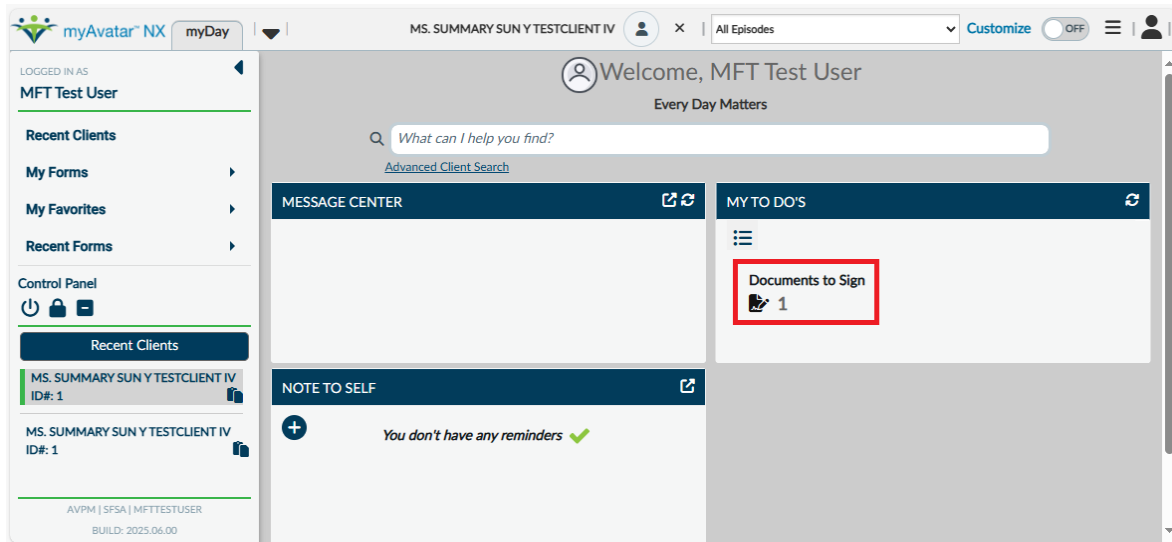


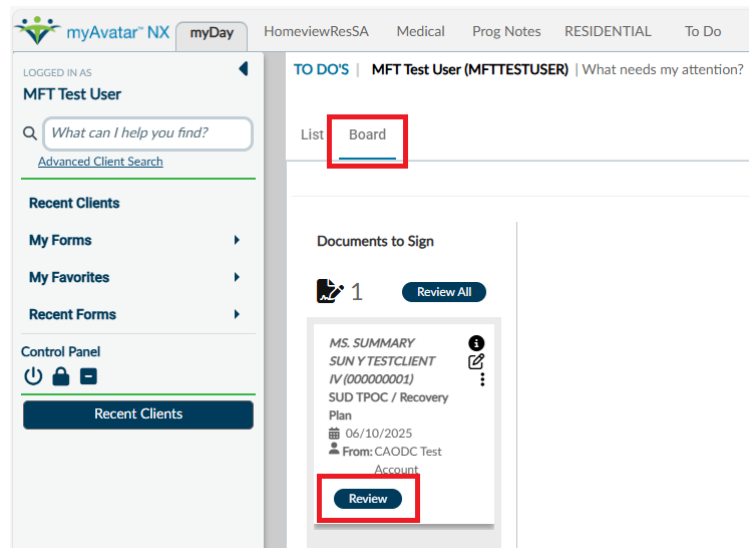
Approving/Co-Signing Documents – Reference Sheet

If you are a licensed or waived professional (e.g., AMFT, LCSW, MD, etc.), you might need to sign a document that has been routed to you by a supervisee. Documents that you need to review and approve—or reject—will appear on your My To Do's widget.



Reviewing a Document

1. Click on *Documents to Sign* on your My To Do's widget.
2. After clicking Documents to Sign, you will be presented with a List or Board view of any documents that have been routed to you. Click the *Review* button for the document you want to examine.



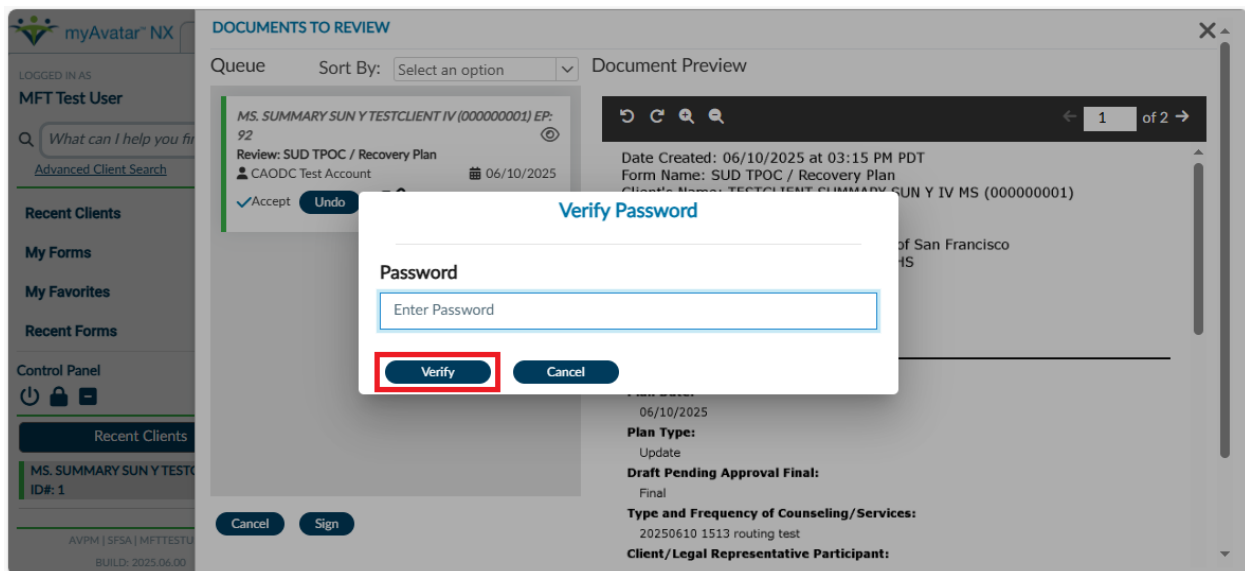
3. After clicking Review, a Documents to Review page will appear (see screenshot below). Scroll through and examine the document. After you examine the document, you have the option to Accept or Reject it. (If you click *Cancel* on the Documents to Review page, you will return to the previous screen.)

Rejecting a Document

1. If you review a document and determine that changes need to be made before you can approve and sign it, you can return it to Draft using the *Reject* button.
2. After clicking Reject, you will be prompted to enter comments to inform the author of the changes that need to be made.
3. After entering your comments, click anywhere outside of the comments field to enable the Sign button.
4. Click the *Sign* button to return to document to Draft so that your supervisee can make the requested corrections and then route it back to you for approval. (The returned document will appear on your supervisee's My To Do's widget.)

Approving a Document

1. If you review a document and determine that no changes need to be made, click the *Accept* button.
2. Click the *Sign* button.
3. After clicking Sign, you will be prompted to enter your password. Enter your password and click the *Verify* button to approve and finalize the document.



Questions/Support

If you have questions or need support with document routing, contact the Avatar Help Desk at 628-217-5196.