samegoal

# Emergent Bilingual Training Script

Before using this outline to train users, make sure you've read through the Training Manual and completed the required preparation.

## TABLE OF CONTENTS

- Printing

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.

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**Discussion 2:** Discuss the reasons why the district decided to switch to SameGoal as well as which problems SameGoal will help to solve.

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**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.).

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**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.

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**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.

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**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 DOCUMENTS

**Time:** 15 minutes

**Preparation:** Assign everyone in training a number associated with a test student. Students are available starting with Test007.

## 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**.

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**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.

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**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.

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**Discussion 2:** A Home Language Survey (HLS) is completed for all students upon school enrollment. If a student is a potential English learner, this document can be completed in SameGoal. If the district allows, a Home Language Survey can also be created in SameGoal automatically upon district enrollment.

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**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 a **Home Language Survey** 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**.

## TOPIC: BULK CREATE DOCUMENTS

**Discussion 1:** Creating a single document for a student from their **Documents** tab is one way to create a document, but in order to save time, you can also create documents in bulk.

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**Demonstration 1:** Bulk create Home Language Surveys.

1. Navigate to the **Students / create new** page.
2. Use the **Student IDs** filter and enter in (or copy and paste) the following list of test student IDs:
   - TS999002, TS999003, TS999004
3. Use the checkbox in the top left to select all students.
4. Click on the **Actions** dropdown and select **Create Document**.
5. Search for the **Home Language Survey**.
6. Click **Create 3 Documents**.

   **Callout:** Once you click **Create**, you will get a summary at the top of the screen informing you how many documents were created and if there were any errors. Some common errors when bulk creating documents are:

   - The student already has an incomplete document of the selected type.
   - You do not have permission to create the selected document in the selected student's building.

7. Click on one of the student's names to be brought to their **Documents** tab and show that the student now has a Home Language Survey created.

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**Important:** Navigate back to your HLS for Test001.

## TOPIC: AUTHORING DOCUMENTS

**Discussion 1:** SameGoal has tools to help you edit documents. 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.

**Autosave:** 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.

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**Activity 1:** Explore autosave.

1. In Part 1, click into the **Enrolled** field.
2. Begin typing yesterday's date (in MM/DD/YYYY format) 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**.

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**Discussion 2:** Attachments can be added to any form in SameGoal, and several different file types are supported. If the Home Language Survey was originally completed outside of SameGoal and you would like to include the original with this document, you can add it as an attachment.

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**Activity 2:** 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.

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 the **Form** tab.

## LESSON: COMPLETING DOCUMENTS

**Time:** 15 minutes

**Skip:**

- Skip **Discussion 2** and **Activity 2** in the **Deadlines** topic if the district is on the **Standard** edition of SameGoal. This discussion covers the Deadlines calendar which is only available with higher editions.

## TOPIC: COMPLETE A DOCUMENT

**Discussion 1:** Documents cannot be completed until all required fields are filled out and there are no data errors with the document (except when bypassed by administrative users).

We will learn more about validation checks later, but for now, we will quickly fill out the rest of the required fields (indicated by a red asterisk) in the document so we can mark it complete.

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**Activity 1:** Complete a document.

1. In Part 2, answer questions 1, 2, and 3 with a language other than English.

   **Callout:** If a student has language information saved on their **Details** tab, it will auto-populate into the HLS.

2. Click the lock icon in the toolbar.
3. Select **Complete**.

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**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.

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**Discussion 3:** If a completed document needs to be edited to correct a clerical error, 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 the Home Language Survey is completed, your student will automatically be pre-enrolled in the Emergent Bilingual program and a gray badge will appear next to their name because it was indicated that they speak a language other than English. In order to see more information about program participation, you can view the participation timeline on the student's **Programs** tab.

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**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.
3. Notice that the timeline has an entry noting that the student is now under eligibility review for Emergent Bilingual.

## 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. An LPAC Initial Review will be required for potential English Learners.

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.

