eSignature User Guide

This manual will detail how to use the Valant IO eSignature. The feature is an integrated solution to allows a practice to create packets of one or more customized templates that can be sent through the Patient Portal for patient signature.

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Part One: eSignature Setup

Module

Practices must to have the Patient Portal and Electronic Signature modules. This must be completed by a Valant team member.

Permissions

Both Staff and Providers can access eSignature. Users will need to have Persons and Institutions, Edit Documents, Upload Documents, View Practice Documents and Manage eSignature permissions to use the full functionality. These permissions can be changed by a Valant team member or Valant user with access to the "Admin Module".

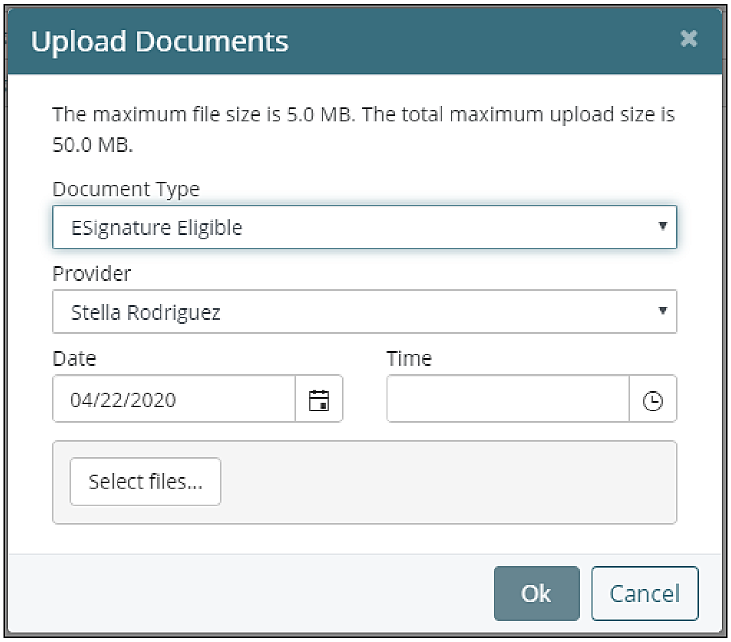
Part Two: Creating Templates and Packets for eSignature

eSignature Templates

Documents that will be signed by patients must first be uploaded or created in Valant using the Document Type "Esignature Eligible". This will allow a practice to customize their own templates to be included in packets that will be sent to patients. Users who will creating templates must have the "Manage eSignature" permission.

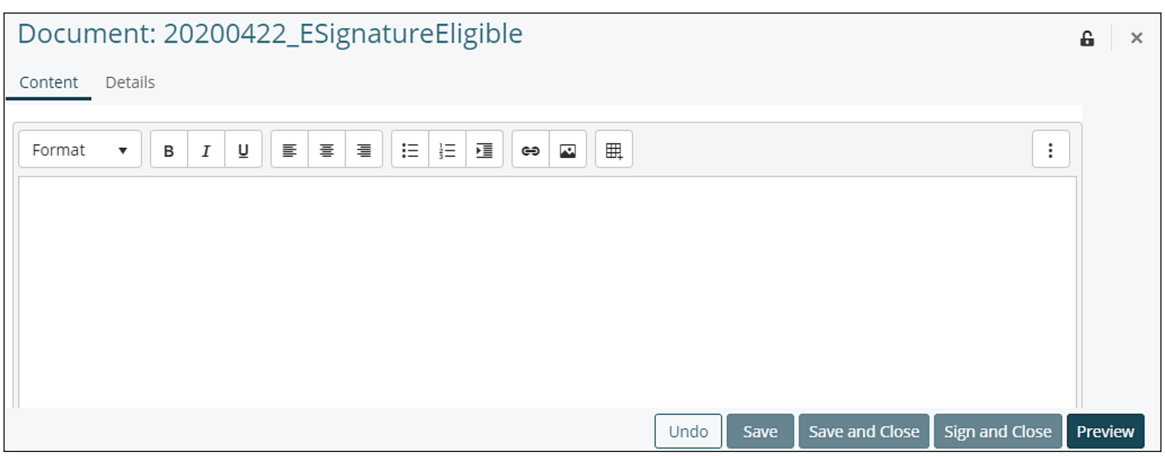
Practices can upload their own documents into Valant for eSignature by:

1. Clicking **Documents | Practice Documents | Upload Document**
2. Under "Document Type" select **Esignature Eligible**
3. Select the specific file(s) to upload
    - While pdf, docx, txt, and other file types are supported. However, due to spacing and formatting issues pdf files are recommended.
    - Please note that the template name will be the same as the document name, so it is recommended to use unique names. If more than one template has the same name, then a number will be added to the end of the template name.
4. Click **Ok**



Uploading documents is the recommended way to create templates because of the pdf preference. Practices can also create templates within Valant and prepare them for eSignature by:

1. Clicking **New | New Practice Document**, selecting Document Type "ESignature Eligible" and clicking **Ok** or by clicking **Documents | Practice Documents | New Document**, selecting Document type "ESignature Eligible" and clicking **Ok**
2. Both paths take users to a text editor to configure docx that can be configured for eSignature
3. Saving the document will put the document in Unsigned Documents. When the document is complete click **Sign and Close**



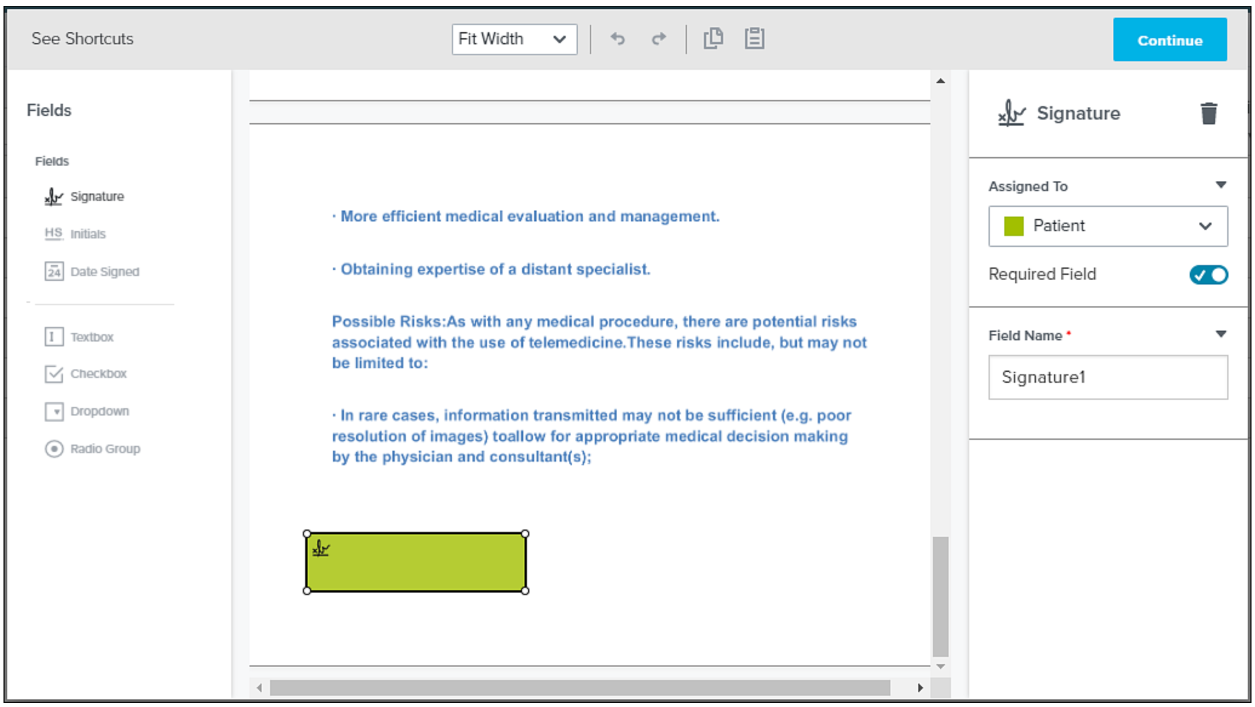
Documents that are Esignature Eligible can be inactivated or reactivated. This will have no effect on templates created from the document.

Configure for eSignature

After being uploaded or created in Valant users will need to "Configure for eSignature" from the "Practice Documents" page. To configure a document for eSignature:

1. Click **Action | Configure for eSignature**

2. This will open a page to configure the document into a template. This includes options to include fields for signature, initials, date signed, textbox, or checkbox. All fields are drag and drop that can be dragged directly onto templates and resized



3. Click **Continue** when finished

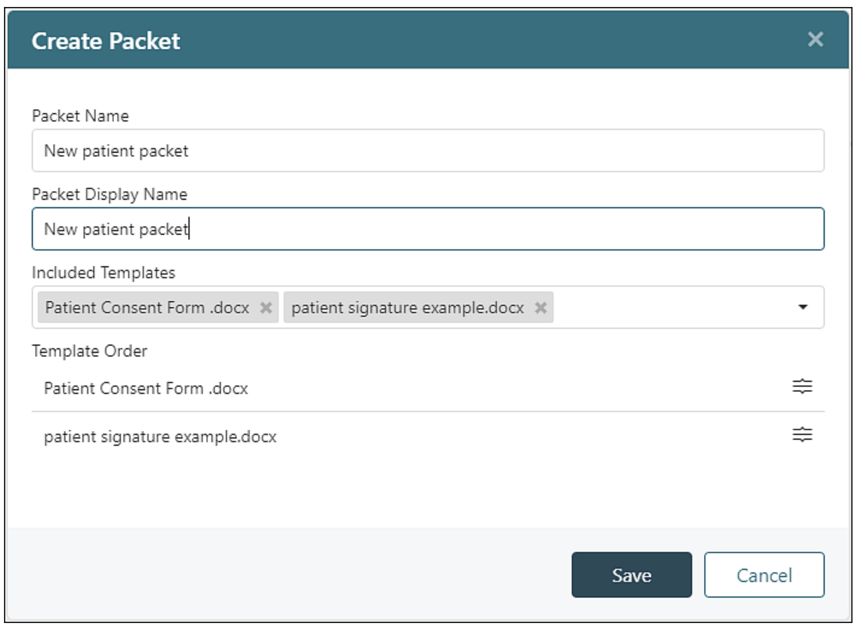
   - Note a document can only be configured into a template once and this cannot be edited.

