

# ClinicOffice

## E-Docs User Guide

One of the biggest time consumers for Clinics can be the long wait while patients fill in and sign a medical history form or something similar. ClinicOffice assists with this by allowing you to create your own forms and then email them out to patients. Once completed, ClinicOffice can store the forms or save them as PDF documents within the patient record that they relate to.

This feature also allows for the collection of electronic signatures and therefore replaces the current E-Sign feature.

To use our **ClinicOffice E-Docs** service, you need the following: -

- ClinicOffice (Local or Cloud Hosted editions)
- If you have a Local install of ClinicOffice, then you also require the “**Online Services**” with your subscription.
- A touchscreen device such as a tablet, preferably with at least a 10” screen (Only needed if you plan to use this within the Clinic.)

Please click the link below to find out more about the benefits of **E-Docs** and the required specifications of your tablet device: <https://pioneersoftware.co.uk/co-edocs>

This document will cover 3 main sections.

[Section A – Using E-Docs to capture a patient’s signature](#)

[Section B - How to create and send a form to patients, such as a medical history form](#)

[Section C – Using the E-Docs Manager](#)

## [SECTION A] - SIGNATURE CAPTURE

### [1] Preparing a Document for Signature Capture

This feature directly replaces the ‘E-Sign’ feature and so much of it works in exactly the same way. To create your document, please follow the steps below.

1. In ClinicOffice go to the **Reports and Templates** section
  - a. *Right-click* on a Letter Template (e.g. “*Letter to Patient*”) that you wish to use as a basis for the new E-Sign document and click **Copy**
  - b. This creates a copy e.g. “*Letter to Patient (copy 1)*”. *Right-click* on that copied template and click **Rename** to give it a new name (e.g. “*Patient Consent*”)
  - c. Now *right-click* your new Letter Template and click **Edit Template**
2. In the document itself, *left-click* to place the cursor on the spot where you wish the signature to be inserted
3. Go to the **INSERT** tab (at the top) and click the **Signature Point** button

You will now see the text **[SIGN HERE]** inserted into your document. You can insert more than one signature point into the document if required.

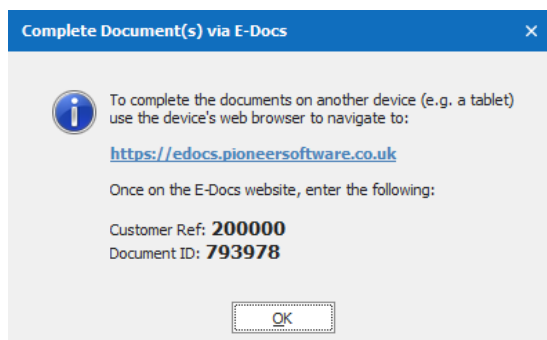
Once you’ve finished, click the **Save Template** button and close the document editor.

### [2] Capturing a Client’s Signature

1. To create the E-Docs document, simply merge your Letter Template with a patient record. The recommended way to do this is: -
  - a. Open a patient record and click the **Print** button (at the top)
  - b. Select the document template (e.g. “*Patient Consent*”) created in section [1]
  - c. This will open the document and merge in the patient’s details

2. You will now see a button to the top left of your screen that says “**Send to E-Docs**” [clicking this opens the E-Docs Manager, which is covered more fully in [Section C](#)]
3. For now, just click “Generate E-Docs” and select “Use a Tablet”  
 [Using a tablet (or another device) allows you to open the document with the patient present, and you can hand them a tablet for them to review and sign. Sending an email link allows the patient to fill it out in their own time.]

A message will now appear providing you with your Customer Reference and the Document ID, and a link to the document (see below).



**NOTE:** Letter Templates can be merged with multiple patient records, however when creating an E-Sign document which is to be signed by ONE person, you obviously only want ONE patient record. Using the PRINT button in the patient record (as described above) ensures that only one patient record is merged into the template.

