Section 504 Training Script

Before using this script to train users, make sure you've read through the Training Manual and completed the required preparation.

TABLE OF CONTENTS

Here is a training outline and timing sheet that you can print out and use to help pace yourself during training.

LESSON: GETTING STARTED

Time: 20 minutes

Skip:

- Skip **Discussion 1** in the **Screen Overview** topic if real data has not yet been loaded into the environment. This discussion calls out that we will be focusing solely on test data during the training.
- Skip the **Deadlines** paragraph of **Discussion 2** in the **Screen Overview** topic if the district is on the **Standard** edition of SameGoal. This discussion covers the Deadlines page, which is only available with higher editions.
- Skip **Activity 1** in the **Screen Overview** topic if students have not yet been loaded into the environment. This activity prompts attendees to search for students in their buildings.

TOPIC: INTRODUCTION TO SAMEGOAL

Discussion 1: SameGoal is a documentation management and compliance platform for special programs with over a 99% annual retention rate. SameGoal has been serving districts since 2008 and supports several special programs.

Discussion 2: Discuss the reasons why the district decided to switch to SameGoal as well as which problems SameGoal will help to solve.

Discussion 3: During this training we will cover topics such as:

- Creating documents
- Working within documents
- Tools for collaboration, saving time, and compliance
- Holding meetings
- Completing documents
- More

I will be logged into the environment demonstrating the functionality as we work through the different topics and you will also be able to complete several activities where you can try completing different workflows in the application yourself.

TOPIC: LOGGING IN

Discussion 1: Discuss how login works for the district (SSO, ClassLink, OIDC, etc.).

Activity 1: Log into SameGoal.

1. Find your district login page:
   - The first time you log in, you should have received an email from SameGoal containing a link to sign in that will direct you to your district login page.
   - Otherwise, if your district has specific directions for users to access SameGoal, find your login page that way.
   - If not, navigate to the SameGoal homepage (samegoal.com), click on the **Sign In** button in the top right, search for your district by entering the name or city, and select your district.
2. Enter your login information:
   - If your district uses single sign-on, use your district credentials to log in. If there are issues with single sign-on, reach out to your district's tech department.
   - If this is your first time logging in and you do not use single sign-on, create a password and log in using your email and new password.

Important: Logging in can take a while. Make sure everyone is able to log in, and help those who are having difficulties.

TOPIC: SCREEN OVERVIEW

Discussion 1: During this training, you'll come across real students and real documents, but for the purpose of training, we will be working with test data. For the time being, please ignore the real data. If we have time at the end, you will get the chance to explore the environment, the students, and the documents a bit more.

Discussion 2: There are several different features and pages you can access from the left menu:

Dashboard: This page gives users a quick and easy way to see important information in SameGoal and will reduce the number of clicks needed to get to commonly used information.

Recent: This is the landing page when you log into SameGoal and it shows your 50 most recent documents. If you leave a document to work on other students, you can easily come back to what you were working on. Additionally, all documents you've been working on are all in one place.

Caseload: Shows the documents you are actively working on. You can control which documents appear here by adding and removing documents throughout the year as what you're working on changes. We will discuss how to manage your Caseload later.

My Students: All students who have at least one document on your Caseload. This list is dynamic and will change as you work on documents year to year. If you add a student's document to your Caseload, if they are not already on your My Students list, they will be added. Once a student no longer has any documents on your Caseload, they will be removed from My Students.

Chat: You can switch from the My Students tab to the Chat tab by clicking on the chat box icon. This allows you to securely message other online colleagues. To switch back to My Students, you can click back to the student icon.

All: Lists all of the documents you have access to, given your permissions; whether it was explicitly shared with you or because your administration gave you default access to the form type.

Deadlines: A calendar of any deadlines that have been assigned to you. You can also display deadlines for students who you have an educational interest in, even if the deadlines are not assigned to you. Deadlines are calculated by SameGoal automatically when documents are completed and are assigned to whoever the owner of the previous document was.

Students / create new: This is a list of all students you have access to based on your building permissions, which are controlled by your administration. Students are automatically added and updated each night based on a SIS demographics integration. All students are added, regardless of program participation status. This means if a student needs to be evaluated, they don't need to be added to the system first.

