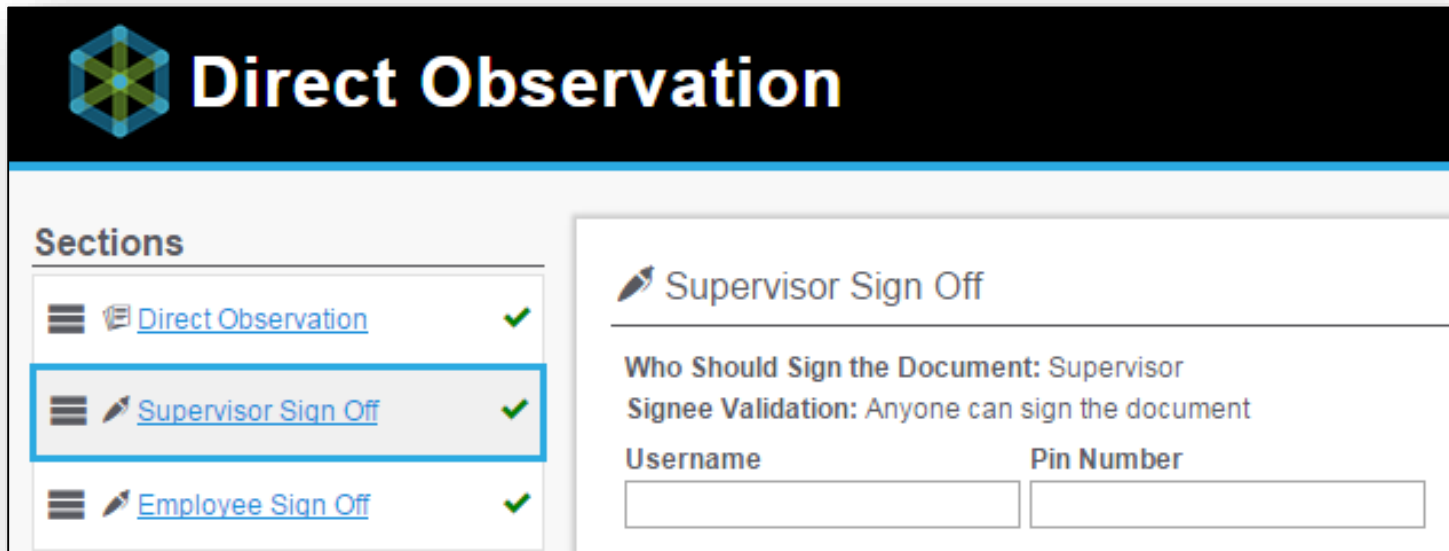


Setup View – Competency Documents Perspective

Add Electronic Signature to Documents

This reference guide provides an overview of the process for Adding Electronic Signature to Documents within StaffReady. The following process steps and instructional information are provided within this document:

- Add Supervisor Signature to Documents
- Add Employee Electronic Signature



The screenshot displays the 'Direct Observation' setup interface. On the left, a 'Sections' sidebar lists three items: 'Direct Observation', 'Supervisor Sign Off', and 'Employee Sign Off', each with a green checkmark. The 'Supervisor Sign Off' section is highlighted with a blue border. The main content area shows the configuration for 'Supervisor Sign Off', including the text 'Who Should Sign the Document: Supervisor' and 'Signee Validation: Anyone can sign the document'. Below this, there are two input fields labeled 'Username' and 'Pin Number'.

Direct Observation

Sections

- Direct Observation ✓
- Supervisor Sign Off ✓**
- Employee Sign Off ✓

Supervisor Sign Off

Who Should Sign the Document: Supervisor
Signee Validation: Anyone can sign the document

