

How to Use the Co-sign feature

Jay-Ileen (Ai) - 2025-03-20 - [VSee Clinic for Providers](#)

How the Primary Provider Requests Co-sign

To send a co-sign request, you need to complete the SOAP Notes first.

1. Go to the **Notes** tab on the Patient page.
2. Complete the SOAP Notes fields.
3. Click **Sign & Send**.

The screenshot shows the VSee health patient page for Brianna Anne Williams. The status is 'Completed' and 'Non-urgent (Minor)'. The 'Notes' tab is selected and highlighted with a red box and a red circle with the number 1. The main content area is outlined with a red box and a red circle with the number 2. At the bottom right, the 'Sign & Send' button is highlighted with a red box and a red circle with the number 3. The page includes a search bar, a table with columns for Name, Quantity, Dispensings, Directions, Date, Prescriber / Pharmacy, and Status, and an 'Uploaded Files' section with a 'Drag and Drop files here' area and a 'Browse files' link.

Status: Completed Non-urgent (Minor)

Brianna Anne Williams Offline

Demographics Intake **Notes** Payment Visits Problem list Health Medical History Allergies Medications Documents

Memo

Search:

Name	Quantity	Dispensings	Directions	Date	Prescriber / Pharmacy	Status
No Items						

Showing 0 to 0 of 0 entries

Preferred Pharmacy [Edit](#)

Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext, Petaluma, CA, 94954, 7079845571

Uploaded Files (optional)

Drag and Drop files here

Or Browse files

Save as Save **Sign & Send**

Open cs1.png



You will then see the “Request Co-Sign” button.

1. Click on **Request Co-Sign**.

Status: Completed Non-urgent (Minor) ...

Brianna Anne Williams Offline

Demographics Intake **Notes** Payment Visits Problem list Health Medical History Allergies Medications Documents

Memo

Notes

CPT Codes

Codes	Qty	Modifiers	DX
99024 - FINE NDLE ASPIR; W/O IMAGING GUID - \$495	1		Z09 - Encounter for follow-up examination after completed treatment for conditions other than malignant neoplasm

Notes

Plan/Care Instructions

Uploaded Files
no file uploaded

Signed by Dr. Sarah Bays, M.D. at 03/19/2025 10:40 AM

Open cs2.png

A pop-up window will appear.

1. Select from the dropdown list the Provider you want to request co-signature with.

Note: Only Providers who are added to the same clinic room as yours will appear on the dropdown list.

1. Click **Request Co-Sign**.

Visual Exams
no file uploaded

ICD Codes

Codes

Z09 - Encounter for follow-up examination after completed treatment for conditions other than malignant neoplasm

Notes

CPT Codes

Codes	Qty	Modifiers	DX
99024 - FINE NDLE ASPIR; W/O IMAGING GUID - \$495	1		Z09 - Encounter for follow-up examination after completed treatment for conditions other than malignant neoplasm

Notes

Plan/Care Instructions

Uploaded Files
no file uploaded

Signed by Dr. Sarah Bays, M.D. at 03/19/2025 10:40 AM

Edit

Request Co-Sign

Open cs3.png



The selected provider will receive an email/SMS of the co-sign request.

Below your date and time stamp will show a confirmation that the co-sign request was sent to the selected provider.

Status: Completed Non-urgent (Minor)

Brianna Anne Williams Offline

Demographics Intake **Notes** Payment Visits Problem list Health Medical History Allergies Medications Documents

Memo

IMAGING GUID - \$495	1	conditions other than malignant neoplasm
----------------------	---	--

Notes

Plan/Care Instructions

Uploaded Files
no file uploaded

Signed by Dr. Sarah Bays, M.D. at 03/19/2025 10:40 AM
Co-sign request sent to Andrew Miller by Dr. Sarah Bays, M.D. at 03/19/2025 10:42 AM

[Edit](#) [Co-Sign requested](#)

You will also see on the Reminder field of your Dashboard tab the status of the co-sign request if it is still pending.

