VERBAL/WRITTEN AGREEMENTS AND SIGNATURES

Due to the need for teleworking and limiting in-person meetings in response to COVID-19, staff are unable to accept written or verbal agreement in place of a signature on applications, extensions for eligibility determination, extensions for IPE development, CFP forms and IPE documents. In order to better accommodate our customers during this time this exception will be granted effective March 18, 2020 and will remain in effect until staff are able to return to work in their respective offices.

Staff must document in a case note when agreement for signature has been received, including copying and pasting any written agreement into the case note if it is received via e-mail. A signed document is still required in EDS-staff must electronically sign and date the document for the customer and add a note stating “electronically signed with verbal or written permission from customer”.

Due to the nature of Releases of information, most of these forms still require a written signature from the customer and are not included in the electronic signature exception. If you find yourself in a situation where you require a release and are unable to get a signature, please work with your supervisor to determine whether or not a verbal/written agreement is sufficient. (Example: We may be able to accept verbal agreement to communicate with a BVI, but would not be allowed to do so for a medical (ROI).

Note: An actual signature is preferable whenever possible. Please work with your customers to determine whether or not getting their signature is possible prior to resorting to this type of agreement. Consider other options for getting signatures-for example e-mailing a copy of the document, customer prints, signs and send back a phot of the document using their phone.