Screen Overview

It's helpful to get oriented with the main areas of the application.

When you log in, you're taken to your **Recent** tab by default.

Account Menu

In the top right, you'll see a circle with the first letter of your name inside. 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 display density for sections in forms.
- **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. When you click on this icon, you will see the Support Menu, which contains the following:

- **Help**: Links to online support guides.
- **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 especially relevant to you.
- **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**: If your district has its own help desk, contact information will be listed in the support menu.
- **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 your account menu is your Notifications Tray [🔔]. This tray displays notifications and allows you to approve or decline in-application requests.

Left Menu

In the left menu above a gray horizontal line, you'll see three document list pages:

- **Dashboard**: This page gives users a quick and easy way to see important information, such as upcoming deadlines or meetings.
- **Recent**: These are the documents you have recently viewed, edited, or been added to by a team member.
  - This page shows the 50 most recent documents in reverse chronological order (most recent at the top).
  - This is the default landing page in the application when you login.
  - 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.
- **Caseload**: These are documents on your caseload.
  - A document appears on your caseload when it is starred.
  - Documents are starred when:
    - You created them yourself
    - You are added as a collaborative team member
    - You manually star a document you have access to
  - Documents can be unstarred (and therefore removed from your caseload) at any time
  - For more information, see manage your caseload.
- **All**: These are all documents you have access to, whether or not they are on your caseload.

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

Below the gray horizontal line, you'll see additional application areas depending on your permissions and the version of SameGoal you are on:

- **Deadlines**: Users on the Pro or Plus edition of SameGoal have access to a deadlines calendar that displays deadlines assigned to you.
- **Students/create new**: This page allows you to to search for a given student, and optionally create a new document for them.
- **Reports**: Any reports that you are able to run given your user role permissions.
- **Users and Settings**: These left menu items are visible only to administrative users.

- **Users**: Allows administrators to add, update and manage users.
- **Settings**: Allows administrators to manage district account settings.

My Students

- The "My Students" list contains students for whom at least one document is starred (and therefore is on your caseload).
- If you unstar all documents for a student, the student will be removed from your **My Students** list.
- This list provides a quick way to navigate between students and documents relevant to you at any given time.

Chat

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