

Co-Signature Tip Sheet

This Tip Sheet will walk users through adding a co-signer to a Service Note or Assessment and how to find, approve and/or decline Service Notes or Assessments sent to you for co-signature. This process may eventually change as the system is updated. Please visit [the EHR website](#) for the most updated version. If any additional help is needed, you can contact us at bhs-ehrsupport@saccounty.gov.

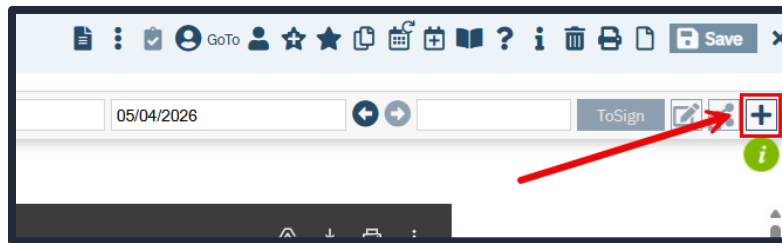
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How to Add a Co-Signer to a Document

To manually add a co-signer to a document, follow the steps below. Staff can find more information on [How to Add a Co-Signer to a Document](#) on CalMHSA's site.

1. **Navigate to the document** you want to add a co-signer for.
2. When you open the document, you should see the pdf viewer. **Click on the More Details Button** (Plus icon) in the Document Ribbon to expand the Document Ribbon.
 - a. The document ***must*** be signed by the author to add co-signers. If the document is not signed, nothing will display in the signer drop down list.



3. **Click on the dropdown under Signer and select the co-signer from the list.**
 - a. In the co-signer box, start typing in the name of the person you are trying to add, starting with their last name. Once the co-signer's name is selected it will appear in the display box to the right.

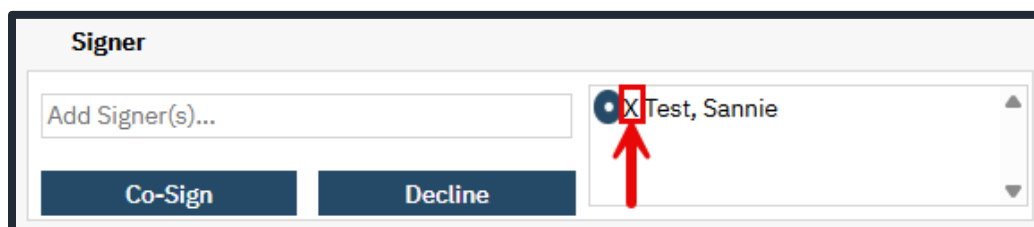


4. The co-signer can then [locate](#) and [approve](#) or [decline](#) the note.

How to Remove a Co-Signer

Follow the steps below to remove an unwanted co-signer from a document.

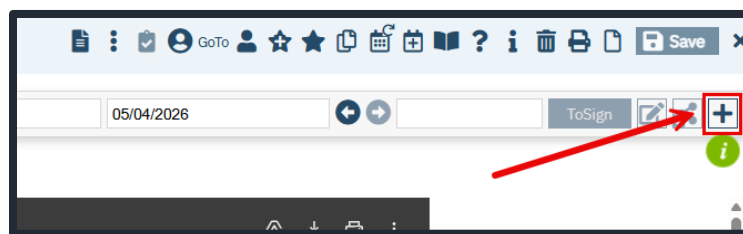
1. **Navigate to the Document** you need to remove the Co-Signer from
2. **Click the More Details Button** (plus sign icon) to expand the document ribbon.
3. In the signer box, select the X next to the co-signers name to remove them.



