



Electronic Signature - Web Client

Electronic Signature - Web Client

Copyright © 2025 by TruBridge

All rights reserved. This publication is provided for the express benefit of, and use by, TruBridge Client Facilities. This publication may be reproduced by TruBridge clients in limited numbers as needed for internal use only. Any use or distribution outside of this limitation is prohibited without prior written permission from TruBridge. The reception of this publication by any means (electronic, mechanical, photocopy, downloading, recording, or otherwise) constitutes acceptance of these terms.

Trademarks:

The TruBridge logo, as it appears in this document is a Trademark of TruBridge.

Limitations:

TruBridge does not make any warranty with respect to the accuracy of the information in this document. TruBridge reserves the right to make changes to the product described in this document at any time and without notice.

Version : 22

Published : January 2025

TruBridge
54 St. Emanuel Street
Mobile, AL 36602
T(877) 424-1777
trubridge.com



Table of Contents

Chapter 1 Introduction

Attestation Disclaimer	1
------------------------------	---

Chapter 2 Overview

Chapter 3 Electronic Signature

Overview	3
E-Sign	4
Transcriptions	5
Sign For Another Physician.....	13
Selecting a Cosigner.....	13
Edit Signed Document.....	17
Patient Orders	17
Co-Sign Orders.....	19
Table Maintenance	20
Overview	20
Physician Security for E-sign.....	20
Physician Table.....	22
Authorized to Sign Documents for Other Physician.....	23
CoSign Setup.....	24
Sign Images	31
Signing for Other Physicians	33
Future Orders	34
Key Maintenance	36
Reporting Signed Positive Cancer Cases	37

Chapter 4 Reports

Cosign Verbal Orders Report	38
-----------------------------------	----

Chapter 5 HIM Transcription Reports

Chapter 6 Ancillary Transcription Reports

Overview	43
Transcription Send/Fail Log	47
How to Print	47
Description and Usage	49
Document Audit Trail	49
Overdue Signatures	51
How to Print	51
Description and Usage	52
Overview Report	54
How to Print	54

- Description and Usage 56
- Order Tracking 58**
 - How to Print 58
 - Description and Usage 60
- Physician's Initials Report 62**
 - How to Print 62
 - Description and Usage 62

Chapter 1 Introduction

1.1 Attestation Disclaimer

Promoting Interoperability Program attestation confirms the use of a certified Electronic Health Record (EHR) to regulatory standards over a specified period of time. TruBridge Promoting Interoperability Program certified products, recommended processes and supporting documentation are based on TruBridge's interpretation of the Promoting Interoperability Program regulations, technical specifications and vendor specifications provided by CMS, ONC and NIST. Each client is solely responsible for its attestation being a complete and accurate reflection of its EHR use during the attestation period and that any records needed to defend the attestation in an audit are maintained. With the exception of vendor documentation that may be required in support of a client's attestation, TruBridge bears no responsibility for attestation information submitted by the client.

Chapter 2 Overview

Electronic Signature is a feature that provides dictating physicians the ability to electronically view, edit and sign their transcribed documents, this includes Medical Records transcriptions as well as Ancillary transcriptions (e.g. Imaging Services/Radiology). The electronic signature may include the physician's name and credentials, but is not an actual handwritten or scanned signature.

This feature includes:

- Viewing and editing transcribed documents online before signing. STAT orders display at the top of the list in and documents Returned for Edit by the transcribing user display with a Y under Edit Required.
- Batch signing an entire list of documents.
- Ability to cosign transcriptions and allow report distribution for cosigned documents.
- Automatically sending the signed document to a designated printer, nursing station, medical records department, and/or physician office/patient location.
- Viewing and editing signed documents.
- Signing transcribed documents for another physician in the same group.
- Transcription Send/Fail Log, which includes signed documents that failed to be electronically transmitted.
- Document Audit Trail, which allows the radiology department to view and print, signed documents only.
- Overdue Signatures report, which tracks delinquent transcriptions as defined for each individual physician.
- Return for Edit, which allows the transcribing user to access documents that include editing instructions that have been returned by the physician.
- Overview Report, which includes options to capture specific data related to electronic signature.
- Order Tracking report, which includes options to capture data related to tracking electronic signature orders beginning from completing the order from the schedule through transcription.

Access to Electronic Signature requires physician UBL with the appropriate security.

Chapter 3 Electronic Signature

3.1 Overview

The Electronic Signature feature allows a physician to automatically assign an electronic signature to a transcribed document, image or order within the TruBridge system. The feature allows the dictating physicians the ability to electronically view, edit and sign their transcribed documents. The electronic signature may include the physician's name and credentials, but is not an actual handwritten or scanned signature.

The system has the capability to remember a physician's passphrase for up to 24 hours with the appropriate security. This means that when a physician signs on for the first time or changes their passphrase and then moves on to perform an Esign function, they only need to key in their passphrase once, and the system will automatically cache the passphrase for up to 24 hours. This will follow the physician from device to device and not require entering of the passphrase during this time for any future ordering or signing. System Management must have **Remember Passphrase** set to Allow.

Select **Web Client > Charts > Tasks**

The screenshot shows the TruBridge Tasks screen. On the left, there is a sidebar with 'Alerts For: WILLIAMS KATHERINE ELISE' and a list of task categories. The 'E-Sign (31)' category is highlighted with a red box. The main area displays a table of tasks with the following columns: Patient Name, Edit Req., Description, Admit, Discharge, Status, Encounter, and Provider. The table lists various orders for patients like JONES RICHARD R, WINDSOR MICHAEL AN..., SMITH ELLA KATHERINE, and HERRON PEYTON G.

Patient Name	Edit Req...	Descrip...	Admit	Discharge	Status	Encounter	Provider...
JONES RICHARD R		ABILIFY (ARIP	06/29/2021		Phone	371423	WILLIAMS ...
WINDSOR MICHAEL AN...		ACETAMIN...	08/28/2019		Verbal	358952	WILLIAMS ...
WINDSOR MICHAEL AN...		ARTERIAL B...	08/28/2019		Verbal	358952	WILLIAMS ...
SMITH ELLA KATHERINE		ASPIRIN 81...	02/06/2023		Verbal	359159	WILLIAMS ...
SMITH ELLA KATHERINE		As tolerated	02/06/2023		Verbal	359159	WILLIAMS ...
JONES RICHARD R		BASIC MET...	06/29/2021		Phone	371423	WILLIAMS ...
JONES RICHARD R		Blood Gluc...	06/29/2021		Protocol	371423	WILLIAMS ...
JONES RICHARD R		CBC W/DIFF	06/29/2021		Phone	371423	WILLIAMS ...
SMITH ELLA KATHERINE		CBC WITH A...	02/06/2023		Verbal	359159	WILLIAMS ...
JONES RICHARD R		CBC WITH A...	06/29/2021		Phone	371423	WILLIAMS ...
WINDSOR MICHAEL AN...		CBC WITH A...	08/28/2019		Verbal	358952	WILLIAMS ...
WINDSOR MICHAEL AN...		CHEST PA &...	08/28/2019		Verbal	358952	WILLIAMS ...
SMITH ELLA KATHERINE		CKMB (CPK ...	02/06/2023		Verbal	359159	WILLIAMS ...
HERRON PEYTON G		COMP MET...	06/07/2019		Phone	358500	WILLIAMS ...

Tasks Screen

Before any document, order or image may be Electronically Signed, a passphrase needs to be created. See [Key Maintenance](#).³⁶

3.2 E-Sign

E-Sign provides access to **E-Sign** or the **Electronic Signature** queue for Phone, Verbal, Protocol, and Co-Signature Orders (for mid-level providers). **Radiology** and **Medical Record** transcriptions may also be signed as well as **Images** that are set to be E-Signed. **Key Maintenance** may be used to change the Passphrase at any time. If a transcription is available, when the check box is selected, the options to **Edit** or **Sign** will be available. The **Addend** and **Amend** options will be available if the **Status** drop-down is set to **Signed** or **All**. This is all dependent upon whether the provider has previously signed a transcription and wishes to go back and Amend the document or add an Addendum to the document.

Select **Web Client > Tasks > E-Sign**

The screenshot shows the TruBridge E-Sign web client interface. The top navigation bar includes 'TruBridge' and 'Tasks'. Below the navigation bar, there are several tabs: 'View', 'Edit', 'Sign', 'Amend', 'Addend', 'Key Maintenance', and 'Refresh'. The main content area is divided into two sections. On the left, there is a sidebar with 'Alerts For: WILLIAMS KATHERINE ELISE' and a list of task categories: 'E-Sign (54)', 'Future Orders (0)', 'Abnormal Labs (10)', 'CDS Alerts (11)', 'Chart Communications (2)', 'Cosignatures (0)', 'Deficiency Notes (0)', 'Escribe (0)', 'Escribe Covering (0)', 'Notes (0)', 'Personal Inbox (6)', and 'Ordering Provider (1)'. The main area displays a table of tasks with the following columns: Patient Name, Edit Req., Description, Admit, Discharge, Status, Encounter, and Provider. The table lists various orders for patients like SMITH ELLA KATHERINE and SMITH GUS B, with statuses ranging from 'Unsigned' to 'Verbal'.

Patient Name	Edit Req...	Descript...	Admit	Discharge	Status	Encounter	Provider...
SMITH ELLA KATHERINE	Y	CHEST PA &...	02/06/2023		Unsigned	359159	WILLIAMS ...
SMITH ELLA KATHERINE		MRI BRAIN ...	02/06/2023		Verbal	359159	WILLIAMS ...
SMITH GUS B		Apply Oxyg...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		Minimize p...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		Constant BL...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		CATH Lab	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		OXYGEN PE...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		MRA AORTA	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		ASPIRIN 32...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH GUS B		NITRO/DW(...	07/07/2017		Protocol	358906	WILLIAMS ...
SMITH ELLA KATHERINE		MYOGLOBIN	02/06/2023		Verbal	359159	WILLIAMS ...
SMITH ELLA KATHERINE		VS - Q 2 Hours	02/06/2023		Verbal	359159	WILLIAMS ...
SMITH ELLA KATHERINE		Continuous...	02/06/2023		Verbal	359159	WILLIAMS ...
SMITH ELLA KATHERINE		As tolerated	02/06/2023		Verbal	359159	WILLIAMS ...

E-Sign

Transcriptions

- To electronically sign a transcription, the physician should leave the Status drop down set as Unsigned. This option lists all unsigned, transcribed Radiology and Medical Record documents for the dictating physician. Selecting the only the Transcriptions check-box will filter the view down to Unsigned Transcriptions.

Select **Web Client > Charts > Tasks > E-Sign**

The screenshot shows the TruBridge E-Sign interface. On the left, there is a sidebar with a list of alert categories for 'WILLIAMS KATHERINE ELISE'. The 'E-Sign (56)' category is selected. The main area displays a table of unsigned transcriptions. The table has columns for Patient Name, Edit Req., Description, Admit, Discharge, Status, Encounter, and Provider. Three rows are visible, all with a status of 'Unsigned'.

Patient Name	Edit Req...	Description	Admit	Discharge	Status	Encounter	Provider ...
JONES RICHARD R		EKG	06/29/2021		Unsigned	371423	WILLIAMS K...
SMITH ELLA KATHERINE		MRI BRAIN ...	02/06/2023		Unsigned	359159	WILLIAMS K...
SMITH ELLA KATHERINE	Y	CHEST PA&...	02/06/2023		Unsigned	359159	WILLIAMS K...

Electronic Signature

- The initial display will include all unsigned documents as of the current date and time in their most recent version.
 - Unsigned transcribed documents that have been flagged for EDIT by the transcribing user will have a "Y" under the Edit Required header.
 - The transcribed documents that appear on this screen may be sorted by selecting the headers at the top of the columns.
 - Patient:** Displays the Patient Name.
 - Edit Required:** Medical Records or Transcribing employee has requested that the provider open and correct/clarify the documentation.
 - Description:** The name of the Radiology test or the Medical Records document title.
 - Admit:** Displays the patient's admission date from the Registration and ADT screen.
 - Disc:** Displays the patient's discharge date from the Registration and ADT screen.
 - Status:** This will default to Unsigned, but if the Status dropdown is changed to Signed or All, it will display both previously signed transcriptions as well as Unsigned and Cosign documents from mid-level providers that require a Cosigner.
 - Encounter:** Displays the patient's account number from the Registration and ADT screen.

- **Provider:** The name of the provider who initiated the Phone, Verbal, Protocol, Transcription, as well as any mid-levels that require a cosignature on an order or transcription.

NOTE: Each physician has the option to show consolidated orders so that any consolidated specific procedures will display. This is a setting in the physician security table. If two exams are combined into one transcription, selection of either order will sign, view or edit the original transcribed document.

- **Statuses:**
 - **Unsigned:** Unsigned, document is transcribed, but not signed, canceled or discontinued. An Unsigned document may be selected and Edited by the provider while that is the status.
 - **Required Edit:** Will show as Unsigned, these documents have been flagged for edit by the transcribing user. These documents will have a Y in the Required Edit column.
 - **Signed:** Signed, document is signed, not canceled or discontinued. These will display when Status drop-down is set to All or Signed.
 - **Cosign:** This status indicates that the document requires a Cosignature. The provider name that requires the Cosignature along with the transcription will appear in the cosigning physician's queue
 - **Amended:** Amended/Unsigned, previously signed document is amended, but may only be Edited or Signed
 - **Addended:** Addendum/Unsigned, previously signed document has had an addendum, but may only be Edited or Signed.

3. Action bar options are available so that transcriptions may be selected for signing documents. All documents may be selected by selecting the top box next to patient name or individual documents may be selected to sign. To select all the patient documents at once, select the checkbox at the top of the column for transcriptions and then select **Edit, Sig, or View**, from the action bar. All the transcriptions on the display will be automatically selected to perform the same action. To individually Edit, Sign, or View transcriptions, select the individual checkbox(es) next to the Patient Name. The transcriptions will open up in Microsoft Word with options at the top left of the screen. Edit or View will bring up each transcription in sequence after the previous document has been Signed or Viewed. Selecting Sign will not open the document prior to allowing you to Sign.

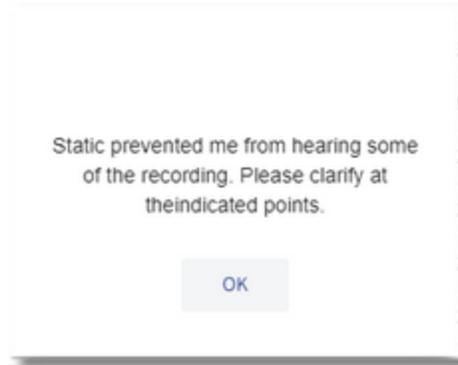
Edit

The **Edit** radio button allows the transcription to be viewed and edited by the signing physician during the Electronic Signature process. If several transcriptions are selected, the system will bring the next transcription in line into view when the previous transcription is closed.

NOTE: Physicians must have security, **Authorized to Edit**, from Physician Security to be able to edit transcriptions.

If the document was flagged as requiring an edit, the edit instructions entered by the transcribing user will be displayed before the Microsoft® Word software is accessed. Selecting OK will launch Microsoft® Word.

