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	5 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
Deadlines	3 minutes	**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	**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

		• **Discussion:** Moving through a document
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 • **Discussion:** Once the documents are completed, a new deadline will be triggered
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 Notice of 504 Team Meeting. **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
Amendments	4 minutes	**Discussion:** To make a significant change, documents can be amended **Demonstration:** Create a formal amendment

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