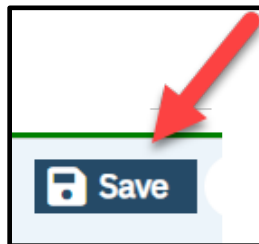


### Co-Signer Tip Sheet

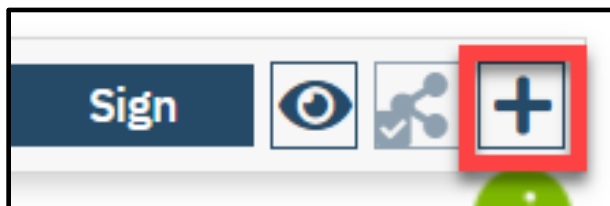
This Tip Sheet will walk users through how to cosign a Service/ Progress Note or Assessment. Also, this tip sheet will show approvers how to approve and decline Services/Progress Notes or Assessments. This process may eventually change as the system is updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx> for the most updated version. If any additional help is needed you can contact us at [bhs-ehrsupport@saccounty.gov](mailto:bhs-ehrsupport@saccounty.gov).

This tip sheet is for users who need approval to finalize a Service/ Progress Note or Assessment. SmartCare will allow the user to send the Note/ Assessment to their approver, however the approver will not receive a notification when the Note/Assessment is added to their My Documents list. It is recommended that each program create an approval notification process.

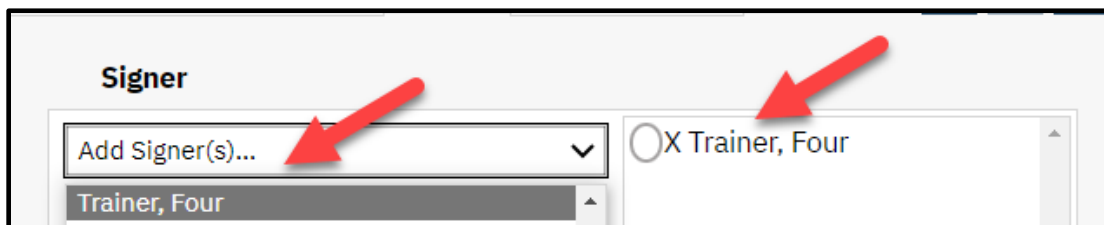
- 1. Complete a service note or assessment for your client.
- 2. **Save:** You will need to save your work before selecting a co-signer.
  - a. If the document is not saved nothing will display in the signer drop down list.



- 3. **Plus Icon:** Click on the “Plus Icon” to add a co-signer.



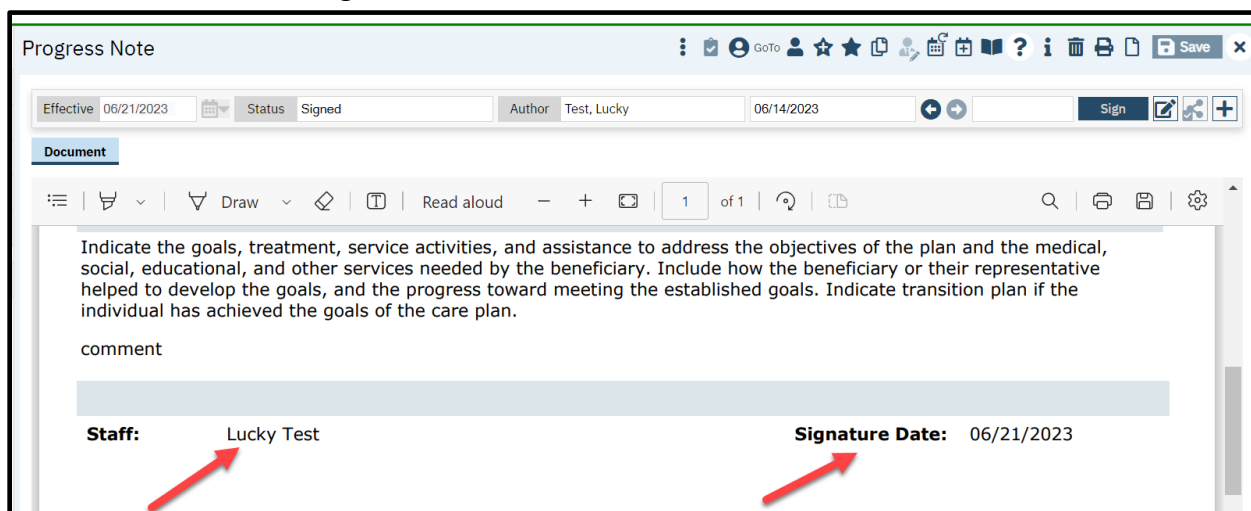
- 4. **Select the Signer:** Use the drop down to select the Co-Signers name, once selected it will appear in the display box to the right.
  - a. If you select the wrong person in error, click the X to remove the name.