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**Activity 1:** View a student's Deadlines tab.

1. Navigate to the student's **Deadlines** tab.
2. Click on the 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.

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**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.

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**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 deadline (should be 4 weeks from yesterday) and click on on to view more information about it. You may need to use the arrows in the top left to be brought to next month.

## TOPIC: LPAC INITIAL REVIEW

**Discussion 1:** Potential English learners need to take a language proficiency assessment to determine if they are emergent bilingual or English proficient. The results of this assessment can be documented in an **LPAC Initial Review**. Completing this document will satisfy the current deadline.

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**Activity 1:** Create an LPAC Initial Review.

1. Navigate back to your test student's **Documents** tab by clicking on their name in your **My Students** list.
2. Click into the **Create new** dropdown at the top.
3. Create an **LPAC Initial Review**.

   **Callout:** This document can automatically pull in information from a completed Home Language Survey document.

4. Click on the **Copy/Insert from HLS** button at the top left of the document.

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**Discussion 2:** Again, you may choose to bulk create these documents. Since these students now have a deadline for an Initial LPAC, you can search for students by their deadlines in order to bulk create the documents.

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**Demonstration 1:** Use deadlines to bulk create documents.

1. Navigate to the **Students / create new** page.
2. Select the **Caseload** filter.
3. Use the **deadlines** filter and select the **LPAC Initial Review** deadline.
4. Click **Search**.
5. Select all listed students.
6. Click on the **Actions** dropdown and select **Create Document**.
7. Search for **LPAC Initial Review**.
8. Click **Create 3 Documents**.

> **Callout:** Because I already created an **LPAC Initial Review** for Test001, I got a messaging saying one document was not created because the student already has an incomplete document of the given form type. But documents were created for the other two students.

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**Important:** Navigate to your LPAC Initial for Test001.

## LESSON: HOLDING MEETINGS

**Time:** 10 minutes

## TOPIC: MEETING MODE

**Discussion 1:** Meetings can be held in-person or remotely. When holding meetings, it’s recommended that you enter into **Meeting Mode**, which will:

- Minimize incoming chat messages
- Hide the left menu (thus hiding other student information)
- Expand the screen

While in **Meeting Mode**, unlocked documents will still be editable, and all document authoring tools will still be available.

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**Activity 1:** Enter Meeting Mode.

1. While in your student's document, click on the screen icon in the top right.
2. Select **Present**.
3. You are now in **Meeting Mode**.
4. You can click on the screen icon again to exit **Meeting Mode**.

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**Discussion 2:** Meeting Mode can also be used to group multiple documents together. This can be useful if you are reviewing several documents in a single meeting, such as during an LPAC Initial Review.

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**Demonstration 1:** Use Meeting Mode to group multiple documents.

1. Navigate to your **Caseload** tab.
2. Select the **LPAC Initial Reviews** for Test001, Test005, and Test006.
3. Click on the screen icon in the top right.
4. Select **Present**.

5. Use the arrows in the top right to navigate between documents.

## TOPIC: IDENTIFICATION AND PLACEMENT

**Discussion 1:** At the end of each LPAC Initial Review, the LPAC Committee will need to make an Identification Decision and Placement Recommendation based on the student's performance and assessment results. These decisions will then drive program participation and deadlines for the student once the document is marked complete.

- If the student is Emergent Bilingual, they can enter the Bilingual Education Program with transitional bilingual services or dual language immersion, or they can enter one of the English as a second language programs. This will fully enroll the student in the Emergent Bilingual program.
- If the student is English proficient, they will not need a placement recommendation. When the document is completed, English proficient students will be unenrolled from the program.
- However, if the student is English proficient and is electing to participate in a language program, you can select **English Proficient (non-EB electing into language program)**, and one of the dual language immersion placement options. In this case, the student will be unenrolled from Emergent Bilingual and enrolled in the elective Dual Language program instead.

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**Demonstration 1:** Make placement decisions.

