Accept or Deny Pending Amendments for a Note

Last Modified on 08/04/2022 11:58 am 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 Note, the Document Center, or the Reminders List and can then be viewed from the Note or Document Center.

- Accept or Deny a Pending Amendment for a Note
- Accept or Deny a Pending Amendment from the Document Center
- Accept or Deny Pending Amendments from the Reminders List
- View Accepted or Denied Amendments
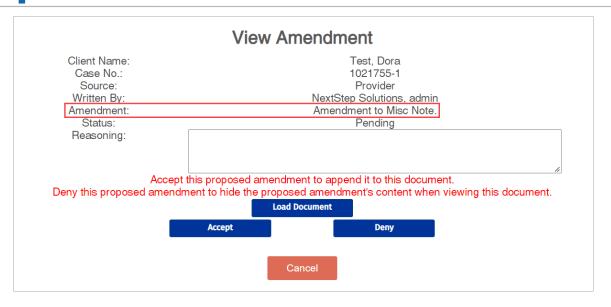
Accept or Deny a Pending Amendment for a Note

1. Navigate to the Progress Notes Menu:**Main Menu > Progress Notes Menu**
2. Select the appropriate Note Type.
3. Search for and select the client.
4. Scroll to the Search Notes section and set the filters.
5. Click the **Show Notes** button. Notes that meet the filters you set are displayed.
6. Locate the Note with the Amendment.
7. In the Amendments section, locate the Amendment(s) with a Pending status.
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 01:29:32 PM	Pending	Provider	Show		NextStep Solutions	

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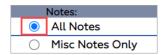
View Amendment

Client Name:	Test, Dora
Case No.:	1021755-1
Source:	Provider
Written By:	NextStep Solutions, admin
Amendment:	Amendment to Misc Note.
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 Note.
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 a Pending 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. Select the **Case #** radio button and click **Open Case**.
4. Scroll to the Notes section and click the **radio button** for the Notes you want to be displayed.

5. Click the **Open Form** button.
6. Set the filters to search for the Note and click **Show Notes**.
7. Locate the Note for which you want to accept or deny the Proposed Amendment.
8. Scroll to the Amendments section, and click the **Show** link in the Content column for the Pending Amendment.

Amendments					
Date	**Status**	**Source**	**Content**	**Written By**	**Decided By**
7/11/2022 01:29:32 PM	Pending	Provider	Show	NextStep Solutions	

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

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 Note.
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 Amendments from the 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 of the Proposed Amendment. The information displayed for the Content will be the information attached to the Note.

5. *(Optional)* In the **Reasoning** field, enter an explanation for your approval or denial of the Pending Amendment.
6. *(Optional)* Click the **Load Document** button to view the Note.
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

Navigate to either the Note or the Document Center, and scroll down to the Amendments section 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 02:24:21 PM	Denied	Client	Show		NextStep Solutions	NextStep Solutions
7/11/2022 02:23:51 PM	Accepted	Provider	Amendment to Misc Note.		NextStep Solutions	NextStep Solutions