## How to save & finalise Draft Documents

## Finalising a Document

There are 2 different ways to finalise your document:

- Completing and finalising your document **without saving as a draft** at the time you originally create or
- Finalising your document after it has been saved as a draft.
- a. After you have completed your letter, it can be finalised immediately using **Save and Finalise**. This letter will go to the Document Signing screen for the clinician to sign (in the View drop-down menu at the top of the screen)



b. If documents have been Saved as Draft they need to be retrieved from Draft Documents



Reference No: DC013a/EH/V2

## **Draft Dcouments**

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All documents in **Your** Draft Documents are displayed. These are documents that **have not been signed/sent** 

- 1. Check the Finalised Column for the Finalisation status:
  - a. If a document has not been finalised it will display with a x
  - b. If a document has been finalised but not signed by clinician it will display 🗸

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- 2. Select the document to be edited/finalised
  - a. the document can be Reassigned, Finalised or Rejected. To finalise the document, select **Finalise**



Documents that have been finalised HAVE NOT BEEN SIGNED AND WILL DISPLAY IN THE CLINICIAN DOC SIGNING TAB

Reference No: DC013a/EH/V2