



WORLDVIEW

E-Sign Physician User Guide

PHYSICIAN USER GUIDE

E-Sign



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OVERVIEW

WorldView E-Sign is a web-based way for you to quickly access and sign orders sent to you by Elevate via a secure e-mail message. There are no usernames or passwords you will have to remember to use this service. Access is granted via two-factor authentication set up for you by Elevate. This user guide will walk you through the process of accessing and signing your outstanding orders.

DEFINITION OF ROLES

Reviewer: Any person(s) set to review orders *before* they are sent to the authorized signer for signature. These individuals will have the capability to approve the order to be sent for signature or decline the order to be sent back to the agency for correction.

Signer: Any person(s) authorized to sign the outstanding order, typically a physician. These individuals will have the capability to sign or decline to sign any orders sent to them. After signature or declining, the order will be automatically redirected back to Elevate, and if set up to do so, forwarded on to the acknowledger to download a signed copy.

Acknowledger: Any person(s) set to have a signed copy of the order sent to them after the Signer has reviewed and signed the order. The signed copy will be available for immediate download.

LOGGING IN

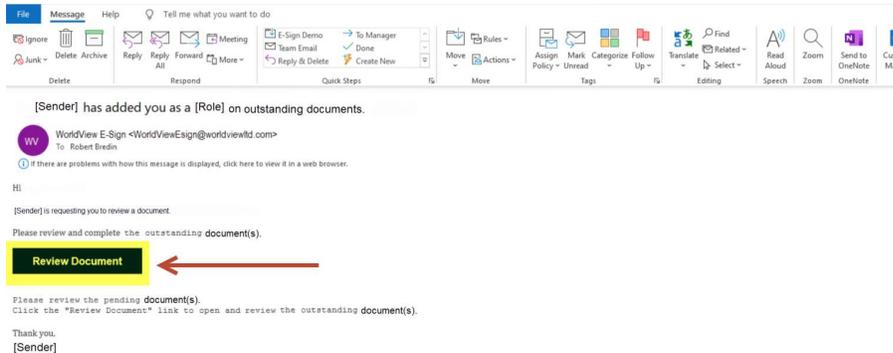
All orders will be sent to you via a secure e-mail from Elevate. You will not have to remember a username or password to use this service. Elevate has set your email address and SMS number for two-factor authentication access. Follow the instructions below to access orders via the secure email.

Accessing Orders Via Email Notification

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A secure email will be sent to you when you have outstanding orders to review or sign. To view the orders, select 'Review Document' in the email message. This will redirect you to the two-factor authentication to log in and view the orders.



Dual Factor Authentication

Choose which option you would like to verify your identity with. Either a SMS text to your preset number by Elevate or your email address. A code will be sent to your selected delivery method. Input the code and select 'Submit.'

Changing Email Address or Phone Number

There are two ways you can change your login credentials should you need to. The first would be to contact Elevate to make the changes for you. The second would be to change them manually within the portal after logging in. Follow the instructions below to change your SMS number or email address manually within the portal.

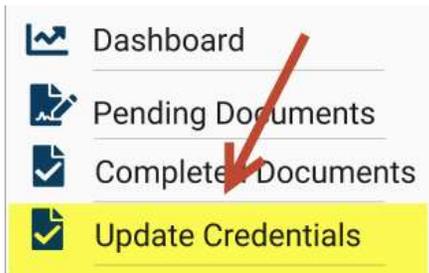
1. After logging in, navigate to the sidebar menu in the upper left corner of the screen:



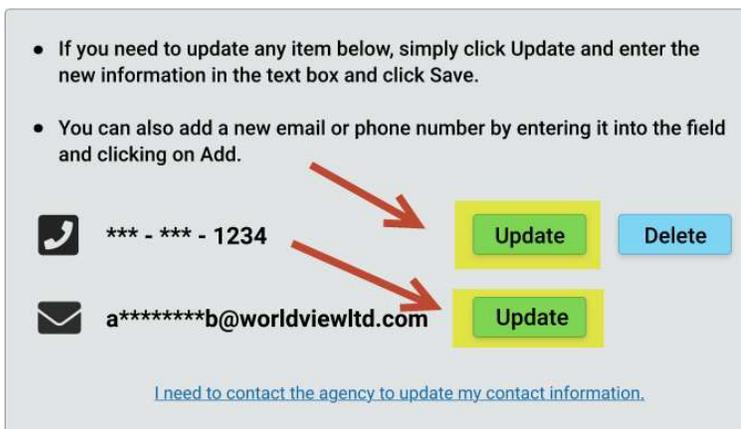
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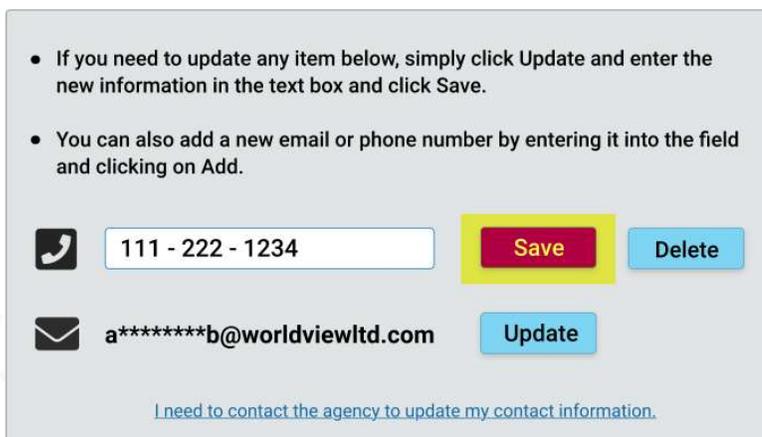
2. Select 'Update Credentials':



