Patient Signature Capture in PCM Documents

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Support for capturing patient signatures into PCM documents has been added, you can use a Topaz Signature Pad or any Tablet PC for capturing patient signatures.
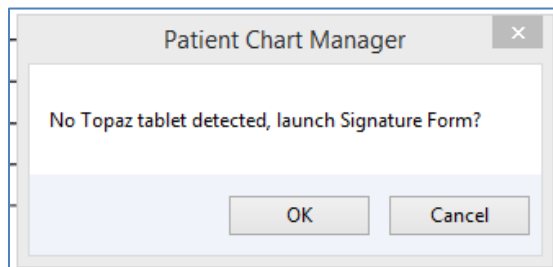
If you will be using a Topaz Signature Pad, please see the Topaz Signature Pad Software Installation instructions

The following information applies for all documents types in PCM;   **PDF, PEN and TEXT**

> ➢ You can capture more than one patient signature on the document (for PDF, make sure that the text box name is unique for each, see information under the Signature Setup)

> ➢ The patient signatures can be applied to **Univ**, **AllUser** , **NOSIG** and **REQ** types of documents

> ➢ The patient's guarantor name, date and time stamp will show below the patient signature

> ➢ The patient's name will show if a guarantor for the patient does not exist

> ➢ The signature is logged to the log files as 'Record Signed Guarantor'
> (Support Note: this is also logged in the chart_docs table, the final column in the doc list will have the date)

> ➢ If an external Topaz Tablet is hooked up, the following signature pop-up comes up, after the patient signs and clicks on 'Done', the signature is then transferred into the PCM document.
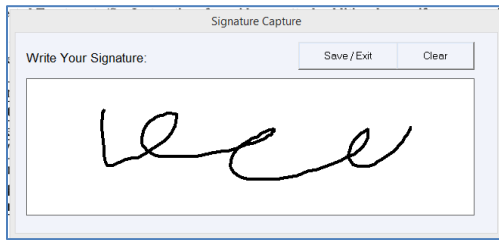

> ➢ If an external Topaz Signature Pad is not hooked up, you can have the patient sign using a Tablet PC, the following message comes up, after you click on 'OK', a signature Capture window comes up, after the patient signs and clicks on 'Save/Exit' the signature is transferred to the PCM document

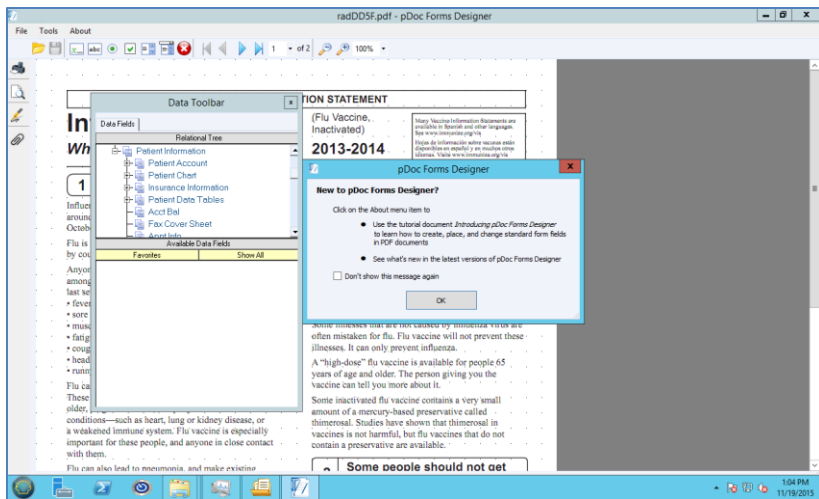# Patient Signature Capture in PCM Documents

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PDF Doc- Patient Signature Setup

Prior to editing your PDF document, please see section Install the pDoc Signer Program for software installation Instructions (bottom of this document), this program is required for designing PDF documents for insertion of Patient Signature boxes

