

## Amendments to Signed Documents

If an error is found in a document already signed, use the *Amend* link to correct it. Amendments are made by the author of the document or that staff member's supervisor. The process used for making amendments is to request a change, make the correction, then sign the amended document. The *Amend* link is available in document lists, for example, the Progress Note list (click *Progress Notes* in the main menu, then *View Progress Notes*, search for a consumer).

### Request and Make Amendments

- Click the *Amend* link to the right of the consumer record you wish to correct to go to the Amendment Request form.

Note Date	Consumer	Type	Note	Signature Required By	Status	<a href="#">Add Progress Note</a>
04/09/2005	JESSE C. CLIENT	Individual	test	Jackie Sproat	Signed	<a href="#">View</a> <a href="#">Amend</a> <a href="#">Print Progress Notes</a>

- Form to be Amended Identifiers—will auto-fill form name, date record originally created, and current user name. Change if not accurate.
- Requested Change—enter the correction, this text will be visible in a text box at the top of the amended document.
- Amendment Performed By—will auto-fill with current user name.
- Date—will auto-fill with today's date.
- Click **SAVE** to save the request, Encompass will take you to the document. Now you can make the amendment(s).
- After changing the document, click **Save and go to Amendment Queue** to save changes and go to the approve amendment requests list. Click **Save** to save changes and go back to the list, you must use the instructions in the “Approve Amendment Requests” section below to sign the amended document. Click **Cancel** to cancel making a change at this time.
- Click the **Complete Request** link to the right of the amendment you want to finalize.
- Enter your password and click **Sign**.

You're now finished making and signing the amendment.

When an amendment is made to a form that's signed and counter signed, Encompass will ensure that both parties are informed when either makes an amendment. For example, if

the signer amends a record, Encompass will notify the counter signer via email that the record was amended. The counter signer should review the form and sign it if in agreement with the amendment, or if not, then re-amend the form. An email is sent to the supervisor notifying them of the change (if built into that agencies system.)

### ***Approve Amendment Requests***

- Click ***Approve Amendment Requests***.
- Use the ***Amend Form*** link to make the change to the document if you haven't already done so, or to double check that the document is correct before you finalize the change.
  - Click "Save" after making any changes.
- Click the ***Complete Request*** link to the right of the amendment you want to finalize.
- Enter your password and click ***Sign***.