How to Use Electronic Signatures in DXS

SystmOne

A guide on how you can use the electronic signature functionality to sign referral forms

Content

1. Introduction

This Electronic Signature functionality allows users to sign referral forms electronically without the need to print, sign and scan the forms before sending them to the service provider. The user only has to set up the electronic signature once in DXS where after it can be used in any form which has a signature field.

If you cannot see this functionality, please contact your CCG to raise this with DXS. Alternatively you can contact our support service desk using the details supplied on page 5.

2. Using the Electronic Signature

1. Navigate to a document with a signature field.
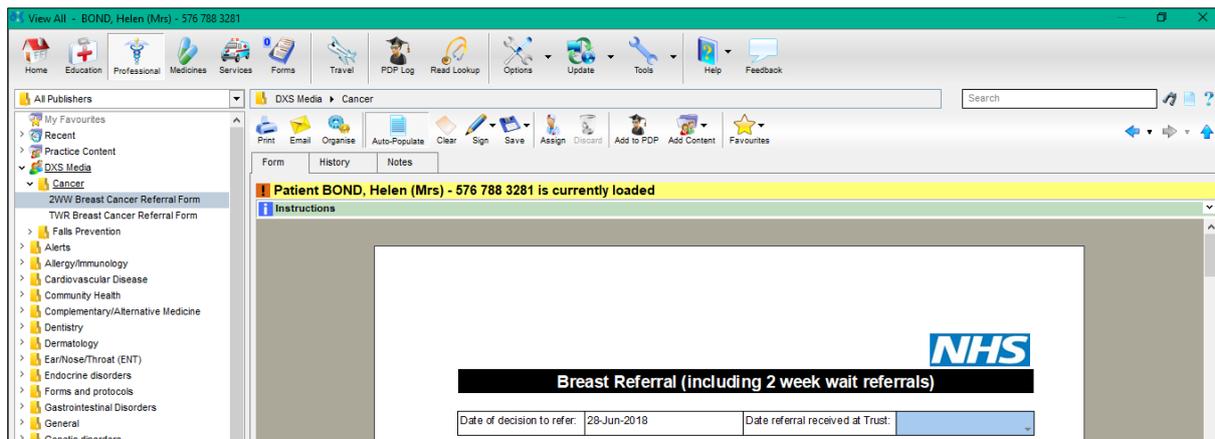
Figure 1: Document with a Signature Field

2. At the top of the screen, there will be a toolbar. Located on this toolbar is a "Sign" button. The sign button will display a drop-down menu when clicked. Click on "Sign" to add the signature to the form.
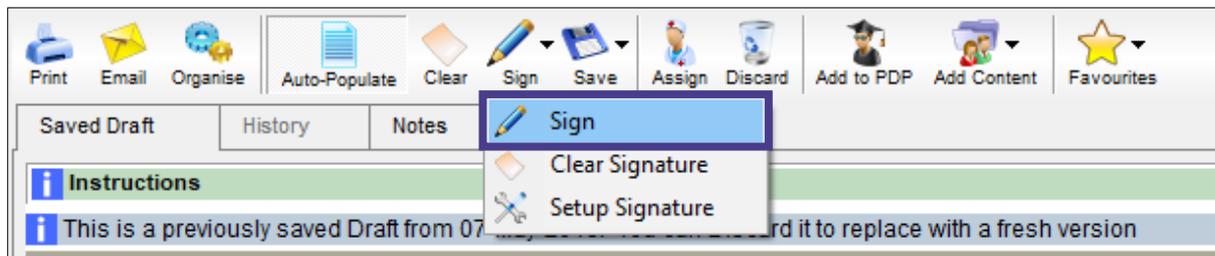
Figure 2: The "Sign" Button on the Drop-down Menu