Reports: This page will list all reports you have access to run given your report permissions set by your admin users. When you run a report, you are able to see information from documents you have access to.

Activity 1: Make sure you have the correct building permissions by searching for students.

1. Navigate to the **Students / create new** page.
2. Search for one student in each of the buildings you work in.
    - If you have access to one student in the building, you should have access to all students in the building, so you only need to check one student per building.
3. To search for a student, at the top of the page, enter their name in the **First name** and **Last name** fields or enter their student ID in the **Student ID(s)** field.
4. Click **Search**.
5. If you are not able to find a student you would expect to see, make note of it so you can work with your administration to update your building permissions.

LESSON: CREATING DOCUMENTS

Time: 10 minutes

Preparation: Assign everyone in training a number associated with a test student. Test005 through Test250 are available.

TOPIC: SEARCH FOR STUDENTS

Discussion 1: In order to create a document for a student, you will first need to find that student and navigate to their **Documents** tab. You can do this by clicking on their name in your **My Students** list if they are listed there, or by searching for them on the **Students / create new page**.

Activity 1: Search for your test student.

1. While on the **Students / create new** page, in the **Last name** field, enter your test student's name in the format "Test###".

   Important: As the trainer, use Test001.

2. Click **Search**.
3. Click on your test student's name to be brought to their **Documents** tab.

Discussion 2: There are several tabs on a student's page:

- **Documents:** Lists all of a student's documents you have access to and is also where you can create new documents for the student.
- **Deadlines:** Lists upcoming and past due deadlines which are automatically calculated by SameGoal.
- **Programs:** Displays a timeline of programs the student has participated in, which is automatically calculated by SameGoal.
- **Details:** Contains student and parent demographic information, which is updated nightly based on a demographics integration with your SIS. You are only able to see

this tab if you have an educational interest in the student.

- **Basics:** Contains basic enrollment information and is also updated nightly based on the SIS integration. This tab is only available to administrative users.

TOPIC: CREATE A NEW DOCUMENT

Discussion 1: When you click into the **Create new** dropdown at the top of a student's Documents tab, you can see all of the forms you have permission to create. Again, this access is set by your administration.

Activity 1: Make sure you have the correct form permissions.

1. While on your test student's **Documents** tab, click into the **Create new** dropdown at the top.
2. Scroll through the list of forms and make sure you are able to see all form types you would expect to be able to create.
   - Forms are listed alphabetically by program.
3. If you don't see a form you would expect to see, make note of it so you can work with your administration to update your form permissions.

Discussion 2: If a student needs to be evaluated for Section 504, they will first need to be referred to the program. To refer a student, you'll need to create a **Section 504: Referral.**

Activity 2: Create a referral for your test student.

1. While on your test student's **Documents** tab, click into the **Create new** dropdown at the top.
2. Search for a **Section 504: Referral** by scrolling through the list or by typing the name of the form.
3. Click on the form type.
4. Click **Create**.

Discussion 3: When you create the document:

- The new document will open for you.

- The student will be added to your **My Students list**.
- The document will be added to your **Caseload**.
- The document will appear at the top of your **Recent page**.

TOPIC: AUTOSAVE

Discussion 1: While working in documents, you will not have to manually save your work. Rather all document edits are autosaved, and you can see the save status in the top right of the document. Changes are saved every time you click out of a field or every few seconds while working within a field, so there is never a risk of losing more than a few seconds worth of work.

Activity 1: Explore autosave.

1. Quickly fill out field **3** toward the bottom of the page.
2. When you type, notice how the save status changes to **Unsaved changes**.
3. Click out of the field and notice how the save status now changes back to **All changes saved**.
4. Try this for field **4** as well.

LESSON: COMPLETING DOCUMENTS

Time: 10 minutes

TOPIC: COMPLETING A DOCUMENT

Discussion 1: Documents cannot be completed until all required fields are filled out and there are no data errors with the document (except when bypassed by administrative users).

We will learn more about validation checks later, but for now, we will quickly fill out the rest of the document so we can mark it complete.