- 5. Sign the Note:** Once you have chosen your co-signer, then you can sign the note as the author.



- 6. PDF:** Once signed by the author, a PDF will be generated. It will show your name and the date the document was signed.

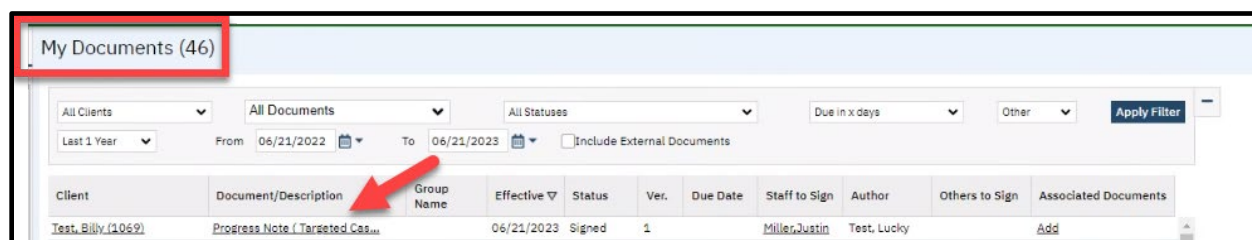


## Receiving a Document to Sign

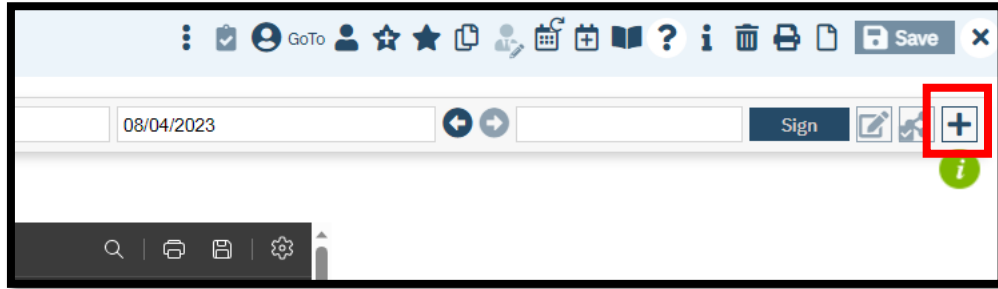
Approvers can check their My Document screen for items sent to them by staff to be signed. Friendly reminder: Approvers will not be notified when they receive a document to sign. It is recommended that your agency create an approval notification process.

Sign Document Process:

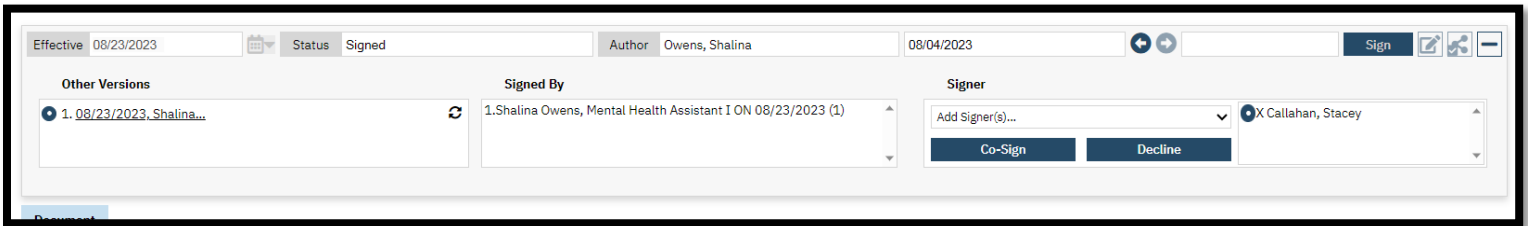
- 1. My Documents:** In the search field search “My Documents (My Office)”
- 2. Select Document/Description:** Select the document you would like to review, by clicking on the “Document/Description” hyperlink.
  - a. Note:** If you are unable to find an item, adjust the filters and click “Apply Filter”.