After a template has been created users will have the option to select "Inactivate eSignature Template" from the "Action" dropdown. If users inactivate a template, they will receive a pop-up warning about the inability to include the templates in packets, or it being removed from existing packets. Inactivating a template will remove it from packets. It will not affect eSignature Requests already sent to patients. Templates can be reactivated to be included in eSignature Packets.

eSignature Packets

Packets containing one or more templates that are configured for eSignature are sent to patients through the Patient Portal. Packets can be configured by:

1. Clicking **Documents | Manage eSignature Packets**
2. Click **New**
    - Give the packet a name (internal name only visible by the practice)
    - Display Name (patient will see if sent the packet)
    - Select one or more templates from the "Included Templates" drop-down list.
    - Templates order can be edited by clicking and dragging on the icon next to the template name.



3. Click **Save**

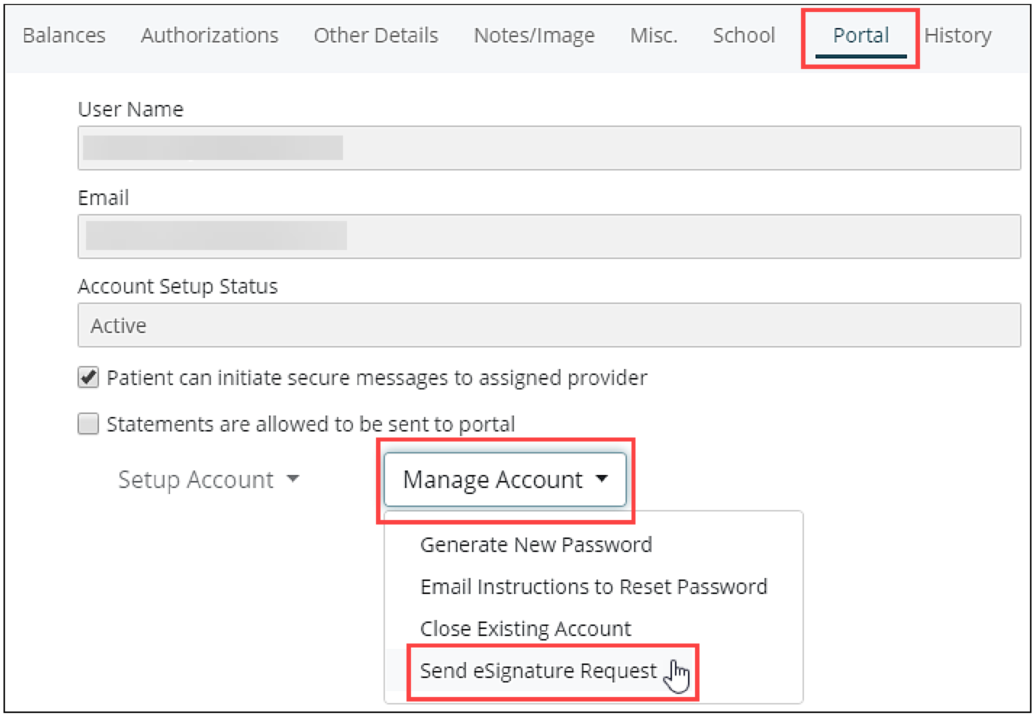
Once a packet is configured it can be sent to patients. Packets can be edited to add or remove templates from the packet. Click **Action | Edit** to change contents of a packet. Editing a packet will not affect eSignature requests that have already been sent to patients.