4. On your tablet or other device, enter in the Customer Reference and Document ID into the E-Sign website and click the **Load E-Document** button
5. The document should now appear, and you can hand the device over to the client
6. If they’re happy to sign it, then they should :-
  - a. Make sure their name appears correctly in the box at the bottom of the screen (if it’s incorrect, they can tap on it to correct it)
  - b. Use their finger (or stylus of the device has one) to sign their name in the box. If they make a mistake or the signature is inadequate, they can click the **Clear** button to start again
  - c. Click the **SIGN** button to insert their signature into the document
  - d. (If there are multiple signatures required, step (c) will need to repeated)



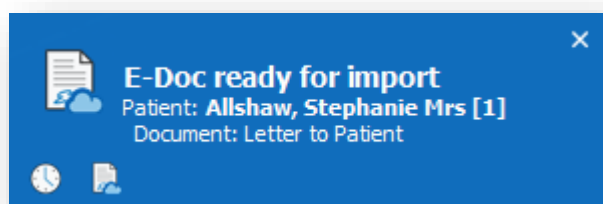
7. Finally, they can click the **FINISH** button and hand back the device

**NOTE:** If the document has multiple signature points, then the patient will need to click the **SIGN** button more than once to reflect each signature. For example, if it’s a 2-page document with signature points at the bottom of each

page, the patient will to press **SIGN** twice before being able to press the **FINISH** button.

Once the document has been signed, a popup notification message will appear in ClinicOffice (at the bottom right).

You can click the **Open E-Docs Manager** (📄) button on the popup notification to view the signed document.



The final step is to then import the signed document. Clicking on the notification will open the E-Docs Manager, or alternatively, you can find it on the drop-down arrow under the patients button. We will cover how to operate the E-Docs Manager in [Section C](#).

### **Q. I accidentally clicked OK to the “Document Uploaded to E-Sign” message before making note of the Document ID. Where can I find this number again?**

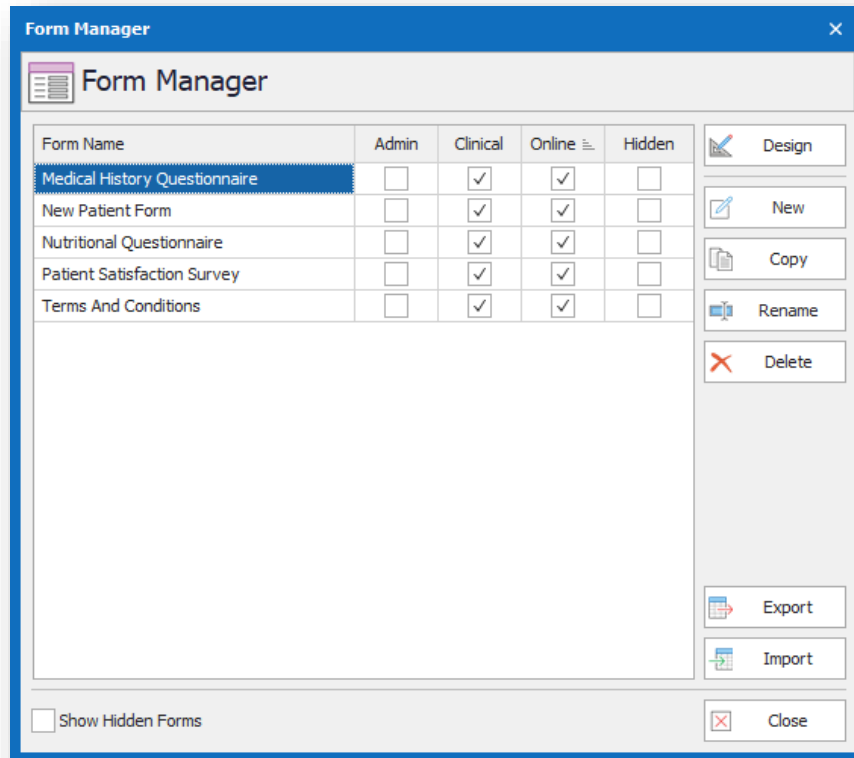
A. You can retrieve the Document ID from the E-Sign Manager, by clicking the lower-half of the **Patients** button on the Home menu in ClinicOffice and selecting E-Sign Manager from there you will see the document and it will state “In Progress” and will provide the **Document ID** in the first column on the left.

## **[SECTION B] – MAKING A FORM E-DOCS COMPATIBLE**

This feature allows you to create and send a form to a patient via email for them to complete and return. For example, a Medical History form, or COVID-19 Symptoms form.

1. Firstly, you need to create your form within ClinicOffice. As mentioned at the outset, if you are not using the Hosted edition then you will also need the “**Online Service**” subscription to use this feature.
2. To access the Form Manager, head to the ‘**Tools**’ tab in ClinicOffice, and then click ‘**Forms Manager**’.

