Making Amendments

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

In the past, you may have used the term "Brief" which is a similar process requiring other documentation. However, with an amendment, changes are all summarized directly within the document which makes it easier for parents/guardians and staff to understand and follow.

How to amend a document

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 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.
   - Typically there is not a meeting for an amendment unless the district requires one.
4. Enter the date of the amendment 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 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 you do have a meeting for the amendment, in Section 15, 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they will retain access after a document has been completed, but once an amendment is created, their access will be outdated.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.

Alternatives to making an amendment

Revise a document: If you are making a change to an IEP that changes the student's eligibility status, changes their placement, or is related to a manifestation determination, you would make a revision, which requires a meeting.

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.