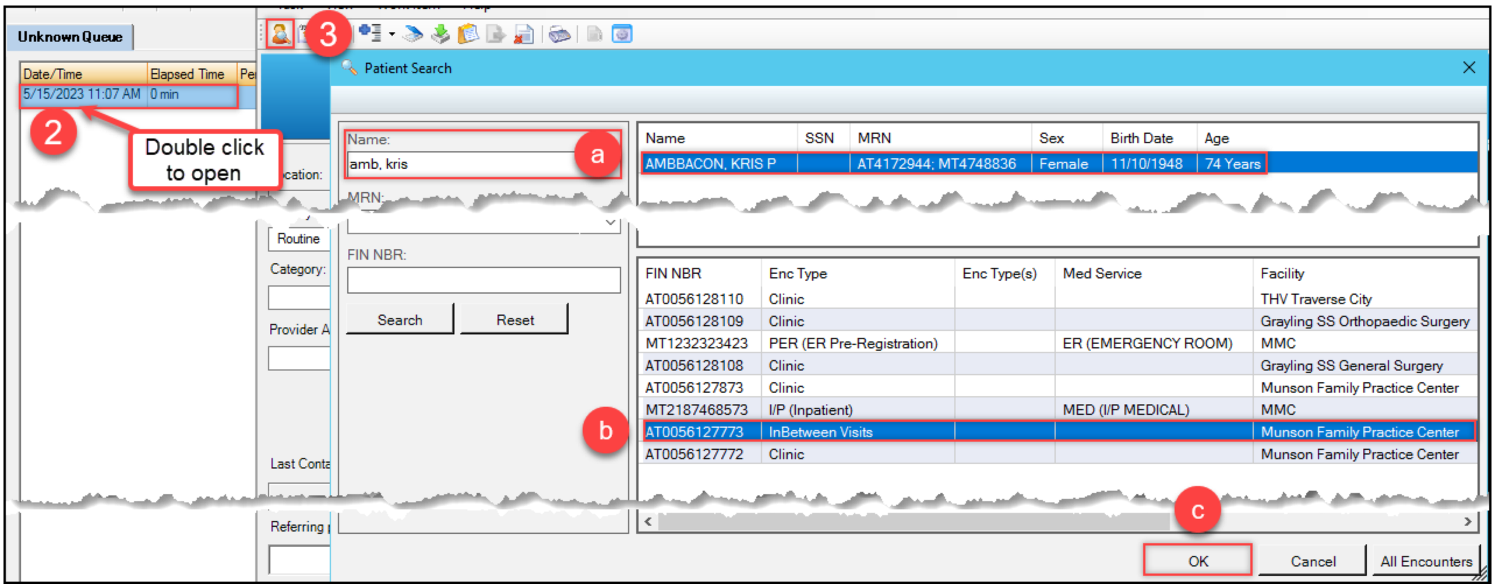
Electronic Signature Workflow for Providers, Clinical Staff, and Clerical Staff

Cerner PowerChart Ambulatory **EDUCATION**

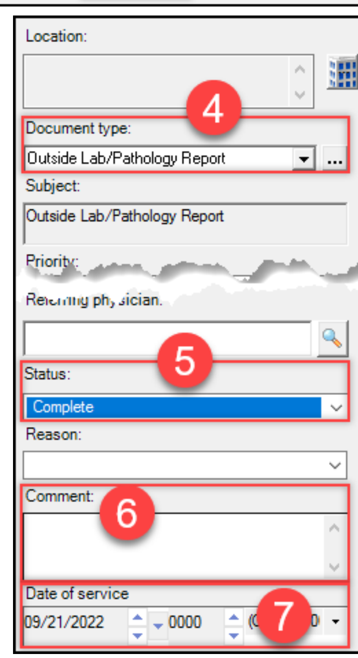
Step 1: Office Staff Workflow – Within Work Queue Monitor

1. Locate the document within the Work Queue Monitor (WQM) worklist.
2. Double click on the document to open.
3. Click the **Patient Search icon** to associate the patient.
   a. Search for and select appropriate patient.
   b. Select appropriate InBetween Visit encounter.
   c. Click **OK**.