Select Web Client > Charts > Tasks > E-Sign > Select transcription > Select Edit



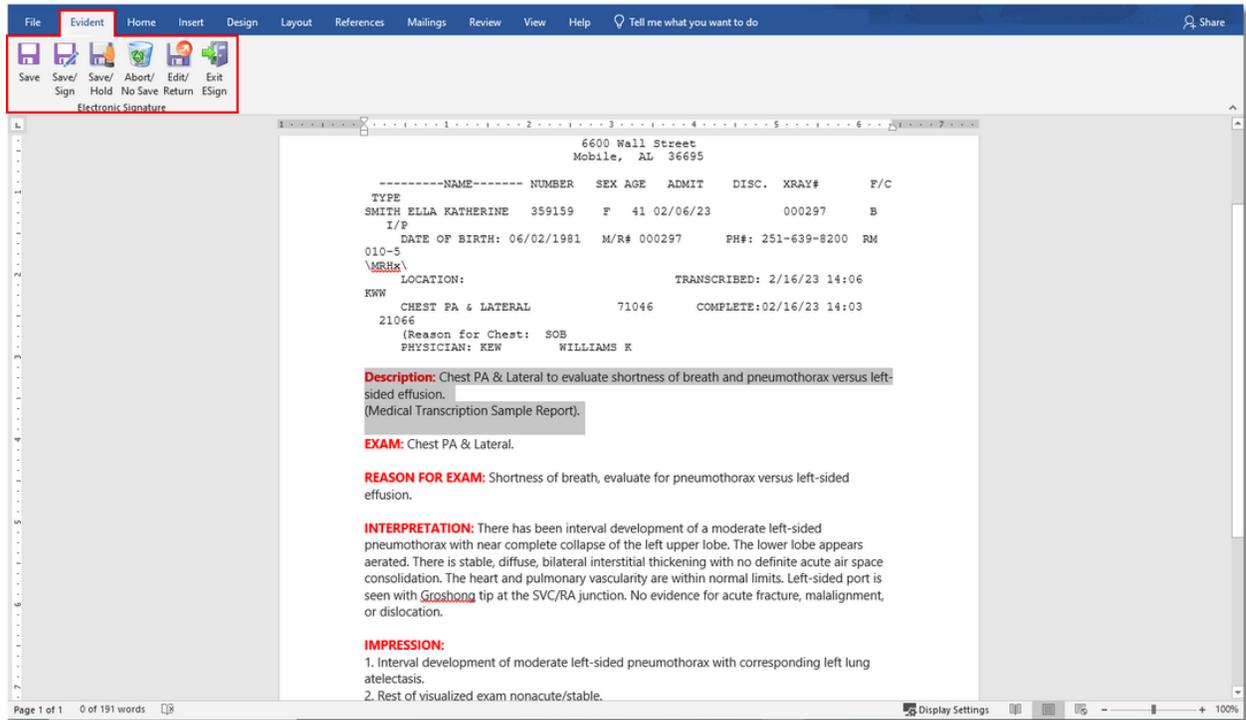
Message From transcribing user

After the report has been edited/viewed in Microsoft® Word, click on one of the following Electronic Signature toolbar options:

- **Save:** This will save the document after any changes have been made, but does not sign the document.
- **Save/Sign:** Saves the changes and prompts for the passphrase. When entered, the transcription is signed.
- **Save/Hold:** Saves the changes and exits to the Electronic Signature selection screen. This function will leave the transcription in the physician's queue with a status of unsigned.
- **Abort/No Save:** Exits to the Electronic Signature selection screen and no changes are saved. A prompt will appear, when selected, to insure that the user does want to exit without saving changes.
- **Edit/Return:** Presents an edit box to enter edit instructions for the transcribing user and returns the document to the transcribing user.
- **Exit ESign:** This will not save any changes that have been made to the document and will terminate the batch signing process (if signing transcriptions in a batch). A prompt for exiting without changes will appear to verify whether the user does or does not want to exit.

Editing functions from within Microsoft® Word are still available on the application toolbar, but the **Evident** option on the toolbar must be selected to have access to the above-listed options.

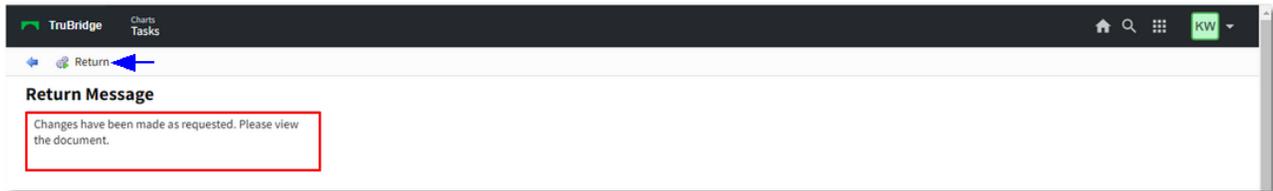
Select Web Client > Charts > Tasks > E-Sign > Select transcription > Select Edit



E-Sign Transcription Screen

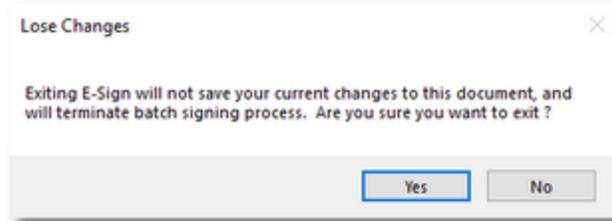
NOTE: Transcriptions against orders that have been returned to the transcribing user may be accessed by selecting the **Return for Edit**. The option is located on the Ancillary Department Functions menu (Hospital Base Menu-Department Specific-Return for Edit) of the appropriate department or from Medical Records (Hospital Base Menu-Master Selection-Medical Records-Transcribe Orders-Return for Edit). Medical records transcriptions that have been returned to the transcribing user may be accessed by selecting **Returned MR ESignature Documents** from Medical Records (Hospital Base Menu-Master Selection-Medical Records-Returned MR ESignature Documents).

Select **Web Client > Charts > Tasks > E-Sign > Select transcription > Select Edit > Edit transcription > Edit/Return**



Edit/Return Message Prompt for Signing Physician

- **Exit ESign:** Closes the document without electronically signing. When selected, this function will exit the E-Sign Microsoft® Word document, but not before the following message/prompt will display to warn the user that they must select "Save" to save any changes made to the document. If Yes is selected, the document will close. If No is selected, the document will remain open with the edits that were made by the user still intact.

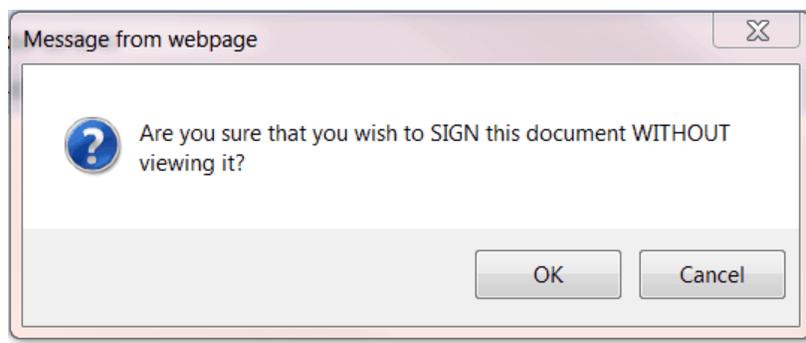


Lose Changes Prompt

Sign

The **Sign** option allows the signing physician to electronically sign a transcription without reviewing the transcription. Selecting documents to sign before viewing or editing will display " Are you sure that you wish to SIGN this document WITHOUT viewing it?" warning. Select **OK** to proceed or **Cancel** to abort the signing option.

NOTE: This feature is controlled by the **Warning When Select 'Sign'** field on page 1 of the **Physician Security table in Tables > Clinical.**



Sign Without Viewing Warning

- If **OK** is selected then the system will allow signing of the document without viewing.

- Process will have to be selected for signing to be carried out.
- This option will prompt for the pass phrase defined for the signed on physician.
- Enter the pass phrase and select **OK** or select **Cancel**.

View

The **View** option on the Action Bar allows documents to be reviewed and electronically signed. No changes or edits may be made to the document.

- If the document was flagged as requiring an edit following transcription, the document will be highlighted in red. The edit instructions entered by transcribing user will be displayed before Acrobat Reader® software is accessed.
- If the document was not flagged as requiring an edit following transcription, Acrobat Reader® will be accessed and the transcribed report will be displayed.
- The options to Sign, Edit, Return (to transcribing user if previous Edits were made by the user), and Hold (stays unsigned in E-Sign folder) will be available for documents that are in an Unsigned status. Amend and Addend will be available on any documents that have already been signed.

Select **Web Client** > **Charts** > **Tasks** > **E-Sign** > **Select transcription** > **Select View**

The screenshot shows the TruBridge web client interface. At the top, there is a navigation bar with 'TruBridge Charts Tasks' and a user profile 'KW'. Below the navigation bar is an action bar with buttons for Sign, Edit, Amend, Addend, Return, Hold, and Cancel. The main content area displays a PDF document titled 'filetopdf740717761114804423.pdf' at 100% zoom. The document content includes patient information for CPSI MEMORIAL HOSPITAL, a table of patient data, and a medical transcription report for a chest X-ray.

NAME	NUMBER	SEX	AGE	ADMIT	DISC.	XRAY#	F/C
SMITH ELLA KATHERINE	359159	F	41	02/06/23		000297	B

DATE OF BIRTH: 06/02/1981 M/R# 000297 PH#: 251-639-8200 RM 010-5 \MRHX\
 LOCATION: TRANSCRIBED: 2/16/23 14:06
 KWW CHEST PA & LATERAL 71046 COMPLETE:02/16/23 14:03
 21066
 (Reason for Chest: SOB
 PHYSICIAN: KEW WILLIAMS K

Description: Chest PA & Lateral to evaluate shortness of breath and pneumothorax versus left-sided effusion.
 (Medical Transcription Sample Report).

EXAM: Chest PA & Lateral.

REASON FOR EXAM: Shortness of breath, evaluate for pneumothorax versus left-sided effusion.

INTERPRETATION: There has been interval development of a moderate left-sided pneumothorax with near complete collapse of the left upper lobe. The lower lobe appears aerated. There is stable, diffuse, bilateral interstitial thickening with no definite acute air space consolidation. The heart and pulmonary vasculature are within normal limits. Left-sided cost is

E-Sign View Transcription

After one of the above functions are selected and processed, the system will prompt for the signing physician to enter the Passphrase. Entering the correct Passphrase signs the document and applies any or all of the following data to the transcribed report:

- Signature or Cosignature (DCTNAME) pulling from the Signature field in Physician Security corresponding to the dictating physician initials as defined in Physician Maintenance Table.
- Credentials (RADCREDED) from the Credential field in Physician Security corresponding to the dictating physician initials as defined in Physician Maintenance Table.

NOTE: *TruBridge recommends placing the physician's credentials in the Signature field of the Physician Security table page 1. This will allow the credentials to pull with the physician's name when using the DCTNAME mnemonic. An example would be Daniel E Smith, MD. The Credentials field in the Physician Security table page 1 should be reserved for the physician's specialty such as Radiologist, Chief of Staff etc.*

- Signed date and time (SIGNDATE)
- Result date and time (RSLTDATE), Received date and time (RCVDATE), Collect date and time (COLLDATE), and the Schedule date and time (SCHEDATE) all pulling from Order Entry Maintenance.
- REPDIST which details a list of physicians/locations receiving transcription.
- Sends the report(s) to the designated location(s) defined.
- For transcriptions against orders, it changes the status of the order to **SIG-Signed** in Order Review and Order Entry Maintenance.
- For transcriptions against orders, it updates Order Entry Maintenance field **Signed** with the physician initials, date and time.
- For medical record transcriptions, it updates the stats to **S - Signed** within the Transcription System.

Additional filters are available to expand or narrow the results in the E-Sign folder:

Select **Web Client > Charts > Tasks > E-Sign: Transcriptions > Status: All**

The screenshot shows the TruBridge web client interface. On the left, there is a navigation menu with categories like 'E-Sign (59)', 'Future Orders (0)', 'Abnormal Labs (10)', 'CDS Alerts (11)', 'Chart Communications (2)', 'Cosignatures (0)', 'Deficiency Notes (0)', 'Escribe (0)', 'Escribe Covering (0)', 'Notes (0)', 'Personal Inbox (6)', and 'Ordering Provider (1)'. The main area displays a table of transcription records. The table has columns for 'Edit Req...', 'Descripti...', 'Admit', 'Discharge', 'Status', 'Encounter', and 'Provider...'. A dropdown menu is open over the 'Status' column, showing options for 'All', 'Unsigned', and 'Signed'. The 'Status' column in the table is highlighted with a red box, and the 'Signed' option in the dropdown is highlighted with a blue box.

Edit Req...	Descripti...	Admit	Discharge	Status	Encounter	Provider...
	WINDSOR MICHAEL AN...	PROGRESS ...	05/21/2013 12/11/2013	Signed	357622	WILLIAMS K...
	ROGERS JESSICA I	ESIGN PT I...	10/06/2015 01/15/2019	Signed	357923	WILLIAMS K...
	ROGERS JESSICA I	ESIGN PT I...	10/06/2015 01/15/2019	Amended	357923	WILLIAMS K...
	CUNNINGHAM CAROLIN...	PATIENT PR...	02/29/2016 06/07/2019	Signed	358910	WILLIAMS K...
	CUNNINGHAM CAROLIN...	PATIENT PR...	02/29/2016 06/07/2019	Addended	358910	WILLIAMS K...
	JONES RICHARD R	PATIENT PR...	09/02/2016 06/07/2019	Signed	358974	WILLIAMS K...
	JONES RICHARD R	PATIENT PR...	09/02/2016 06/07/2019	Addended	358974	WILLIAMS K...
	JONES RICHARD R	EKG	06/29/2021	Unsigned	371423	WILLIAMS K...
	SMITH ELLA KATHERINE	MRI BRAIN ...	02/06/2023	Unsigned	359159	WILLIAMS K...
	SMITH ELLA KATHERINE Y	CHEST PA &...	02/06/2023	Unsigned	359159	WILLIAMS K...
	WINDSOR MICHAEL AN...	CT HEAD W/...	07/25/2017 08/28/2019	Signed	358951	WILLIAMS K...
	WINDSOR MICHAEL AN...	CHEST PA &...	12/02/2014 02/09/2017	Signed	357900	WILLIAMS K...
	WINDSOR MICHAEL AN...	CT HEAD W ...	12/11/2013 09/16/2014	Signed	357899	WILLIAMS K...

E-Sign Transcription Status

- **Status:** This drop-down has several options, the default **Unsigned**, **Signed**, or **All**. Selecting **Signed** will display documents that have been previously signed by the provider. Some functions may be performed on previously-signed documents. Selecting **All** will display both the Unsigned and Signed transcriptions together. The Status column will show **Signed**, **Unsigned**, **Amended**, **Addended**, or **Cosign** transcriptions.
- The options for **Amend** and **Addend** will only be selectable on the action bar if the selected document has already been signed.
- **Admit Date Start / End:** A date range may be entered to search for documents created within the Start and End times entered.
- **Covering:** If this is selected, the 6-digit physician numbers that are set up in the Tables > Clinical > Physician Security Pg 2 > Authorized To Sign Documents For fields will appear and the name of the physician will be viewable in the Provider column. The document(s) may then be selected and "Signed."
- **Physician Group:** If this is selected, 3-character Physician Group code that is entered in the Tables > Clinical > Physician Security Pg 2 > Chartlink Group Code (and Sub Groups) will display any Providers that are set up in a Chartlink/Physician Group with the user. The Chartlink Group Code is set up in the CL Table availables from System Menu > Master Selection > Business Office Tables > Business Office Table Maintenance > CL Tables > Chartlink Groups.

Sign For Another Physician

E-Sign has the ability to allow the user to electronically sign transcribed documents dictated by another physician and orders placed by another physician. This authorization is setup in the [Physician Security Table](#) ²⁰.

Select **Web Client > Charts > Tasks > E-Sign**

The screenshot shows the TruBridge E-Sign interface. On the left, there is a sidebar with various alert categories like 'E-Sign (82)', 'Future Orders (0)', 'Abnormal Labs (10)', etc. The main area displays a list of tasks with columns for Patient Name, Edit Required, Description, Admit, Discharge, Status, Encounter, and Provider Name. At the top of the task list, there are filter checkboxes for 'Covering' and 'Physicians Group', both of which are checked and circled in red. Below the table, a red box highlights the 'Provider Name' column, showing names like 'WATSON KELLY' and 'DONALD HARPER'.