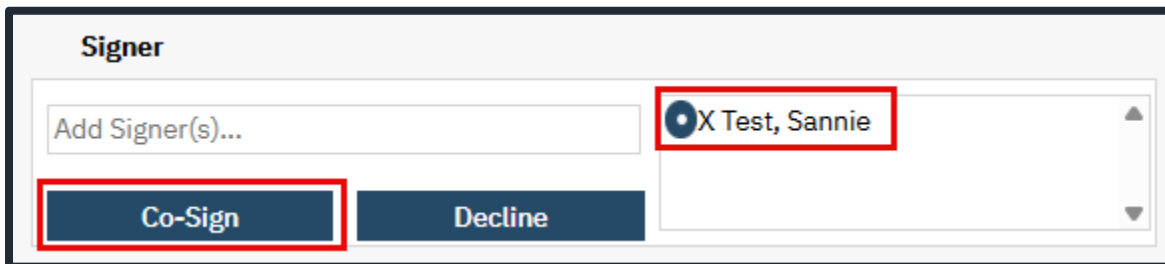
How a Client Co-Signs a Document

Some SmartCare forms require an electronic client signature, for example, the ASCMI Form. Once the document is signed by the author, follow the steps below to add the client as a co-signer to obtain their electronic signature. There are additional resources on CalMHSA's site located here; [How to Have a Client or Guardian Co-Sign a Document](#).

1. **Navigate to the document** you want to add a co-signer for.
2. When you open the document, you should see the pdf viewer. **Click on the More Details Button** (Plus icon) in the Document Ribbon to expand the Document Ribbon.
 - a. The document ***must*** be signed by the author to add co-signers. If the document is not signed nothing will display in the signer drop down list.

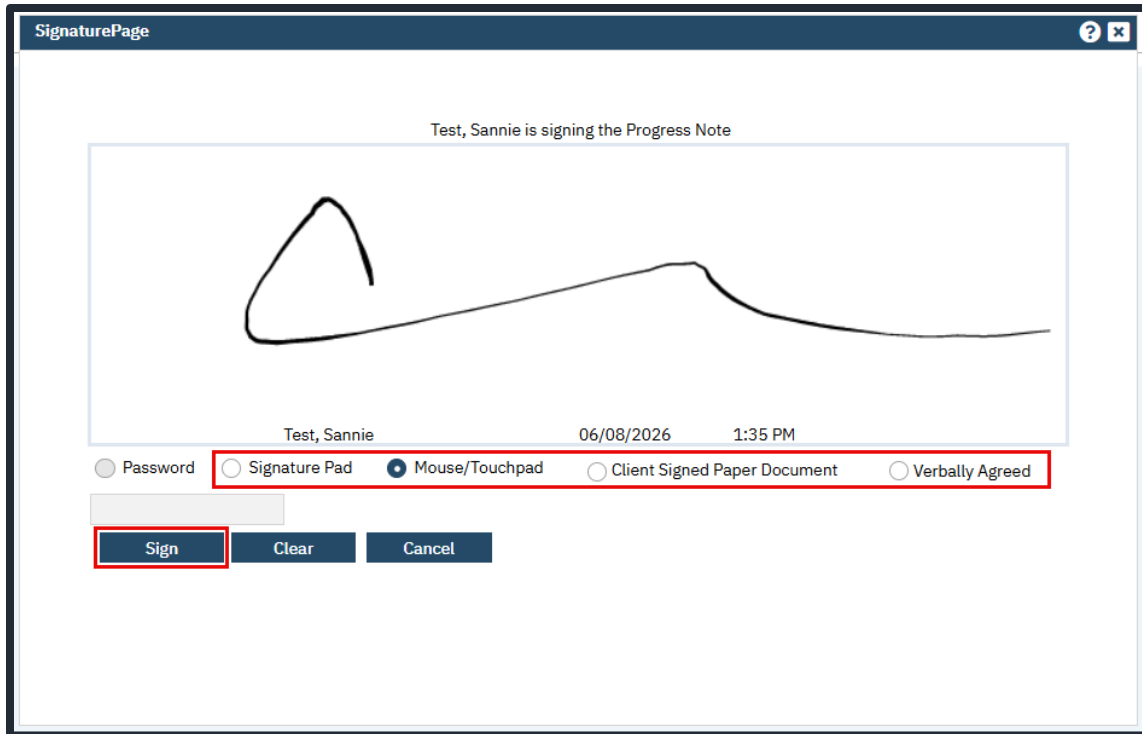


3. **Click on the dropdown under Signer and select the client from the list.** Once the client's name is selected it will appear in the display box to the right.
4. **Click the radio button** next to the client's name, and then **click Co-Sign**



