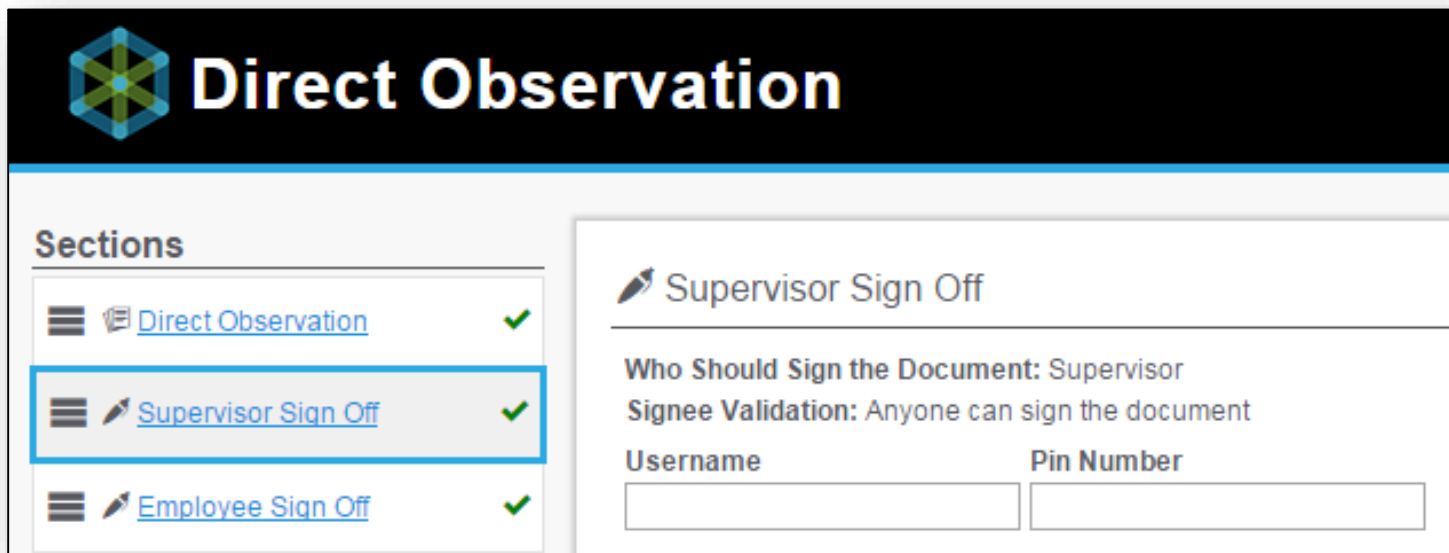


## Setup View – Browse Requirements Perspective

### 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 Electronic Signature
- 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'.