Part Three: Sending and Monitoring eSignature Requests

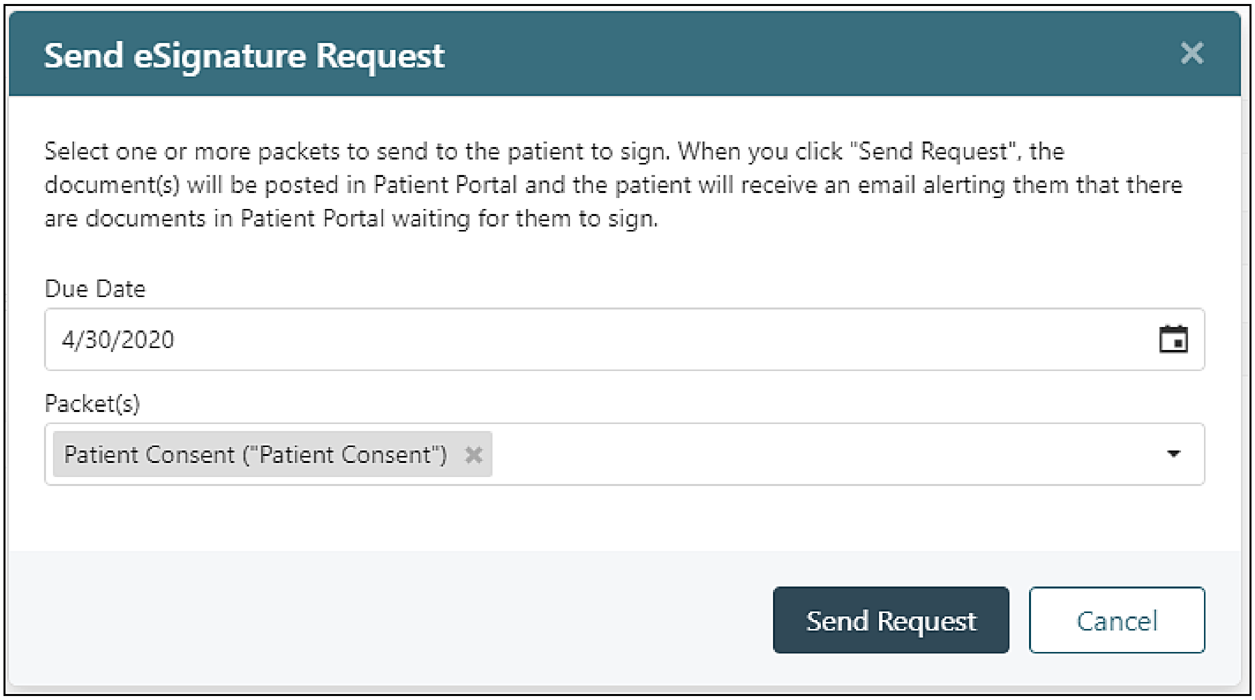
After packets have been created, they can be sent to patients. There are also different wats to manage Unsigned eSignature Requests. Users do not need the “Manage eSignature” permission.

Persons and Institutions | Patients | Portal

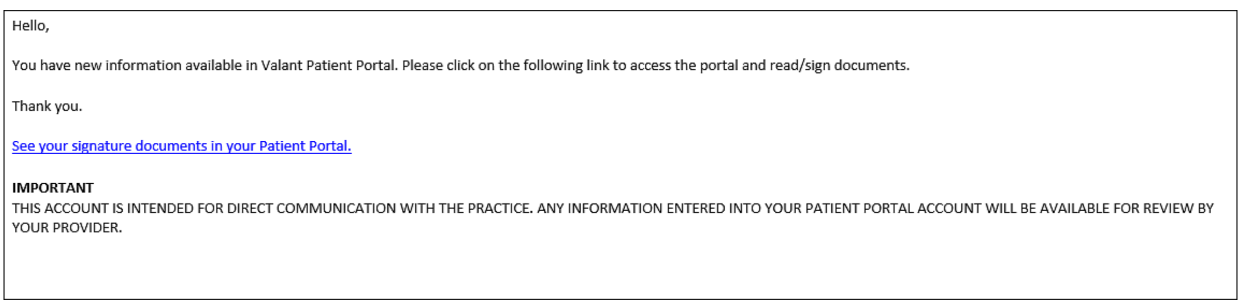
eSignature Requests can be sent to patients by selecting **Persons & Institutions | Patients** select the patient, then select the **Portal** tab. Click the "Manage Account" drop-down and select **Send eSignature Request**.



This will open a "Send eSignature Request" pop-up to select an optional due date for the packet and select the packet(s) to assign to the patient. Multiple packets can be sent to a patient in the same eSignature Request. Packets with an eSignature request can be re-ordered just like templates within a packet. Click **Send Request** to send the eSignature request to the Patient Portal account.



Once sent the patient will receive an email notification with a link to access the portal if they have an email associated with their patient portal account or home email in the patient demographics.


Hello,

You have new information available in Valant Patient Portal. Please click on the following link to access the portal and read/sign documents.

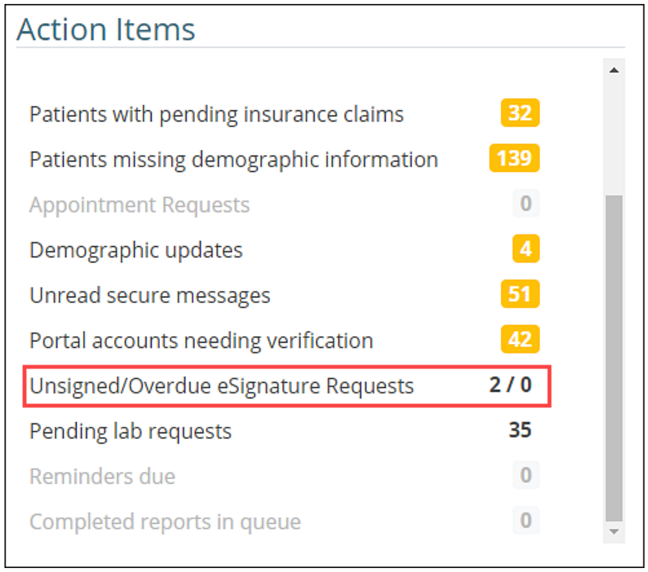
Thank you.

