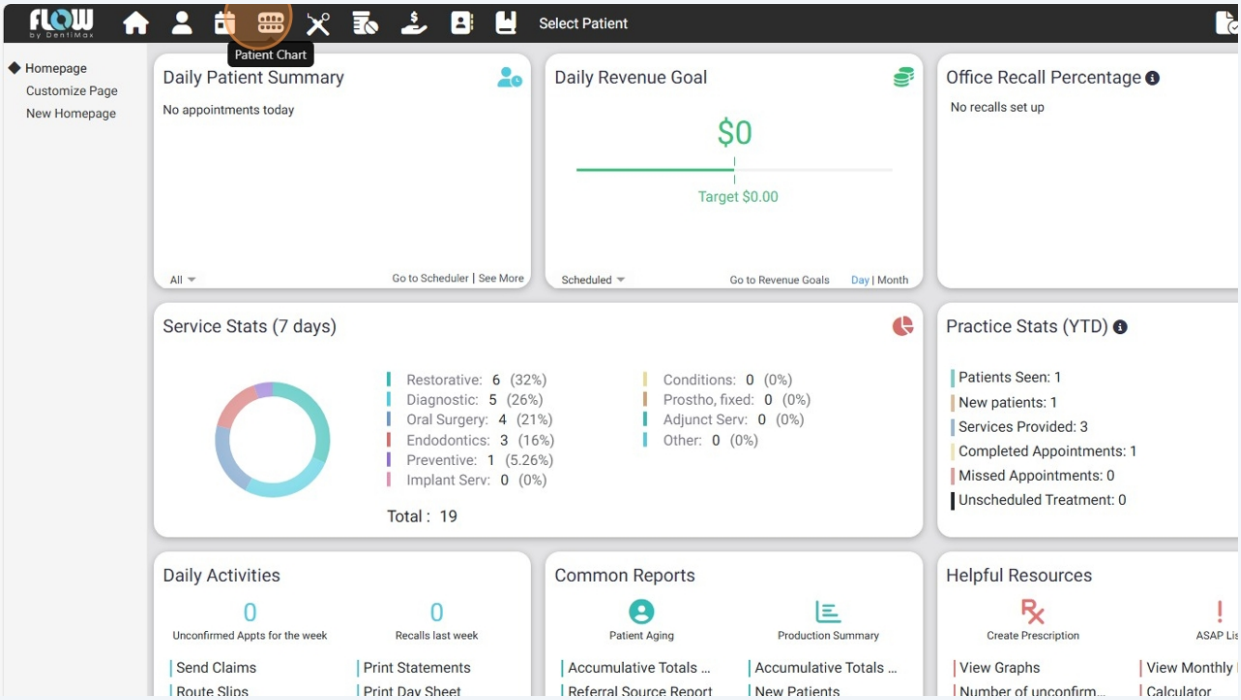
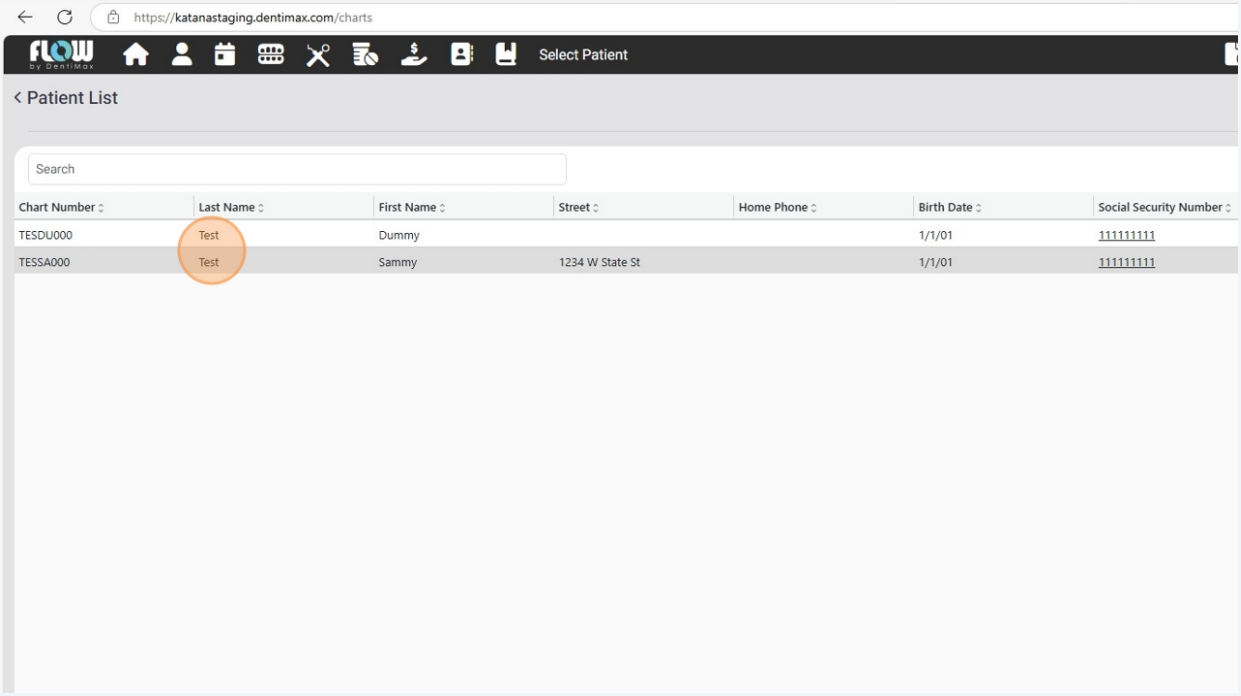
Sign and Print Treatment Plan (Copy)

1 Open Patient Charting

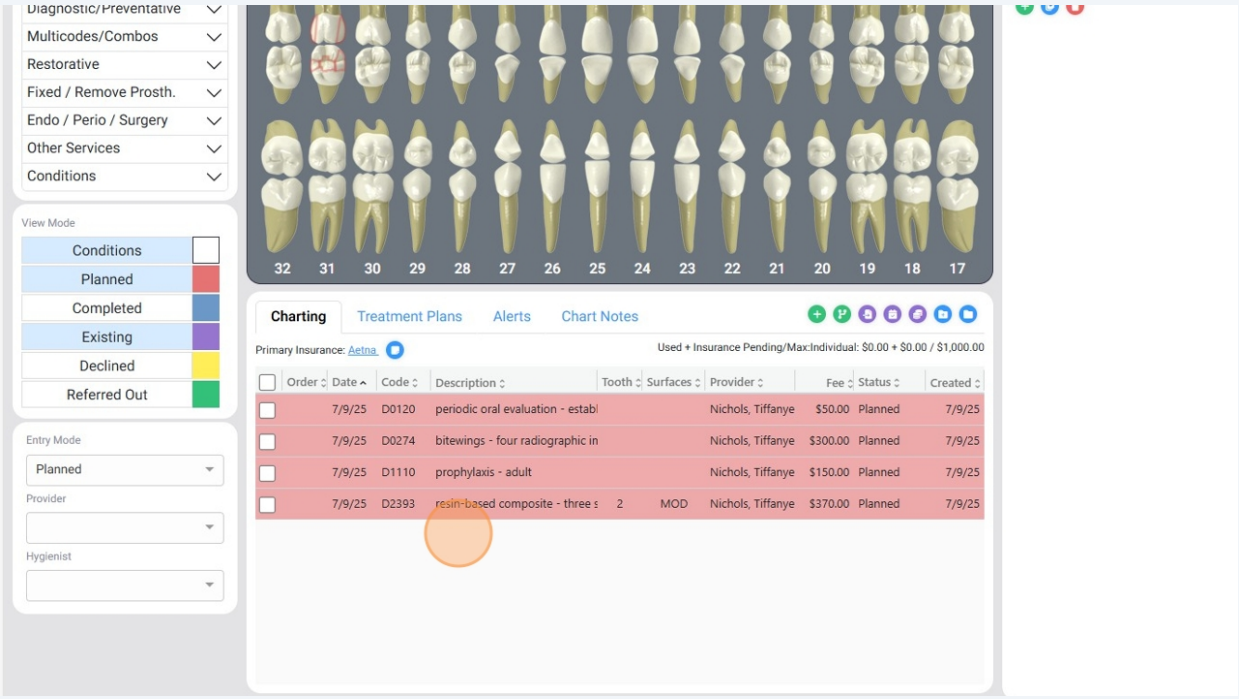
If you are already in patient charting, skip to step 3