Username Pin Number

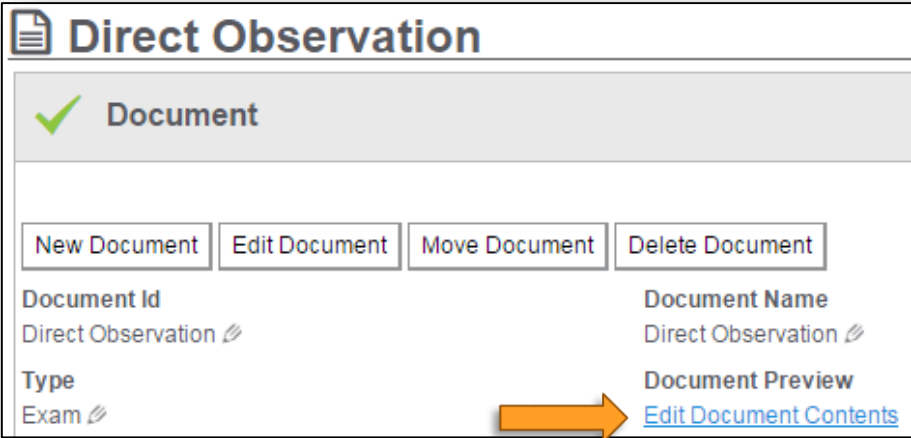
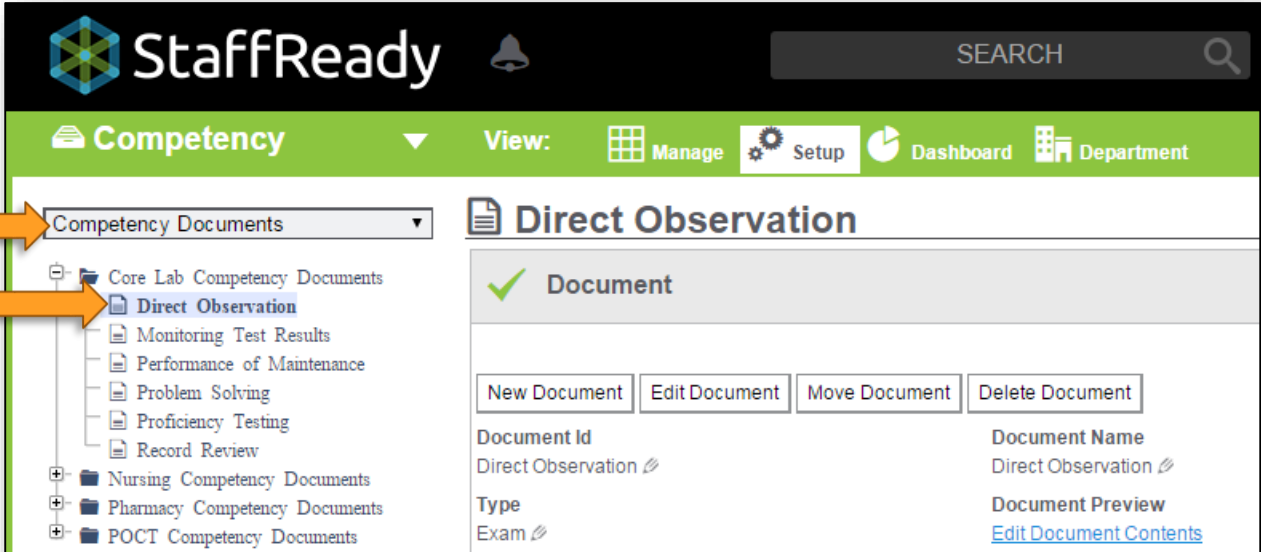
1 | Add Supervisor Electronic Signature

Add Supervisor Electronic Signature

1. Select **Competency Documents** perspective.

2. Select **Competency Document**.

3. Click [Edit Document Contents](#).



4. Click **Add a Section**.

The screenshot displays the 'Direct Observation' interface. At the top, there is a header with a logo and the title 'Direct Observation'. Below the header, the interface is divided into several sections:

- Sections:** A list containing 'Direct Observation' with a green checkmark, and a button labeled 'Add a Section' which is highlighted by an orange arrow.
- Document Details:** A panel with a minus sign icon, containing:
 - Description:** 'This is the primary checklist document for the direct observation of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing.'
 - Document Type:** 'Exam'
 - Points to Pass:** '10 of 10 (100%)'
 - Buttons: 'Edit', 'Clone', 'New'
- Direct Observation Content:** A main area with a list of questions:
 - Question 1:** 'Before testing, ensures specimen is properly identified with appropriate labeling.' It has a '1 Point(s)' value, 'no additional details', a 'Passing Score' dropdown set to 'Yes', a 'Comments' text box, and 'no attachments'.
 - Question 2:** 'Before testing, verifies specimen was collected in correct tube or container.' It also has a '1 Point(s)' value.

