

e-Signature Quick Reference Guide



Viewing, editing and signing documents

Please contact Hilary Bergquist for questions, assistance or eSignature training

Email: hbergquist@phsa.ca Phone: 604-953-5015 x 767165

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C&W PC LOGIN	
For first time login to any C&W PC used for E-Signature, set word macro security setting to low	(1) Open MS Word on your local pc. (2) Select 'Tools', 'Options', 'Security', and 'Macro Security' (3) Select 'Low' and click on OK. (4) Click on OK.

OPEN ACTION LIST		
WHERE	HOW	DETAIL
Desktop ICON Inquiry Action List.Ink	1 Double click on Inquiry Action List Icon . 2 Click on File → Open → Action List . 3 Enter your user name and password. 4 Click OK .	1 Opens program. 2 A ✓ by Action List indicates items in the action list. 3 User name and action list name auto-fill. 4 Action list opens on the ITEMS tab.

OPEN TRANSCRIBED DOCUMENT		
WHERE	HOW	DETAIL
ITEMS tab	(1) Double click on the item representing the transcribed document. Or: (2) Select document in the ITEMS tab, and click on the DOCUMENT tab (3) Review the document for content and 'cc' listing(s).	(1) List of items in action list appears. (2) Document displays in Transcription Text (plain). (3) If no edits are required, see next section "e-SIGN A TRANSCRIBED DOCUMENT". (4) If edits are required, see "EDIT CONTENT..."

MAKE CHANGES TO THE cc'd RECIPIENTS OF A TRANSCRIBED DOCUMENT PRIOR TO e-SIGNING		
WHERE	HOW	DETAIL
	<p>PRIOR TO SIGNING DOCUMENT:</p> <p>To Add A Physician Who is In Database:</p> (1) Click on the Add button within the 'cc' physician box (2) Enter MSC or Physician name in the physician search box. (3) Double click on the desired name/address from the listing. (4) Click Sync_Doc to embed the added name in the "c" field within the document. NOTE: Distribution changes will not occur if Sync_Doc is omitted. <p>To Delete A Physician Name:</p> (1) Highlight physician name/address name for deletion in 'cc' physician box. Click on Del (2) Click on Sync_Doc to remove the name in the "c" field within the document. NOTE: Distribution changes will not occur if Sync_Doc is omitted. <p>To Add A Recipient Who is NOT in Database:</p> (1) Click on "Edit in Word". (2) Type an uppercase 'C' after the transcribed date and key in the name of the recipient. NOTE: DO NOT key in the name in the lowercase "c" field as this will not be picked up for automated distribution. (3) Save and close document.	<ul style="list-style-type: none"> • Once signed, documents will be distributed according to the name/address listed in the 'cc' physician section. • Small 'c': The recipients listed with a lowercase 'c' will be noted for automatic distribution. • Large 'C': The recipients listed with an uppercase 'C' will be noted for manual distribution. • For edits, use the Add/Del buttons within the 'cc' physician box. DO NOT type a physician name within the lowercase "c" field within the document for changes.

EDIT CONTENT OF A TRANSCRIBED DOCUMENT PRIOR TO e-SIGNING		
WHERE	HOW	DETAIL
	(1) MS Word is used to make edits. (2) Click on Edit in Word (current document will open MS Word) or check the box <input type="checkbox"/> (this and all next documents will open in MS Word (default setting). (3) Complete edits. (4) Save and close document. (5) Confirm changes : Answer Yes to Save Edits (6) Word closes and document displays in Transcription Text. (7) Click on the Sign or Sign + Next box to sign.	(1) Do not insert symbols from the symbol table. Symbols will not display in EVE. (2) RESIDENTS: Verify or Verify & Next present instead of Sign . On completion of Verify complete the prompt for entry of the "signing physician". Select physician name. Click Route .

e-SIGN A TRANSCRIBED DOCUMENT		
WHERE	HOW	DETAIL
DOCUMENT tab	(1) If no edits are required to content or 'cc' listing(s), click on the Sign box to finalize the document. IMPORTANT NOTE: Once electronically signed the document is locked and a dictated addendum is required for changes to this document. (See dictation instructions for further detail).	(1) The required action for the item displays in a box outlined in red in the upper right hand corner of the document window (e.g. Sign , Verify). (2) The button, Sign + Next will appear if there is more than one item in your action list. Selecting this action finalizes the current document and moves to the next item in the action list.

ROUTING DOCUMENTS TO OTHER DESTINATIONS		
RESPOND TO EXISTING: Routing a document for others to act upon *REMOVES THE DOCUMENT FROM YOUR ACTION LIST*		
WHERE	HOW	DETAIL
ROUTE tab	Do NOT sign document. (1) From the ITEMS tab, highlight the item representing the transcribed document and click on the ROUTE tab (2) Double click on the red bar to display menu options for "Respond to Existing" (3) Select appropriate response routing option (see most commonly used routes below). (4) A new routing item will be generated.	(1) The routing history will display on the left side of the screen. (2) A red bar in the Response field indicates the requested action has not been completed. (3) Some route destinations auto-fill. While others are selectable. See examples below for selecting the correct destination. Include comments as relevant.
DESCRIPTION	RESPONSE	DESTINATION
Transcription received in error	(1) Select "wrong destination" (2) Enter comments if necessary and press tab button once (3) Click on "Route"	(1) A new destination will auto-fill to: Transcription
Problem found (eg: Pt demographic data incorrect, headers, etc.)	(1) Select "problem found" (2) Enter comments if necessary and press tab button once (3) Click on "Route"	(1) A new destination will auto-fill to: Transcription

PRINTING	
ITEMS	From the Item Tab: <ul style="list-style-type: none"> Highlight single line item representing the transcribed document OR Highlight multiple items by blocking (hold Shift Key, click on first and last item) or selecting (hold Control key, and click on individual line items). Right mouse click and select print "Print". Document prints in transcription text.

PASSWORD RE-ENTRY	
	Re-entry of the password is required after 10 minutes of inactivity.

Troubleshooting Tips!

Action List: If you are unable to open your action list, check to make sure that you've opened the Inq Action List icon and not Inq_Pat icon.

Login & Password: If you're experiencing difficulty with your network login or password, call the IMIT Helpdesk at 604-675-4299 and ask them to reset your Windows password.

Error message when editing: If you're working on a PC other than one you've used before and you get an error message while editing your document, your Macro Security Setting may be set incorrectly. Close your action list and refer to the top of page 1 and follow the steps under C&W PC Login.