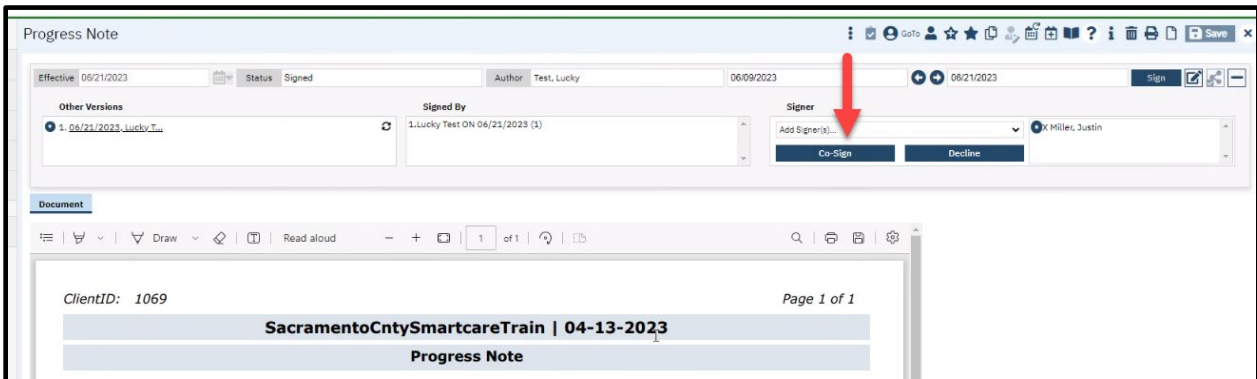
- 3. **Select “More Details” button:** Click on the “More Details” button to pull up the co-signer portion.



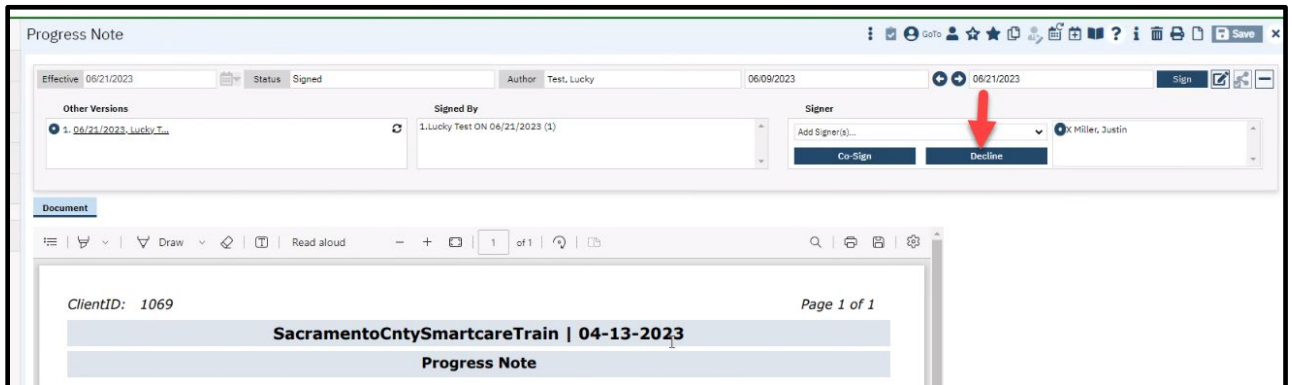
- 4. Select your name and either click **Co-Sign** to approve or **Decline** to reject.



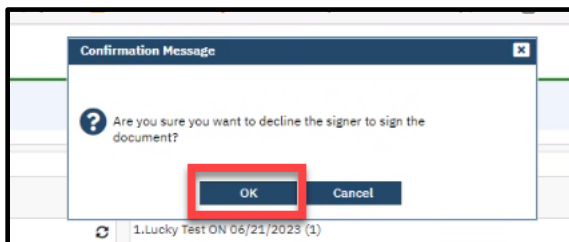
- 5. Once **approved** the Note/Assessment will generate a new page with the cosigner’s name, classification, and date.