Patient Name	Edit Required	Description	Admit	Discharge	Status	Encounter	Provider Name
WINDSOR MICHAEL AN...		C.I. HEAD W/WO CON I	08/28/2019		LOUSIGN	358952	WATSON KELLY
WINDSOR MICHAEL AN...		==>PT ORDER==	08/28/2019		COSIGN	358952	WATSON KELLY
WINDSOR MICHAEL AN...		1200 ADA	08/28/2019		COSIGN	358952	WATSON KELLY
SMITH ELLA KATHERINE		I&O Q Shift	02/06/2023		COSIGN	359159	WATSON KELLY
SMITH ELLA KATHERINE		Vital signs every 30 ...	02/06/2023		COSIGN	359159	WATSON KELLY
SMITH ELLA KATHERINE		Admit patient to OBS	02/06/2023		COSIGN	359159	WATSON KELLY
HERRON PEYTON G		CT HEAD W CONT	06/07/2019		COSIGN	358500	WATSON KELLY
ROGERS JESSICA I		CHEST PA & LATERAL	01/15/2019		COSIGN	358142	WATSON KELLY
SMITH ELLA KATHERINE		1200 ADA	02/06/2023		COSIGN	359159	WATSON KELLY
ROGERS JESSICA I		TROPONIN I	01/15/2019		COSIGN	358142	WATSON KELLY
SMITH ELLA KATHERINE		==>PT ORDER==	02/06/2023		COSIGN	359159	WATSON KELLY
ROGERS JESSICA I		CBC W/DIFF	01/15/2019		COSIGN	358142	WATSON KELLY
SMITH ELLA KATHERINE		CT HEAD W/WO CONT	02/06/2023		COSIGN	359159	WATSON KELLY
SMITH ELLA KATHERINE		CL BASIC METABOLI...	02/06/2023		COSIGN	359159	WATSON KELLY
SMITH ELLA KATHERINE		CBC	02/06/2023		COSIGN	359159	WATSON KELLY
PARKER THOMAS		Blood Glucose: ACH...	03/02/2018		Protocol	358096	DONALD HARPER
BRODY JAMES FRANCES		CT ABDOMEN W/WO ...	05/28/2015		Verbal	357849	DONALD HARPER
HARTLEY ADDISON		ALBUMIN	05/10/2016	06/11/2019	Verbal	357946	DONALD HARPER
ERICSON MATTHEW		IBUPROFEN (MO	05/06/2016		Verbal	357943	DONALD HARPER

E-Sign - Covering and/or Physician Group

1. From the E-Sign folder, select the **Covering** and/or **Physicians Group** checkbox(es).
2. Sort by provider name to see documents from providers that are set up to be covered for or set up in a Physician Group. The search may be narrowed by selecting just the **Transcriptions** check box to see only Medical Record Transcriptions or Radiology Transcriptions that require a co-signature (or providers for whom the logged-in provider is authorized to sign for them).

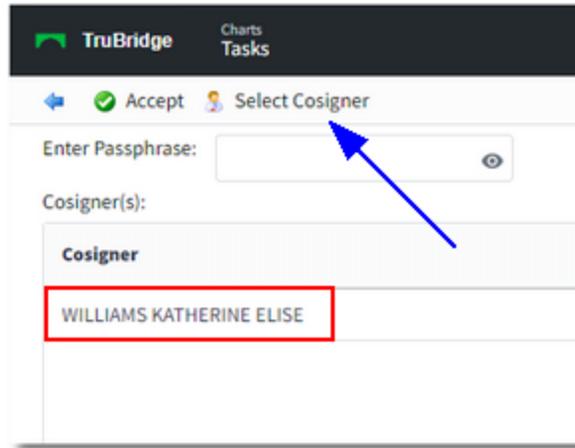
Selecting a Cosigner

TruBridge software has the ability for midlevels to select a cosigning provider for their transcribed documents. The Electronic Signature application will allow for a second cosignature for those documents or orders requiring such authentication when initiated by a midlevel provider (such as a Nurse Practitioner or Physician Assistant).

- From the Home Screen, select **E-Sign**.
- If a mid-level provider has phone, verbal, or protocol orders placed by nursing to address, they will be available in their E-Sign folder. The mid-level provider (or provider requesting/requiring co-signature from another provider) will be prompted to select a co-signing provider. If one or more cosigners have been added to the System Administration > Login > Events for signing, they will

appear under the **Cosigner** header. The **Select Cosigner** option is available to search from a list of providers to select as the cosigner.

Select Web Client > Tasks > E-Sign > select Phone/Verbal/Protocol Order > Sign > Select Cosigner > Enter Passphrase



The screenshot shows the TruBridge web client interface. At the top, there is a header with the TruBridge logo and 'Charts Tasks'. Below the header, there is a navigation bar with a back arrow, a green checkmark icon labeled 'Accept', and a person icon labeled 'Select Cosigner'. A blue arrow points to the 'Select Cosigner' option. Below the navigation bar, there is an 'Enter Passphrase:' field with a text input box and a toggle icon. Below the passphrase field, there is a 'Cosigner(s):' section with a table. The table has a header row labeled 'Cosigner' and one data row containing the name 'WILLIAMS KATHERINE ELISE', which is highlighted with a red rectangular box.

Choose Cosigner

Select Web Client > Tasks > E-Sign > select Phone/Verbal/Protocol Order > Sign > Select Cosigner

The screenshot shows the 'Select Co-signer' interface in the TruBridge system. At the top, there is a 'Select' button with a green checkmark. Below it, the title 'Select Co-signer' is displayed. The 'List Type' is set to 'Logname' and the search field contains 'B'. A table lists several users, with 'u010000 Baxter James' selected, indicated by a blue checkmark in a red box. A blue arrow points to the 'Select' button.

Name	Description
bew08219	BEN E WATZ
j802000	BROWNING JASON A
cp04592	BYRD ANDY
u010000	Baxter James
wrb4916p	Billy Brannon
u068000	Bixler Sandy
u552676	Blankenship Brent
u421421	Boulet Francis
blr4614p	Brie Reynolds
u100000	Brown Alice
bap3006	Paul Brian

Select Co-Signer

When the cosigning physician signs in to Electronic Signature, the documents requiring their signature will display as Cosign with the originating provider's Name listed to the side.

After signing the document, the <<COSIGNATURE_PENDING>> mnemonic will fulfill based on page 3 of the Physician Security table.

Transcription Signed and Cosigned

**Evident Community Hospital
6000 Wall Street
Mobile, Alabama 36695**

RADIOLOGY REPORT

Patient name:	SMITH ELLA KATHERINE	Acc number:	10100200	Location:	CARE
MANAGEMENT					
Age:	39	Sex:	Admit Phy:	PHYS1ABR	
Birthdate:	05/05/1970	Staytype:	I/P	Ordering Phy:	PHYS3ABR
Admit date:	11/01/08	Room:	012-2	Med Rec Num:	9999999
Disch date:		Phone:	546/545/6444	X-ray number:	9999999

Unsigned transcriptions represent a preliminary report and do not represent a Medical or Legal Document

MM SCREENING 76645 COMPLETE:04/07/10 08:51 XXX 81503
Reason for Procedure: SCREENING

Findings: Bilateral examination of the breasts shows no significant changes since the patient's last mammogram dated 02-22-09. There are mild calcifications, but no other significant findings at this time.

Impression:

Mild calcifications noted. Otherwise normal bilateral mammogram.

Electronically Reviewed and Signed by:
Arthur L. Williams, Radiologist
Date/Time: 04/07/10 09:34

Electronically Reviewed and Cosigned by: John L. Baxter Radiologist
Cosigned on 04/07/10 at 09:35

ALW/XXX
t: 04/07/10 09:31

NOTE: The ability/requirement to Cosign is set up in physician security in special functions. Please refer to the [Table Maintenance chapter on CoSign Setup](#)²⁴ for information on how to enable this feature.

Edit Signed Document

Signed documents may be edited within Electronic Signature by the signing physician.

1. Select the **Status** drop-down to change from **Unsigned** to **Signed**. All Signed and Unsigned documents from the selected date range for Admit Date Start/End (if indicated) will be available.
2. Select the document and then select **Amend** or **Addend**.

NOTE: The Signing Physician must have **Authorized to Edit** in the Physician Security Table.

- **Amend:** Allows changes to be made to the transcribed document and will require a new electronic signature.
 - **Addend:** Allows additions to be made to the transcribed document and will require a new electronic signature.
3. The document will open in Microsoft Word for editing. Enter the necessary changes.
 4. The document may be signed within the Save/Sign option in the same Microsoft Word window. If Save is selected, the document will be at an Unsigned status and must be Electronically Signed again.

Patient Orders

If nursing staff enters protocol, phone or verbal orders for a provider, the provider will access the Electronic Signature application to electronically sign the orders. Please note that protocol, phone and verbal orders are recorded as electronic (CPOE) orders because the provider must sign the orders electronically.

To sign orders, select the radio button to the left of the desired item or select the check box on the top to select all items in the list. Then select **Sign** to enter the passphrase.

Select Web Client > Tasks > E-Sign

TruBridge Charts Tasks

View Edit Sign Amend Addend Key Maintenance Refresh

Alerts For: WILLIAMS KATHERI

Status: Unsigned Admit Date Start / End

Type: Transcriptions Co-Sign Orders Phone Orders Verbal Orders Protocol Orders Images All

<input checked="" type="checkbox"/>	Patient Name	Edit Req...	Descript...	Admit	Discharge	Status	Encounter	Provider...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		CBC WITH A...	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		TROPONIN I	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		URINALYSIS...	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		EKG	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		CKMB (CPK ...	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	SMITH ELLA KATHERINE		TROPONIN I	02/06/2023		Verbal	359159	WILLIAMS ...
<input checked="" type="checkbox"/>	HERRON PEYTON G		ZOLPIDEM (...	06/07/2019		Phone	358500	WILLIAMS ...
<input checked="" type="checkbox"/>	HERRON PEYTON G		COMP MET...	06/07/2019		Phone	358500	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		CBC WITH A...	06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		URINALYSIS...	06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		CBC W/DIFF	06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		Insulin REG (06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		ABILIFY (ARIP	06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		GLUCOSE	06/29/2021		Protocol	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		Blood Gluc...	06/29/2021		Protocol	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	JONES RICHARD R		BASIC MET...	06/29/2021		Phone	371423	WILLIAMS ...
<input checked="" type="checkbox"/>	WINDSOR MICHAEL AN...		CHEST PA &...	08/28/2019		Verbal	358952	WILLIAMS ...

Electronic Signature

Co-Sign Orders

Providers may be set to have a required cosignature on orders placed through CPOE by mid-level providers. These orders may be narrowed down by selecting the the Co-Sign Orders filter. The Provider column will display the name of the mid-level provider requiring/requesting co-signatures.

Select **Web Client > Tasks > E-Sign**

The screenshot shows the TruBridge E-Sign interface. The left sidebar contains navigation options like Alerts, E-Sign (75), Future Orders (0), Abnormal Labs (10), CDS Alerts (15), Chart Communications (2), Cosignatures (0), Deficiency Notes (0), Escribe (0), Escribe Covering (0), Notes (1), Personal Inbox (7), Electronic Prescriptions (0), and Notes Task List (3). The main area displays a table of orders with filters for Status (Unsigned), Admit Date Start/End, and Type (Transcriptions, Co-Sign Orders, Phone Orders, Verbal Orders, Protocol Orders, Images, All). The 'Co-Sign Orders' filter is selected and highlighted with a red box. The table has columns for Patient Name, Edit Req..., Descript..., Admit, Discharge, Status, Encounter, and Provider... The 'Provider...' column is highlighted with a red box. A blue arrow points to the first row of the table.

Patient Name	Edit Req...	Descript...	Admit	Discharge	Status	Encounter	Provider...
HERRON PEYTON G		INIT NEB IN...	06/07/2019		COSIGN	358500	WATSON K...
WINDSOR MICHAEL AN...		CL BASIC M...	08/28/2019		COSIGN	358952	WATSON K...
ROGERS JESSICA I		CBC W/DIFF	01/15/2019		COSIGN	358142	WATSON K...
ROGERS JESSICA I		TROPONIN I	01/15/2019		COSIGN	358142	WATSON K...
WINDSOR MICHAEL AN...		CT HEAD W...	08/28/2019		COSIGN	358952	WATSON K...
WINDSOR MICHAEL AN...		=>PT ORDE...	08/28/2019		COSIGN	358952	WATSON K...
WINDSOR MICHAEL AN...		1200 ADA	08/28/2019		COSIGN	358952	WATSON K...
SMITH ELLA KATHERINE		I&O Q Shift	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		Vital signs e...	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		Admit patie...	02/06/2023		COSIGN	359159	WATSON K...
HERRON PEYTON G		CT HEAD W...	06/07/2019		COSIGN	358500	WATSON K...
ROGERS JESSICA I		CHEST PA &...	01/15/2019		COSIGN	358142	WATSON K...
SMITH ELLA KATHERINE		1200 ADA	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		=>PT ORDE...	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		CT HEAD W...	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		CL BASIC M...	02/06/2023		COSIGN	359159	WATSON K...
SMITH ELLA KATHERINE		CBC	02/06/2023		COSIGN	359159	WATSON K...

Electronic Signature

NOTE: If a midlevel only requires a cosignature on certain Order Types or Transcriptions, there is a Behavior Control available for a **No Cosignature Needed** that may be granted to the mid-level or other provider login that they can select when the Orders/Transcriptions do not require a cosignature.

Table Maintenance

Overview

This chapter will describe the fields and security needed to allow a physician to electronically sign within the TruBridge system.

All fields for creating a physician within the system are setup by the TruBridge Financial Software Support Division during the initial software installation. After the install, security should be given by the Medical Staff to certain hospital staff to update and create new physicians as needed.

Physician Security for E-sign

Select **Web Client > Tables > Clinical > Physician Security**

The screenshot shows the 'Physician Security' configuration page for Facility 1: EVIDENT COMMUNITY HOSPITAL, Physician: 580 SMITH ALLISON. The page is divided into several sections:

- Basic Information:**
 - Use Electronic Sign:
 - Authorized to Edit:
 - Signature Overdue After: 3 days
 - Signature: ALLISON C SMITH
 - Credentials: RADIOLOGIST
 - Inc. Prev. Ver. w/ unsign.:
- Order Entry Trans:**

	1	2	3	4	5	(Patient Types)
Autoprint reports when signed:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Printer: 807
Autosend to nursing stations when signed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Printer: 807
Autosend to physicians/location when signed:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dept: 052
Autosend to Medical Records when signed:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
- Suppress Autosend To MR:**

HN	1	2	3	4	5
	<input type="checkbox"/>				
	<input type="checkbox"/>				
	<input type="checkbox"/>				
- Suppress Autosend To Physician For Locations:**

1	2	3	4	5
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
- Access ChartLink System:**
- Send Physician a copy of transcription:**
 - P - when transcribed
 - F - when signed
 - B - Both
- Show Consolidated Ords:
- Warning when select 'Sign':
- Use MR Electronic Sign:
- Test Physician:
- Place cursor at the end of inserted information:

System Management, Physician Maintenance

- **Enter Phy. Number:** A valid six-digit physician number to define options for this physician. Physician must be defined in Physician Maintenance of the Business Office tables.
- **Use electronic signature?:** Permits the physician to perform electronic signature on transcriptions placed on orders.
- **Authorized to Edit?:** This field gives the physician the ability to edit transcribed documents with the Electronic Signature feature.
- **Signature overdue after: __ days:** Determines the number of days after which a transcribed report is considered outstanding for this signing physician. The patient name and order information will be placed on the Overdue Electronic Signature report in Revenue Generating - RG Phase (ancillary) departments.
- **Signature:** Enter the physician's name exactly as it should be in the Electronic Signature. The mnemonic for this field in the transcribed document will be DCTNAME, which should be set up in the header.
- **Credentials:** Contains the signing physician's credentials that will pull to the transcription mnemonic RADCREd in an electronically signed document.

***NOTE:** TruBridge recommends placing the physician's credentials in the Signature field of the Physician Security table page 1. This will allow the credentials to pull with the physician's name when using the DCTNAME mnemonic. An example would be Daniel E Smith, MD. The Credentials field in the Physician Security table page 1 should be reserved for the physician's specialty such as Radiologist, Chief of Staff etc.*

- **Inc. Prev. Ver. w/ unsig?:** When selected, the Electronic Signature screen will default to All, displaying all versions of the unsigned electronic signature documents. If not selected, the Electronic Signature screen will default to Current, displaying only the latest version of the electronic signature documents.
- **Show Consolidated Ords:** Determines if the signing physician sees the original order and the orders consolidated within the transcription for specific procedures.
- **Warning when select 'Sign':** Select this field in order for a warning to appear when a Physician selects the Sign option without Viewing or Editing. The warning is as follows: " Are you sure you want to sign documents w/o viewing or editing"?
- **Use MR Electronic Sign?:** This field turns on the MR Electronic Signature feature for this physician.