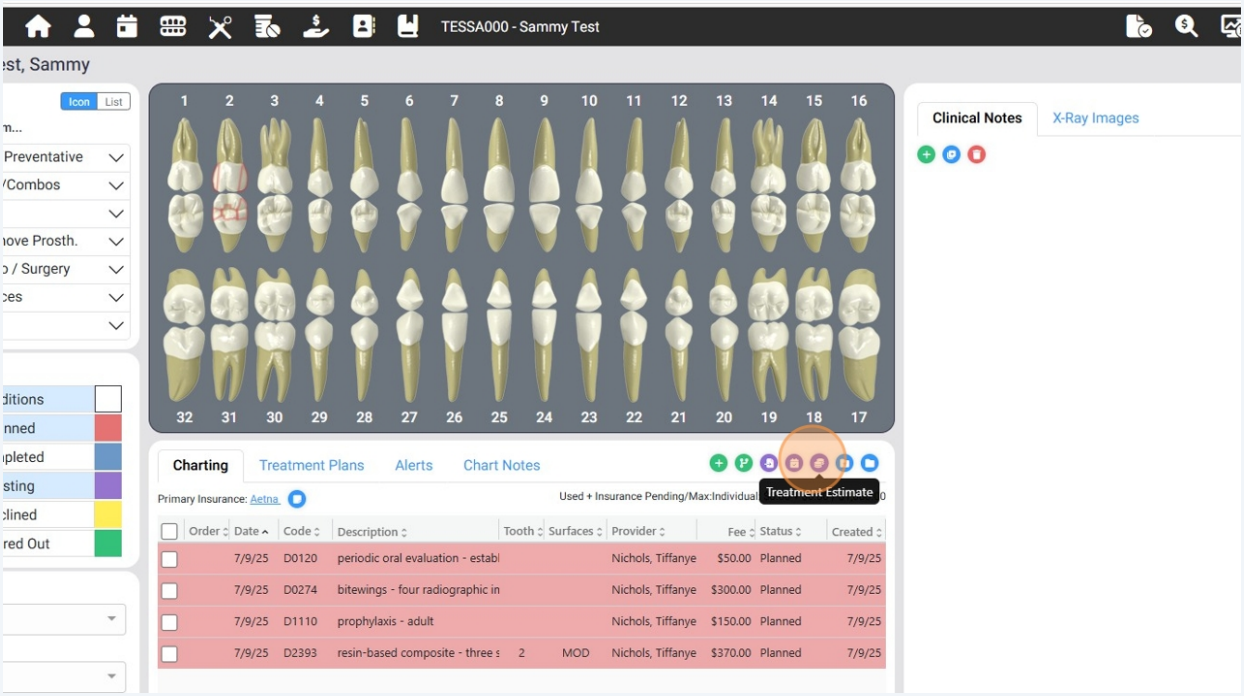
2 Select your patient



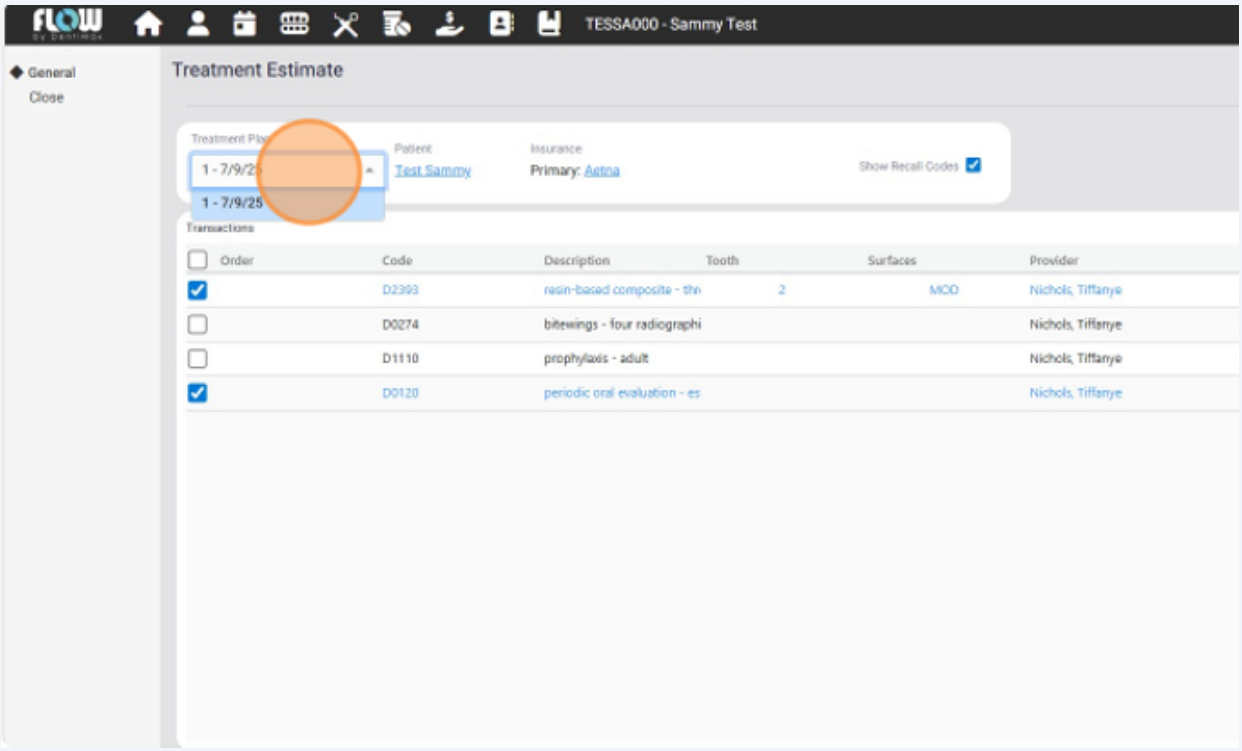
3 You will see all your treatment items listed in the charting for the selected treatment plan



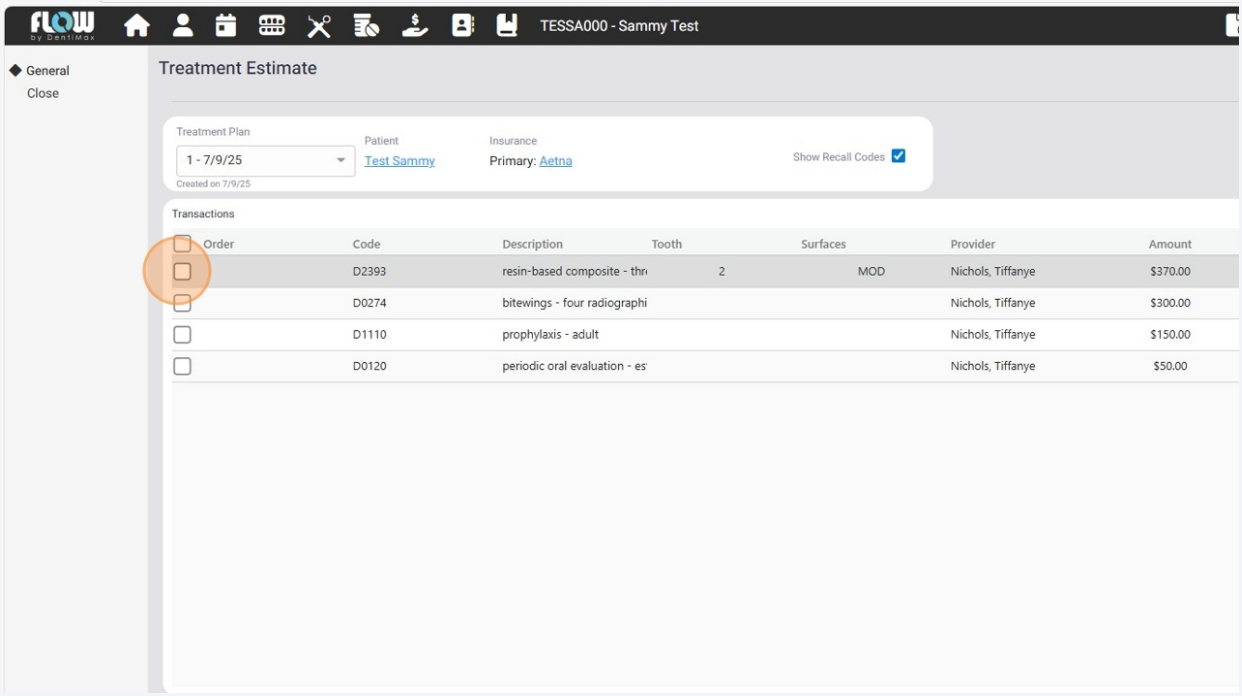
4 Click Treatment Estimate



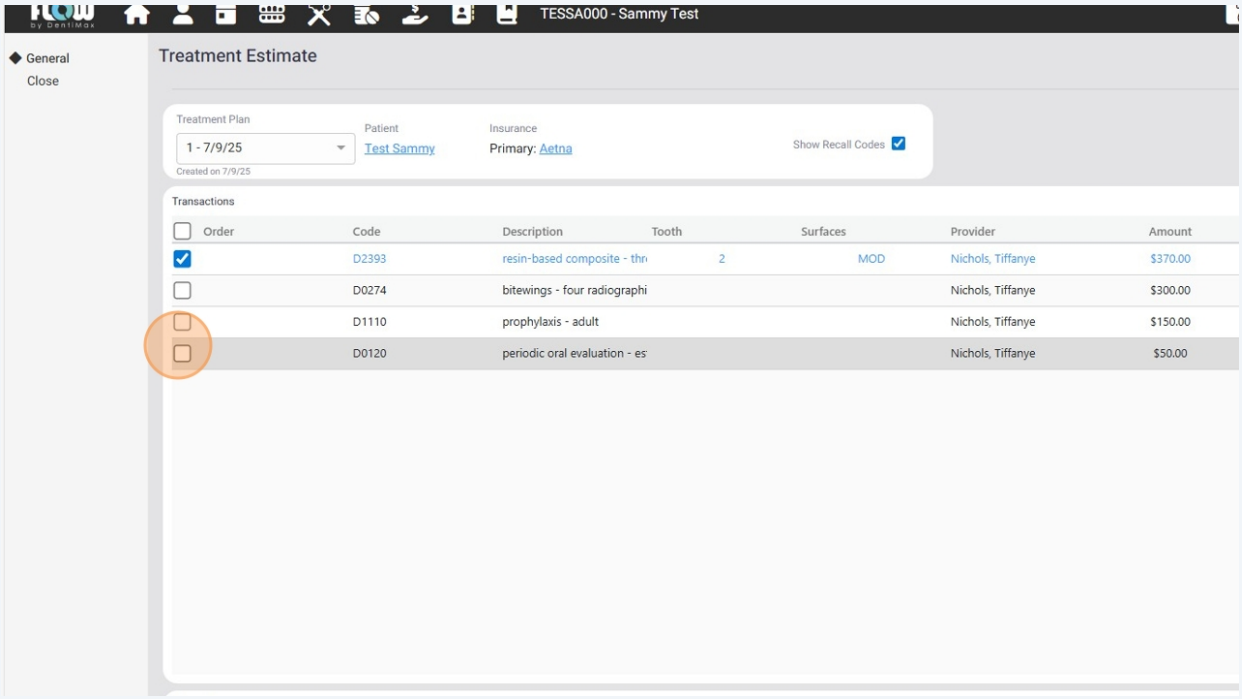
5 If the patient has multiple treatment plans; select the treatment plan



