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. 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**.
3. Enter the date of the revision.
4. Provide details about the participants involved in amending the document.
5. List which sections are being updated.
6. Make the necessary changes in the document to reflect the amendment section.
    - If you are updating a student's related 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 related service section with updated information and change the end date in the existing related 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they will retain access after a document has been completed, but once an amendment is created, their access will be outdated.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.