Activity 1: Complete a document.

1. Fill out the remainder of the required fields (marked with a red asterisk):
    - Check the suspected physical or mental impairment
    - Date Received (enter today's date)
2. Click the lock icon in the toolbar.
3. Select **Complete**.

Discussion 2: When a document is completed:

- It is no longer editable.
- Program participation is updated automatically.
- Services become reportable.
- Information is sent back to your SIS via integration.

TOPIC: PROGRAM PARTICIPATION

Discussion 1: When the referral is completed, your student will automatically be pre-enrolled in Section 504 and a gray badge will appear next to their name. In order to see more information about program participation, you can view the participation timeline on the student’s **Programs** tab.

Activity 1: View a student’s Programs tab.

1. Click on your student’s name to be brought to their **Documents** tab.
2. Switch to their **Programs** tab.
3. Notice that the timeline has an entry noting that the student is now under eligibility review for Section 504.

LESSON: PARENT COMMUNICATION

Time: 10 minutes

Skip:

- Skip the **Share with Parents** topic if the district is on the **Standard** edition of SameGoal. This functionality is only available with higher editions.

TOPIC: CONSENT TO EVALUATE

Discussion 1: After creating a referral, you'll need to send a Prior Written Notice to the parents and obtain their consent to evaluate the child. First, let's create a **Section 504: Parent Consent** document to pass along to the parents in order to obtain their consent.

Activity 1: Create a Consent to Evaluate document.

1. Navigate back to your test student’s **Documents** tab by clicking on their name in you My Students list.
2. In the **Create new** dropdown, search for the **Section 504: Parent Consent** and click **Create**.

TOPIC: OVERVIEW

Discussion 1: You may have noticed that when a new document is first created, demographics information on the cover page is automatically populated. This information is pulled in from the student's **Details** tab (which is updated nightly based on an active demographics integration). If information has been updated on the Details tab since the document was first created, you can click the **Update Student Information** button at the top of the document to re-pull the data.

TOPIC: SHARE WITH PARENTS

Discussion 1: After providing relevant information in the consent document, you'll need to share it with the parents in order for them to fill out the consent section. Documents can be shared with parents electronically and they are able to fill out the **Parent** section of the document.

Activity 1: Share your document with a parent.

1. Navigate to the **Share** tab in your document.
2. Click on **Add Parent/Guardian**.
3. For Guardian, click the **Select** dropdown and choose **Enter manually**.

   Important: As the trainer, if you added a guardian email during preparation, show that when guardian emails are loaded from the SIS, they will appear in the Guardian dropdown automatically. If you did not prep this, verbally explain it to attendees.

4. Provide a fake first and last name.
5. In the **Email** field, you would typically enter the parent's email address, but for now, you can enter in your own personal email (for training purposes).

   Callout: Do not use a fake email because you could accidentally send it to someone's real email. You may choose to leave the field blank if you do not want to provide your own, but you will get an error when you try to send.

6. Optionally, change the permission.
7. Optionally, include a note.
8. Hit **Send**.
9. Hit **OK** if you get a popup warning. The parent should be added to the Collaborative Team.
10. Hit **OK** again to close the **Update Collaborators** window.

TOPIC: PRIOR WRITTEN NOTICE

Discussion 1: The other document that will need to be created is a prior written notice to provide the parents with more information regarding the proposed action.

Activity 1: Create and begin filling out a Prior Written Notice.

1. Navigate back to your test student's **Documents** tab by clicking on their name at the top of the document.
2. In the **Create new** dropdown, search for the **Section 504: Prior Written Notice** and click **Create**.
3. In the document, select **Initial Section 504 Evaluation** as the type of action.

LESSON: COLLABORATION

Time: 15 minutes

Preparation: Organize attendees into groups of 2 or 3. You can either place attendees in groups yourself or allow them to find their own partners. It will be easiest if partners are seated next to each other. As the trainer, it will be helpful if you also have a partner to demonstrate with.

TOPIC: EVALUATION

Discussion 1: After parents grant their consent to an evaluation, a **Section 504: Evaluation** document will need to be created for the evaluation team to collaborate on.