1. While still in **Meeting Mode**, use the arrows in the top right to navigate between documents and make a placement recommendation.
2. In the document for Test005, select **English Proficient** as the Identification Decision.
3. In the document for Test006, select **English Proficient (non-EB electing into language program)** as the Identification Decision and one of the **Dual language immersion** options for the Placement Recommendation.

## 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.

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**Activity 1:** Explore validation checks.

1. In the **Decision** section of your document, under **Identification Decision**, select **Emergent Bilingual**. When you do this, there will be a large red dot in the **Placement Recommendation** box.

   **Important:** As the trainer, do this in the document for Test001.

2. Hover over the red dot to see more information. A placement recommendation is required when the student is emergent bilingual.
3. Select **Enter/Continue ESL Program**. A new dot will appear.
4. Select a specific ESL Program for the student.

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**Discussion 2:** Documents cannot be completed until all validation checks pass (except when bypassed by administrative users). In order to quickly go through all remaining, unsatisfied validation checks, you can enter into **Validation Mode**.

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**Activity 2:** Fill out any remaining required fields using Validation Mode and mark your document complete.

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.

   **Callout:** Again, use yesterday's date as the **LPAC date**.

4. Once all errors have been satisfied and all required fields have been filled out, you will get a green check mark.

   **Important:** As the trainer, fill out all three of your test documents. When filling out the documents, it might be helpful to pull in information from the Home Language Surveys to help fill out required fields faster. Be sure to set the **LPAC Date** as yesterday's date for each student.

5. Optionally, fill out some of the **Language Assessment Results** fields. They are not required, but information can pull through to an **LPAC Annual Review** document.
6. Once you are done filling out your document, click on the lock icon in the top right corner.
7. Select **Complete**.

**Discussion 3:** When you complete the document, the student will be fully enrolled in the Emergent Bilingual Program and a new deadline will be set for a Parental Notification of Initial Identification and Approval of Placement - ESL.

**Demonstration 1:** Review placement decisions, deadlines, and program participation for the three test students.

1. Make sure you've completed all three of your **LPAC Initial Review** documents.
2. Review each student's deadline and enrollment information.
3. Compare that to the placement decisions.

## LESSON: PARENT COMMUNICATION

**Time:** 10 minutes

**Skip:**

- 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 the **Share With Parents** topic if the district is on the **Standard** edition. This covers electronically sharing documents with parents, which is only available with higher editions.

### TOPIC: STANDARD LETTERS

**Discussion 1:** After every LPAC Review, if a student enters or continues an English learner program, a Parental Notification document will need to be sent to the parents to notify them of the placement and to obtain their consent. They will need to fill out and sign the document.

There are several Parental Notification documents, depending on whether this is an initial identification or a notification on progress, and depending on which specific program the student is enrolled in.

These notifications are referred to as **Standard Letters** and they are maintained by the TEA. The TEA also maintains official, translated versions of all the letters.

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**Activity 1:** Create a Parental Notification document.

1. Navigate back to your student's **Documents** tab.

   **Important:** As the trainer, continue using Test001.

2. Search for **Parental Notification of Initial Identification and Approval of Placement - ESL**. There are several versions of the letter, so be sure you're creating the correct one (ESL).
3. Click **Create**.

**Callout:** Assessment information from the LPAC Review will automatically pull into the Notification if you filled them out.

## TOPIC: TRANSLATION

**Discussion 1:** If you're sharing documents with parents whose preferred language is not English, before sharing the document with them, you can request a document translation from directly within SameGoal.

Additionally, SameGoal has saved translations for the standard letters that you can display without going through a request process.

When a document is translated into another language, its contents will be displayed in both English and the second language.

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**Activity 1:** Display a document translation.

1. In your document, click on the translation icon in the toolbar.
2. For Language, select **Spanish**.
3. Click **Display Form Translation**.
4. Scroll through the document and notice the translated content.

