# Changing the Author of a Document Tip Sheet

Most forms in SmartCare do not allow you to change the author. If the form includes documentation (an assessment or progress note) it will not allow you to switch the author. However, there are some documents where you can change the author (state reporting forms or the TADT). This tip sheet will walk you through how to make changes to the author so multiple people can work within the form. This tip sheet may change as training is updated. Please view our webpage for the most up to date version. If any additional help is needed, please contact us at bhs-ehrsupport@saccounty.gov.

What do I need to change the author on a form?

If admin staff start a state reporting document or TADT for a client, the clinician may be the one to finalize that form when they are working with the client. To have multiple people work on a single form, the author of that form will need to be changed once the form is ready to complete and sign. These steps are only necessary if the document was started by someone other than the person finalizing. These steps also will only need to be completed once the document is signed, they are not necessary for saving in-between.

Steps to change the author

1. The first user will complete their portion of the screen and then click *Save*.
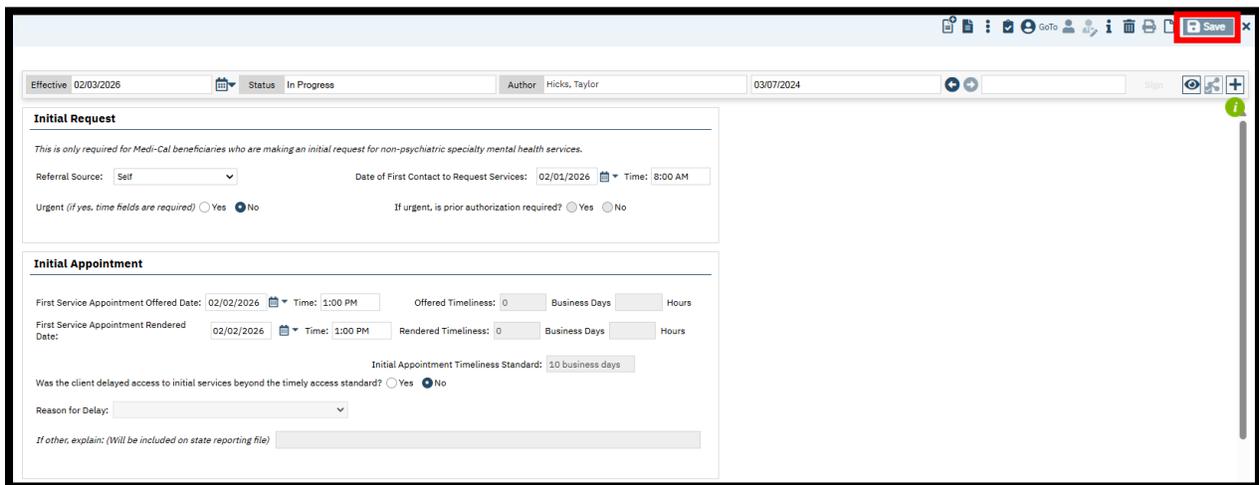
2. Once the record has been saved the status will switch to In Progress. The first user can close out the screen.

3. Once ready, with the client selected the second user can search for the appropriate screen. It will show as a PDF document. Click the Edit button to open and update the screen.
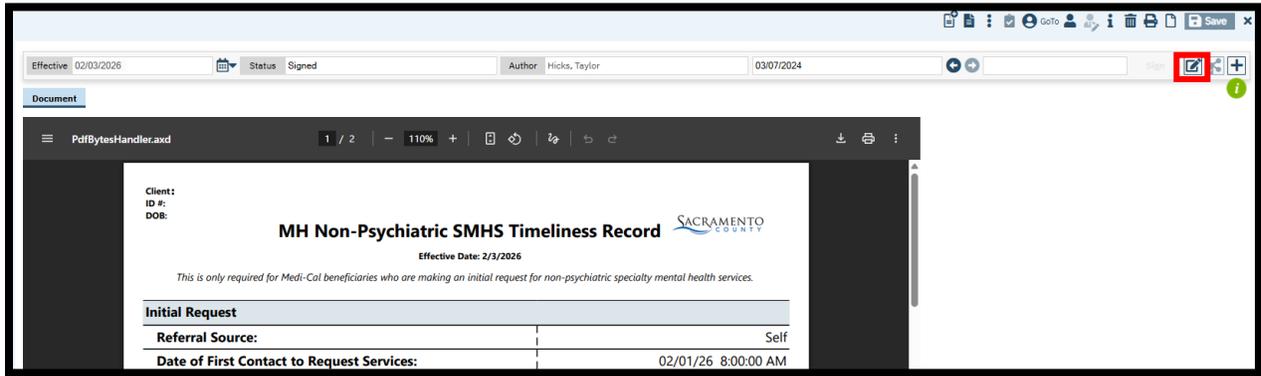
4. A confirmation Message pop-up will populate stating *A new version of this document is about to be created. Do you wish to continue?* Click OK
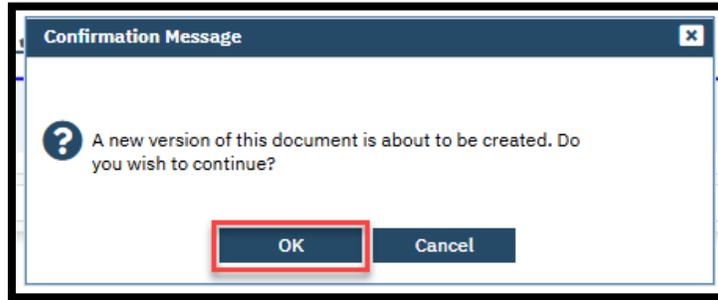
5. Make any necessary updates, then click *Save*.
6. Once the screen has been saved, click on the *Author* drop-down. Begin typing your name and It will automatically populate results, chose your name from the dropdown.
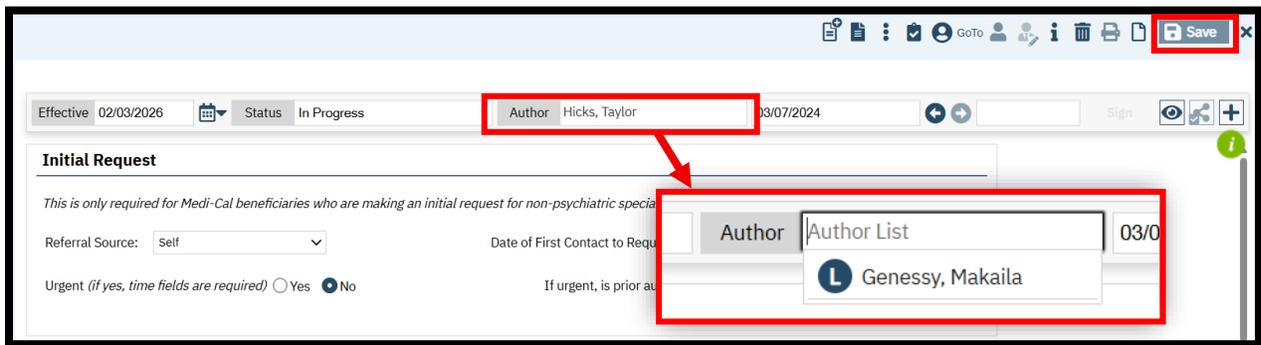
7. Once you've selected your own name the *Sign* button will become enabled. Click Sign once the document is complete.