

EPR Core and Clinical Documentation Foundation

Signature Manager – Signing Documents

Reference Guide



Signature Manager is a module within the Electronic Patient Record (**EPR**) that is used to sign orders, tasks, and documents, and verify (approve) orders across multiple patients and charts. It tracks what needs to be signed, who can sign it, when it was signed, and who signed it. You can sign or co-sign any item attributed to you and view the details of the items before signing or verifying.



Note: For EPR Core and Clinical Documentation Foundation Implementation, **Signature Manager** is used only for signing and co-signing documents.

Accessing Signature Manager

Signature Manager can be accessed through one of the following ways:


Method	Description
Log-On Pop-up	When logging into the EPR , if there are unsigned documents, order, or tasks, the Signature Manager dialogue appears before accessing EPR .
From Patient List	Double-click the flag in the To Sign column
From GoTo Menu	Click GoTo in Menu Bar → Enter/View → Signature Manager
From Main Toolbar	Click the Signature Manager icon  from the Main Toolbar
From Documents Tab	<ol style="list-style-type: none">1. Select the document requiring the signature2. Click Sign , or right-click and choose Sign Document

Preparing to Sign Documents

A. Filter the Signature Manager List in Sign Mode	<ol style="list-style-type: none">1. In Signature Manager, select Sign2. Under Patient Selection, select one of the following options:<ul style="list-style-type: none">• This Patient – This Chart: displays items requiring signatures for the currently selected patient and the currently selected chart.• This Patient – All Charts: displays items requiring signatures for the currently selected patient, regardless of the chart they belong to.• This List – This Chart: displays items requiring signatures for the patient visits on the current Patient List and the charts associated with those visits.
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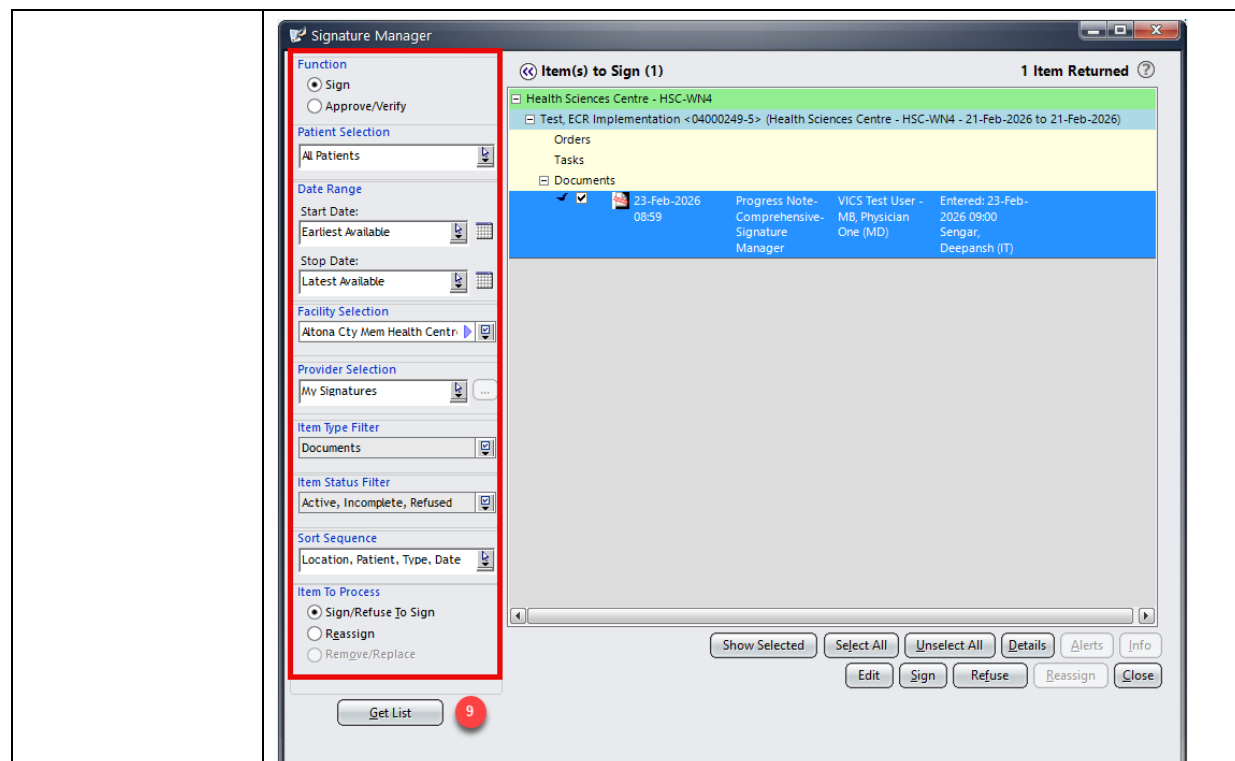
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	<ul style="list-style-type: none">• This List – All Charts: displays items requiring signatures for patient on the current Patient List, no matter which chart contains the items.• All Patient: Displays items requiring signatures for any patient, based on your security. <ol style="list-style-type: none">3. Use the calendar to select a date range from Start Date and Stop Date or select one of the time ranges from drop-down.4. From the Facility Selection, select the facility. By default, all facilities are checked.5. Under Provider Selection, select one of the following options:<ul style="list-style-type: none">• My Signatures: displays items only assigned to you that also meet the other selection criteria.• Selected Providers: displays items for other providers based on selection criteria. <div data-bbox="440 940 1421 1073" style="border: 1px solid green; background-color: #f0f0f0; padding: 5px;"><p> Note: The selected providers remain active in the filter criteria until you change the Provider selection option.</p></div> <ol style="list-style-type: none">6. Under Item Type filter, uncheck Orders & Tasks and select → Documents.7. Under Item Status filter, select one or more options:<ul style="list-style-type: none">• Active: documents awaiting signatures• Refused: documents where a signature has been refused• Incomplete: documents that are incomplete and still require signature8. Under Items to Process, select Sign/ Refuse to Sign9. Click Get List
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The **Signature Manager** window loads the list and displays **Item(s) to Sign**

