RTI Training Outline

Before using this outline 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 A DOCUMENT

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 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: The basic RTI/MTSS workflow is Plan, Progress Report, Follow-Up. There are two sets of RTI/MTSS forms in SameGoal; one for Tier 2 and one for Tier 3. The Tier 2 and Tier 3 documents are very similar but are kept separate to help track a student's movement between tiers.

A student may have multiple sets of RTI documents open simultaneously if they are in different tiers in different subjects/areas. In this case, they would have Tier 2 documents and Tier 3 documents. However, only one set of documents is needed per tier.

Let's start by creating a **Tier 2 RTI Plan**.

Activity 2: Create a document 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 an **RTI Tier 2 Plan** 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**.

LESSON: AUTHORING DOCUMENTS

Time: 15 minutes

TOPIC: DOCUMENT OVERVIEW

Discussion 1: When a new document is first created, demographics information on the cover page is automatically 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 **Update Student Info** at the top of the document to re-pull the data.

Discussion 2: There are a couple of ways to move throughout a document. You can scroll through or you can click on the section tabs to be brought directly to the section. Hovering over a Section number will display the section title.

TOPIC: EDITING A DOCUMENT

Discussion 1: Once you create a document, you'll want to begin working on it. When editing documents, SameGoal has many tools to help you. Authoring is very simple and works similarly to any other word processing application.

Rich Text Editing: 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.

Copy and Paste: You can copy and paste items directly into a document. If you paste images or tables, the original formatting will be preserved, and tables that have been pasted in will continue to be editable.

Add and Remove Sections: Some additional sections can be added using the **add** buttons. You can also remove these sections if you don't need them using the **X** in the top right corner.

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

1. In your document, click into the **Student weaknesses/problem identification** 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.

Activity 2: Add an additional section.

1. In your document, scroll down to the Interventions section.
2. Click on the **add Interventions** button.
    - A new section should have been added.
3. Click on the **add** button again to add another section.

    Callout: The **Number** field in the Intervention should be used to number each intervention that's added.

4. Click on the **X** in the top right corner to remove one of the sections.
5. When you get a popup warning asking if you want to delete the section, select **OK**. You should be left with one Intervention section.

TOPIC: AUTOSAVE

Discussion 1: Once you start working in a document, you probably want to make sure that your work is saved, but you might have noticed that there is no save button. 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. Click into the **Target area of concern** text field in the Interventions section.
2. Begin typing and 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 again in the **Current performance level** field.

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.

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.

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: SHARING A DOCUMENT

Discussion 1: Once you've created a document and added some of your own contributions to it, the next thing you'll want to do is add additional collaborators to it so they may also 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. Once in the Share tab, there will be two sides: **Collaborative Team** and **Add Collaborator**.
   - The Collaborative Team lists all of the current collaborators for a document and what their permissions are.
   - The Add Collaborator side allows you to share the document with others to add them to the Collaborative Team.
3. On the Add Collaborator side, search for your partner or partners by entering their name in the **First** and **Last** fields, or by entering their username or email in the **Emails** field.
4. After clicking **Search**, locate your partner's name in the results list and click on their name to add them to the Collaborative Team on the left.
5. If you have two partners, repeat the process to share the document with your other partner.
6. 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 **Recents** tab.
- You will receive a **Document Share Event** notification to the bell icon in the top right of your screen.

Callout: You can try finding the student on your My Students list and locating the document on your Caseload and Recent page.

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.

Callout: You may return to your own documents now.

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 the **Intervention goal statement** field and click into it.
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] will score at least 80% on his skills assessments."
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 Tier 2 RTI Plan, you would be able to use this stored value in the same field.

Discussion 3: When creating user banks, you 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.

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: 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** and **Activity 2** in the **Holding Meetings** topic if the district is on the **Standard** edition of SameGoal. These cover 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 end date to be in the future (~6-9 weeks out). 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.

Activity 2: Share your document with a parent.

1. Navigate to the **Share** tab in your document.
2. Click on **Share with Parent/Guardian**.
3. Provide a fake first and last name.
4. 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).

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

   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.

