

Training Outline

Print this out and use it to follow along and pace yourself while leading a training (based on a 2 hour training duration).

Getting Started (20 minutes)		
Introduction to SameGoal	5 minutes	<ul style="list-style-type: none"> • Discussion: What is SameGoal? • Discussion: Why the district is moving to SameGoal • Discussion: Overview of training
Logging In	10 minutes	<ul style="list-style-type: none"> • Discussion: How does login work for the district? • Activity: Log into SameGoal
Screen Overview	5 minutes	<ul style="list-style-type: none"> • Discussion: Working with test data • Discussion: Left menu navigation • Activity: Check building permissions
Creating Documents (15 minutes)		
Search for Students	5 minutes	<ul style="list-style-type: none"> • Discussion: Navigating to a student's Documents tab • Activity: Search for your test student • Discussion: Tabs on a student's page
Create a Document	3 minutes	<ul style="list-style-type: none"> • Discussion: Create new dropdown • Activity: Create a referral for your test student • Discussion: When a document is created
Editing a Document	4 minutes	<ul style="list-style-type: none"> • Discussion: Tools to edit documents • Activity: Add text to a document and format it

		<ul style="list-style-type: none"> • Activity: Add and remove a section
Autosave	3 minutes	<ul style="list-style-type: none"> • Discussion: Documents save automatically • Activity: Explore autosave
Completing Documents (10 minutes)		
Completing a Document	4 minutes	<ul style="list-style-type: none"> • Discussion: All required fields must be filled out • Activity: Complete a document • Discussion: When a document is completed • Discussion: Documents can be incompleted
Program Participation	2 minutes	<ul style="list-style-type: none"> • Discussion: Student will be under eligibility review for G/T • Activity: View a student's Programs tab
Deadlines	4 minutes	<ul style="list-style-type: none"> • Discussion: See info by hovering over the program badge • Activity: View a student's Deadlines tab • Discussion: Deadlines calendar • Activity: View the Deadlines calendar
Parent Communication (10 minutes)		
Consent for Assessment	2 minutes	<ul style="list-style-type: none"> • Discussion: You need to obtain parental consent for an assessment • Activity: Create a Consent for Assessment document
Share With Parents	5 minutes	<ul style="list-style-type: none"> • Discussion: Documents can be shared with parents electronically • Activity: Share your document with a parent • Discussion: Parents can fill out parent-specific fields • Activity: Fill out the rest of the document and mark it complete
Translation	3 minutes	<ul style="list-style-type: none"> • Discussion: You can request document translations within SameGoal • Activity: Request a document translation

		<ul style="list-style-type: none"> • Demonstration: Show a translated document
Collaboration (20 minutes)		
Identification Profile	4 minutes	<ul style="list-style-type: none"> • Discussion: Identification Profile will need to be completed by 3/1 if the parents consent • Activity: Create an Identification Profile and begin filling it out • Discussion: Scores, district cutoffs, and parent/teacher survey information will pull into the document • Demonstration: Fill out the Identification Matrix
Sharing a Document	4 minutes	<ul style="list-style-type: none"> • Discussion: Documents can be shared with other users • Activity: Share a document with another user • Discussion: Permission levels • Discussion: When a document is shared with you
Collaborative Editing	6 minutes	<ul style="list-style-type: none"> • Discussion: Users can work in one document simultaneously • Activity: Work in a document with another collaborator
Chat	2 minutes	<ul style="list-style-type: none"> • Discussion: Users can securely chat with other users • Activity: Send a message using the Chat feature • Discussion: Chat is not attached to a single document or student
Document History	4 minutes	<ul style="list-style-type: none"> • Discussion: Document events are tracked with Document History • Activity: View events in the Document History panel • Discussion: Document History is helpful in several ways
Meetings and Signatures (15 minutes)		

Validations	5 minutes	<ul style="list-style-type: none"> • Discussion: Documents run validation checks in real-time • Discussion: Validation Mode can help you move through errors quickly • Activity: Enter into Validation Mode • Discussion: Documents cannot be completed until all checks pass
Holding Meetings	5 minutes	<ul style="list-style-type: none"> • Discussion: Meeting Mode can be used to conduct meetings • Activity: Share a meeting and enter into Meeting Mode • Demonstration: Use Meeting Mode to group multiple documents together
Signatures	5 minutes	<ul style="list-style-type: none"> • Discussion: SameGoal supports electronic signatures • Activity: Electronically sign your document • Discussion: You are able to save your signature and stamp it into documents • Activity: Store your signature
Education Plan (15 minutes)		
Determination Letter	3 minutes	<ul style="list-style-type: none"> • Discussion: After completing the Identification Profile, you must notify the parents of the decision • Activity: Create and fill out a Determination Letter
Plan Overview	4 minutes	<ul style="list-style-type: none"> • Discussion: If the student qualifies for services, an Education Plan can be developed • Activity: Create and review an Education Plan
Bank Values	4 minutes	<ul style="list-style-type: none"> • Discussion: Bank Values allow you to store frequently used text • Discussion: Bank Values support name and pronoun substitution • Activity: Create and use a user bank value
Amendments	4 minutes	<ul style="list-style-type: none"> • Discussion: In order to make a significant change to a completed document, you can amend it

		<ul style="list-style-type: none"> • Demonstration: Create a formal amendment
Additional Tools (10 minutes)		
Progress Reports	5 minutes	<ul style="list-style-type: none"> • Discussion: Progress can be tracked with a Progress Report • Activity: Create a progress report and chart progress
Attachments	3 minutes	<ul style="list-style-type: none"> • Discussion: Several different file types can be added to documents as an attachment • Activity: Add an attachment
Printing a Document	2 minutes	<ul style="list-style-type: none"> • Discussion: Documents can be printed or downloaded at any point • Activity: Print a document with attachments
Wrap Up (5-30 minutes)		
Support	5 minutes	<ul style="list-style-type: none"> • Discussion: SameGoal has many online support resources • Activity: Access SameGoal's support resources
Questions	Varies	<ul style="list-style-type: none"> • Discussion: Ask questions
Explore Your Environment	Varies	<ul style="list-style-type: none"> • Activity: If time, explore your environment