙ Tech team

🕐 ~1 hr

Decide how district users will authenticate. We recommend districts use single sign-on (SSO) or LDAP/Active Directory to streamline user authentication when possible. SameGoal supports:

- OpenID Connect Identity Providers (SSO)
    - Google OpenID Connect Configuration
    - Microsoft Entra OpenID Connect Configuration
    - General Configuration (OneLogin, Duo, etc)
- Classlink SSO
- LDAP/Active Directory

💡 Tip If your district uses a different OpenID Connect identity provider than listed above, SSO should work "out-of-the-box" provided the IP follows the OpenID specification. See General Configuration.

💡 Tip Many districts contract with outside providers that do not have a district email address and/or are not in the district's authentication scheme. These users can be added to SameGoal, and set to authenticate with a password instead. They do not need to be added to your authentication server.

SIS Integration

👥⚙ Tech team

🕐 ~8 hrs (setup, verification)

Set up SIS integration. SameGoal can integrate with student information systems (SISs) in three main ways:

- Demographics integration *(SIS -> SameGoal)*
- Alerts/document viewer integration *(SameGoal -> SIS)*
- State reporting integration *(SameGoal -> SIS)*

Integration methods available vary by SIS:

- Ascender
- eSchoolPLUS
- Infinite Campus
- PowerSchool
- ProgressBook
- Skyward SMS
- Skyward Qmlativ

If your SIS is not listed above, does not support a streamlined integration method, or does support a streamlined method but the district desires an alternative, see Other/Custom SIS.

Your implementation team will be able to provide feedback/options as needed.

💡 Tip **Set up demographics integration first.** Most other implementation steps block on having student demographics loaded into your environment. The remaining two integration methods are optional, and can be enabled at a later date.

PDF Migration

👥 Special programs team	
👤⚙ Tech team	
🕐 Varies	

Historical PDFs. SameGoal can automatically bulk import PDFs from your prior system. Depending on your prior vendor(s) and district size, your implementation team can recommend the best options for getting exported PDFs from your prior system loaded into SameGoal.

Steps *To migrate historical PDFs:*

1. Set a date by which all documents will be completed/finalized in your prior system.
2. Extract PDFs from your prior system.
3. Bulk import these PDFs into SameGoal.
4. **Required:** Download and/or move extracted PDFs to a district location for long-term storage. Not all PDFs imported will be associated with a student in SameGoal when imported (e.g. if no matching student is found).

Each PDF will be uploaded to the student as an "Upload" document (owner will be *Archives*). The original PDF will appear as an attachment to this document. Users may review and copy/paste from these PDFs as necessary. They may also star these documents to identify the most important ones to them, thereby placing these documents on their caseload and the associated students on their "My Students" list.

💡 Tip The bulk PDF importer attempts to associate PDFs with students already in SameGoal; it will not create students in SameGoal if they do not already exist. For this reason, a demographics integration must first be set up with your SIS before PDF import.

💡 Tip Because most SISs send information for students enrolled in the current school year, PDF association "out-of-the-box" will only attach PDFs to students enrolled during the current school year.

💡 Tip **Optional:** If you wish to bulk load PDFs for students not enrolled during the current school year, you can optionally do a one-time bulk load of historical students. To do so, populate students.csv with only required fields populated (see spec). For *District Enrollment*, you may set *INACTIVE*. This file can be imported by visiting **Settings > Bulk Loader** using an administrator account.

Bulk Load Key Program Data

👥 Special programs team

🕐 ~1-3 days (varies)

Bootstrap your environment. "Key program data" from your prior system can be loaded into SameGoal when provided in the format shared during your planning call. Loading this data is optional, but can be a helpful way to bootstrap the system. This data:

- Creates "stub" documents in SameGoal.
- Stub documents "badge" students as participating in each Special Program.
- Stub documents set annual and triennial deadlines.
- Each stub document can be assigned to a particular user (owner) during load.
  - The user is assigned deadlines going forward for the student for that category of program documentation.
  - The stub document is automatically starred and placed on the user's caseload.