Activity 1: Create and begin filling out an Evaluation.

1. Navigate back to your test student's **Documents** tab.
2. Create a **Section 504: Evaluation**.
3. In the document, select **Initial 504 Evaluation** as the meeting type.
4. Enter a meeting date.

TOPIC: SHARING A DOCUMENT

Discussion 1: Once basic information has been entered in the document, you'll want to add additional collaborators to it so they may contribute.

Activity 1: Share a document with another user.

1. In your document, navigate to the **Share** tab in the top right corner of your screen.
2. On the **Add User** side, search for your partner or partners by username or email.

3. Locate your partner's name in the results list and click on their name to add them to the Collaborative Team.
4. If you have two partners, repeat the process to share the document with your other partner.
5. You can leave permissions as **Can Edit**. Once you are finished, click **Save**.

Discussion 2: You may have noticed that by default, other staff are added to the Collaborative Team with **Can Edit** permission. When sharing a document you can determine which level of access other collaborators will have. The document access granted through explicitly sharing a document with a user might be different from the default access granted to them by administration.

- **Is Owner:** If you create a document, you are automatically assigned as the Owner. Owner permissions allow a user to add and remove collaborators, as well as complete, amend, delete, and undelete the document.
- **Can Edit:** Allows a user to edit the document and add/remove attachments.
- **Can View:** The document will be ready-only to the user.
- **Remove:** No access/removes the user from the document.

Discussion 3: When a document is shared with you:

- The document will be automatically starred and will appear on your **Caseload**.
- The student will appear on your **My Students** list since they have at least one document on your Caseload.
- The document will appear at the top of your **Recent** tab.
- You will receive a notification (unless you manually disable notifications).

TOPIC: COLLABORATIVE EDITING

Discussion 1: There is no limit to how many users a document can be shared with and multiple collaborators may work in one document simultaneously without the risk of overwriting each other's work. When another user is working in the same document as you, a concurrent user icon will pop up in the top right and you'll be able to see their edits in real time.

Activity 1: Work in a document with another collaborator.

1. Discuss with your partner(s) and decide on whose document you will collaborate on. Only select one of your documents.
2. Navigate to the document you will be working in by finding it on your **Caseload** or **Recents** tab and clicking on it or by clicking on the notification in your notifications tray (bell icon).
3. When you enter the same document as your partner, you will see their name card in the top right corner. Hover over the name card in order to see their full name.
4. Next, take turns clicking into different fields.
    - When your partner clicks into a field, you will see their name covering the field.
5. Try to click into a field while your partner is in it.
    - You will not be able to enter a field while another user is clicked into it. However, if they are inactive for 5 minutes, they will be removed from the field so other users can enter it.
6. Make edits to the document and type something into a text field.
    - You'll notice when your partner makes edits to the document, you can see all of their edits in real time.

TOPIC: CHAT

Discussion 1: If you see another team member in the document at the same time, you can easily start a chat with them by clicking their card in the top right. In-application chat is a way to speed up communication between staff members and foster professional collaboration.

Activity 1: Send a message using the Chat feature.

1. While still in the same document as your partner(s), click on their name card in the top right in order to open a chat box with them.
2. Send a message to your partner using the chat box.
3. Once you receive a message back from your partner, you can close the chat box by clicking the **X** in the top right corner.

Discussion 2: It's important to note that chat is not attached to the educational record for a given student and is not stored with the document in any way. You can start or continue a chat with another online team member by navigating to the Chat tab in the left menu.

TOPIC: DOCUMENT HISTORY

Discussion 1: Even with potentially several users all collaborating on one document, there is never a risk of losing your work due to another staff member entering the document and making unwanted changes or removing your work. SameGoal has a **Document History** panel in every document that is available to any user with access to the document.

Activity 1: View events in the Document History panel.

1. Click on the clock icon on the right side of the toolbar to open the **Document History** panel.
2. Scroll to an event and click on it.
   - Notice that you can see all of the changes you and your partner(s) made and when you click on an event, the page will scroll to the field that was changed.
3. Exit out of Document History by clicking on the icon in the toolbar again.

