samegoal

User Guide

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

- General Training Video

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
- 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

Log Out

- Log out