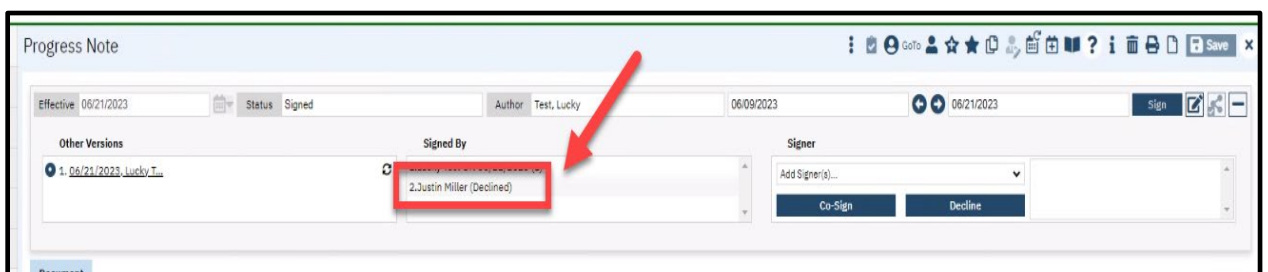
- If the Note is **declined**, the approver will need to notify the author to make updates to the original note.



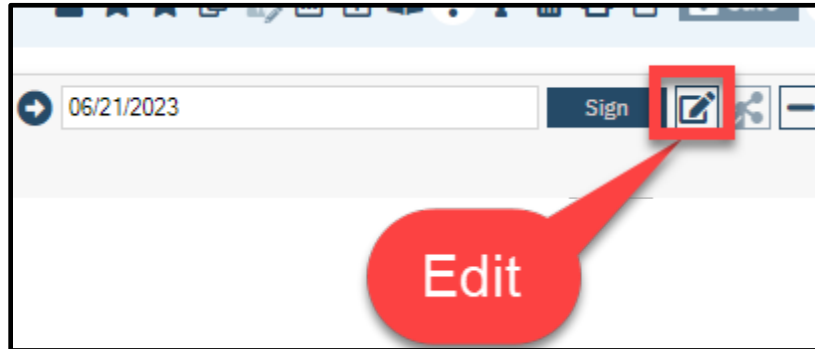
- Confirmation Message:** You will receive a pop-up asking the approver if they would like to decline the signed document. Click okay.



- Return to Services/Note:** The author will return to the progress note to see if the progress note is approved or decline.



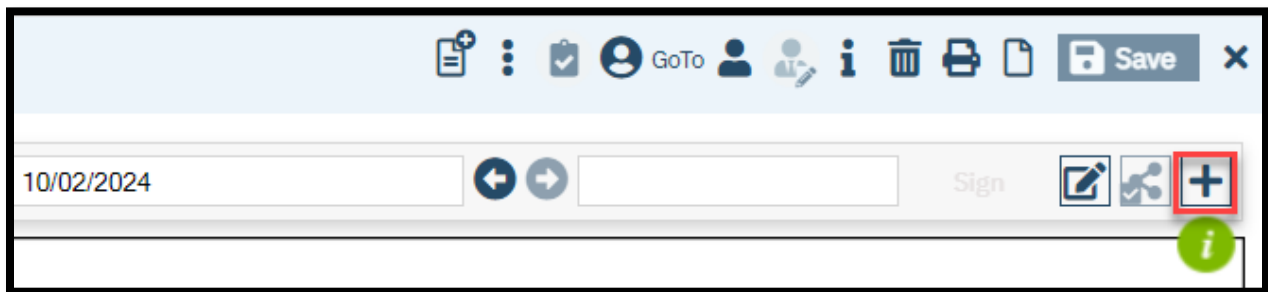
- 9. **Edit:** If the document is declined, click the **Edit** button to create a new version of the original progress note/assessment.
  - a. **Edited Note/Assessment:** The edited document should be resent to the approver for review after the updates have been made.



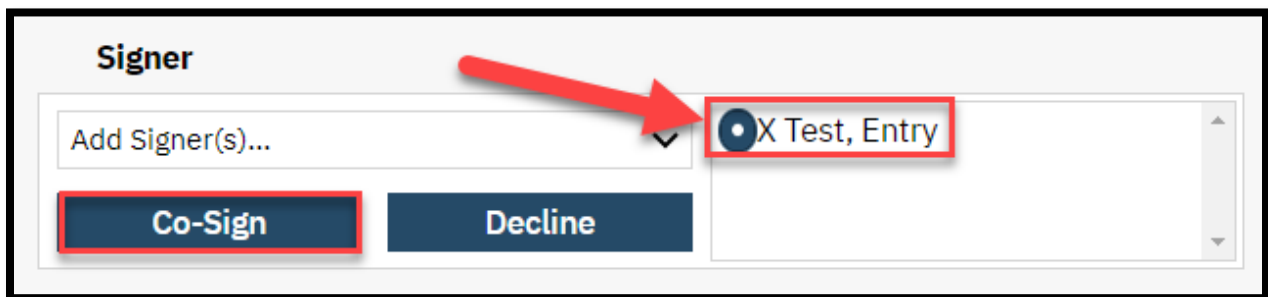
### How to Add a Client as a Co-Signer

Some SmartCare forms require an electronic client signature, for example, the client consent forms. Once signed by the author, follow the steps below to add the client as a co-signer to obtain their electronic signature.

