

**TITLE: E-Signature Process**

**DATE: September 4, 2018**

**NUMBER OF SPEAKERS: 1**

**TRANSCRIPTS STYLE: Verbatim**

**FILE DURATION: 5:52 minutes**

## [E-Signature Transcript](#)

Hello again, this is Sandy Jones, welcome to a new in context tutorial. On this tutorial video, we are going to learn how to complete the Signature social form on a PAVE Portal Application.

Before we get started, it is important that you take a minute to review the NPI type that you are using for your application. If the type of NPI of your application is a Type 1 NPI or Individual, then you need to follow the in-context tutorial section named: E-signing a type 1 NPI application

If the NPI of your application is a Type 2 NPI or Organization NPI, then you need to follow the section of this tutorial named: E-Signature for a type 2 NPI Application.

Let's start this tutorial, **E-signing an application associated with a type 1 NPI.**

If you are trying to complete the E-Signature section of an application which is associated with a Type 1 NPI, first make sure you are on the Business Profile of this "individual" that the NPI belongs to.

Remember all individuals need their own Business Profile. There is one exception to this rule - if the individual is an incorporated individual. This means if this individual holds a Type 1 and a type 2 NPI, and he is enrolling or is enrolled in Medi-Cal as an Incorporated Individual, in this case, the incorporated individual only needs one Business Profile, where both their Type 1 and Type 2 need to be. Besides this exemption every other individual needs a Business Profile for their NPI type 1.

In this example, Kendra is a rendering provider who has been requested to be affiliated with a Group. Kendra needs to E-Sign the Rendering Signature portion of the affiliation application.

Kendra has sign up into PAVE with her email address and a password she established. Then she had logged in PAVE and created the Business Profile for her NPI 1689160988. Once she had accepted the affiliation, she can complete the Rendering Signature social form.

All individual applications contain the Profile Information form. This social form contains information related to the individual such as: Legal Name, SSN, Date of Birth, Driver's License and other important information.

The First Name and Last Name along with the SSN and Date of Birth are the most important fields used on the E-signature validation.

When Kendra created her signed up on PAVE, she entered a First Name and Last Name. Because Kendra is the "applicant" provider, she also had entered a First Name and Last Name on the Profile information form of her Affiliation application. The values entered on the Profile information need to exactly match the First Name and Last Name Kendra is providing when she signed on PAVE. This is a very important step because if there is not a match, Kendra will be seeing a "Restriction" page explaining this.

The next important detail to consider is Kendra's user privilege. Since Kendra created her Business Profile she had the Administrator privileges, but if someone on Kendra's office had set up the Business Profile on behalf of Kendra, and then had invited Kendra to be part of this Business Profile, Kendra must have a role of an Administrator, Manager or Authorized Signer so when she logs in and tries to complete the E-signature she won't see the "Restriction" page.

Once you had verified the above two items, at this point you will not longer see the restriction page. You will be able to see and complete the Declarations Page, which is the first section of the E-Signature sub-form.

The next section is the E-signature section, in here you will need to enter the last four digits of the SSN and the year of birth as part of the individual signature. So, in this example, Kendra had logged in and entered this information including her password used to logged in into PAVE.

The data entered here will be verified with the SSN and Date of Birth entered on the Profile information for Kendra, if there is a match your section will be marked as completed and you will the summary page.

If there is not a match, you will see a red warning. Make sure you review completely the profile information section, and then re-enter on the E-signature the last 4 digits of SSN, the year of birth and the password.

Once you have completed this, PAVE Portal will store the SSN and Year of Birth provided by Kendra under her user settings. So next time Kendra is affiliating with other group and needs to E-sign an application those stored values will be used as part of the verification as well.

All applications created with a Type 1 NPI, follow the flow described above.

### **E-signing an application associated with a Type 2 NPI**

For applications created with a Type 2 NPI, one of the first things you need to verify is that under the Owner/Control interest you have disclosed all the individual's owners/partners, control interest person including the person who has authorized signatory rights and can sign on behalf of the group or Organization.

In this example, Monica Louis is an owner of the Group and is disclosed under the Owner/Control interest social form.

If the individual that needs to E-sign this application is not yet part of the Owner/Control interest form, you need to disclose it and complete all the required information before these individual tries to E-sign this application.

Since Monica is disclosed as part of the Owner/control interest form, and Monica is also a user with Administrator privileges on the Business Profile where this Group application is, when she logs into PAVE with her userID and password and logs into the Business Profile where the application she needs to E-sign is, she won't see any restriction page.

Monica can now complete the Declarations page and the E-Signature section, remember that the last 4 digits of her SSN and her year of birth need to match what has been disclosed on the Owner/control interest form.

If there is not a match, you will see a red warning. Make sure you review completely the Owner/Control Interest form and then try again re-entering the last 4 digits of SSN, Year of birth and password.

END TRANSCRIPT