Using Technology to Obtain Digital Signature for Behavioral Health Services

Electronic, i.e., digital signature is an approved way of acquiring consent from individuals, both new and existing clients, receiving telehealth behavioral health services in PA, including treatment for substance use disorders, during the COVID-19 pandemic. A digital signature furthers security by requiring a PIN verification in addition to the signature, which ensures that the signer is the person associated with the signature. Two examples of digital programs that can be used for electronic signatures are noted in this document, including Adobe Signature and DocuSign. Both of these products are accessed with a smart phone, with nothing for the recipient to download. There are other options as well.

Adobe Signature

Adobe Signature website

Steps for the sender:

1. Enter the email address of the recipient.
2. Type a message to the recipient with the information.
3. Attach the document to sign.
4. Send the email.

Upon receipt, the recipient:

1. Opens the document sent through email.
2. Signs/initialed in the highlighted sections (either with a finger swipe or keyboard).
3. Submits the signature.
4. The recipient only needs access to an email address; no downloading of apps is needed.

Once the document is signed, a confirmation copy is sent to both the sender and the signer. The sender can track the status of all items sent and signed or not signed through a dashboard. There is an online demonstration of the steps needed to send and sign the document, as well as the dashboard overview.

DocuSign

DocuSign website

Steps for the sender:

1. Starts the email.
2. Upload the document.
3. Add recipients to the email.
4. Type an email message.
5. Add the signing fields to the document.
6. Send the email.

Upon receipt, the recipient:

1. Opens the document sent through email.
2. Agrees to sign the document electronically.
3. Signs the document.
4. Adopts the signature (this saves the signature information).
5. Confirm the signature.

If a recipient wants a copy of the document, then the recipient must create an account. The sender can track the status of all items sent and signed or not signed through a dashboard.