1. Go to Doc Setup
2. Pen/Handwritten
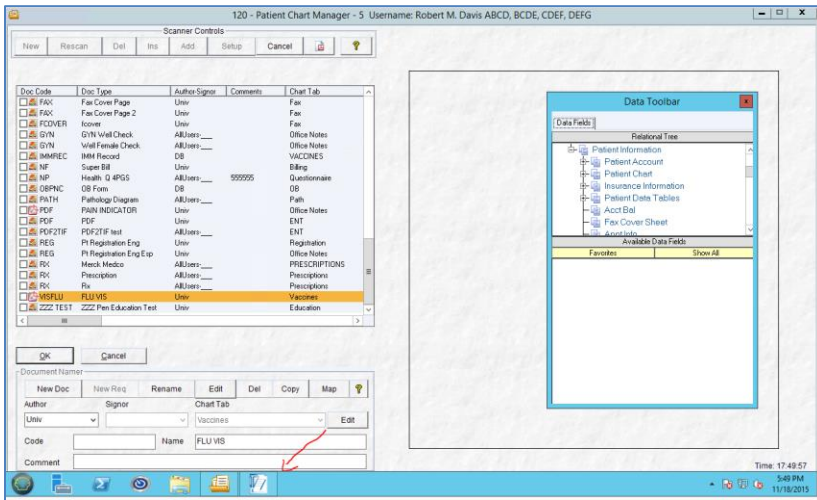3. Select the PDF document you want to edit
4. Click on 'Edit'
   Note:
   - o The Data Toolbar must be open during the entire time, if you try to close it a message will come up "You must close the PDF forms designer program first, then this form."
   - o In the near future, support for adding PCM auto-fills in the PDF designer will be added
5. When editing a PDF document for the first time, you will see a tutorial option, you can click on the check box to not show again and then click on 'OK'
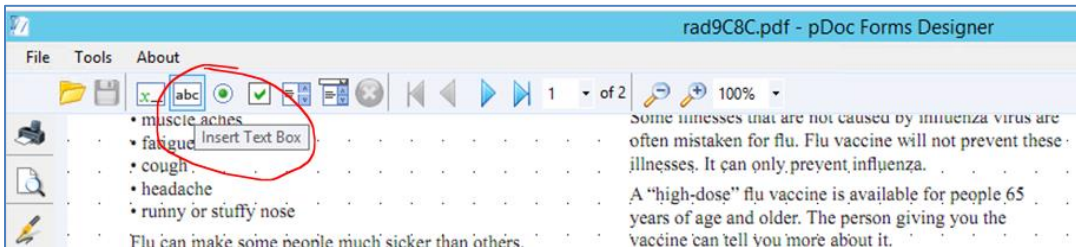

6. Drag the Data Toolbar to the right side of the screen
   ➢ You will notice the editor screen will disappear, but it is actually minimized in the task bar
7. Click on the Forms Designer program from the task bar to bring up the editor again

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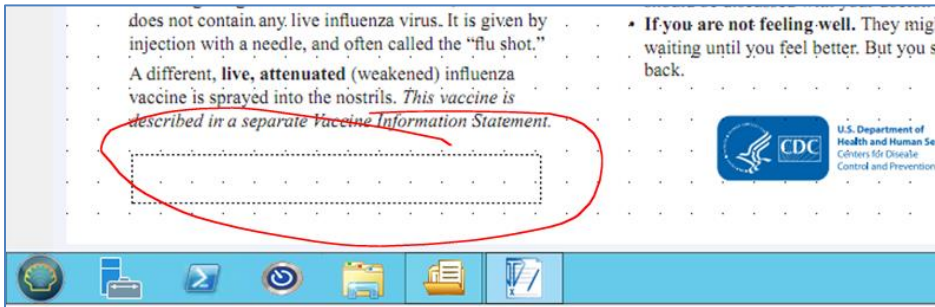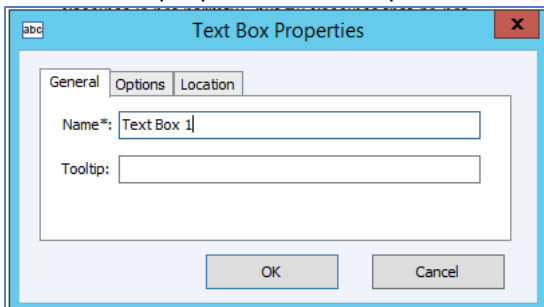# Patient Signature Capture in PCM Documents
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8. Click on 'Insert Text Box' control from the toolbar