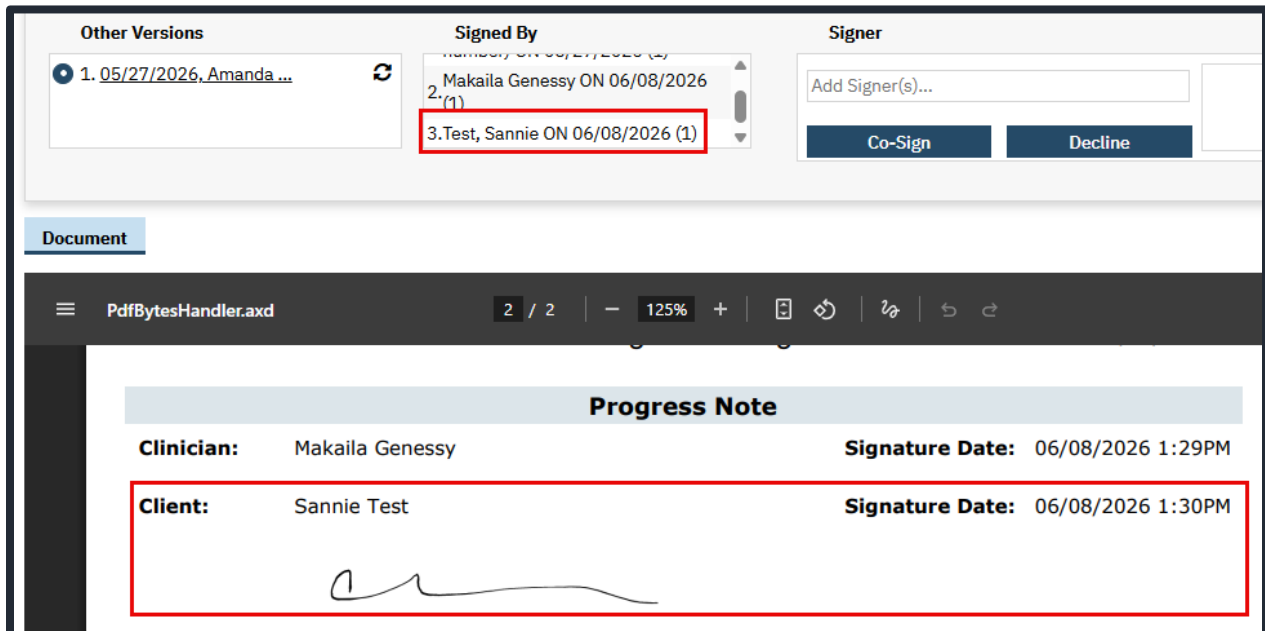
5. From the *Signature Page* popup, you will need to **select a radio button for how the client is going to co-sign**.
 - a. Signature Pad: an external device that's used to capture signatures
 - b. Mouse/Touchpad: use the mouse or touchpad to capture a signature.
 - c. Client Signed Paper Document: use to document that the client/guardian signed a paper version of this document. Staff can find information on how to record that a [Client Signed Paper Documents](#) on CalMHSA's site.
 - d. Verbally Agreed Over Phone: use to document that the client/guardian agreed to this document but did not sign a version of this document. Note that some legal documents require a signature and therefore should not use this option.

6. Click the Sign button.



7. Once Signed

- a. The signed by window will reflect that the document was signed by the client.
- b. The PDF will generate a signature page with the client's name, electronic signature (if applicable), and signature date.



