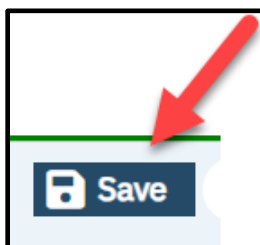


Co-Signer Tip Sheet

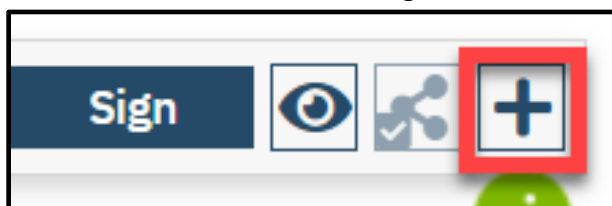
This Tip Sheet will walk users through how to cosign a Service/ Progress Note or Assessment. Also, this tip sheet will show approvers how to approve and decline Services/Progress Notes or Assessments. This process may eventually change as the system is updated. Please visit our website <https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx>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

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.**



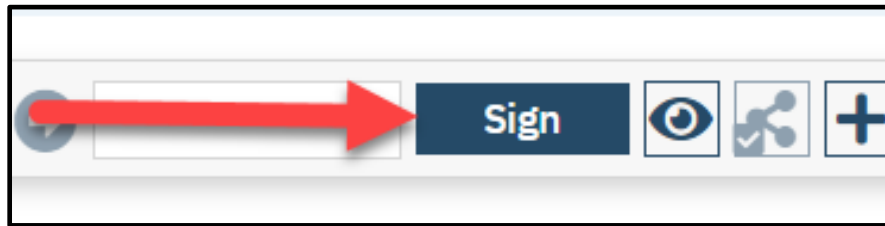
3. **Plus Icon:** Click on the "Plus Icon" to add a co-signer.



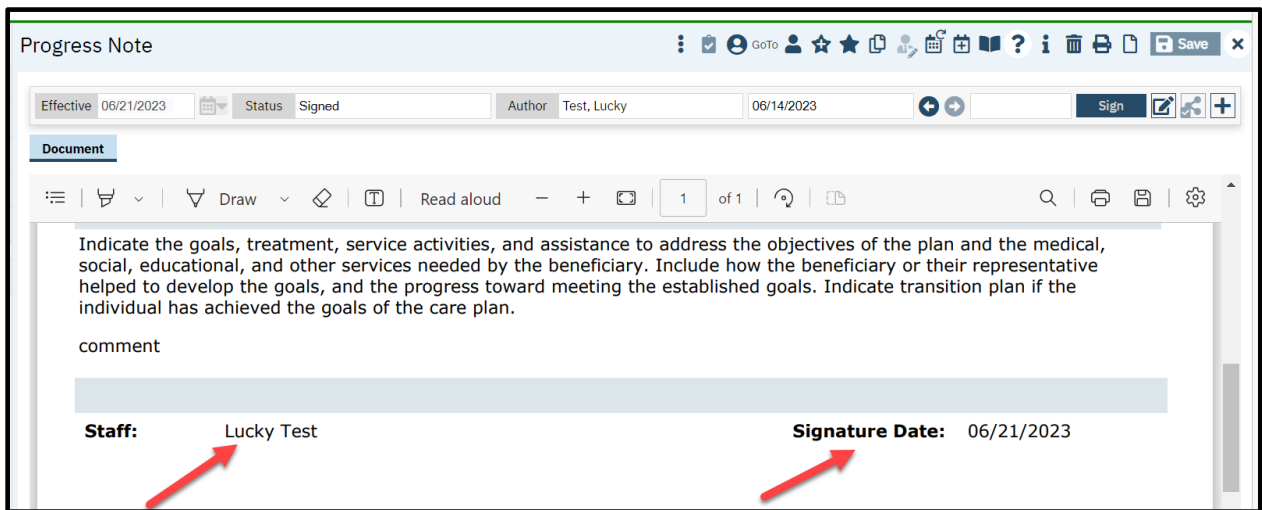
4. **Select the Signer:** Use the drop down to select the Co-Signers name, once selected it will appear in the display box to the right.
 - a. If you select the wrong person in error, click the X to remove the name.



