

## Mark Documents Complete

Once all information has been entered into a document and all necessary meetings (if any) have been completed, the document should be marked complete in the program.

Documents that are marked complete:

- Become read-only
- Can be amended by the owner or reset to incomplete by an administrative user
- Can be copied to create a new document
- May still have attachments added (e.g. signed signature pages)

Documents that are left incomplete:

- Are vulnerable to changes after parent meetings
- Prevent new documents of the same form type from being created
- Prevent goal/objective copy over to progress reports
- Are not included in calculations for program participation tracking, deadlines, or state reporting

Only the document **Owner** (or an administrative user) may complete a document. If you do not have access to complete a given document, a checkbox will not be visible next to the document. You can view who the **Owner** of the document is on the **Share** tab along the top.

### Mark a document complete

**Steps** *To mark a document complete:*

1. Visit **Caseload** or **All** to find the document(s) you wish to complete.
2. Check the document(s) you wish to complete.
3. Locate the **Actions** menu button along the top. Select **Complete** from the menu.
4. A lock icon will appear next to the document or documents that have been completed. This indicates the document is locked from editing (read-only).

5. You can also click on the lock icon within a document and select **Complete** to mark it complete.

## Editing completed documents

- If a minor correction needs to be made to a document after it has been marked complete, an administrative user can re-mark the document incomplete.
- If a significant change must be made to a plan document after it has been marked complete, a formal amendment must be made.