

ClinicOffice E-Sign

One challenge with going paperless is how to record legally acceptable signatures? ClinicOffice assists with this by allowing you to create and store PDF documents that have been digitally signed using our E-Sign feature.

In order to use our **ClinicOffice E-Sign** service, you need the following :-

- ClinicOffice (obviously!)
- The **Documents Module** add-on
- *Either* a **Hosted** account, or the ClinicOffice **Support Plan**
- A touchscreen device such as a tablet, preferably with a 10" screen

Please click the link below to find out more about the benefits of **E-Sign** and the required specifications of your tablet device: <https://pioneersoftware.co.uk/co-esign>

In the first section of this document we'll discuss how to setup an E-Sign document template in ClinicOffice, and then in the second section we'll see how to capture a client's signature.

[1] Making a Document E-Sign Compatible

1. In ClinicOffice go to the **Reports and Templates** section
 - a. *Right-click* on a Letter Template (e.g. "Letter to Patient") that you wish to use as a basis for the new E-Sign document and click **Copy**
 - b. This creates a copy e.g. "Letter to Patient (copy 1)". *Right-click* on that copied template and click **Rename** to give it a new name (e.g. "Patient Consent")
 - c. Now *right-click* your new Letter Template and click **Edit Template**
2. In the document itself, *left-click* to place the cursor on the spot where you wish the signature to be inserted
3. Go to the **INSERT** tab (at the top) and click the **Signature Point** button

You will now see the text **SIGN HERE** inserted into your document. You can insert more than one signature point into the document if required.

Once you've finished, click the **Save Template** button and close the document editor.

[2] Capturing a Client's Signature

1. Launch the web browser on your tablet (or other touch screen device which will be used for the signing)
2. Go to the following website: <https://esign.pioneersoftware.co.uk>
3. Back in ClinicOffice, create the E-Sign document by merging your Letter Template with a patient record. The recommended way to do this is :-
 - a. Open a patient record and click the **Print** button (at the top)
 - b. Select the document template (e.g. "Patient Consent") created in section [1]
 - c. This will open the document and merge in the patient's details

NOTE: Letter Templates can be merged with multiple patient records, however when creating an E-Sign document which is to be signed by ONE person, you obviously only want ONE patient record. Using the PRINT button in the patient record (as described above) ensures that only one patient record is merged into the template.

Once the document has been generated, click the **Send to E-Sign** button on the ribbon bar at the top. A message will now appear providing you with your Customer Reference and the Document ID (see below).



4. Returning to your tablet, enter in the Customer Reference and Document ID into the E-Sign website and click the **Retrieve Document** button
5. The document should now appear and you can hand the device over the client
6. If they're happy to sign it, then they should :-
 - a. Make sure their name appears correctly in the box at the bottom of the screen (if it's incorrect, they can tap on it to correct it)
 - b. Use their finger (or stylus of the device has one) to sign their name in the box. If they make a mistake or the signature is inadequate, they can click the Clear button to start again
 - c. Click the **SIGN** button to insert their signature into the document
 - d. (If there are multiple signatures required, step (c) will need to repeated)



7. Finally, they can click the **FINISH** button and hand back the device

NOTE: If the document has multiple signature points, then the patient will need to click the **SIGN** button more than once to reflect each signature. For example, if it's a 2-page document with signature points at the bottom of each page, the patient will to press **SIGN** twice before being able to press the **FINISH** button.

