

CARE4 MODULE NAME: WEB Acute/ED

Sign List – Reviewing/Signing Documents in Draft or iSigned Status

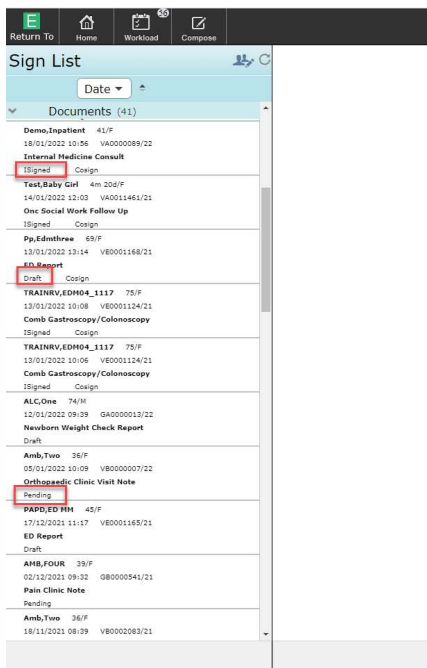
The purpose of this tip sheet is to provide instructions on the process of reviewing the process of using the Sign List to review documents in Draft or iSigned status. Furthermore, this tip sheet will provide instructions on how to complete or delete a document that is in Draft status and sign a document in iSigned status or remove yourself as a signer from a document in iSigned status.

NOTE: Users should be reviewing their Sign List to ensure that documents are Signed. Failure to do this will prevent the patient's document from being distributed to their family physicians, referring physicians and Connecting Ontario.

1. To access the Sign List users can click the Sign button on the black navigation tool bar once they have launched into Web Acute, Web ED or Web AMB. The Sign List will automatically launch if the user has outstanding reports or verbal/telephone orders that require a signature. Outstanding Orders is pass 3 days and Outstanding Report is pass 7 days.



2. From the Sign List users will see documents in Draft, iSign or Pending Status



Document Status Definitions:

iSigned documents: indicate that you as a user contributed towards the document or you were added by another user as a signer of the document.

Draft documents: indicate that a document was initiated for the patient but has not been completed or signed.

Pending documents: indicate that a document was opened but has not been saved into a draft status. Document has not been completed or signed.

3. Reviewing documents in iSigned status from the Sign List
 - a. Clicking on the patient's name will give you a preview of the document
 - b. You have the option to Sign (Submit button), Edit the document or Edit Signers/CC's

Sign List

Documents (41)

- Draft
- Cosign
- Demo, Inpatient 41/F** (Selected)
- 24/01/2022 08:53 VA0000089/22
- Admission Note
- iSigned
- Cosign
- TRAINCG,EDM02_0111 76/F
- 20/01/2022 12:26 MB0000037/22
- ED Report
- Draft
- Cosign
- Demo, Inpatient 41/F
- 18/01/2022 10:56 VA0000089/22
- Internal Medicine Consult
- iSigned
- Cosign
- Test, Baby Girl 4m 20d/F
- 14/01/2022 12:03 VA0011461/21
- Onc Social Work Follow Up
- iSigned
- Cosign
- Pp, Edmthree 69/F
- 13/01/2022 13:14 VE0001168/21
- ED Report
- Draft
- Cosign
- TRAINRV,EDM04_1117 75/F
- 13/01/2022 10:08 VE0001124/21
- Comb Gastroscopy/Colonoscopy
- iSigned
- Cosign
- TRAINRV,EDM04_1117 75/F
- 13/01/2022 10:08 VE0001124/21
- Comb Gastroscopy/Colonoscopy
- iSigned
- Cosign
- ALC, One 74/M
- 12/01/2022 09:39 GA0000013/22
- Newborn Weight Check Report
- Draft
- Cosign
- Amh, Two 36/F
- 05/01/2022 10:09 VB0000007/22
- Orthopaedic Clinic Visit Note
- Pending
- PAPD, ED MM 40/F
- 17/12/2022 11:07 VE0001169/21

Demo, Inpatient
41 F 26/07/1980 ADM IN

Preview

** TEST ** Care4

Admission Note

Patient Name: Demo, Inpatient
Date of Birth: 26/07/1980
Attending Provider: Ma, Maria
Date: 24/01/2022 08:51

Medical Record Number: V000001047
Patient Status: Inpatient
Account Number: VA0000089/22
Initialization Date: 24/01/2022 08:51

Additional CC's:
DR Andre Valentin Bedard

Admission Note
-<Maria Ma, MD - Last Filed: 24/01/2022 08:54>
testing the deleting function when two signers are on the report. This is Maria typing.
This is now Paul adding a report. Paul has not signed the document and you can still Cancel this document.
Maria is now signing the document.

-<Paul Matos, INF - Last Filed: 24/01/2022 09:00>
testing the deleting function when two signers are on the report. This is Maria typing.
This is now Paul adding a report. Paul has not signed the document and you can still Cancel this document.
Maria is now signing the document.

This is Paul now writing on the document and since Maria has signed the document you can't cancel the document anymore.

** Electronically signed by Maria Ma, MD on 24/01/2022 08:54 **

Buttons: Edit, Edit Signers/CC's, Submit

- c. To sign off on a document click the Submit button. Users can select multiple documents to sign all at one time.

