samegoal

Document Prefill

Information prefill

- When a document is created, it is prefilled with relevant student/parent demographics.
- These demographics flow from the student's **Details** tab, which is updated nightly by the demographics integration with your student information system (SIS).
- If you start a document months in advance, you may wish to get an updated copy of student/parent demographics just before the meeting.
    - You'll typically find an **Update Student/Parent Info** button at the top of any section that prefills information.
    - When this button is clicked, the demographics information from the student's **Details** tab is re-pulled into the document.

Tip If the updated information is repeated (e.g. multiple parents allowed on a form), newly updated information will be appended at the end of the repeated items list rather than replace any item. In this case, you'll need to delete any older info. For updating Progress Reports, it is best practice to remove the incorrect data before clicking the **Update** button. This is especially helpful when a Progress Report was created before the newest IEP has been completed.

Autocopy

Autocopy from one document section to another often occurs as relevant. For example, after entering an IEP start date, this date may automatically copy in as the default start date for any IEP-related services.

Tip If the original source of information copied in changes over time, the destination field will not be automatically overwritten so as to not inadvertently change content within the document without an author's notice.