Ready for Visits Oldest

There are no patients waiting at this time.
[Invite Patients](#)

[Invite Patient](#) [Schedule](#)

Today's Schedule
No appointments at this time.

E-Consult
No E-Consults at this time.

Reminder

- Aileen White**
Visit ID #1001409887
Pending notes
- Aileen White**
Visit ID #1001409883
Pending co-sign
- Brianna Anne Williams**
Visit ID #1001389538
Pending co-sign

[Show more](#)

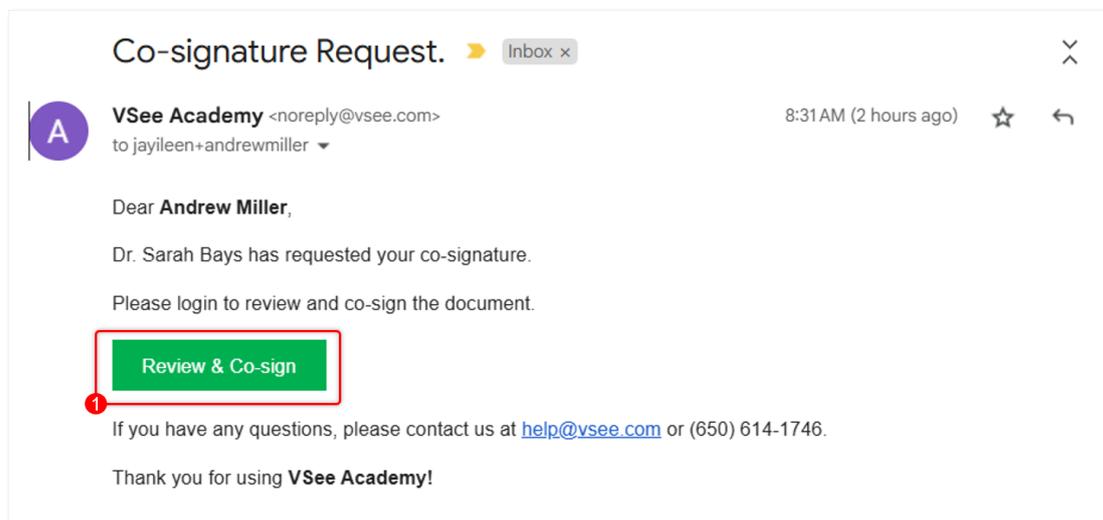
Open cs6.png



How the Co-Signer Provider Accepts the Request

Once a Primary Provider sends a co-sign request, the selected co-signer provider will receive an email/SMS notification about it.

