P-2375 Case Management (continued)

P-2375D Signatures on Reach Up Documents(B21-08)

There are many forms and agreements that require a signature for the Reach Up program. The type of signature that is required depends on the type of document.

Types of signatures

Verbal Agreements/Signatures

Verbal agreements/signatures are acceptable for the following:

- Reach Up services related forms that are not releases, such as Family Development Plans (FDPs) and conciliation resolutions; and
- Releases that are not authorizing the disclosure of HIPAA protected information as well as substance use treatment records.

Electronic Signatures

Electronic typed signatures, with or without authentication measures, are acceptable for the following:

- The forms listed above; and
- Eligibility related paperwork, such as 202 Applications, Interim Reports (IRs), employment information forms, etc.

Typed signatures for these forms are acceptable because they do not contain authorizations to release HIPAA-protected info.

Physical Signatures

Physical signatures (sometimes referred to as "wet" signature) are required for any releases that authorize the potential release of HIPPA protected information.

This includes the following:

- Waiver of Confidentiality (form 201WC) when HIPAA protected information and/or substance use treatment records may be shared;
- Referrals to mental health and substance use treatment providers; and
- Releases included with Reach Up related medical forms such as the 210TMD and 660MRR.

A picture of the signed form is acceptable, similar to a fax or photocopy.

Case Manager Support

Signing Documents Using Electronic signatures

The following instructions refer to signing the Family Development Plan (FDP) electronically, however these practices can be used to sign other documents.

Signing Using PDF

1. Open Notices and find the FDP you would like to send to the participant. Save the FDP to your computer and attach to an email. (The FDP will save as a PDF.)

   a. There is an ACCESS video available that will help (Printing FDP from Notices).

2. Participant would open the PDF (they may need to save the document to their computer especially if they do not have Adobe).

3. Click on Fill & Sign.
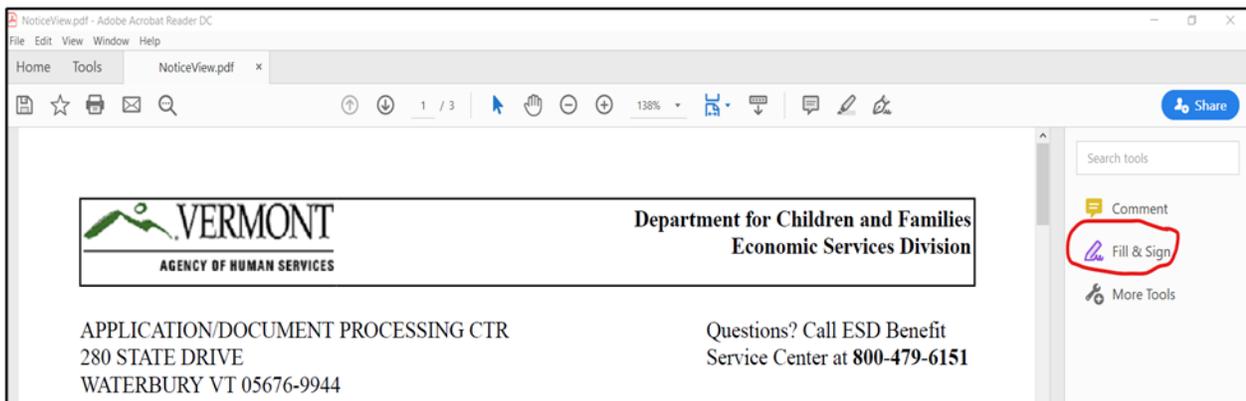
4. Click where you want to sign.
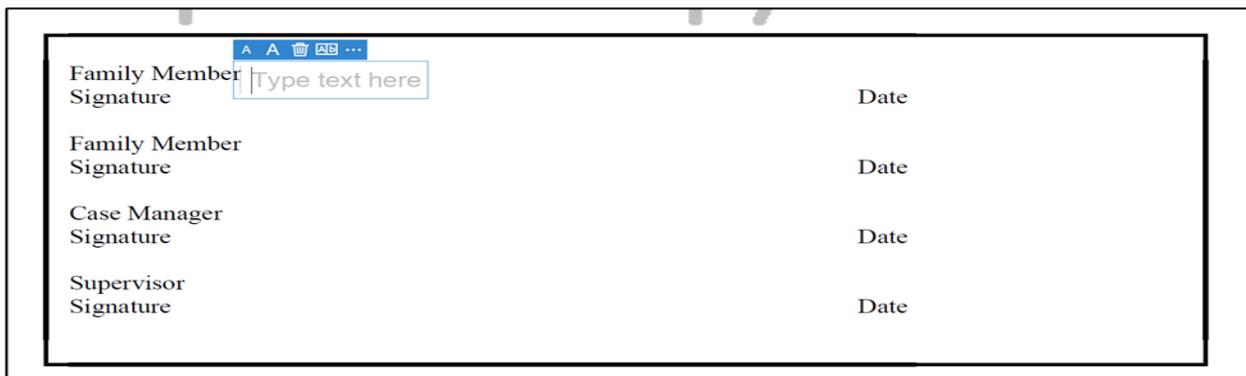
5. Type signature and date.