9. Draw a text box where you want the patient's signature to appear on the document

10. Text box properties comes up

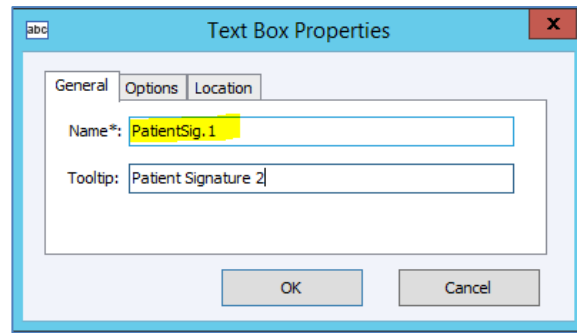11. **Important:** Rename the Name* field to be exactly "PatientSig.0" (without the quotes)
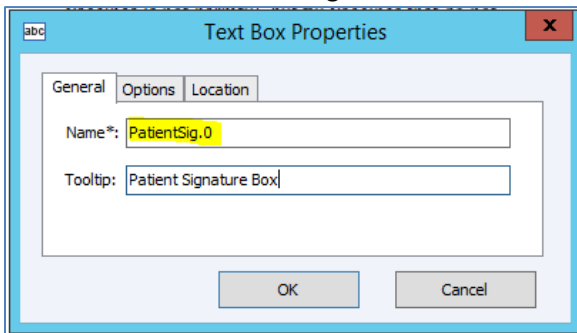   Note:
    ➢ there can be more than one patient signature placeholders within the document; but be sure to name each signature place holder a unique name, such as the following examples; (without the quotes) as long as the "patientsig." is the first part of the Name*
    - o "PatientSig.0", "PatientSig.1" , PatientSig.2, etc…
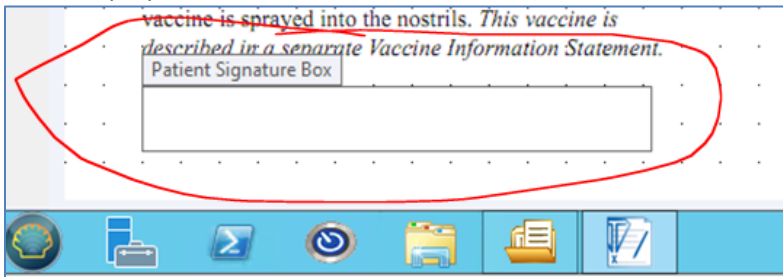   - o "PatientSig.A", "PatientSig.B" , PatientSig.C, etc…

12. Add a tooltip name, this can be anything, such as "Patient Signature" OR "Patient Signature Box"
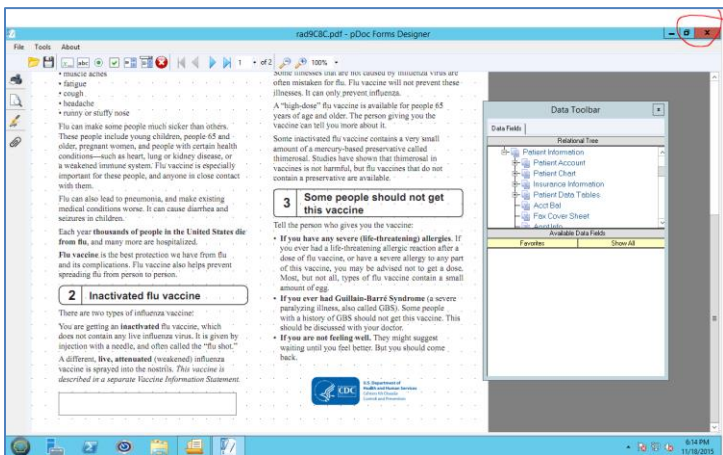13. Ignore the Options and Location Tabs
14. Click 'OK' to save the Signature Place holder

