

Copy To New Document

Copy to a new document


Creating a new document by copying from an existing document can be a great tool to help save time year to year. When copying to a new document, generally all fields will copy forward except for dates, signatures, and deliberations/meeting notes. (In some cases, depending on document type, there may be other select fields that don't copy forward.)

In order to copy to a new document:

- The existing document needs to be marked complete.
- You need to have permission to copy the document type.
 - Administrators control whether or not users can copy to a new document.
 - This can be controlled on a per form basis.

Steps *To copy to a new document:*

1. Visit **Caseload** or **All** to find the document(s) you want to copy from.
2. Check the document(s) you want to copy.
3. Click on the **Actions** menu button along the top and select **Copy to a new document**.
4. You will receive a pop-up giving you the option to share the new document(s) with the same people. If you wish to do so, click the checkbox.
5. Select **Copy Document** to continue.
6. You can also copy to a new document from within a completed form by clicking the lock icon and selecting **Copy to a new document**.

 **Tip** Do not use copying a document as a substitute for creating a formal amendment or correcting completed documents. Doing so can cause serious state reporting issues.