samegoal

Training Manual

Before training users using the Training Outline, read through this training manual and complete the preparation steps.

NEED TO KNOW

This training contains 10 different **Lessons**, and each of these lessons cover multiple **Topics**.

- Lessons are the larger, overall themes in SameGoal.
- Topics focus on more specific information and workflows.

Throughout this training, you will utilize a few different training methods which will be indicated by different icons:

Discussions: This is the simplest training method. During discussions you can verbally explain SameGoal functionality and workflows and answer any questions that attendees might have. The training outline will include all of the important information that attendees will need to know.

Activities: These are exercises that both the trainer and the attendees can complete. Each activity includes step by step instructions. Encourage users who are logged into to complete the activity along with you and help walk them through the steps.

Demonstrations: Only the trainer should do the demonstration steps. Demonstrations are used when a visual example would be helpful, but the attendees may not be able to complete the steps on their own or the demonstration is so quick that it's easier to only have the trainer do it. Demonstrations include step by step instructions for the trainer.

At the beginning of each lesson, you will be provided with helpful information about the lesson:

Time: Each lesson has a time suggestion for how long the lesson should take. However, the time it takes to complete a lesson can vary depending on how many questions there are, if you skip some of the sections, etc.

Preparation steps: Before you begin a lesson, you may need to complete some preparation steps in order to get ready for some of the activities or demonstrations. Not all lessons require preparation, but if preparation is needed, it will be called out at the beginning of the lesson.

Sections to skip: There are some topics, activities, and demonstrations that you might skip depending on which edition of SameGoal the district is on, district policy, the state of the district's environment, and whether you complete preparation for an optional demonstration. At the beginning of each lesson there will be a list of possible sections to skip.

There are two more icons you will see throughout the training:

Callout: Additional information to provide or "call out" to attendees, but it may be in the middle of an activity/demonstration or may not require a full discussion.

Important: Additional information that is helpful to you, the trainer, but doesn't necessarily need to be shared with all of the attendees.

RECOMMENDATIONS

- Try to set aside at least 2 hours for this training, although it could take up to 2 and a half hours with questions.
- When possible, train groups of 20 to 30 users at a time. Smaller group sizes limit distractions and make it easier for users to have their questions addressed.
- As a trainer, you have a lot of knowledge about how software works and some knowledge of how other district policies work, but you might not be able to make definitive calls about this district's policy. As many questions will likely arise during training, it is helpful to have someone in attendance who can either make decisions regarding district policy or someone who can follow up on these questions and get back to everyone.

PREPARATION

Preparation: In order to lead an effective training session, there are a number of items you should know about the district before you begin:

- Why the district is transitioning to SameGoal and what problems SameGoal will help them solve.
- Other local districts that use the system.
- Whether or not PDFs have been imported and what key program data has been loaded.
- Which edition of SameGoal the district is on.
- If there are specific district policy items the district wants you to discuss.
- How login works for the district (SSO, ClassLink, OIDC, etc.). If the district has a link to SameGoal on their website.
- What integrations have been set up and what SIS the district uses.
- Verify the environment has been created and know the district domain.
- Whether or not automatic translation approval is enabled.
- Whether or not the district will allow users to copy from existing documents.

Preparation: Load test students into your system for users to follow along with.

1. Download the Training Students file to your device:
    - 50 Training Students
    - 100 Training Students
    - 300 Training Students
    - 500 Training Students
    - 1,000 Training Students
2. In SameGoal, when logged in as an administrative user, go to **Settings** > **Bulk Loader**.
3. Select **Choose File** for Students and select the Test Student file you just downloaded.
4. Click **Load**. Students will automatically be added and a training building will automatically be created.

5. If you go to **Students / create new**, you can confirm the load worked by searching for the test students.

Preparation: If they don't already, make sure all users who need an account have been added as a user in your environment. They should all receive an email containing a link to sign in for the first time. All users attending training will need access to forms for test students in the training building. Ensure they have a Special Education user role assigned, and add the training building to their user role.

1. If needed, create a user role and assign the user role to all training users.
    - TIP: Assign user roles in bulk to save time.
2. Update user roles for all training users to include permissions in the training building.

Preparation: Create an Individualized Education Program and fill it out so that it's ready to be completed.

1. Create an **Individualized Education Program** for the test student with the last name Test002 (should have been added with the test student import).
2. Fill out Section 2 to indicate the student is eligible so they are enrolled in the program when the document is completed.
    - Answer **No** for all of the Analysis of Determinant Factors questions.
    - Select **Yes** for "The child has a disability".
    - Document at least a primary disability.
    - Select **Yes** for "By reason of the disability, the child needs special education and related services".
3. Fill out Section 6 to have at least one goal so that the goal will automatically populate a Progress Report when it's created.
4. In Section 7a, add special education as an instructional service to be changed during the amendment demonstration and so that it automatically populates the Instructional Log when it's created.
5. Also in Section 7a, add accommodations so that they automatically populate the Accommodations Log when it's created.
6. Enter into Validation Mode and fill out all required fields and satisfy all validation errors so the document is ready to be completed. You should see a pale green check mark in the top right corner.
7. Leave the document incomplete so you can complete it during training.

Optional Preparation: Download this PDF of a translated document to show as an example during training:

- Texas IEP Translated Into Spanish

Optional Preparation: Enter a guardian email for your test student's guardian to show during training:

- Navigate to Test001's **Details** tab.
- Click **add Parent/Guardian**.
- Enter your personal email in the **email** field.
    - You will not be able to use a district email when sharing with a parent/guardian.

Optional Preparation: Create a district bank to show during training.

1. Navigate to **Settings** > **District Banks**.
2. Locate the **Individualized Education Program** form and click on it.
3. Go to Section 7a and click **add Special Education**.
4. Click into the **Provider Title** field and select **edit bank**.
5. Click **add** and enter in a provider title before hitting **done**.

Optional Preparation: Complete a Prior Written Notice and a Consent for Services to avoid the appearance of past due deadlines during training.

1. Create a **Prior Written Notice** for Test002 student.
2. Ensure the date is after the IEP date.
3. The purpose should be **propose** to **initiate** the **educational placement of the child**.
4. Complete the document.
5. Create a **Consent for Services** for Test002 student.
6. Ensure the date received is after the IEP date.
7. Answer **Yes** to **I grant my informed consent...**
8. Complete the document.