samegoal

Share with Parents/Guardians

With the PLUS or PRO edition of SameGoal, documents can be shared with parents/guardians for remote viewing and electronic signature. Some examples of when this may be useful include:

- Obtaining faster parent signature turnaround on documents which do not require meetings (e.g. prior written notices, parent consent, etc).
- Sharing documents electronically during remotely held meetings (e.g. over telephone or video). All collaborative team edits are shown in real-time for parents to easily follow along.
- Capturing parent signatures electronically on all related documentation after a meeting has been held.

Share a document with a parent

Steps *To share a document with a parent:*

1. Visit the document you wish to share with a parent.
2. Click the **Share** tab in the top right.
3. Switch to the **Add Parent/Guardian** tab.
4. Select the guardian email from the drop down, or select **Enter Manually** and provide the required information:
    - **Email:** Parent/guardian email address
        - This is not intended for sharing documents with district staff. If the parent is also a district employee, do not provide their district email. Enter their personal email to ensure they retain access to the document even if they lose access to their district email.
    - **First name:** Parent/guardian first name
    - **Last name:** Parent/guardian last name
5. Select whether parent should have **Can View & Sign** or **Can View** access.
    - **Can View:** Grants the parent/guardian read-only access.

    - **Can View & Sign:** Allows them to view the document as well as edit any guardian-specific fields, such as consent questions or parent signature fields.
6. Optionally include a note for the parent/guardian.
7. Click the **Send** button.
    - Do not click **OK** on the **Update Collaborators** dialog until you've sent the parent/guardian email. You may need to scroll down to see the **Send** button.

An email containing a link to the document will be sent to the parent/guardian. The email will also include information about who shared the document with them, their level of access, and the note if one was included. The parent/guardian will now also appear on the **Collaborative Team**.

Tip This feature should only be used to share documents with parents/guardians for the purposes of viewing and signing. This should not be used to share documents with other district staff (such as a general education teacher), non-district staff (such as the student's doctor), or the student (even after they reach the age of majority).

Tip When a document is shared with a guardian, the guardian retains access to the document even after it is marked complete (they will have read-only access to completed documents). If a document is marked incomplete or amended, guardians will not have access to the new document draft until the document is re-shared. When a guardian does not have access to the most recent version of a document, there will be a note next to their name on the **Collaborative Team**.

Tip If a parent has unsubscribed from Document Event emails from SameGoal, you will not be able to electronically share documents with them. In this case, you will receive an error that says **Email cannot be delivered because the guardian has unsubscribed from 'Document Event' messages**. In order to share the document with the parent they will either need to resubscribe to the emails by finding an existing email from SameGoal, or you can share the document with them in a different way, such as printing or downloading.

Update parent permissions

Parent/guardian access can be updated at any time. This can be helpful if:

- You want to give a parent/guardian **Can View** access before a meeting and then allow them to sign the document once it's time for the meeting.
- You want to give a parent/guardian **Can View & Sign** access during a meeting and then revoke their edit access if the document isn't marked complete right away.
- You want to remove them from the collaborative team. Most often, parents/guardians are not removed from a document after signing. Instead, they retain read-only access to the document once it has been marked complete. However, it might be useful to remove them in some situations.

Steps *To update parent permissions:*

1. Visit the document.
2. Click the **Share** tab.
3. Find the parent/guardian in the **Collaborative Team**.
4. Change the permission dropdown as needed.
5. Click **Save**.

Re-share a document with a parent

Re-sharing a document will resend an email to the parent. This can be helpful if the parent is not able to find the email in their inbox or if their access was paused after marking a document incomplete or amending it.

Steps *To re-share a document with a parent:*

1. Visit the document.
2. Click the **Share** tab.
3. Find the parent/guardian in the **Collaborative Team**.
4. Update their permission if needed.
5. Check the **Re-share** checkbox.
6. Click **Save**.

A new email containing a link to the document will be sent to the parent in the same email chain, bumping the email to the top of their inbox.

Bulk share documents with a parent

Multiple documents for the same student or for siblings can be shared with a parent/guardian at once.

Steps *To bulk share documents with a parent:*

1. Navigate to a student's **Documents** tab or to a document list page to search for the documents.
    - If sharing documents for siblings from a document list page, use the Student ID filter to return only documents associated with the siblings.
2. Select all of the documents you wish to share.
3. Click **Share** > **Update Collaborators**.
4. Switch to the **Add Parent/Guardian** tab.
5. Enter relevant information.
6. Click **Send**.

One email containing links to each document will be sent to the parent/guardian.

Tip If a subset of the selected documents was previously shared with the parent/guardian, clicking **Re-share** will only share documents that were previously shared. You will need to go through the full share workflow to share documents that have not yet been shared.

Working with parents

SameGoal has many tools to help make it easier for district staff to work with parents/guardians:

- If a parent's preferred language is not English, you can translate documents before sharing them with the parent if your district is on the PRO edition of SameGoal.
- Document History tracks each time a document has been shared with a parent/guardian. Additionally, it will also indicate whether the document share email has been opened and if the parent/guardian has viewed or edited the document.
- When guardians have **Can View & Sign** access to a document, all guardian-editable fields will be highlighted when they are viewing a document. However, just because a field is highlighted doesn't mean they are required to fill it out. It might be helpful for district staff to provide guidance to the guardian about how to fill out the document.
- During a meeting, if a parent is following along on their device, each time you click into a field on the document, it will automatically scroll their screen to that point in the document to help them follow along.
- When a parent makes an edit to a document, the owner(s) of the document will receive a **Guardian Activity** notification.

Tip To learn more about how to navigate SameGoal as a parent/guardian, see the Parent/Guardian Guidance support page. This support page is linked to from the email sent to parents when a document is shared.