samegoal

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they will retain access after a document has been completed, but once an amendment is created, their access will be outdated.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.

If you amend an IEP and select **Yes** for **Meeting**, there will be a deadline to amend the corresponding Funding Tool within 10 school days of the IEP amendment/revision.

Correction amendments

In reports, amending a document often creates a new record (or new line in the report). However, if you are attempting to fix a clerical error and you would like the existing information to be updated instead of creating a new record, you can do a correction amendment.

In a subset of reports, correction amendments will result in the existing record being updated. In order to document a correction amendment in a document, while amending the document, the effective dates will need to remain unchanged. If the effective dates remain the same, information in the amended version of the document will replace information in certain reports rather than creating a new record.

Tip Correction amendments must be done in order. If you amend the document and update the effective dates and then later attempt to do a correction amendment to the original version of the document, it will result in an error.

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.