Holding Meetings

Districts hold meetings in various different ways. Below are some of the main workflows when holding meetings in SameGoal.

In-person meeting, signatures on a printed hard copy

Steps *Suggested workflow:*

1. Walk through the document (e.g. IEP) in person with all team members on a computer.
2. Make all edits during the meeting in SameGoal.
3. Ask the parent/guardian what they intend to indicate in the parent signature fields (e.g. agree, disagree, etc).
4. Mark the discussed parent/guardian response in the document.
5. Mark the document complete (removes draft watermark).
6. Print a hard copy.
7. Parent/guardian and staff sign hard copy.
8. Scan, upload and attach hard copy of signatures.

In-person meeting, electronic signatures used

Steps *Suggested workflow:*

1. Walk through the document (e.g. IEP) in person with all team members on a computer.
2. Make all edits during the meeting in SameGoal.
3. Staff apply their electronic signature.
4. Parent/guardian applies their electronic signature.
5. Mark the document complete (removes draft watermark).
6. Print or share the document electronically with parent/guardian.

Remote meeting (phone or online), electronic signatures used

Steps   *Suggested workflow:*

1. Draft the document. Leave it incomplete.
2. Share the document electronically with parent/guardian.
3. During the meeting, walk the parent/guardian through the document remotely (e.g. clicking from field to field autoscrolls the parent/guardian viewer to most recently visited field in order for them to follow along).
4. Make all edits during the meeting in SameGoal.
5. Staff apply their electronic signature.
6. Parent/guardian signs document electronically.
7. Mark the document complete (removes draft watermark).
8. Parent/guardian retains electronic access to completed document.

Remote meeting (phone or online), signatures on a printed hard copy

Steps *Suggested workflow:*

1. Draft the document. Leave it incomplete.
2. During the meeting, talk parent/guardian through the document.
3. Ask the parent/guardian what they intend to indicate in the parent signature fields (e.g. agree, disagree, etc).
4. Mark the discussed parent/guardian response in the document.
5. Mark the document complete (removes draft watermark).
6. Print a hard copy. Staff sign hard copy.
7. Mail hard copy to parent/guardian for signature.
8. Parent/guardian signs and mails back signature page.
9. Scan, upload and attach hard copy of signatures.

Handling document review

Steps *Suggested workflow:*

Some districts' workflow requires a district representative review each document. In this case, we recommend each document is marked complete prior to review, preferably at the end of each meeting. Marking documents complete is best practice to ensure no unexpected changes occur after a parent/guardian meeting, and all changes that happen afterward are handled correctly procedurally. Handling changes after a document is marked complete is still possible (see below).

Handling changes after meetings

Steps   *Suggested workflow:*

- If corrections are needed, admin users can mark the document incomplete (not create a formal amendment).
  - Example: A wrong state reporting element not shown on the final PDF was selected.
  - Solution: Admin users can easily incomplete, fix and re-complete the document without creating an amendment.
- If an amendment is needed, use the blue **Amend** button to re-open the document (amendments require a document be marked complete, **THEN** amended).