Manage and track document signing requests

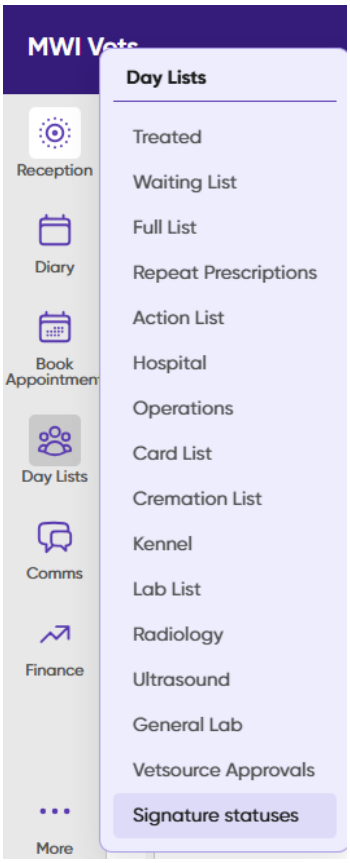
18/11/2026 4:50 pm GMT

Summary

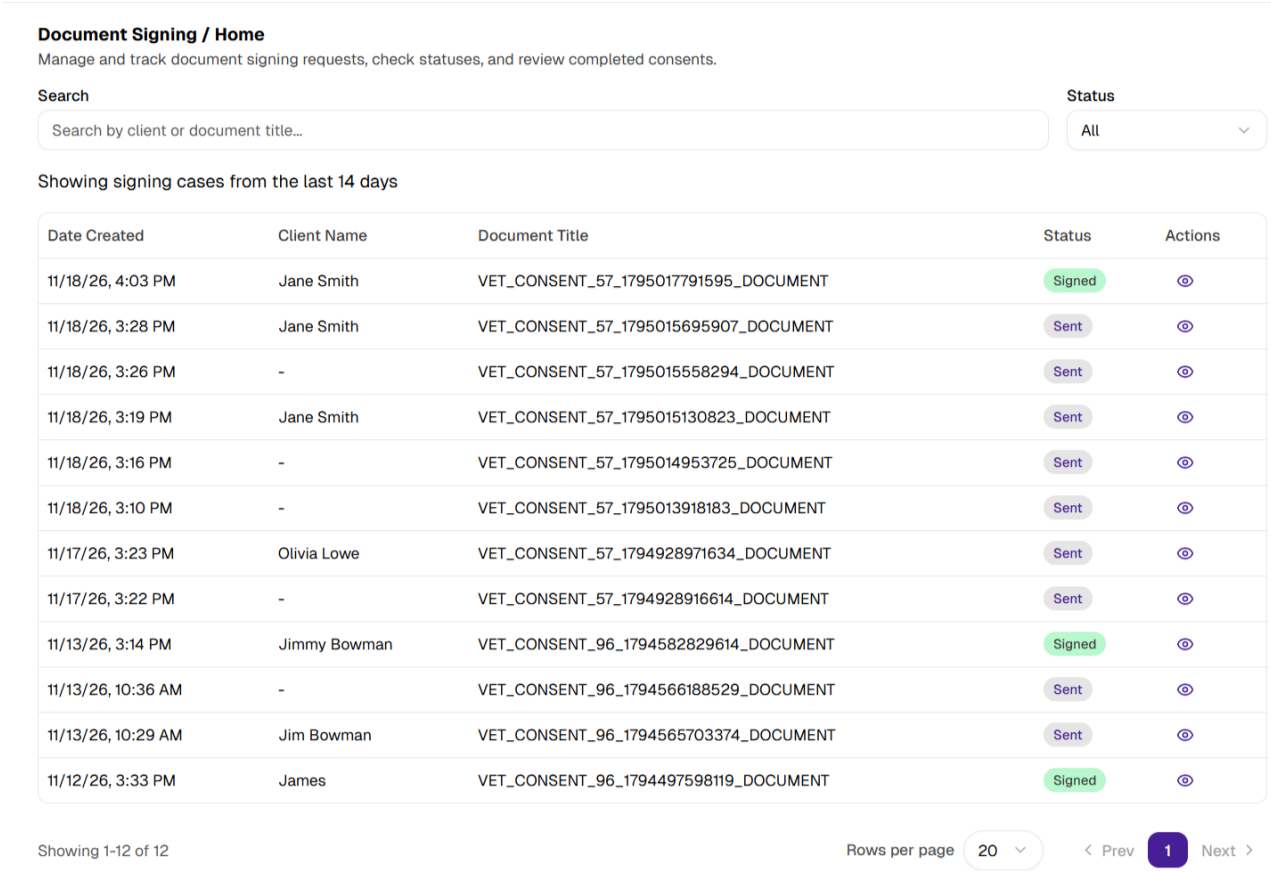
This page explains how to manage and track document signing requests.