Discussion 2: Document History is helpful in several ways:

- For every change made to a field, you can see an **Event** that lists the date and time that the change was made, as well as the user who made the change. This helps to answer any questions about edits that were made to a document.
- When viewing a historical Event, the document will appear exactly as it was when that change was made and you can even print the historical version of the document.
- If information was accidentally removed or changed, you can bring up the document in the Document History panel from before the change was made and copy and paste the information from the historical version into the current version.

LESSON: AUTHORING DOCUMENTS

Time: 15 minutes

TOPIC: INVITE PARENTS TO MEETING

Discussion 1: If the evaluation team determines that a Section 504 plan should be developed for the student, before the team can meet to develop the plan, a notice will need to be sent to the parents inviting them to the meeting.

Activity 1: Create and begin filling out a Section 504: Parent Invitation.

1. Navigate back to your student's **Documents** tab.
    - If you were previously in someone else's evaluation document, clicking on your test student's name in your My Student's list will automatically jump you into your student's evaluation document, rather than their Documents tab. Click on their name at the top of the document to be brought to their Documents tab.
2. Create a **Section 504: Parent Invitation** document.
3. In the document, select the purpose of **To develop, review, and/or revise your child's Section 504 plan**.

Discussion 2: After filling out the document with information about the meeting, it will need to be passed along to the parents. The document can be completed once they respond.

TOPIC: INITIAL PLAN

Discussion 1: The 504 team should begin developing the plan before meeting to review it and sign off on it with the parents.

Activity 1: Create and begin filling out the Section 504 Plan.

1. Navigate to your student's **Documents** tab.
2. Create a **Section 504: Plan** document.
3. Select **Initial 504 Plan** as the meeting type.

TOPIC: RICH TEXT EDITING

Discussion 1: Now let's learn about some tools that can help make document authoring easier. Authoring documents in SameGoal is very simple and works similarly to any other word processing application, including keyboard shortcuts, copying and pasting, and more.

When you click into a field, the rich text editing toolbar at the top of the screen becomes available. This allows you to format your text as you wish as well as insert tables and lists.

Activity 1: Add text to a document and format it.

1. In your document, click into a text field so that the formatting toolbar at the top becomes available.
2. Experiment with the formatting tools.
    - Select different formatting options and begin typing.
    - Highlight what you’ve already typed and change the formatting again.
    - Add a table by clicking on the table dropdown in the toolbar and selecting **Insert table**.

TOPIC: ADD AND REMOVE SECTIONS

Discussion 1: You might notice that several documents have various **add** buttons throughout them. These allow you to add additional sections to the document. You can also remove these sections if you don't need them using the **X** in the top right corner.

Activity 1: Add and remove a section.

1. In your document, search for a gray **add** button.

2. Click on the **add** button.
    - A new section should have been added.
3. Click on the **X** in the top right corner to remove the section.
4. When you get a popup warning asking if you want to delete the section, select **OK**.

TOPIC: ATTACHMENTS

Discussion 1: You can add information to documents by typing it or copying and pasting it in, but another way to include information in a document is by adding attachments.

Several different file types are supported. It can be helpful to attach examples of student work, submitted documentation from third parties, or even audio recordings from meetings.

Activity 1: Add an attachment.

1. In your document, click on the **Attach** tab in the top right corner of the document.
2. On the **Attach** tab, give the file a name.
3. Click **Choose File** to select a file from your computer.
4. If you would like to, select a file from your computer to attach. Otherwise you may just watch and follow along for the rest of the activity.

    Callout: Do not attach a file that contains sensitive information about a real student since this is a test student that many people have access to.

5. Once you've selected your file, click **Attach file**. All attachments will be listed on the Attach tab.
6. If the file is a PDF, document, image, or video, click on it to view the attachment in a new tab.
7. Close the viewing tab and return to the document by clicking on one of the section headers.

LESSON: BANK VALUES

Time: 10 minutes

TOPIC: USER BANKS

Discussion 1: SameGoal offers functionality to store frequently used text in text fields in any form. This tool is referred to as **Bank Values**. By storing text in banks, users can avoid needing to rewrite common content for each document.

