Share Documents Guardians

Documents may 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.

Parent perspective

When a document is shared with a parent:

- **The parent receives an email.** This email contains a link to the document shared with them. The newly added parent is also reflected as part of the **Collaborative Team** on the document **Share** tab.
  - NOTE: If a parent has not received the email, please advise them to check their Spam folder.
- **Parent permission.** Parents granted "Can View & Sign" access may view documents whether or not they are complete. However, only incomplete documents may be signed.
  - Parents see all fields as read-only, except those related to parent signature, even when a document is incomplete. Leaving a document incomplete after a meeting will not allow a parent to make non-parent signature related changes.
  - This editing model is intentionally consistent with how the application works for logged in educators, who can also only apply signatures while a document is incomplete.
- **Parent abilities.** Parents who have had a document shared with them are able to:
  - View the document.

- Edit/sign ONLY areas related to parent signature when a document is incomplete.
- See all edits in real-time by members of the collaborative team. As edits are made, the parent viewer screen automatically scrolls to the most recent field a staff member has clicked in, making it easy to follow allow during remote meetings.
- See all other collaborators currently viewing the document in the top right of the screen (the same as a logged in user).
- Chat with any collaborator currently viewing the document and signed into chat by clicking the collaborator "name card" in the top right.
- For more information about parent abilities, see Parent/Guardian Guidance - View and Sign Electronically. This support page is linked to from the email sent to parents when a document is shared.

💡 Tip When a parent makes an edit to a document, the owner(s) of the document will receive a **Guardian Activity** notification.

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. Click the **Share** tab.
2. Click the **Add Parent/Guardian** tab.
3. Select the guardian email from the drop down, or select **Enter Manually** and provide the required information:
   - **Email:** Parent/guardian email address
   - **First name:** Parent/guardian first name
   - **Last name:** Parent/guardian last name
   - **Permission:** Select whether parent should have **Can View & Sign** or **Can View** access
4. Click the **Send** button. The parent will be emailed document access and added to the **Collaborative Team**.

⚲ Tip When a document is shared with a guardian, the guardian retains access to the document until the document is marked complete. If a document is re-marked incomplete or amended, guardians do not have access to the new document draft until and unless the document is re-shared. The web interface of the **Share** tab also indicates when a guardian on the collaborative team does not have access to the most recent version of a document. To help guardians easily locate all versions of the document they have ever been granted access to, the email they receive includes links to ALL versions that have ever been shared with them.

Reshare a document with a parent

Resharing a document will resend an email to the parent.

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

1. Visit the document. Click the **Share** tab.
2. Find the guardian in the **Collaborative Team**. Update the guardian's permission if needed.
3. Check the **Re-share** checkbox and click **Save**. The parent will be re-emailed a link for document access.

Remove parent from a document

Most often, parents are not removed from a document after signing. Instead, they retain read-only access to the document once marked complete. However, in some situations it can be useful to remove a parent.

Steps *To remove a parent from a document:*

1. Visit the document. Click the **Share** tab.
2. Find the parent in the **Collaborative Team**. Change the permission dropdown to **Remove** and click the **Save** button.

Limit feature use to parents

This feature should **only be used to share documents with parents/guardians** for the purposes of viewing and signing. The following is not supported:

- Capturing electronic signatures from other district staff (e.g. general education teachers). These individuals should instead be added as regular users to SameGoal.
- Capturing parent input in fields unrelated to electronic signatures.
- Capturing input from non-district related individuals (e.g. student's doctor).