Sign List

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- Internal Medicine Consult
- iSigned
- Cosign
- Test, Baby Girl 4m 20d/F
- 14/01/2022 12:03 VA0011461/21
- Onc Social Work Follow Up
- iSigned
- Cosign
- Pp, Edmthree 69/F
- 13/01/2022 13:14 VE0001168/21
- ED Report
- Draft
- Cosign
- TRAINRV,EDM04_1117 75/F
- 13/01/2022 10:08 VE0001124/21
- Comb Gastroscopy/Colonoscopy
- iSigned
- Cosign
- TRAINRV,EDM04_1117 75/F

Review and Sign

Document	Date	Patient	Status	Action
ED Report	20/01/2022 12:26	TRAINCG,EDM02_0111 76/F	Cosign	Enter PIN
ED Report	07/11/2021 16:42	Demo, Inpatient 41/F	Cosign	
Admission Note	24/01/2022 08:53	Demo, Inpatient 41/F	Cosign	
Comb Gastroscopy/Colonoscopy	13/01/2022 10:08	TRAINRV,EDM04_1117 75/F	Cosign	
Onc Social Work Follow Up	14/01/2022 12:03	Test, Baby Girl 4m 20d/F	Cosign	
Internal Medicine Consult	18/01/2022 10:56	Demo, Inpatient 41/F	Cosign	

Buttons: Edit, Edit Signers/CC's, Submit

- d. If a user has contributed to the document and wants to edit the document before signing, they can click the Edit button. This will launch the document in the document routine and allows the user to ability to edit their documentation.

Buttons: Edit, Edit Signers/CC's, Submit

Note: If a user did not previously contribute to the document and clicks Edit they will now become a cosigner of the document and will not be able to remove themselves as a cosigner

- e. If a user did not contribute to the document and hasn't entered the document they can remove themselves as a cosigner by clicking they Edit Signers/CC's button.
 - The Edit Signers & Copies To overlay displays
 - If the user did not go into the document they will see an X by their name indicating they can be removed.

Note: Users are only able to remove themselves as a signer of a document if they have been added as a signer but haven't accessed the document through the document routine.

The screenshot shows a software interface with a 'Sign List' on the left and a document view on the right. The document is titled 'Comb Gastroscopy/Colonoscopy' for patient 'Trainrv,Edm04_1117'. An 'Edit Signers & Copies To' modal is open, displaying a list of signers. 'Paul Matos, IN' is highlighted with a red box and an 'X' icon, indicating he can be removed. 'Maria Ma, MD' is listed as a signer. The modal also shows document specialties like 'Internal Medicine' and 'Additional Copies To' including 'Kathryn Genevieve Armstrong (ED)'. At the bottom of the modal are 'Cancel' and 'Save' buttons.

- Clicking the X removes the user as a co-signer
- The user can now clicks the Save button
- The document drops off the Sign List

This screenshot shows the 'Edit Signers & Copies To' modal for a document titled 'Internal Medicine Consult'. The modal lists 'Maria Ma, MD' as a signer. Under 'Document Specialty', 'Internal Medicine' is selected. Under 'Copies To', 'DR. Andre Valentin Bedard (Fam)' is listed. The 'Additional Copies To' section includes 'Maria Ma (Adm)' and 'Ontario Health Insrnc Plan'. The 'Save' button at the top right of the modal is highlighted with a red box.

Note: If users have added themselves as a co-signer by accessing the document you can enter an addendum indicating that you have accessed the document in error.

4. Reviewing Draft & Pending Reports from the Sign List
 - a. Clicking on the patient's name will give you a preview of the document
 - b. If the document is in Draft or Pending status and you wish to complete the document you can click on the Edit button to launch the document routine

The screenshot shows the 'Sign List' interface. On the left, there is a list of documents under the heading 'Documents (40)'. The first document is highlighted in green and is titled 'AMB,TEN 31/M' with a date of '01/02/2022 15:04' and status 'Draft'. A mouse cursor is pointing at this document. The main area on the right shows a 'Preview' of the document titled 'Adult Diabetes Clinic Report'. The patient information is: 'Patient Name: AMB,TEN', 'Date of Birth: 04/08/1990', 'Attending Provider: Matos,Paul', and 'Date: 01/02/2022 14:55'. The document content shows 'Provider Note' and 'Clinic Note' with the text 'test'. At the bottom of the preview area, there is an 'Edit' button highlighted with a red box, and an 'Edit Signers/CC's' button next to it. A 'Submit' button is also visible at the bottom right.

- c. The user can now use the document routine to complete their documentation and sign off the document

The screenshot shows the document editing interface for 'Adult Diabetes Clinic Report'. The top navigation bar includes 'Preview', 'Rapid Entry', and 'Typicals' buttons. The main content area is divided into several sections: 'Provider Note' (Proc), 'Clinic Note', 'Problem', 'Billing Code', and 'Generic Procedures'. The 'Clinic Note' section is expanded, showing a 'Reason for Consult' field with the text 'test'. The 'Problem' section has an 'Add' button. The 'Billing Code' section has a 'Billing Code' field. The 'Generic Procedures' section is collapsed. On the right side, there is a patient information panel for 'Amb,Ten' (31, M - 04/08/1990) with MRN# V00000211. Below this, there are sections for 'Special Indicators' and 'Allergies'. At the bottom of the editing area, there is a 'Save' button and a 'Sign' button. The 'Edit' button is highlighted with a red box.