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



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

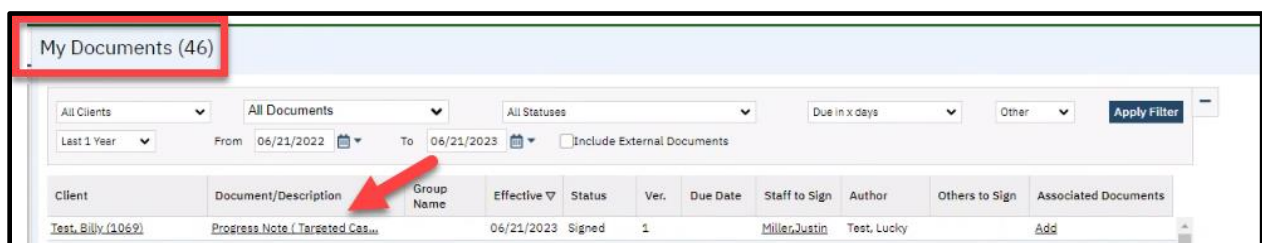


Receiving a document to sign.

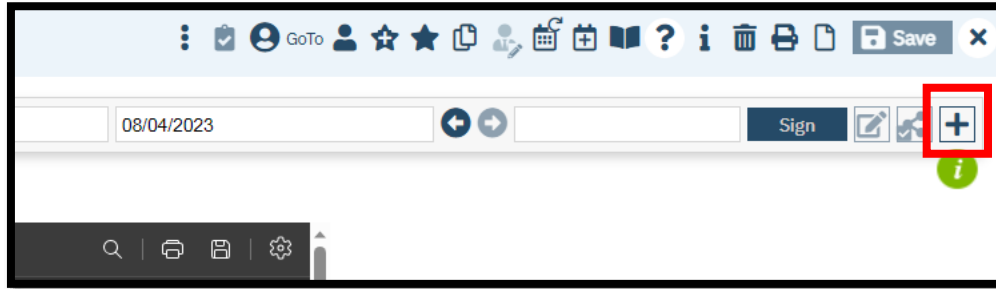
Approvers can check their My Document screen for items sent to them by staff to be signed. Friendly reminder: Approvers will not be notified when they receive a document to sign. It is recommended that your agency create an approval notification process.

Sign Document Process:

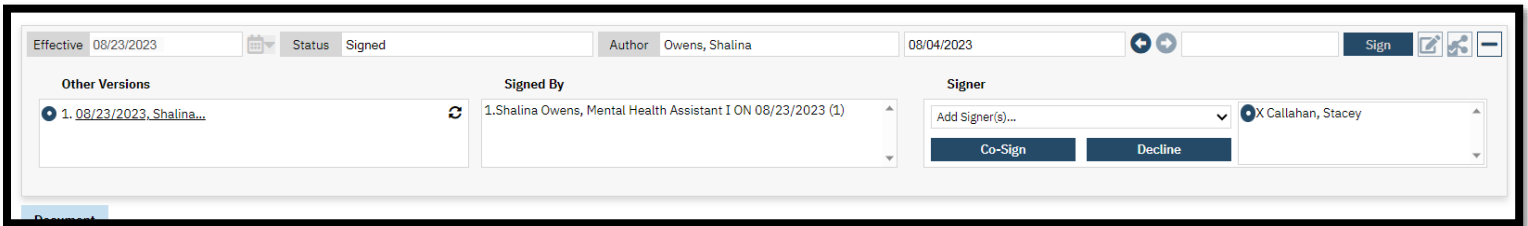
- My Documents:** In the search field search "My Documents (My Office)"
- Select Document/Description:** Select the document you would like to review, by clicking on the "Document/Description" hyperlink.
 - Note: If you are unable to find an item, adjust the filters and click "Apply Filter".