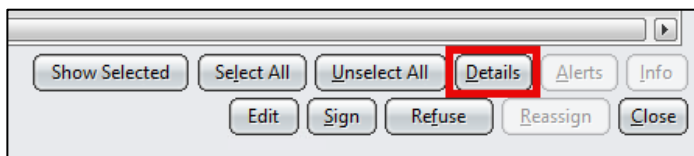
Signature Manager Icons

Icon	Description
	A black check mark indicates the item is assigned to you. To see a tooltip containing additional information, pause your cursor over the icon.
	A red check mark indicates you have processed the item.
	For a document, indicates the document is Incomplete .

B. View Details Before Signing


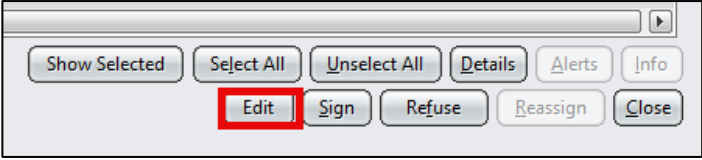

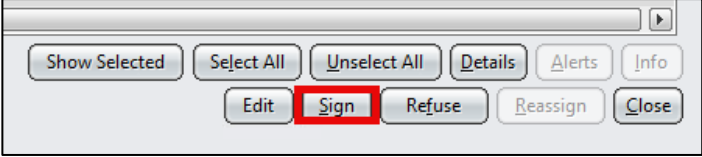
You can view the details of the document before signing it.