3. To make the form compatible with the E-Docs service you just need to make sure that the **'Online'** checkbox is ticked. Also, select whether this is to be a "Clinical" or "Admin" form, **OR** both.



An **Admin** form would only allow the form to be saved in the patients documents area. This would be useful for things like "Information Sharing Consent" for example or any forms that only need to be completed once.

A **Clinical** form would be a form that gets attached to a patients clinical notes and has direct relation to treatments. This would be useful for "Consent to Treatment" type forms.

A form can also be **both**. This might be useful for any type form where you want to have both a copy on the patients documents section and on their Clinical Notes.

Once you are happy with the form, you just need to make sure that the **Online** box is checked, and the form is then ready to be sent out via E-Docs to a patient. To do this, you will need to access the E-Docs Manager.

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4. Double click to edit any form, and from here you can add or remove fields, create new groups, enter consent fields and add a signature point.

For more information on how to design a form, please refer to the [ClinicOffice User Guide](#). This can also be accessed via ClinicOffice's **Help** menu.

- Once you have finished designing the form, click the **Preview Online** button. This will generate the form on the E-Docs service and will open your internet browser with a preview (like the example below). You **MUST** do this preview before you can proceed to step 6.

**E-Docs**

**New Patient Form**

**History of Present Illness**

Date symptoms began: 17/07/2020

Have you experienced similar symptoms before? No

If Yes, when? If Yes, when?

Please rate your current pain (0 No Pain - 10 Worst Pain)

What makes this pain worse? What makes this pain worse?

What makes this pain better? What makes this pain better?

Have you seen any other health care providers for No

✓ Finish

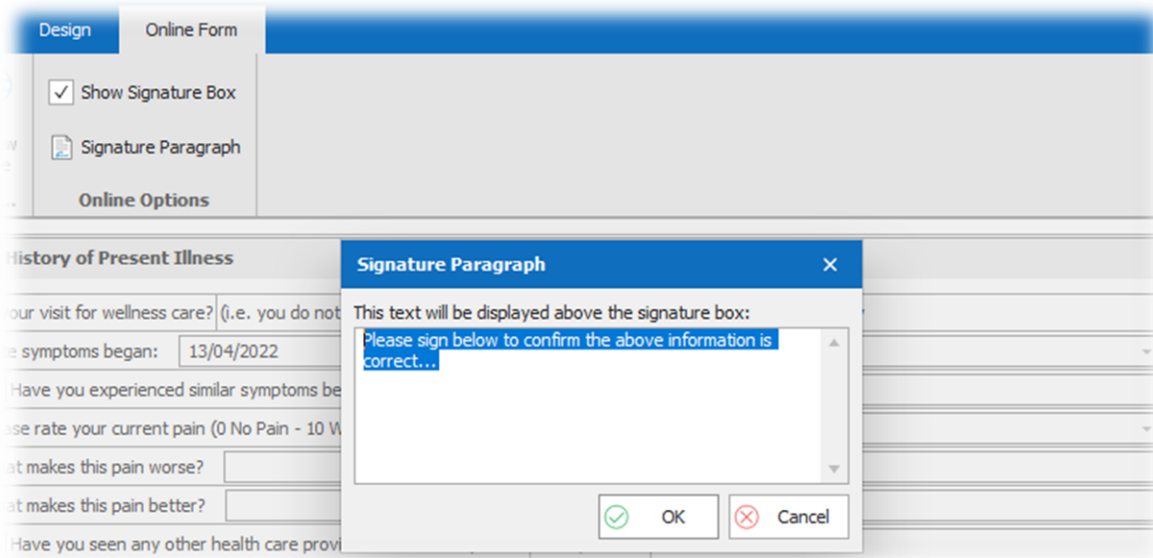
This will at least give you an idea of how it will look online and this will also be what the patient sees.

**NOTE:** The online form will not be able to mimic some formats. For example, a form might have two or more fields on the same line but when the form appears online, these fields will appear in a linear style. Another thing to note is that checkboxes will appear as Yes/No slider in the case of a two-state checkbox, and in the case of a three-state it will appear a Yes/No drop-down menu.

- The form is now ready to be used with the E-Doc service. To do this, you will need to access the E-Docs Manager which is discussed in [Section C](#) of this User Guide.

