Accept or Deny Pending Amendments for a Form

Last Modified on 08/04/2022 4:23 pm EDT

About

There are two Process Permissions that grant users access to accept or deny pending amendments. Users who have the permission, **Enable to Accept or Deny a proposed amendment to form or note (user caseload)** will be able to accept and deny Pending Amendments on Forms for their case load. Users who have the permission, **Enable to Accept or Deny a proposed amendment to form or note (all clients)**, will be able to accept and deny Pending Amendments on Forms created by any user for any client. Pending Amendments can be accepted or denied from a Form, the Document Center, or Reminders List and can then be viewed from the Form or Document Center.
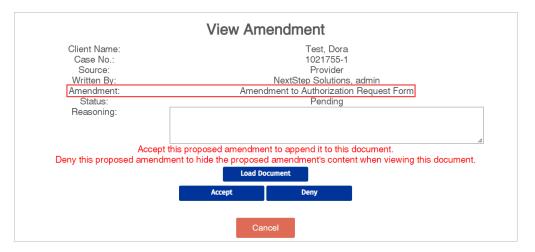
- Accept or Deny a Pending Amendment from a Form
- Accept or Deny Pending Amendment from Document Center
- Accept or Deny Pending Amendment from Reminders List
- View Accepted or Denied Amendments

Accept or Deny a Pending Amendment from a Form

1. Navigate to a Form: **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. In the Amendments section, locate the Amendment with a Pending status.
6. Click the **Show** link in the Content column to open the Pending Amendment.

AMENDMENTS					
Date	**Status**	**Source**	**Content**	**Written By**	**Decided By**
7/11/2022 09:48:29 AM	Pending	Provider	Show	NextStep Solutions	

7. In the View Amendment window, review the details. The information displayed for the Amendment will be the information attached to the Form.

View Amendment

Client Name: Test, Dora
Case No.: 1021755-1
Source: Provider
Written By: NextStep Solutions, admin
Amendment: Amendment to Authorization Request Form
Status: Pending
Reasoning:

Accept this proposed amendment to append it to this document.
Deny this proposed amendment to hide the proposed amendment's content when viewing this document.

Load Document

Accept   Deny

Cancel

8. *(Optional)* In the **Reasoning** field, enter your explanation for your approval or denial of the Pending Amendment.
9. *(Optional)* Click the **Load Document** button to view the Form.
10. Click one of the following options:

- **Accept**: Accept the Proposed Amendment. The status displays as Accepted.
- **Deny**: Deny the Proposed Amendment. The status displays as Denied.
- **Cancel**: Cancel out of the Amendment window without accepting or denying the request.

Accept or Deny Pending Amendment from 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, if not already selected.
4. Click the **Open Case** button.

DOCUMENT CENTER

BEGIN ENTERING LAST NAME AND CLICK ON CLIENT TO SELECT:

Test, Dora   **+**

SEARCH BY BIRTHDATE FORMAT: ● MM/DD/YY ○ MM/DD/YYYY

LIST ● ACTIVE CLIENTS ○ ALL CLIENTS

Click here for Printing instructions

Programs:	Primary Care	Location:	Universal - Yale
Gender:	Female	Date of Birth:	6/8/1978
Case No.:	1021755-1	Admit Date:	05/16/2022
Primary Clinician:	NextStep Solutions	Number of Days Allowed in Bed:	
ALLERGIES:	Hay	Diagnosis:	
SSN:		Last Tracked Acitity Code Billed:	N/A

CASE #:	CASE STATUS:
● 1021755-1	Accepted, Admission Date: 5/16/2022

Client: Test, Dora | Date of Birth: 6/8/1978

Face Sheet	Open Case	Main Menu	Font Size

5. *(Optional)* Click the Section name to expand the heading section which displays the available Forms.
6. Click the **radio button** for the signed and sealed Form for which you want to view the Amendment.

∧	Misc	
○	*Outpatient Review Form	Started on 7/11/2022, Sealed on 7/11/2022, Date of Service 7/11/2022
●	Authorization Request Form	Started on 7/11/2022, Sealed on 7/11/2022

7. Click the **Open Form** button.
8. Click the **Show** link in the Content column to open the Pending Amendment.

AMENDMENTS

Date	Status	Source	Content	Written By	Decided By
7/11/2022 09:48:29 AM	Pending	Provider	Show	NextStep Solutions	

9. In the View Amendment window, review the details. The information displayed for the Amendment will be the information attached to the Form.

View Amendment

Client Name:	Test, Dora
Case No.:	1021755-1
Source:	Provider
Written By:	NextStep Solutions, admin
Amendment:	Amendment to Authorization Request Form
Status:	Pending
Reasoning:	

Accept this proposed amendment to append it to this document.
Deny this proposed amendment to hide the proposed amendment's content when viewing this document.

Load Document

Accept   **Deny**

Cancel

10. *(Optional)* In the **Reasoning** field, enter your explanation for your approval or denial of the Pending Amendment.
11. *(Optional)* Click the **Load Document** button to view the Form.
12. Click one of the following options:

- **Accept**: Accept the Proposed Amendment. The status displays as Accepted.
- **Deny**: Deny the Proposed Amendment. The status displays as Denied.
- **Cancel**: Cancel out of the Amendment window without accepting or denying the request.

Accept or Deny Pending Amendment from Reminders List

1. Navigate to the Reminders List: **Navigation Menu > Reminders**.
2. Scroll to the **Pending Amendments for your Case Load** section.
3. Click the **Client's Name** in the Client column to open the pending amendment.
4. In the Amendment window, review the details. The information displayed for the Content will be the information attached to the Form.

AMENDMENT

Client Name:	Test, Dora
Case No.:	1021755-1
Source:	Provider
Written By:	NextStep Solutions
Content:	Amendment to Outpatient Review Form
Status:	Pending
Reasoning:	

Accept this proposed amendment to append it to this document.
Deny this proposed amendment to hide the proposed amendment's content when viewing this document.

Load Document

Accept   **Deny**   **Return to Main Menu**

5. *(Optional)* In the **Reasoning** field, enter your explanation for your approval or denial of the Pending Amendment.
6. *(Optional)* Click the **Load Document** button to view the Form.
7. Click one of the following options:

- **Accept**: Accept the Proposed Amendment. The status displays as Accepted.
- **Deny**: Deny the Proposed Amendment. The status displays as Denied.
- **Return to Main Menu**: Cancel out of the Amendment window, and return to Main Menu, without approving or denying the request.

View Accepted or Denied Amendments

1. Navigate to view the accepted or denied Amendments from:

   - **Main Menu > Admissions Menu or Clinical Forms Menu > Forms Button**
   - **Main Menu > Reports Menu > Document Center**

2. Search for and select the client.
3. Navigate to the Amendments section of the Document or Form to view all accepted or denied Amendments.

   - **Denied Amendment**: Click the **Show** link in the Content column to view the denied Amendment information.
   - **Accepted Amendment**: The Amendment text is displayed in the Content column.

AMENDMENTS

Date	Status	Source	Content	Written By	Decided By
7/11/2022 10:26:36 AM	Denied	Client	Show	NextStep Solutions	NextStep Solutions
7/11/2022 10:15:08 AM	Accepted	Provider	Amendment to Authorization Request Form	NextStep Solutions	NextStep Solutions