



ORTHO2

Edge Signature

Edge Signature, a new, free feature in Edge, provides a way for your mail merge documents to be digitally signed or initialed by one or more parties including the patient, responsible party, orthodontist, professional, operator, and/or assistant. Use a tablet or smart phone to allow users to sign documents right in your office.

Adding Signature Fields to Merge Documents

To begin, you will need to add signature or initial merge fields to either an existing or new merge document. In the Mail Merge Documents Editor, open a letter to edit, or create a new one. In Microsoft Word, open the Add-Ins menu. Choose the Select Fields option to open the Edge Merge Field Selector window. Be sure you are viewing the Merge Variables tab.

Choose the eSign - Initials or eSign - Signature variable that corresponds to the person that needs to initial or sign the document, and click Insert. Then type a description of the intended signer, such as patient, parent or guardian, or doctor. Click Ok to insert the variable into the document. You may insert as many initials and signatures as needed. Save your document.

Mail merge documents that support digital initials and/or signatures include an Edge Signature icon  beside the name in both the Mail Merge Documents editor and the Mail Merge feature.

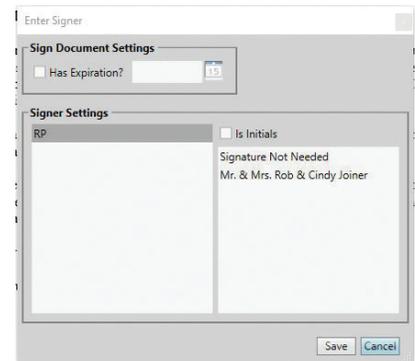
Merging Documents

Initiate your Mail Merge feature, and select an Edge Signature document. Then choose the recipient, and select the Sign merge action. Note that if you select any other Merge Action, you will not be able to digitally sign the document. You can choose to merge the document immediately, or add it to your Merge Queue.

If you merge the document immediately, you will be prompted to enter an optional expiration date for the document, as well as specify who needs to provide the

digital signature(s). If you add the document to your Merge Queue, you will be prompted for these details when you complete the document processing. Once the signers have been selected, the document is added to list of Edge Signature documents waiting to be signed.

- **Expiration Settings - (Optional.)** Enable the Has Expiration option, then enter the date the document will expire. If the document



- has not been digitally signed by that date, it will be removed from the list of pending Edge Signature documents.
- **Signer Settings -** Use the Signer Settings section of the window to identify the people that need to sign and/or initial the document.
- **Choose Signature/Initial to Work With -** The left side of the window lists all of the Edge Signature fields required by the document. The descriptions are the prompts you typed as you inserted Edge Signature variables into your mail merge document. The Is Initials option indicates whether the variable you inserted was for initials only.
- **Choose/Skip Signing Party -** The list at the right of the window includes all the people associated with the patient folder that fit the type of initials/signature you have selected at the left. You can click to select the person who should provide the signature/initials, or select Signature Not Needed to "skip" this signature/initial location.

Once you save your document, it is added to list of Edge Signature documents in progress.

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Use Edge Signature Services

You can open this feature from the Home Ribbon Bar > Tasks section > Services drop down > Signature. Or simply right click the document you wish to have signed in the Edge Signature Widget and select the signee. Log in using Edge credentials. You must have both an Edge operator user name and password to use Edge Signature. Once you have opened the Edge Signature Services website from within Edge, you may bookmark this page so you can open it from your browser.

Open the In Progress window to view and sign pending Edge Signature documents. The list also shows whether a signer has already opened the document, and completed their signature. Choose the document you want to work with and click Sign. Depending on the type of device you are using, you may use your finger, a stylus, or another pointing device (such as a mouse) to sign the signature pad. If you prefer, you can click Type Signature, then type your signature or initials on your keyboard. When finished, click Ok at the bottom of the signature pad.

Signatures In Progress

Find by name: Search

Document Name	To	Start Date	Expiration Date	
Consultation to Parent	Joiner, Carla	08/15/2017, 1:39 PM		Sign
Non Cooperation	Joiner, Carla	11/17/2017, 12:55 PM		Sign
Non Cooperation	Joiner, Carla	11/22/2017, 9:29 AM		Sign
Non Cooperation	Joiner, Carla	11/22/2017, 1:00 PM		Sign

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Save your signature. The document appears on your screen again, along with your signature. If you're satisfied, click Save at the top of the document window. Or, click the signature area to open the signature pad again and start over.

If you need to sign the document in multiple places, a list of the signatures appears at the top of the window. Click a signature link to view and sign that area of the document. When you have completed all signatures, the document is flagged as being completed.

As soon as you save your signature (or all of the signatures required from you) you are prompted to close the document. You are automatically logged out of Edge Signature so that

the next signer, if any, can log in and complete their signature. When all signatures are complete, the document is added to the patient's correspondence history.

If you have multiple documents that need your signature or initials, you can choose to process all of them in one session. Open the Multi Sign tab, click Sign beside your name, and provide your signature. When you click Continue, the next document will appear for your signature. Continue until all the documents you need to sign are processed. If a document requires another signature, such as a parent, the document remains in the In Progress tab of the Edge Signature service.

Edge Signature Widget

Use the Edge Signature widget to digitally sign documents, as well as review complete and deleted Edge Signature documents.

Click the Settings icon on the widget tool panel, then choose the status of the Edge Signature documents you wish to view: Completed, In Progress, or Deleted. You can also specify how many documents to show on one page of your widget.

The widget shows you the document name, recipient name, the date the document was first merged, and the date signatures were obtained, if any. You also see the patient's next appointment, and the document's expiration date, if any. The Deleted column indicates whether the document has been removed from Edge Signature signing requirements.



Document	To	Start Date	Completion Date	Next Appt	Expiration Date	Deleted
Breakage Problem	Mr. & Mrs. Rob & C	10/16/2017 11:12 J		Check_Wed 11/29/2017, 8:20 AM		<input type="checkbox"/>
Breakage Problem	Mr. & Mrs. Rob & C	10/17/2017 10:04 J		Check_Wed 11/29/2017, 8:20 AM		<input type="checkbox"/>

Right click on a document to change the expiration date. Alternatively, you can right click a document, and start the signing process by clicking on a person's name. A check mark will appear when that person has signed the document. ☺