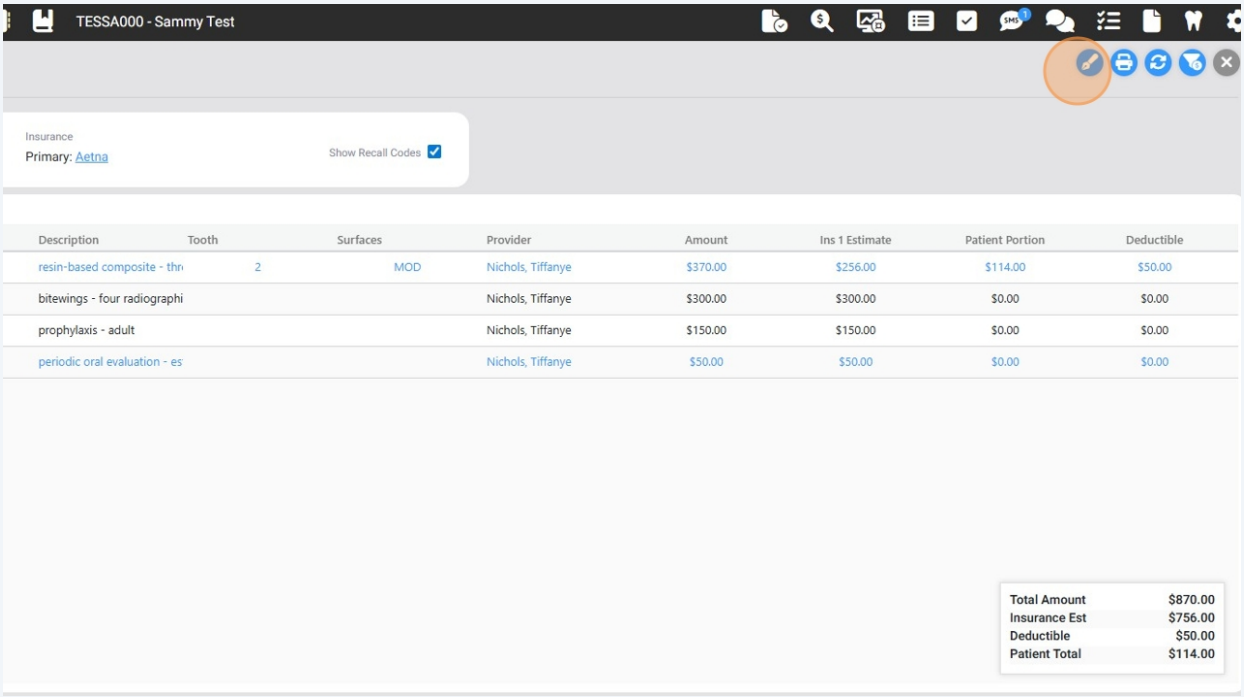
6 You have the option to print the estimate for all procedures listed or you can select specific procedures



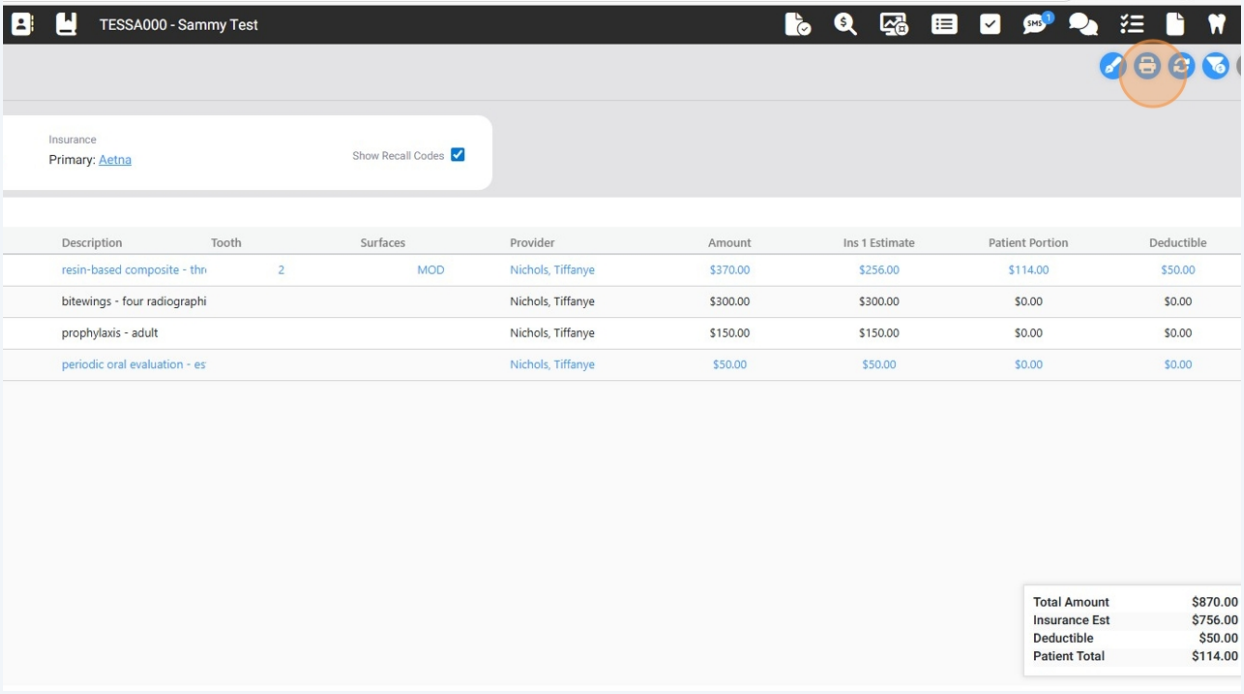
7 Click here to select



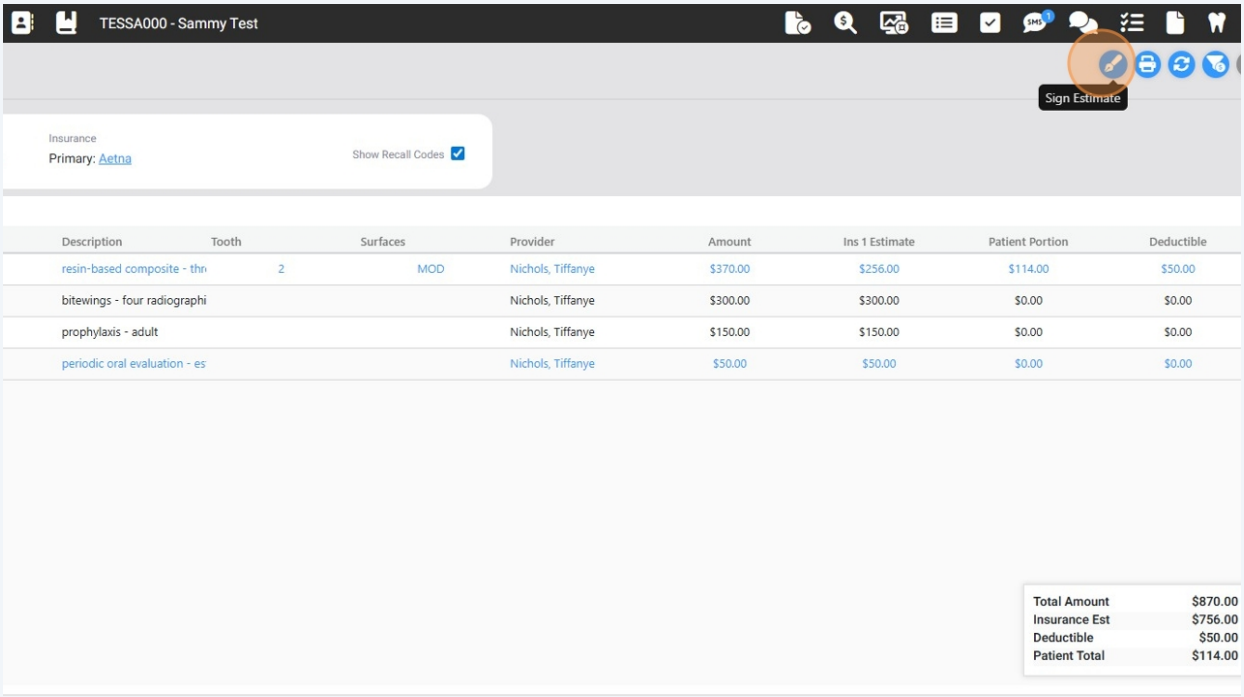
8 You have the option to directly sign or print the treatment estimate



