

User Guide

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

- [General Training Video](#)
- [General Training Guide](#)

Getting Started

- [Log in](#)
- [Change password](#)
- [Reset password](#)
- [Link your accounts](#)
- [Add a bookmark](#)
- [Create a desktop shortcut](#)
- [Screen overview](#)

Writing Documents

- Search students
- Student enrollment status
- Create a new document
- Copy to a new document
- Document overview
- Document prefill
- Field tips & guidance
- Autosave
- Rich text editing/toolbar
- Copy/paste
- Keyboard shortcuts
- Attachments

Printing

- Preview/print
- Alternate views
- Bulk printing
- Draft watermark

Collaboration

- Share documents
- Collaborative editing
- Chat
- Version history

Banked Values

- User banks
- District banks

Pronouns and Gender

- Pronouns and Gender

Compliance

- Document validation

Meetings & Signatures

- Holding meetings
- Meeting mode
- Topaz signature pads
- Electronic signatures
- Remote electronic parent signatures

Translation

- Translation

Progress Reports

- Progress reports
- Progress monitoring charts

Document Lifecycle

- Mark documents complete
- Correct a completed document
- Create a formal amendment
- Transfer documents
- Delete documents
- Undelete documents

Program Participation

- Program participation
- Program deadlines

Document Management

- Document list filters
- Bulk actions
- Bulk share
- Manage your caseload
- "My Students" list
- "All" list

Notifications

- Notifications

Reports

- Reports
- Report settings
- Navigating reports
- Report troubleshooting and FAQs

Log Out

- Log out