## Q. Can a form be setup to request the patient for a signature?

A form can be configured to accept a signature. This can be done by ticking the checkbox “**Online**” on the Form Manager window. From there go to design the form and tick the checkbox, “**Show Signature Box**”. You can customise the text that is presented to the patient before they complete their signature

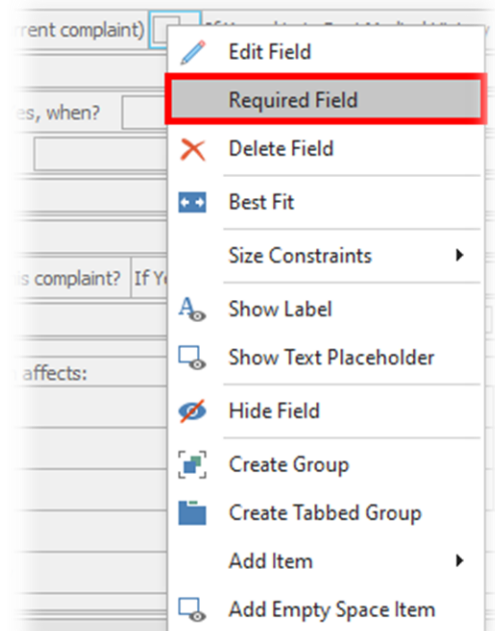


by clicking the **Signature Paragraph** button (see example below).

## Q. Can a field be made mandatory?

Yes, you can make a field mandatory. To do this, while in the form designer, you can right-click on a field and select “**Required Field**”. Alternatively, when you are adding a new field there will be a “**Required field**” checkbox that you can select.

You will know if a field is required because its text will be in **RED** with a small asterisk \* symbol next to the text. The text will also appear in red when the form appears online as well. If the patient does not fill the field in, they will be prompted to once they click to finalise their form submission.



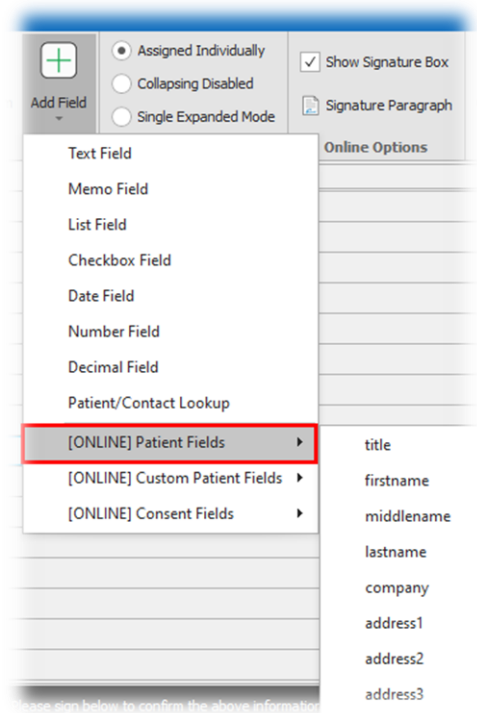
## Q. Can E-Docs be used to update live patient contact information?

Yes, you can use E-Docs to allow patients to check/update personal and contact details. To do this, while in the form designer, click on the “**Add Field**” button and go to **[ONLINE] Patient Fields**. Any default fields that you see within a patient record (such as “name” “address” “phone”) will appear in this list.

Add the field that you want a patient to be able to modify. You will know if a field is linked to a patient record because the label will be **BLUE**.

You can also make any of these fields mandatory as shown above so that they will show in red to the patient & stand out. (The blue label colour does not appear on the patient version of a form.)

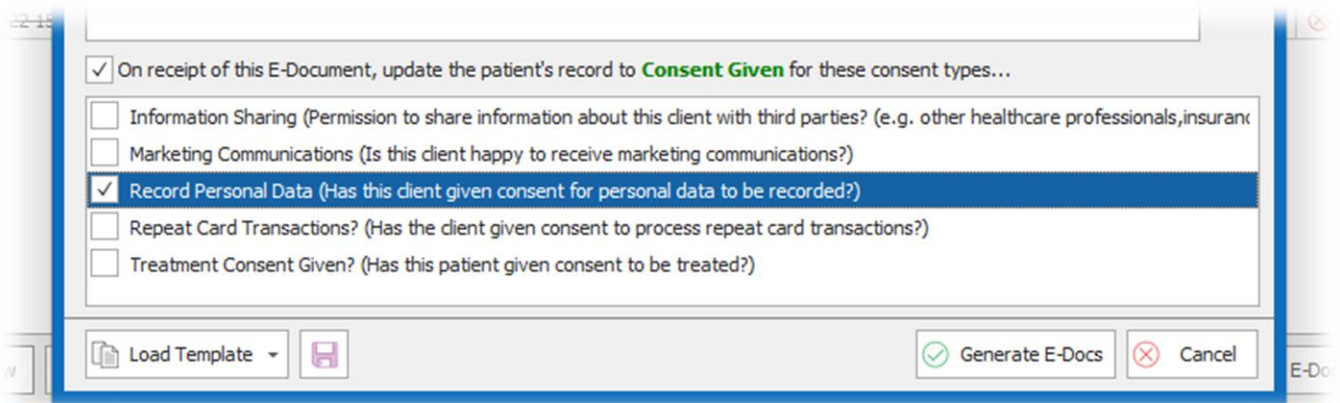
If the form is opened by a patient that already has some or all the information filled in, then when they open the form, they will see the information currently on record (for example their address). If they are happy with it, they can leave it, otherwise they can just type over the top of the current values.