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**Discussion 2:** In order to translate documents that are not standard letters, you would need to go through a full translation request process. In the **Request Translation** popup, instead of displaying the translation immediately, you would send a request to a translator. Once the translator finalizes the request, the document will appear in both English and the translated language.

## TOPIC: SHARE WITH PARENTS

**Discussion 1:** Documents can be shared with parents electronically. When you share a document with a parent, they will receive an email containing a link to the document.

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.

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**Activity 1:** Share your document with a parent.

1. Navigate to the **Share** tab in your document.
2. Click on **Add Parent/Guardian**.
3. For Guardian, click the **Select** dropdown and choose **Enter manually**.

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

4. Provide a fake first and last name.
5. 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).

> **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.

6. Optionally, change the permission.
7. Optionally, include a note.
8. Hit **Send**.
9. Hit **OK** if you get a popup warning. The parent should be added to the Collaborative Team.
10. Hit **OK** again to close the **Update Collaborators** window.

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**Discussion 2:** After the document is passed along to the parents and they fill out the consent questions, the document owner will receive a notification informing them the parent edited the document. Then a district staff member can fill out the **Date received by campus** field and the document can be marked complete.

If the parent grants their consent, a deadline will be set to complete an LPAC Annual Review by the end of the year. If they do not grant their consent, they will need to sign an additional Denial document to confirm their decision, however the student will not be unenrolled from the program. The district will still have a responsibility to provide reasonable accommodations to the student, but the student will not receive any specific Emergent Bilingual supports.

TOPIC: PRINTING

**Discussion 1:** Rather than sharing documents with parents electronically, you can also print the document and give them a hard copy. 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".

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**Activity 1:** View a print preview.

1. While in your document, click on the Printer icon in the top right of the document.
2. Select **Full Document**.
3. Scroll through the document.
4. From this page, you can choose to print or download the document.
5. Click **Exit Preview** to return to the document.

## LESSON: COLLABORATION

**Time:** 20 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.

**Skip:**

- Skip **Discussion 2** and **Activity 2** of the **Signatures** topic if the district is on the **Standard** or **Plus** edition of SameGoal. These cover Stored Signatures, which are only available with the **Pro** edition of SameGoal. Additionally, skip these sections if the district will not be enabling Stored Signatures.

## TOPIC: LPAC ANNUAL REVIEW

**Discussion 1:** At the end of the school year, if a student is emergent bilingual, the school will need to review their progress to determine if they are still an English learner or if they are considered to be English proficient.

This decision can be documented in an LPAC Annual Review. If test scores have been loaded from TIDE, they will automatically populate this document.

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**Discussion 2:** Similarly to the Initial Review, a placement decision will need to be documented in the **Decision** section, but now the team will need to determine if the student should continue in their current program, enter a different program, or exit and reclassify as English proficient.

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**Activity 1:** Create an LPAC Annual Review.

1. Navigate to your test student's **Documents** tab.
2. Use the dropdown to create a new **LPAC Annual Review**.

**Callout:** TELPAS information has prepopulated for this student.

## TOPIC: SHARE DOCUMENTS

**Discussion 1:** In SameGoal you can share documents with other users so you may all collaborate on a single document. In order for all meeting participants to sign a document, you can share the document with other team members.

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**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. On the Add User side, search for your partner or partners by username or email.
3. Locate your partner's name in the results list and click on their name to add them to the Collaborative Team.
4. If you have two partners, repeat the process to share the document with your other partner.
5. 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.

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**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 **Recent** tab.
- You will receive a notification (unless you manually disable notifications).

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**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.

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**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 **Recent** tab or in your **Notifications** and clicking on it.
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.

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**Callout:** You may return to your own documents now.

TOPIC: BANK VALUES

**Discussion 1:** When you meet for an LPAC Review, before completing the document, you should document any meeting notes. In order to save time, it can be helpful to utilize **User Banks**.

User banks allow you to store frequently used text in text fields in any form. By storing text in banks, users can avoid needing to rewrite common content for each document. User banks can be made by any user and are only accessible to the user who created it.