Details

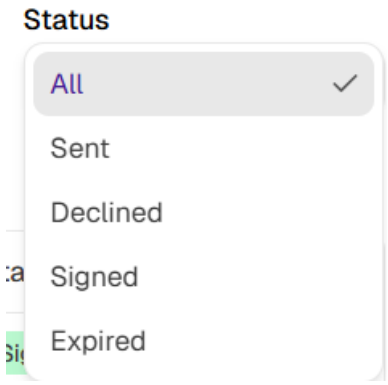
If you wish to look at an overview of documents that have been sent electronically, navigate to Day Lists via the Primary Navigation menu and select Signature Statuses:



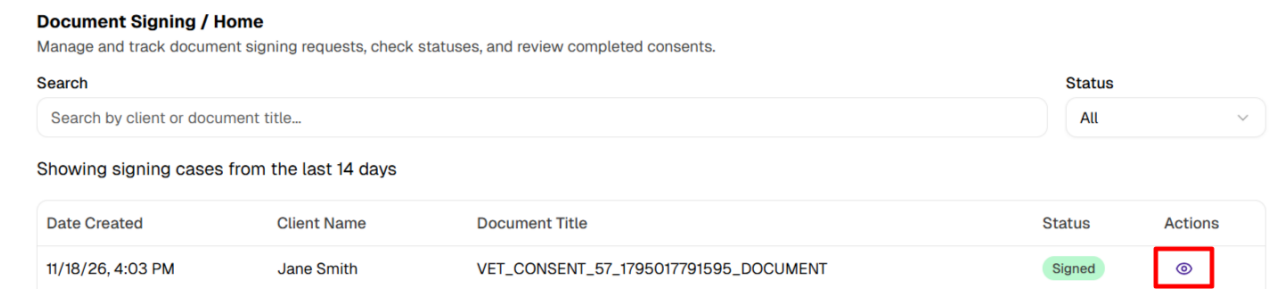
All activity from the past two weeks will display:



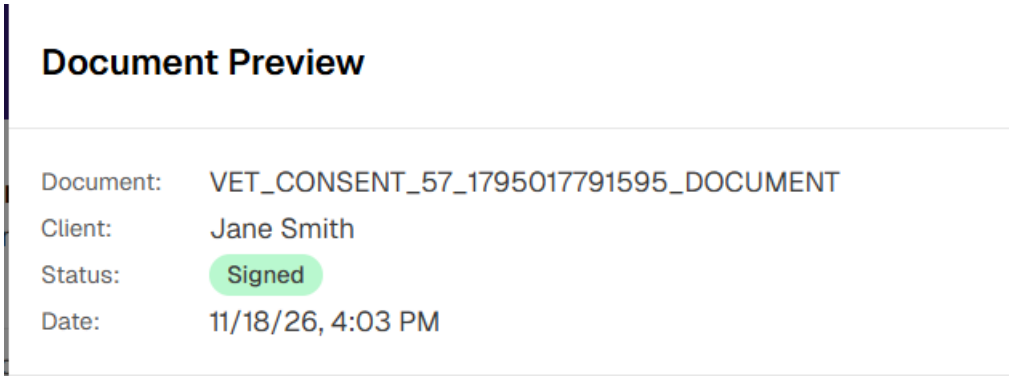
Note the Status drop-down to filter



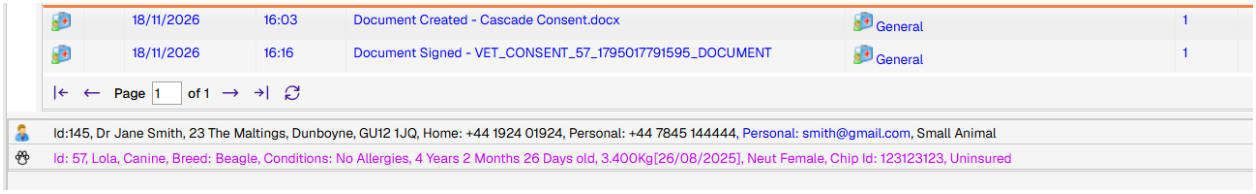
Clicking the eye icon will allow you to preview the document.



If the client has signed, this will show with the date and time they signed.



Documents that have been sent for signature will display in the patient History tab. If the client has signed, this will also show



These documents will also show in the patient Documents tab