3. Choose which credential you would like to change and select 'Update':



4. Type our either the new SMS number or email address to update the current credential to and select 'Save':

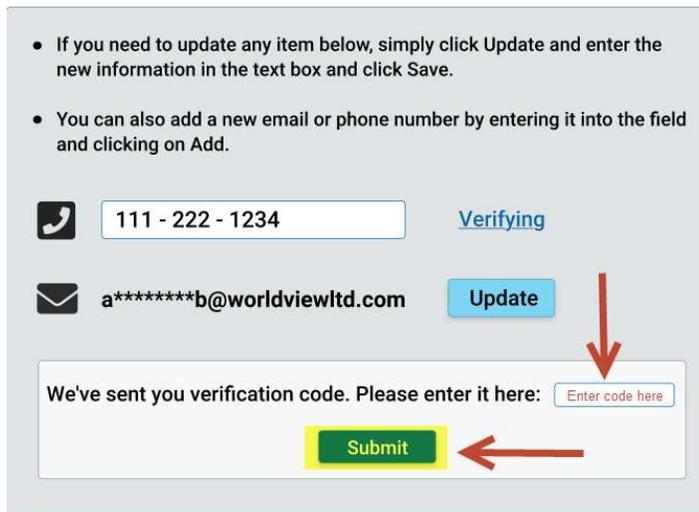


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Note: If replacing a phone number, the new number must be able to receive SMS messages to use it as a two-factor authentication credential

5. After entering the new credential, a code will be sent to the new credential for verification. Enter the code and select 'Submit':



The screenshot shows a form for updating contact information. At the top, there are two bullet points: 'If you need to update any item below, simply click Update and enter the new information in the text box and click Save.' and 'You can also add a new email or phone number by entering it into the field and clicking on Add.' Below this, there are two input fields. The first is for a phone number, containing '111 - 222 - 1234', with a 'Verifying' link to its right. The second is for an email address, containing 'a*****b@worldviewltd.com', with an 'Update' button to its right. Below these fields is a verification section with the text 'We've sent you verification code. Please enter it here:' followed by an 'Enter code here' input field. A red arrow points down to this field. Below the verification field is a yellow 'Submit' button, with a red arrow pointing left to it.

6. A success message will display, select 'Ok':



The screenshot shows a success message box with a white background and a dark border. The text inside reads 'Phone number successfully updated to 111-222-1234'. Below the text is a dark blue 'Ok' button.

LOGGING OUT

Follow the instructions below to log out of the portal.

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1. Navigate to your name in the upper right corner of the screen:



2. Select 'Logout':

PENDING DOCUMENTS

Upon logging in, you will be automatically directed to your Pending Documents. Depending on your role set up by Elevate, you will only see pending orders assigned to you. Navigate to your role below and follow the instructions for working your pending orders.

Pending Review

The Reviewer is the individual(s) responsible for reviewing an order before it is sent to the Signer for signature. The Reviewer has the capability to approve an order to be sent to the Signer or decline an order to be sent back to Elevate for correction. Follow the instructions below to view orders assigned to the Reviewer, approve an order, or decline an order.

Viewing an Order

Upon logging in, you will be automatically directed to your dashboard that shows all pending orders assigned to you for review. To view an order, simply click on the order in your dashboard to open a full copy of the order:

[Pending Approval](#)
Pending Signature
Pending Review

 Approve
 Decline

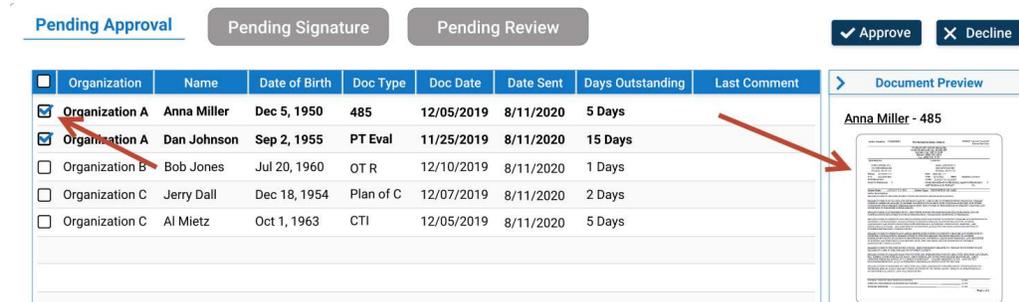
<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1965	PT		2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT		2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plafon Care	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

Note: A red arrow points to the 'Date of Birth' column for Anna Miller, and a red box highlights the 'Date Sent' column for Dan Johnson with the text 'Click on order'.