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**Discussion 2:** 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.

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**Activity 1:** Create and use a user bank value.

1. In the **Decision** section of your document, click into the **LPAC Meeting Minutes/Notes** field.
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] has demonstrated his English proficiency and will be reclassified.”
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.

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**Discussion 3: 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.

TOPIC: SIGNATURES

**Discussion 1:** Once a placement determination is made in the LPAC Review document, all document authors, collaborators, and meeting participants can easily sign the document electronically. Any place where a signature can be added, 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.

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**Activity 1:** Electronically sign a document.

1. Navigate to the **LPAC Signatures** section.
2. Locate a signature field (denoted with a pen icon) and click on it to open the **Adopt and Sign** popup.
    - You and your partner(s) will need to sign in separate fields.
3. Type your name into the **Full Name** field.
4. In the **Draw Signature** box, use your finger, mouse, or trackpad to draw your signature.
5. Check the box to certify your signature.
6. Click **Adopt and Sign** to apply your signature to the document.
    - You and your partner(s) will be able to see each other's signatures added in real-time.

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**Discussion 2:** Additionally, rather than writing your signature each time, you can store your signature and "stamp" it into signature fields with one click.

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**Activity 2:** Store your signature.

1. Click on your Account Menu in the top right of your screen and select **Store signature**.
2. Click into the signature field, add your signature, and fill out the rest of the **Store Signature** box.
3. Click on **Store Signature** and then **OK** to save your signature.

> **Callout:** Now in non-guardian signature fields, you will see a stamp icon and by clicking on the stamp, your stored signature will be applied automatically.

## LESSON: RECLASSIFICATION

**Time:** 15 minutes

### TOPIC: PENDING RECLASSIFICATION

**Discussion 1:** The LPAC Annual Review is due by the end of the school year. If a student's placement decision is dependent on a review of upcoming state assessment results, you can do a Pending Reclassification workflow. In this case, you can select **Pending Reclassification** as the Decision, and make a temporary decision regarding Next Year's Placement.

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**Demonstration 1:** Document that a student is Pending Reclassification.

1. Select **Pending Reclassification** under **Decision**.
2. Select either **Continue ESL Program** or **Exit ESL Program** under **Next Year's Placement**.
3. Fill out the remaining required fields in the document.
4. Mark the document complete.
5. Show that there is a deadline to Amend the document at the beginning of next school year.

### TOPIC: AMENDMENTS

**Discussion 1:** In order to make a significant change to a document, the owner can create a formal amendment. For the Pending Reclassification workflow, in order to update the temporary placement, you can Amend the document once you are able to review the student's assessment results and finalize the placement decision.

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**Demonstration 1:** Amend the LPAC Annual Review.

1. Click on the lock icon in the document.

2. Select **Amend**.
3. Click OK to the popup warning.
4. At the top of the document, click **add Amendment**.
5. Enter an amendment date and summarize the reason.
6. In the **Decision** section, select **Reclassify as English Proficient / Enter Monitoring**.
7. Make sure **Next Year's Placement** is **Exit ESL Program**.
8. Mark the document complete again.

## TOPIC: DOCUMENT HISTORY

**Discussion 1:** SameGoal has a **Document History** panel in every document that is available to any user with access to the document. This helps to track:

- Document edits (what was changed, who made then change, and when)
- Document views
- Document share events (who the document was shared with, what level of permission they have)
- Guardian share email status
- Major document events such as Amendments

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**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.

   **Callout:** You can see major document events such as when the Amendment was added.

3. Exit out of **Document History** by clicking on the icon in the toolbar again.

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**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. This means you will always have access to the originally completed version of a document even after it has been amended.
- 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.

## TOPIC: EXITING EMERGENT BILINGUAL

**Discussion 1:** After a student is reclassified as English proficient, the district must continue monitoring them for two years. After the LPAC Review, you'll need to send two different documents to the parents: **Parental Notification on Student Progress** and **Parental Notification of Reclassification and Approval of Exit**. The student will not enter monitoring until you have notified the parents and they agree to the reclassification.

