

# Treatment Plan Remote and Multiple Signers

Remote signing expands the number of external signers from one (only patient or guardian) to up to five (patient, guardian 1, guardian 2, guarantor, and other) and allows that signing to take place either via email or on a practice device.

## Prerequisites

- Customer must have non-core module “Treatment Plan Clinical”.
- User must be a provider who is the owner of the treatment plan.
- The patient must have an active diagnosis code.

## Steps for Signing

A provider creates a Treatment Plan for a patient ([Creating a New Treatment Plan](#) article), or updates an active Treatment Plan.

To enable signing functionality, the “External signer(s) required to sign” must be checked.

Signers

External signer(s) required to sign

Patient required to sign  
Mint Valant       On practice device     Via email      UNSIGNED

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Guardian 1 required to sign  
 Guardian 2 required to sign  
 Guarantor required to sign  
 Other Signer required to sign  
Developing Provider: George M. Hall      UNSIGNED

Add Supervisor    Add Provider

- Checkboxes for Guardian 1, Guardian 2, and Guarantor will only appear if the patient has them entered in **Persons & Institutions | Patients**.

Check the boxes by the required signers and indicate “On practice device” or “Via email” for each required signer. If an email is already in the system for the signer, that will be pulled into the email field. The email address can be updated in this screen, but will not update the email address already in the system.

### Signers

External signer(s) required to sign

Patient required to sign  
 Mint Valant  On practice device  Via email UNSIGNED

Guardian 1 required to sign  
 Jasmine Valant  On practice device  Via email  UNSIGNED

Guardian 2 required to sign  
 Bob Guardian  On practice device  Via email  UNSIGNED

Guarantor required to sign  
 Family valant  On practice device  Via email  UNSIGNED

Other Signer required to sign  
  On practice device  Via email UNSIGNED  
 Social Worker

Developing Provider: George M. Hall UNSIGNED

Internal signers and those signing on practice device must sign before email is sent to those signing via email.

### Signers

External signer(s) required to sign

Patient: Mint Valant  On practice device  Via email UNSIGNED

Guardian 1: Jasmine Valant  On practice device  Via email  UNSIGNED

Guardian 2: Bob Guardian  On practice device  Via email  UNSIGNED

Guarantor: Family valant  On practice device  Via email  UNSIGNED

Social Worker: Other Signer  On practice device  Via email UNSIGNED

Developing Provider: George M. Hall SIGNED

"Via email" signers will be emailed automatically after all other signers have signed.

Client/Guardian Signature Header  
 Default Patient/Guardian Signature Header  
 Provider(s) Signature Header  
 Default Provider(s) Signature Header

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### Problems/Goals/Objectives/Interventions

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Patient Instructions  
 Global Comments  
 Patient/Guardian participated in the development of the treatment plan

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"Via email" signers will be emailed automatically after all other signers have signed.

If necessary, there is an option to send a reminder email.

**Signers**

External signer(s) required to sign

Patient:	Mint Valant	<input checked="" type="radio"/> On practice device	<input type="radio"/> Via email	SIGNED
Guardian 1:	Jasmine Valant	<input type="radio"/> On practice device	<input checked="" type="radio"/> Via email	UNSIGNED
Guardian 2:	Bob Guardian	<input type="radio"/> On practice device	<input checked="" type="radio"/> Via email	UNSIGNED
Guarantor:	Family valant	<input type="radio"/> On practice device	<input checked="" type="radio"/> Via email	UNSIGNED
Social Worker:	Other Signer	<input checked="" type="radio"/> On practice device	<input type="radio"/> Via email	SIGNED
Developing Provider:	George M. Hall			SIGNED

"Via email" signers will be emailed automatically after all other signers have signed.

Client/Guardian Signature Header  
Default Patient/Guardian Signature Header  
Provider(s) Signature Header  
Default Provider(s) Signature Header

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Problems/Goals/Objectives/Interventions

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[Print](#) [Edit](#) [Send Reminder Email to - Guardian 1](#) [Send Reminder Email to - Guardian 2](#) [Send Reminder Email to - Guarantor](#)

When all signing is completed, the treatment plan moves from draft to active.

**Note:** The treatment plan viewed by the signers does not include email addresses.