## Q. Can E-Docs be used to update consents?

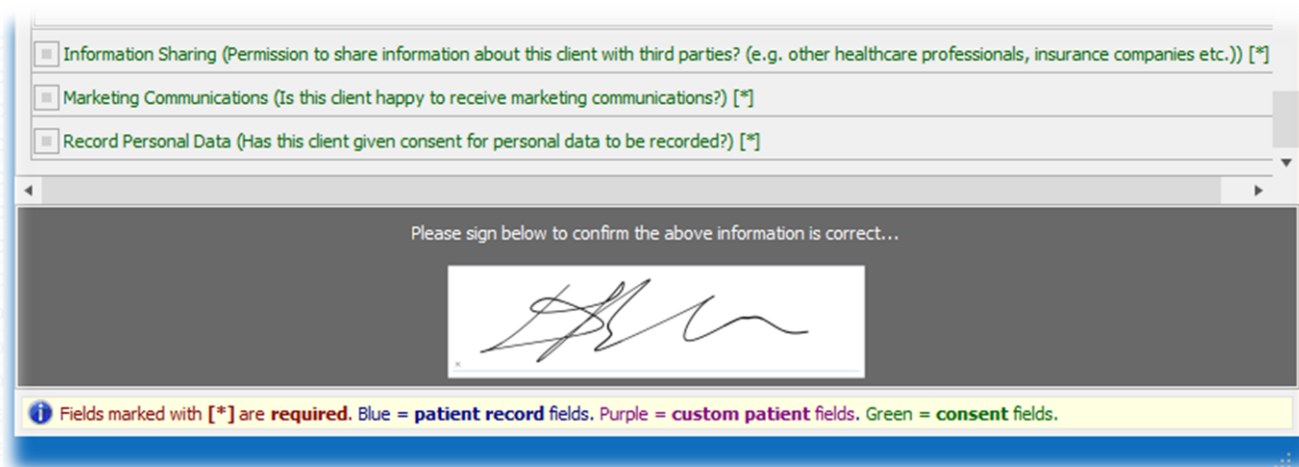
Yes, and there are two ways that you can address consent using E-Docs.

1. The first is when you generate a new E-Doc, to send to a patient, you will see a checkbox at the bottom of the window marked “On receipt of this E-Document, update the patient’s record to **Consent Given** for these consent types..” This will allow you to specify that once this form, letter or document template group has been completed then automatically mark a consent or consents as being given by the patient. Simply select which one is applicable for this form, document or templated group.



This first option is only recommended if the main aim of sending out the document or form is to receive a single consent. The reason is that with this option a patient cannot submit the form unless they do sign to the consent. If you would prefer a more flexible way of receiving consent then please look at the second option below.

2. The second option is to allow patients the option of accepting or declining consents while still completing and submitting the form, you can add individual consent fields directly to your form. To do this go to the Form Manager and open the form in design mode. Click the **Add Field** button, go to **[ONLINE] Consent Fields** and select the consent you wish to add. You can insert more than one consent on a form. When inserted the consents fields will appear with **green text** (see below). Note you change how the name of the consent appears on the form like any other field by right-clicking on them and selecting **'Rename'**.