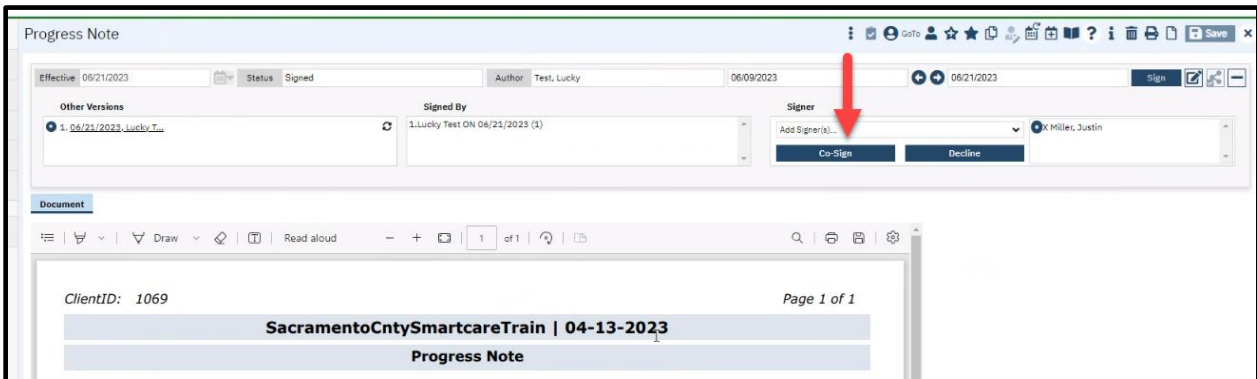
- 3. **Select “More Details” button:** Click on the “More Details” button to pull up the co-signer portion.



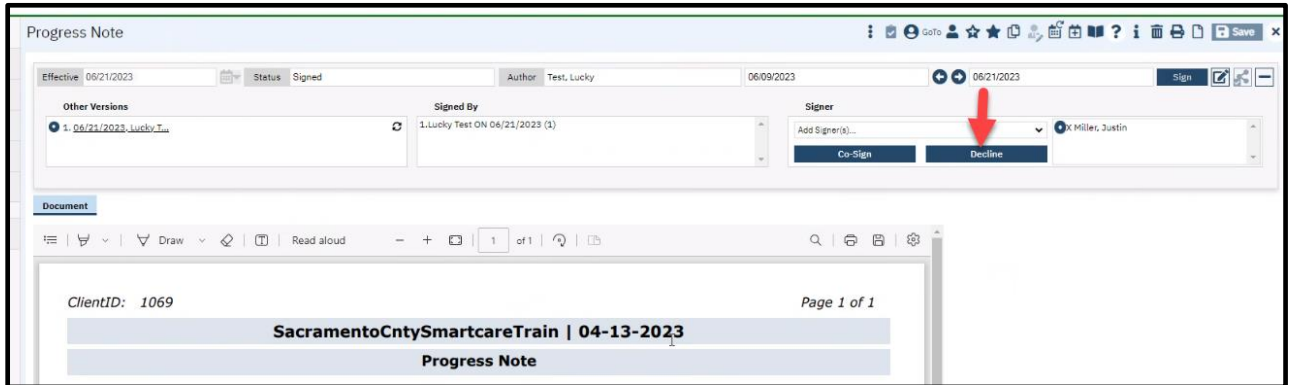
- 4. Select your name and either click **Co-Sign** to approve or **Decline** to reject.



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



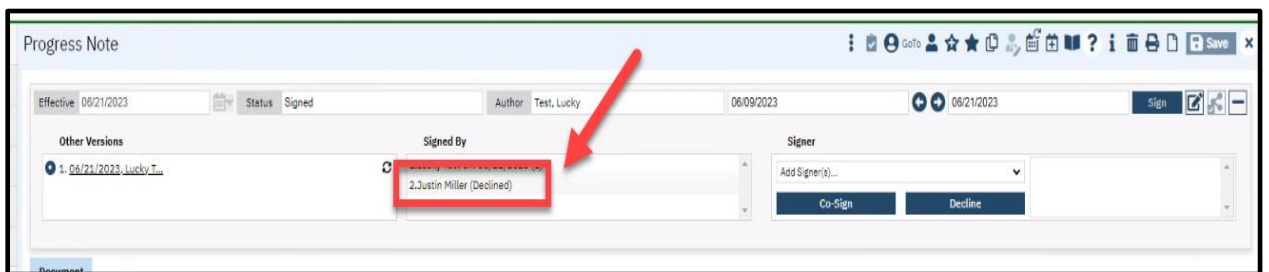
- 6. If the Note is **declined**, the approver will need to notify the author to make updates to the original note.



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



- 8. **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.

