samegoal

# Mark Documents Complete

Once all information has been entered into a document and all necessary meetings (if any) have been completed, the document should be marked complete in the program.

**Documents that are marked complete:**

- Become read-only and are no longer editable
- Can be amended by the owner or incompleted by an administrative user if a change needs to be made
- Are used for tracking program participation and deadlines
- Can be copied to create a new document
- Are ready to be acknowledged
- May still have attachments added (e.g. signed signature pages)

**Documents that are left incomplete:**

- Are vulnerable to changes after parent meetings
- Prevent new documents of the same form type from being created
- Prevent goal/objective copy over to progress reports
- Are not included in calculations for program participation tracking, deadlines, or state reporting

## Mark a document complete

Only the document **Owner** (or an administrative user) has access complete a document. You can view who the **Owner** of the document is on the **Share** tab along the top.

**Steps** *To mark a document complete:*

1. Navigate to the document you wish to complete.
2. Ensure that all validation errors have been satisfied.
3. Click on the 🔒 icon in the toolbar.

4. Select **Complete**.

Tip If your district is on the PRO edition of SameGoal, you might be prompted to share the document with student team members upon completion if they will be required to acknowledge receipt of the document but currently have no access to it.

## Bulk complete documents

Multiple documents can be marked complete at once to help save time.

**Steps** *Bulk complete documents:*

1. Visit a document list page and search for the documents you wish to complete.
    - Use the **Documents** filter to search for documents you own that are currently incomplete.
2. Select the documents you wish to complete.
3. Click on **Actions** > **Complete**. A lock icon will appear next to the document or documents that have been completed.
    - You will only be able to bulk complete documents that do not have any outstanding validation errors.

## Editing completed documents

- If a minor correction needs to be made to a document after it has been marked complete, an administrative user can re-mark the document incomplete.
- If a significant change must be made to a plan document after it has been marked complete, a formal amendment must be made.