6. Close "fill and sign" by clicking the close button.
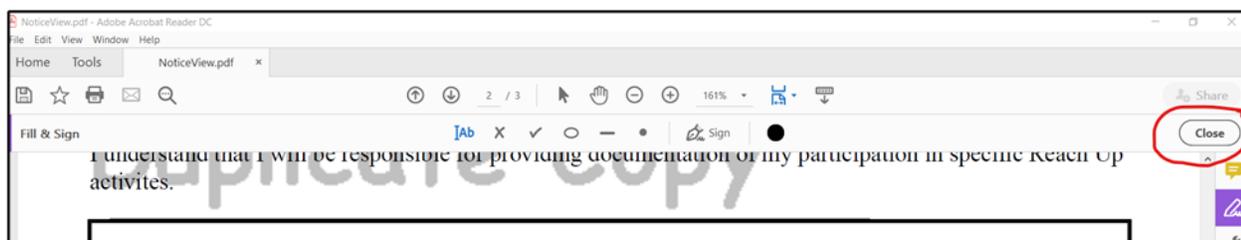
7. After the document is signed there are two options to send the PDF by email:

   a. Save the PDF to your computer and attach to an email, or

   b. Use the email function on the PDF.
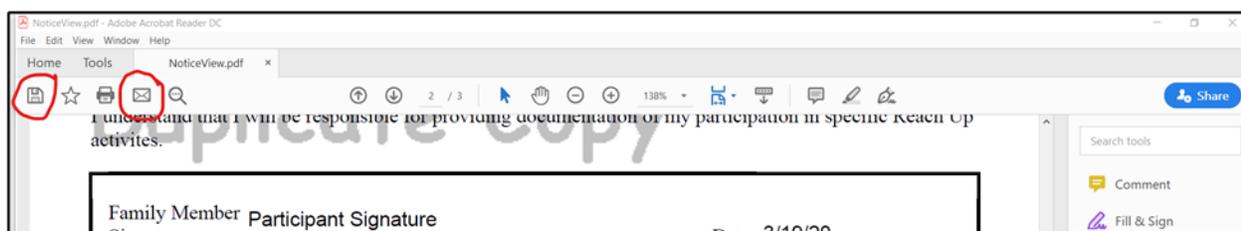
Signing Documents Using Word