1. Click **Details**



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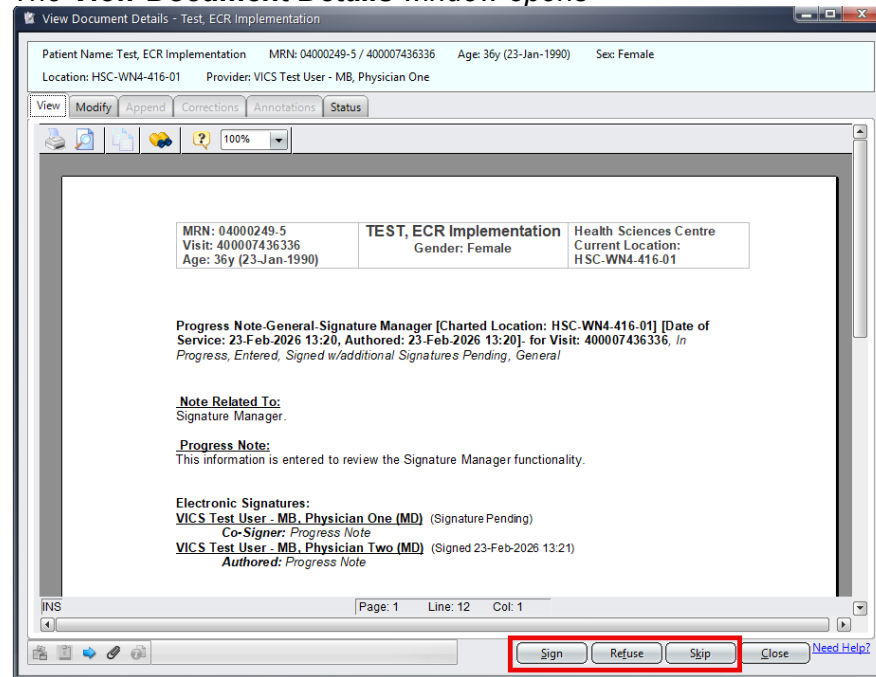
	<p>The View Document Details window opens the document in <i>Preview mode</i></p> <div data-bbox="451 449 1414 611" style="border: 1px solid green; padding: 5px;"><p> Note: Clicking Details allows you to view the document content only. It does not allow modifications, even if the document status is Incomplete.</p></div>
C. Editing a Document Before Signing	<p>You can edit a document before signing it</p> <ol style="list-style-type: none">1. Click Edit <div data-bbox="505 730 1203 888" style="border: 1px solid gray; padding: 5px;"></div> <p>The Document opens for editing in the Modify Document window</p> <ol style="list-style-type: none">2. Edit the document as required <div data-bbox="451 999 1414 1123" style="border: 1px solid green; padding: 5px;"><p> Note: Submitting the document after editing automatically signs the document.</p></div>
D. Signing Documents	<p>For signing documents from Signature Manager without editing:</p> <ol style="list-style-type: none">1. Select the document from the list loaded in Signature Manger2. Click Sign <div data-bbox="505 1297 1203 1455" style="border: 1px solid gray; padding: 5px;"></div>

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The View Document Details window opens



3. In the View Document Details window:

- To sign the document, click **Sign**, once signed:
 - The document is marked as Processed (red checkmark) in Signature Manager.
 - The document's signature status updates accordingly.
 - The Electronic Signatures section within the document reflects the completed signature, including date and time.

Note Related To:
Signature Manager.

Progress Note:
This information is entered to review Signature Manager functionality.
Note reviewed by MD Provider.

Electronic Signatures for Addendum Section:
[Redacted] (Signed Addendum 23-Feb-2026 13:43)
Test