5. Optionally, change the permission.
6. Optionally, include a note.
7. Hit **Send**.

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.
2. Click **add Signatures** to add a Signatures section.
3. Click **add Team Member** to add a new signature line.
4. Locate a signature field (denoted with a pen icon) and click on it to open the **Adopt and Sign** popup.
5. Type your name into the **Full Name** field.
6. In the **Draw Signature box**, use your finger, mouse, or trackpad to draw your signature.
7. Check the box to certify your signature.
8. 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.

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: COMPLETING DOCUMENTS

Time: 10 minutes

Skip:

- Skip **Discussion 2** and **Activity 2** in the **Deadlines** topic if the district is on the **Standard** edition of SameGoal. These cover the Deadlines Calendar which is only available with higher editions.

TOPIC: COMPLETING A DOCUMENT

Discussion 1: Once all information has been entered into a document and all necessary meetings have been completed, the document should be marked complete in the program.

Activity 1: Complete a document.

1. Quickly fill out the remainder of the required fields. You don't need to fill the document out properly at this time. We just want to fill out the required fields so we can mark it complete.

   Callout: Validation Mode to fill out the remaining fields if it's helpful.

2. Depending on which fields you filled out during the validation activity before, some of the remaining fields might include:
   - Meeting Date on the Cover page
   - Student strengths
   - The remaining fields in the Intervention section
   - Meeting Date in the Signatures section
3. Once you have the green validation check mark, click the lock icon in the toolbar.
4. Select **Complete**.

Discussion 2: When a document is completed:

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

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: PROGRAM PARTICIPATION

Discussion 1: When a Plan is completed, the student will be enrolled in RTI. In order to see more information about program participation, you can view the participation timeline on the student's **Programs** tab. This page displays participation information for all programs.

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. The timeline has an entry noting that the student is now participating in RTI.

TOPIC: DEADLINES

Discussion 1: By hovering over the student's badge, you can see program enrollment information as well as an overview of upcoming deadlines. When a Plan is completed, a

Follow Up will be due 15 school days after the Plan end date.

You can also see more deadline information on a student's **Deadlines** tab. This page lists all past due and upcoming deadlines for each special program. Deadlines are assigned to whoever was listed as the owner of the document that the deadline was determined from. You're able to click on deadlines on this page to show more details.

Activity 1: View a student's Deadlines tab.

1. Navigate to the student's **Deadlines** tab.
2. Click on a deadline to display more information about it.
3. Notice that the timeline shows specific fields in the previous document that helped calculate the deadline.
4. Click on one of the fields to be directed to the field in the document automatically.

Discussion 2: The **Deadlines** page in the left menu will show you a calendar of all deadlines that have been assigned to you. You can switch the calendar to a month view, week view, day view, or to a list view.

Activity 2: View the Deadlines calendar.

1. Click on the **Deadlines** page in the left menu.
2. Change to the **Month** view.
3. Find the new deadlines and click on one to view more information about it.

LESSON: WORKFLOW OPTIONS

Time: 10 minutes

Skip:

- Skip **Discussion 2** and **Activity 1** of the **New Plan Each Reporting Period** topic if the district will not allow users to copy from an existing document.

TOPIC: NEW PLAN EACH YEAR

Discussion 1: There are a few different workflow options for completing RTI documentation. The first option is to create one plan for the year and create a new plan each year. With this strategy, the plan start date would be at the beginning of the year, the plan end date would be at the end of the year, and a follow-up would be completed once the plan ends.

TOPIC: AMENDED PLAN EACH REPORTING PERIOD

Discussion 1: Another option is to amend the plan each reporting period. Amendments are how you can make formal changes to a document, and you don't need to have administrative permissions to amend a document. Any document owner can create a formal amendment.

By frequently updating the plan, you can adjust interventions as needed to ensure the student's needs continue to be met. With this strategy, the plan end date should be set 6-9 weeks after the plan start date, then when the plan ends, rather than creating a follow-up, the plan should be amended and the end date can be pushed back another 6-9 weeks. This will push the follow-up deadline back as well.

Activity 1: Amend the plan.

1. Navigate to your student's completed **Tier 2 RTI Plan**. You can find it on your Caseload, the Recent page, or your student's Documents tab. Click on the lock icon

in the top right.

2. Select **Amend**.
3. Click **OK** to confirm.
4. On the cover page, click **add Amendment**.
5. Fill out the amendment table.
6. Provide a New End Date that is 6-9 weeks after the original end date.

