samegoal

Create a New Document

Users can create new documents for students in SameGoal if:

- They have access to the student
- They have permission to create the given form type in the student's building

Your student and form permissions are set at an administrative level based on your user roles and building permissions. If you do not see a student you should have access to when searching on **Students / create new**, contact an administrative user at your district to have your permissions updated. Similarly, if you do not see a form you should have the ability to create in the **Create new** dropdown on a student's **Documents** tab, contact an administrative user at your district to have your permissions updated.

Create a document

Steps *To create a new document:*

1. Go to **Students / create new** in the left menu.
2. Search for the student you wish to create a document for.
3. Click on the student's name. You will land on their **Documents** tab.
4. Click the **Create new** dropdown and select the form you would like to create.
    - To find the form type, you can scroll through the list or begin typing the name of the form.
5. Click the **Create** button. You will automatically be redirected to the new document.

Tip For many form types, the system will not allow multiple documents of the same form type to be open for a student at a given time. For example, if an IEP is in progress for Billy, another IEP cannot be started for him until the current one is marked complete. If you try to create a new IEP for Billy, you will see a message stating there is already an incomplete document using the form. Depending on your access to documents for this student, you may or may not be able to see the incomplete document. If you require access to the document already in progress, you can request document access.

Create a document from a deadline

SameGoal automatically calculates and keeps track of deadlines based on completed documentation. If you are trying to create a document in order to satisfy a deadline, you can create the required document directly from the deadline. This is especially helpful if you're not exactly sure which form you need to create to satisfy the deadline, such as when multiple forms have very similar names.

Steps *To create a document from a deadline:*

1. While on a student's page, navigate to their **Deadlines** tab.
2. Locate the deadline you wish to create a document for.
3. Click on the blue plus button next to the form name. You will automatically be redirected to the new document.

Tip Some deadlines have multiple forms listed because the deadline can be satisfied by more than one form type. In this case, ensure you are creating the appropriate document based on the student's needs.

Bulk create documents

In order to help save time, you can bulk create documents for multiple students at once.

Steps *Steps to bulk create documents:*

1. Go to **Students / create new** in the left menu.
2. Search for the students you wish to create a new document for. To do this, you can copy and paste in a list of student IDs or use filters.
3. Select all students you wish to create a document for. If you want to select all listed students, click on the select all checkbox in the top left corner.
    - If there are more than 50 students listed, you will need to click **Select all (#) items** at the top of the screen.
4. Click on the **Actions** menu and select **Create Document**.
5. In the **Bulk Create Documents** popup, choose which document to create.
6. Click **Create (#) Documents**.

After you create the documents, there will be a message at the top of the screen informing you how many documents were created and if there were any errors. Potential errors include:

- The student already has an incomplete document of the selected form type
- The user does not have permission to create the selected form type in the student's building

Tip It can be helpful to use the **Deadlines** filter to search for students to bulk create a document for.