

Telephonic, Electronic, Verbal Signatures

The following outlines the ways in which counties may accept a telephonic or electronic signature when a patient is submitting Medi-Cal forms (e.g. Authorized Representative forms). Additionally, the Department of Health Care Services has provided temporary flexibility guidance for Hospital Presumptive Eligibility (HPE) providers to limit exposure of COVID-19.

Links to Guidance

ACWDL [19-17](#) – Telephonic or Electronic Signature Capability for Medi-Cal forms, 06/21/19

Outlines the ways in which counties may accept a telephonic or electronic signature when speaking to the applicant over the phone.

Department of Health Care Services Guidance:

[Hospital Presumptive Eligibility Flexibilities](#) (NewsFlash/Announcement 4/02/2020)

[Hospital Presumptive Eligibility Webpage](#) (includes guidance on flexibilities)

[Presumptive Eligibility for Pregnant Women Flexibilities](#) (NewFlash/Announcement, 4/02/2020)

Medi-Cal Applications/Forms:

Electronic Signatures - An electronic sound, symbol, or process attached to or logically associated with an electronic record and executed or adopted by a person with the intent to sign the electronic record (The Uniform Electronic Transactions Act, [California Civil Code Section 1633.2](#)). A “[digital signature](#)” is a type of electronic signature.

OPTIONS:

- Digitized image of a handwritten signature that is attached to an electronic record
- **Electronic Text Signature Solution** - The electronic text solution consists of sending a text to the applicant, beneficiary, or AR with a unique code. The applicant/beneficiary replies to the text and provides the unique code in order to affirm their electronic signature.
- **Electronic Email Signature Solution** - The electronic email solution consists of sending an encrypted email to the applicant, beneficiary, or AR with a link that directs them to a website where they can provide unique information to affirm their electronic signature.
- **Electronic Interactive Voice Response (IVR) Signature Solution** - The IVR solution consists of providing the applicant, beneficiary, or AR with a telephone number they can call where they can provide unique information to affirm their electronic signature.

<ul style="list-style-type: none">• Electronic Signatures Obtained by Having the Applicant, Beneficiary, or AR log into their Statewide Automated Welfare System (SAWS) Account.
EXAMPLES:
<ul style="list-style-type: none">• Email the application/form to the applicant to sign, scan and return• Handwritten signature input onto an electronic signature pad

Telephonic Signatures - Audio recording that can be stored in the county’s case record and retrieved upon request.

OPTIONS:
<ul style="list-style-type: none">• Recording the entire telephone process with the signature included; or• Recording only the signature portion of each telephone call.
EXAMPLES:
<ul style="list-style-type: none">• File a SAWS1 application, anyone can file on another’s behalf if they are aware of the need for medical coverage ; the County will follow up and call the patient to obtain additional information that is needed and will capture telephonic signature over the phone• If the patient cannot sign the application (SAWS2Plus), it can be submitted via email to the HOPE POD. A worker can call the patient and capture the telephonic signature

Hospital Presumptive Eligibility Flexibilities:

Verbal Authorization (also considered as Telephonic Signature) – Authorization or consent is given verbally
IMPORTANT: *As of April 4,2020, DHCS has issued guidance on immediate, temporary flexibilities for Hospital Presumptive Eligibility (HPE) providers in order to limit potential exposure to COVID-19.*

PROCESS
HPE Enrolling Providers can utilize telephonic signatures for HPE Applications, noting in the case file “COVID-19 protocol. 1. Read the consent language aloud to the individual/Authorized Representative as it is stated on the signature page of the HPE Application: By signing, I declare that what I say below is true and correct.

- I have read and understood this HPE Medi-Cal Application.
 - The information I provided is true, correct, and complete.
 - I understand that I must complete and submit the insurance affordability application by the end of my PE period in order to be eligible for continued coverage.
 - I have received the insurance affordability application.
2. Ask that the individual/Authorized Representative ***verbally acknowledge their consent***
 3. In the signature line, type “Verbal consent – COVID-19”
 4. Be sure to document and keep documentation for all verbal consent obtained

Presumptive Eligibility Flexibilities for Pregnant Women:

Verbal Authorization (also considered as Telephonic Signature) – Authorization or consent is given verbally

PROCESS

1. Read the consent language aloud to the individual/Authorized Representative as it is stated on the signature page of the PE4PW Application:
By signing, I declare that what I say below is true and correct.
 - I have read and understood this HPE Medi-Cal Application.
 - The information I provided is true, correct, and complete.
 - I understand that I must complete and submit the insurance affordability application by the end of my PE period in order to be eligible for continued coverage.
 - I have received the insurance affordability application.
2. Ask that the individual/Authorized Representative verbally acknowledge their consent.
3. In the signature line, type “Verbal consent – COVID-19.”
4. Be sure to document and keep documentation for all verbal consent obtained.