**Date/Version:** Effective 03.25.2020- TBD

**Purpose:** To outline the process that staff will use for obtaining client signature via verbal agreement when, during RSA approved special circumstances, LIBERA signature pad roles are removed or unavailable and alternative methods of obtaining signature as outlined in VR Policy Manual Section 2.5- Signature and Signature Date Requirements are limited.

**Frequency:** When utilization of verbal agreement as a method of obtaining signature has been approved for use by RSA Program Administrator or designee and signatures must be obtained on RSA documents such as VR Application form, IPEs, and IPE Amendments. Utilization of verbal agreement is limited and only allowable under special circumstances. The RSA Program Administrator or designee will determine the allowable start and end dates to allow verbal agreements.

**A. Signature Options during RSA Approved Special Circumstances**

1. Any document requiring signature will be signed by the person authorized to make decisions regarding the applicant/client’s VR case using one of the following methods:

a. Direct signature in ink on the document;

b. Signature via signature pad on the document;

c. Email approval attached to the document; or

d. Verbal approval (allowed only during RSA approved special circumstances).

2. Date of signature will be the date the signed document is received by staff.

a. If the document is signed in the VR office, the date of signature will be considered the date of receipt.

b. If the document is signed and mailed/faxed or otherwise sent to the VR office, the document will be date stamped upon receipt by office staff and the stamped date will be considered the date of receipt.

c. If the document is approved via email and emailed to the VR office, the date stamp on the email will be the date of receipt.

d. If the document is approved via verbal approval, the date of documented verbal approval will be the considered the date of receipt.

**B. Process Steps for Obtaining and Documenting Agreement/Signature**

1. For approvals/signatures obtained through methods A(1)(a-c), staff will follow policy as outlined in VR Policy Manual Section 2.5- Signature and Signature Date Requirements.
2. For approvals/signatures obtained verbally during RSA approved special circumstances, staff will:
   1. Contact the person authorized to make decisions regarding the applicant/client’s VR case to obtain verbal agreement/signature for any document requiring signature;
   2. Verbally review all details of the document with the individual, address any questions or concerns the individual has about the document; and
   3. Ask if the individual understands and agrees with the all details of the document.
      1. If the individual agrees with all details of the document, staff will:
         1. Inform the individual that due to special circumstances, RSA is allowing verbal agreement as a method of signature for a limited period of time and that staff will document the individual’s verbal agreement, including method of agreement (e.g. phone call) and document details, in the case file and electronically sign and date the document on behalf of the client;
         2. Electronically sign the document on behalf of the client/authorized representative by choosing/verifying the appropriate name in the document’s signature drop down menu and entering the date of verbal approval into the date field; and
         3. Provide a copy of the completed, signed document to the individual via email, mail, or in person appointment, as soon as circumstances allow.
            1. In the event a document must be mailed, and staff do not have access to office mail, staff will:

Print/save the signed document as a PDF from the Libera casefile and email it to a staff member who does have access to office mail for processing. If this method is not available, staff will:

Maintain a spreadsheet of documents that must be mailed to individuals once circumstances allow staff to have access to office mail. Staff will mail documents within 2 business days of regaining access to office mail.

* 1. Staff will document in the electronic case file details of the conversation with the individual, including the individual’s verbal agreement, method of agreement (e.g. phone call), document details and method of which a copy of the completed and signed document will be provided to the individual.