9 Click "Treatment Estimate"

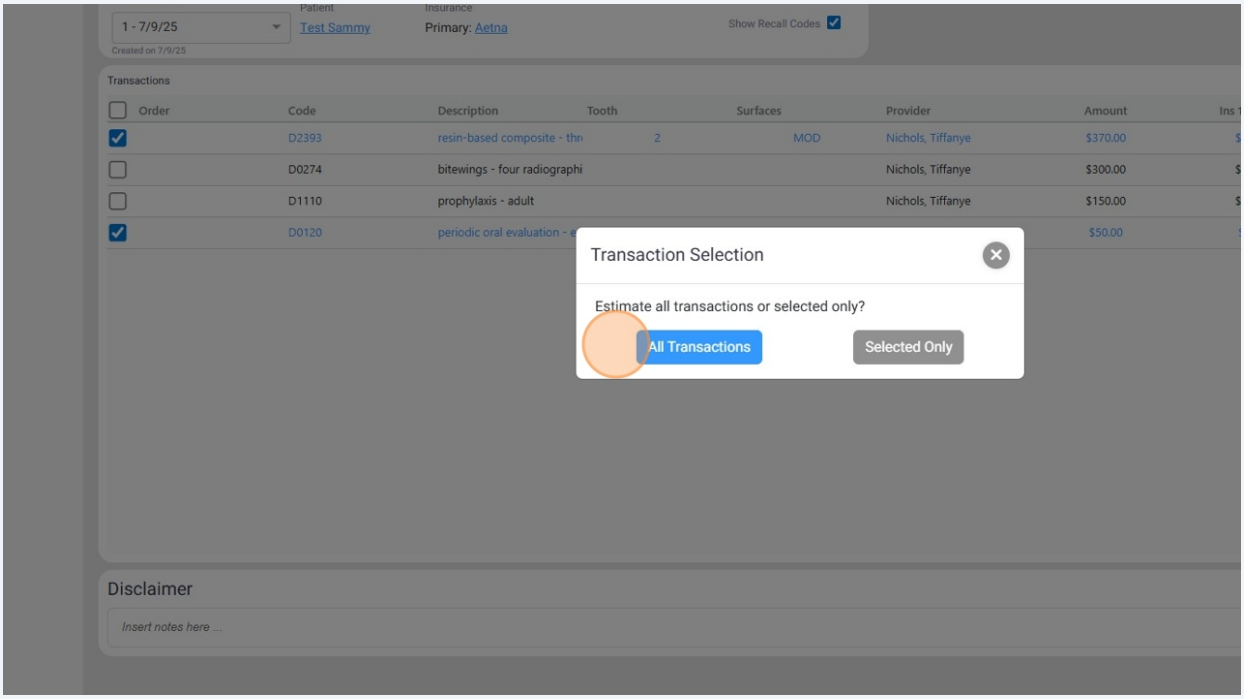


10 Click Sign Estimate

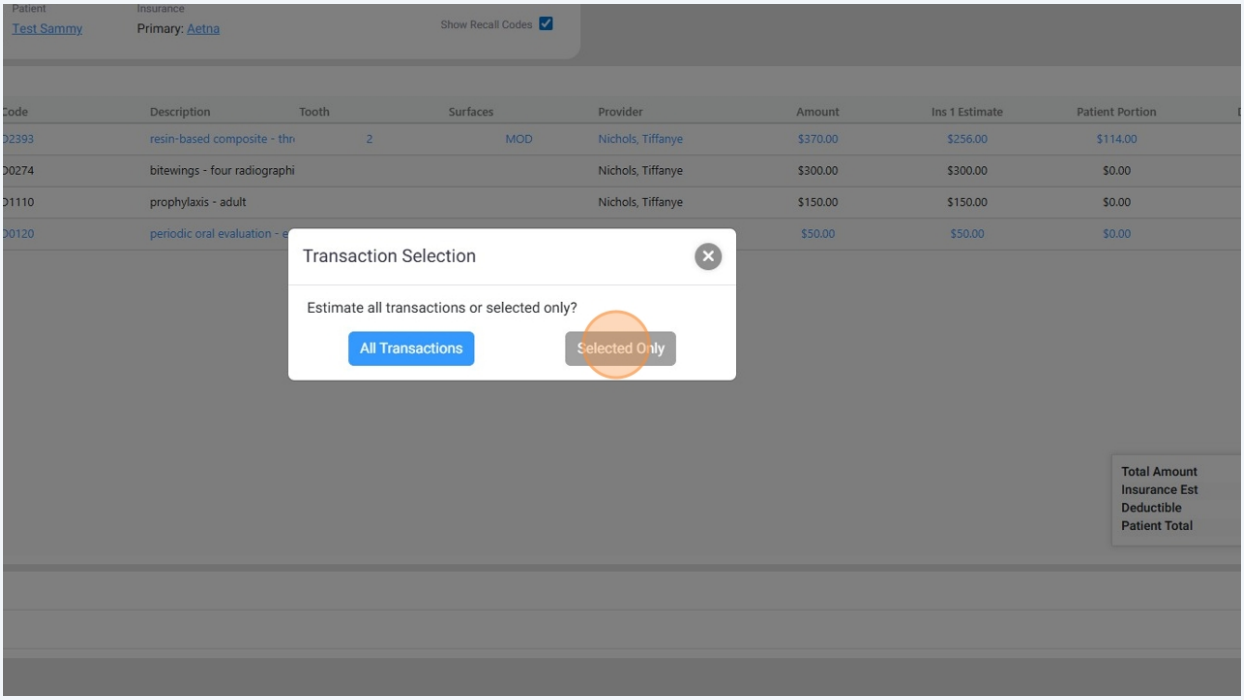


11 If you have selected individual transactions you will see this option pop up.

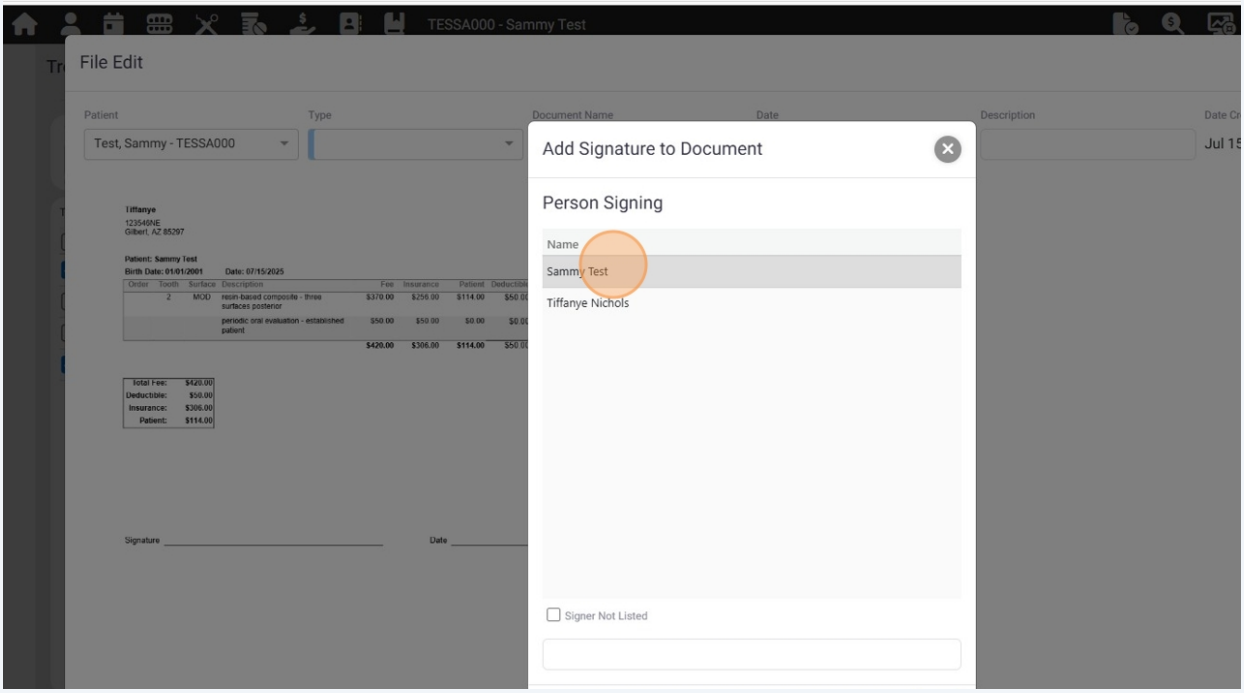
If you did not previously select individual treatments this option will not pop up.