Bank values support name and pronoun substitution. By typing “[Name]”, the student’s name will be substituted when adding the text to the document. Any gendered pronouns (he/she, his/hers, etc.) will also be automatically substituted to match the student’s gender.

User Bank Values can be made by any user and are only accessible to the user who created it.

Activity 1: Create and use a user bank value.

1. Navigate to Section 1 and click into the **Describe how the disability affects one or more major life activities** field.
2. In the green box that appears below the field, click **edit bank**.
3. Next, click **add** to begin creating a new bank value.
4. In the bank field, enter “[Name]'s disability impacts his..."
5. Click **done**.
6. Now, each time you click into the field, your stored value will appear.

    Callout: Notice that your student’s name will appear in place of “[Name]” and if you have a female student, the male pronouns will be replaced by female pronouns.

7. Click on the bank value to add it to the field.

Discussion 2: Saved banked values are available in every document of the same form type. If you were to work in a different Section 504 Plan, you would be able to use this stored value in the same field.

TOPIC: DISTRICT BANKS

Discussion 1: District banks are made by an administrative user and are accessible to all users in the district. District banks are denoted with a small building icon so you can tell them apart from your own user banks. District banks cannot be edited or deleted by non-administrative users.

District bank values can provide users with compliant text and suggestions and reduce the amount of bank value creation and management required at the user level.

Discussion 2: Both district banks and user banks may utilize **Topics** and **Keywords**. Topics help to group like values together, similar to putting the values in a folder together. Keywords basically give a bank value a title. This is useful when a bank value is very long and can help you identify the bank value quicker.

Demonstration 1: Show how to create topics and keywords.

1. Click into a field and select **edit bank**.
2. Click **add**.
3. Click on the **advanced** button for your value.
4. Show the Topic and Keyword fields.

Discussion 3: Administrative users can also add district banks as **default** values. Default district bank values will automatically pre-populate fields when a new document is created. These values are often meant to act as a template for staff to follow to ensure they include all required information.

LESSON: MEETINGS AND SIGNATURES

Time: 15 minutes

Skip:

- Skip **Discussion 2** in the **Holding Meetings** topic if the district is on the **Standard** edition of SameGoal. This topic covers sharing documents with parents, which is only available with higher editions.
- Skip the **Translation** topic if the district is on the **Standard** or **Plus** edition of SameGoal. Translation is only available with the Pro edition.
- Skip **Demonstration 1** in the **Translation** topic if you did not download the translated document.

TOPIC: VALIDATIONS

Discussion 1: Documents in SameGoal run validation checks, which ensure all required fields are filled out and check for data errors. All required fields are denoted with a red asterisk and any data issues will cause a big red dot to appear. Validation checks are dynamic and update in real-time as you work within a document.

Activity 1: Explore validation checks.

1. On the cover page of your document, enter today's date in the **Start Date** field. When you do this, the red asterisk for the field will disappear.
2. Enter yesterday's date in the **End Date** field. When you do this, there will be a large red dot next to the date field indicating there is an issue with the data entered.
3. Hover over the red dot to see more information. The plan end date cannot be before the start date.
4. Change the year in the end date to be next year (the end date should be 1 year - 1 day after the start date). The issue will be resolved and the red dot will go away.

Discussion 2: As you're finishing a document and getting ready for a meeting, you'll want to make sure you haven't missed anything important. To save time, you can enter into **Validation Mode**, which allows you to quickly go through all remaining unsatisfied validation checks.

Activity 2: Enter into Validation Mode.

1. Click on the check mark icon in the top right to enter into Validation Mode.
2. Use the arrows to the left of the check mark icon to move between errors.
3. Resolve an error (fill out the required item/resolve the data issue), and then move to the next item.
4. Click on the info icon next to the arrows to see a list of all remaining errors.
5. Select an error on the list. You will be brought directly to the associated field.
6. Click the check mark again to exit validation mode.

Discussion 3: Documents cannot be completed until all validation checks pass (except when bypassed by administrative users). If you try to complete a document before all validation checks pass, you will receive a popup warning with the remaining errors and will not be able to complete the document. When all errors have been satisfied, the validation icon in the toolbar will appear as a green check mark. Once this happens, the document may be completed.