15. The signature place holder is now added to the document, when you hover the mouse over the text box, the tooltip is displayed.

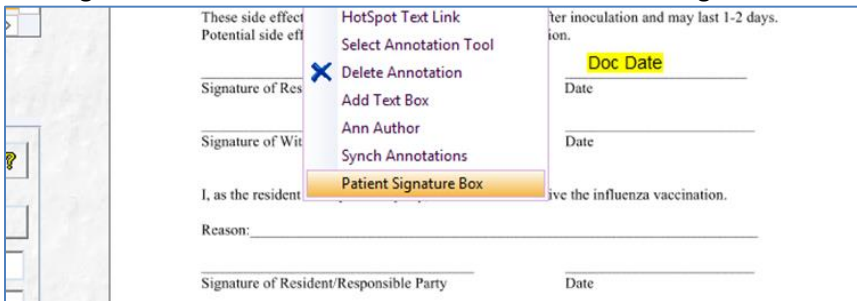16. Click on the Red X to close the document and click on YES to save edits

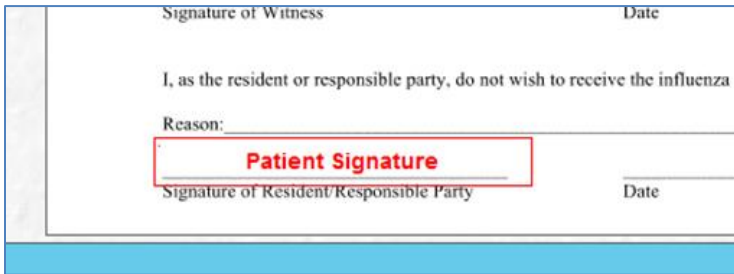## Patient Signature Capture in PCM Documents
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PEN Doc- Patient Signature Setup
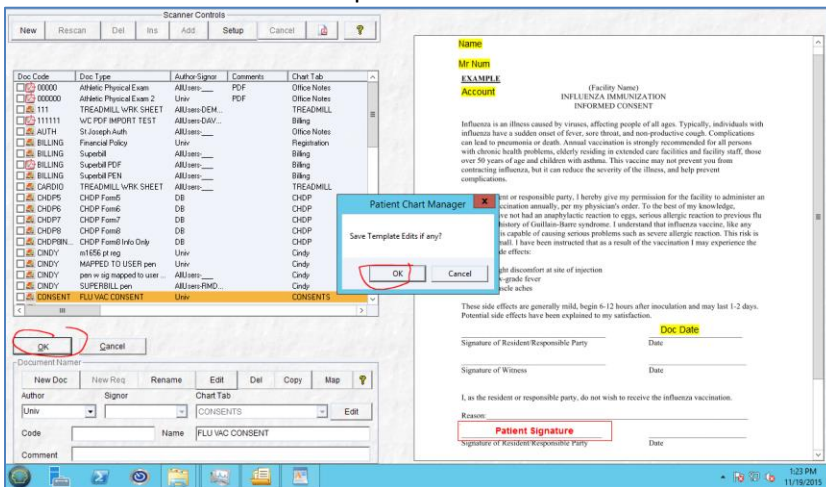After installing the necessary programs; sigplus.exe, sigpluslcd.exe

1. Go to Doc Setup
2. Pen/Handwritten
3. Select the PDF document you want to edit
4. Click on 'Edit'
5. Click 'OK' to the message with auto-fill editing instructions
6. Right click on the document and choose the Patient Signature Box option