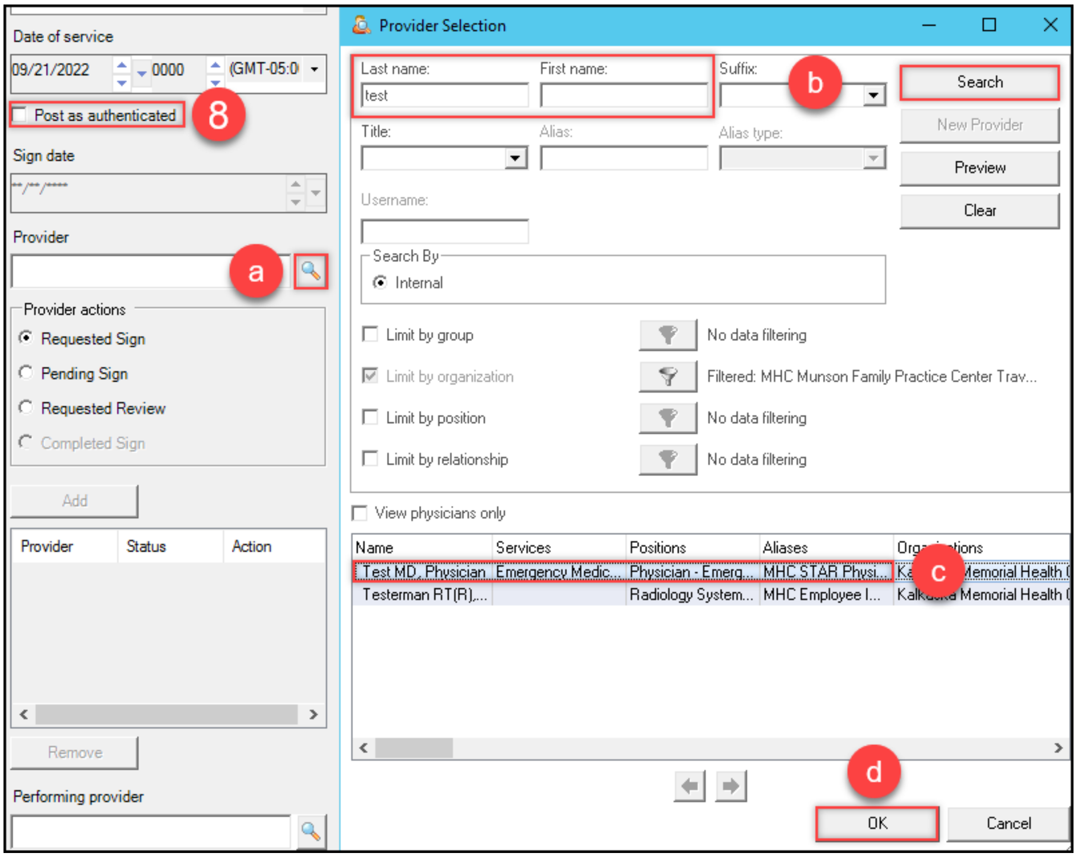
Note: The patient must have an existing InBetween Visit at the desired facility. If an InBetween Visit does not exist, one must be created within Revenue Cycle or PowerChart.



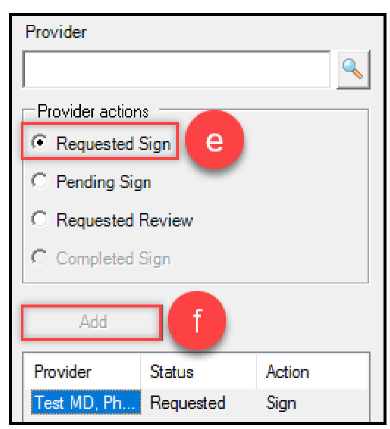
4. Select the **Document type**.
5. Set Status to **Complete**.
6. Enter comments into the Comment field as needed.
7. Date of service field will default to the encounter date. Change as needed.

