samegoal

# Formal Amendments

## Create a formal amendment

Documents that are marked complete become read-only. If a significant change needs to be made to the document, the document owner can create a formal amendment if the form type supports amendments (typically plan and evaluation documents).

**Steps** *To create a formal amendment:*

1. Navigate to the completed document you wish to amend.
2. Click the lock icon in the toolbar and select **Amend**.
3. You will receive a popup warning. Click **OK** if you wish to continue.
4. Depending on the specific form you are amending, the process for documenting the amendment may look a little different. Most forms will have an amendment table on the cover page where you can add a new row and summarize the changes to be made.
5. Update the remainder of document to reflect these changes (e.g. add services, remove accommodations, etc).
6. Add a signature section if a meeting was held for the amendment.
7. Re-mark this document complete.

Tip After a document has been amended, previous version of the document are still accessible via Document History and can be printed or downloaded at any time.

Tip If your district is on the PRO edition of SameGoal and uses the acknowledgment of receipt workflow, required acknowledgers will be prompted to review and sign off on the document each time it is marked complete.

Tip If a minor change needs to be made to a document in order to fix a clerical error, the document should be marked incomplete by an administrative user.