samegoal

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	• **Discussion:** What is SameGoal? • **Discussion:** Why the district is moving to SameGoal • **Discussion:** Overview of training
Logging In	10 minutes	• **Discussion:** How does login work for the district? • **Activity:** Log in to SameGoal
Screen Overview	5 minutes	• **Discussion:** Working with test data • **Discussion:** Left menu navigation • **Activity:** Check building permissions
Creating Documents (15 minutes)		
Search for Students	5 minutes	• **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	• **Discussion:** Create new dropdown • **Activity:** Create a referral for your test student • **Discussion:** When a document is created
Editing a Document	4 minutes	• **Discussion:** Tools to edit documents • **Activity:** Add text to a document and format it • **Activity:** Add and remove a section

Autosave	3 minutes	• **Discussion:** Documents save automatically • **Activity:** Explore autosave
Completing Documents (10 minutes)		
Completing a Document	4 minutes	• **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	• **Discussion:** Student will be under eligibility review for G/T • **Activity:** View a student's Programs tab
Deadlines	4 minutes	• **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	• **Discussion:** You need to obtain parental consent for an assessment • **Activity:** Create a Consent for Assessment document
Share With Parents	5 minutes	• **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	• **Discussion:** You can request document translations within SameGoal • **Activity:** Request a document translation • **Demonstration:** Show a translated document
Collaboration (20 minutes)		

Identification Profile	4 minutes	• **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	• **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	• **Discussion:** Users can work in one document simultaneously • **Activity:** Work in a document with another collaborator
Chat	2 minutes	• **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	• **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	• **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	• **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	• **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	• **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	• **Discussion:** If the student qualifies for services, an Education Plan can be developed • **Activity:** Create and review an Education Plan
Bank Values	4 minutes	• **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	• **Discussion:** In order to make a significant change to a completed document, you can amend it • **Demonstration:** Create a formal amendment
Additional Tools (10 minutes)		
Progress Reports	5 minutes	• **Discussion:** Progress can be tracked with a Progress Report • **Activity:** Create a progress report and chart progress
Attachments	3 minutes	• **Discussion:** Several different file types can be added to documents as an attachment • **Activity:** Add an attachment
Printing a Document	2 minutes	• **Discussion:** Documents can be printed or downloaded at any point • **Activity:** Print a document with attachments
Wrap Up (5-30 minutes)		
Support	5 minutes	• **Discussion:** SameGoal has many online support resources • **Activity:** Access SameGoal's support resources
Questions	Varies	• **Discussion:** Ask questions
Explore Your Environment	Varies	• **Activity:** If time, explore your environment