

## 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"> <li>• <b>Discussion:</b> What is SameGoal?</li> <li>• <b>Discussion:</b> Why the district is moving to SameGoal</li> <li>• <b>Discussion:</b> Overview of training</li> </ul>
Logging In	10 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> How does login work for the district?</li> <li>• <b>Activity:</b> Log into SameGoal</li> </ul>
Screen Overview	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Working with test data</li> <li>• <b>Discussion:</b> Left menu navigation</li> <li>• <b>Activity:</b> Check building permissions</li> </ul>
Creating a Document (10 minutes)		
Search for Students	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Navigating to a student's Documents tab</li> <li>• <b>Activity:</b> Search for your test student</li> <li>• <b>Discussion:</b> Tabs on a student's page</li> </ul>
Create a Document	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Create new dropdown</li> <li>• <b>Activity:</b> Make sure you have the correct form permissions</li> <li>• <b>Discussion:</b> RTI tier guidance</li> <li>• <b>Activity:</b> Create a document for your test student</li> </ul>

		<ul style="list-style-type: none"> <li>• <b>Discussion:</b> When a document is created</li> </ul>
<b>Authoring Documents (15 minutes)</b>		
Document Overview	2 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Demographics information is automatically populated</li> <li>• <b>Discussion:</b> Moving through a document</li> </ul>
Editing a Document	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Tools for editing a document</li> <li>• <b>Activity:</b> Add text to a document and format it</li> <li>• <b>Activity:</b> Add an additional section</li> </ul>
Autosave	2 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> SameGoal automatically saves changes made to a document</li> <li>• <b>Activity:</b> Explore autosave</li> </ul>
Attachments	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> You can upload files and include them as attachments on documents</li> <li>• <b>Activity:</b> Add an attachment</li> </ul>
Printing a Document	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents can be previewed, printed, or downloaded at any point</li> <li>• <b>Activity:</b> Print a document with attachments</li> <li>• <b>Discussion:</b> Documents will have a DRAFT watermark before they are marked complete</li> </ul>
<b>Collaboration (15 minutes)</b>		
Sharing a Document	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents can be shared with other users</li> <li>• <b>Activity:</b> Share a document with another user</li> <li>• <b>Discussion:</b> Permission levels</li> <li>• <b>Discussion:</b> When a document is shared with you</li> </ul>
Collaborative Editing	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Users can work in one document simultaneously</li> <li>• <b>Activity:</b> Work in a document with another collaborator</li> </ul>
Chat	2 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> In-application chat allows staff members to securely message</li> </ul>

		<ul style="list-style-type: none"> <li>• <b>Activity:</b> Send a message using the Chat feature</li> <li>• <b>Discussion:</b> Chat is not attached to a specific document or student</li> </ul>
Document History	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Each document has a Document History panel</li> <li>• <b>Activity:</b> View events in the Document History panel</li> <li>• <b>Discussion:</b> Document History is helpful in several ways</li> </ul>
<b>Bank Values (10 minutes)</b>		
User Banks	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> SameGoal has functionality to store frequently used text, which support name and pronoun substitution</li> <li>• <b>Activity:</b> Create and use a user bank value</li> <li>• <b>Discussion:</b> Saved banks are available in every document of the same form type</li> <li>• <b>Discussion:</b> District and user banks can utilize topics and keywords</li> </ul>
District Banks	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> District banks are made by admin and are available to all users</li> <li>• <b>Discussion:</b> District banks can be added as default values</li> </ul>
<b>Meetings and Signatures (15 minutes)</b>		
Validations	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents run validation checks</li> <li>• <b>Activity:</b> Explore validation checks</li> <li>• <b>Discussion:</b> Validation Mode allows you to quickly go through remaining errors</li> <li>• <b>Activity:</b> Enter into Validation Mode</li> <li>• <b>Discussion:</b> Documents can't be completed until all validation checks pass</li> </ul>
Holding Meetings	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> It's recommended you enter into Meeting Mode for meetings</li> </ul>

		<ul style="list-style-type: none"> <li>• <b>Activity:</b> Share a meeting and enter into Meeting Mode</li> <li>• <b>Discussion:</b> Parents can follow along electronically during a meeting</li> <li>• <b>Activity:</b> Share your document with a parent</li> </ul>
Signatures	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents can be signed electronically</li> <li>• <b>Activity:</b> Electronically sign your document</li> <li>• <b>Discussion:</b> Signatures can be saved to your account to "stamp" into signature fields</li> <li>• <b>Activity:</b> Store your signature</li> </ul>
Translation	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents can be translated directly within SameGoal</li> <li>• <b>Activity:</b> Request a document translation</li> <li>• <b>Demonstration:</b> Show a translated document</li> <li>• <b>Discussion:</b> Meeting recordings can be uploaded as an attachment to the document</li> </ul>
<b>Completing Documents (10 minutes)</b>		
Completing a Document	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Once all information is entered, a document can be completed</li> <li>• <b>Activity:</b> Complete a document</li> <li>• <b>Discussion:</b> When a document is completed</li> </ul>
Clerical Errors	1 minute	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Documents can be marked incomplete by admin users</li> </ul>
Program Participation	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Student will be enrolled in RTI</li> <li>• <b>Activity:</b> View a student's Programs tab</li> </ul>
Deadlines	3 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> See info by hovering over the program badge</li> <li>• <b>Activity:</b> View a student's Deadlines tab</li> <li>• <b>Discussion:</b> Deadlines calendar</li> <li>• <b>Activity:</b> View the Deadlines calendar</li> </ul>
<b>Workflow Options (10 minutes)</b>		

New Plan Each Year	2 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> You can create 1 plan each year</li> </ul>
Amended Plan Each Reporting Period	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Amendments allow you to make formal changes to a document</li> <li>• <b>Activity:</b> Amend the plan</li> <li>• <b>Discussion:</b> When the document is completed again, the deadline will be pushed back</li> </ul>
New Plan Each Reporting Period	4 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> You can create a new plan each reporting period</li> <li>• <b>Discussion:</b> Documents can be created by copying from an existing document</li> <li>• <b>Activity:</b> Create a new plan by copying from an existing plan</li> </ul>
<b>Other RTI Documents (10 minutes)</b>		
Progress Report	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Progress Reports can be used to track progress narratively or with a progress monitoring chart</li> <li>• <b>Activity:</b> Create an RTI Progress Report and chart progress</li> <li>• <b>Discussion:</b> There are a few workflow options for Progress Reports</li> </ul>
Follow Up	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> At the end of an RTI Plan, and RTI Follow-Up is used to document next steps</li> <li>• <b>Activity:</b> Create and fill out an RTI Follow Up</li> <li>• <b>Discussion:</b> Deadlines for the next period are determined based on decisions in the Follow-Up</li> </ul>
<b>Wrap Up (5-30 minutes)</b>		
Support	5 minutes	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> SameGoal has many online support resources</li> <li>• <b>Activity:</b> Access SameGoal's support resources</li> </ul>
Questions	Varies	<ul style="list-style-type: none"> <li>• <b>Discussion:</b> Ask questions</li> </ul>

Explore Your Environment	Varies	<ul style="list-style-type: none"><li>• <b>Activity:</b> If time, explore your environment</li></ul>
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