1. Create a FDP using the FDP Word Document 614.

2. Save the FDP to your computer and attach to an email.

3. Participant would open the Word document and save it to their computer.

4. The participant will type their name, save the document, and send it back.

5. If the participant is unable to open a word document, try converting the Word document to an PDF.

   a. To convert a word document to PDF. Go to file, select export, create PDF/XPS, and save to your computer.
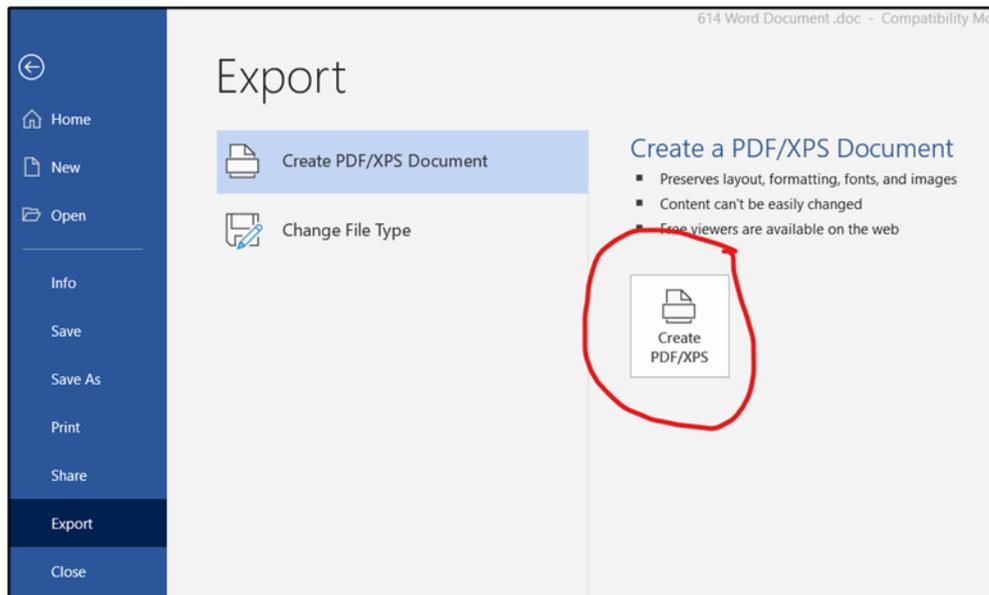
Signing FDP with an Android Phone

Follow the steps in the YouTube video. The key is to download a free app called Adobe Fill & Sign.

https://www.youtube.com/watch?v=UB4BuNuIHUA

Signing FDP on iPad or iPhone

Follow the steps in the YouTube video.

https://www.youtube.com/watch?v=SHo7BwxHYaU

The steps in the video will not work on older models. Follow the steps below for older iPhones and iPads.