1. Click on **Review & Co-sign**.

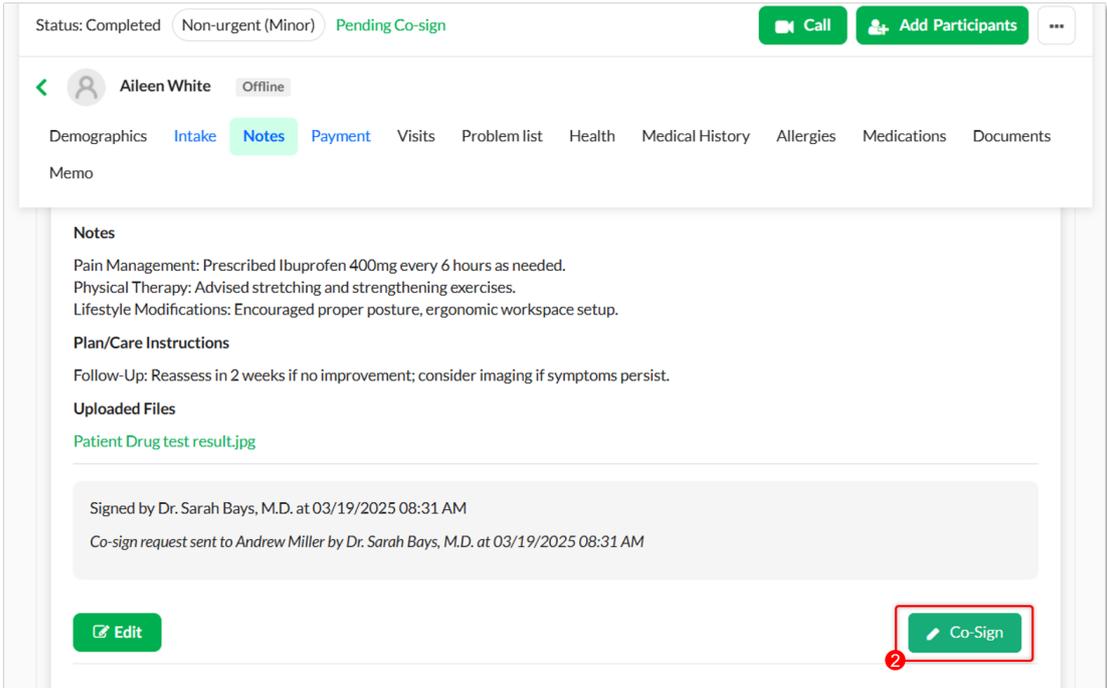


You will be routed to the login page if you have not logged in to your VSee Clinic yet.

 Open cs7.png

After clicking on the link (and logging in), you will be routed to the patient visit page and directly to the bottom of the Notes tab.

1. Click the **Co-Sign** button.



Status: Completed Non-urgent (Minor) Pending Co-sign Call Add Participants ...

<  Aileen White Offline

Demographics Intake **Notes** Payment Visits Problem list Health Medical History Allergies Medications Documents

Memo

Notes

Pain Management: Prescribed Ibuprofen 400mg every 6 hours as needed.
Physical Therapy: Advised stretching and strengthening exercises.
Lifestyle Modifications: Encouraged proper posture, ergonomic workspace setup.

Plan/Care Instructions

Follow-Up: Reassess in 2 weeks if no improvement; consider imaging if symptoms persist.