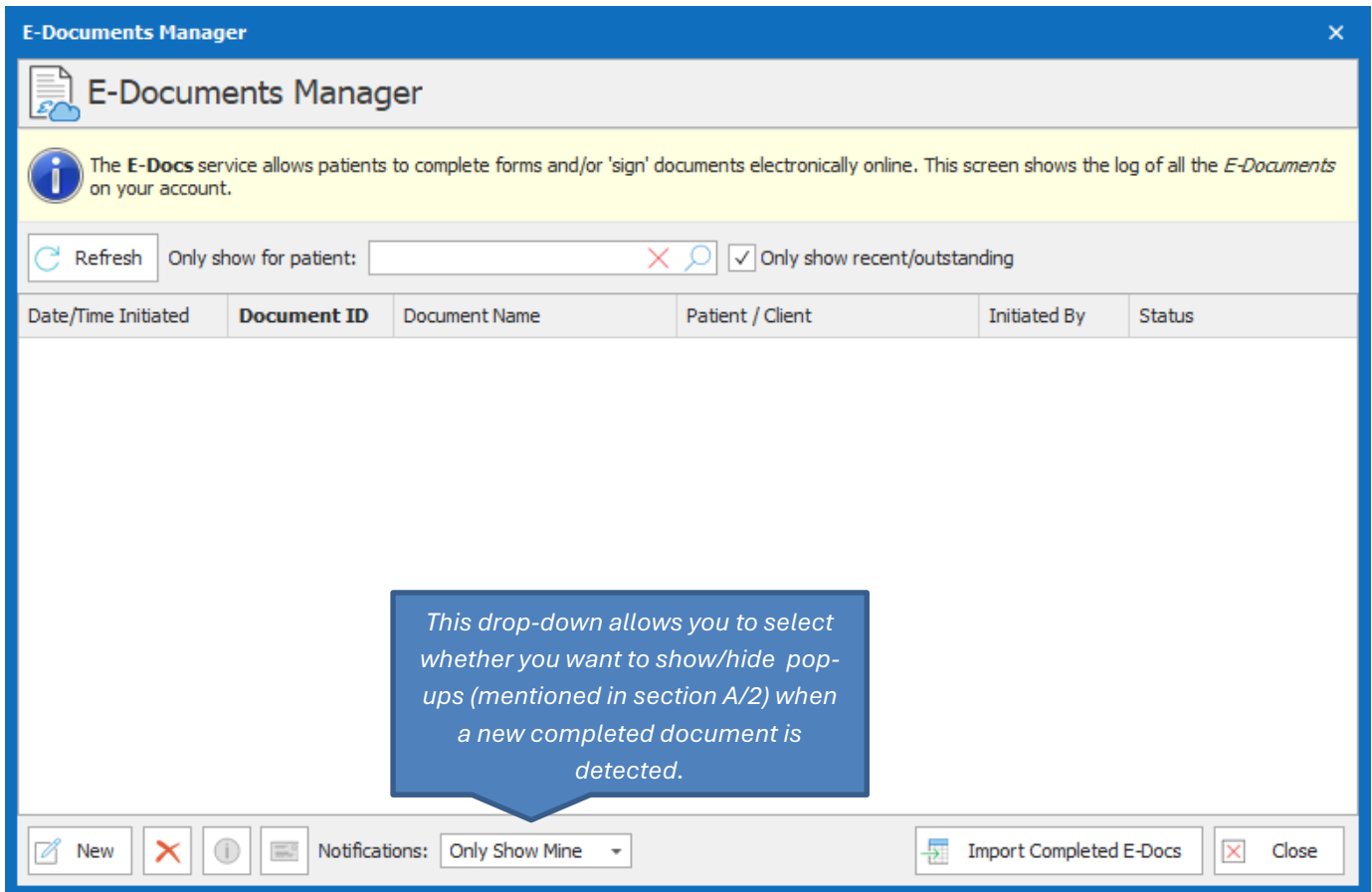


If you add a consent field to a form, then you must have the **'Show Signature Box'** enable for this to work. When the form is then sent to the patient, they must either confirm or deny their consent and then provide a signature before the form can be submitted and returned.