TOPIC: HOLDING MEETINGS

Discussion 1: Meetings can be held in-person or remotely. When meetings are in person, many districts present the document in SameGoal on a smartboard or using a projector for the group.

When doing this, it's recommended that you enter into **Meeting Mode**. This minimizes incoming chat messages so no unexpected messages pop up, hides other students on the left, and gives you more screen room by hiding the editing toolbar.

Meeting Mode can also group multiple documents together and can be shared with other users.

Activity 1: Share a meeting and enter into Meeting Mode.

1. While in your document, click on the screen icon in the toolbar and select **Share Meeting Mode**.
2. Give the meeting a name.

3. Enter in the username or email of your partner(s) from before and select them from the list to add them to the meeting.
4. Click **Send notifications & enter meeting mode**.

    Callout: When you do this, a notification will be sent to you and the users who you added to the invite. This notification will act like a link into the Meeting Mode view.

5. You are now in **Meeting Mode**. When you are finished, click on the screen icon again to exit **Meeting Mode**.

Discussion 2: If a meeting is being held remotely, the document can be shared with the parents. When you share a document with a parent, they will receive an email containing a link to the document. Then the parents may follow along in the document during the meeting. While a parent is viewing a document, if a staff member clicks into a field in the document, the parent's screen will automatically scroll to that field, making it easy for the parent to follow along.

Parents see a read-only version of the document and are not able to make edits, except to parent signature-related fields if you grant them **Can View & Sign** permission rather than just **Can View** permission. This allows them to fill out consent fields and add their signature. When a parent makes an edit to a document, the document owner will receive a notification in SameGoal.

TOPIC: SIGNATURES

Discussion 1: Document authors, collaborators, and meeting participants can easily sign documents electronically. Any place where a signature is required, you'll see a little pen icon and when you click the signature field, you'll get a popup that allows you to sign electronically.

Signatures can be drawn on a computer using a mouse or trackpad, or on a smartphone or tablet using a finger.

Activity 1: Electronically sign your document.

1. Navigate to the **Signatures** section of your document.
    - If you need to add an additional section, click the **add button** to do so.

2. Locate a signature field (denoted with a pen icon) and click on it to open the **Adopt and Sign** popup.
3. Type your name into the **Full Name** field.
4. In the **Draw Signature** box, use your finger, mouse, or trackpad to draw your signature.
5. Check the box to certify your signature.
6. Click **Adopt and Sign** to apply your signature to the document.
    - At any time, you can click on an existing signature to remove it or redo it.

Discussion 2: Additionally, rather than writing your signature each time, you can store your signature and "stamp" it into signature fields with one click.

Activity 2: Store your signature.

1. Click on your Account Menu in the top right of your screen and select **Store signature**.
2. Click into the signature field, add your signature, and fill out the rest of the **Store Signature** box.
3. Click on **Store Signature** and then **OK** to save your signature.

    Callout: Now in non-guardian signature fields, you will see a stamp icon and by clicking on the stamp, your stored signature will be applied automatically.

TOPIC: TRANSLATION

Discussion 1: If you’re meeting with parents who do not speak English as their first language, before the meeting takes place, you may request a document translation directly within SameGoal. When a document is translated into another language, its contents will be displayed in both English and the second language.

Activity 1: Request a document translation.

1. In your document, click on the translation icon in the toolbar.

Important: Some districts enable automatic translation approval. If this is enabled for the district, you will see a field for **Translator Email**. In this case, have the attendees provide a personal email (not a fake email).

2. Select a language to request a translation for.
3. Select **Modified fields** as the content to be translated.
4. Click **Request Translation**.
5. Navigate to the Document History panel to check the status of the translation.

Demonstration 1: Show a translated document.

1. Locate the document you downloaded before training.
2. Open the document and scroll through it to show how the document fields and content appear once they are translated.

Discussion 2: If a translator participates in a meeting and the meeting is recorded, the recording may be uploaded as an .mp3 attachment directly to the document.