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You also can preview an order without fully opening the document. To preview an order only, check the box to the left of the order on the dashboard. A thumbnail of the order will open to the right:



The screenshot shows a dashboard with three tabs: "Pending Approval", "Pending Signature", and "Pending Review". The "Pending Approval" tab is active. Below the tabs is a table of orders. A red arrow points to the checkbox for the first order, and another red arrow points to a document preview thumbnail on the right.

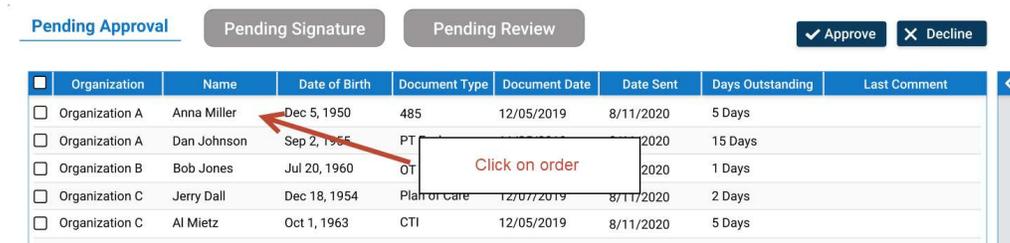
<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT R	12/10/2019	8/11/2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of C	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

Approving an Order

There are two ways to approve an order to be sent to the Signer as the Review. The first is the fully open the order to view the document and approve from there. The second, is to approve an order from a preview only directly from the dashboard. If approving from the dashboard as a preview, you can approve multiple orders at once.

To approve an order to be sent to the Signer for signature by opening and viewing the full order:

1. Click on the order you would like to view from the dashboard



The screenshot shows the same dashboard as before, but with a red arrow pointing to the first order in the table. A text box with the text "Click on order" is overlaid on the table row.

<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT		2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT		2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of Care	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

2. A full copy of the order will open, select 'Approve' in the upper right corner after reviewing the order:



The screenshot shows the document preview interface. At the top, there are tabs for "Pending Approval" and "View". Below the tabs, there is a blue bar with the text "Document Preview - REF # 12345". In the upper right corner, there are two buttons: "Approve" (with a checkmark icon) and "Decline" (with an X icon). A red arrow points to the "Approve" button.

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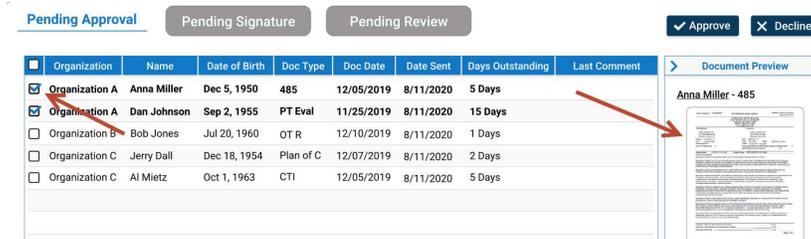
3. Select 'Ok':



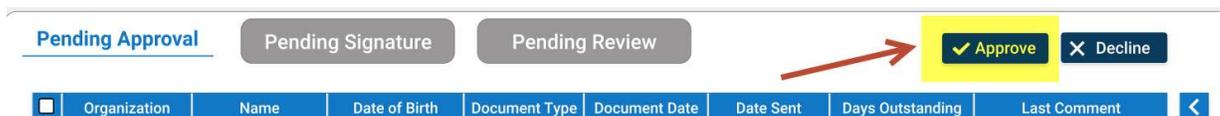
4. The order will be sent to the Signer for signature, and a copy of the order will also be placed in your Completed Documents.

To approve an order(s) directly from the dashboard follow the instructions below:

1. Check the box to the left of the order(s) directly on the dashboard. A preview of the selected order(s) will open as thumbnails to the right:



2. Select 'Approve' in the upper corner of the dashboard:



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3. Select 'Ok':



Successfully Approved

Organization	Name
Organization A	Anna Miller
Organization A	Dan Johnson

Add Comment **Ok**

Declining an Order

Follow the instructions below to decline an order to send back to Elevate for correction:

1. Follow the instructions above under 'Viewing an Order' to choose your method for how you would like to view the order(s), either by fully opening the document or previewing the document from the dashboard.
2. Select 'Decline' in the upper corner:



3. A pre-populated list of decline reasons will be listed under 'Select a reason.' These reasons are pre-set by Elevate. Select a reason:



Decline to Sign

* Select a reason

* Enter Description

Ok **Cancel**

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4. Enter a description to further clarify your reason for declining the order:



The screenshot shows a dialog box titled "Decline to Sign". It contains a dropdown menu labeled "Select a reason" with a downward arrow. Below it is a text area labeled "Enter Description" which is highlighted in yellow. At the bottom are two buttons: "Ok" and "Cancel".

5. Select 'Ok':



The screenshot shows the same "Decline to Sign" dialog box. The "Enter Description" text area is now empty. The "Ok" button is highlighted in yellow, indicating it has been selected.

6. The order will be sent back to the agency for correction with your listed decline reason. The order will also be sent to your Completed Documents and the decline reason will be attached to the order.