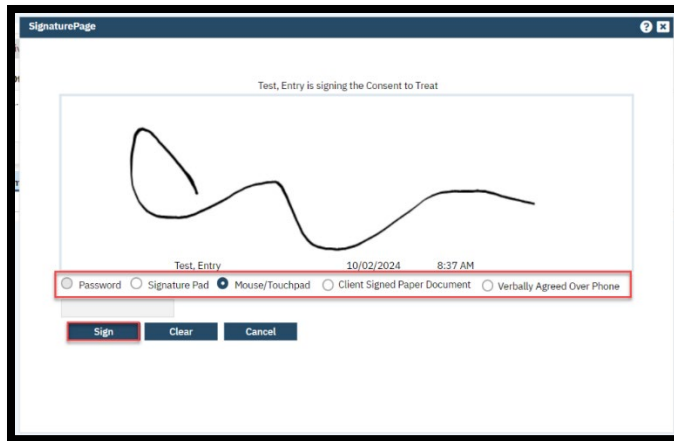
- 1. The author of the document will fill out the form as appropriate, then sign the document.
- 2. Once the document is signed, a co-signer can be added by clicking the **plus sign**.



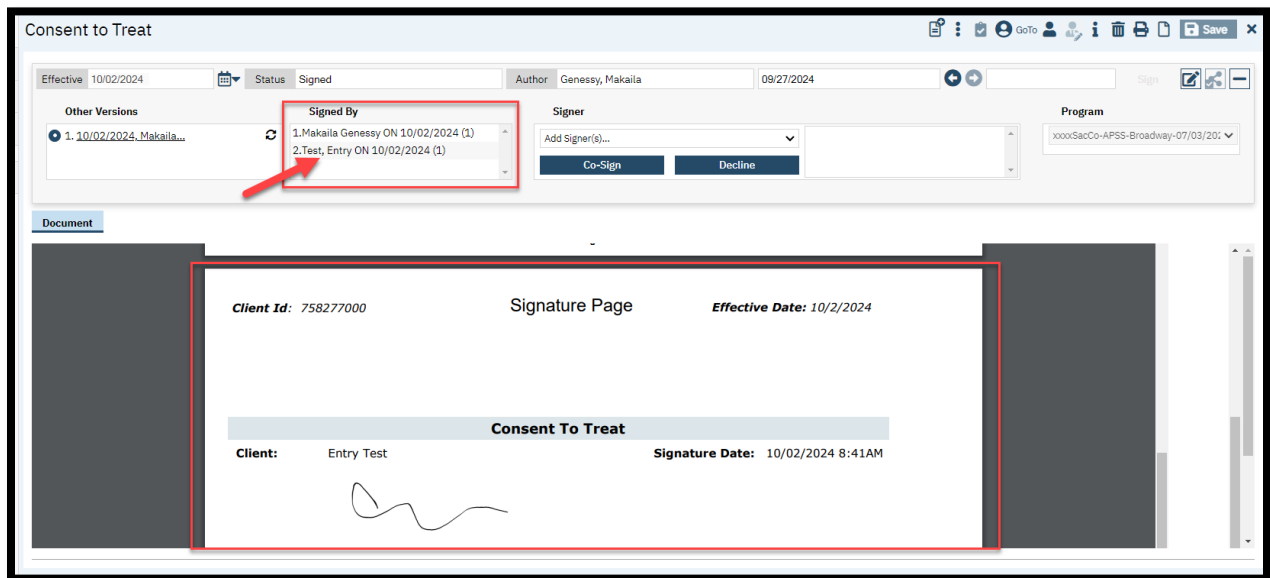
- 3. Click the radio button next to the client's name, click Co-Sign



4. The Signature Page will then populate: from here you can select how they will sign. For this example, mouse/touchpad was selected, the signature was created and then the sign box is selected.



8. The signature page will then populate at the end of the PDF document, and in the signed by box, it notes that the document was signed by the client



### How to Remove a Co-Signer

To remove a co-signer, open the co-sign panel as normal, and in the signer box, select the X next to the co-signers name to remove them.