Physician Table

The Physician Initials must be entered when transcribing Transcriptions Against Orders. These initials determine which Electronic Signature queue the report will go to for E-sign.

Select **Web Client > Tables > Control > Physicians**

The screenshot shows the 'Physician Maintenance' form in the TruBridge web client. The form is for 'Facility 1: EVIDENT COMMUNITY HOSPITAL' and is for 'Physician Number: 580'. The form is divided into two main sections: 'Physician Information' and 'Professional Information'. The 'Physician Information' section includes fields for Name (SMITH ALLISON), Prefix, Suffix, Professional Suffix, Address 1, Address 2, City, State, Zip (00000), and County. The 'Professional Information' section includes fields for Signon Name, Sliding Scale Code, Staff Phys (checked), Resident, Physician Initials (ACS), NPI#, UPIN#, CCN#, Social Security#, DEA#/Suffix, NADEAN, Transcription Order, Phys Rounds Group, State ID (DPS), OR Sched / Surgeon, and Available for Secure Messaging. There are also fields for Phone 1 and Phone 2, each with an Ext. and Comment field. The Name Abc field is set to SMITH A. The form is titled 'Physician Maintenance' at the bottom.

Physician Maintenance

- **Physician Initials:** Initials defined in the Physician Table will need to match those entered by the transcribing user in order for the signing physician to view, edit and sign their dictated transcriptions.

Authorized to Sign Documents for Other Physician

TruBridge software has the ability to allow the signed on physician to electronically sign transcribed documents dictated by another physician and orders placed by another physician. This authorization is setup in the Physician Security Table.

Select **Web Client > Tables > Clinical > Physician Security > Page 2**

The screenshot displays the 'Physician Security' configuration page for 'Facility 1: EVIDENT COMMUNITY HOSPITAL' and 'Physician: 580 SMITH ALLISON'. The page is on 'Page 2' of a multi-page form. Key sections include:

- Chartlink Security Switches:** A list of seven checkboxes:
 1. Allow Pharmacy Order Entry:
 2. Access Confidential Patients:
 3. Allow Ancillary Order Entry:
 4. Allow Medical Order Entry:
 5. View Demographic Info for All Patients:
 6. Allow Standing Order Entry:
 7. Allow Temporary Registration:
- Chartlink Group Code:** A text input field.
- Sub Groups:** A row of five text input fields.
- All Physicians:** A checkbox.
- Location Codes:** A row of eight text input fields.
- Contract Codes:** A row of eight text input fields.
- Authorized To Sign Documents For:** A table with columns for physician numbers and names. The first row contains the values '10000' and '53155'.

System Management, Physician Maintenance, Page 2

- **Authorized to Sign Documents for:** Allows this physician to sign transcriptions for any of the physicians listed in this field. If the physician(s) number is unknown, an alpha look-up display is available for staff and non-staff physicians. The list pulls from the Physician Table in the Business Office tables. The dictating physician's name may be fulfilled by the READNAME neumonic in the transcription. The signing physician's name, and initials are added when transcription is signed.

NOTE: This field is password protected and uses the Daily Password. Employee security switch 73 is necessary to allow access to the fields. Contact the TruBridge Client Services for assistance.

CoSign Setup

The ability to co-sign transcribed documents as well as verbal, telephone and protocol orders initiated by midlevel providers is possible within the Thrive software. The Electronic Signature application will now allow for a second cosignature for those documents or orders requiring such authentication when initiated by a midlevel provider (such as a Nurse Practitioner or Physician Assistant).

The following fields in Physician Security pertain to cosignature for medical record transcriptions, transcriptions against orders and order entry.

Select **Web Client > Tables > Clinical > Physician Security > Page 3**

Physician Security, Page3

The following fields in Physician Security are needed on the midlevel provider:

- Require Additional Sig? Y/N/P: Cosigner:** If **Y** is entered, the provider is required to have any orders, transcriptions and verbal and telephone orders initiated by him/her to be co-signed by a Cosigner: (either an individual 6-digit physician number or a ChartLink group code entered in the field directly adjacent). If **P (prompt)** is entered, a list of providers to co-sign the transcription will be presented during the Electronic Signature process but will not require selection of a providers name from the list. **Cosigner:** Enter the Supervising physicians number. This will allow the supervising physician entered to pull to the top of the list when the midlevel is choosing which physician to send the transcription.

NOTE: Any co-signing physician will see a list of documents from any midlevel providers for whom they are responsible for co-signing. This will list in the signing physician's queue broken out below their normal electronic signature documents when the co-signing physician logs into electronic signature.

- **Send trans. when mid-level signs?:** This field determines when a transcription is auto-distributed after Electronic Signature. This field needs only be set for physicians or providers (NOT requiring a co-signature) with midlevels working under their supervision. This field works in conjunction with the existing report distribution fields and settings for both order entry and medical records transcriptions. The options are as follows:
 - **S** - The transcription will be auto-distributed when the midlevel signs the document (first signature).
 - **C** - The transcription will be auto-distributed after the supervising physician co-signs the document (second signature).
 - **B** - The transcription will be auto-distributed after the midlevel signs and again after the supervising physician signs. In this scenario, the report will be sent twice.
- **Cosigned by label:** The information in this field will pull to any transcription that uses the <<COSIGNATURE_PENDING>> mnemonic. The wording in this field is used in combination with a co-signing supervising physician.

Example: *Cosigned by label has the following phrase loaded in the field: "Electronically Reviewed and Co-signed by:" When the co-signing physician (ex John Doe, MD) signs the document that was previously signed by the midlevel provider, the co-signing physician's name will pull to the transcription and it will read: "Electronically Reviewed and Co-signed by John Doe, MD."*

NOTE: *The co-signing physician's credentials will pull from page 1 of the physician security.*

The <<COSIGNATURE_PENDING>> mnemonic must be inserted into any transcription template (order entry or medical records) to allow for co-signature. This mnemonic may be placed in either the header/footer section or the body of the template. This mnemonic will fulfill when the co-signing physician signs the document (the 2nd signature) and will pull in a combination of the information in the **Cosigned by label** field plus the information brought forth via the **DCTNAME** mnemonic (the signing physician's name as input in Physician Security, page 1, **Signature:**). Logic has been put in the software such that this new mnemonic will blank itself out if the transcription was dictated by the physician and hence does not require a co-signature. In other words, this mnemonic may be placed in all transcription templates and does not require setting up additional templates simply to accommodate a co-signature scenario, nor will the mnemonic remain unfulfilled in the report if the physician is the first and only one who would sign the document.

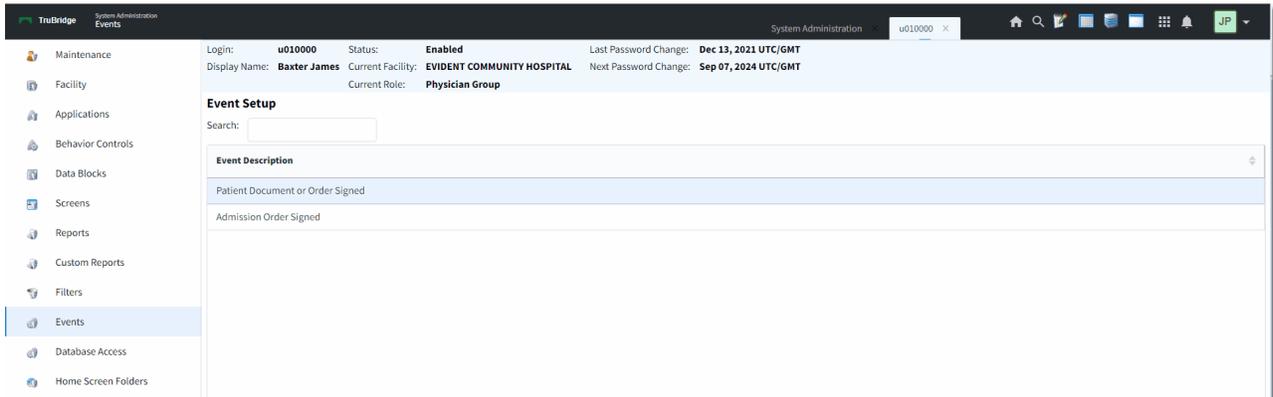
NOTE: *TruBridge recommends placing the physician's credentials in the Signature field of the Physician Security table page 1. This will allow the credentials to pull with the physician's name when using the DCTNAME mnemonic. An example would be Daniel E Smith, MD. The Credentials field in the Physician Security table page 1 should be reserved for the physician's specialty such as Radiologist, Chief of Staff etc.*

Functionality for cosignature on Physician Documents, Documentation, and Order Entry is defined in Identity Management.

Events

Patient Document or Order Signed will allow a default cosigner(s) to be assigned to a midlevel provider that requires a cosignature on all orders and documents.

Select **Web Client > System Administration > Logins > Select Login > Events**

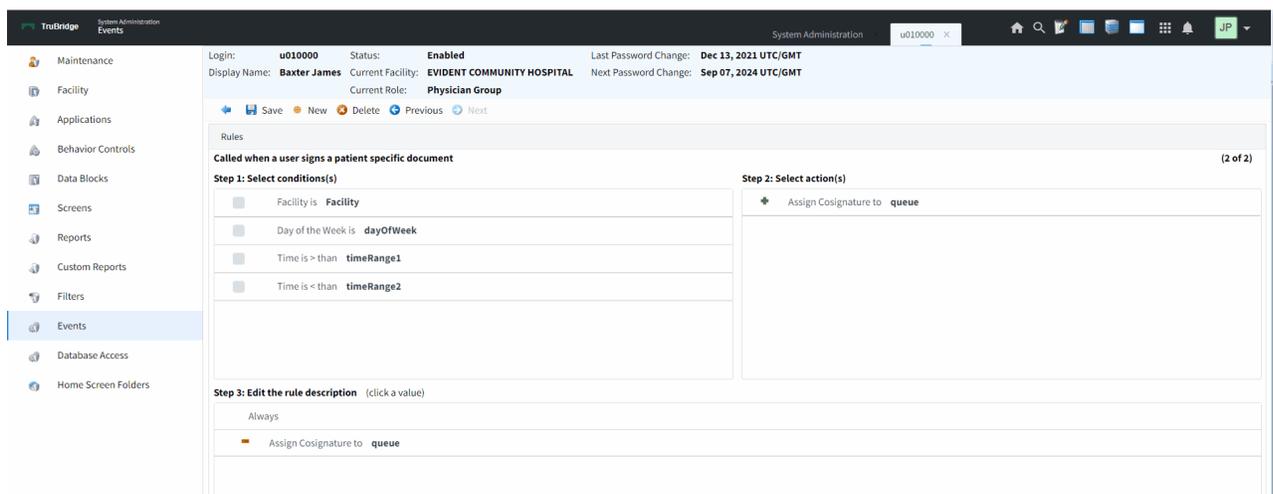


System Administration - Events

To add a Cosignature Event, from **System Administration** on the navigation panel, select **Logins**.

1. Highlight and select the desired login and select **Events**.
2. From the Event Setup select **Patient Document or Order Signed**.

Select **Web Client > System Administration > Logins > Select Login > Events > Patient Document or Order Signed > New**



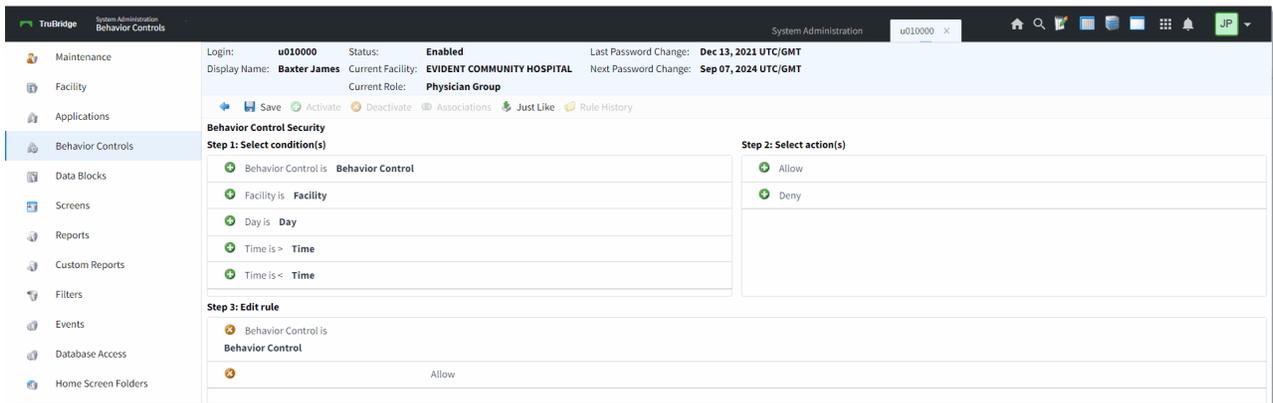
System Administration - Events

- From the Rules screen, select the green radio button in Step 2: Select action(s). The action will move to Step 3: Edit the rule description.
- Select **queue** and the **Select Co-Signer** will display to select the cosigner by **Logname**, **Physician List** or **Physician Group**. Multiple may be selected. The selected physicians or physician groups will be at the top of the drop-down listing for selection for the midlevel to select from.

Electronic Signature Behavior Controls

Logins may be set with Electronic Signature Behavior Controls to not have a cosignature on specific orders or documents and the ability to remember a passphrase for up to 24 hours.

Select **Web Client > System Administration > Logins > Select Login > Behavior Controls > New**



System Administration - Behavior Controls

To add a Electronic Signature Behavior Control, from **System Administration** on the navigation select **Logins**.

- Highlight and select the desired login and select **Behavior Controls**.
- Select **New**.
- From the Behavior Control Security select **Behavior Control** from Step 1 and **Allow** from Step 2. Each of these options will move to the Step 3: Edit rule section.
- Select **Behavior Control** in Step 3 for Selected Behavior Controls.
- Select **Add**.

Select Web Client > System Administration > Logins > Select Login > Behavior Controls > New > Add Step 1 and Step 2 > Select Behavior Control > Add

The screenshot shows the 'Behavior Controls' section in the TruBridge System Administration interface. The user profile is for 'Baxter James' (Login: u010000) at 'EVIDENT COMMUNITY HOSPITAL'. The 'Behavior Controls' table is as follows:

Application	Description
Documentation	Skip required questions in documentation
Documentation	Web Client Documentation
Electronic Signature	Remember Passphrase
Electronic Signature	No Cosignature Needed
Enterprise Wide Scheduling	Create/Edit My Schedules
Enterprise Wide Scheduling	Override Scheduling Blocks
Enterprise Wide Scheduling	Open Charts

System Administration - Behavior Controls

6. Select the desired Behavior Control and select **Insert**.

- **Remember Passphrase:** When set to Allow, the passphrase may be entered once during an electronic signature session. Once the passphrase is entered, the system will hold the passphrase for up to 24 hours. The default is one hour when the Remember Passphrase is added, but additional time may be added from the Roles Settings by Facility or Login Settings by Facility.
- **No Cosignature Needed:** When set to Allow, the user will have the ability to choose whether or not the document, document report or admission orders will require a Cosignature. The Electronic Signature page will have a new check box available for **No Cosignature Needed** during the electronic signature process. Once selected, the available Cosigners will not be available. This behavior will only work when a cosigner is connected with the Event **Patient Document Signed** or **Admission Order Signed**.

Order Entry Behavior Controls

Logins may be set with Order Entry Behavior Controls to require cosignature or remember a cosigner for 12 hours during Order Entry.