LESSON: ADDITIONAL TOOLS

Time: 10 minutes

Skip:

- Skip the **Copy from an Existing Document** topic if the district will not allow users to copy from an existing document.

TOPIC: PRINTING A DOCUMENT

Discussion 1: Documents can be previewed in-screen at any point, with or without PDF attachments. From a document preview, you can print (or download the document). Additionally, when a document is printed, it looks the same as when you're editing it. SameGoal's document layout is "what you see is what you get".

Activity 1: Print a document with attachments.

1. While in your document, click on the Printer icon in the top right of the document.
2. In the dropdown, you will have the option to print just the full document, or the document with any PDF attachments.
3. Click **Full Document + PDF Attachments**.
4. In the print preview, scroll down to the bottom to see the attachment appended to the end.
5. Click **Print** to open a print dialog.
6. You may close the print dialog page and click **Exit Preview** to return to the document.

Discussion 2: Before a document is completed, you will be able to see a **DRAFT** watermark across each page when printing or downloading. Displaying a draft watermark on documents until they are marked complete helps districts better communicate to parents and other team members when a given document contains all required information and signatures, especially when meetings are held remotely. This will go away when the document is marked complete.

TOPIC: CLERICAL ERRORS

Discussion 1: If a document needs to be edited to correct a clerical error (i.e. change an incorrect date), it may be marked **Incomplete** by an administrative user. If you need to make a small edit to a document, reach out to an administrative user and ask them to incomplete the document for you. When the document is re-marked incomplete, you can go in and make changes, then complete the document again once you are finished.

TOPIC: COPY FROM AN EXISTING DOCUMENT

Discussion 1: For each student participating in a special program, you'll need to conduct a plan review each year to ensure the student's needs are still being met. With this review, a new plan document will need to be created. To help save you time, you are able to copy from existing, completed documents to create new documents.

Demonstration 1: Create a new document by copying from a completed document.

1. Navigate to your Test002 student's **Documents** tab and locate their completed plan.
2. Select the plan by clicking the checkbox on the left, and go to **Actions** > **Copy to new document**.
3. When you get the popup warning, click **Copy document >>**.

    Callout: When copying from an existing document, you will have the option to share the new document with all of the same collaborators upon creation.

4. Click **Copy document**.
5. Enter into the new document.
6. Scroll through to show that some fields (such as dates and demographics) did not copy over, but many of the other fields did.

Discussion 2: The new document that is created will automatically pull information from the previous document. Exactly which fields will copy over varies by form type, but dates, signatures, and demographics information will **not** pull over. So when it comes time to review a student's plan, you can copy last year's plan and just review and update the information as necessary.

LESSON: WRAP UP

Time: 5 - 30 minutes

TOPIC: SUPPORT

Discussion 1: SameGoal publishes robust online help guides covering a range of topics from general system functionality to specific program documentation workflows. These support guides contain step-by-step instructions on how to complete different tasks in SameGoal as well as videos that demonstrate the workflows.

Users can also contact and receive support from SameGoal's daily helpdesk via phone or email.

Activity 1: Access SameGoal's support resources.

1. Open the support menu by clicking on the question mark icon in the top right of the screen.

   Callout: Notice the helpdesk contact information listed in the support menu. If you call into the helpdesk, you will need to give them a Call-In Code which you can generate by clicking on the **Show Call-In Code** button.

2. Click on **Help** in the support menu. You will be brought to the online guides.
3. Click on **User Guide**. These pages provide information about general application functionality.
4. Navigate back to the online guides landing page.
5. Click on one of the state program support links. These pages offer program guidance for various topics such as participation, deadlines, and common workflows.

TOPIC: QUESTIONS

Discussion 1: If time, allow users to ask any questions they might have.

TOPIC: EXPLORE YOUR ENVIRONMENT

Activity 1: If time, explore your environment and the real data already in it (optional).

- Begin creating bank values for yourself.
- Star any documents that should be on your Caseload.
- Review any PDFs or skeleton documents that have been added. Copy and paste information from PDFs to populate the next IEP.
- Use your test student to play around with different forms/features to familiarize yourself with the program.

AFTER TRAINING

After completing this training, make sure you complete the required Cleanup steps.