7. Drag the mouse to draw a signature box in the location on the document where you want the signature
   ➢ You will notice a box with a red frame with 'Patient Signature'

8. Click 'OK' to save the template

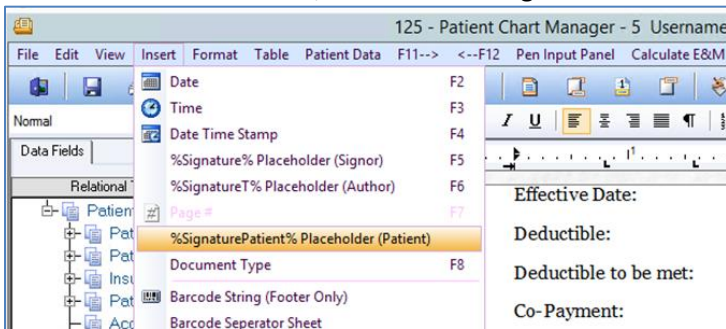9. See instructions below on how the patient will sign these documents.

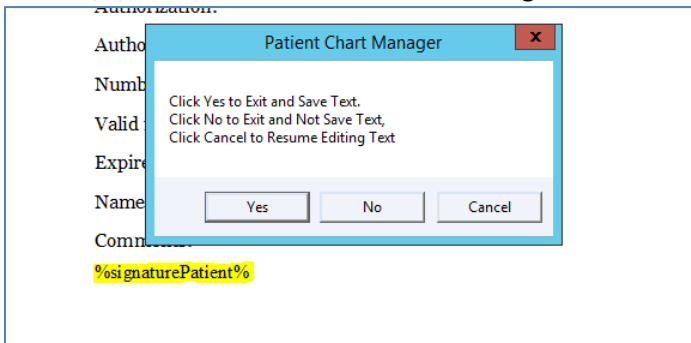# Patient Signature Capture in PCM Documents
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TEXT Doc- Patient Signature Setup
After installing the necessary programs; sigplus.exe, sigpluslcd.exe

1. Go to Doc Setup
2. Text/Transcription
3. Select the PDF document you want to edit
4. Click on 'Edit'
5. Click on the document where you want the patient signature holder to appear on the document
6. Go to the Insert Menu, choose the "%SignaturePatient% Placeholder
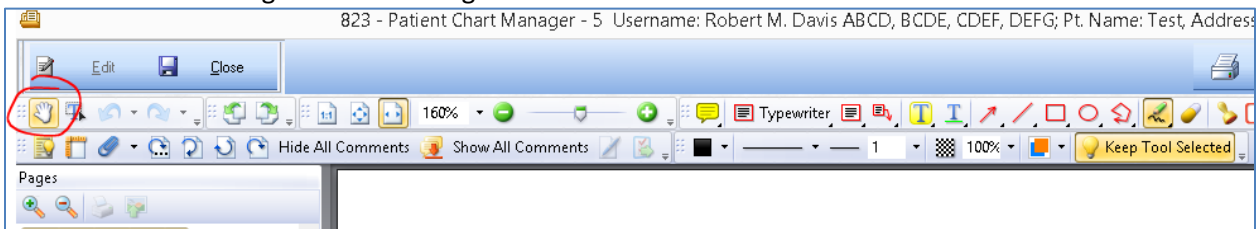

