

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	<ul style="list-style-type: none">• Discussion: What is SameGoal?• Discussion: Why the district is moving to SameGoal• Discussion: Overview of training
Logging In	10 minutes	<ul style="list-style-type: none">• Discussion: How does login work for the district?• Activity: Log into SameGoal
Screen Overview	5 minutes	<ul style="list-style-type: none">• Discussion: Working with test data• Discussion: Left menu navigation• Activity: Check building permissions
Creating Documents (10 minutes)		
Search for Students	4 minutes	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none">• 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	<ul style="list-style-type: none"> • Discussion: SameGoal automatically saves changes made to a document • Activity: Explore autosave
Completing Documents (10 minutes)		
Completing a Document	5 minutes	<ul style="list-style-type: none"> • Discussion: All required fields must be filled out • Activity: Complete a document • Discussion: When a document is completed
Program Participation	2 minutes	<ul style="list-style-type: none"> • Discussion: Student will be under eligibility review for Section 504 • Activity: View a student's Programs tab
Deadlines	3 minutes	<ul style="list-style-type: none"> • Discussion: See info by hovering over the program badge • Activity: View a student's Deadlines tab • Discussion: Deadlines calendar • Activity: View the Deadlines calendar
Parent Communication (10 minutes)		
Consent to Evaluate	3 minutes	<ul style="list-style-type: none"> • Discussion: You will need to obtain consent to evaluate • Activity: Create a Consent to Evaluate document
Overview	1 minutes	<ul style="list-style-type: none"> • Discussion: Demographics information is automatically populated • Discussion: Moving through a document
Share With Parents	3 minutes	<ul style="list-style-type: none"> • Discussion: Documents can be shared with parents electronically • Activity: Share your document with a parent
Prior Written Notice	3 minutes	<ul style="list-style-type: none"> • Discussion: You will need to send a Prior Written Notice to the parents • Activity: Create and begin filling out a Prior Written Notice

		<ul style="list-style-type: none"> • Discussion: Once the documents are completed, a new deadline will be triggered
Collaboration (15 minutes)		
Evaluation	2 minutes	<ul style="list-style-type: none"> • Discussion: An Evaluation document will need to be created • Activity: Create and begin filling out an Evaluation
Sharing a Document	4 minutes	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: Users can work in one document simultaneously • Activity: Work in a document with another collaborator
Chat	2 minutes	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: You'll need to invite the parents to a meeting to develop the plan • Activity: Create and begin filling out a Notice of 504 Team Meeting. • Discussion: After filling out the document, it will need to be shared with the parents

Initial Plan	3 minutes	<ul style="list-style-type: none"> • Discussion: The 504 team should begin developing the plan • Activity: Create and begin filling out the Section 504 plan
Rich Text Editing	3 minutes	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: Add buttons allow you to include additional sections and fields • Activity: Add and remove a section
Attachments	3 minutes	<ul style="list-style-type: none"> • Discussion: You can upload files and include them as attachments on documents • Activity: Add an attachment
Bank Values (10 minutes)		
User Banks	5 minutes	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: Documents run validation checks • Activity: Explore validation checks

		<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: Documents can be signed electronically • Activity: Electronically signs your document • Discussion: Signatures can be saved to your account to "stamp" into signature fields • Activity: Store your signature
Translation	3 minutes	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • Discussion: Documents can be marked incomplete by admin users
Amendments	4 minutes	<ul style="list-style-type: none"> • Discussion: To make a significant change, documents can be amended • Demonstration: Create a formal amendment

Wrap Up (5-30 minutes)

Support	5 minutes	<ul style="list-style-type: none">• Discussion: SameGoal has many online support resources• Activity: Access SameGoal's support resources
Questions	Varies	<ul style="list-style-type: none">• Discussion: Ask questions
Explore Your Environment	Varies	<ul style="list-style-type: none">• Activity: If time, explore your environment