Adding Notes

You can apply a note to an order after approval that will be sent to the Signer. The notes will also be attached to the order in your completed documents. Follow the instructions below to apply a note to an order after approval:

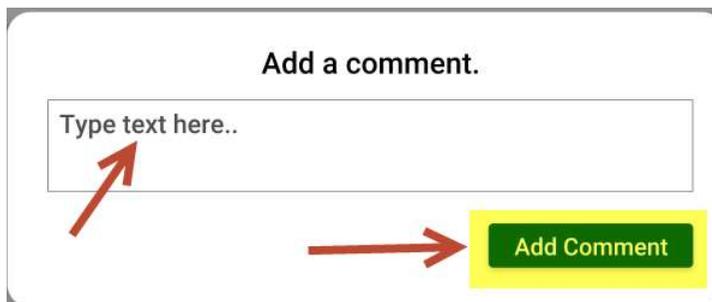
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1. Follow the instructions above under 'Approving an Order' to approve an order.
2. Once the 'Successfully Approved' box opens, select 'Add Comment':



3. A comment box will appear with a text box. Type the comment you would like to attach to the order for the Signer to see and select 'Add Comment':



4. Select 'Ok':



5. The comment will appear on the dashboard for the Signer under 'Last Comment,' and in the pane to the left of the document if the Signer opens the order to view the full document.

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Pending Signature

The Signer is the individual(s) responsible for signing an order before it is sent back to the agency. The Signer has the capability to sign an order or decline an order to be sent back to Elevate for correction. Follow the instructions below to view orders assigned to the Signer, sign an order, or decline an order.

Viewing an Order

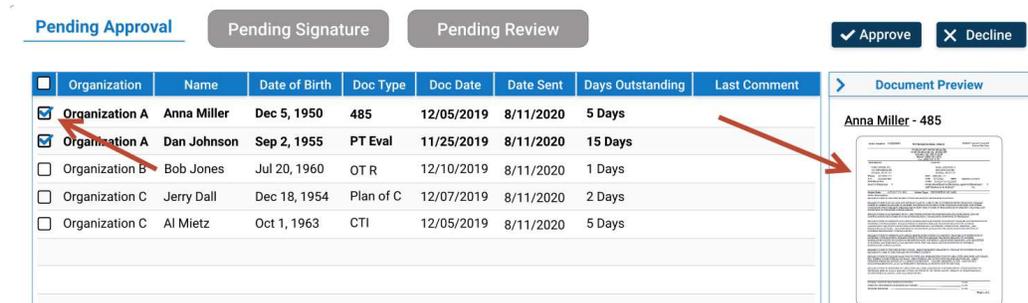
Upon logging in, you will be automatically directed to your dashboard that shows all pending orders assigned to you for review. To view an order, simply click on the order in your dashboard to open a full copy of the order:



Pending Approval | Pending Signature | Pending Review | Approve | Decline

<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT		2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT		2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of Care	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

You also can preview an order without fully opening the document. To preview an order only, check the box to the left of the order on the dashboard. A thumbnail of the order will open to the right:



Pending Approval | Pending Signature | Pending Review | Approve | Decline

<input checked="" type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT R	12/10/2019	8/11/2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of C	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

Document Preview

Anna Miller - 485



Signing an Order

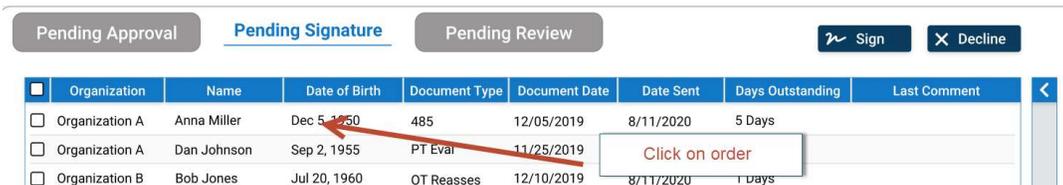
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There are two ways to sign an order to be sent back to the agency. The first is the fully open the order to view the document and sign from there. The second, is to sign an order from a preview only directly from the dashboard. If signing from the dashboard as a preview, you can sign multiple orders at once.

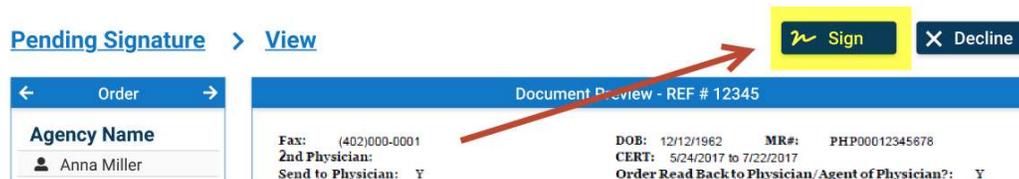
To sign an order to be sent back to the agency by opening and viewing the full order:

1. Click on the order you would like to view from the dashboard



<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019			Click on order
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT Reasses	12/10/2019	8/11/2020	1 Days	

2. A full copy of the order will open, select 'Sign' in the upper right corner after reviewing the order:



Pending Signature > View

Order

Agency Name
Anna Miller

Document Preview - REF # 12345

Fax: (402)000-0001
2nd Physician:
Send to Physician: Y

DOB: 12/12/1962 MR#: PHP00012345678
CERT: 5/24/2017 to 7/22/2017
Order Read Back to Physician/Agent of Physician?: Y

