samegoal

Screen Overview

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Account Menu

In the top right, you'll see a circle with the first letter of your name inside. This is your account menu. When you click your account menu, you'll see options to:

- **Change password**: Change your password for SameGoal.
- **Store signature**: This is a PRO feature that allows you to store your signature and easily 'stamp' it into documents later.
- **Display density**: Adjust how sections in forms are displayed.
- **Add account**: If you work in multiple different districts, link your accounts together for easier log in and user bank management.
    - If you have linked accounts, you will see the linked accounts listed in your Account Menu. You may click on the linked accounts to switch between them.
- **Sign out**: Always log out when you are finished working in SameGoal.

Support Menu

Next to the Account Menu, there is a ⓘ icon. This is the Support Menu, which contains the following:

- **Help Guide**: Links to online support guides. These guides include pages with step-by-step instructions and videos that explain how different SameGoal tools/features work as how to document common program workflows.
- **Blog**: Links to SameGoal's blog page. When there are new product and feature updates, blog posts are released that highlight the important things to know.
    - You'll also receive an in-application notification at the top of your screen that links to a blog post when it is relevant to you.
- **Service Status**: Links to the service status page where you can check the status of the application and get up-to-date information on disruptions and outages.
- **Events**: Links to the Events page where you may register for various events being offered.
    - Examples of events SameGoal offers are refresher training sessions and product update webinars.
- **District Support**: Contact information for the district or local Help Desk will be listed here if it's been provided by your district.
- **SameGoal Support**: Contact information for SameGoal's Help Desk.
    - Includes a Call-In Code that you can use when calling SameGoal for support.

Notifications Tray

To the left of the Support Menu, there is a 🔔 icon. This is your Notifications Tray, which displays notifications and allows you to approve or deny in-application requests.

Left Menu

- **Dashboard**: This page gives users a quick and easy way to see important information, such as upcoming deadlines and meetings.
- **Recent**: This is the default landing page when you log in to SameGoal and shows your 50 most recent documents. If you step away, do something else or forget what documents you were working on, visiting the **Recent** page is a great tool for hopping back in quickly. Documents are added to the **Recent** page when:
    - You create a document
    - You edit a document
    - You view a document
    - You share a document
    - Someone shares a document with you
- **Caseload**: These are documents on your caseload. A document appears on your caseload when it is starred. To manage your caseload, you can manually star/unstar documents by clicking on the ☆ next to the document, but documents are also automatically starred/unstarred when:
    - You create a document (starred)
    - Someone shares a document with you (starred)
    - You are removed from the collaborative team on a document (unstarred)
- **All**: These are all of the documents you have access to, whether or not they are on your caseload. Depending on your permissions, you may have default access to documents or you may have access to documents because they have been explicitly shared with you.
- **Deadlines**: Users on the PLUS or PRO edition of SameGoal have access to a deadlines calendar that can display upcoming and past due deadlines.
- **Students / create new**: This page allows you to to search for students. This is a great place to start when you want to create a new document.
- **Users**: Add, update, and manage users (only visible to administrative users).
- **Settings**: Manage district environment settings (only visible to administrative users).
- **Reports**: Any reports that you are able to run given your user role permissions.

💡 Tip Both **Caseload** and **All** document list pages contain many documents. These list pages are often used with the filters and actions buttons at the top to perform bulk actions or bulk print documents.

My Students

The My Students list contains students for whom at least one document is starred (and therefore is on your caseload). This list provides a quick way to navigate between students and documents relevant to you at any given time.

Tip If you are currently viewing the Chat tab, you can click on the icon to be brought back to your **My Students** list.

Chat

Secure, built-in chat allows you to discuss upcoming documents, due dates and meetings with colleagues.

Tip If you are currently viewing your **My Students** list, you can click on the icon to switch to the Chat tab.