Bulk Load WEP Goals

The **KPD: Written Education Plan (rev 10/2025)** can be used to populate the WEP with goals, however it is limited to only one goal per area of giftedness. In order to add more than one goal per area, there is an **Other: WEP Goals** data loader than can be used, as well as a **WEP Goals** report.

- Use the WEP Goals Template CSV
- Use the WEP Goals Report
- Bulk Load WEPs

Use the WEP Goals Template CSV

If you would like to download a template CSV and manually populate it to be bulk loaded, follow these steps.

Steps *To download a blank template to bulk load goals:*

1. Log in to SameGoal as an administrative user and navigate to **Settings** > **Data Loader**.
2. Select **Other: WEP Goals** as the import type.
3. Click to download the **Template**.
4. Open the template CSV in a spreadsheet (e.g. Excel or Google Sheets).
   - If you are working in Excel, the CSV can be opened directly in Excel.
   - If you are working in Google Sheets, the CSV can be imported into Sheets by going to **File** > **Import**.
5. In the spreadsheet, provide all relevant information. The **Student ID** and **WEP Date** columns are required and must be filled out for each student who needs a new WEP. In order to update an existing WEP, the **Student ID** and **WEP Date** must match an existing WEP.
   - Information about allowable values and required formatting for each column can be found by going to **Settings** > **Data Loader** and selecting **Other: WEP Goals** as the import type. Details will be included under **Fields**. If you do not

use the specified allowable values and required formatting, the import may fail. If there are no specified values or required formatting, the field is free text entry.

- Do not change the column titles. The file is already in the correct format to be loaded with the data loader.
- **It is important to include all goals you want listed in the WEP, because any goals currently in the WEP will be removed and replaced by the goals included in the CSV.**

6. Once you have populated the spreadsheet with relevant information, save the file as a CSV.

- You can download the spreadsheet as a CSV in Google Sheets by going to **File** > **Download** > **Comma Separate Values (.csv)**.

Use the WEP Goals Report

The **WEP Goals** report pulls all of a student's goals from their previous WEPs. If you would like to run a report to generate a partially filled out CSV to be bulk loaded, follow these steps.

Steps *To use the WEP goals report to bulk load goals:*

1. Navigate to **Reports** > **Advanced Learners** > **WEP Goals**.
2. Run the report to pull identification dates from existing WEPs.
3. Download the report results and open them in a spreadsheet (e.g. Excel or Google Sheets).
   - If you are working in Excel, the results can be downloaded as an XLSX or CSV and opened directly in Excel.
   - If you are working in Google Sheets, the results can be downloaded as an XLSX or CSV and imported into Sheets by going to **File** > **Import**.
4. In the spreadsheet, update WEP information for each relevant student. The **Student ID** and **WEP Date** columns are required and must be filled out for each student who needs a new WEP. In order to update an existing WEP, the **Student ID** and **WEP Date** must match an existing WEP. Students who do not need updated goals can be deleted from the spreadsheet. Each new goal can be included on a new line.
   - Information about allowable values and required formatting for each column can be found by going to **Settings** > **Data Loader** and selecting **Other: WEP Goals** as the import type. Details will be included under **Fields**. If you do not use the specified allowable values and required formatting, the import may fail. If there are no specified values or required formatting, the field is free text entry.
   - Do not change the column titles. The file is already in the correct format to be loaded with the data loader.
   - **It is important to include all goals you want listed in the WEP, because any goals currently in the WEP will be removed and replaced by the goals included in the CSV.**
5. Once you have populated the spreadsheet with relevant information, save the file as a CSV.
   - You can download the spreadsheet as a CSV in Google Sheets by going to **File** > **Download** > **Comma Separate Values (.csv)**.

💡 Tip If a student has more than one WEP, goals from each will all be included in the report. When prepping the CSV for the data load, you can delete older goals and just update goals that are still relevant and add new goals as needed.

Bulk Load Goals

Steps *To bulk load goals:*

1. Once a CSV has been prepped, log in to SameGoal as an administrative user and navigate to **Settings** > **Data Loader**.
2. Select **Other: WEP Goals** as the import type.
3. Click **Choose File** and upload the CSV file you prepped from your device.
4. Before starting the import, click the blue **Preview** button. If there are any errors that will cause the import to fail or warnings that will cause specific lines in the import to fail, you will see an **Errors** or **Warnings** table.
5. Update and fix any issues as necessary. If there are no errors or warnings, you will only see an **Info** table with a summary of the changes to be made.
    - You may need to make updates to the file, save your changes, and re-upload the updated file on the **Data Loader** page.
6. If you have previously manually added goals to any of the WEPs, select **Overwrite manual data**.
7. Click **Start Import**.

Once the **Other: WEP Goals** import has run:

- An **Info** table will be displayed on the **Data Loader** page summarizing the results of the import and listing if there were any errors or warnings.
- Existing WEPs will be updated to include goals listed in the CSV. The data loader determines which WEP should be updated based on the student ID and WEP date listed in the CSV.
- **If any goals were previously documented in the WEP but were not included in the CSV that was loaded, those goals will be removed.**

💡 Tip The **Other: WEP Goals** loader can update WEPs whether they are currently complete or incomplete. The document status does not matter.