How to sign patient forms on Efunding

**Step 1:** First, make sure all the required fields are complete for the eval (it should state 100%):

- **SLP EVAL**
  - Demographics 100%
  - Communication Impairment 100%
  - Daily Communication Needs 100%
  - Communication Goals 100%
  - Rationale Device Selection 100%
  - Evaluation Trials 100%
  - Treatment Plan 100%

**Step 2:** Once those are complete, click into “Final Steps” on the right-hand side of the webpage:

- **FINAL STEPS**
  - Files 0%
  - Signatures 33%

**Step 3:** Next, click into “Signatures.” The webpage will look like this:

- **Final Steps - Signatures**
  - Document:
    - Client Information Form
    - Release of Benefits
    - SLP Evaluation

**Step 4:** Click the button next to the document that you are signing (for example Release of benefits) that says, “Click Here to Sign Document”.

Updated 6/4/2020 jsd
Step 5: A pop up will appear – Update the drop down to who will be signing the release, then click Sign document

Either end user, parent, spouse, legal guardian, or POA.

Who will be signing this document? Parent - JAIME DAWSON (suebpdaw@yal)
Will a witness also be signing? No

Step 6: Pop up will appear, explaining how to sign the form. Once you read it, simply click I understand, let me sign it

You aren’t done yet!

Clicking the button below will open a document that requires your signature (it will open in a new window). Clicking the icon on the left side of the document will automatically scroll to the location where you can sign.

Then click the signature field.

After signing, you must click the "Confirm" button to complete the signature process.

I understand, let me sign it
Step 7. The release will generate. Click yellow pencil

Step 8: Click “Click to Sign”
Step 9: A Signature box will appear

**Sign below**

You can either draw your signature using your mouse (or using your finger on a touchscreen), or you can type your signature with your keyboard.

[Signature drawing]

You can use your mouse to sign. Click Apply Signature

Step 10: Click confirm signature and it is now signed.

**Confirm**

You have filled out all the fields. Click the confirm button to submit the completed document.
**Step 11:** Once the confirm button is hit, you are in a new window, simply go back to the previous window, Click the refresh button for the page. You can either view the release you just signed or hit cancel to get back to the Final Steps page.

![View the document](image)

**Step 12:** Then you can either hit Save and Continue Later (if not ready to submit) or “Submit to Tobii Dynavox”:

![Submit to Tobii Dynavox](image)