See your signature documents in your Patient Portal.

IMPORTANT
THIS ACCOUNT IS INTENDED FOR DIRECT COMMUNICATION WITH THE PRACTICE. ANY INFORMATION ENTERED INTO YOUR PATIENT PORTAL ACCOUNT WILL BE AVAILABLE FOR REVIEW BY YOUR PROVIDER.

Unsigned/Overdue eSignature Requests

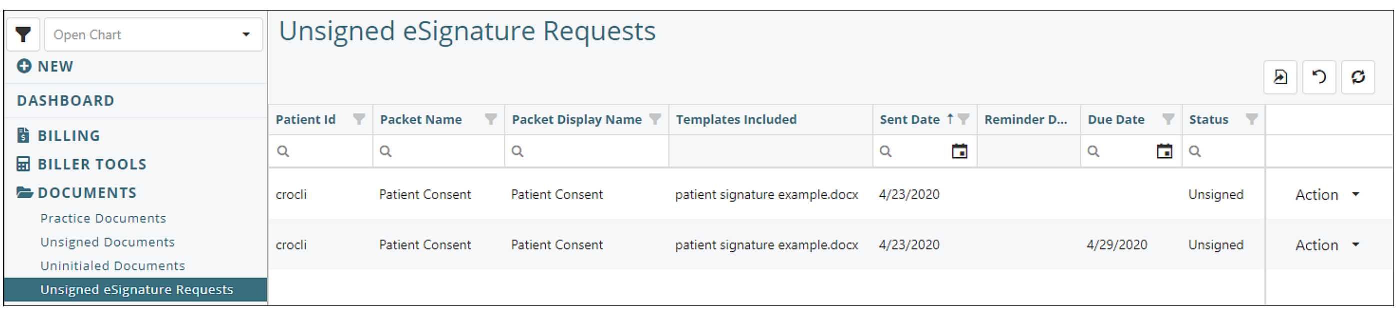
"Unsigned/Overdue eSignature Requests" is an Action item on the Dashboard that allows practices to view eSignature requests that are sent to patients but have not yet been returned. Unsigned eSignature Requests are considered "overdue" if they are past their due date.



Clicking on the action item will open the "Unsigned eSignature Requests" page, this page can also be accessed by clicking **Documents | Unsigned eSignature Requests**.

Unsigned eSignature Requests

This page allows users to see packets that were sent to patients and the date the request was sent, the due date and the status. Click the "Action" drop-down and select "Send Reminder Email" to manually resend the email to the patient, “Dismiss” to cancel an eSignature Request, or “History” to view an audit log.



There are two different status that can be seen for a request:

- Unsigned: the patient has not clicked on the request in the Patient Portal
- Initiated: the patient has clicked on the request in Patient Portal, but has not yet signed
- Dismissed: the practice has dismissed the eSignature Request (this status is hidden by default and must be manually added to the column filter.)

Once a patient completes the eSignature Request, they will receive a copy of the eSignature Request in the Signed Forms section of the Practice Paper Work” in their patient portal and a copy will appear in the Patient Chart under "Documents".