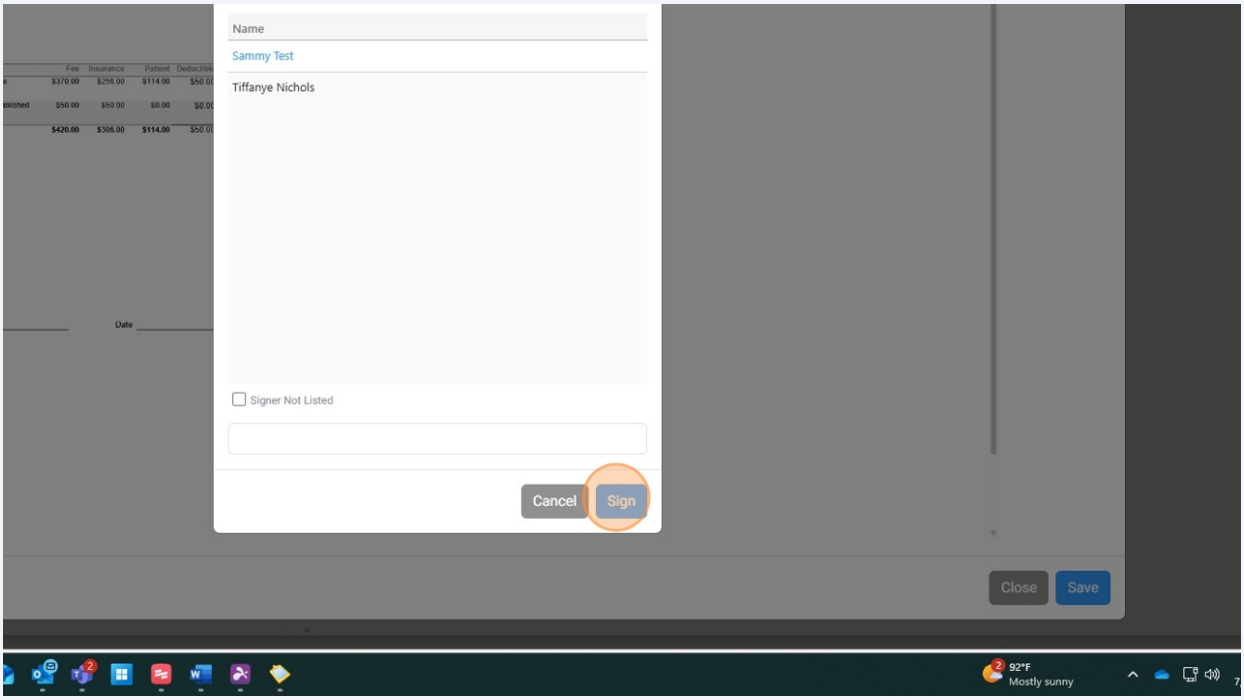
12 Click here



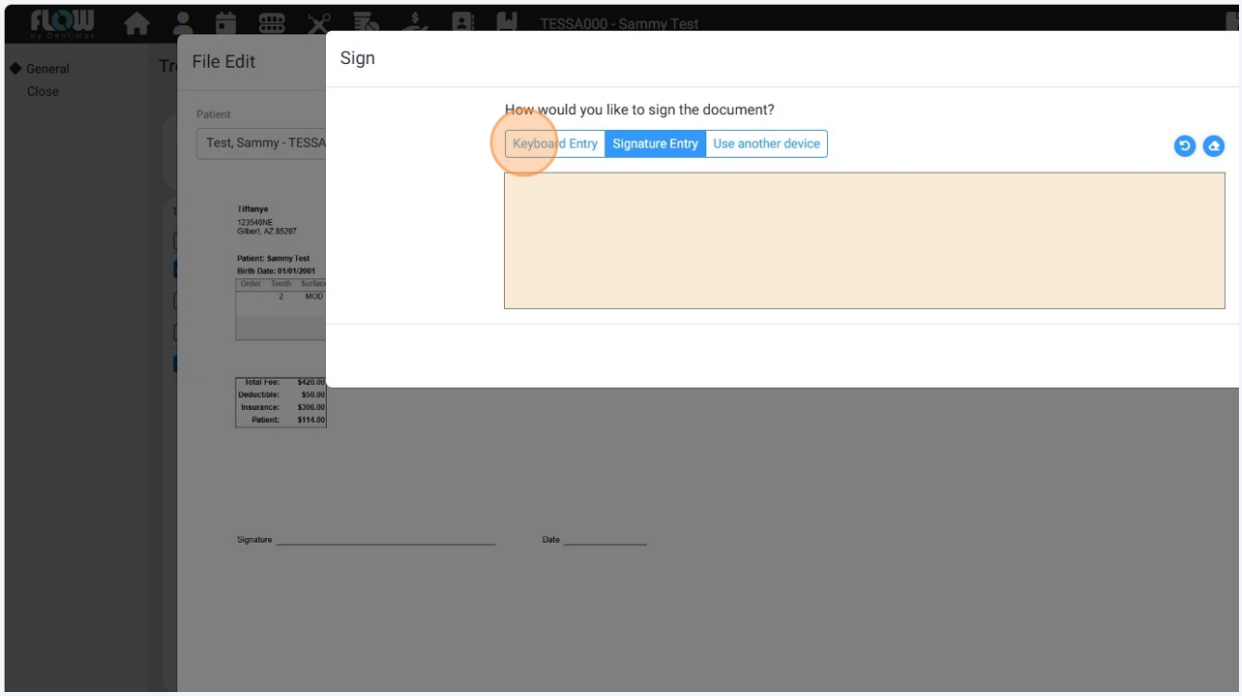
13 Select the person who is signing



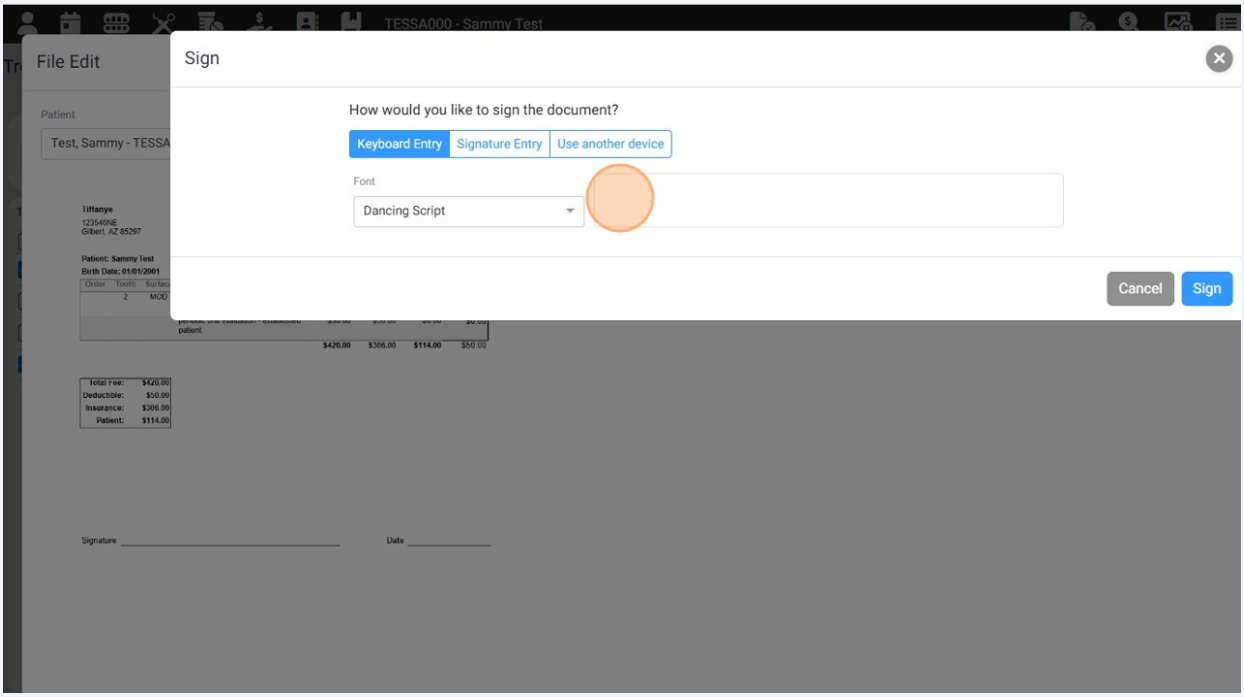
14 Click "Sign"