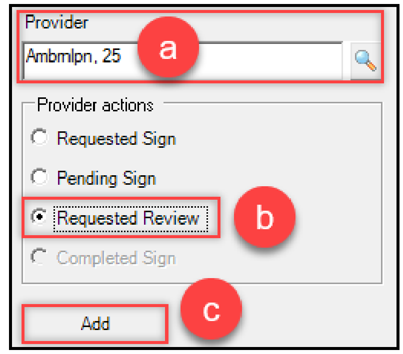


8. **UNCHECK** the Post as authenticated box.
    a. **Note:** Unchecking this box will not mark the document as authorized until it has been reviewed and signed.
9. Add the signing provider:
    a. In the Provider box, click the **magnifying glass** to search.
    b. Enter the provider's name and click **Search**.
    c. Select the appropriate provider.
    d. Click **OK**.

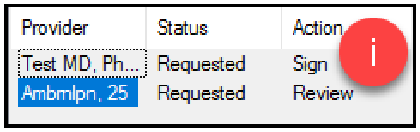


    e. Select the **Requested Sign** radio button.
    f. Click **Add**.
        i. The Provider, Status, and Action will display.

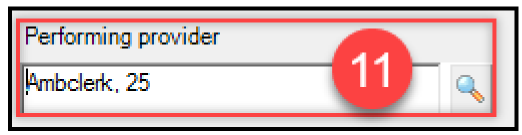




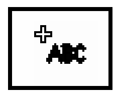
10. Add the provider's clinical staff member:
    a. Follow Step 9 a-d above to add the appropriate staff member.
    b. Select the **Requested Review** radio button.
    c. Click **Add**.
        i. The names of the provider and the clinical staff member will display in the Provider column, as well as their Status and Action.



11. Add the name of the staff member completing the work queue item:
    a. In the Performing provider box, click the **magnifying glass** to search.
    b. Select the appropriate staff member.



12. Within the document, +ABC will appear as the cursor.

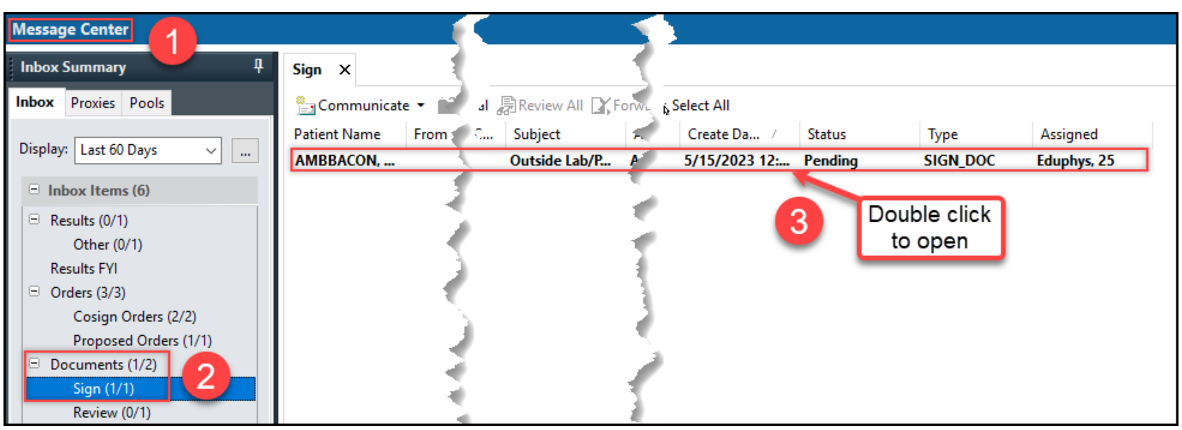


    a. **Note:** The provider must be selected in the status/action box for the +ABC to appear.
13. Scroll to where the signature needs to be placed within the document and click to add the signature box.
14. The **Requested Sign For: Provider Name** will appear where the signature will be placed.
    a. **Note:** The signature box can be moved by clicking and dragging to the appropriate location.