Uploaded Files

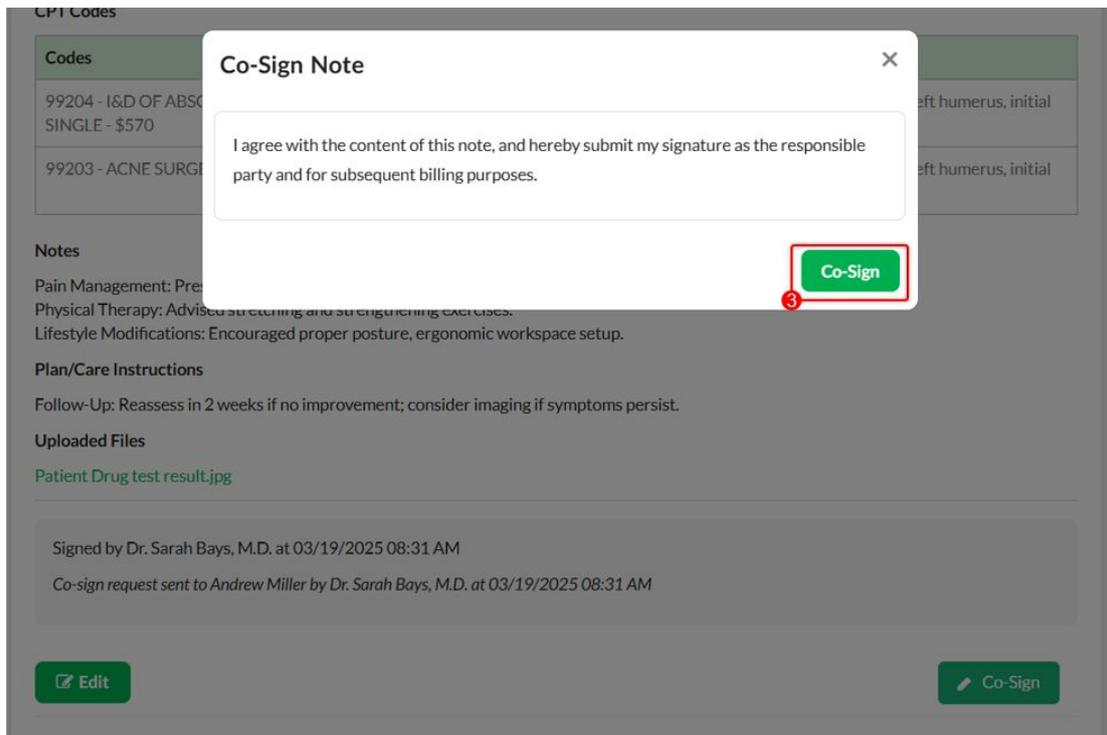
Patient Drug test result.jpg

Signed by Dr. Sarah Bays, M.D. at 03/19/2025 08:31 AM
Co-sign request sent to Andrew Miller by Dr. Sarah Bays, M.D. at 03/19/2025 08:31 AM

Edit Co-Sign

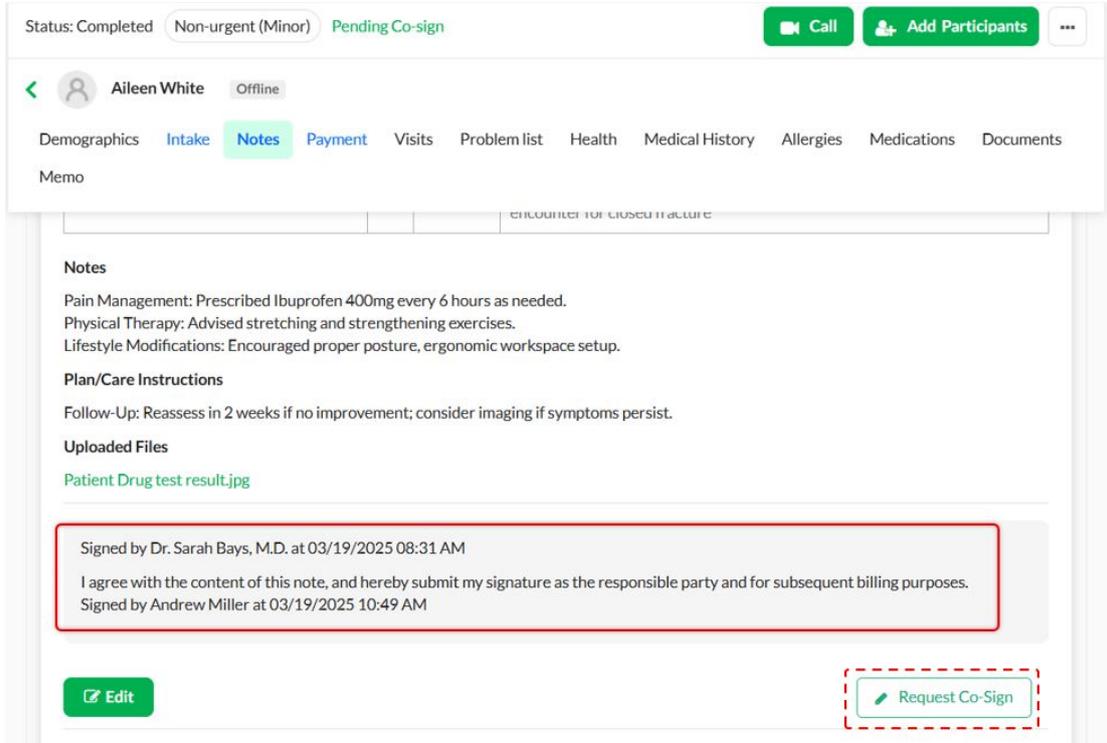
 Open cs8.png

1. A pop-up window will appear. Confirm and click on **Co-Sign**.



Below your name, date, and time stamp will show a confirmation that the chosen Provider will

*Note: You can also click on the **Request Co-Sign** button again to continue sending co-sign requests to other Providers.*



Open cs10.JPG



Note: Please reach out to your Account Manager if you'd like to enable this feature in your Clinic.

Need more assistance? Send us an email at help@vsee.com or check out the [Help](#) section under the Profile Menu of your VSee Clinic.

- [Tags](#)
- [cosign](#)
- [cosigning](#)