Select **Web Client > System Administration > Logins > Select Login > Behavior Controls > New**

The screenshot displays the 'Behavior Control Security' configuration page. At the top, it shows the user's login information: Login: u010000, Status: Enabled, Last Password Change: Dec 13, 2021 UTC/GMT, Next Password Change: Sep 07, 2024 UTC/GMT. The current facility is EVIDENT COMMUNITY HOSPITAL and the current role is Physician Group. The page is divided into three steps: Step 1: Select condition(s), Step 2: Select action(s), and Step 3: Edit rule. Step 1 shows conditions like 'Behavior Control is Behavior Control', 'Facility is Facility', 'Day is Day', 'Time is > Time', and 'Time is < Time'. Step 2 shows actions 'Allow' and 'Deny'. Step 3 shows the rule 'Behavior Control is Behavior Control' with the action 'Allow'.

System Administration - Behavior Controls

1. To add an Order Entry Behavior Control, from **System Administration** on the navigation, select **Logins**.
2. Highlight and select the desired login and select **Behavior Controls**.
3. Select **New**.
4. From the Behavior Control Security select **Behavior Control** from Step 1 and **Allow** from Step 2. Each of these options will move to Step 3: Edit rule section.
5. Select **Behavior Control** in Step 3 for Selected Behavior Controls.
6. Select **Add**.

The screenshot displays the 'Behavior Controls' configuration page. At the top, it shows the user's login information: Login: u010000, Status: Enabled, Last Password Change: Dec 13, 2021 UTC/GMT, Next Password Change: Sep 07, 2024 UTC/GMT. The current facility is EVIDENT COMMUNITY HOSPITAL and the current role is Physician Group. The page shows a list of behavior controls. The 'Order Entry' behavior control is highlighted with a red box, and its description is 'Remember Co-signer for 12 Hours'.

System Administration - Behavior Controls

7. Select the desired Behavior Control and select **Insert**.

- **Require Co-signer:** When set to Allow, the user will be required to have a cosigner for Order Entry. If there is no default cosigner, the user will receive a drop-down to select a physician or physician group.
- **Remember Co-signer for 12 Hours:** When set to Allow, the physician or physician group selected the first time the mid-level signs an order will retain the selected co-signer for 12 hours. After 12 hours the system will default to the original settings.

For more information on Behavior Controls and Events, see the Identity Management user guide.

3.3 Sign Images

Scanned images may be signed from the Images option within Electronic Signature from the **E-Sign** folder on the **Tasks** screen. E-Signing Images takes Image Titles that are set up for E-Sign and scanned in through batch scanning to be electronically signed and stored on a patient's account. The signed image will then show on the File List tab in Electronic File Management for Medical Records. These must then be sent to the provider's E-Sign folder via the **Assign Images to Sign Queue** option in System Menu from Hospital Base Menu > Master Selection.

When scanned documents are assigned, providers will have access to their E-Sign folder on the Tasks screen to see the scanned documents that have been assigned. The process to E-sign a scanned documents using the Tasks screen is the same, regardless of how the Tasks screen is accessed.

Sign Images

1. Once the Images check box has been selected, a list of scanned documents requiring Electronic Signature will display. Select the scanned document to be electronically viewed/signed. Select **View** to view the image and **Sign** to enter a passphrase.

Select **Web Client > Charts > Tasks > E-Sign > Images**

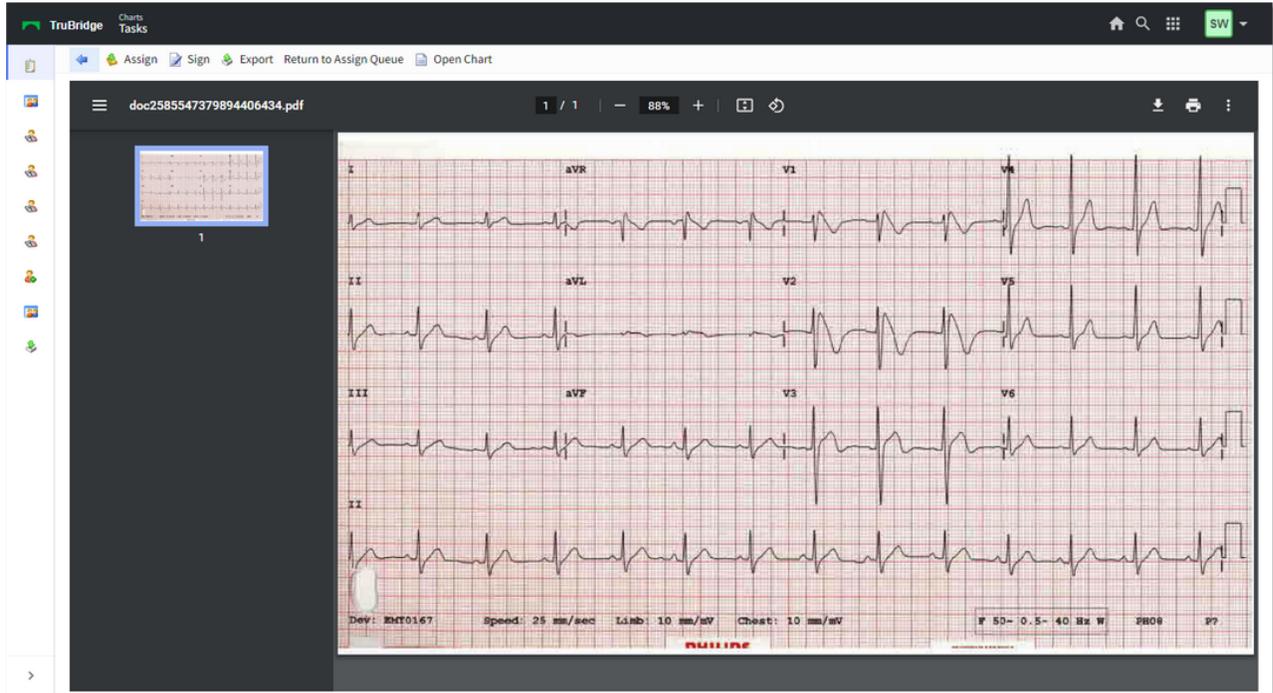
The screenshot shows the TruBridge E-Sign Images interface. The top navigation bar includes 'View', 'Edit', 'Sign', 'Amend', 'Addend', 'Key Maintenance', and 'Refresh'. The 'Alerts For' dropdown is set to 'WILLIAMS KATHERINE ELISE'. The 'Status' is 'Unsigned'. The 'Type' section has 'Images' checked and circled in red. The table below lists scanned documents:

	Patient Name	Edit Requi...	Description	Admit	Discharge	Status	Encounter	Provider ...
<input type="checkbox"/>	BENSON MARY HELEN		EKG	02/07/2023		07/13/2023 1...	358366	WALLACE SA...
<input checked="" type="checkbox"/>	BEECH DAVIS SANDERS		EKG	06/19/2023		07/21/2023 0...	358434	WALLACE SA...

E-Sign Images

- The scanned document will be displayed on the screen. If the scanned document was sent in error, select **Return to Assign Queue** on the action bar. This will return the scanned document to the Assign Images to Sign Queues to be assigned to the correct provider. Select **Sign** on the action bar to sign the scanned document.

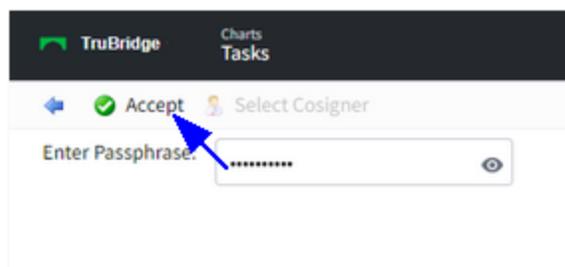
Select **Web Client > Charts > Tasks > E-Sign > Images > View**



E-Sign Images - Select Image

- The system will prompt to enter the Passphrase set up by the employee or physician. Type in the passphrase and hit the Enter key, then select **Accept** on the action bar.

Select **Web Client > Charts > Tasks > E-Sign > Images > Select Image > Sign**



Enter Passphrase

After the scanned document has been signed, it will no longer display in the E-Sign queue.

NOTE: The Electronic Signature behavior control **Remember Passphrase**, when set to allow, adds functionality in which the passphrase may be entered once during an electronic signature session. Once the passphrase is entered the system will hold the passphrase up to 24 hours.

Signing for Other Physicians

The ability exists for a physician to electronically sign for another physician. To do this, the Physician Security Table, page two **Authorized to Sign Documents for** field must be set up with the physician numbers of those providers. See [Authorized to Sign Documents for Other Physicians](#)²³. If Chartlink Group code(s) have been entered for providers on page 2 of the same table, then selecting the Physicians Group option will display a list of the providers that have the same 3 character code in their Physician Security setup.

From the Tasks screen E-Sign folder, select the Covering and/or Physicians Group check box at the top. The list should refresh and display (if present) the unsigned items for the providers that are set up in Physician Security to sign for others and any providers within the same Physicians Group (Chartlink Group).

Select **Web Client > Charts > Tasks > E-Sign > Covering**

The screenshot shows the TruBridge E-Sign interface. The top navigation bar includes 'TruBridge', 'Charts', 'Tasks', and a user profile 'KW'. Below the navigation bar, there are several tabs: 'View', 'Edit', 'Sign', 'Amend', 'Addend', 'Key Maintenance', and 'Refresh'. The main content area is titled 'Alerts For: WILLIAMS KATHERINE ELISE'. On the left, there is a sidebar with various task categories like 'E-Sign (52)', 'Abnormal Labs (12)', 'CDS Alerts (22)', etc. The main area displays a table of tasks with columns: Patient Name, Edit Req., Description, Admit, Discharge, Status, Encounter, and Provider Name. The 'Covering' checkbox is checked, and the 'Provider Name' column is highlighted in red. A blue arrow points to the 'Covering' checkbox.

Patient Name	Edit Req.	Description	Admit	Discharge	Status	Encounter	Provider Name
WINDSOR MICHAEL AN...		ASPIRIN 32...	07/25/2017	08/28/2019	COSIGN	358951	WATSON KELLY
CUNNINGHAM CAROLIN...		ASPIRIN 32...	02/29/2016	06/07/2019	COSIGN	358910	WATSON KELLY
ROGERS JESSICA I		REGULAR DI...	10/06/2015	01/15/2019	Verbal	357923	WATSON KELLY
ROGERS JESSICA I		BASIC META...	10/06/2015	01/15/2019	Verbal	357923	WATSON KELLY
BUSHLEY BABY		CBC W/DIFF	01/20/2016	12/13/2018	Verbal	359852	WATSON KELLY
BUSHLEY BRYCE		ASPIRIN 32...	12/14/2018		COSIGN	369258	WATSON KELLY
BRODY JAMES FRANCES		CT ABDOME...	05/28/2015		Verbal	357849	DONALD HARPER
HARTLEY ADDISON		ALBUMIN	05/10/2016	06/11/2019	Verbal	357946	DONALD HARPER
ERICSON MATHEW		IBUPROFEN...	05/06/2016		Verbal	357943	DONALD HARPER
BRODY WILLIAM FRANCES		Assisted bath	05/13/2016		Verbal	357947	DONALD HARPER
BRODY WILLIAM FRANCES		VS - Q 4 Hours	05/13/2016		Verbal	357947	DONALD HARPER
BRODY WILLIAM FRANCES		ZOLPIDEM (...)	05/13/2016		Verbal	357947	DONALD HARPER
BRODY WILLIAM FRANCES		FUROSEMID...	05/13/2016		Verbal	357947	DONALD HARPER
ERICSON MATHEW		ONDANSET...	05/06/2016		Phone	357943	DONALD HARPER

E-Sign - Covering

NOTE: Please refer to the Joint Commission and CMS Conditions of Participation for guidelines on the circumstances and mechanisms under which one Licensed Practitioner could authenticate for another Licensed Practitioner.

3.4 Future Orders

The provider is able to Electronically Sign Future Orders placed by hospital personnel from in the Future Orders folder.

1. Select **Future Orders**.

Select **Web Client > Charts > Tasks > Future Orders**

The screenshot shows the TruBridge web client interface. The left sidebar contains a list of alerts and tasks, including 'Future Orders (2)'. The main content area is titled 'Patients With Unreleased Future Orders' and features a 'Display:' dropdown set to 'My Patients', radio buttons for 'Unreleased' and 'Unsigned', and date filters for 'Orders From' (4/2/2024) and 'To' (5/2/2024). Below these filters is a table with the following data:

Patient Name	DOB	Sex	Ordering Provider
CUNNINGHAM CAROLINE LO	01/15/1981	F	DAVID MCCUNE MD
SMITH GUS B	02/05/1964	M	

Patients With Unreleased Future Orders

2. All patients with unreleased Future Orders (Hospital Orders) will display with the patient name, date of birth, gender and ordering provider.

Select **Web Client > Charts > Tasks > Future Orders > Select Patient**

TruBridge
 Sign Selected Orders Cancel Selected Orders Refresh

Future Orders
 Sign Selected Orders

Patient: CUNNINGHAM CAROLINE LO DOB: 01/15/1981
 Display: Unreleased Unsigned

Orders From: 4/2/2024 To: 5/2/2024

Order	Expires	Status
<input type="checkbox"/> CT HEAD W/NO CONT Beginning 05/20/2024, Every 2 week(s) on Monday for 4 occurrences	Expires: 04/29/2025	UNSIGNED
<input type="checkbox"/> CT HEAD W/NO CONT Beginning 05/20/2024, Every 2 week(s) on Monday for 4 occurrences	Expires: 04/29/2025	UNSIGNED
<input type="checkbox"/> CT HEAD W/NO CONT Beginning 05/20/2024, Every 2 week(s) on Monday for 4 occurrences	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> CT HEAD W/NO CONT Beginning 05/20/2024, Every 2 week(s) on Monday for 4 occurrences	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> NEBULIZER INITIAL TREATMENT X1 on 04/29/2024	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> Discharge Instruction to Patient: Take medication as prescribed X1 on 04/29/2024	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> Insulin REG (Humulin R) 100U/ML X1 on 04/29/2024	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> IV Site Care: Clean and place small bandage on injection site X1 on 04/29/2024	Expires: 04/29/2025	UNSIGNED
<input checked="" type="checkbox"/> ROCEPHIN/DSW INPB: 1GM/50ML X1 on 04/29/2024	Expires: 04/30/2025	UNSIGNED
<input checked="" type="checkbox"/> Insulin REG (Humulin R) 100U/ML X1 on 04/29/2024	Expires: 04/30/2025	UNSIGNED
<input checked="" type="checkbox"/> LISINAPRIL (PRINIVIL) 10 MG TAB X1 on 04/29/2024	Expires: 04/30/2025	UNSIGNED

Future Orders

- Once the provider selects the patient's name, the Future Orders List displays.
 - The provider has the option to display **Unreleased** or **Unsigned** orders. Unsigned will be the default option when the Future Orders screen is selected.
 - The provider selects the order by selecting the check box next to the name of the order. After selecting the order, the provider has the following options from the action bar:
 - Sign Selected Orders:** The provider is prompted to **Enter Passphrase**. After entering the passphrase select **Accept**.
 - Cancel Selected Orders:** Allows unreleased orders to be canceled.
 - Refresh:** Refreshes the screen to update to most current Unreleased/Unsigned orders.

NOTE: The system has the capability to remember a physician's passphrase for up to 24 hours with the appropriate security. The Electronic Signature behavior for the UBL in System Management must have **Remember Passphrase** set to Allow.

NOTE: When logged in as an employee, the only option available is **Cancel Selected Orders**.

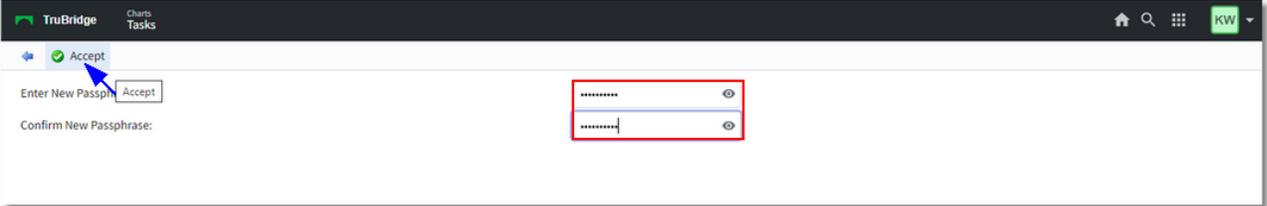
For more information, please view the [Future Orders User Guide](#).

