samegoal

Training Outline

Print this out and use it to follow along and pace yourself while leading a training (based on a 2 hour training duration).

Getting Started (20 minutes)		
Introduction to SameGoal	5 minutes	• **Discussion:** What is SameGoal? • **Discussion:** Why the district is moving to SameGoal • **Discussion:** Overview of training
Logging In	10 minutes	• **Discussion:** How does login work for the district? • **Activity:** Log into SameGoal
Screen Overview	5 minutes	• **Discussion:** Working with test data • **Discussion:** Left menu navigation • **Activity:** Check building permissions
Creating Documents (10 minutes)		
Search for Students	4 minutes	• **Discussion:** Navigating to a student's Documents tab • **Activity:** Search for your test student • **Discussion:** Tabs on a student's page
Create a New Document	4 minutes	• **Discussion:** Create new dropdown

		• **Activity:** Make sure you have the correct form permissions • **Discussion:** If a student needs to be evaluated for Section 504 • **Activity:** Create a referral for your test student • **Discussion:** When a document is created
Autosave	2 minutes	• **Discussion:** SameGoal automatically saves changes made to a document • **Activity:** Explore autosave
Completing Documents (10 minutes)		
Completing a Document	8 minutes	• **Discussion:** All required fields must be filled out • **Activity:** Complete a document • **Discussion:** When a document is completed
Program Participation	2 minutes	• **Discussion:** Student will be under eligibility review for Section 504 • **Activity:** View a student's Programs tab
Parent Communication (10 minutes)		
Consent to Evaluate	3 minutes	• **Discussion:** You will need to obtain consent to evaluate • **Activity:** Create a Consent to Evaluate document
Overview	1 minutes	• **Discussion:** Demographics information is automatically populated
Share With Parents	3 minutes	• **Discussion:** Documents can be shared with parents electronically • **Activity:** Share your document with a parent

Prior Written Notice	3 minutes	• **Discussion:** You will need to send a Prior Written Notice to the parents • **Activity:** Create and begin filling out a Prior Written Notice
Collaboration (15 minutes)		
Evaluation	2 minutes	• **Discussion:** An Evaluation document will need to be created • **Activity:** Create and begin filling out an Evaluation
Sharing a Document	4 minutes	• **Discussion:** Documents can be shared with other users • **Activity:** Share a document with another user • **Discussion:** Permission levels • **Discussion:** When a document is shared with you
Collaborative Editing	5 minutes	• **Discussion:** Users can work in one document simultaneously • **Activity:** Work in a document with another collaborator
Chat	2 minutes	• **Discussion:** In-application chat allows staff members to securely message • **Activity:** Send a message using the Chat feature • **Discussion:** Chat is not attached to a specific document or student
Document History	2 minutes	• **Discussion:** Each document has a Document History panel • **Activity:** View events in the Document History panel

		• **Discussion:** Document History is helpful in several ways
Authoring Documents (15 minutes)		
Invite Parents to Meeting	3 minutes	• **Discussion:** You'll need to invite the parents to a meeting to develop the plan • **Activity:** Create and begin filling out a Section 504: Parent Invitation. • **Discussion:** After filling out the document, it will need to be shared with the parents
Initial Plan	3 minutes	• **Discussion:** The 504 team should begin developing the plan • **Activity:** Create and begin filling out the Section 504 plan
Rich Text Editing	3 minutes	• **Discussion:** When you click into a field, you will be able to format your text • **Activity:** Add text to a document and format it
Add and Remove Sections	3 minutes	• **Discussion:** Add buttons allow you to include additional sections and fields • **Activity:** Add and remove a section
Attachments	3 minutes	• **Discussion:** You can upload files and include them as attachments on documents • **Activity:** Add an attachment
Bank Values (10 minutes)		
User Banks	5 minutes	• **Discussion:** SameGoal has functionality to store frequently used text, which support name and pronoun substitution • **Activity:** Create and use a user bank value

		• **Discussion:** Saved banks are available in every document of the same form type
District Banks	5 minutes	• **Discussion:** District banks are made by admin and are available to all users • **Discussion:** District and user banks can utilize topics and keywords • **Demonstration:** Show how to create topics and keywords • **Discussion:** District banks can be added as default values
Meetings and Signatures (15 minutes)		
Validations	5 minutes	• **Discussion:** Documents run validation checks • **Activity:** Explore validation checks • **Discussion:** Validation Mode allows you to quickly go through remaining errors • **Activity:** Enter into Validation Mode • **Discussion:** Documents can't be completed until all validation checks pass
Holding Meetings	3 minutes	• **Discussion:** It's recommended you enter into Meeting Mode for meetings • **Activity:** Share a meeting and enter into Meeting Mode • **Discussion:** Parents can follow along electronically during a meeting
Signatures	4 minutes	• **Discussion:** Documents can be signed electronically • **Activity:** Electronically sign your document • **Discussion:** Signatures can be saved to your account to "stamp" into signature fields • **Activity:** Store your signature

Translation	3 minutes	• **Discussion:** Documents can be translated directly within SameGoal • **Activity:** Request a document translation • **Demonstration:** Show a translated document • **Discussion:** Meeting recordings can be uploaded as an attachment to the document
Additional Tools (10 minutes)		
Printing a Document	5 minutes	• **Discussion:** Documents can be previewed, printed, or downloaded at any point • **Activity:** Print a document with attachments • **Discussion:** Documents will have a DRAFT watermark before they are marked complete
Clerical Errors	1 minute	• **Discussion:** Documents can be marked incomplete by admin users
Copy From an Existing Document	4 minutes	• **Discussion:** Documents can be created by copying from existing documents to save time • **Demonstration:** Create a new document by copying from a completed document • **Discussion:** When the document is created, information will pull in from the previous document
Wrap Up (5-30 minutes)		
Support	5 minutes	• **Discussion:** SameGoal has many online support resources • **Activity:** Access SameGoal's support resources
Questions	Varies	• **Discussion:** Ask questions

Explore Your Environment	Varies	• **Activity:** If time, explore your environment