samegoal

User Guide

Learn the basics of SameGoal. This is the perfect place to start.

Training Resources

- General Training Video
- General Training Guide

Account Basics

- Log In
- Change Your Password
- Reset Your Password
- Link Your Accounts
- Add a Bookmark
- Create a Desktop Shortcut
- Screen Overview
- Notifications
- Log Out

Students

- Search Students
- Student Enrollment Status
- Program Participation
- Program Deadlines
- Pronouns & Gender

Document Creation

- Create a New Document
- Copy to a New Document
- Document Overview
- Document Prefill

Authoring Documents

- Editing Basics
- Rich Text Editing & Toolbar
- Field Tips & Guidance
- Bank Values
- Document Validation
- Autosave
- Attachments

Collaboration

- Share Documents
- Bulk Share
- Document Access Requests
- Collaborative Editing
- Chat
- Document History

Meetings & Signatures

- Holding Meetings
- Meeting Mode
- Electronic Signatures
- Topaz Signature Pads

Work with Parents

- Share Documents with Parents/Guardians
- Parent/Guardian Guidance
- Translation

Printing

- Preview/Print
- Additional Views
- Bulk Print
- Draft Watermark
- Print Document Versions

Document Lifecycle

- Mark Documents Complete
- Correct a Completed Document
- Create a Formal Amendment
- Delete/Undelete Documents

Acknowledgement of Receipt

- Acknowledge Receipt of a Document
- Update Acknowledgers
- View Acknowledgers
- Student Team

Document Management

- Document List Filters
- Bulk Actions
- Manage Your Caseload
- "My Students" List

Reports

- Reports
- Report Settings
- Navigating Reports
- Report Troubleshooting and FAQs