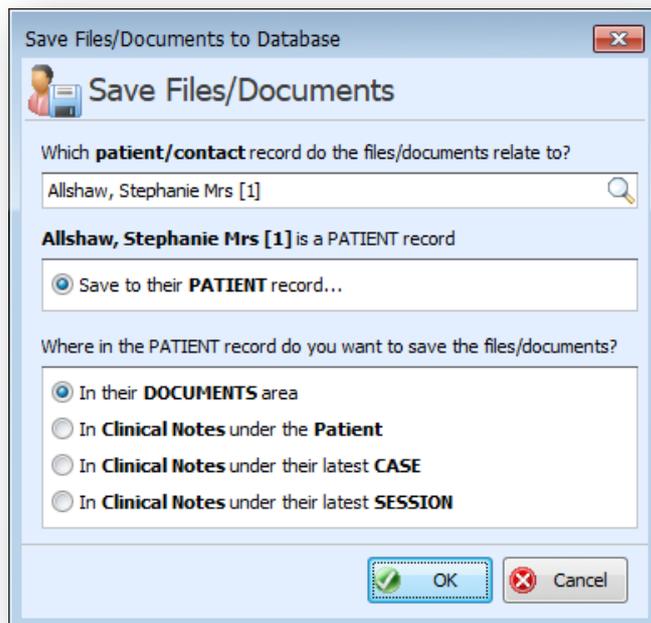
Once the document has been signed, a popup notification message will appear in ClinicOffice (at the bottom right).

You can click the **Open Signed Document** (📄) button on the popup notification to view the signed document.



The last step is to **SAVE** the signed document for safe-keeping. To do this, either click the **Save in Database** option (to save the document in your ClinicOffice database), or the **Save As** button to save it elsewhere on your hard disk.

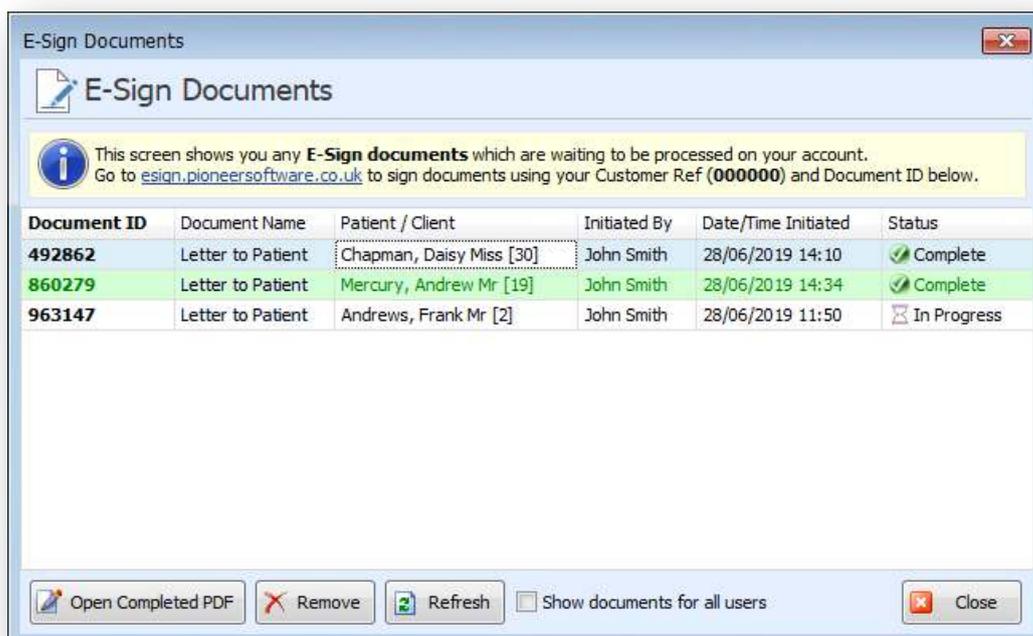
If you elect to “**Save in Database**” then you can select where exactly the document should be saved within ClinicOffice. For example, it can be stored in the patient’s “**Documents**” area or attached to their Clinical Notes.



The E-Sign Manager

To invoke the E-Sign Manager in ClinicOffice, click the lower-half of the **Patients** button on the HOME bar (at the top of the main screen) and then click **E-Sign Manager**.

This screen shows all **E-Sign documents** which are either waiting to be signed or which have been completed. You can also see all the document IDs here too, which is useful if you accidentally closed the box showing the Document ID before entering it on your tablet!



NOTE: Once a document has been saved in your ClinicOffice database, it will automatically be removed from the above E-Sign manager screen. You can also manually remove documents from there by clicking the **Remove** button.