# [SECTION C] – USING THE E-DOCS MANAGER

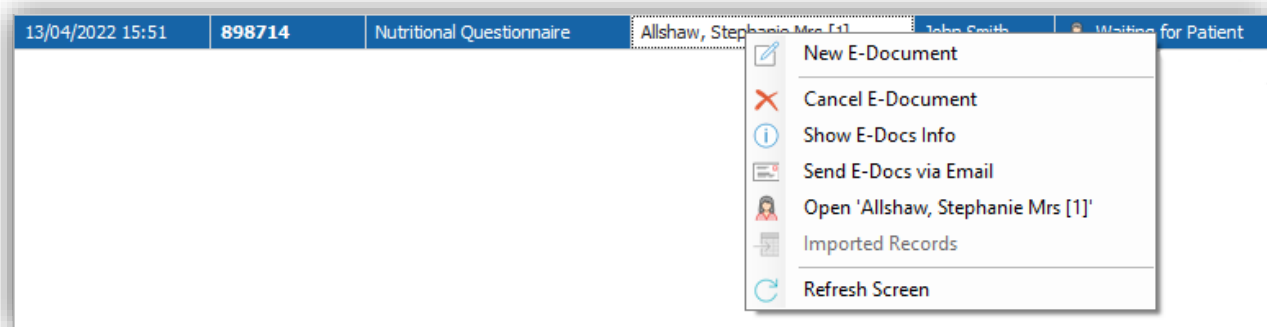
## [1] E-Docs Manager Basics

To access the E-Docs Manager, click on the drop-down arrow under the main Patients button in ClinicOffice, and select 'E-Docs Manager'. You will now see the window below open up.



This screen gives you an overview of all pending documents. The status of the document will be shown here. It will be either waiting to be filled in by the patient or waiting to imported back into ClinicOffice.

**Right-clicking** on any document from this screen will reveal a list of options, such as re-sending via email, cancelling or showing further document information.



This screen will also show who initiated a document, the name of the patient and the name of the document that has been issued.

Clicking on 'New' will take you to the E-Docs generator screen.

## [2] Generating E-Documents

There are multiple ways that you can access this screen.

- A. One way is as above, through the E-Docs Manager
- B. You can also access it via the E-Docs menu from any patient or appointment record if you want to run a letter with a signature point
- C. Right-clicking on any appointment in the diary

The latter 2 options simply bypass the need to select the document or patient.

**Generate E-Documents**

This screen allows you to upload forms/letters to the **E-Docs** service for patients to complete and sign online.

**E-Document Name** (or pack name):  **Generate E-Document for patient:**

Include these forms / letter templates:

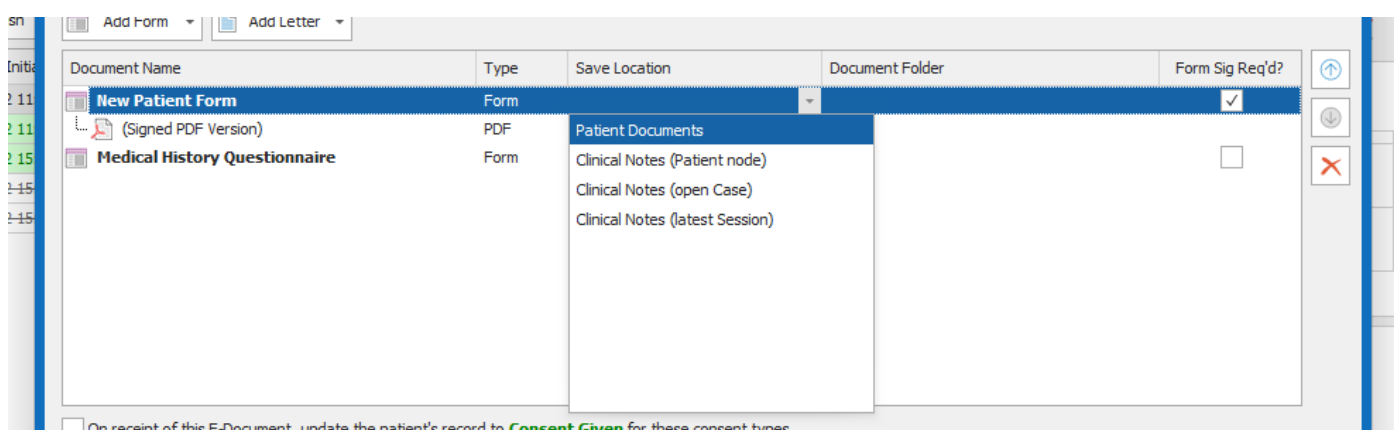
Document Name	Type	Save Location	Document Folder	Form Sig Req'd?
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On receipt of this E-Document, update the patient's record to **Consent Given** for these consent types...

Any forms that have been selected for online use from the Form Manager or letters with signature points will appear in either of the drop-downs above.

