Add an Amendment to a Form

Last Modified on 08/05/2022 8:46 am EDT

About

Additional information can be added to a signed and sealed Form by adding a Pending Amendment. Below are the two ways to propose an amendment from within NextStep.

- Add an Amendment from a Form
- Add an Amendment from the Document Center

Pending Amendments can also be created by the client in the Document Center of the Client Portal.

Add an Amendment from a Form

1. Navigate to the Admissions or Clinical Forms Menu: **Main Menu > Admissions Menu or Clinical Forms Menu**
2. Select the appropriate Form Type.
3. Search for and select the client.
4. Scroll to the Sealed Forms section and click the Form name you want to open.
5. Below to the Amendments section, click the **Propose Amendment** button.

6. In the Add Amendment window, click in the **Source** field and type the source of the information.
7. Click in the **Amendment** field and type the details you want added to the Form.
8. *(Optional)* If you are an Administrator or set up with one of the Process Permissions of **Enable to Accept or Deny a proposed amendment to form or note (user caseload)** or **Enable to Accept or Deny a proposed amendment to form or note (all clients)**, an Accept Also checkbox will display. Click the checkbox to automatically accept the proposed amendment.
9. Click the **Propose** button to add the Amendment to the Form as a Pending Amendment.

Add an Amendment from the Document Center

1. Navigate to the Document Center: **Main Menu > Reports Menu > Document Center**
2. Search for and select the client.
3. Click the **Case #** radio button for which you want to add an Amendment.
4. Click the **Open Case** button.

5. *(Optional)* Click the Section name to expand the section to display the available Forms.
6. Select the **radio button** for the signed and sealed Form you want to add an Amendment.
7. Click the **Open Form** button.
8. Below the Amendments section, click the **Propose Amendment** button.

9. In the Add Amendment window, click in the **Source** field and type the source of the information.
10. Click in the **Amendment** field and type the details you want added to the Form.
11. *(Optional)* If you are an Administrator or set up with one of the Process Permissions of **Enable to Accept or Deny a proposed amendment to form or note (user caseload)** or **Enable to Accept or Deny a proposed amendment to form or note (all clients)**, an Accept Also checkbox will display. Click the checkbox to automatically accept the proposed amendment.
12. Click the **Propose** button to add the Amendment to the Form as a Pending Amendment.