samegoal

Program Deadlines

Program deadlines tracking calculates upcoming document deadlines directly from existing documents as they are completed. For specific deadlines tracking guidance by program, visit the program-specific guides.

Tip You can see deadline information for students who you have an educational interest in.

Deadlines tab

The **Deadlines** tab appears when you visit a student's page. This tab displays upcoming deadlines, past due deadlines, and any skipped documents or errors. The deadlines table includes:

- **Program**: The special program the deadline is related to.
- **Due**: Date the requirement needs to be completed by.
- **Deadline**: A short description of what the deadline is.
- **Required**: What specific form needs to be completed and the exact information that is required to satisfy the deadline.
- **Assigned**: The user who is set as the owner of the completed document that the deadline was determined from. The deadline is considered to be assigned to them.
- **Determined From**: The completed document and fields that triggered this deadline.

Tip If there are any incomplete documents that would affect deadlines if they were to be completed, they will be listed above the deadlines table.

Tip If you click on a deadline in the table, it will be expanded and you can view more detailed information about the deadline.

Tip Clicking the blue + button next to the form name in the Required column will create a new document. This document can be used to satisfy the deadline.

Deadline indicators

A program participation badge displays throughout the application next to any student when they currently participate in a given program (as determined from the **Programs** tab). If there are upcoming or missed deadlines for a student, a deadline indicator will appear on the top right corner of the associated program participation icon with the PLUS or PRO edition of SameGoal.

- Red dots indicate missed deadlines
- Orange dots indicate a deadline due within the next 7 days
- Yellow dots indicate a deadline due within the next 30 days

When you hover over the program participation icon, you will see a summary of upcoming and past due deadlines.

Deadlines calendar

Users on the PLUS or PRO edition on SameGoal have access to the Deadlines calendar in the left menu. By default, this calendar displays deadlines that are assigned to you, but you can switch the **Assigned to me** dropdown to **All** to see all deadlines for students who you have an educational interest in.

Administrative users may also switch the dropdown to **Unassigned** to see deadlines that do not have an owner. Deadlines become unassigned when the previous owner loses access to the document that triggered the deadline. To reassign a deadline without an owner, transfer ownership of the document that triggered the deadline to a new user.

You may view deadlines by day, week, or month, as well as in a chronological list format. You can also filter the deadlines by deadline, building, and grade.

Tip Clicking on a deadline in the calendar will display additional information including which student it's for, which document the deadline was determined from, and what is required to satisfy the deadline.

Reports

Each program with associated deadlines has a Deadlines report. This report can be found by going to **Reports**, selecting the program you'd like to see deadlines for, and choosing **Deadlines**.

Administrative users can run a single report to see all deadlines across the district regardless of program. This report can be found by going to **Reports** > **System** > **Deadlines**.

Notifications

Users on the PRO edition of SameGoal can receive deadline notifications:

- **Deadlines - Due Today:** You have deadlines due today that are assigned to you
- **Deadlines - Overdue:** You have overdue deadlines that are assigned to you
- **Deadlines - Upcoming:** A weekly snapshot summary of deadlines due within the next 30 days that are assigned to you
- **Deadlines - Unassigned:** A weekly snapshot summary sent to administrative users of deadlines due within 30 days that are unassigned

Provisional deadlines

Some deadlines are labeled as **Provisional**, meaning they are subject to change. This happens when a deadline is calculated based on all available data, but additional data may arise that affects how the deadline is calculated.

For example, if a plan document is due 60 days after consent or 30 days after an evaluation (whichever is sooner), we will calculate the deadline once consent is received. However, once the evaluation is completed, the deadline may need to be recalculated if 30 days after the evaluation date is sooner than 60 days after the consent date.