

## Bulk Load WEPs

Data loaders are an admin-only tool that allow districts to bulk create/update documents. The **KPD: Written Education Plan (rev 10/2025)** data loader can be used specifically to bulk create, populate, and complete WEPs.

Administrative users can download a template CSV to manually populate and load into the system. Otherwise, in order to save time creating annual WEPs, they can download the results of the **Written Education Plan Bulk Creation** report to generate a CSV that is already partially filled out. Once a CSV has been prepped, it can be loaded into SameGoal to bulk load WEPs.

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- Bulk Load WEPs

### Use the WEP 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 WEPs:*

1. Log in to SameGoal as an administrative user and navigate to **Settings > Data Loader**.
2. Select **KPD: Written Education Plan (rev 10/2025)** 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.

- Information about allowable values and required formatting for each column can be found by going to **Settings > Data Loader** and selecting **KPD: Written Education Plan (rev 10/2025)** 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.

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 Report

The **Written Education Plan Bulk Creation** report pulls identification dates from a student's most recent Gifted Profile. 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 report to bulk load WEPs:*

1. Navigate to **Reports > Advanced Learners > Written Education Plan Bulk Creation**.
2. Run the report to pull identification dates from existing Gifted Profiles.
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. Students who do not need a new WEP can be deleted from the spreadsheet.
  - Information about allowable values and required formatting for each column can be found by going to **Settings > Data Loader** and selecting **KPD: Written Education Plan (rev 10/2025)** 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.
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)**.

**Q Tip** The **Written Education Plan Bulk Creation** report can pull from the Gifted Profile that was revised 01/2026 as well as the previous version of the Gifted Profile.

## Bulk Load WEPs

### Steps *To bulk load WEPs*

1. Once a CSV has been prepped, log in to SameGoal as an administrative user and navigate to **Settings > Data Loader**.
2. Select **KPD: Written Education Plan (rev 10/2025)** 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.
  - o You may need to make updates to the file, save your changes, and re-upload the updated file on the **Data Loader** page.
6. Click **Start Import**.

Once the **KPD: Written Education Plan (rev 10/2025)** 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.
- A new **Written Education Plan (rev 10/2025)** document will be created for each student included in the CSV (unless there were any errors), the document will be populated with information from the CSV, and the document will be marked complete.
- Deadline and program participation information will be updated accordingly, but it can take up to a couple hours to see these changes.

**Q Tip** 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.

**Q Tip** If you would like to add signatures to the document, an administrative user can bulk incomplete the documents. In order to do so, navigate to the **All** page and filter by **Form** and **Date** as helpful.

**Q Tip** If your district is on the PRO edition of SameGoal, staff members can then stamp their signatures into the documents as needed before they are re-marked complete.

