samegoal

Amendments

Amend a document

If you need to make a significant change to a plan document, you may need to create a formal amendment.

Steps *Steps to make an amendment:*

1. While in the document, the document owner can click on the lock icon and select **Amend**.
2. At the bottom of the cover page, add a new Amendment section by clicking **add Amendment/Revision**.
3. Indicate whether or not a meeting is being held for the amendment.
4. Enter the date the amendment is taking place and provide the effective date.
5. List which sections are being updated and provide a summary of the changes being made.
6. Make the necessary changes in the document to reflect the amendment section.
    - If you are updating a student's SDI services, make sure to change the service dates as necessary.
    - Ex: If you are dropping a service, don't delete the existing service, but rather add a new SDI service section with updated information and change the end date in the existing SDI service section.
7. If a meeting was held to amend the document, add a new signatures section and have all meeting participants sign.
8. Once the necessary edits have been made, re-mark the document complete.
9. If the document was previously shared with the parent/guardian, they will retain access after a document has been completed, but once an amendment is created, their access will be outdated. You will need to re-share the document with them.

Incomplete a document

If you need to make a minor edit to a document that has already been completed, such as changing a date, you may reach out to an administrative user to mark your document incomplete. This will make it editable again, so you can update your document.