Add an Amendment to a Note

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About

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

- Add an Amendment from the Note
- 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 the 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 for which you want to add an Amendment and click the **Propose Amendment** button.

7. In the Add Amendment window, click in the **Source** field and type the source of the information.
8. Click in the **Amendment** field and type the details you want to be added to the Note.
9. *(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.
10. Click the **Propose** button to add the Amendment to the Note 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. Select the **Case #** radio button for which you want to add an Amendment.
4. Click the **Open Case** button.
5. Scroll to the Notes section and select the **radio button** for the Notes you want to be displayed.

6. Click the **Open Form** button.
7. Set the filters to search for the Note and click **Show Notes**.
8. Locate the Note for which you want to add an Amendment and 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 note.
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 Note as a Pending Amendment.