# 1 | Add Supervisor Electronic Signature

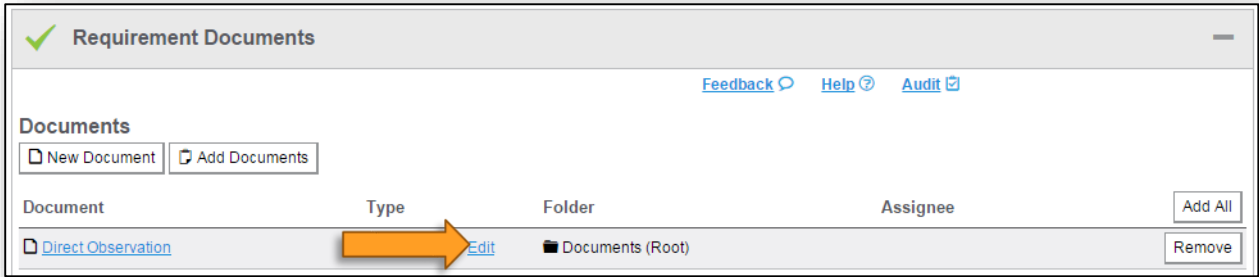
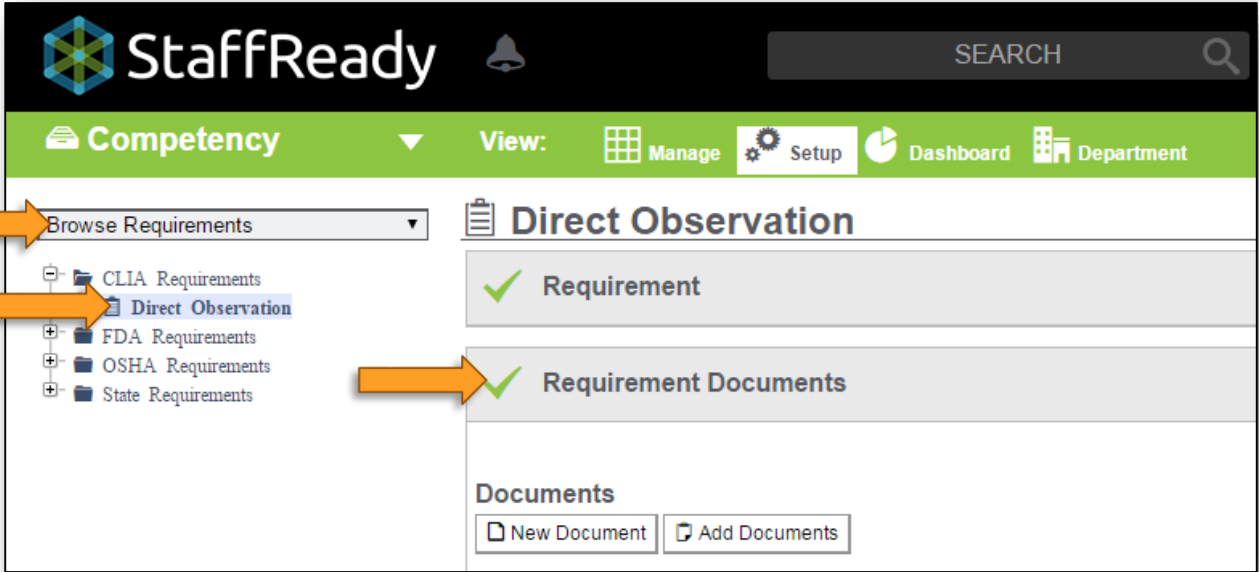
## Add Supervisor Electronic Signature

1. Select **Browse Requirements** perspective.

2. Select **Requirement**.


3. Click to open **Requirement Documents** colorbar.


4. Click [Edit](#).



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

### Edit Document

Document Id\* ⓘ  Within ⓘ  Core Lab Competency Documents [change](#)

Document Name ⓘ  Document Preview ⓘ [Edit Document Contents](#) 

Points to Pass\* ⓘ  10 of 10 (100%)

Retake Options ⓘ  An exam retake can be initiated by an employee

Document 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.

6. Click **Add a Section**.

The screenshot displays the 'Direct Observation' interface. On the left, a sidebar contains a 'Sections' list with 'Direct Observation' and a green checkmark, and a dashed 'Add a Section' button highlighted by an orange arrow. Below this is a 'Document Details' panel with a minus sign icon, containing a description, document type 'Exam', and points to pass '10 of 10 (100%)'. At the bottom of the sidebar are 'Edit', 'Clone', and 'New' buttons. The main content area shows 'Direct Observation' with two questions. 'Question 1' is worth 1 point and has a description, no additional details, a passing score of 'Yes', a comments field, and no attachments. 'Question 2' is also worth 1 point and has a description.