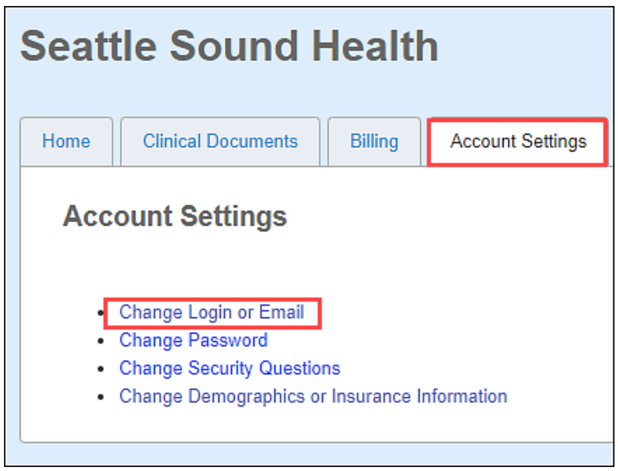
Part Four: Patient View of eSignature

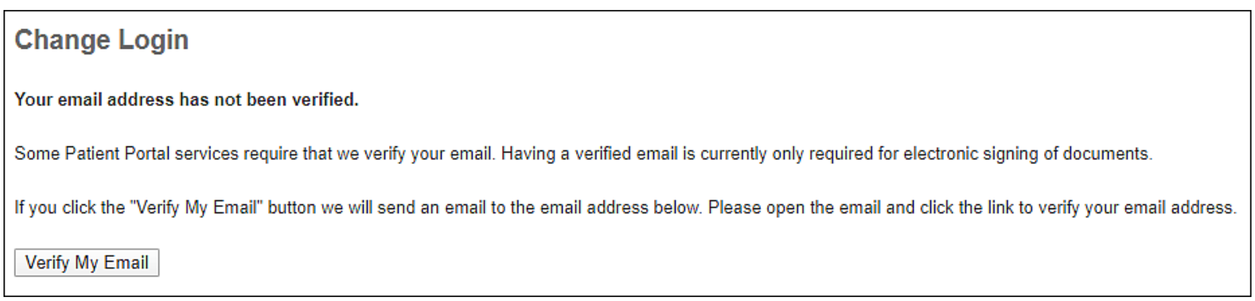
Details of how a patient will verify their email and options for completing eSignature requests

Email Verification

To be eligible for eSignature the patient must have a configured Patient Portal Account and a verified email address. Patients without a verified email can use the Patient Portal but they are not eligible for eSignature. Users can send a request for eSignature to a patient without a verified email, but they cannot sign until their email is verified.

From the Patient Portal a patient can verify their email by clicking **Account Settings | Change Login or Email | Verify My Email**.





Change Login

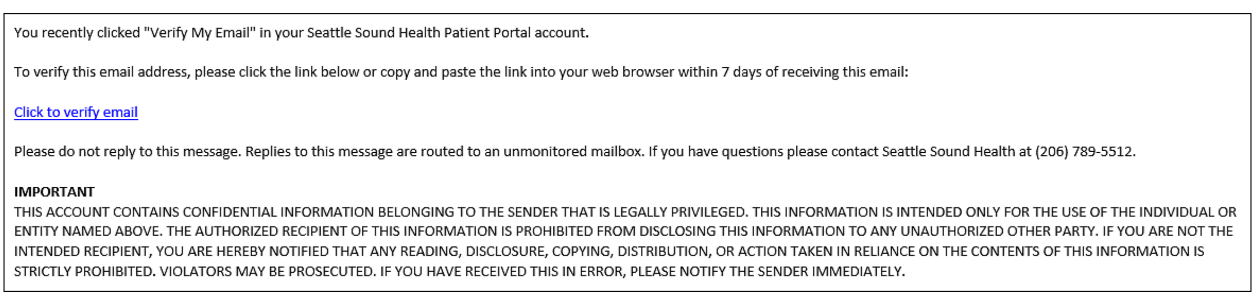
Your email address has not been verified.

Some Patient Portal services require that we verify your email. Having a verified email is currently only required for electronic signing of documents.

If you click the "Verify My Email" button we will send an email to the email address below. Please open the email and click the link to verify your email address.

Verify My Email

This will send an email to the patient and they will need to click a link to complete verification.



You recently clicked "Verify My Email" in your Seattle Sound Health Patient Portal account.

To verify this email address, please click the link below or copy and paste the link into your web browser within 7 days of receiving this email:

Click to verify email

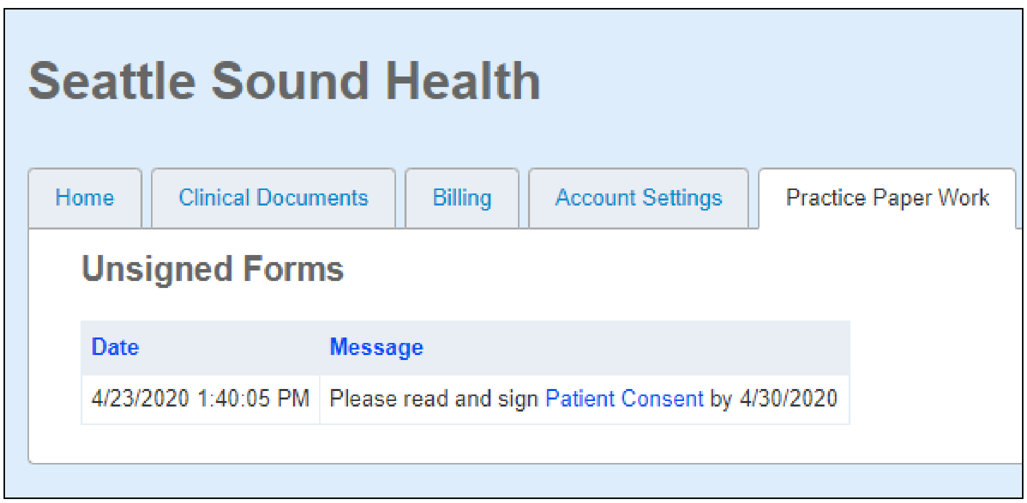
Please do not reply to this message. Replies to this message are routed to an unmonitored mailbox. If you have questions please contact Seattle Sound Health at (206) 789-5512.