How To Find Documents That Need Co-Signature

Approvers will not be notified in SmartCare when they receive a document to co-sign. It is recommended that your agency create an approval notification process.

Assigned Document(s) Widget

The Assigned Document(s) Widget can be added to a direct care staff’s dashboard to find documents needing co-signature under the *Co-Sign* hyperlink. Staff can find step-by-step instructions on [How to add a Widget to your Dashboard](#) on CalMHSA’s site.

	Notes	ISP	Assessment	ALL
Due Now	0	0	0	0
In Progress	2	0	0	3
Due in 14	0	0	0	0
Co-Sign	1	0	0	1
To-Sign	0	0	0	0
Assigned	0	0	0	0

My Documents (My Office)

The My Documents (My Office) list page shows all documents associated with you, the *staff to sign* column will advise if your signature is needed. Staff can find more information on the [My Documents \(My Office\) List Page](#) on CalMHSA’s site.

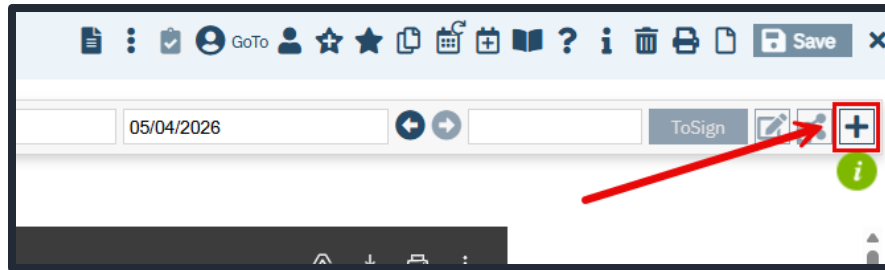
Client	Document/Description	Group Name	Effective	Status	Ver.	Due Date	Staff to Sign	Author	Others to Sign	Associated Documents	Program
Test, Oscar (800464903)	Diagnosis Document		06/01/2026	Signed	2		Genessy, Makai	Chhoeung, S...		Add	APCC-TWC-14th Ave
Test, Sannie (800464848)	Progress Note / Client Non B...		05/27/2026	Signed	1		Genessy, Makai	Traper, Ama...		Add	APCC-TWC-14th Ave
Test, Sophie (800464901)	Mobile Crisis Dispatch Scree...		05/27/2026	In Progress	1			Genessy, Ma...		Add	SacCo-CWRT-Dispatch...
Test, Lulu (800464853)	Progress Note / Assessment L...		05/21/2026	Signed	2		Genessy, Makai	Chhoeung, S...		Add	APCC-TWC-14th Ave
Test, Amber (800464858)	Progress Note / CFT/MDT Meet...		05/16/2026	In Progress	1			Genessy, Ma...		Add	APCC-TWC-14th Ave

How To Co-Sign Documents

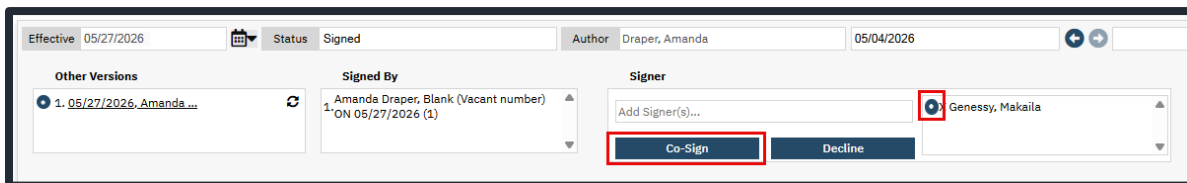
The sections below walk you step-by-step on how to co-sign documents that are approved and documents that are denied. We also have steps on how to co-sign in a batch. Staff can find more information on [How to Co-Sign a Document](#) on CalMHSA’s website.