**Load Pack** allows you to create a pack for a group of forms and documents so as to send them out as one. This is useful if you frequently have to send a specific set of documents to your patients. For example, maybe you need to send out a welcome pack. To create your own document group, simply add your list of forms/letters to the generator, and then click the **'Save'** icon. Give your Pack a name, and then in future, simply click **'Load Pack'**, select your template group, and your document pack will be loaded in ready to be sent to the patient. The nice thing is that the Pack can also store information such as whether a signature is required, the save location and whether a patient consent is granted once this document group has been completed.

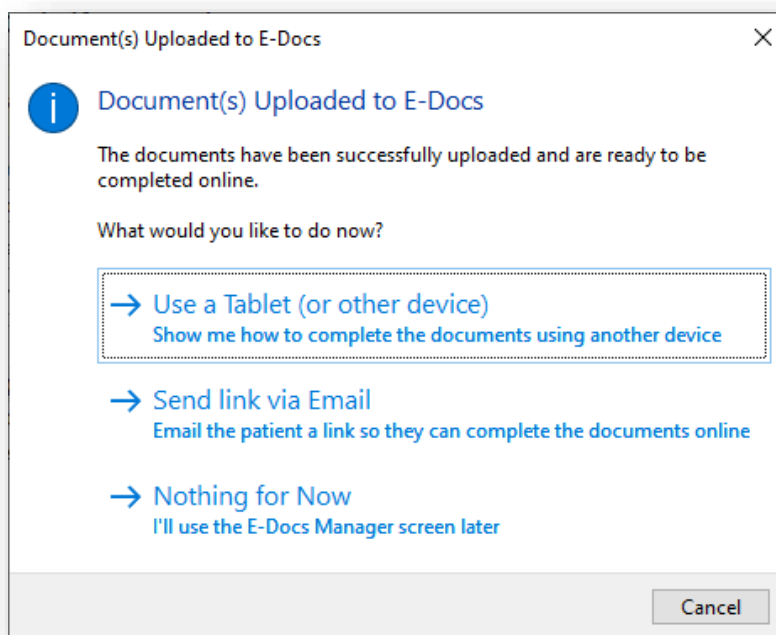
**Document Ordering** allows you to choose/re-order the documents as they will be presented to the patient. When you add more than 1 document to the list, you will notice the arrows to the right side of the screen turn green (see image below). Use these arrows to change the order.



**Save Location** allows you to choose where the completed document will be saved. With forms, depending on whether you have selected an 'Admin' or a 'Clinical' form will depend on what is available here. An 'Admin' form can only be saved to the "Patients Documents" and a 'Clinical' form can only be saved to a "Clinical Notes" location. Letters can be saved in any of the mentioned locations.

**Form Signature Required** allows you to capture a signature relating to the form that the patient has just filled out. If ticked, ClinicOffice will then create an additional PDF version of the file with the signature of the patient. This is so that the document cannot be tampered with subsequently. You can also choose to save the PDF version in a different location from the form itself.

Once you are happy with everything, you can click '**Generate E-Docs**'. You will then be asked if you want to send the document via an email link, hand the patient a tablet there and then or just save it for later (see image below).



Once the patient has returned the document, you will see the completed status pop-up as mentioned in [Section A](#) of this guide, or you can go straight back to the E-Docs Manager window, and you will see it there (as below). You can then press the '**Import Completed E-Docs**' button, and the documents will save to the location that you specified when you generated the E-Docs. *(This cannot be changed once you have submitted a document to the patient. If you make a mistake, you must cancel it, and recreate the E-Document.)*

Date/Time Initiated	Document ID	Document Name	Patient / Client	Initiated By	Status
14/04/2022 11:25	918006	New Patient Form	Allshaw, Stephanie Mrs [1]	John Smith	Imported
14/04/2022 11:23	870052	Medical History Questionnaire	New E-Document	John Smith	Imported
13/04/2022 15:55	369349	Letter to Patient	Open 'Allshaw, Stephanie Mrs [1]'	John Smith	Imported
13/04/2022 15:51	898714	Nutritional-Questionnaire			Completed
13/04/2022 15:48	793978	Nutritional-Questionnaire			Completed

Context menu for the first row:

- New E-Document
- Open 'Allshaw, Stephanie Mrs [1]'
- Imported Records
- Refresh Screen

Context menu for the second row:

- New Patient Form
- New Patient Form

Once the document has been imported, you can view these records by right-clicking on the log, going to **Imported Records** and selecting the relevant form or PDF document (as shown above).



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