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

8. Enter **Section Id**.

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

10. Select **Anyone can sign the document** for **Signee Validation**.

11. 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

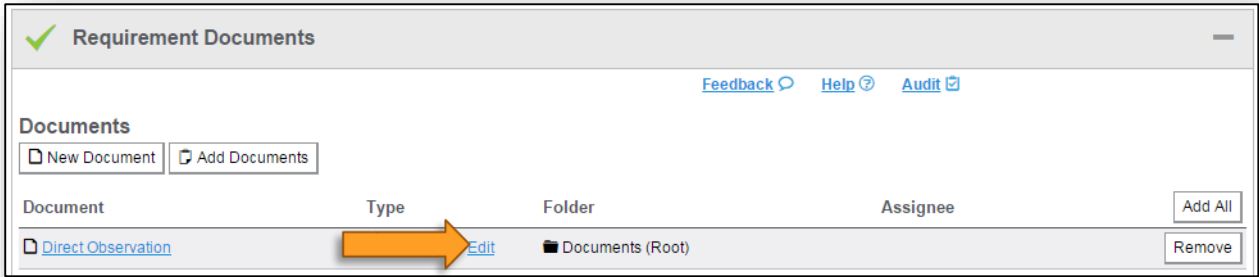
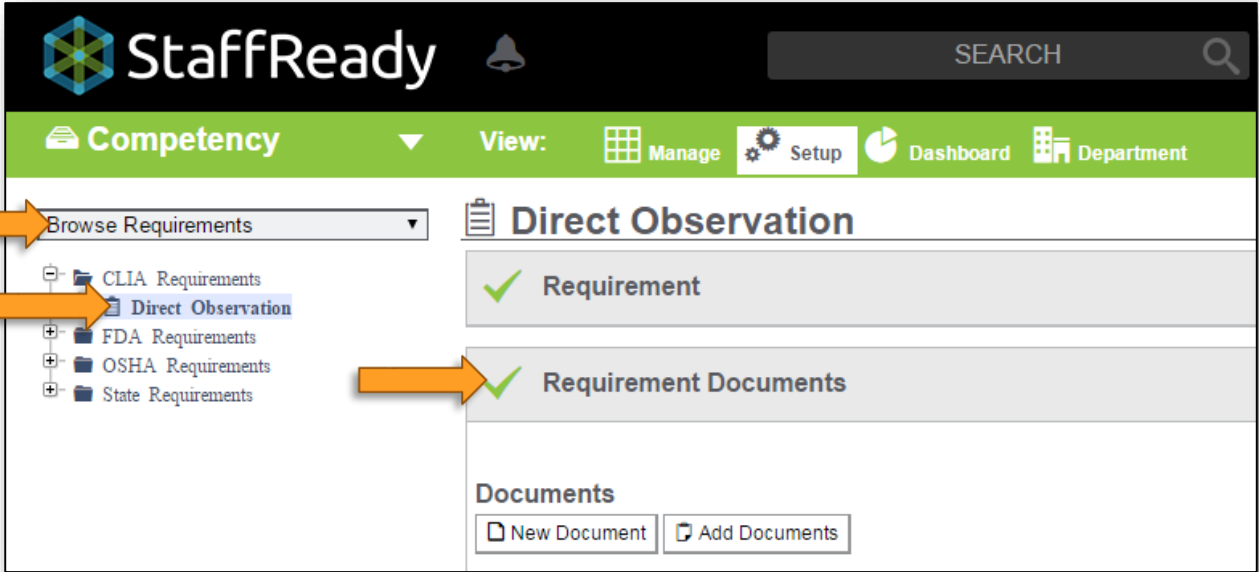
### Add Employee Electronic Signature

1. Select **Browse Requirements** perspective.

2. Select **Requirement**.


3. Click to open **Requirement Documents** colorbar.


4. Click [Edit](#).



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

### Edit Document

Document Id\* ⓘ  Within ⓘ  Core Lab Competency Documents [change](#)

Document Name ⓘ  Document Preview ⓘ [Edit Document Contents](#) 

Points to Pass\* ⓘ  10 of 10 (100%)

Retake Options ⓘ  An exam retake can be initiated by an employee

Document 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.

6. Click **Add a Section**.

The screenshot displays the 'Direct Observation' interface. On the left, a sidebar contains a 'Sections' list with 'Direct Observation' and 'Supervisor Sign Off' (both with green checkmarks) and a dashed 'Add a Section' button highlighted by an orange arrow. Below this is the 'Document Details' section, which includes a description, document type (Exam), and points to pass (10 of 10, 100%), along with 'Edit', 'Clone', and 'New' buttons. The main content area shows a list of questions, with 'Question 1' expanded to show a description, a 'Passing Score' dropdown set to 'Yes', and a 'Comments' text field. 'Question 2' is partially visible below.

- 7. Select **Sign Off...** for **Section Type**.
- 8. Enter **Section Id**.
- 9. Enter **Who Should Sign the Document**.
- 10. Select **The subject of the document signs the document** for **Signee Validation**.
- 11. 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: the first arrow points to the Section Type dropdown, the second to the Section Id text box, the third to the Who Should Sign text box, the fourth to the Signee Validation dropdown, and the fifth to the Save Changes button.