3. If the signature has already been set up for the user, it will populate in the signature field.

Figure 3: Document Populated with the Electronic Signature

3. Setting up the Electronic Signature

If the user has not set up their signature, they will be prompted to do so through the "Preferences" dialogue box.
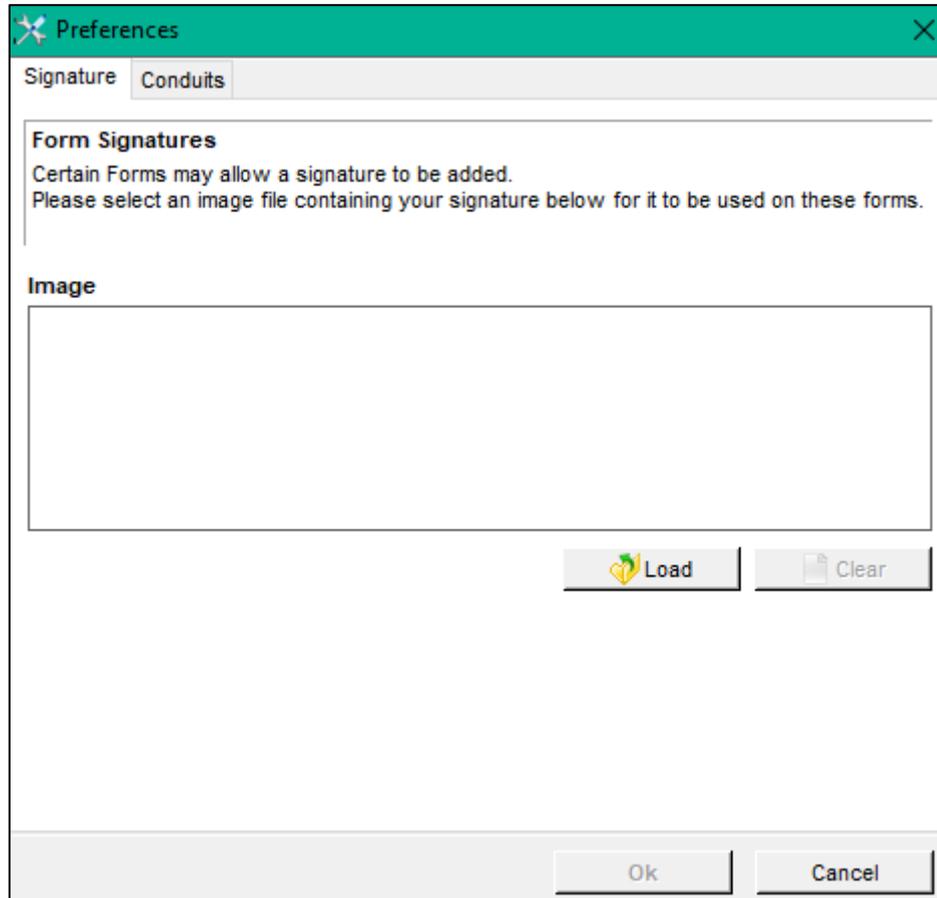
Figure 4: Setting up an Electronic Signature

The user can also select the "Setup Signature" option on the drop-down menu which will also display a "Preferences" screen.
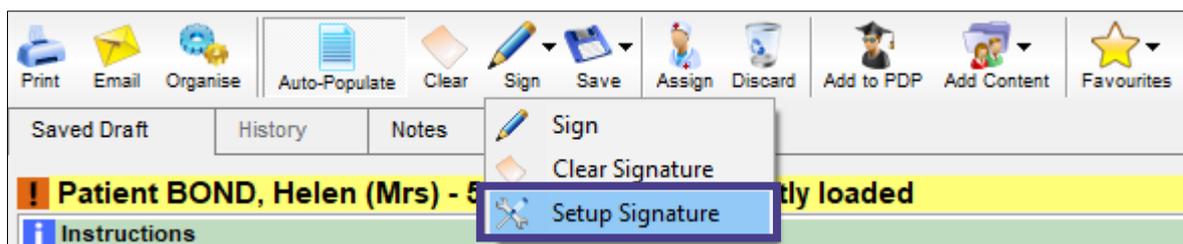
Figure 5: The "Setup Signature" Button on the Drop-down Menu
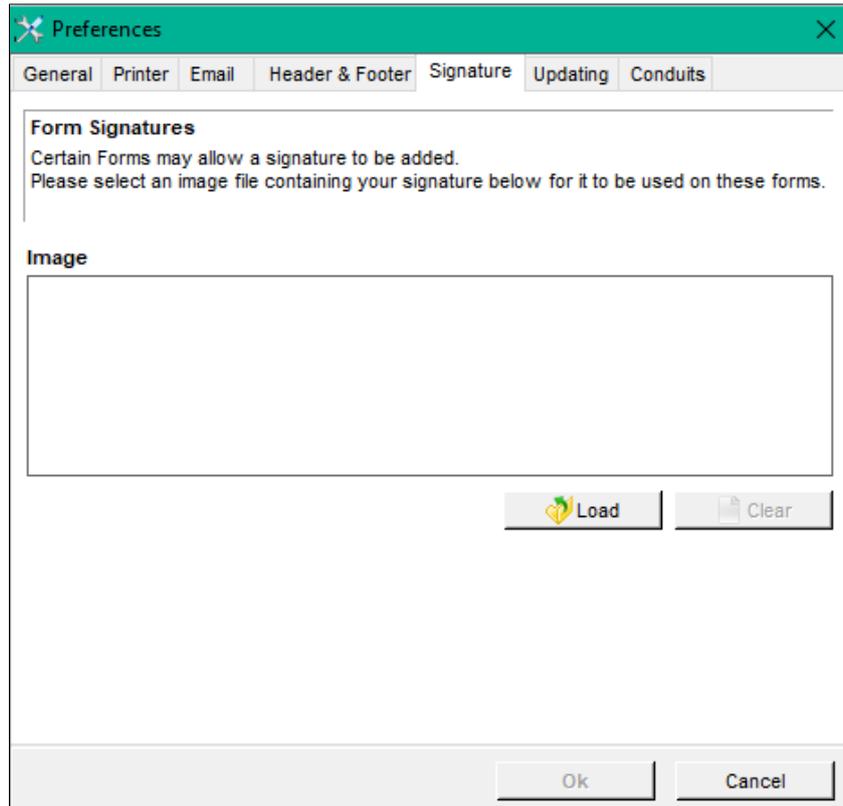
Figure 6: Setting up an Electronic Signature

