



Newsletter Tip – Electronic Signatures

Welcome to American Data CARES, the online resource for all your ECS needs. This handout may be read independently or in conjunction with the corresponding video *Newsletter Tip – Electronic Signatures* in our American Data CARES library. This handout gives you tips on creating and using electronic signature fields on reports. If after reviewing this material, you need further assistance, please contact cares@american-data.com or 800-464-9942.

Thank you for taking the time to learn more about electronic signatures. Please check out our other videos and documentation for more great information about ECS!

Why You Should Use This Feature

Electronic signature fields let residents and resident representatives sign forms electronically, allowing you to capture the signature and store the form into ECS all in one step.

The Details - Setup

The good news is the setup for this functionality is super easy! The ECS System Administrator who has rights to word setup is the perfect person for the task of implementing this functionality.

1. Select American Data – ECS, then Setup > Reports > Report Maker
2. Use the **Open Report** icon to select the report you would like to add a signature field to.
3. Select **Add Field** and choose Signature/**OK**. The Signature field properties will be displayed.
4. Select the [...] picklist box next to the Identifier to select the Signature Identifier of your choice (e.g. Resident or Representative).
5. Click **Close**.
6. Drag the new field to the desired location on the report and size it as needed.
7. Select **Save** to save the change to the report.

Once a report has been signed, it can be stored right into ECS. The following steps outline the setup for this function.

1. Decide where the report will be stored: Select or create a topic/word in ECS for this purpose.
 - a. You will need a QUESTION word,(e.g. “ADMISSION AGREEMENT”) set to Question/List/Entry Break, as well as a
 - b. Picture word, which is simply a word called “browse for document” that has the “picture” check box selected.

2. In the report setup, select the **Options** tab. In the *Attach* field, select the [...] picklist box and navigate to the QUESTION word. Select it and click **OK**. It will be displayed in the Attach field.
3. Click **OK** to close the Options box and then select **Save** to save your changes.

The Details – Signing the Document

1. Preview the report.
2. Click on the **Signature** prompt at the top of the preview to display the signature box field. Obtain the signature.
3. Click on **Attach**. A popup will display showing where the document has been saved.

Examples of Applications of This Feature

- Admission Agreements
- Permissions
- Care Plans
- Receipts
- Consent forms
- Bed Hold form