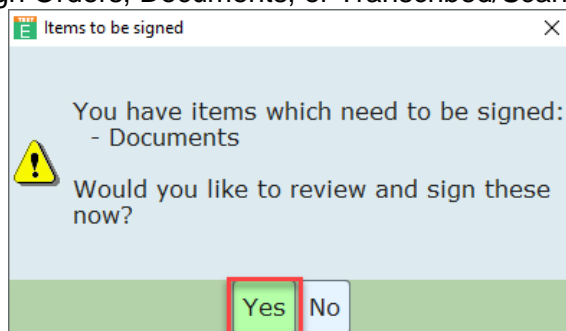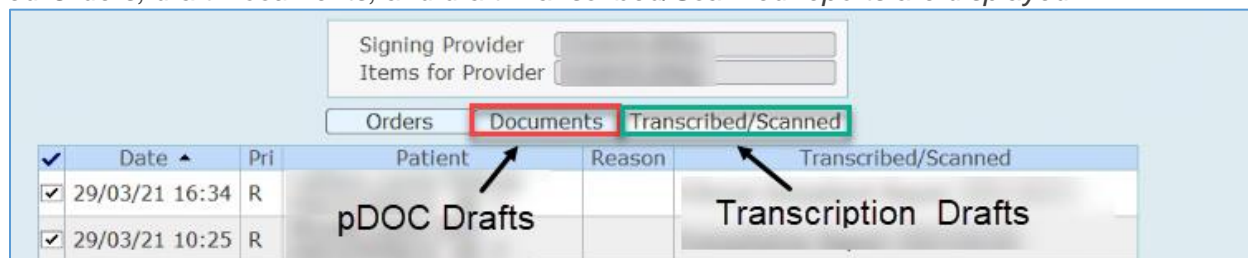# How to sign Draft pDOC or Transcription Reports

Log into MEDITECH using the appropriate role to enable Documentation.

When prompted to review and sign Orders, Documents, or Transcribed/Scanned reports, click **YES**.
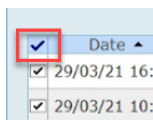

*Unsigned Orders, draft Documents, and draft Transcribed/Scanned reports are displayed.*

Signing Draft pDOC reports:

1. Click **Documents**

2. Uncheck the Select All arrow to individually select reports to preview.

3. If a report was saved in Draft status and is now ready to SIGN:
   - Choose report from list
   - Complete edits and finalize report
   - Insert the following statement at the top:
     - **"This is a LATE SIGN-OFF of a draft document. Please note original registration date/date of visit in report header."**
   - Click **SIGN**
   - Enter **PIN** and click **OK**

4. If document is blank/cut off and needs to be cancelled:
   - Note specific account number
   - Launch a second MEDITECH session, choose Documentation role
   - Click **No** on prompt
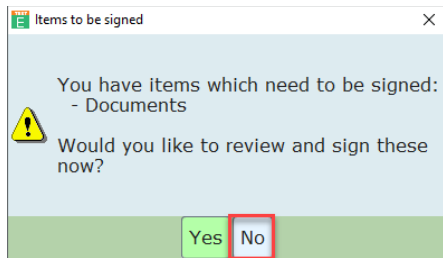
- o Click **Find Patient**
- o Enter specific account number
- o Open patient's chart
- o Choose appropriate account from listed visits
- o Click **Document**
- o Find Draft document in Document list
- o Click on the document to open
- o Click **Delete/Cancel Document**. This document is now removed from list of documents to sign.

5. If a document is in this list for the Reason "Co-sign":
   - o Providers may have been inadvertently named as a Co-Signer by being added in the "Assign Providers" field instead of the "Additional CCs" field

- o Choose report from list
- o Click **View & Sign**
- o Click **Edit Signers/CCs**
- o Select your name from the Assign Providers List
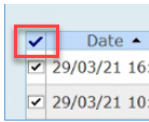- o Click **X**
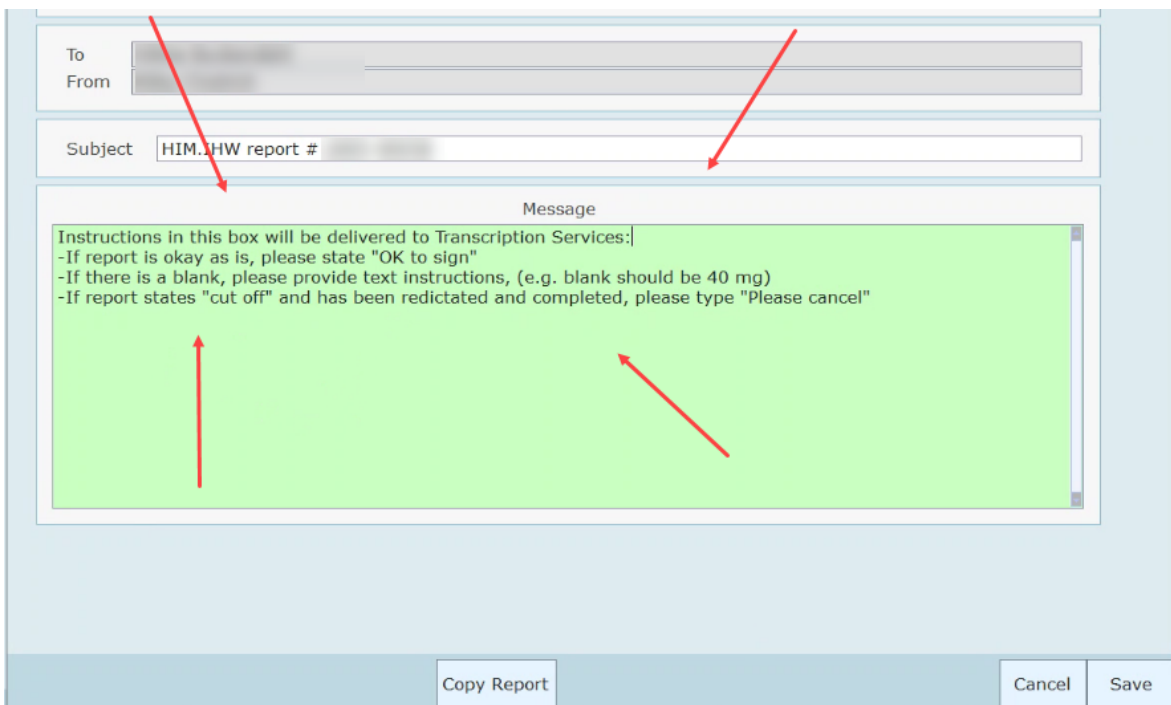- o Click **Save**

Signing Draft Transcription reports:

1. Click **Transcribed/Scanned**

2. Uncheck the Select All arrow and individually select report to preview.

3. Select a document

4. Click **View/Sign**

5. Click **Edit Document**
   - If the Draft document is available to edit
     - Remove draft statement at top of report "REPORT OUT FOR REVIEW…."
     - Make edits as appropriate, fill in blanks
     - Insert the following statement at the top:
       - **"This is a LATE SIGN-OFF of a draft document. Please note original registration date/date of visit in report header."**
     - Click **OK**

   - If the screen is blank and the document is <u>NOT</u> available to edit, the account is "expired" (older than April 2020)
     - Click **Cancel**
     - Review document, note any changes/blanks
     - Click **Send Message** (this delivers a message to Transcription Services who will update and Proxy sign the document)
     - Leave instructions for completion in the Message box (screenshot below)
     - Click **Save**