Sign **Decline**

3. Select 'Ok':



Successfully Signed

Organization	Name
Organization A	Anna Miller
Organization A	Dan Johnson

Add Comment **Ok**

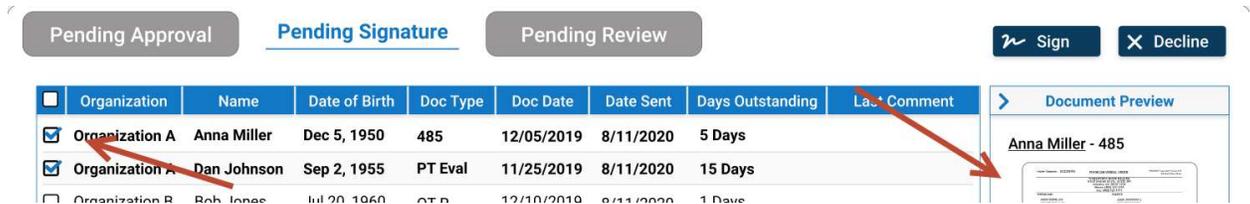
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- The order will be sent back to Elevate, and a copy of the order will also be placed in your Completed Documents.

To sign an order(s) directly from the dashboard follow the instructions below:

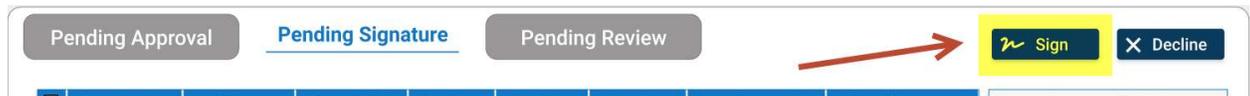
- Check the box to the left of the order(s) directly on the dashboard. A preview of the selected order(s) will open as thumbnails to the right:



<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization B	Rob Jones	Jul 20, 1960	CTD	12/10/2019	8/11/2020	1 Day	

Document Preview: Anna Miller - 485

- Select 'Sign' in the upper corner of the dashboard:



Pending Approval | Pending Signature | Pending Review | **Sign** | Decline

- Select 'Ok':



Successfully Signed

Organization	Name
Organization A	Anna Miller
Organization A	Dan Johnson

Add Comment | **Ok**

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Declining an Order

Follow the instructions below to decline an order to send back to Elevate for correction:

1. Follow the instructions above under 'Viewing an Order' to choose your method for how you would like to view the order(s), either by fully opening the document or previewing the document from the dashboard.
2. Select 'Decline' in the upper corner:



3. A pre-populated list of decline reasons will be listed under 'Select a reason.' These reasons are pre-set by Elevate. Select a reason:



Decline to Sign

* Select a reason 

* Enter Description

Ok Cancel

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4. Enter a description to further clarify your reason for declining the order:



The screenshot shows a dialog box titled "Decline to Sign". It contains a dropdown menu labeled "Select a reason" with a downward arrow. Below it is a text area labeled "Enter Description" which is highlighted with a yellow background. At the bottom are two buttons: "Ok" and "Cancel".

5. Select 'Ok':



The screenshot shows the same "Decline to Sign" dialog box. The "Enter Description" text area is now empty. The "Ok" button is highlighted with a yellow background, indicating it is the selected option.

6. The order will be sent back to the agency for correction with your listed decline reason. The declined order will also be placed in your completed documents, and the decline reason will be attached to the order.

Adding Notes

You can apply a note to an order after signing that will be sent to Post-Signature Review. The notes will also be attached to the order in your completed documents. Follow the instructions below to apply a note to an order after signing:

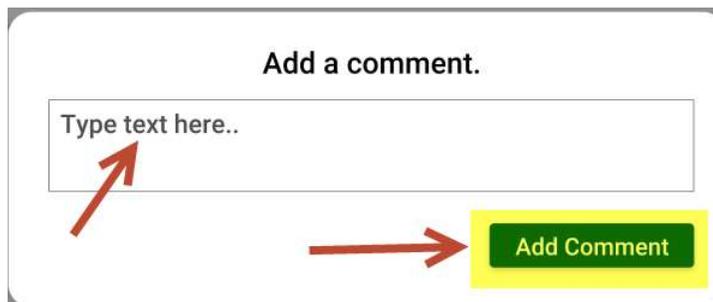
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1. Follow the instructions above under 'Signing an Order' to sign an order.
2. Once the 'Successfully Signed' box opens, select 'Add Comment':



3. A comment box will appear with a text box. Type the comment you would like to attach to the order for the Signer to see and select 'Add Comment':



4. Select 'Ok':



5. The comment will appear on the dashboard for Post-Signature Review under 'Last Comment,' and also in the pane to the left of the document if Post-Signature Review opens the order to view the full document.