1. From here, they can click "Load" to upload their signature file.
2. This will open an explorer dialogue box. Browse to the signature file location.

   NB: The "Files of type" box displays "Signature Files", including .jpeg, .bmp, .png or .gif – the explorer window should **ONLY** display these files.
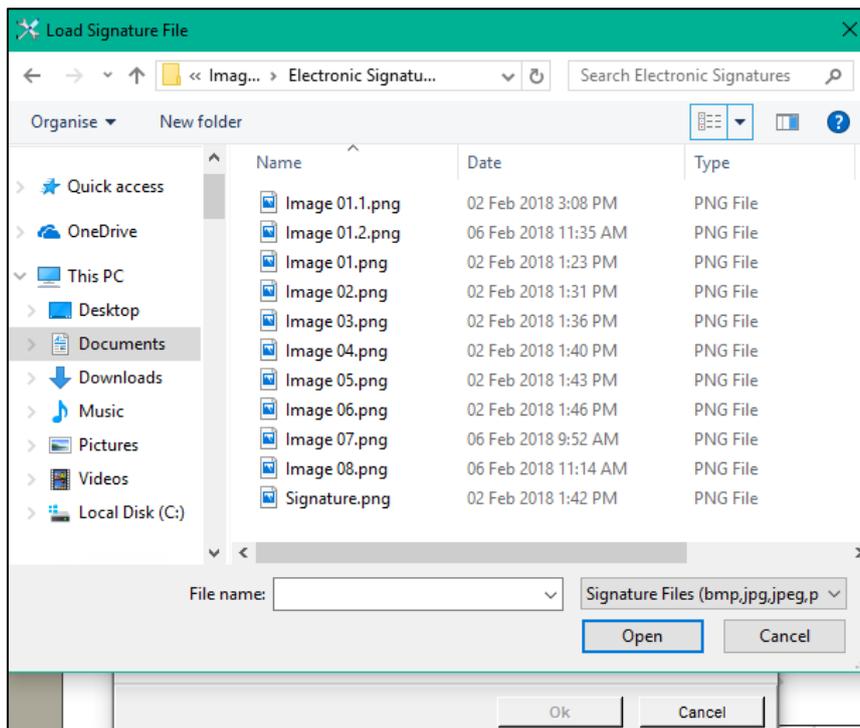
Figure 7: The Explorer Dialogue Box

When saving and selecting your signature file, please be aware of the file size, in terms of both MB/GB file size and pixels.

- File size may cause problems with sending as it could cause the file size of emails or attachments to be too large. This could be attributed to a number of factors including what image file and quality you have saved your file as. Your IT providers or helpdesk should be able to advise you on how to reduce the size.
- Actual pixel size may cause problems with the display on referral forms, especially when printing or emailing. You should be able to crop the image in any basic editor to make it smaller. Your IT providers or helpdesk should be able to advise you on how to reduce the size.