15 You have 3 options to receive patient's signature:

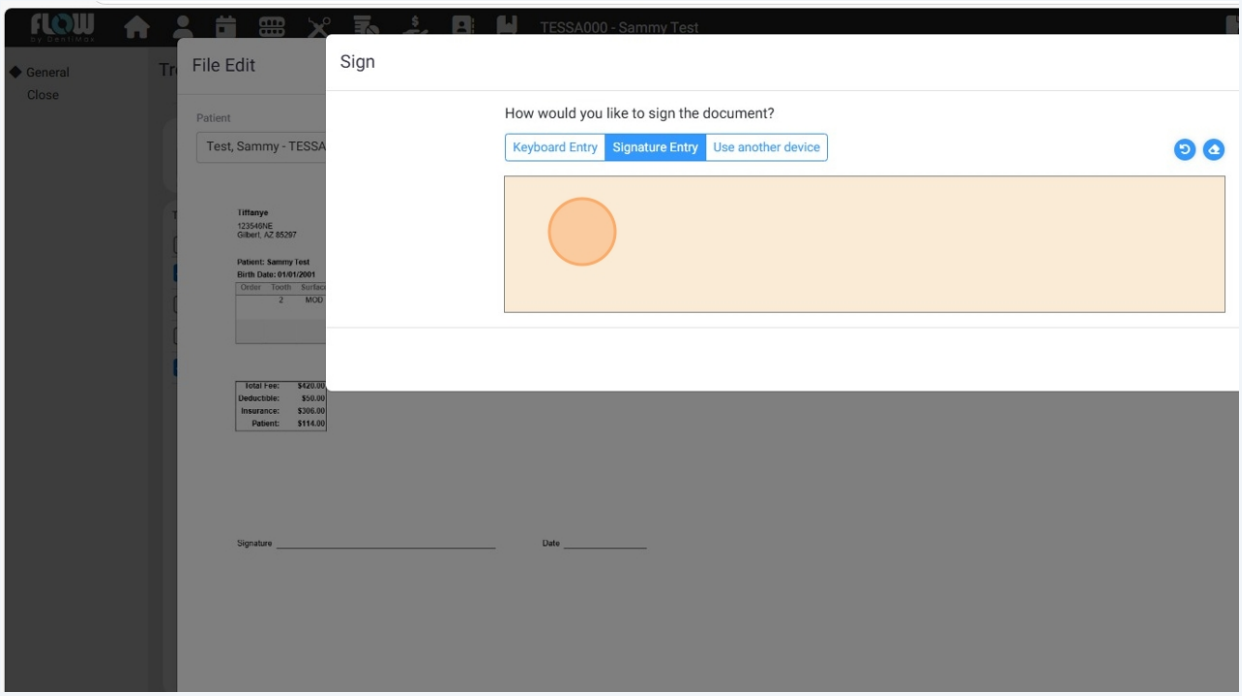


16 Keyboard Entry will allow the signer to type in their name

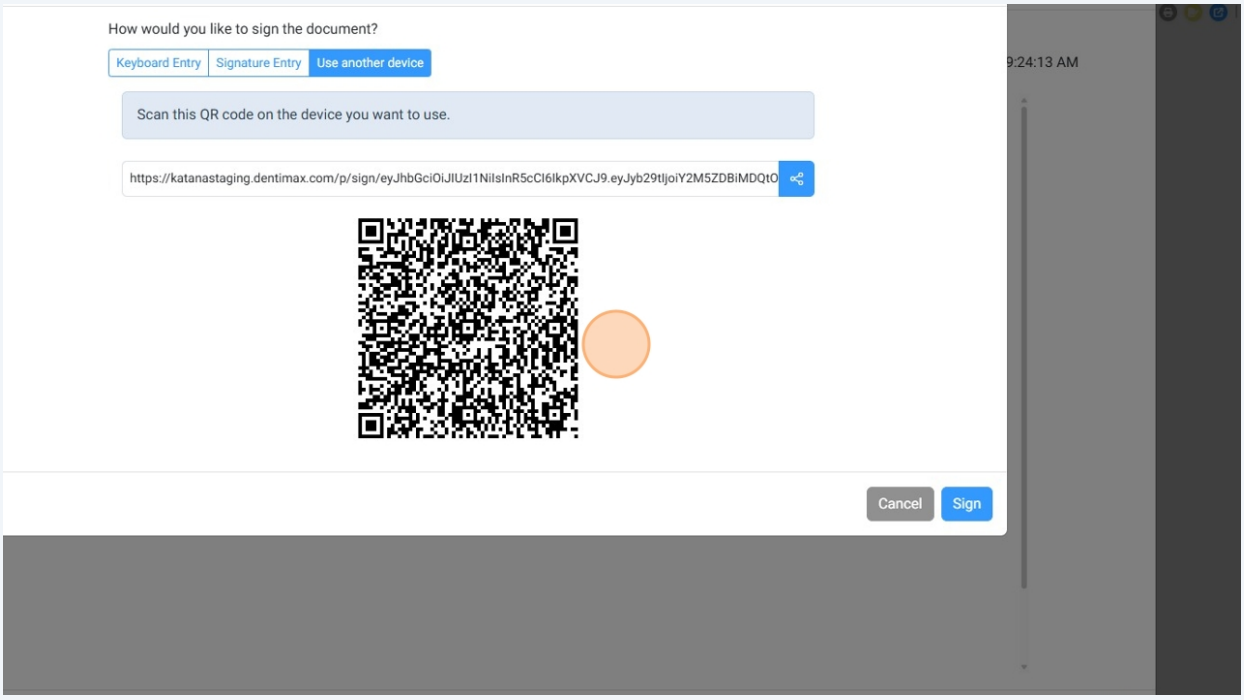


17 Signature Entry will allow signer to directly sign using the computer mouse.

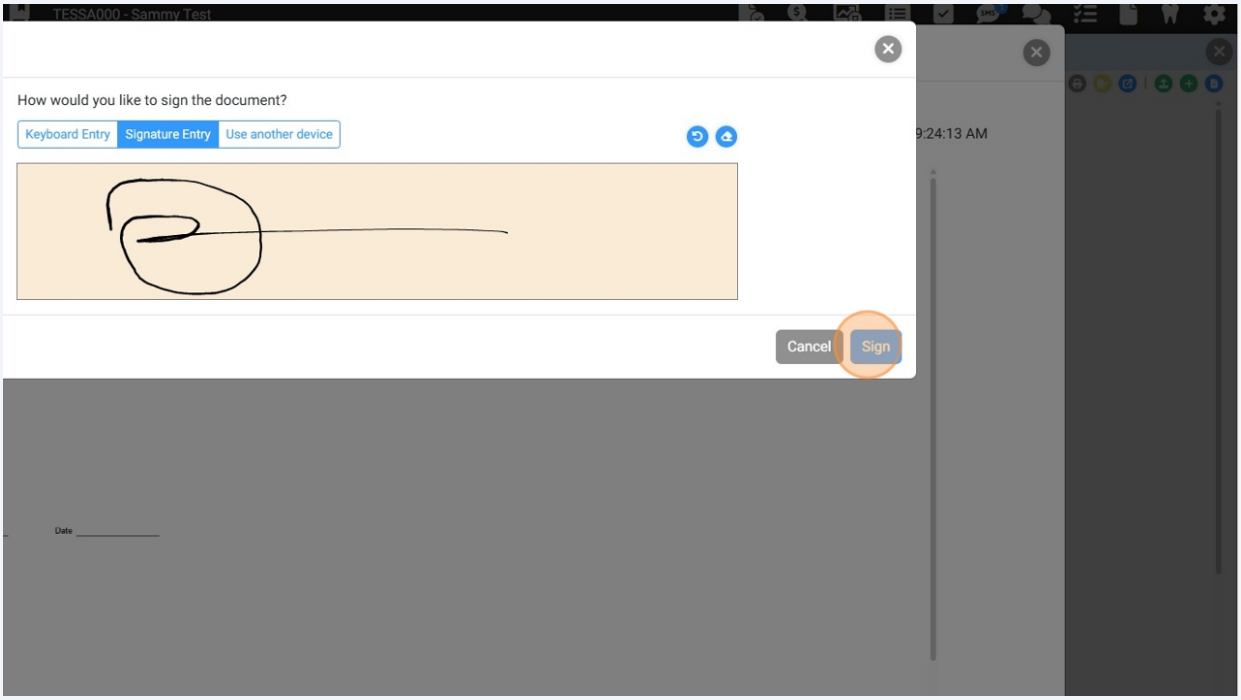
You can also use a signature pad if you have one installed, but not necessary to use this function.



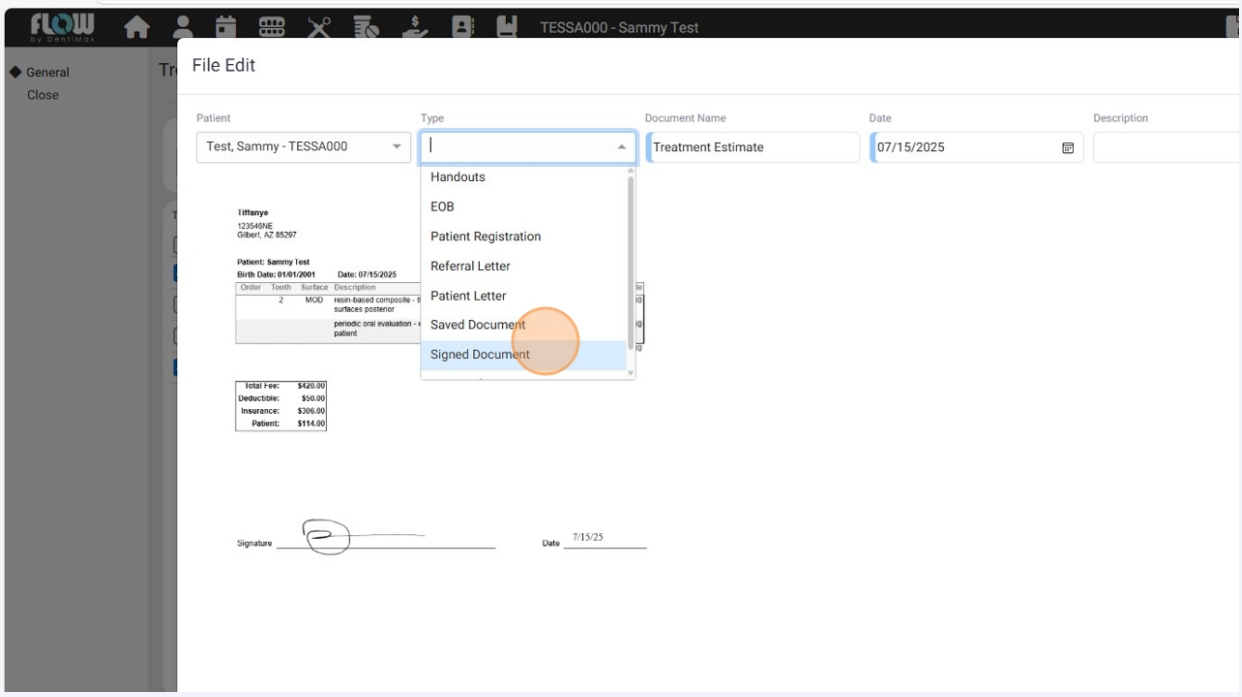
18 Use Another Device will generate a QR code that will allow the signer to use their personal smart device to sign document.



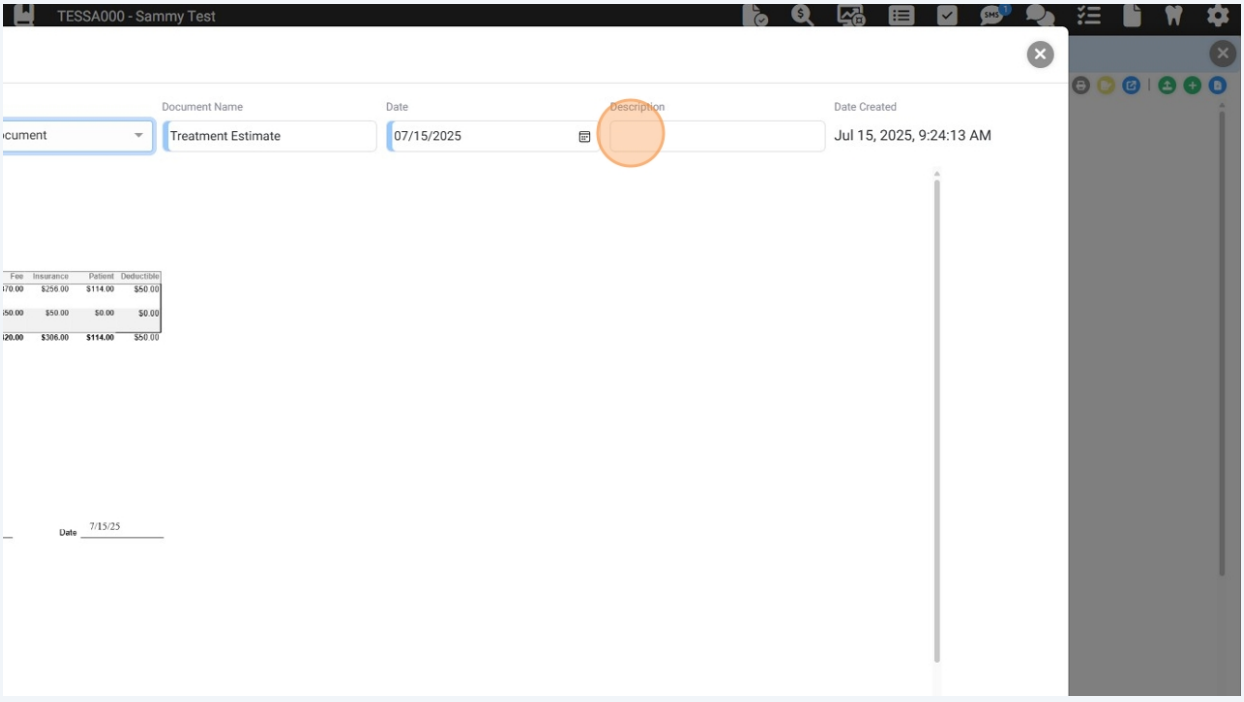
19 Once a signature is captured; Click Sign



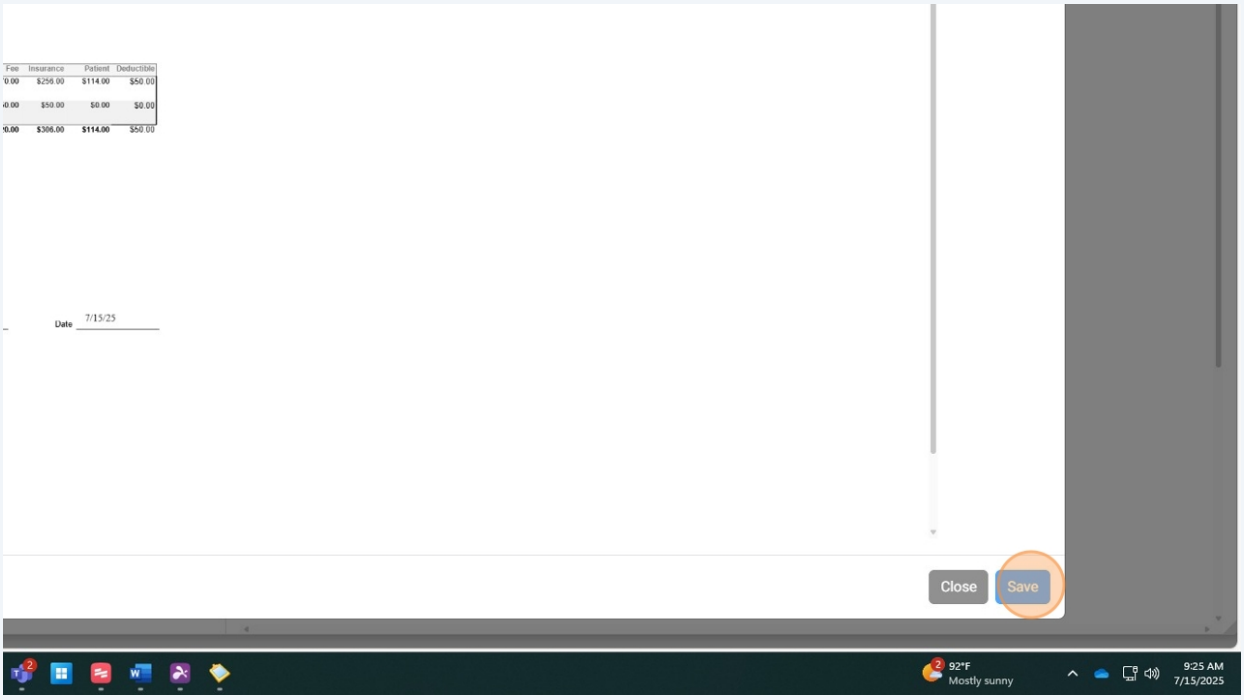
20 Select document type: Signed Document



