samegoal

Amendments

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

Make an Amendment/Revision

Steps *To amend a document:*

1. As the document owner, click on the lock icon and select **Amend**.
2. At the bottom of the cover page there is an **Amendments/Revisions** section. For every amendment that is made, add a new section by clicking **add Amendment/Revision**.
3. Specify whether or not there is a meeting for the amendment/revision.
4. Enter the date of the amendment/revision and the effective date.
5. Click **add Change**, specify which section(s) will be updated, and summarize the change(s) being made.
6. Make the necessary changes in the document.
7. If you do have a meeting, in Section 5, 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they will retain access after a document has been completed, but once an amendment is created, their access will be outdated.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.