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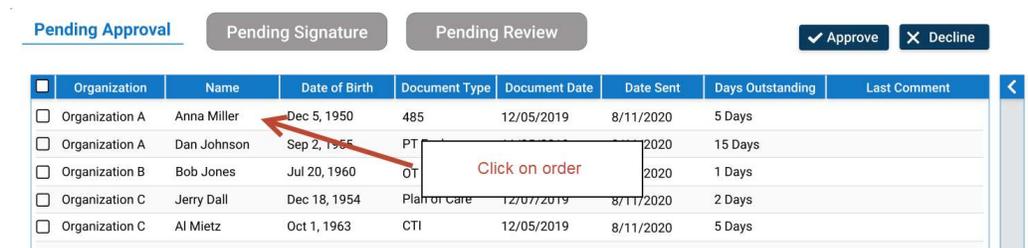


Post Signature Review

Post Signature Review is the individual(s) responsible for reviewing or downloading an order after the order has been signed by the Signer. Follow the instructions below to review or download orders signed by the Signer for your organization's records.

Viewing an Order

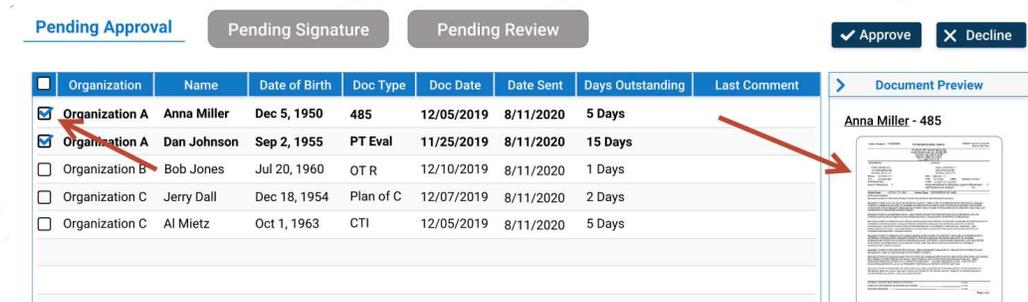
Upon logging in, you will be automatically directed to your dashboard that shows all signed orders assigned to you for review or download. To view an order, simply click on the order in your dashboard to open a full copy of the order:



Pending Approval Pending Signature Pending Review Approve Decline

<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1965	PT		2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT		2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of Care	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

You also can preview an order without fully opening the document. To preview an order only, check the box to the left of the order on the dashboard. A thumbnail of the order will open to the right:



Pending Approval Pending Signature Pending Review Approve Decline

<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT R	12/10/2019	8/11/2020	1 Days	
<input type="checkbox"/>	Organization C	Jerry Dall	Dec 18, 1954	Plan of C	12/07/2019	8/11/2020	2 Days	
<input type="checkbox"/>	Organization C	Al Mietz	Oct 1, 1963	CTI	12/05/2019	8/11/2020	5 Days	

Document Preview

Anna Miller - 485



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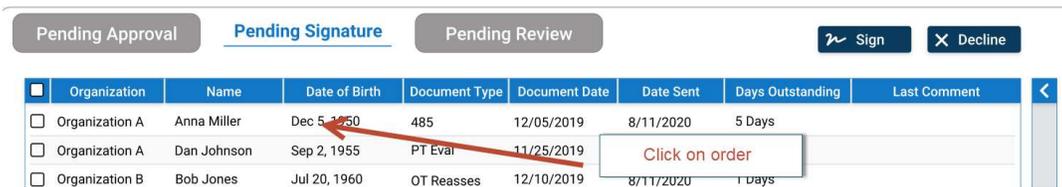


Downloading an Order

There are two ways to download an order signed by the Signer. The first is to fully open the order to view the document and download from there. The second, is to download an order from a preview only directly from the dashboard. If downloading from the dashboard as a preview, you can download multiple orders at once.

To download an order for your organization's records by opening and viewing the full order:

1. Click on the order you would like to view from the dashboard



<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019			
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT Reasses	12/10/2019	8/11/2020	1 Days	

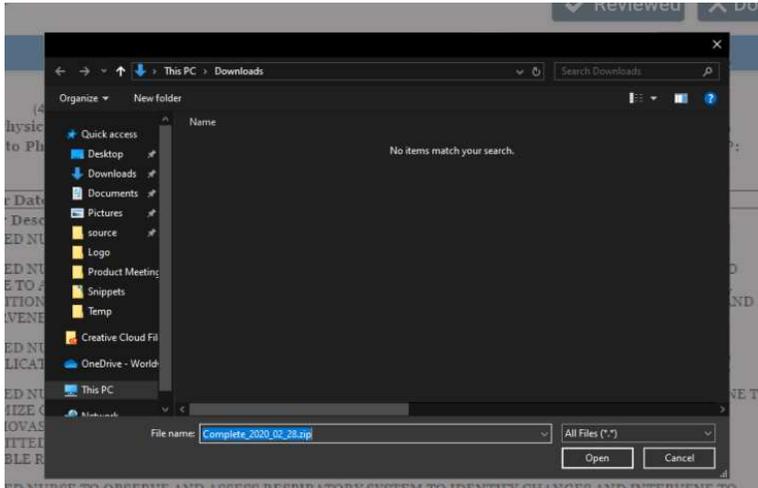
2. A full copy of the order will open, select 'Sign' in the upper right corner after reviewing the order:



3. Select the location on your computer you would like the downloaded copy of the signed order to be placed:

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4. A copy of the signed order will be placed in the location you selected and the downloaded order will be placed in your completed documents in your dashboard.