IMPORTANT
THIS ACCOUNT CONTAINS CONFIDENTIAL INFORMATION BELONGING TO THE SENDER THAT IS LEGALLY PRIVILEGED. THIS INFORMATION IS INTENDED ONLY FOR THE USE OF THE INDIVIDUAL OR ENTITY NAMED ABOVE. THE AUTHORIZED RECIPIENT OF THIS INFORMATION IS PROHIBITED FROM DISCLOSING THIS INFORMATION TO ANY UNAUTHORIZED OTHER PARTY. IF YOU ARE NOT THE INTENDED RECIPIENT, YOU ARE HEREBY NOTIFIED THAT ANY READING, DISCLOSURE, COPYING, DISTRIBUTION, OR ACTION TAKEN IN RELIANCE ON THE CONTENTS OF THIS INFORMATION IS STRICTLY PROHIBITED. VIOLATORS MAY BE PROSECUTED. IF YOU HAVE RECEIVED THIS IN ERROR, PLEASE NOTIFY THE SENDER IMMEDIATELY.

Email verification can take place before or after the eSignature Request is sent to the patient. If a request is sent before verification there will be a notification on the Patient Portal “Home” page, and “Practice Paper Work” page” to verify the email before allowing eSignature.

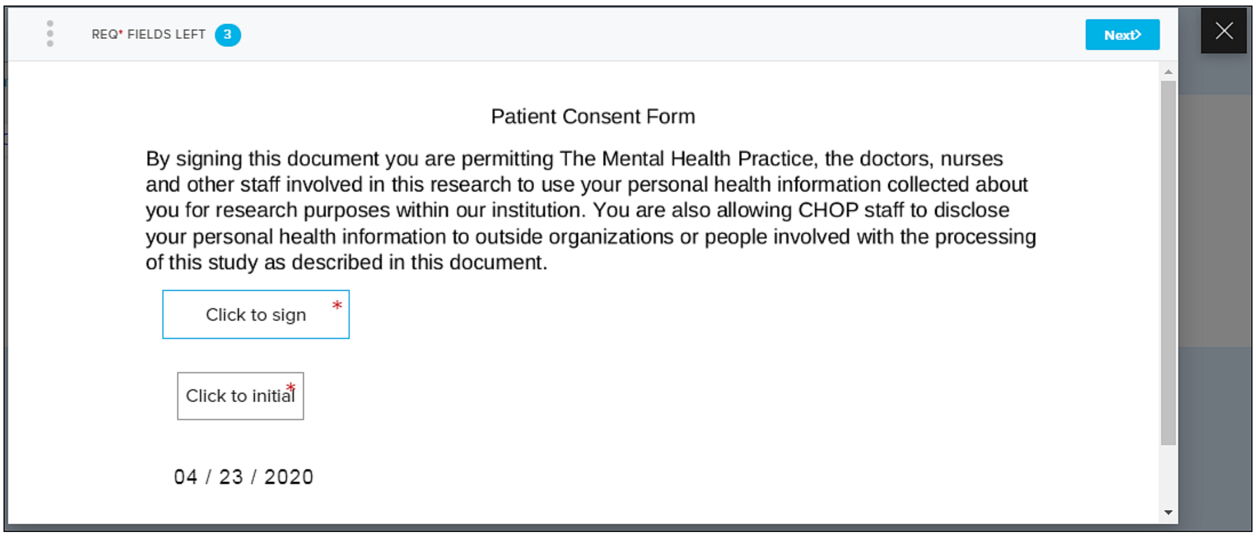
Patient View While Signing

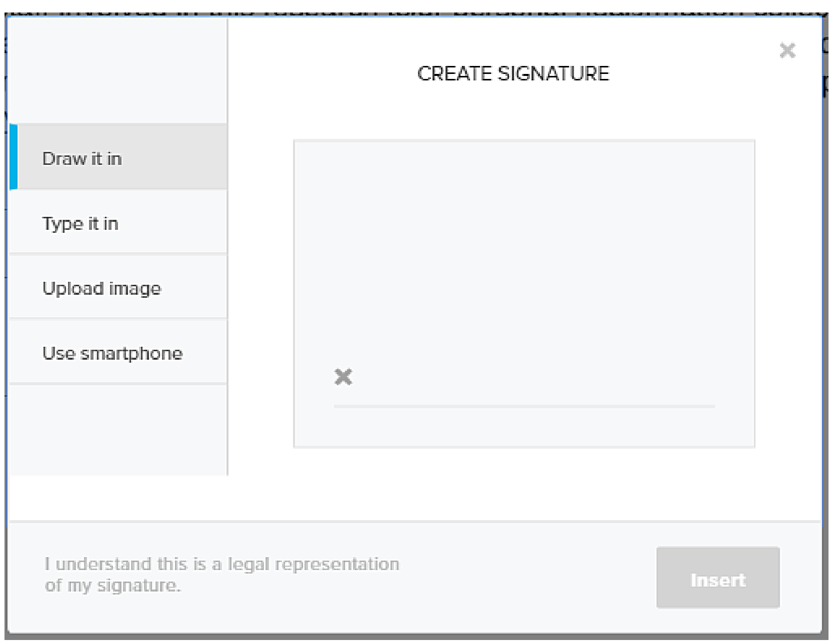
When a patient with an eSignature Request logs into their Patient Portal, they can see pending requests on their home page. Patients can click the link to access the documents. They can also access eSignature Requests on the "Practice Paper Work" tab under Unsigned Forms.