3.5 Key Maintenance

The Electronic Signature Passphrase must be defined before any documents may be electronically signed or it may be changed anytime the physician feels security has been compromised. The Passphrase applies the physician's signature to the transcribed document.

Select the **Key Maintenance** option from the navigation panel.

Select **Web Client > Charts > Tasks > E-Sign > Key Maintenance**

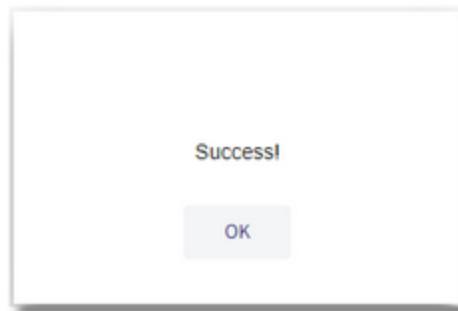
The screenshot shows the TruBridge web client interface. At the top, there is a navigation bar with 'TruBridge' on the left and 'Charts Tasks' on the right. Below the navigation bar, there is an 'Accept' button with a green checkmark icon. The main content area contains two input fields for entering a new passphrase. The first field is labeled 'Enter New Passphrase' and the second is labeled 'Confirm New Passphrase:'. Both fields contain masked characters (dots) and have a red box around them. There are also eye icons next to each field to toggle visibility. The 'Accept' button is also visible in the top left corner of the main content area.

E-Sign - Key Maintenance

Enter the passphrase the signed on employee or physician will be using. The Passphrase must have a minimum of ten characters, and include one upper-case alphabetic character, one lower-case alphabetic character and one numeric character. No special characters should be used.

After entering the passphrase and confirming it, press the Enter key and then select **Accept** on the action bar.

If the passphrase is entered in correctly, a box will then display "Success!" Select **OK** to close the display.



E-Signature - Passphrase

3.6 Reporting Signed Positive Cancer Cases

Pathologists have the ability to report positive cancer cases to the state registry. When the **State Registry Reporting** switch is selected (yes) in their Physician Security, page 3, a prompt will display at the time of electronically signing cancer cases to report/send signed positive cancer reports to the state registry. Please see the [Table Maintenance - Control User Guide](#) for information regarding the State Registry Reporting control switch.

The **Edit** option must be selected prior to save/signing the report for the prompt to appear.

After **Save/Sign** has been selected in Microsoft® Word and the passphrase has been applied, a prompt will display the following:

Would you like to send this as a Cancer Reportable?

Send results for:

Patient: [Patient Name]

Visit #: [Patient Account Number]

Case Number: [Pathology Case Number]

Case Type: [Pathology Case Type]

Specimen Type: [Pathology Specimen Type]

Order #: [Pathology Case Order Number]

To send, select **OK**.

- Select **OK** to send the electronically signed positive cancer report to the state registry.
- Select **CANCEL** to prevent the electronically signed cancer report from being sent to the state registry.

Chapter 4 Reports

Reports related to Electronic Signature

4.1 Cosign Verbal Orders Report

The Cosign Verbal Orders Report has been moved to Report Dashboard and may now be accessed via Web Client. This report will show all Cosign, Verbal, Phone, and Protocol orders that have not been signed by the individual provider or for a group of providers.

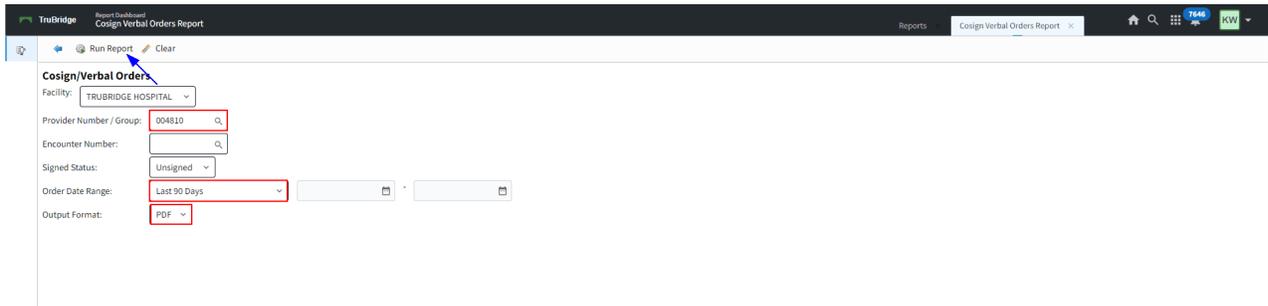
Select **Web Client > Application Drawer: Report Dashboard > Add > Locate Cosign Verbal Orders Report > Select** and then select **Insert** or double-click the **Report Title > From Report Dictionary, double-click the Cosign Verbal Orders Report**

Report Dashboard - Cosign Verbal Orders Report

- **Facility:** This will default to the user's current facility.
- **Provider Number / Group:** This is a look-up option for an individual provider's Name or by Provider Number/Group. (Group Codes are typically up to 3 characters.) Selecting a Group will show all providers in that group's cosign, phone, verbal, and protocol orders.
Note: If this field is left blank, the user will be taken to a screen to show a listing of providers and their total number of outstanding unsigned orders. If ALL are selected, a Cosign Verbal Order Summary Report with those providers names and totals will appear. This does not have the order detail in the report pictured below.
- **Encounter Number:** The Encounter Number look-up option allows the option to search by Patient Name or by the specific Encounter (account) Number. This will narrow the report to show cosign and verbal orders for a single patient visit.
- **Signed Status:** The options allow the report to be run to include Unsigned only, Signed orders only, or Both Signed and Unsigned orders.
- **Order Date Range:** Manual Selection is the default option and allows the user to enter a specific date range MM/DD/YYYY - MM/DD/YYYY. Other search options in the drop-down include Previous Day, Previous Week, Previous Month, Previous Quarter, Previous Calendar Year, Previous Fiscal Year, Last 7 Days, Last 30 Days, and Last 90 Days.
- **Output Format:** Output format options are CSV or PDF.

Once the fields have been selected (or left blank) select **Run Report** in order to generate the report in CSV or PDF format.

Select Web Client > Application Drawer: Report Dashboard > From Report Dictionary, double-click the Cosign Verbal Orders Report > Enter Search Parameters



Report Dashboard - Cosign Verbal Orders Report

When Run Report is selected, a preview screen will appear where the information may be viewed. Selecting View/Print will display the report in the selected format: CSV or PDF.

Select Web Client > Application Drawer: Report Dashboard > From Report Dictionary, double-click the Cosign Verbal Orders Report > Enter Search Parameters > Run Report

Order Date	Patient Name	Encounter	Ordering Provider	Order Number	Order Description	Signing Provider	Signing Provider#	Order Type	Order Status	Signed Status	Signed Date/Time
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell		ADMIT TO DR.Tidwell			Verbal		Unsigned	
07/15/2024 13:14	FOSTER WILLIAM	70001560	Jennifer Tidwell	4268781	GLUCOSE DAILY			Phone		Unsigned	
07/15/2024 13:15	FOSTER WILLIAM	70001560	Jennifer Tidwell	2201289	OXYGEN DAILY RENTAL			Phone		Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	4268781				Phone	DC	Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	4268782				Phone	DC	Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	4000137	Jennifer Tidwell	4268785	GLUCOSE DAILY			Phone		Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	4268783				Phone	DC	Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	2201291				Phone	DC	Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	2201289				Phone	DC	Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	4000137	Jennifer Tidwell	2201292	OXYGEN DAILY RENTAL			Phone		Unsigned	
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	2201290				Phone	DC	Unsigned	
07/15/2024 14:02	FOSTER WILLIAM	70001560	Jennifer Tidwell	5520670	CLEAR LIQUID DIET			Phone		Unsigned	
07/15/2024 14:22	FOSTER WILLIAM	4000137	Jennifer Tidwell	5520671	CLEAR LIQUID DIET			Phone		Unsigned	
07/15/2024 14:22	FOSTER WILLIAM	70001560	Jennifer Tidwell	5520670				Phone	DC	Unsigned	
07/24/2024 12:34	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		V/S Q4Hrs	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3
07/24/2024 12:34	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		CBC WITH AUTOMATED DIFF	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3
07/24/2024 12:34	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		TROPONIN I	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3
07/24/2024 12:35	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		Admit as Medical Inpatient	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3
07/24/2024 12:35	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		CHEST PA AND LATERAL	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3
07/24/2024 12:35	SAMUEL-ADELAIDE	AEC91119	Katie Whiddon		AMOXICILLIN S	Katie Whiddon	553676	COSIGN		Pending Cosig...	07/24/2024 12:3

Physician Order Detail List

Report Output will include the following data:

- **Date/Time** the order was entered
- **Patient Name**
- **Patient Account number**
- **Ordering Provider** - Name of provider entering the Cosign order or Phone, Verbal, Protocol orders entered by Nursing staff.
- **Order Number** (if ancillary or pharmacy order)

- **Order Description**
- **Signing Provider** - Name of Provider that has signed (if running to include Signed orders.) If the Order Type is Cosign, then the provider that entered and signed the order's name will display.
- **Signing Provider Number** - The physician number attached to the provider's login will populate if the report is run to include Signed orders. If the Order Type is Cosign, then the provider that entered and signed the order's name will display.
- **Order Type** - Phone, Verbal, Protocol, or Cosign.
- **Order Status** - Displays if status is of the unsigned order is Discontinue (DC) or Renew.
- **Signed Status** - Unsigned, Signed, Pending Cosignature, Cosigned
- **Signed Date/Time** - Date/Time that the order was Signed by the provider. If it is a Cosign order, this will reflect the Date/Time that the original provider Signed the orders.
- **Cosigned User** - Name of the provider that entered the Cosign order.
- **Cosigned Date/Time** - Date/Time that the order was Cosigned by the provider.

Select Web Client > Application Drawer: Report Dashboard > From Report Dictionary, double-click the Cosign Verbal Orders Report > Enter Search Parameters > Run Report > View/Print

TRUBRIDGE HOSPITAL							WHIDDON KATIE
Cosign Verbal Order Detail Report							07/24/2024
							12:39
Order Date:	Patient Name:	Patient Account Numbr	Ordering Provider:	Order Number:	Order Description:	Signing Provider:	
Signing Provider Number:	Order Type:	Order Status:	Signed Status:	Signed Date Time:	Cosigner User:	Cosigned Date Time:	
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	ASSESS & PLAN D/C NEEDS		
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	ACCURATE I&O & WEIGHT Q2 DAYS		
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	PT EDUCATION PER PATHWAY		
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	VS Q4X24, THEN QSHIFT		
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	FULL CODE STATUS		
06/27/2024 10:47	ADAMS GEORGE	70001272	Jennifer Tidwell	Unsigned	ADMIT TO DR.Tidwell		
07/15/2024 13:14	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	GLUCOSE DAILY		
07/15/2024 13:15	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	OXYGEN DAILY RENTAL		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 13:20	FOSTER WILLIAM	4000137	Jennifer Tidwell	Unsigned	GLUCOSE DAILY		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 13:20	FOSTER WILLIAM	4000137	Jennifer Tidwell	Unsigned	OXYGEN DAILY RENTAL		
07/15/2024 13:20	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	DC		
07/15/2024 14:02	FOSTER WILLIAM	70001560	Jennifer Tidwell	Unsigned	CLEAR LIQUID DIET		

TRUBRIDGE HOSPITAL
Cosign Verbal Order Detail Report

WHIDDON KATIE
 07/24/2024
 12:39

07/15/2024 14:22	FOSTER WILLIAM	4000137 Phone	Jennifer Tidwell	5520671 Unsigned	CLEAR LIQUID DIET		
07/15/2024 14:22	FOSTER WILLIAM	70001560 Phone	Jennifer Tidwell DC	5520670 Unsigned			
07/24/2024 12:34 553676	SAMUELADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	V/S Q4Hrs 07/24/2024 12:37	004810	Katie Whiddon
07/24/2024 12:34 553676	SAMUELADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	CBC WITH AUTOMATED DIFF 07/24/2024 12:37	004810	Katie Whiddon
07/24/2024 12:34 553676	SAMUELADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	TROPONIN I 07/24/2024 12:37	004810	Katie Whiddon
07/24/2024 12:35 553676	SAMUELADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	Admit as Medical Inpatient 07/24/2024 12:37	004810	Katie Whiddon
07/24/2024 12:35 553676	SAMUEL ADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	CHEST PA AND LATERAL 07/24/2024 12:37	004810	Katie Whiddon
07/24/2024 12:35 553676	SAMUEL ADELAIDE	AEC91119 COSIGN	Katie Whiddon	Pending Cosignature	AMOXICILLIN S 07/24/2024 12:37	004810	Katie Whiddon

Cosign Verbal Order Detail Report

Chapter 5 HIM Transcription Reports

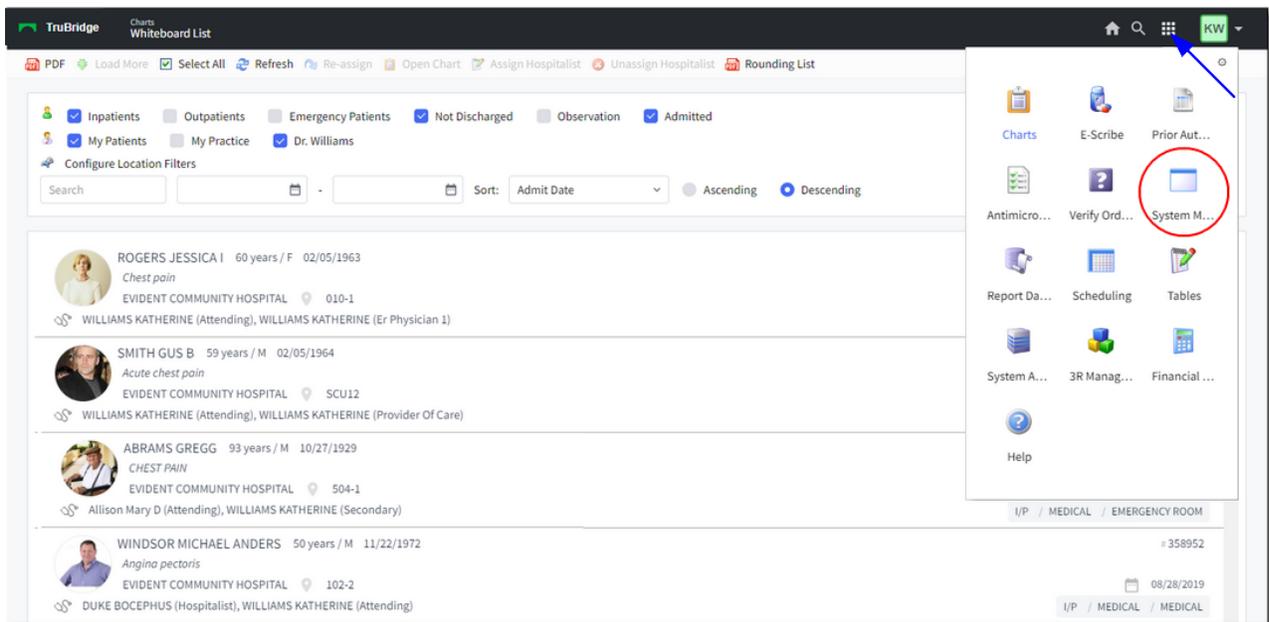
The Health Information Management Reports for E-Sign deficiencies are located in the [HIM Print Reports User Guide](#), Chapter 15. There are also other Transcription Reports in Chapter 8 of the same User Guide.

Chapter 6 Ancillary Transcription Reports

6.1 Overview

This section will be an overview of the reports that are available from the Hospital Base Menu-Department Specific to track and review Electronic Signature.