How To Co-Sign (Approve)

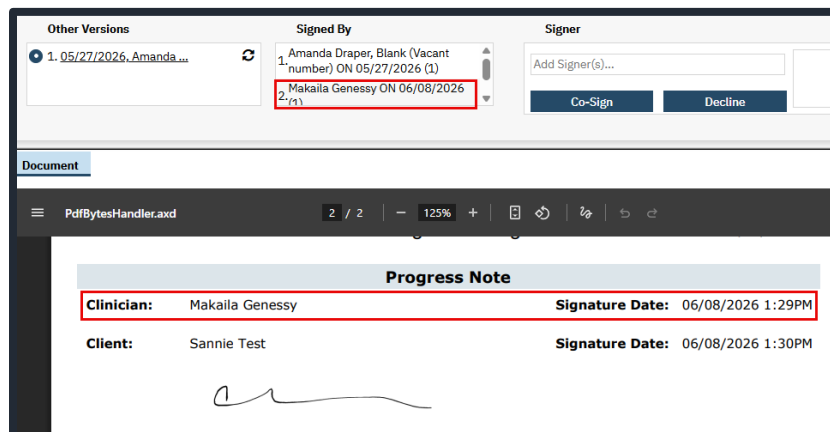
1. **Locate the document** needing your co-signature
2. **Open that Document**
3. **Click on the More Details Button** (Plus icon) in the Document Ribbon to expand the Document Ribbon. Locate the co-signer portion.



4. **Select the radio button** next to your name
5. Then **click Co-Sign** to approve.

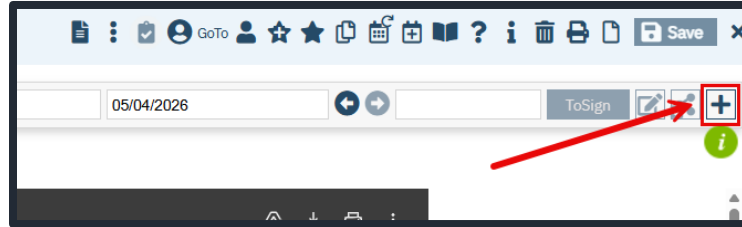


6. Once **approved**
 - a. The signed by window will reflect that the document was signed by the co-signer.
 - b. The PDF will generate a new page with the cosigner’s name, classification, and signature date.

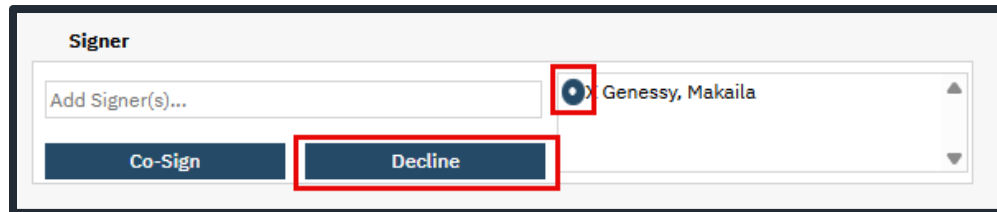


How To Co-Sign (Deny)

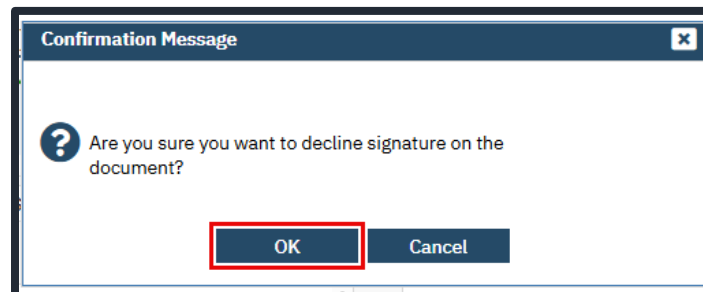
1. **Locate the document** needing your co-signature
2. **Open that Document**
3. **Click on the More Details Button** (Plus icon) in the Document Ribbon to expand the Document Ribbon. Locate the co-signer portion.