7. Exit/Close the document and Save changes

Patient Signing PDF documents
➢   Once the patient signs the document, and the document is saved, the signature cannot be manipulated or deleted
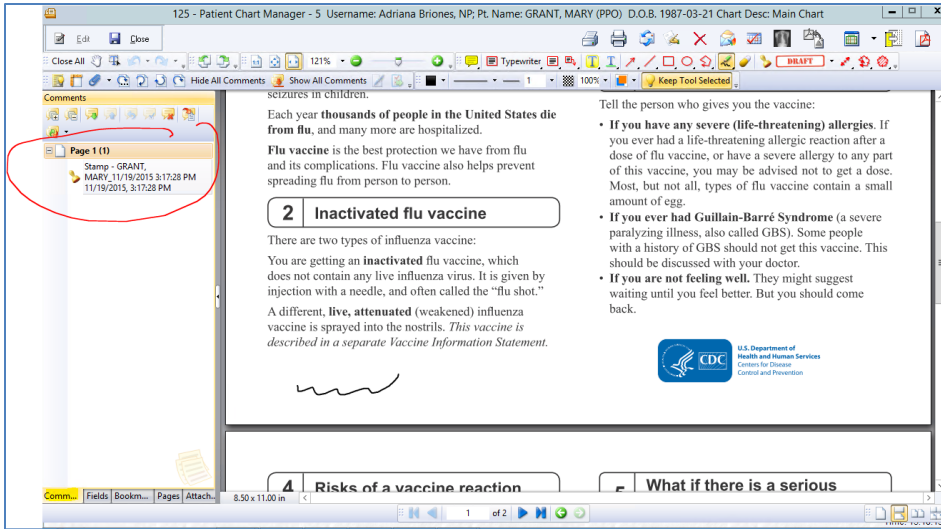

1. Attach or Open the document for the patient in Edit mode
2. Click on the Hand Tool (Run Mode) to activate the Signature field
3. Click on Patient Signature box to sign document

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4. You can Click on the Comments tab from the left panel to view details for the patient signature
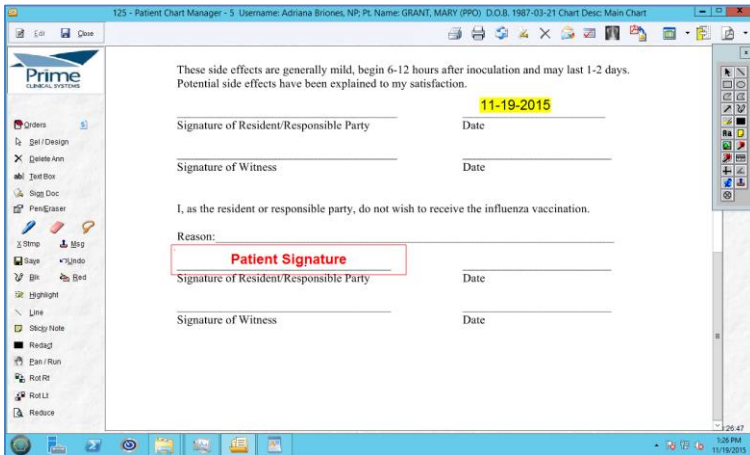

Patient Signing PEN documents

1. Attach or Open the document for the patient in Edit mode

2. Click on the **Pan / Run**
(Otherwise the annotation will be in selection mode, cannot click on it to bring up the Signature caption screen)
3. Click on the red 'Patient Signature' box

Patient Signing TEXT Documents

1. Attach or Open the document for the patient in Edit mode
2. Click on the Hand Tool (Run Mode)
3. Click on %signaturePatient%

Expires on:

Name of adjuster:

Comments:

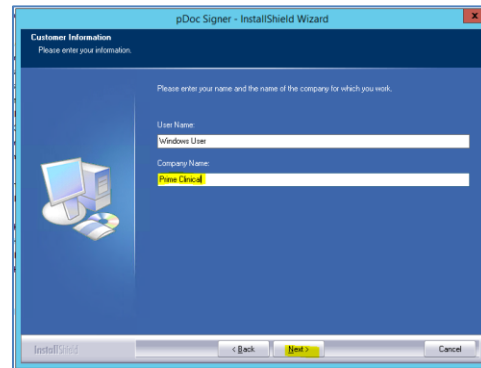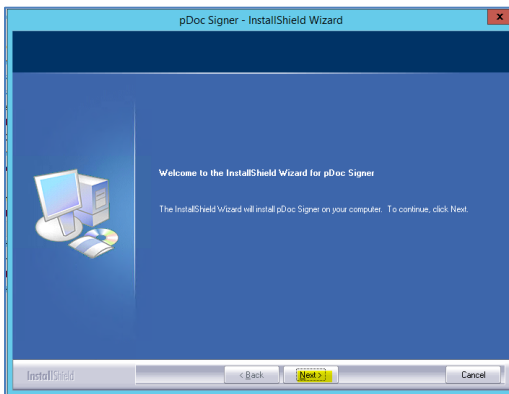%signaturePatient%