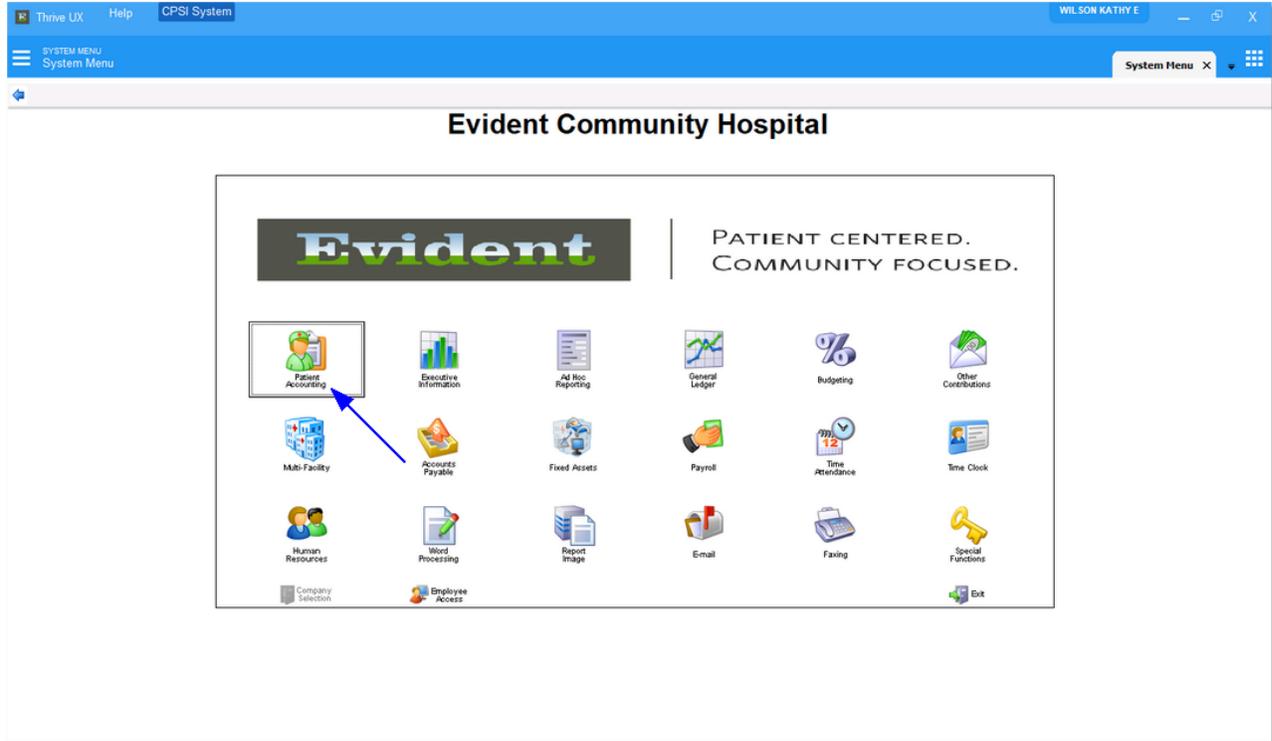
Select Web Client > System Menu



Whiteboard List

If directed to the Main Menu, select System Menu to access Patient Accounting.

Select **Web Client > System Menu > Patient Accounting**



Patient Accounting

1. From the Hospital Base Menu, select **Department Specific**.

Select **Web Client > System Menu > Hospital Base Menu > (from Ancillary Department) > Department Specific**

← Evident Community Hospital Signed On Phy: ACS Dept: 036

Hospital Base Menu

Sign Off Change Department Patient List Print Reports PQC Access Phys Phone/Fax

Enter Patient Account #:

Patient Functions	Clinical Functions	Other Functions
Profile Listing	Miscellaneous Clinical Monitoring	Department Specific
Temporary Account Registration	Order Verification	Master Selection
Call Referral Registration	Incoming Orders and Reports	Charge Tables and Inventory
Appointment Scheduling	Dictation	Communications
Medical Necessity Lookup	Electronic Signature	Patient Tracking
Release of Information	Electronic Signature for Images	Registration Edits
History Account Setup	Enter Order Number	Other Applications and Functions
		Whiteboard Check-In
		Clinic Whiteboard
		Temporary Orders

Hospital Base Menu

2. From the Ancillary Department Functions menu, select **Transcription Send Fail Log**.

Select **Web Client > System Menu > Hospital Base Menu > Department Specific > E-Sign Functions**

The screenshot displays the web client interface for Evident Community Hospital. The header shows the hospital name and the user's signed-on information (Phy: ACS, Dept: 036). The main content area is titled 'Imaging Services - Ancillary Department Functions' and is divided into three sections:

- Department Functions:** A list of 16 items including Change Film Locations, Scheduled Exams, Film Analysis, Mammo System, Statistics Input, Result Entry, QC Quick Entry/Review, QC Data Management Reports, Patient Prep/Item Information, Patient Education Documents, Patient Education Maintenance, Infection Control System, Unreviewed Results, and Reference Range Table.
- Department Schedules:** A list of 2 items: Imaging Services and Other Departments.
- Esign Functions:** A sub-menu highlighted with a red box, containing 6 items: Transcription Send Fail Log, Document Audit Trail, Overdue Signatures, Overview Report, Order Tracking, and Returned for Edit.

Ancillary Department Functions

6.2 Transcription Send/Fail Log

The Transcription Send Fail Log includes electronic signature transcriptions from orders that have been signed but failed to complete the signing process resulting in failed distribution. The system automatically generates these reports back to the physician's Electronic Signature Queue and records these failures in the Transcription Send/Fail Log. The report includes the following: Patient Name, Order Number, Signing Physician and Destination information from the REPDIST mnemonic on OEWORDES transcription header.

How to Print

Select **Web Client > System Menu > Hospital Base Menu > Department Specific > Transcription Send Fail Log**

Transcription Send Fail Log

Select a log

MM/DD/YY

02/05/15

02/05/15

Enter: ___

Exit

Transcription Send Fail Log Selection

1. From the Hospital Base Menu, select **Department Specific**.
2. Select **Transcription Send Fail Log**.
3. The Transcription Send Fail Log screen will be displayed. A list of up to 10 logs by date will be displayed beginning with the most recent. A new log is created only when the system captures

data from failed electronic signatures. The existing logs move down the list and the last log is deleted.

4. Select the appropriate date.

Select **Web Client > System Menu > Hospital Base Menu > Department Specific > Transcription Send Fail Log > Select Date**

Transcription Send Fail Log

Log for date: 02/05/15

COLE BARBARA 5209837 JENNIFER RHODES
Copy for: XRAY MAMMO LOC via fax

Enter: __ Exit PgUp PgDn Print

Transcription Send Fail Log

5. The Transcription Send Fail Log for the selected date will be displayed. Select one of the following options:

- **Exit:** To return to the previous menu.
- **PgUp:** To return to previous page
- **PgDn:** To advance to the next page
- **Print:** To print the selected log

Description and Usage

The Transcription Send Fail Log includes electronic signature transcriptions from orders that have been signed but failed to complete the signing process resulting in failed distribution. The report includes the following: Patient Name, Order Number, Signing Physician and Destination.

Transcription Send Fail Log

Patient Name	Order Number	Signing Physician	Destination
SMITH ELLA KATHERINE	5232778	ROGERS RYAN	Copy for: BAXTER JAMES via modem
BOLTZ CAROLINE	5232254	ROGERS RYAN	Copy for: WALKER ALBERT via fax
WILLIAMS HENRY	5231437	ROGERS RYAN	Copy for: BAXTER JAMES via modem
SMITH ELLA KATHERINE	5232547	ROGERS RYAN	Copy for: WALKER ALBERT via fax
ADAMS JANE	5232776	ROGERS RYAN	Copy for: BAXTER JAMES via modem
BERRY WILLIAM	5232732	ROGERS RYAN	Copy for: JONES SANDY via link
MARTIN JOSHUA	5232441	ROGERS RYAN	Copy for: JOHNSON JOE S via fax
SMITH ELLA KATHERINE	5232675	ROGERS RYAN	Copy for: BAXTER JAMES via modem
SMITH ELLA KATHERINE	5232617	ROGERS RYAN	Copy for: BAXTER JAMES via fax
JONES JOHNNY T	5232741	ROGERS RYAN	Copy for: BENDELL via fax

Listed below is an explanation of each column:

- **Patient Name:** Patient name pulling from the Registration and ADT screen.
- **Order Number:** Seven digit Order number of the procedure generated during order entry.
- **Signing Physician:** Physician Name or midlevel provider which signed the transcription.
- **Destination:** The destination and mode of the copy which failed for report distribution. This pulls from the REPDIST mnemonic on the OEWORDES transcription header .

6.3 Document Audit Trail

The Document Audit Trail allows signed transcribed documents for the logged in department to be viewed and printed. These documents may be sorted alphabetically by patient or physician name.

1. From the Hospital Base Menu, select **Department Specific**.
2. Select **Document Audit Trail**.

Select Web Client > System Menu > Hospital Base Menu > Department Specific > Document Audit Trail

Evident Community Hospital										Signed On Phy: ACS Dept: 036			
Electronic Signatures													
View		Print		Select ALL		Refresh		Select Printer					
As Of: 06/23/15												Printer: Not Selected	
Patient	Order	Description	Physician	Status	Initials	Date	Time	Version					
COOPER JOSEPH M	20934	ABDOMEN SUPINE & UPRIGHT	SMITH A	COSI	ACS	06/23/15	13:43	000					
FAULKNER JEFF	20931	CT ABDOMEN W/WO CON	SMITH A	SIG	ACS	06/23/15	15:22	000					

Document Audit Trail

- The initial display will include signed documents as of the current system date, sorted alphabetically by patient name.
- This display also includes the following information:
 - **Patient:** Patient Name pulling from the Registration and ADT screen.
 - **Order:** Order number of the procedure generated during order entry.
 - **Description:** Procedure Description pulling from the Item Master.
 - **Physician:** Name of signing physician
 - **Status:** Status of the transcribed document
 - **AM:** Amended/Unsigned: Previously signed document is amended, but unsigned.
 - **AMS:** Amended/Signed: Previously signed document is amended and signed.
 - **AD:** Addended/Unsigned: Previously signed document is addended, but not signed.
 - **ADS:** Addended/Signed: Previously signed document is addended and signed.
 - **SIG:** Signed: Document is signed, not canceled or discontinued.
 - **COSI:** Co-sign: Document is signed by midlevel provider but needs to be co-signed by supervising physician
- Initials of the last person that transcribed or edited the document
- The date and time the document was last accessed for transcription or editing
- **Ver#:** Version Number - When applicable.
 - **Blank:** The most recent version of the document.
 - **Version 1:** The original version of the document when signed the first time.

- **Version 2:** The version of the document when signed after the first amend/addend.
- **Version 3:** The version of the document when signed after the second amend/addend.

NOTE: Each of the columns may be sorted by selecting the column description.

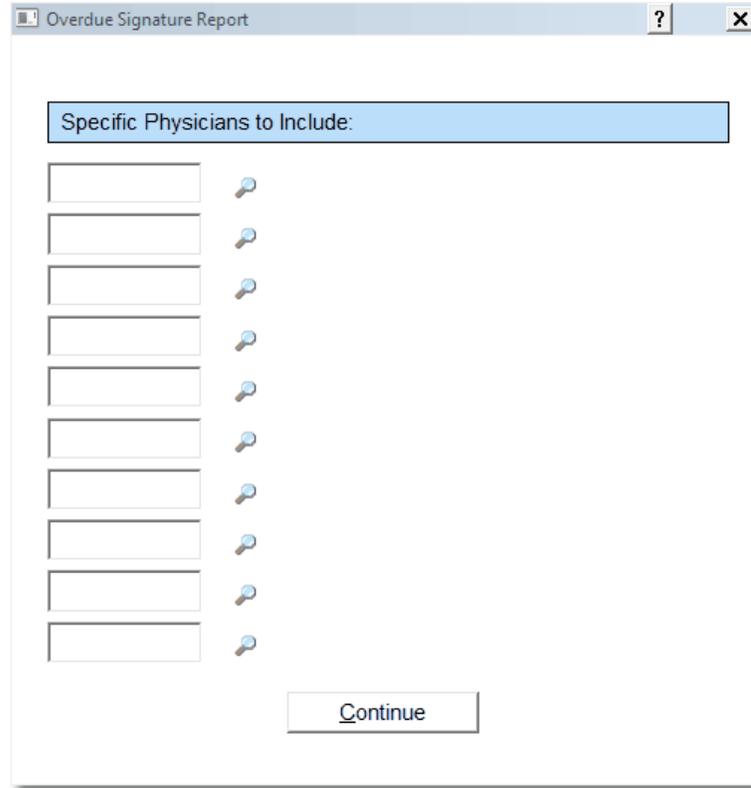
- The following options may be selected:
 - **As Of:** Displays all signed documents with signed dates equal to or later than the date entered in this field. There is a drop-down calendar available.
 - **View:** Displays the selected transcribed document(s).
 - **Print:** Prints the selected documents on the previously selected printer.
 - **Select All:** Selects all displayed documents for processing.
 - **Refresh:** Updates the display with the appropriate information.
 - **Select Printer:** Select the desired print options. The selected printer will be indicated in the Select Printer window and the previous menu will be displayed.
 - **Exit:** Returns to the Ancillary Department Functions menu.

6.4 Overdue Signatures

The Overdue Signatures report provides a list of delinquent transcribed orders by physician or midlevel provider. This report sorts numerically by physician number, then numerically by patient account number. The number of days after which an unsigned transcription is considered overdue is determined individually for each signing physician in special functions physician security.

How to Print

1. From the Hospital Base Menu, select **Department Specific**.
2. From the Ancillary Department Functions menu, select **Overdue Signatures**. The system will prompt for the selection of physicians.



Overdue Signature Report

Specific Physicians to Include:





































































Overdue Signature Report

3. Specific physicians may be selected by entering the physician Number or select the magnify glass for a lookup box. Select **Continue** for the selected physicians or all Overdue Signatures will display if no specific physician is selected.

Description and Usage

The Overdue Signatures report provides a list of delinquent transcribed orders by physician or midlevel provider. This report sorts numerically by physician number, then numerically by patient account number. The number of days after which an unsigned transcription is considered overdue is determined individually for each signing physician in special functions physician security.

Electronic Signature Overdue Report

RUN DATE: 04/06/15 TIME: 08:31		Evident Community Hospital Electronic Signature Overdue Report				PAGE 1 RCSIGNODP		
Physician name	Patient name & number	Order #	Sig OD after Descript	Scheduled	Completed	Transcribed	Days OD	In Progress
ROGERS RYAN L			1					
SMITH ELLA KAT	00123548	5229458	ANKLE COMPLETE, RIGHT	03/28/15	03/28/15	03/28/15	7	N
SMITH ELLA KAT	00123548	5229459	CHEST PA&LAT	04/03/15	04/03/15	04/04/15	2	N
BOLTZ CAROLINE	004348	5229295	MAMMO SCREENING	04/05/15	04/05/15	04/05/15	1	N
WILLIAMS ARTHUR			0					
JAMES N GREER	002324	5231839	CHEST PA AND LAT	04/05/15	04/05/15	04/05/15	1	N
JEAN COKER	N03531	5231730	CHEST 1 VIEW	04/01/15	04/01/15	04/05/15	1	N
JEAN COKER	N03531	5231738	ANKLE AP & LAT, BILATERAL	04/01/15	04/01/15	04/05/15	1	N
BAXTER JAMES			2					
SANDERSON JOSHU	103080	5230240	CHEST 2 VIEWS	04/03/15	04/03/15	04/04/15	2	N
SPENCER RICHARD	417764	5229602	CHEST 2 VIEWS	04/02/15	04/03/15	04/03/15	3	N
RICHARDS JENNIFER	494951	5232047	CT ABDOMEN /PELVIS	04/03/15	04/03/15	04/04/15	2	N

Listed below is an explanation of each column:

- **Physician Name:** Physician Name or midlevel provider.
- **Sig OD After:** Number of days after which signature is considered overdue from the physician security.
- **Patient name & Number:** Patient name and Account Number pulling from the Registration and ADT screen.
- **Order #:** Order number of the procedure generated during order entry.
- **Descript:** The name of the procedure from the order. This pulls from the item description in the Item Master.
- **Scheduled:** Scheduled date of procedure from the Order Entry Maintenance.
- **Completed:** Completed date of procedure from the Order Entry Maintenance.
- **Transcribed:** Transcribed date pulls from the Result Date in Order Entry Maintenance.
- **Days OD:** Number of days the transcribed report is overdue.
- **In Progress: Yes or No,** if the Electronic Signature is in progress.