Again, there are multiple versions of each of these forms depending on which specific program the student was in.

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**Activity 1:** Create the required notification documents.

1. On your student's **Documents** tab, create a **Parental Notification on Student Progress - ESL**.

   **Callout:** Test information from the LPAC Review will automatically pull into the document.

2. At the bottom of the document, select the option to **Exit the ESL program**.
3. Back on your student's **Documents** tab, create a **Parental Notification of Reclassification and Approval of Exit - ESL**.

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**Discussion 2:** Both documents should be shared with the parents and the parents will need to sign and return the Notification of Reclassification before it can be completed.

Once this document is completed, if the parents agree, the student will be unenrolled from the **Emergent Bilingual** program and enrolled in the **Reclassification Monitoring** program.

## TOPIC: RECLASSIFICATION MONITORING

**Discussion 1:** At the end of the school year the year after the student has been identified as English proficient, a Monitoring After Reclassification document will need to be completed. TIDE scores will also pull into this document. This document will need to be completed twice in the two years after reclassification before the student will officially be unenrolled from the Emergent Bilingual program.

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**Activity 1:** Create a Monitoring After Reclassification document.

1. Create an **LPAC Monitoring of Reclassified Student** document.
2. At the top of the document, select **1st Year Monitoring**.
3. In the **Decision** section, select **Continue to Year 2 LPAC monitoring**.

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**Discussion 2:** If a reclassified student is not on track, they can re-enter the program or receive instructional interventions. However, if the decision is made to continue to year 2 monitoring, another monitoring document can be completed at the end of the following year. In that document you would select **2nd Year Monitoring** and **Conclude Year 2 LPAC monitoring** instead.

When the monitoring document is completed, a **Parental Notification on Student Progress - Monitoring After Reclassification** will need to be shared with the parents. This is very similar to the other notification documents. You'll to indicate the LPAC team's placement decision and pass the document along to the parents.

The student will only fully exit the program after the Parental Notification on Progress is completed after the second year of monitoring.

## LESSON: ADDITIONAL WORKFLOWS

**Time:** 10 minutes

### TOPIC: DECISIONS REGARDING ASSESSMENTS

**Discussion 1:** In the middle of the year, you can use a Decisions Regarding Assessments document to help assess a student's understanding of different topics to determine what assessments and accommodations they need. If the district has a TestHound integration, information from this document can be sent directly to TestHound automatically. There are two form variants: one for grades K-5 and one for grades 6-12.

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**Activity 1:** Create an LPAC Decisions Regarding Assessments.

1. Navigate to your student's **Documents** tab.
2. In the **Create new** dropdown, search for **LPAC Decisions Regarding Assessments**.
3. Select the appropriate form depending on what grade your test student is in.
    - If you do not know what grade your test student is in, you can check on their **Details** tab.
4. Create the document.
5. Scroll through the document to review what information is included.

### TOPIC: INSTRUCTIONAL ACCOMMODATIONS

**Discussion 1:** If a student is receiving accommodations, it can be helpful to document these in SameGoal to pass along to classroom teachers.

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**Activity 1:** Create and fill out an EB Instructional Accommodations log.

1. Navigate to your student's **Documents** tab.
2. Create an **EB Instructional Accommodations** document.

3. Provide start and end dates.
4. Click **add Accommodation**.
5. In the **Accommodation** field, provide an example accommodation.
6. On the **Subject** side, select one or more of the subjects.

## TOPIC: LPAC OTHER

**Discussion 1:** If an Emergent Bilingual student fails a class and you need to conduct a Failure Review, you can do so using an **LPAC Other**.

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**Activity 1:** Create and fill out an LPAC Other.

1. Navigate to your student's **Documents** tab.
2. Create an **LPAC Other** document.
3. Scroll through the document to review what information is included.

## 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.

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**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.