

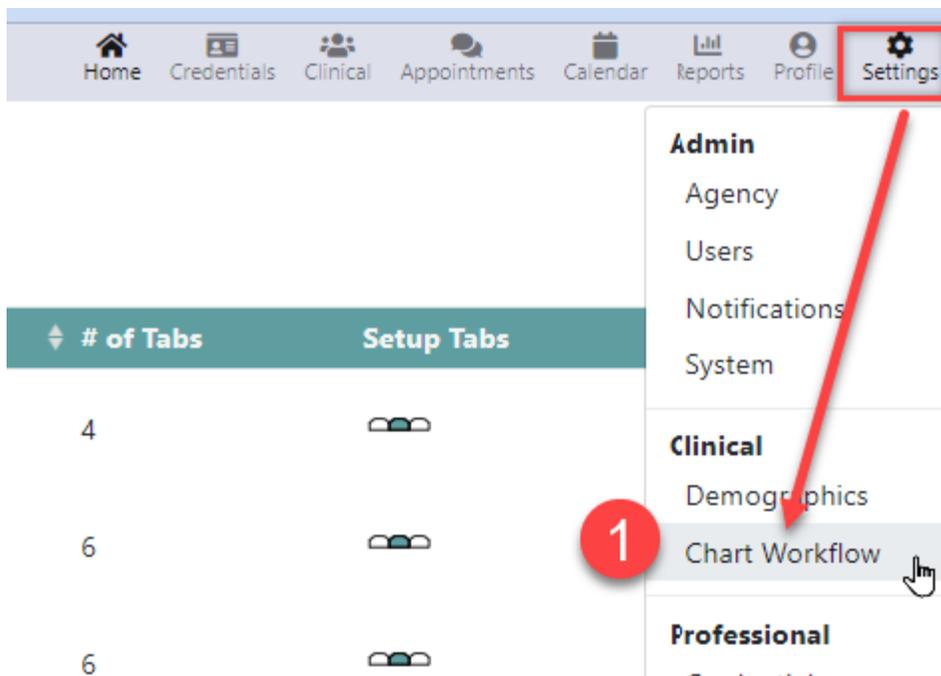
OakTree Practice Management: Setting up Signatures for Clinical Forms

When you set up signatures on a form you will be able to control whose signature is optional or required. Also, you will be able to lock the form once all required signatures have been captured.

IMPORTANT NOTE: *If you do not set up a signature for a form, there will not be a signature block that appears on the form. Therefore, if you want the signature block(s) to appear on the form, you will need to go into the Chart Workflow setup as described below.*

Step 1 – Go To Settings

To start go to Settings and select the Chart Workflow link



Step 2 – Find the Chart Workflow

Find the Chart Workflow that has the forms you wish to set up signatures for then click the corresponding Setup Tab Icon

Chart Workflow Setup

[+ Create New Chart Workflow](#)

Chart Workflow Name	Job Title	# of Tabs	Setup Tabs	Actions
Peer Supervisor	Peer Recovery Supervisor	4		
Tribal Tech	Test Coordinator - Tribal Tech	6		

A red arrow points to the 'Setup Tabs' column header. A red circle with the number '2' is placed over the 'Setup Tab Icon' for the 'Tribal Tech' row, which is also highlighted with a red box.

Step 3 – Select Tab Maintenance: Forms

Under the Tab Maintenance column, select the Forms you wish to see and set up signatures

Chart Workflow Setup

Workflow for Chart Tribal Tech for Job title Test Coordinator - Tribal Tech

[Add New Tab](#) [Save Tribal Tech](#) [Back to Chart List](#)

Order	Tab Name	Tab Maintenance	Actions
1	Demographics	Forms Widgets	
2	Registration	Forms Widgets	
3	Clinical	Forms Widgets	
4	Screening	Forms Widgets	
5	Comments	Forms Widgets	
6	Client Communications	Forms Widgets	