3. The relevant file should then be selected, and "Open" clicked.
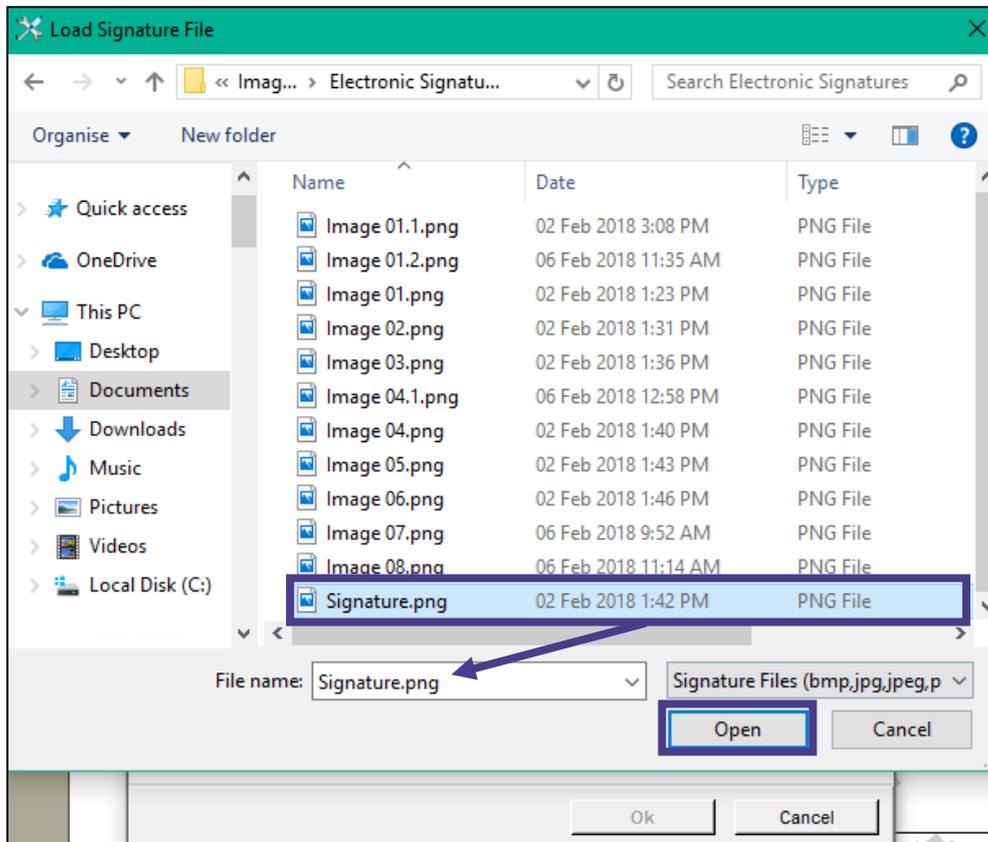
Figure 8: Selecting the Signature Image

4. This will populate the "Image" viewing window within the "Preferences" dialogue box with the selected signature image.

Figure 9: Uploading a Signature

5. Click "OK" on the "Preferences" dialogue box.
6. This will then automatically populate the signature field with the selected signature file. This will be added automatically every time "Sign" is clicked, unless the settings are changed within "Preferences".

   NB: if the user would like to change these settings, they can change the settings from the sign drop-down menu or through the overall Options > Preferences menu.
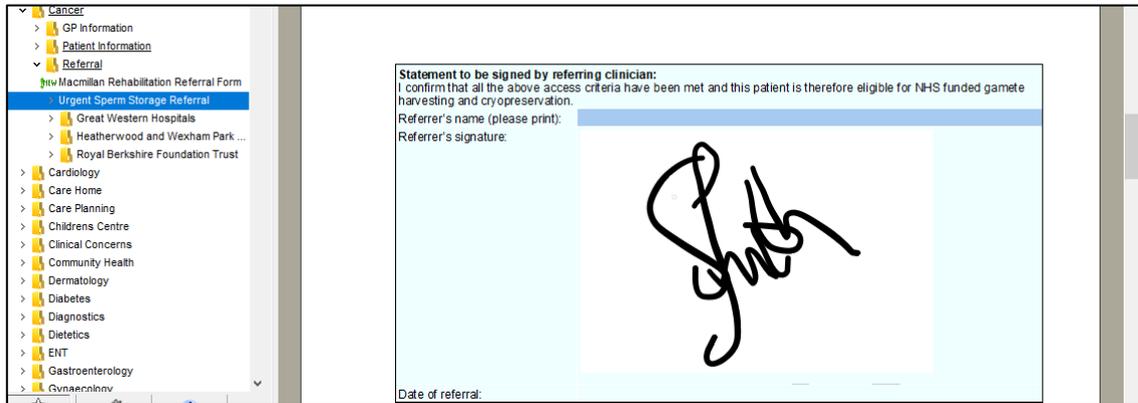
Figure 10: The Populated Signature within the Document

7. The document can be printed, saved or emailed from here following the usual processes.

4. DXS Support

4.1　Problems?

If you are having any problems with using the electronic signature or experiencing any technical issues with DXS Point-of-Care, please get in touch with our service desk and one of the members of our team will be more than happy to help you.

✉　**support-uk@dxs-systems.com**
☎　**0800 028 0004** option 1

4.2　Service desk hours of operation

Monday–Friday	07:30–19:00
Saturday	09:00–13:00
Sunday	Closed

4.3　DXS Training

To view more DXS Training Guides visit our training website at http://training.dxs-systems.com/.