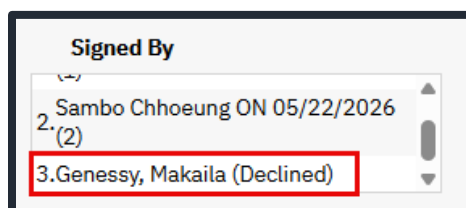
4. **Select the radio button** next to your name
5. Then **click Decline** to reject.



6. You will receive a pop-up asking *Are you sure you want to decline signature on the document?* **Click OK.**



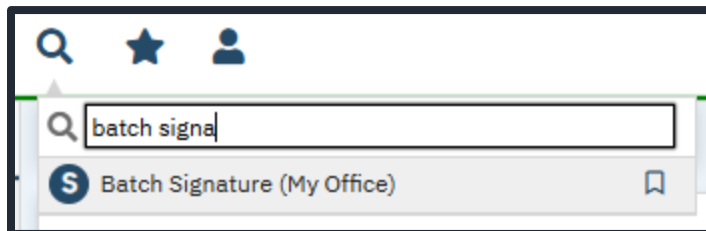
7. If the Note is declined, **the co-signer will need to notify the author** to make updates to the original note. Please check with agency for policy.
8. The Signed *By* box will state that the co-signer declined (rejected) the document.
 - a. The Author can click the Edit button to create a new version of the original progress note/assessment.
 - b. Once the document is ready to resubmit, the author will follow the process to add a co-signer as normal.



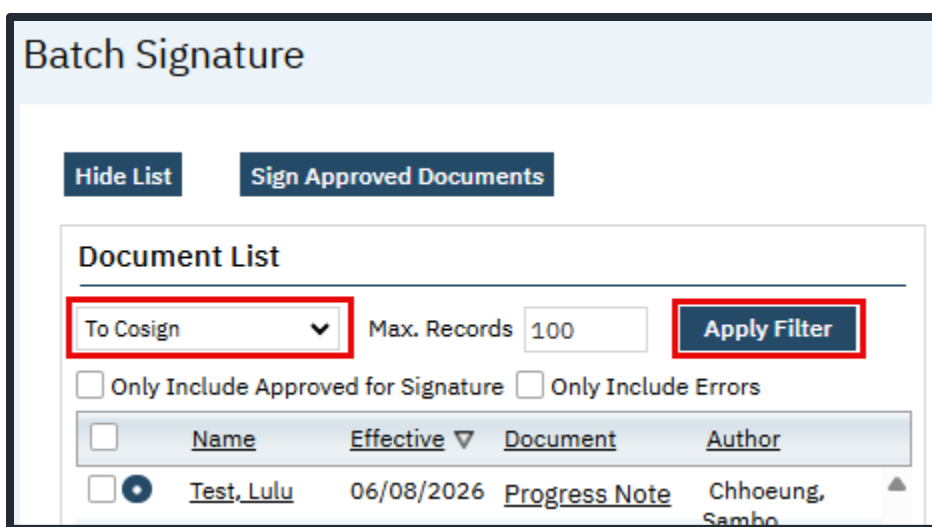
How to Sign Documents in a Batch

Documents can be co-signed individually or in a batch.

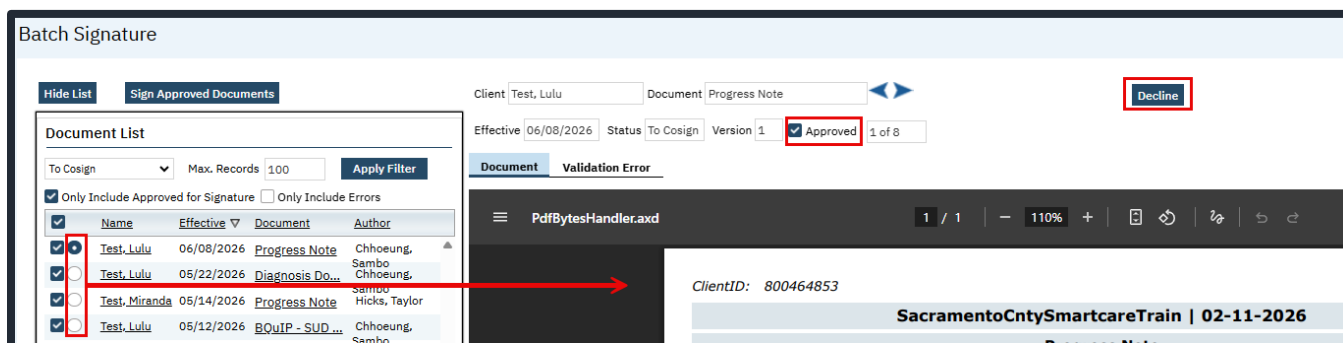
1. Type **Batch Signature (My Office)** in the search bar and navigate to the page.