Patient Signature Capture in PCM Documents
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Install the pDoc Signer Program (pdocsigner.exe)

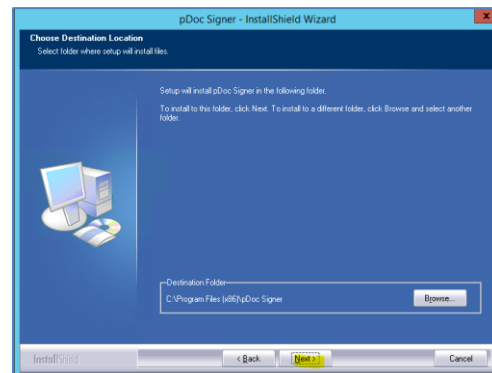This is required for designing PDF forms; for inserting signature place holders

1. Open C:\Program Files (x86)\Patient Chart Manager folder
2. Double click on the pdocsigner.exe file
3. Click on 'Next' to being the installation

4. Click on 'Yes' to the License Agreement

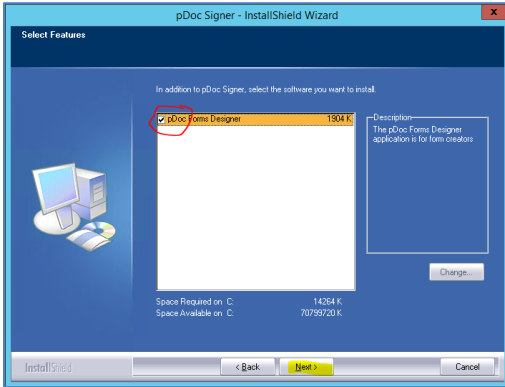5. Type your Company Name and Click on 'Next'

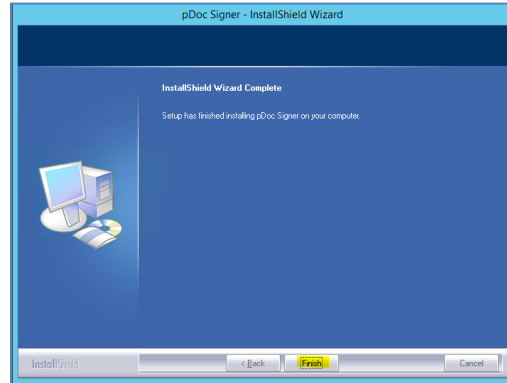
6. Leave default location, Click on 'Next'

7. Make sure that the pDoc Forms designer is checked and click on 'Next'

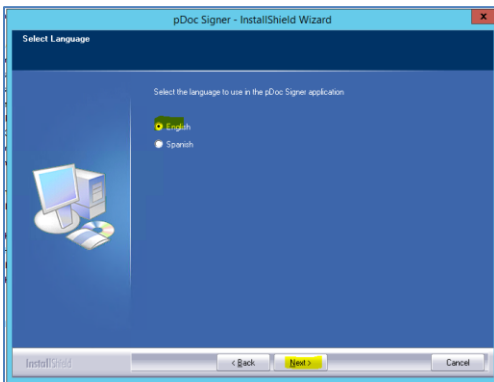# Patient Signature Capture in PCM Documents
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10. Click on 'Finish' to complete the installation

8.   Select Language and click on 'Next'

9. Leave the defaults and Click on 'Next'