Transcriptions will not be moved to Clinical History until they are electronically signed. Documents requiring multiple signatures will not move to Clinical History until all needed signatures are obtained. In addition, unsigned transcriptions are not automatically purged with incomplete orders.

6.5 Overview Report

The Overview Report will include transcribed documents that have been returned to the transcribing user for further editing by the physician through Electronic Signature. This report will sort by physician or transcribing user and will include any comments associated with the document.

The Overview Report provides a list of transcriptions placed against orders within a specified date range. It may be generated to include all Unsigned documents, all documents on hold by the transcribing user, all Signed documents, Overdue Signatures, documents returned for edit by the physician, editing required by the transcribing user and all orders not transcribed.

How to Print

1. From the Hospital Base Menu, select **Department Specific**.
2. From the Ancillary Functions menu, select **Overview Report**.
3. The system will prompt options to define the report.

OE E-Sign Overview Report

Transcription Date Range:

All Dates:

Beginning Date: 06/23/15 0

Ending Date: 06/23/15 0

E-Sign Documents:

All Unsigned Documents

All Documents on Hold

All Signed Documents

Overdue Signatures

Returned by Physician

Editing Required

Not Transcribed

Orders

Edit Comments/Return Notes:

Include Return Notes

Include Edit Comments

OE Prefix:

OE Prefix:

Control Heading:

Transcriptionist

Control Heading Sort Order:

Transcriptionist Initials: 1

Physician Name: 1

Physician Number: 2

Detail Sort Order:

Transcriptionist Initials:

Physician Name: 1

Physician Number: 2

Patient Name: 3

Patient Number: 4

Document I.D.: 5

Document Description: 6

Admit Date:

Discharge Date:

Generate

E-Sign Overview Report

4. From the OE E-Sign Overview Report screen, define the following:

- **Transcription Date Range**

- All Dates
- Beginning Date
- Ending Date

- **E-Sign Documents**

- **All Unsigned Documents:** Will include orders with overdue signature, orders returned by the physician, orders that require editing by physicians or co-signing for midlevel providers, all orders on hold and all signed documents. May be sorted by transcribing user or dictating physician.
- **All Documents On Hold:** Will include orders/transcriptions that have been placed on hold by the transcribing user. This information will list on the **Outstanding Transcriptions Report**.
- **All Signed Documents:** This option will include all signed documents. May be sorted by transcribing user or dictating physician.

- **Overdue Signatures:** Will include all orders that have not been signed and exceed the number of days loaded in the physician maintenance table. May be sorted by transcribing user or dictating physician.
- **Returned by Physician:** Will include all orders that have been reviewed by the physician and returned to the transcribing user. May be sorted by transcribing user or dictating physician.
- **Editing Required:** Will include all orders that have been sent to the physician from the transcribing user requiring edit. May be sorted by transcribing user or dictating physician.
- **Medical Records, Orders or Both:** This option determines what type of esign document will be included.

NOTE: A listing that states **cosign for (midlevel name)** will display for any Midlevel providers that require a co-signature.

- **Control Heading:** This option determines the primary sort and how the report page breaks.
 - transcribing user
 - Signing Physician
 - Dictating Physician
- **Control Heading Sort Order:** This option defines the sort for the Control Heading. If the primary sort is by transcribing user, the only sort option is by initials. If the primary sort is Signing or Dictating physician, the sort may be by physician name or number.
- **Detail Sort Order:** This option allows the choice of the order in which the detail sorts.
 - Patient Name
 - Patient Number
 - Admit Date
 - Discharge Date
 - Document I.D.
 - Document Description
 - Physician Name
 - Physician Number
- **Return Notes/Edit Comment:** When an order is returned to the transcribing user or physician, an edit box appears allowing up to 4 lines of text. This option allows the entered text to be included in this report. Selection of one or both is available.
 - Include Return Notes
 - Include Edit Comments

5. Once the criteria have been defined, select **Generate** to generate the report.

Description and Usage

The Overview Report provides a list of transcriptions placed against orders within a specified date range. It may be generated to include all Unsigned documents, all documents on hold by the transcribing user, all Signed documents, Overdue Signatures, documents returned for edit by the physician, editing required by the transcribing user and all orders not transcribed.

Overview Report - including all transcriptions signed

RUN DATE: 04/07/15 TIME: 12:11	Evident Community Hospital MR ELECTRONIC SIGNATURE DEFICIENCY REPORT DEFICIENCIES FROM: 04/06/10 TO: 04/07/10 FOR SIGNING PHYSICIAN: JOHN L BAXTER	PAGE 1 MRESIGNDEFG
-----------------------------------	---	-----------------------

TRANSCRIPTIONIST INITIALS	PATIENT NAME	NUMBER	ADMIT-DATE	DISC-DATE	TYPE-DOC	DOCUMENT DESCRIPTION	
JLB	SMITH ELLA KATHERINE	10100200	04/01/15	00/00/00	OR	CHEST 2 VIEW	Signed
	SMITH ELLA KATHERINE	10100200	04/01/15	00/00/00	OR	US ABDOMEN	Signed
CCS	SMITH ELLA KATHERINE	10100200	04/01/15	00/00/00	OR	FOOT RT	Signed
	SMITH ELLA KATHERINE	10100200	04/01/15	00/00/00	OR	ABDOMEN SERIES	Signed
	SMITH ELLA KATHERINE	10100200	04/01/15	00/00/00	OR	MM SCREENING	Cosign by:
	BOLTZ CAROLINE	717035	04/03/15	00/00/00	OR	CT ABDOMEN / PELVIS W CON	Signed
	BOLTZ CAROLINE	717035	04/03/15	00/00/00	OR	ABDOMEN SERIES	Signed

Overview Report - including all transcriptions Returned for Edit by the Physician

RUN DATE: 04/07/15 TIME: 15:20	Evident Community Hospital MR ELECTRONIC SIGNATURE DEFICIENCY REPORT DEFICIENCIES FOR ALL DATES FOR TRANSCRIPTIONIST: JRB	PAGE 1 MRESIGNDEFG
-----------------------------------	--	-----------------------

PHYSICIAN NAME	PATIENT NAME	PHY NUMBER	NUMBER	ADMIT-DATE	DISC-DATE	TYPE-DOC	DOCUMENT DESCRIPTION	
JOHN L BAXTER	SMITH ELLA KATHERINE	032679	10100200	04/01/15	00/00/00	OR	CHEST 2 VIEW	Returned by Physician

RETURN-COMMENTS
Please review the second line within the transcription.

Listed below is an explanation of each column:

- **Physician Name:** Physician Name
- **Phy Number:** Physician Number
- **Patient name & Number:** Patient name and Account Number pulling from the Registration and ADT screen.
- **Admit Date:** Date of Admission pulling from the Registration and ADT screen.
- **Discharge Date:** Date of Discharge pulling from the Registration and ADT screen.
- **Type Doc:** The type of documents generated, Orders, Medical Records transcriptions or both.
- **Order #:** Order number of the procedure generated during order entry.
- **Document Description:** The name of the procedure from the order. This pulls from the item description in the Item Master.
- The last column lists the status of the document.

- Any Edit Comments from the physician or transcribing user are listed on the following line.

6.6 Order Tracking

The Order Tracking report provides a list of transcriptions placed against orders within a specified date range. It may be generated to include all Unsigned documents, all documents on hold by the transcribing user, all Signed documents, Overdue Signatures, documents returned for edit by the physician, editing required by the transcribing user and all orders not transcribed.

NOTE: *The Order Tracking report provides the same information as the Overview Report except the user is able to generate the report to pull only the orders for specific departments by entering the OE Prefix.*

How to Print

1. From the Hospital Base Menu, select **Department Specific**.
2. From the Ancillary Functions menu, select **Overview Report**.
3. The system will prompt options to define the report.

E-Sign Overview Report

4. From the OE E-Sign Overview Report screen, define the following:

- **Transcription Date Range**

- All Dates
- Beginning Date
- Ending Date

- **E-Sign Documents**

- **All Unsigned Documents:** Will include orders with overdue signature, orders returned by the physician, orders that require editing by physicians or co-signing for midlevel providers, all orders on hold and all signed documents. May be sorted by transcribing user or dictating physician.
- **All Documents On Hold:** Will include orders/transcriptions that have been placed on hold by the transcribing user. This information will list on the **Outstanding Transcriptions** Report.
- **All Signed Documents:** This option will include all signed documents. May be sorted by transcribing user or dictating physician.
- **Overdue Signatures:** Will include all orders that have not been signed and exceed the number of days loaded in the physician maintenance table. May be sorted by transcribing user or dictating physician.

- **Returned by Physician:** Will include all orders that have been reviewed by the physician and returned to the transcribing user. May be sorted by transcribing user or dictating physician.
- **Editing Required:** Will include all orders that have been sent to the physician from the transcribing user requiring edit. May be sorted by transcribing user or dictating physician.
- **Medical Records, Orders or Both:** This option determines what type of esign document will be included.

NOTE: A listing that states **cosign for (midlevel name)** will display for any Midlevel providers that require a co-signature.

- **Control Heading:** This option determines the primary sort and how the report page breaks.
 - transcribing user
 - Signing Physician
 - Dictating Physician
- **Control Heading Sort Order:** This option defines the sort for the Control Heading. If the primary sort is by transcribing user, the only sort option is by initials. If the primary sort is Signing or Dictating physician, the sort may be by physician name or number.
- **Detail Sort Order:** This option allows the choice of the order in which the detail sorts.
 - Patient Name
 - Patient Number
 - Admit Date
 - Discharge Date
 - Document I.D.
 - Document Description
 - Physician Name
 - Physician Number
- **Return Notes/Edit Comment:** When an order is returned to the transcribing user or physician, an edit box appears allowing up to 4 lines of text. This option allows the entered text to be included in this report. Selection of one or both is available.
 - Include Return Notes
 - Include Edit Comments
- **OE Prefix:** This option defines the specific ancillary department transcription orders to be included on the report. It defaults to include transcription orders for the logged in department generating the report. To include transcription orders for additional ancillary departments, enter the 2-digit ancillary prefix number in one of the blank fields.

5. Once the criteria have been defined, select **Generate** to generate the report.

Description and Usage

The Order Tracking report provides a list of transcriptions placed against orders within a specified date range. It may be generated to include all Unsigned documents, all documents on hold by the transcribing user, all Signed documents, Overdue Signatures, documents returned for edit by the physician, editing required by the transcribing user and all orders not transcribed.

Order Tracking - including all transcriptions signed

RUN DATE: 04/07/15 TIME: 15:51	Evident Community Hospital OE ORDER TRACKING REPORT DEFICIENCIES FROM: 04/07/10 TO: 04/07/15 FOR TRANSCRIPTIONIST: RCL					PAGE 2 MRESIGNDEFG
PHYSICIAN NAME PATIENT NAME	PHY NUMBER NUMBER	SCHED-DATE	TRAN-DATE	SIGN-DATE	DOCUMENT DESCRIPTION	STATUS

BAXTER JOHN L	032679					
BAXTER CAROLYN	717035	04/07/10	04/07/15	04/07/10	CT ABDOMEN /PELVIS	Signed
BAXTER CAROLYN	717035	04/07/10	04/07/15	04/07/10	CT PELVIS W W/O CONTRA	Signed
WILLIAMS ARTHUR	001004					
SMITH ELLA KATHERINE	10100200	04/07/10	04/07/15	04/07/10	MM SCREENING	Signed
SMITH ELLA KATHERINE	10100200	04/07/10	04/07/15	04/07/10	MM SCREENING	Signed
SMITH ELLA KATHERINE	10100200	04/07/10	04/07/15	04/07/10	MM SCREENING	Cosign by:
SMITH ELLA KATHERINE	10100200	04/07/10	04/07/15	04/07/10	US ABDOMINAL COMPLETE	Signed

Order Tracking - including all transcriptions Returned for Edit by the transcribing user

RUN DATE: 04/07/15 TIME: 16:02	Evident Community Hospital OE ORDER TRACKING REPORT DEFICIENCIES FROM: 04/07/15 TO: 04/07/15 FOR TRANSCRIPTIONIST: JBL					PAGE 1 MRESIGNDEFG
PHYSICIAN NAME PATIENT NAME	PHY NUMBER NUMBER	SCHED-DATE	TRAN-DATE	SIGN-DATE	DOCUMENT DESCRIPTION	STATUS

JOHN L BAXTER	032679					
SMITH ELLA KATHERINE	10100200	04/05/15	04/05/15	00/00/00	CT HEAD W/O CONTRAST	Edit Required
EDIT-COMMENTS						
Please Review the second line for accuracy						

Listed below is an explanation of each column:

- **Physician Name:** Physician Name
- **Phy Number:** Physician Number
- **Patient name & Number:** Patient name and Account Number pulling from the Registration and ADT screen.
- **Sched Date:** The Schedule Date from Order Entry Maintenance.
- **Tran Date:** The Transcribe Date which pulls the Result Date from Order Entry Maintenance.
- **Sign Date:** The Sign Date which pulls from Order Entry Maintenance.
- **Document Description:** The name of the procedure from the order. This pulls from the item description in the Item Master.
- **Status:** The last column lists the status of the document.
- Any Edit Comments from the physician or transcribing user are listed on the following line.

6.7 Physician's Initials Report

The Physician Initials report provides a method of determining if duplicate initials have been assigned in the system in regards to physicians using the electronic signature application.

NOTE: *It is important to determine whether there are duplicate initials in the physician tables. If so, the system will prompt user to select the appropriate physician during the transcription process.*

How to Print

1. From the Hospital Base Menu, select **Master Selection**.
2. From the Master Selection screen, select **Print Reports**.
3. From the Print Report Menu, select **Tables**.
4. From the Business Office Table Reports, select **Dictating Physician Initials**.
5. System will prompt to **Print "A"ll or "D"uplicates only?**:
 - **A-all** will generate a report that will list all physicians and their initials that are assigned in the system.
 - **D-duplicates** will generate a report that will list all physicians that have the same initials as another physician in the system.

Description and Usage

The Physician Initials report provides a method of determining if duplicate initials have been assigned in the system in regards to physicians using the electronic signature application.

Physician's Initials Report

PHYS INITIALS	PHYS NAME	PHYS NUMBER	USING OE	ESIGN	USING MR	ESIGN
CCD	DYER CHRISTOPHER C	200090				
CMR	ROWE CAROLYN M.	062356		N		Y
DBL	LEE DONNA B	329611				
JLB	BAXTER JOHN L.	032679		Y		N
JLB	BAXTER JAMES MD	080564		N		Y
JLH	JEFFERY HOLMES	419000				
KMM	MYERS KATE	013001		N		N
RLR	ROGERS RYAN L	032675		Y		Y
RLS	SANDERS ROBERT	001511		Y		Y
RMB	BLAKELY RANDALL M	285100		Y		Y
RMK	KIRKLAND ROSE	050104				N
SDS	SMITH MILTON	000021				Y
SPE	SPENCER WILLIAMS	100896		N		N
TKN	NEWBURN TREVOR K	062296				N
WMP	PAYNE WILLIAM MICHAEL	082490		Y		N
WPB	BUSCHMANN WILLIAM P	011899		Y		Y

The following information is included:

- **Phys Initials:** Physician Initials entered in Physicians Table.
- **Phys Name:** Physician Name pulling from Physicians Table.
- **Phys Number:** Physician Number pulling form Physicians Table.
- **Using OE E-sign:** Y or N, pulling from **Use Electronic Signature** in Physician Security Table.
- **Using MR E-sign:** Y or N, pulling from **Use MR Electronic Signature** in Physician Security Table