To download an order(s) directly from the dashboard follow the instructions below:

1. Check the box to the left of the order(s) directly on the dashboard. A preview of the selected order(s) will open as thumbnails to the right:



<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT R	12/10/2019	8/11/2020	1 Days	

2. Select 'Sign' in the upper corner of the dashboard:

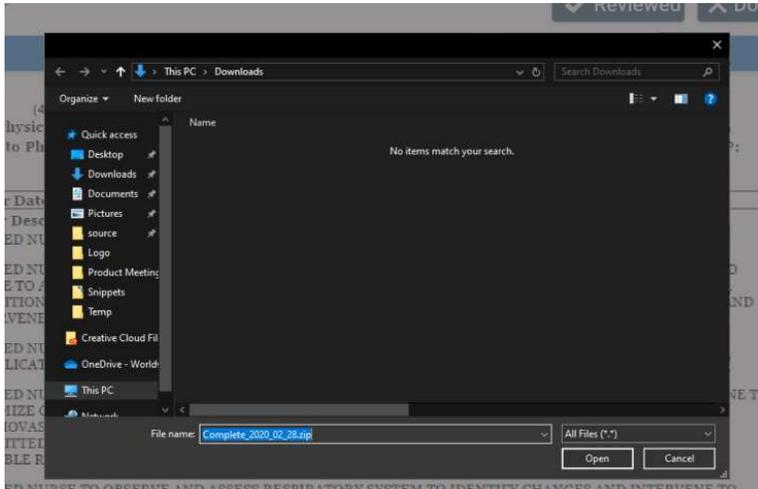


<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	

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3. Select the location on your computer you would like the downloaded copy of the signed order(s) to be placed:



4. A copy of the signed order(s) will be placed in the location you selected. The order will still need to be reviewed to move from your Pending Documents to Completed Documents. Please follow the instructions below under 'Reviewing an Order' to complete the final steps.

Reviewing an Order

You are also able to review a signed order without downloading to be sent to your completed documents on your dashboard. All downloaded orders will need to be reviewed as well to move them out of your Pending Documents and to your Completed Documents. This way, you can distinguish new orders sent to you by the Signer.

Follow the instructions below to Review a signed order(s) to be sent to your Completed Documents:

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1. Click on the order you would like to view from the dashboard



Pending Approval Pending Signature **Pending Review** Reviewed Download

<input type="checkbox"/>	Organization	Name	Date of Birth	Document Type	Document Date	Date Sent	Days Outstanding	Last Comment
<input type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	1 Days	
<input type="checkbox"/>	Organization B	Bob Jones	Jul 20, 1960	OT Reasses	12/10/2019	8/11/2020	1 Days	

2. A full copy of the order will open, select 'Reviewed' in the upper right corner after reviewing the order:



Pending Review > View

Order > Document Preview - REF # 12345 > Document Preview

Agency Name: Anna Miller

Fax: (402)000-0001 2nd Physician: [Name]

DOB: 12/12/1962 MR#: PHP00012345678 CERT: 5/24/2017 to 7/22/2017

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3. Select 'Ok':



Successfully Reviewed

Organization	Name
Organization A	Anna Miller
Organization A	Dan Johnson

Add Comment **Ok**

4. The signed order will be to your completed documents.

To review an order(s) directly from the dashboard follow the instructions below:

1. Check the box to the left of the order(s) directly on the dashboard. A preview of the selected order(s) will open as thumbnails to the right:

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Pending Approval Pending Signature **Pending Review** Reviewed  Download

<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	
<input type="checkbox"/>	Organization R	Rob Jones	Jul 20, 1960	CT P	12/10/2019	8/11/2020	1 Days	

Document Preview: Anna Miller - 485

2. Select 'Reviewed' in the upper corner of the dashboard:



Pending Approval Pending Signature **Pending Review** Reviewed  Download

<input type="checkbox"/>	Organization	Name	Date of Birth	Doc Type	Doc Date	Date Sent	Days Outstanding	Last Comment
<input checked="" type="checkbox"/>	Organization A	Anna Miller	Dec 5, 1950	485	12/05/2019	8/11/2020	5 Days	
<input checked="" type="checkbox"/>	Organization A	Dan Johnson	Sep 2, 1955	PT Eval	11/25/2019	8/11/2020	15 Days	

Document Preview: Anna Miller - 485

3. Select 'Ok':



Successfully Reviewed

Organization	Name
Organization A	Anna Miller
Organization A	Dan Johnson

Adding Notes

You can apply a note to an order after Reviewing if you are choosing not to download the order. The notes will also be attached to the order in your completed documents. Follow the instructions below to apply a note to an order after reviewing:

1. Follow the instructions above under 'Reviewing an Order' to review an order.

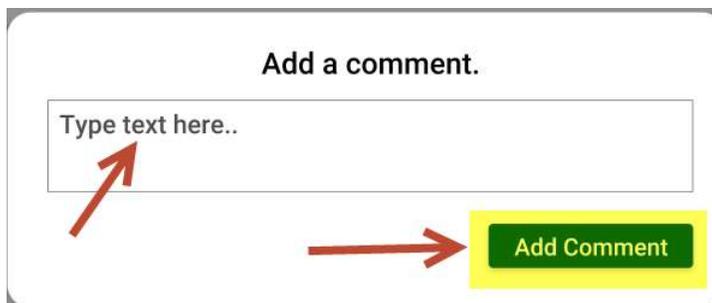
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2. Once the 'Successfully Reviewed' box opens, select 'Add Comment':