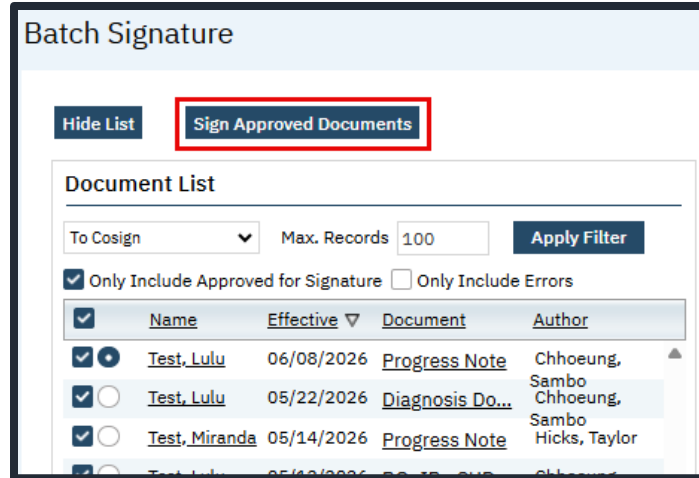
2. **Change the filter to Cosign** and **Click apply filter**
 - a. The document list will show you which documents need to be co-signed.



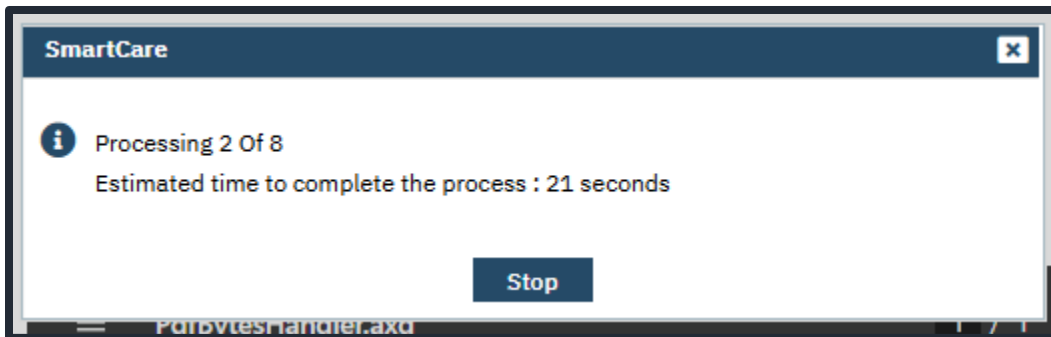
3. **Review documents** as needed. The document you have selected in the document list will show in the document viewer section.
 - a. After reviewing the document, **check "Approved"** at the top of the document viewer. This will mark the document approved for signature.
 - b. After reviewing the document, **check "Decline"** at the top of the document viewer. This will mark the document declined.



- Once you're ready to sign your batch, click **Sign Approved Documents**.



- This will initiate the batch signature process. There will be a pop-up with the status of the process. If you need to interrupt the process, click Stop.



- When completed, there will be a pop-up indicating the signature process has been completed. **Click Close**. You are finished and can now navigate away from this screen.