Step 4 – Select Signatures for Forms

Select an active form for this Tab (they will already have a blue checked box) and click the [Signatures] button

Assign Forms

Workflow for Chart Tribal Tech for Job title Test Coordinator - Tribal Tech

Tab Clinical

[Save Clinical](#) [Back to Tabs List](#)

Selected	Form Name	Form Description	Signatures	Required
<input type="checkbox"/>	ACE	Adverse Childhood Experience Questionnaire	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	ASI	Addiction Severity Index	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	CATS	Child and Adolescent Trauma Screen	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	COMMENTS	Comments	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input checked="" type="checkbox"/>	COMMUNICATION-NOTE	Communication Note	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	CRAFFTADULT	CRAFFT Screening Interview	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="checkbox"/>	CRAFFTCHILD	CRAFFT Screening Tool for Adolescent Substance Abuse	Signatures	<input type="radio"/> Yes <input checked="" type="radio"/> No

Step 5 – Select Each Signer and Set Signature Status

When you open this Form Signature dialog you are setting the signature rules for the selected form as selected in step 4.

Form Signatures Dialog box breakdown:

- You have the choice to add up to 5 signature lines to the select form
- Under Signer, you are given a drop-down list of signers to select from for each line
- Each select signer can be set to have their signature optional or required. The signature can also be set to lock the form from being edited once it has been signed by the selected signer.
- Click [Save] to save your changes

The screenshot shows the 'Form Signatures' dialog box with a table and control elements. Callout 'a' points to the 5 signature lines. Callout 'b' points to the 'Signer' column. Callout 'c' points to the 'Signature Status' column. Callout 'd' points to the 'Save' and 'Cancel' buttons.

Signature Line	Signer	Signature Status
1	Primary Case Manager	<input type="radio"/> Optional <input checked="" type="radio"/> Required <input type="checkbox"/> Signature Locks Form
2	Support Primary Staff	<input type="radio"/> Optional <input checked="" type="radio"/> Required <input checked="" type="checkbox"/> Signature Locks Form
3	Support Secondary Staff	<input checked="" type="radio"/> Optional <input type="radio"/> Required <input type="checkbox"/> Signature Locks Form
4	-- None --	<input checked="" type="radio"/> Optional <input type="radio"/> Required <input type="checkbox"/> Signature Locks Form
5	-- None --	<input checked="" type="radio"/> Optional <input type="radio"/> Required <input type="checkbox"/> Signature Locks Form

Choose if the selected signature will be optional or required.
OPTIONAL: Choose which signature will lock the form from being edited

Save Cancel

REMINDER: To see signature blocks in the forms, you MUST select at least one Signature line and assign a Signer

Step 6 – Important Step

After you have made any changes by selecting a form or editing the **[Signature]** button, it is important to click the (1) Save button **before** clicking the (2) [Back to Tabs List] button to go back to the previous page. If this is not done your changes in Assigned Forms will not be saved.

OakTree PRACTICE MANAGEMENT

Assign Forms

**** **Important Step** ****
When you done adding or changing in Assign Forms
1) Click the Save button
2) Then click the Back to Tab List

1

2

Save Clinical

Back to Tabs List

Selected	Form Name	Form Description
<input type="checkbox"/>	ACE	Adverse Childhood Experience Questionnaire
<input type="checkbox"/>	ASI	Addiction Severity Index
<input type="checkbox"/>	COMMENTS	Comments
<input checked="" type="checkbox"/>	COMMUNICATION-NOTE	Communication Note
<input type="checkbox"/>	CRAFFTADULT	CRAFFT Screening Interview
<input type="checkbox"/>	CRAFFTCHILD	CRAFFT Screening Tool for Adolescent Substance Abuse

For more questions, user guides, and tutorials on OakTree, visit our 24-hour online [Help Center](#), call us at 800-324-7966 or email support@orionhealthcare.com