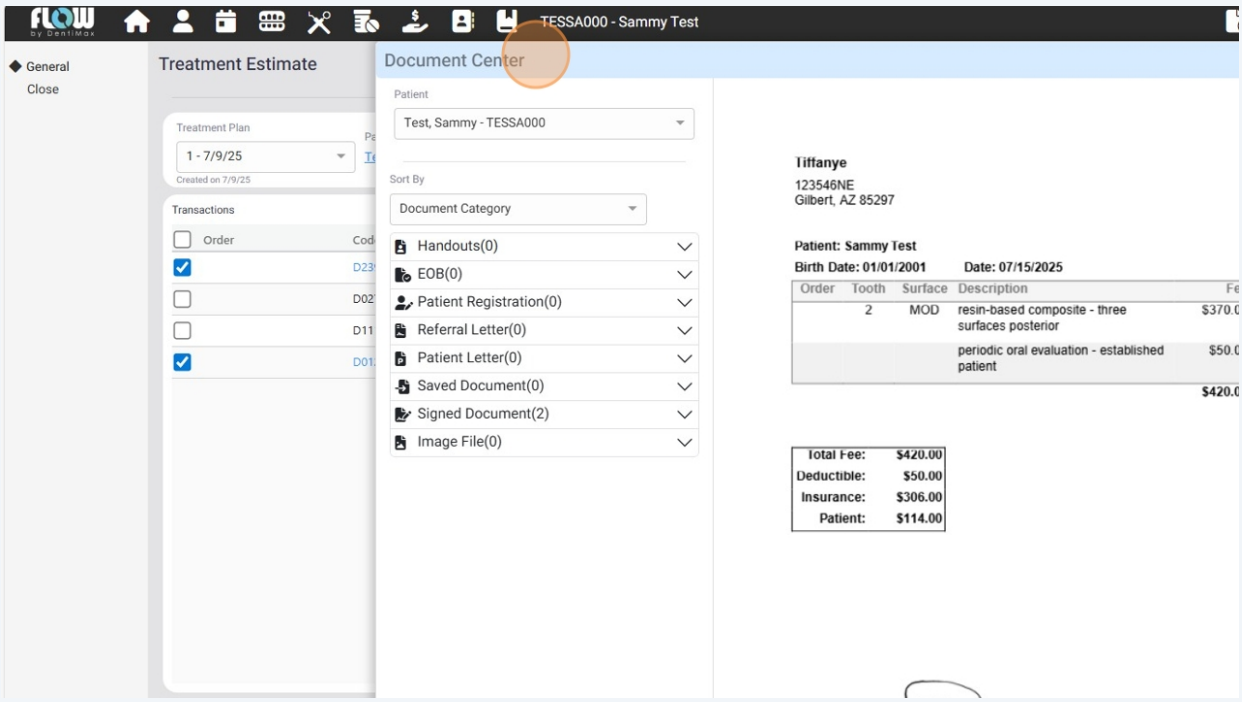
21 Name the document for easier search at a later time



22 Click "Save"

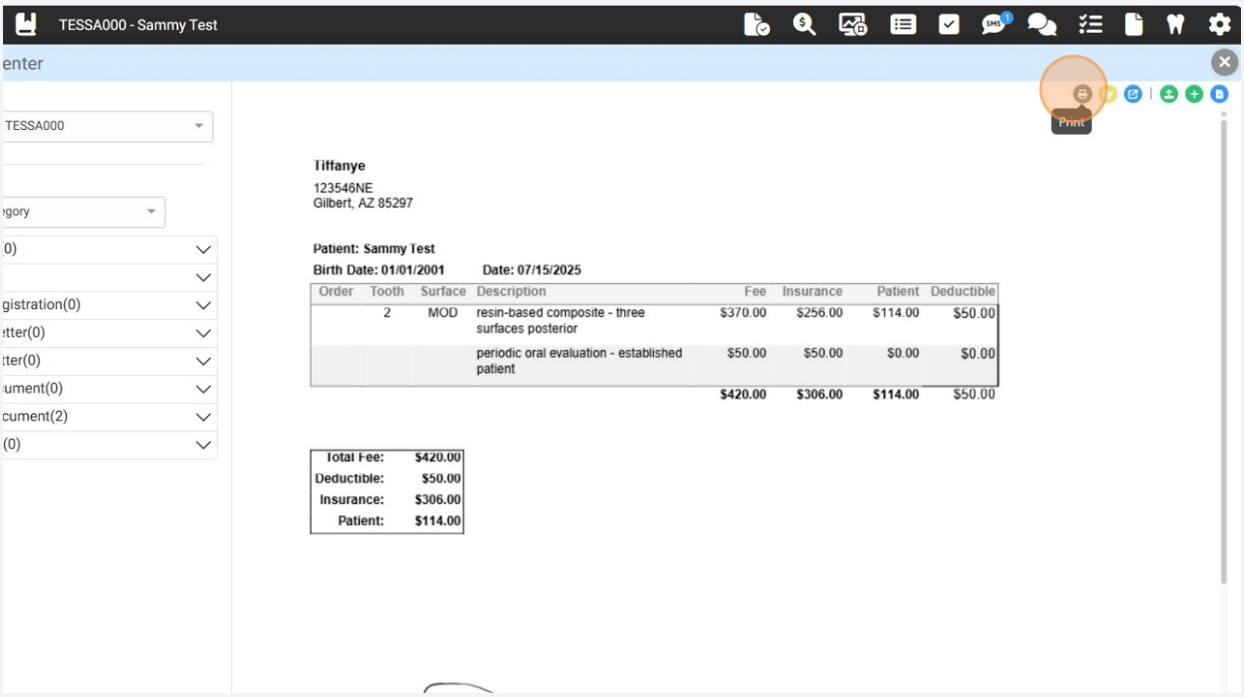


23 This will bring you into the patient Document Center; where the documents are saved

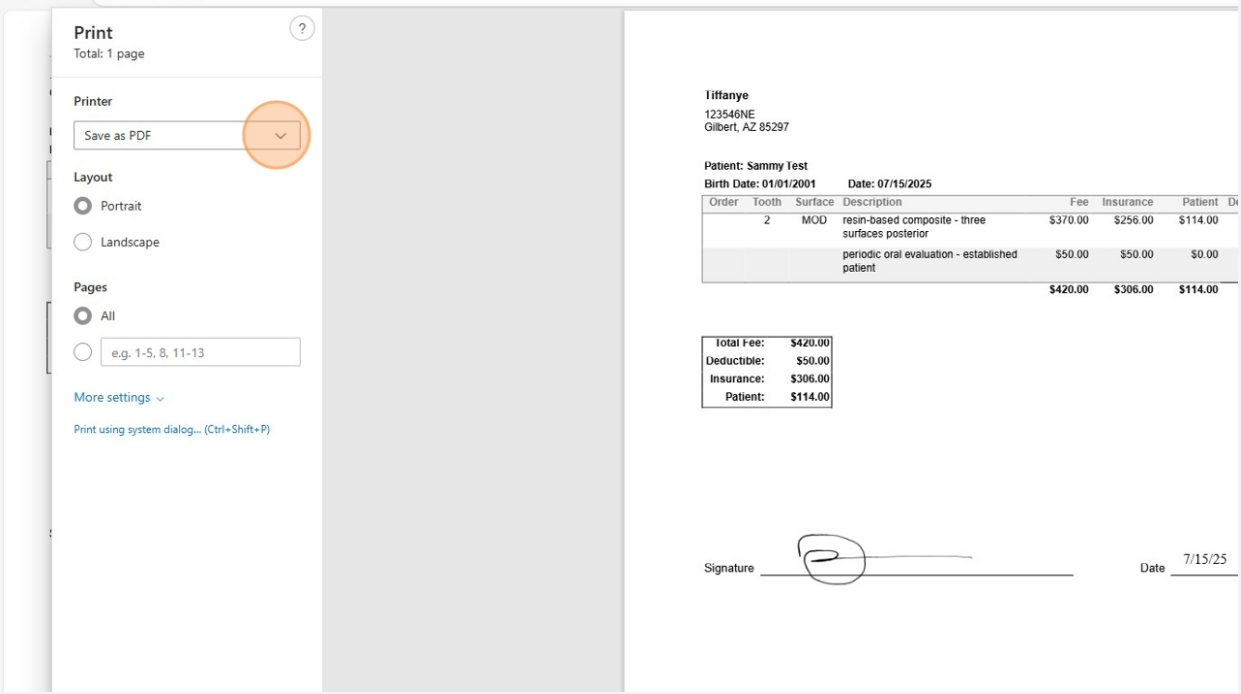


24 From here you will see your signed document. You do have the option to print from here if the patient would like a copy of the signed document.