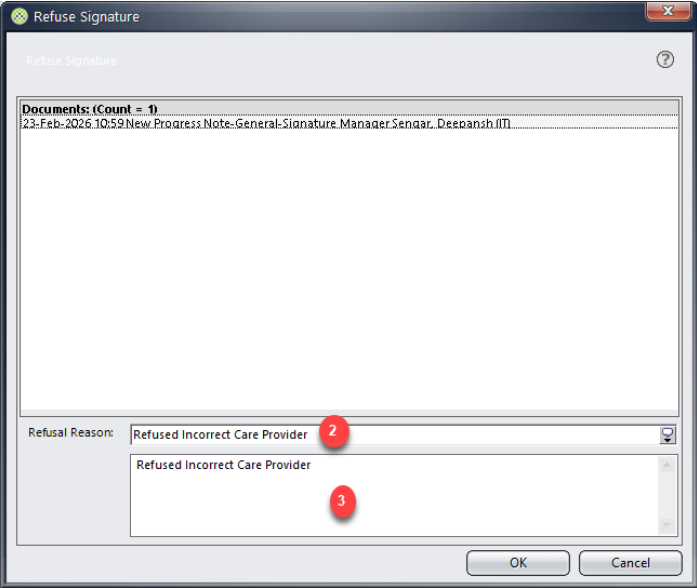

Electronic Signatures:
[Redacted] (Signed 23-Feb-2026 10:01)
Authored: Progress Note
VICS Test User - MB, Physician One (MD) (Signed 23-Feb-2026 10:07)
Authored: Progress Note
Co-Signer: Progress Note

Last Updated: 23-Feb-2026 13:43 by [Redacted]

- To refuse to sign the document, click **Refuse**

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	<ul style="list-style-type: none"> To move to the next selected document in the list without making any changes to this document, click Skip
<p>E. Refusing Signatures on Documents</p>	<p>If a document has been misattributed to you for signing, you can refuse to sign the document.</p> <ol style="list-style-type: none"> To refuse the document, click Refuse <i>The Refuse Signature window opens</i> Select Refusal Reason Enter any additional reason in the free text field  <ol style="list-style-type: none"> Click OK <div style="border: 1px solid green; padding: 5px; margin: 10px 0;"> <p> Note: After refusing, notify the document author to assign the correct co-signee.</p> </div> <ol style="list-style-type: none"> Once refused: <ul style="list-style-type: none"> The document is marked as Processed (red checkmark) in Signature Manager. The document’s signature status updates accordingly. The Electronic Signatures section within the document reflects the completed signatures and refusals, including date and time. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Electronic Signatures: <u>VICS Test User - MB, Physician One (MD)</u> (Signed 23-Feb-2026 12:26) <i>Authored: Progress Note</i> <u>VICS Test User - MB, Physician Two (MD)</u> (Refused to Sign 23-Feb-2026 12:33) <i>— Co-Signer: Progress Note</i></p> </div>

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Document Signature Status

When a document is created in **EPR**, a signature status is automatically assigned based on whether a co-signer is required.

The signature status is visible in the Documents tab:

Date of Service	DOS Time	Time	Document Name	Document Stat	Revisio	Signature Status
23-Feb-2026						
23-Feb-2026	13:20	13:20	Progress Note-General-Signature Manager	In Progress	Entered	Signed w/additional Signatures Pending
23-Feb-2026	12:25	12:25	Progress Note-General-Signature Manager	Final	Not Re...	Signed in Full
23-Feb-2026	10:58	10:58	Progress Note-General-Signature Manager	Final	Not Re...	Unsigned
23-Feb-2026	08:59	08:59	Progress Note-Comprehensive-Signature Manager	Final	Revised	Signed in Full

Signature Status	Description
Unsigned	This signature status displays when: <ul style="list-style-type: none"> No one has signed the document. The current “co-signer” or “on the behalf of author” refused to sign and is the last or only author for the document. The person who entered the document did not have the right to sign the documents.
Unsigned w/additional Signature(s) Pending	This signature status displays when: <ul style="list-style-type: none"> The current “co-signer” or “on the behalf of author” refused to sign and there are other authors who have not signed the document.
Signed w/additional Signature(s) Pending	This signature status displays when: <ul style="list-style-type: none"> The document was finalized but still has one or more outstanding signatures.
Signed in Full	This signature status displays when: <ul style="list-style-type: none"> A document has all required signatures. A document requires multiple signatures, and at least one author signed, but another author refused to sign or reassigned the document with “no signatures required.”