Additionally, other users that work with the student can star these documents, thereby placing these documents on their caseload and the associated students on their "My Students" list. The data in these documents is also "live" and included in reports.

Medicaid Integration

👥 Special programs team

🕐 ~1 hr

Integrate Medicaid information. SameGoal partners and integrates with Medicaid billing providers.
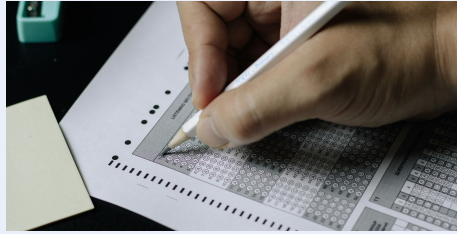
Steps *To set up the integration:*

1. Sign and return a *Data Sharing Agreement:* provided to you.
2. Your implementation team will initialize a data export.
3. Approve the API access email you receive for data export,
4. Turn off the data feed from prior system to your Medicaid vendor.
5. Confirm "cutover" date.
    - Data from documents with a primary date on or after the cutover date will begin flowing from SameGoal to your Medicaid vendor nightly.

💡 **Tip** No district IT assistance is required to set up export.

TestHound Integration

Special programs team

🕐 ~1 hr (excluding mapping)

Integrate testing accommodations. SameGoal partners and integrates with TestHound, a testing coordination software vendor.

Steps *To set up the integration:*

1. Sign and return the TestHound Data Sharing Agreement.
2. Your implementation team will initialize a data export.
3. Approve the API access email you receive for data export.
4. Confirm "cutover" date.
   - Data from documents with a primary date on or after the cutover date will begin flowing from SameGoal to TestHound nightly.
5. Your district assessment coordinator must "map" accommodations from SameGoal in TestHound the same way they do for other vendors. TestHound support can assist with this step if required.

💡 Tip   No district IT assistance is required to set up export.

Other Third Party Integrations

👥 Special
programs team

👤⚙ Tech team

🕐 Varies

Integrate other third-party applications. This is not too common, but every now and then districts have additional third-party applications they wish to sync data from SameGoal to. The SameGoal API:

- Exposes each report as an API endpoint
- This endpoint can be configured to send CSV (and/or JSON) files over SFTP nightly (most common API use)
- This endpoint can also be accessed at any time (REST-based API)

Your implementation team may be able to suggest/recommend the best API configuration for a particular integration/vendor.

District Settings

** Special programs team**

** Tech team**

** ~1-2 hrs**

Review district settings options. We typically have a meeting to go over the various district settings options. During this meeting, we will provide you with information so that you can successfully configure items such as:

- User access/permissions
- District banks
- District calendars
- Forms and form translations
- Other administrative options:
  - Multi-factor authentication
  - Stored signatures
  - Automated translation
  - Automatic translation request approval

District Banks

👥 Special
programs team

🕐 Varies
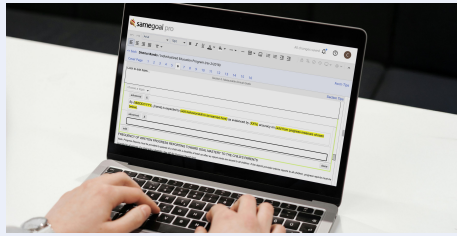
Help staff along. SameGoal allows districts to create district banks and default templates which auto-populate into fields when a document is created. While optional, populating district banks and templates (at least a few) helps users:

- See district content/language they are familiar with in a new program
- Better see how their previous processes will map into SameGoal
- Better understand district content expectations and process improvements
- Recognize and appreciate district admin staff buy-in to making the program successful
- See how authoring documents in SameGoal will save them time

Your implementation team may share example bank values and templates other districts in your state have agreed to make available.