1. Patients will need to click on the hyperlink text which will feature the packet display name. If multiple packets are included, all of the display names will be listed, and separated by a comma.
2. This will open the eSignature request. Patients should click the **Get Started** button on the top right to take the user to the first field to be completed.

3. When the eSignature text box is selected another menu will appear with different options for the patient to complete the request.

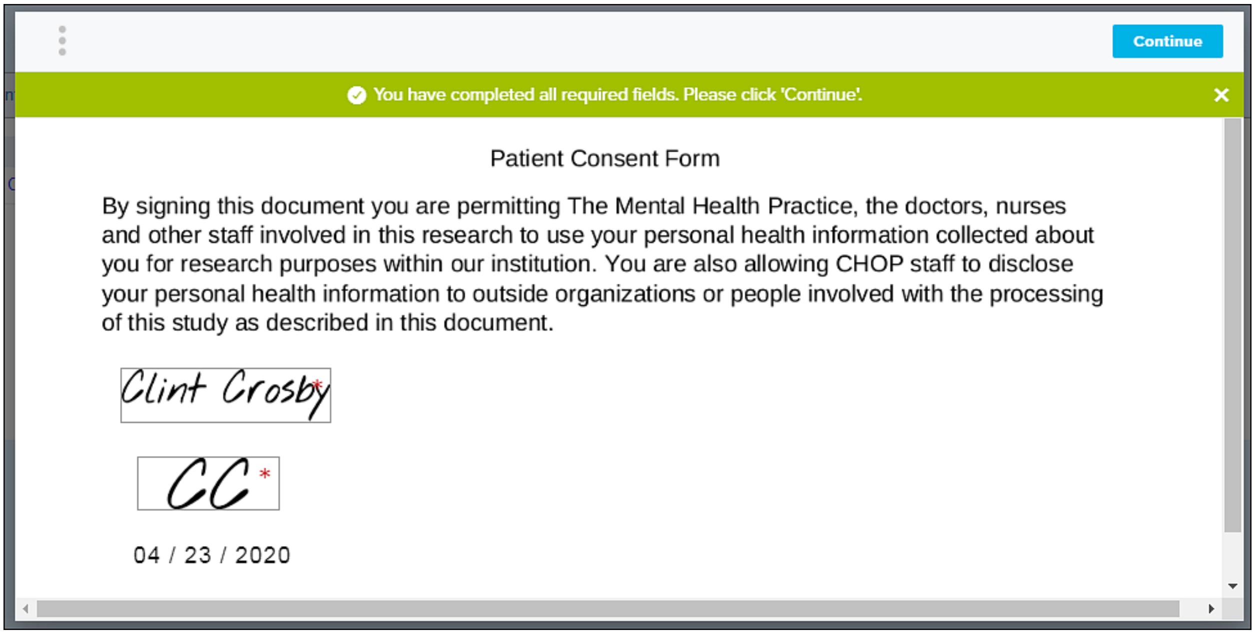




4. Patients have the option when signing:
   - Draw in the text box with their mouse
   - Type in their signature and have options to edit the font

- Upload an image of their signature
- Use smartphone allows users to take a photo of their signature and email it to sign@hellosign.com with a unique code in the subject line.

5. Click Insert and complete all other required fields
6. After the document has been completed patients will click **Continue** on the top of the page



7. Next the patient will be prompted to click **I agree** button to confirm.

This will complete the e Signature request and send the document to the patient chart as well as upload a copy of the document to the Patient Portal. All documents signed by patients are available under "Signed Forms" section on the “Practice Paper Work” page. Signed documents are sometimes not immediately available through the portal and are usually processed in a few minutes.

Part Five: Things to Remember

Notes

- Patient Portal is supported for the latest versions Firefox, Chrome, Edge, and Safari. However, Internet Explorer cannot be used with eSignature.

- Currently eSignature is only for patients and should not be used for signature from anyone but the patient.
- Remember that sometimes eSignature email notifications may be filtered into the junk folder and patients should check those folders. Emails regarding eSignature will come from no-reply@valant.com.
- Documents will appear in the patients chart once signed and will no longer appear on the “Unsigned eSignature Requests” page.
- eSignature Requests should not be used for patients to submit credit card information.
- If a patient is in the process completing an eSignature Request and a practice dismissed the request will still be successfully signed.