

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 in to 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 a Document (10 minutes)		
Search for Students	5 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 Document	5 minutes	<ul style="list-style-type: none"> • Discussion: Create new dropdown • Activity: Make sure you have the correct form permissions • Discussion: RTI tier guidance • Activity: Create a document for your test student • Discussion: When a document is created
Authoring Documents (15 minutes)		

Document Overview	2 minutes	<ul style="list-style-type: none"> • Discussion: Demographics information is automatically populated • Discussion: Moving through a document
Editing a Document	4 minutes	<ul style="list-style-type: none"> • Discussion: Tools for editing a document • Activity: Add text to a document and format it • Activity: Add an additional section
Autosave	2 minutes	<ul style="list-style-type: none"> • Discussion: SameGoal automatically saves changes made to a document • Activity: Explore autosave
Attachments	4 minutes	<ul style="list-style-type: none"> • Discussion: You can upload files and include them as attachments on documents • Activity: Add an attachment
Printing a Document	3 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
Collaboration (15 minutes)		
Sharing a Document	5 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	3 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
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 • Discussion: District and user banks can utilize topics and keywords
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 banks can be added as default values
Meetings and Signatures (15 minutes)		
Validations	4 minutes	<ul style="list-style-type: none"> • 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	4 minutes	<ul style="list-style-type: none"> • Discussion: It's recommended you enter into Meeting Mode for meetings

		<ul style="list-style-type: none"> • Activity: Share a meeting and enter into Meeting Mode • Discussion: Parents can follow along electronically during a meeting • Activity: Share your document with a parent
Signatures	4 minutes	<ul style="list-style-type: none"> • 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	<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
Completing Documents (10 minutes)		
Completing a Document	3 minutes	<ul style="list-style-type: none"> • Discussion: Once all information is entered, a document can be completed • Activity: Complete a document • Discussion: When a document is completed
Clerical Errors	1 minute	<ul style="list-style-type: none"> • Discussion: Documents can be marked incomplete by admin users
Program Participation	3 minutes	<ul style="list-style-type: none"> • Discussion: Student will be enrolled in RTI • 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
Workflow Options (10 minutes)		

New Plan Each Year	2 minutes	<ul style="list-style-type: none"> • Discussion: You can create 1 plan each year
Amended Plan Each Reporting Period	4 minutes	<ul style="list-style-type: none"> • Discussion: Amendments allow you to make formal changes to a document • Activity: Amend the plan • Discussion: When the document is completed again, the deadline will be pushed back
New Plan Each Reporting Period	4 minutes	<ul style="list-style-type: none"> • Discussion: You can create a new plan each reporting period • Discussion: Documents can be created by copying from an existing document • Activity: Create a new plan by copying from an existing plan
Other RTI Documents (10 minutes)		
Progress Report	5 minutes	<ul style="list-style-type: none"> • Discussion: Progress Reports can be used to track progress narratively or with a progress monitoring chart • Activity: Create an RTI Progress Report and chart progress • Discussion: There are a few workflow options for Progress Reports
Follow Up	5 minutes	<ul style="list-style-type: none"> • Discussion: At the end of an RTI Plan, and RTI Follow-Up is used to document next steps • Activity: Create and fill out an RTI Follow Up • Discussion: Deadlines for the next period are determined based on decisions in the Follow-Up
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 •	Activity: If time, explore your environment
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