> **Callout:** For training purposes, we will not be editing the content of the document, but in practice you will update the document as relevant before marking the document complete again, including adding a new signatures section if there was a meeting to discuss what changes were needed.

7. When you are finished, click the lock icon in the top right and select **Complete**.
8. Navigate to the Document History panel to see the amendment event that's been added.
9. Close the Document History panel when you are finished.

Discussion 2: When the document is marked complete again, the deadline will be recalculated to be 15 school days after the new end date. However, you will need to complete at least one follow-up and a new plan each year. You will not be able to set a new plan end date as more than a year after the plan start date.

TOPIC: NEW PLAN EACH REPORTING PERIOD

Discussion 1: The last option is to create a new plan for each reporting period. With this strategy, the plan end date should be set 6-9 weeks after the start date a new follow-up will need to be completed at the end of each reporting period as well.

Discussion 2: If you choose to create a new plan each reporting period, you can creating a plan by copying from the previous plan to save you time. When you create a document by copying from an existing document, information from the previous document will pull forward into the new document. Then all you need to do is review the existing information and make any necessary updates.

Activity 1: Create a new plan by copying from an existing plan.

1. While in your student's completed **Tier 2 RTI Plan**, click on the lock icon in the top right.
2. Select **Copy to new document**.
3. Click **Copy document >>** to confirm.

> **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. Once the new document is created, scroll through and notice which fields copied over and which fields didn't.

LESSON: OTHER RTI DOCUMENTS

Time: 10 minutes

TOPIC: PROGRESS REPORT

Discussion 1: After a plan is completed, it can be helpful to track a student's progress during the duration of the plan. Progress Reports pull interventions directly from the most recent, completed plan document. In these progress reports, you can track progress narratively or with a progress monitoring chart. These charts provide a visual representation of the student's progress over time and can be very helpful, especially when working with parents.

If you are tracking Tier 2 interventions, you should create a Tier 2 Progress Report. If you are tracking Tier 3 interventions, you should create a Tier 3 Progress Report.

Activity 1: Create an RTI Progress Report and chart progress.

1. Navigate to your student's **Documents** tab.
2. Use the **Create new** dropdown to create a **Tier 2 RTI Progress Report**.
3. In the Progress section, click **add Chart** to create a progress monitoring chart.
4. Provide baseline/target dates as well as baseline/target scores. A target trendline will appear.
5. Click the **add Data** button twice.
6. Enter in dates and scores in the *Data* fields. A new trendline will appear between the two data points.

Discussion 2: Similarly to the RTI Plan, there are a few different workflow options for RTI Progress Reports. You can have one Progress Report left open for the entire year, you can complete/amend the Progress Report each reporting period, or you could create a new Progress Report each reporting period.

TOPIC: FOLLOW UP

Discussion 1: At the end of an RTI Plan, an **RTI Follow-Up** is used to document next steps for each intervention and data from the progress report can help drive decisions. At least one follow-up needs to be completed each year that a student participates in RTI.

When conducting a follow-up, the intervention team should meet to review the student's progress and make a determination about next steps.

Activity 1: Create and fill out an RTI Follow Up.

1. Navigate to your student's **Documents** tab and create a **Tier 2 Follow Up**.
2. The **Plan End Date** should be whatever the most recent end date is in the plan.
3. In the Progress section, select one of the progress options.
    - Under target progression line
    - Mostly aligned with target progression line
    - Above target progression line
4. Select a **Next step** based on the progress option you selected above.
    - Return to Tier 1
    - Continue Tier 2
    - Move to Tier 3
5. In the Follow-Up Discussions/Decisions section, you should only check the **Child no longer requires any interventions** button if the next step decision is **Return to Tier 1**. Otherwise leave this box unchecked.

    Callout: If you are tracking multiple interventions for a student, this should only be checked if all interventions are returning to Tier 1.

Discussion 2: RTI Plan deadlines for the next period are determined based on decisions made in the Follow-Up document. If it is decided that the student needs Tier 2 interventions, there will be a deadline for a Tier 2 Plan. If it is decided that the student needs Tier 3 interventions, there will be a deadline for a Tier 3 Plan. If the student does not need any Tier 2 or Tier 3 interventions, they will exit the program.

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.