5. Select **Sign Off...** for **Section Type**.
6. Enter **Section Id**.
7. Enter **Who Should Sign the Document**.
8. Select **Anyone can sign the document** for **Signee Validation**.
9. Click **Save Changes**.

Note: It is strongly recommend that the option **Anyone can sign the document** is used for **Supervisor Sign Off**. The option **The Supervisor signs the document** should only be used if the **Department Supervisor** will be completing the assessment and electronic signature. This is not likely within environments were multiple supervisors can complete an assesment. The **Department Supervisor** is set within the **Department** settings, and there can only be one **Department Supervisor**.

New Section

Section Type* ⓘ
Sign Off: A section to record document sign off ▼

Section Id* ⓘ
Supervisor Sign Off

Who Should Sign the Document* ⓘ
Supervisor

Signee Validation* ⓘ
Anyone can sign the document ▼

Save Changes

New Section

Section Type* ⓘ
Sign Off: A section to record document sign off ▼

Section Id* ⓘ
Supervisor Sign Off

Who Should Sign the Document* ⓘ
Supervisor

Signee Validation* ⓘ
Anyone can sign the document ▼
Choose One
Anyone can sign the document
The subject of the document signs the document
The supervisor signs the document

2 | Add Employee Electronic Signature

Add Employee Electronic Signature

1. Select **Competency Documents** perspective.

2. Select **Competency Document**.

The screenshot shows the StaffReady web application interface. At the top, there is a search bar and navigation icons for Manage, Setup, Dashboard, and Department. Below this is a green header with the 'Competency' menu item. A dropdown menu is open, showing a list of competency document categories: Core Lab Competency Documents, Direct Observation, Monitoring Test Results, Performance of Maintenance, Problem Solving, Proficiency Testing, Record Review, Nursing Competency Documents, Pharmacy Competency Documents, and POCT Competency Documents. Two orange arrows point to the 'Competency Documents' dropdown and the 'Direct Observation' item. On the right side, the 'Direct Observation' document details are shown, including a 'Document' header with a green checkmark, buttons for 'New Document', 'Edit Document', 'Move Document', and 'Delete Document', and fields for 'Document Id' (Direct Observation), 'Document Name' (Direct Observation), and 'Type' (Exam). A link for 'Edit Document Contents' is also visible.

3. Click [Edit Document Contents](#).

Direct Observation

✓ Document

New Document Edit Document Move Document Delete Document

Document Id	Document Name	Document Preview
Direct Observation ✎	Direct Observation ✎	Edit Document Contents
Type		
Exam ✎		

4. Click **Add a Section**.

Direct Observation

Sections

- Direct Observation ✓
- Supervisor Sign Off ✓
- + Add a Section

Document Details

Description
This is the primary checklist document for the direct observation of routine patient test performance, including patient preparation, if applicable, specimen handling, processing and testing.

Document Type
Exam

Points to Pass
10 of 10 (100%)

Edit Clone New

Direct Observation

Question 1

- Before testing, ensures specimen is properly identified with appropriate label
- no additional details
- Passing Score: Yes
- Comments:
- no attachments

Question 2

- Before testing, verifies specimen was collected in correct tube or container
- no additional details

5. Select **Sign Off...** for **Section Type**.

6. Enter **Section Id**.

7. Enter **Who Should Sign the Document**.

8. Select **The subject of the document signs the document** for **Signee Validation**.

9. Click **Save Changes**.

The screenshot shows a 'New Section' form with the following fields and values:

- Section Type***: Sign Off: A section to record document sign off
- Section Id***: Employee Sign Off
- Who Should Sign the Document***: Employee
- Signee Validation***: The subject of the document signs the document
- Save Changes**: A button at the bottom of the form.

Orange arrows from the instructions on the left point to each of these fields.