Creating Initial Electronic ID's/Signatures in Treatment Plan/Progress Report Templates
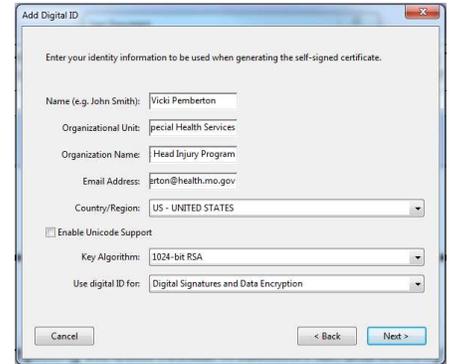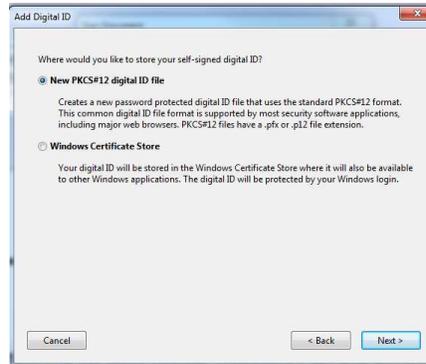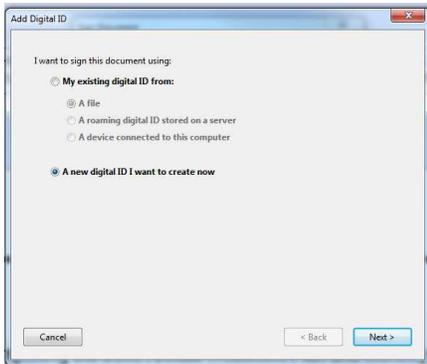
1. Left click in the Case Manager or Program Supervisor Signature field

2. Select "A new digital ID…" – Select Next

3. Default "New PKCS#12 digital file" – Select Next

4. Enter information into first 4 fields- leave default in last 3 fields – Select Next

5. Allow file to save to default location. Create/confirm password - Select Finish

6. Once finish is selected, you will be asked to enter your password. Select - Sign

7. At this time, the template requires you to save/name the new file, for example, DCN John Doe 6-12-2014. (The naming scheme of the files is up to you- just remember that you will be going back into the original file several times during the timeframe of the treatment Plan, to insert the monthly progress notes).
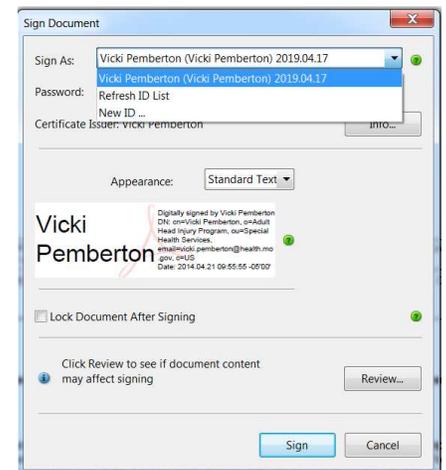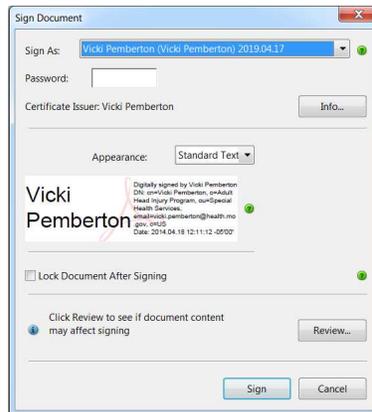
Your electronic signature will now display on the form (See below). This signature will be available for future use but will require a password to activate. If the signature needs changed at any point after a Treatment Plan form has been saved, right click in the signature block and select – Clear Signature. Left click in the signature block again and either create a new digital ID signature or choose another signature from the drop-drop listing (See right).