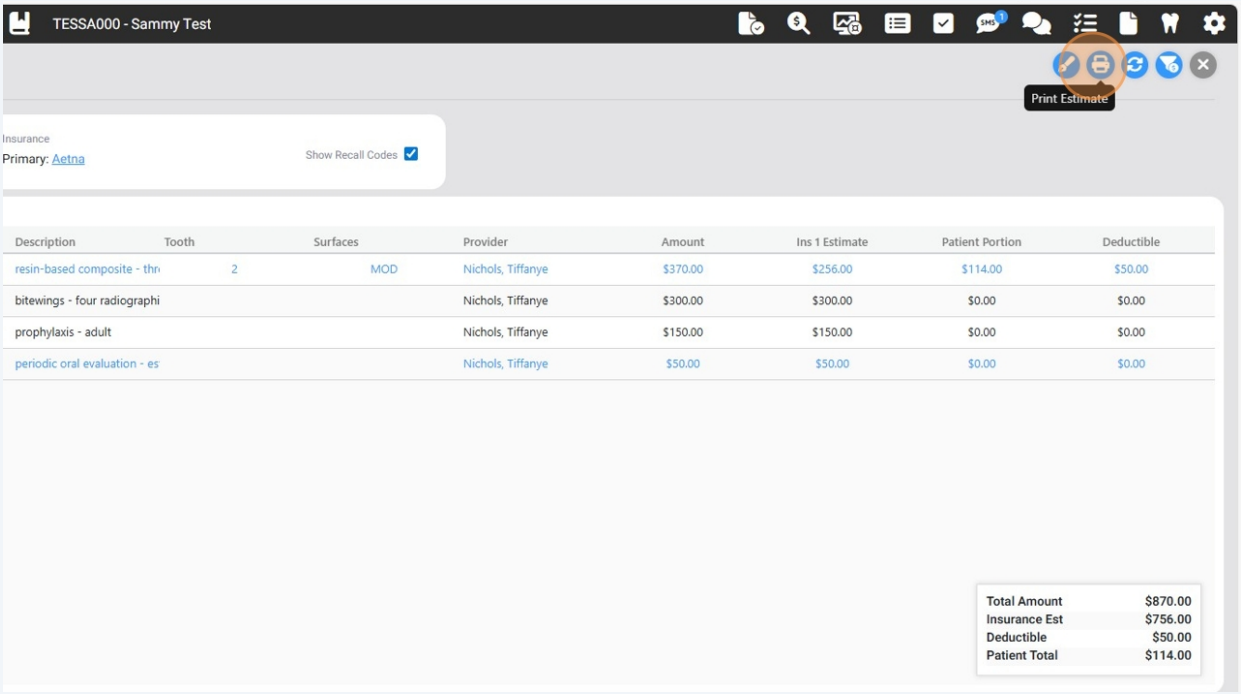
Click Print Icon



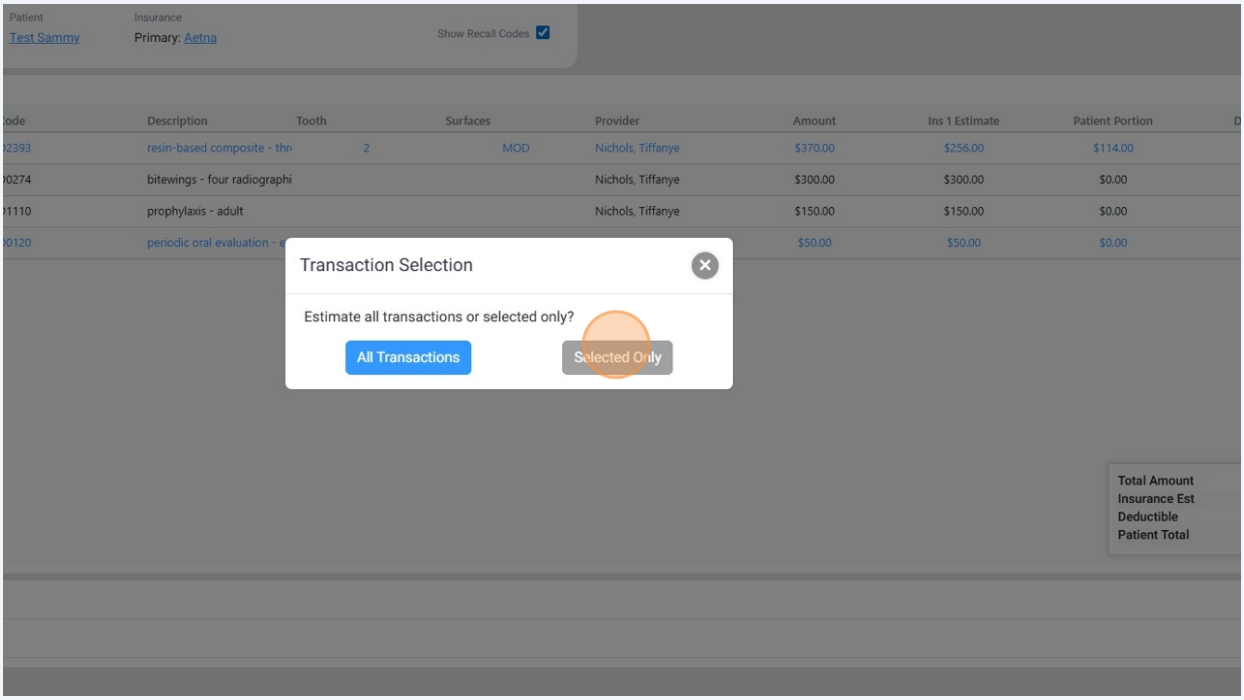
25 Select your local printer and click print



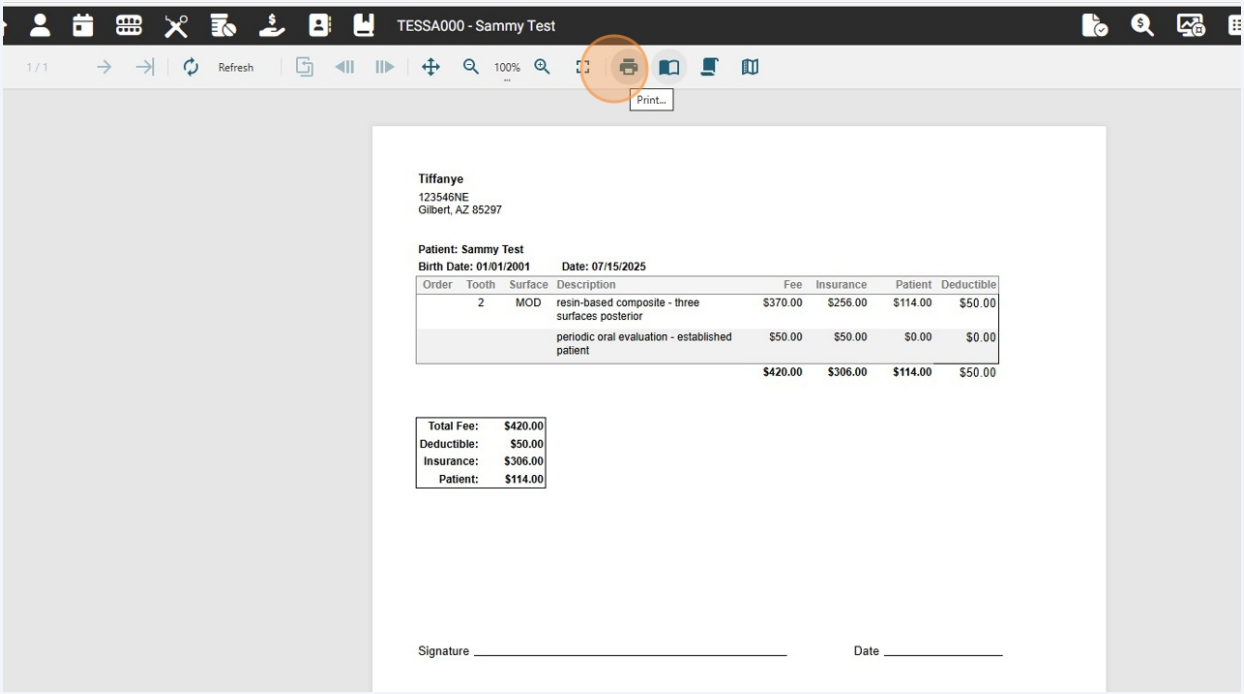
26 If you do not want to directly sign treatment plan; you can go to the print estimate option



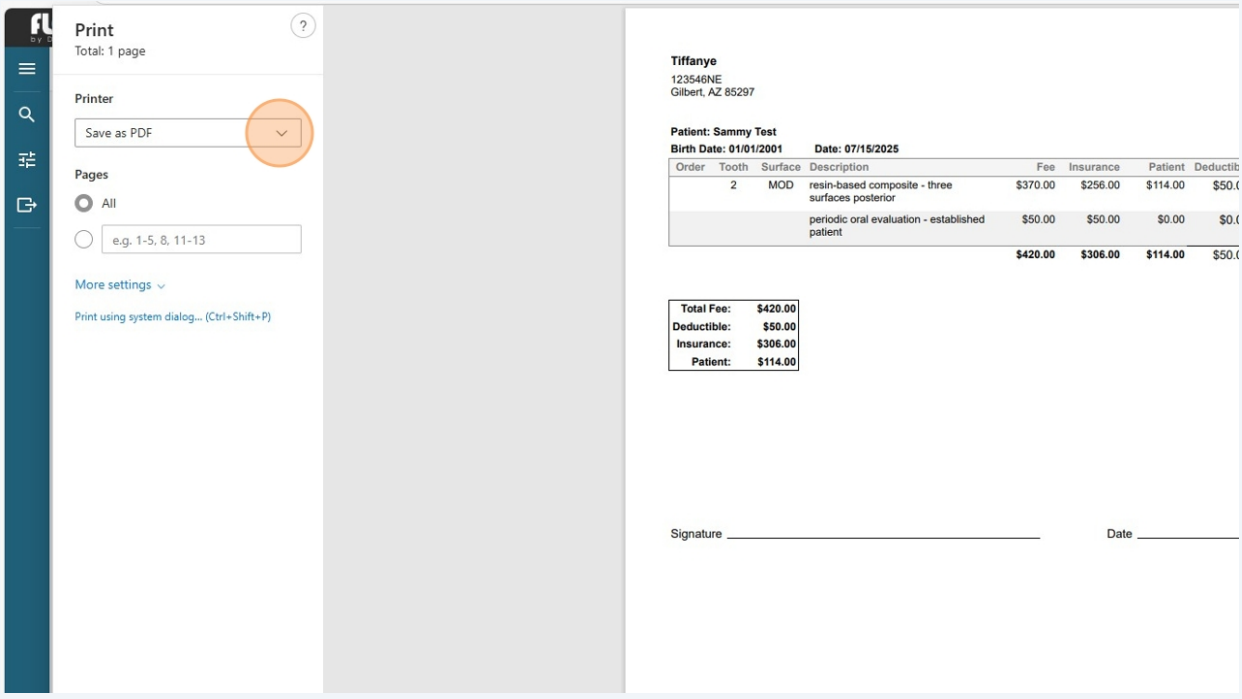
27 Select the treatment item to estimate



28 Click printer icon



29 Select local printer and click print



30 Close treatment estimate screen