15. Click **OK**.

Step 2: Provider Workflow – Within PowerChart

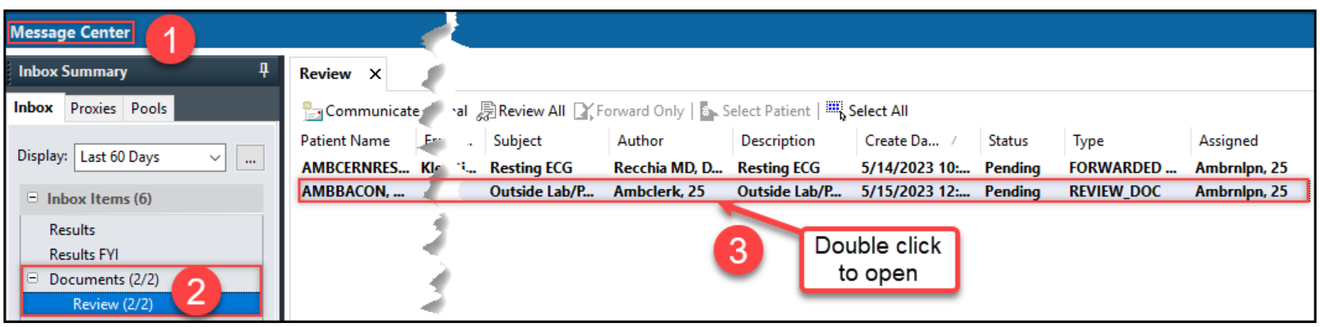
1. Navigate to Message Center.
2. Open the Documents folder, if necessary, then click on the Sign folder.
3. Double click on the item to open.



4. Complete the following in the Action Pane:
   a. Select the **Sign or Refuse** radio button.
      i. If Refuse is selected, please also select a Reason from the drop-down menu.
   b. Uncheck the Additional Forward Action button.
      i. **Note:** Providers may keep the Additional Forward Action button selected and choose a recipient to send the message to if desired.
5. Click **OK & Close** or **OK & Next** to complete.

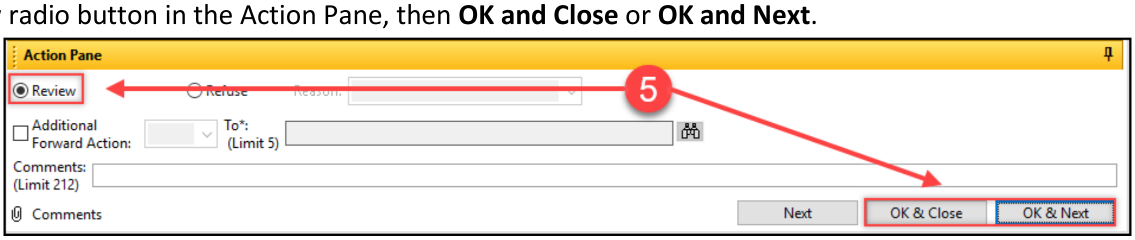
Step 3: Clinical Staff Workflow – Within PowerChart

1. Navigate to Message Center.
2. Open the Documents folder, if necessary, then click on the Review folder.
3. Double click on the item to open.



4. Verify that the electronic signature information is present on the document.

5. Select the **Review** radio button in the Action Pane, then **OK and Close** or **OK and Next**.



6. Fax the signed document to the requesting facility via Medical Record Request using the existing process.
   a. Template: **AMB CP Order Requisitions**.