3. A comment box will appear with a text box. Type the comment you would like to attach to the order for the Signer to see and select 'Add Comment':



4. Select 'Ok':



5. The comment will appear with the order under your Completed Documents.

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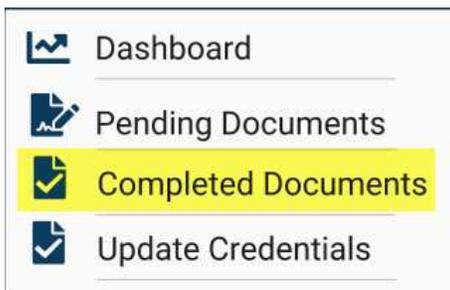
COMPLETED DOCUMENTS

After working Pending Documents assigned to you, the documents will be automatically placed in your Completed Documents area. The document will stay in the Completed Documents area for 90 days. While the document is in your Completed Documents, you will have the ability to view the document and download the document if needed. To navigate to your Completed Documents:

1. Select the sidebar menu in the upper left corner of the screen:



2. Select 'Completed Documents':



Any notes applied to the document will be able to be viewed by opening the document. Follow the instructions under your role above for viewing documents in your Completed Documents Area.

If you need to download documents from the Completed Documents area:

1. Select the document(s) you would like to download:



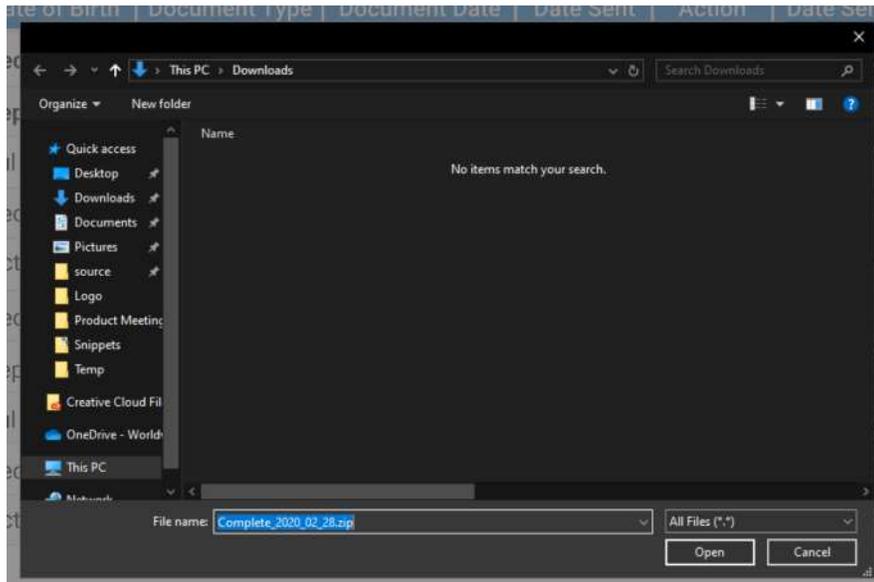
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2. Select 'Download Selected' in the upper right corner:



3. Select the area on your computer you would like the downloaded copies of the orders to be placed:



4. A downloaded copy of the order(s) will be sent to the selected area.

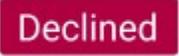
There will also be color coded tags next to your Completed Documents to signify the action taken on the document from the Pending Documents area. Depending on your role, you may see multiple types of tags.

	When the Reviewer approves an order to be sent to the Signer for Signature
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	When the Signer signs an order
	When Post-Signature Review reviews an order
	When either the Reviewer or Signer declines an order. The decline reason will also be listed under the 'Reason' column

DASHBOARD

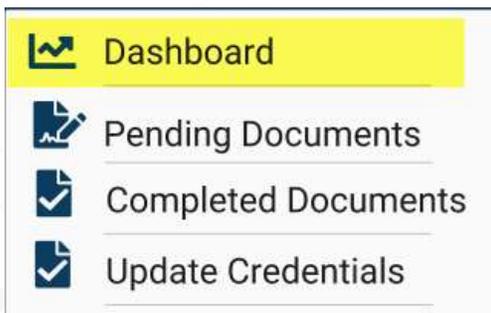
The purpose of the Dashboard is to show data regarding number of Pending Documents and average days outstanding for those documents. If you are assigned as a Reviewer or Signer, the Dashboard will also show the number of orders you have declined plus reasons for declining.

To navigate to your dashboard:

1. Select the sidebar menu in the upper left corner of the screen:



2. Select 'Dashboard':



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If you receive orders from more than one agency, the agencies will be separated by color in the presenting chart. If you are a Signer or Reviewer and would like to view decline reasons per agency, click on the 'Declines per Agency' chart to view decline reasons on an agency-by-agency basis.



NOTIFYING AGENCY OF ISSUE

Should you need to contact Elevate regarding any questions or issues, please contact:

TBD