1. Save the FDP or document as a PDF and attach to an email.

2. Open the PDF on your phone.

3. Click the button in the upper right corner.
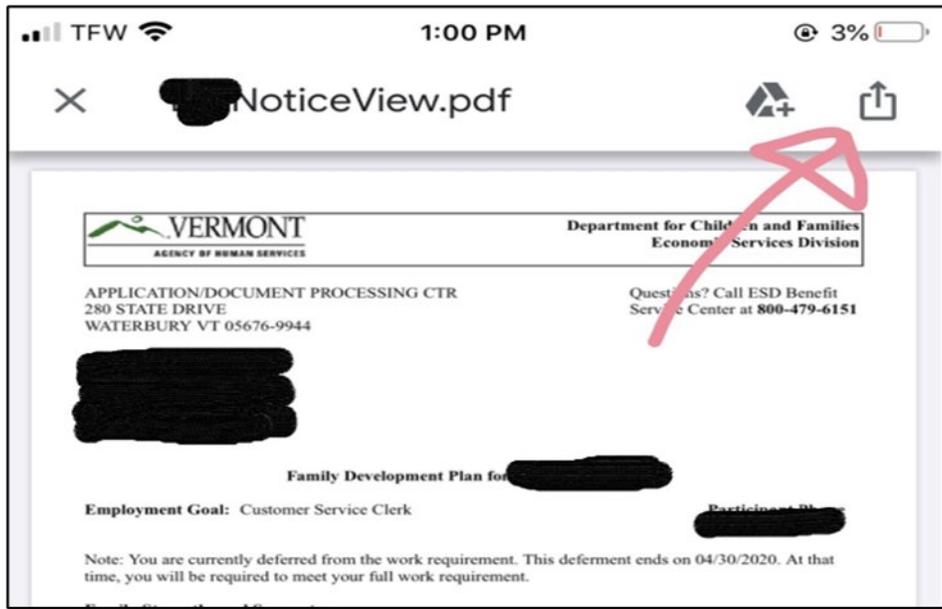
4. This will give you two options, select "Share File Via…"
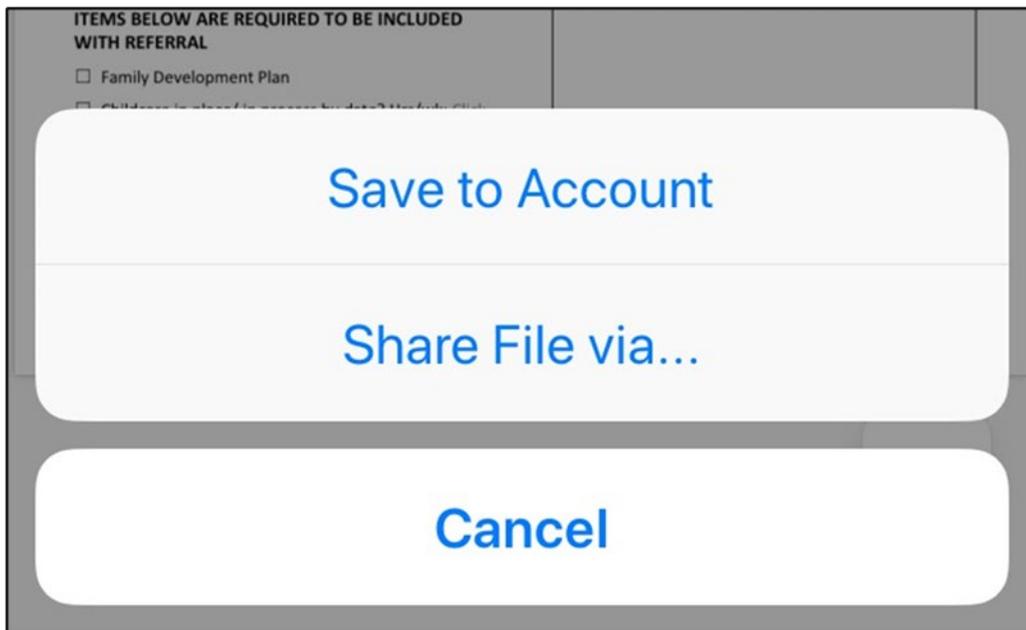
5. Scroll down to the "Markup" option.
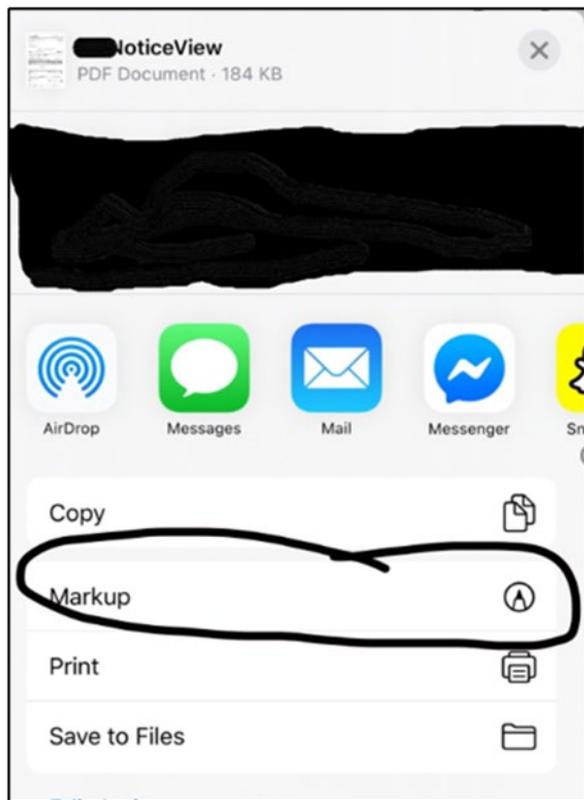
6. It will pop up different writing utensils or you can select the plus sign for different options.