Bulk Load Users

👥 Special
programs team

🕐 ~2-8 hrs
(varies)

Prepare to add users. Users can be manually added in the web interface at any time. However, it is usually helpful to bulk load users during implementation.

Before loading users, you will need to create user roles. User roles control form and report permissions in SameGoal.

Steps *To create user roles:*

1. Learn about user roles.
2. Create a user role for each user type in the web interface, keeping in mind form permissions.

💡 Tip When you are ready to create users manually in the web interface or bulk load them, you can set an unlimited number of user role and building combinations.

Once user roles have been created, users can be bulk loaded. However, we typically wait until the day of or day before training to run the bulk load because when the users are loaded, they immediately receive an email, which provides access. However, the User Loader Spreadsheet should be prepped in advance.

Steps *To bulk load users:*

1. Download the SameGoal User Loader Spreadsheet.

2. Populate and return the spreadsheet to your SameGoal implementation coordinator.

3. Your SameGoal implementation coordinator will bulk load the users into your environment.

💡 Tip You may add an unlimited number of users. This can optionally include general education staff.

💡 Tip Users typically should not be loaded until after the student demographics integration is set up and students are populated into your environment. This helps ensure users are assigned buildings which match students in your student information system (SIS).

💡 Tip Automated account provisioning is also available.

Training

👥 Special programs team

🕐 ~1-2 hrs (planning)

Exciting! This is the time to share with your staff:

- Why the district is moving to SameGoal
- How to perform all the basic actions and workflows in SameGoal (SameGoal trainer)
- How prior district processes map into SameGoal (and/or what you're still figuring out) (district staff member)
- Additional opportunities/avenues to learn more and get support

Trainings work best when briefly opened by a district staff member, then passed to a SameGoal trainer. The SameGoal trainer will lead users through software training, but the district staff member may interject when helpful how a prior district process will now be handled in SameGoal and/or to answer district-specific questions.

Format: Training can be scheduled:

- In-person
- Remotely
- In either format as train-the-trainer

Time: In general, and if your PD time allows, we recommend:

- ~2.5-3 hr sessions per role for Special Education, ~2-2.5 hr sessions for roles in other special programs

- An additional ~1.5-2 hr session for admins (assuming they also attend a non-admin training for staff they oversee)
- Leaving the last 15-30 minutes of each training open for questions (also provides some flexibility in scheduling)
- That said, we can generally work within the time constraints your district has available if more limited

Number of attendees: We can perform trainings for staff of any size.

- *In person:* Number of attendees recommended depends on school facilities available. Attendees should have space and power available to work comfortably. Typically, in-person trainings of up to 40-50 staff require one trainer, whereas a training in a gym with 100 attendees requires at least two.
- *Remote:* Unlimited attendees. When large group sizes are expected, an additional SameGoal trainer will attend to assist with chat/questions.

Content: Though trainings can be modified as needed, we typically follow this training guide

Expectations: All attendees should plan to bring a laptop and work in the software during the session.

- Attendees are typically assigned a training student to work with.
- Near the end of training, attendees will work with/verify real students and documents they work with.
- Training students can remain in the environment as long as desired, and be deleted by the district at any time.

Cancellations: Trainings cancelled less than 24 hours in advance are non-refundable or transferrable.

Minimum training requirements: It's great when districts can complete all implementation steps prior to training. That said, we know sometimes things just get busy for districts. As long as we have an environment created and can add user accounts prior to training (or at the door), training can be conducted in your environment with training students.

Transition to General Support

👥 Special
programs team

🎉 Get excited!

After your district has completed training, your SameGoal implementation team will continue to check in over the course of your first several months to ensure everything is running smoothly. Additional avenues of ongoing support available to all district users include:

- Daily helpdesk
- Online guides
  - First Year Guide
  - User Guide
  - Administrative Guide
  - Technical Guide
  - Recent Webinars
- In-app notifications of program updates
- Blog descriptions of updates
- Events (online fall/spring refresher trainings and product update webinars) (must be logged in to access)