

Document Creation – How to Sign a Document

Scenario/ Information

You have created a document in Document Creation and now wish to Sign and Send, immediately. This is different to the process used for signing a saved document.

Instruction

1. You must be **logged in to Powerchart**. Two ways to identify who is logged in:
 - a. View full name (surname, first name) in top left of Powerchart page.
 - b. View username in bottom right of Powerchart page.

The screenshot shows the Powerchart software interface. At the top, a blue bar indicates the user is logged in as 'Bacon, Lisa'. Below this, a patient information header displays details for 'ZZZTRAINING, CODY', including MRN: 91871259, DOB: 07/06/69, and gender: Male. The main area shows a document creation screen for 'MDT Letter' with recipients 'Dr G Testing' and 'Cody Zzztraining'. The document content includes a letter addressed to 'Dr Testing' at 'Freeman Hospital, Freeman Road, High Heaton, Newcastle upon Tyne, NE7 7DN'. The letter is signed by 'Cody Zzztraining' (DOB: 07-Jun-1969, MRN: 91871259) and 'Campbell Tait, Consultant'. On the right, a 'Details' panel is visible, showing fields for Department (Urology), Lead Clinician (Mr. Daniel Pace), Signing Clinician (Campbell Tait), and Position (Consultant). A red circle 'a' is placed in the top left corner of the window, and another red circle 'b' is placed in the bottom right corner.

2. In the **Details** tab, found on the right side of screen:
 - a. **Department** and **Lead Clinician** autopopulate.
If incorrect, choose correct option in the drop-down list.
 - b. You must select **your name** in the **Signing Clinician** list.
If your name is not in the list, please ask your ward administrator to add you.
 - c. Select your **position** from the drop-down list.



You **MUST** be both logged in and selected as the signing clinician for authentication to take place. Authentication changes the green button from 'Sign and Finalise' to 'Sign and Send'. If this is not done correctly, you will not be able to send the letter.

e.g. Logged in as Lysa Bacon; the two examples below show the consequence of selecting a different signing clinician vs same as that logged in to system.

The image displays two side-by-side screenshots of a form interface. Both forms have the same fields: Department (Urology), Clinic (optional) (None), Lead Clinician (Mr. Daniel Pace), Position (Consultant), Clinic / Admit Date (26-Nov-2023), and Importance (Normal). The left form has the 'Signing Clinician' dropdown set to 'C', and the 'Save And Finalise' button is highlighted in red with a red 'X' next to it. The right form has the 'Signing Clinician' dropdown set to 'Lysa Bacon', and the 'Sign and Send' button is highlighted in red with a green checkmark next to it.

3. **Click** on the green **Sign and Send** button. The document will appear in the Doc Store Print App.

If it is a discharge summary, this will send by 01:00 the next day.

For all other letters, they will be available for your clinical administrator to send from the Doc Store Print App; you will need to let them know that a letter is ready to send.