Note: for a multiple page document select the blue pen icon on the far right, which will allow you scroll to the page you would like to sign. When you get to the page you want to sign click the blue pen icon again.
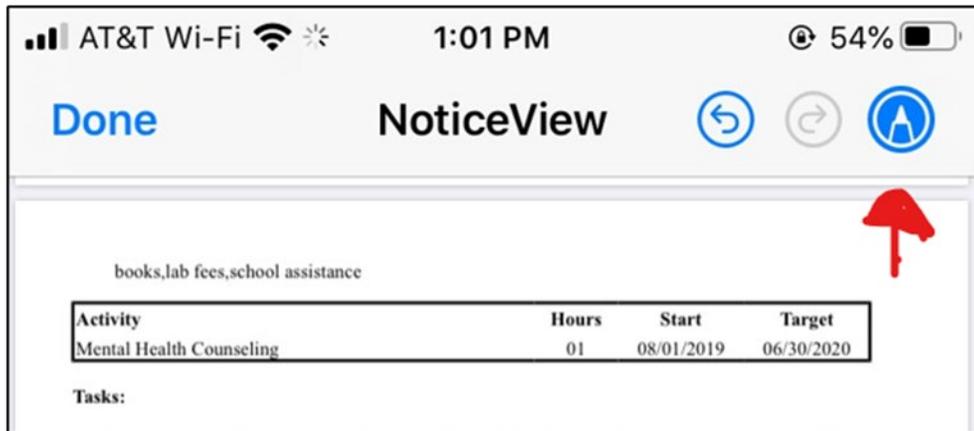
7. Once the document is signed select "Done" and "Save File To…".
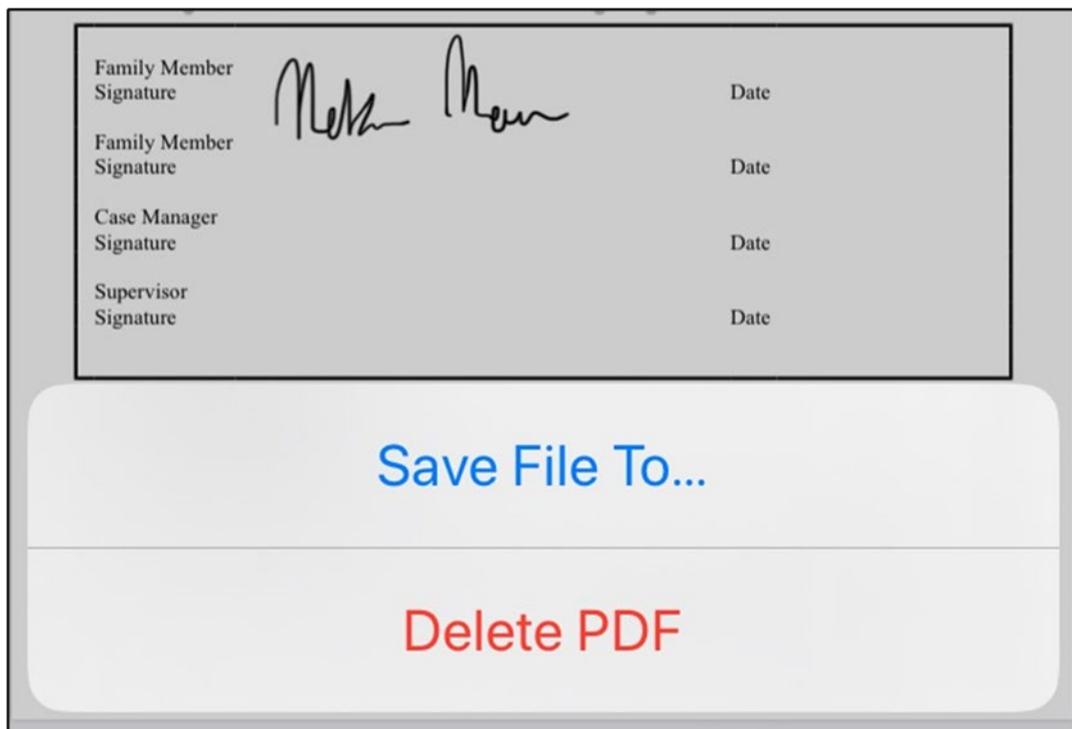
8. Save the file to your phone and attach to an email.