ENTRYPOINT TRAINING GUIDE

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1. Accessing EntryPoint
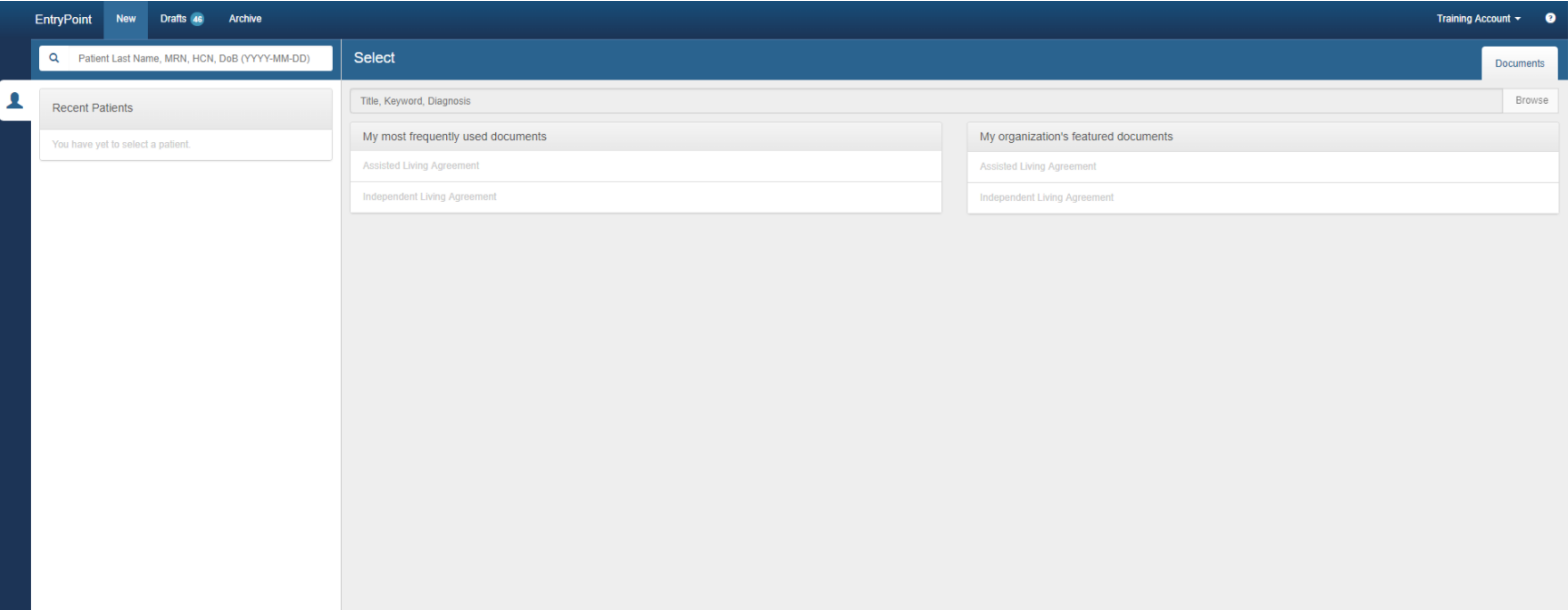
To Access EntryPoint, click the EntryPoint button via SavaCentral.

From there, select your site name to be logged into EntryPoint.

2. Drafts

To access the Drafts and Archive tabs, click on the respective buttons at the top left corner of the homepage:

2. Drafts

You can view and edit a document that you
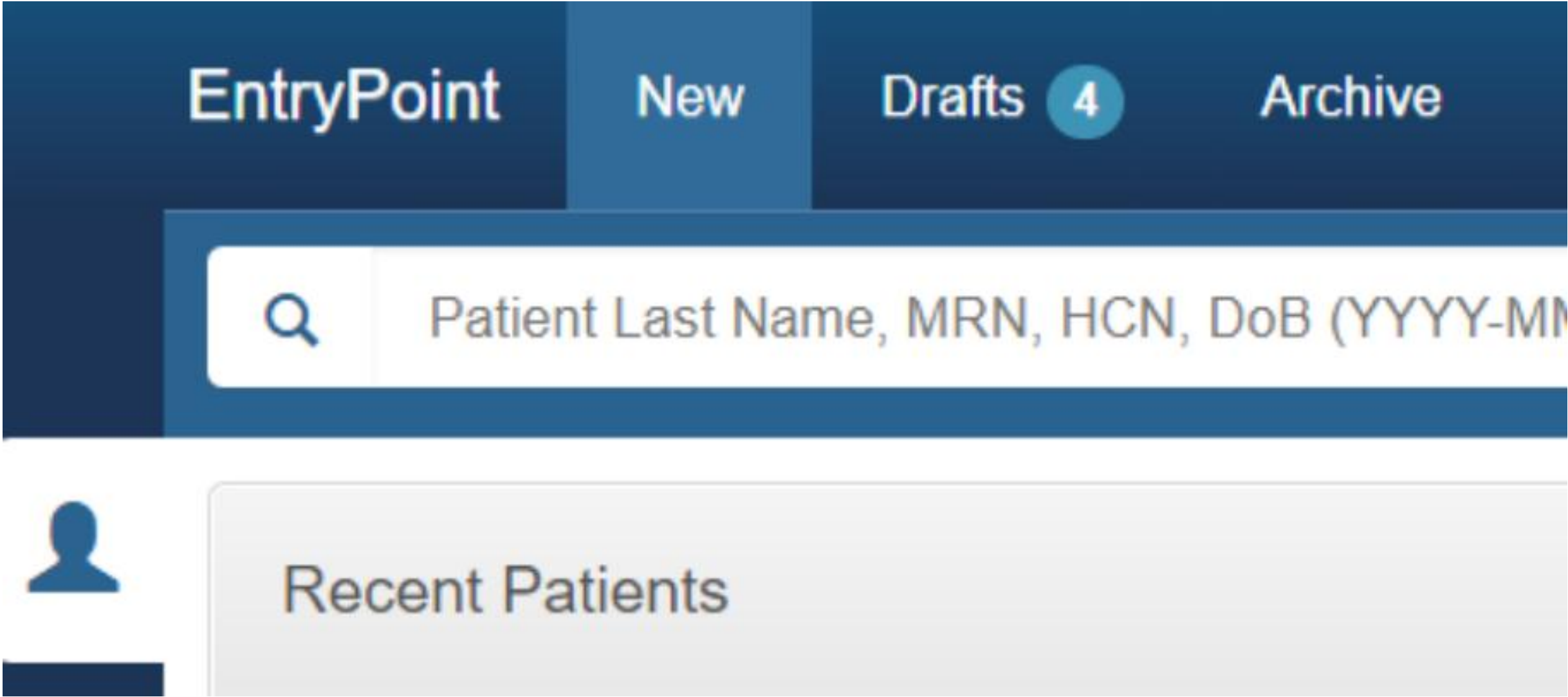
have saved as a draft in the Drafts tab.

Note: You will only be able to view and edit your own drafts.

The number of drafts that you currently have saved appears in the

badge beside Drafts at the top of the page. For example, if you

have four drafts saved, you will see the number "4" beside Drafts.

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2a. Editing Drafts

To view and edit a document that you have

saved as

a draft:

1. From the homepage, click Drafts.

2. Click the pencil icon beside the document

you want to edit.

3. You can now do the following:

✓ Edit the draft.

✓ Submit the draft.

3. Archive

The Archive tab allows you to view all the

Draft Documents

Patient ⇅	Document ⇅	Submitted By ⇅	Date & Time ⇅	
PATIENT, TEST (EPPATIENT154344114203)	Admission Agreement	Account, Training	2018-12-05 16:28	✎
PATIENT, TEST (EPPATIENT154344114203)	Admission Agreement	Account, Training	2018-12-05 15:30	✎

1 - 2 of 2 items

Training Account ▾

documents that you have submitted.

You can also view all the documents submitted by others in your EntryPoint by selecting the Everyone's Documents filter.

3a. Navigating Archive

The following filters on the left side of the page allow you to search for the document you want to view:

To view the full document, click View.

Patient's last name or date of birth (DOB)

EntryPoint   New   Drafts ②   Archive

Filters

Title of the document

The last name of the person

who submitted the

document Signed status of

the document

Date or date range in which
                            the
                            document
                            was
                            submitted

My Documents   ● Everyones Documents

Patient Last Name, MRN, HCN, DoB (YYYY-MM-DD)

Title, Keyword, Diagnosis   Browse

Submitted By (Last Name)

Signed Status   All   ▼

From: Select a Date

To: Select a Date

Reset

Training Account ▾   ❓

Status	Signing	
Submitted	✅ Signed	View

1 - 1 of 1 items

4. Selecting a

patient

You can select a patient in either of the following ways:

1. Type in the patient's last name or date of birth (DOB) in the search bar.

OR

2. Select a patient from the "Recent Patients" list on the left of the home page.

This is a list of patients for whom you have recently submitted a document.

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5. Selecting a document
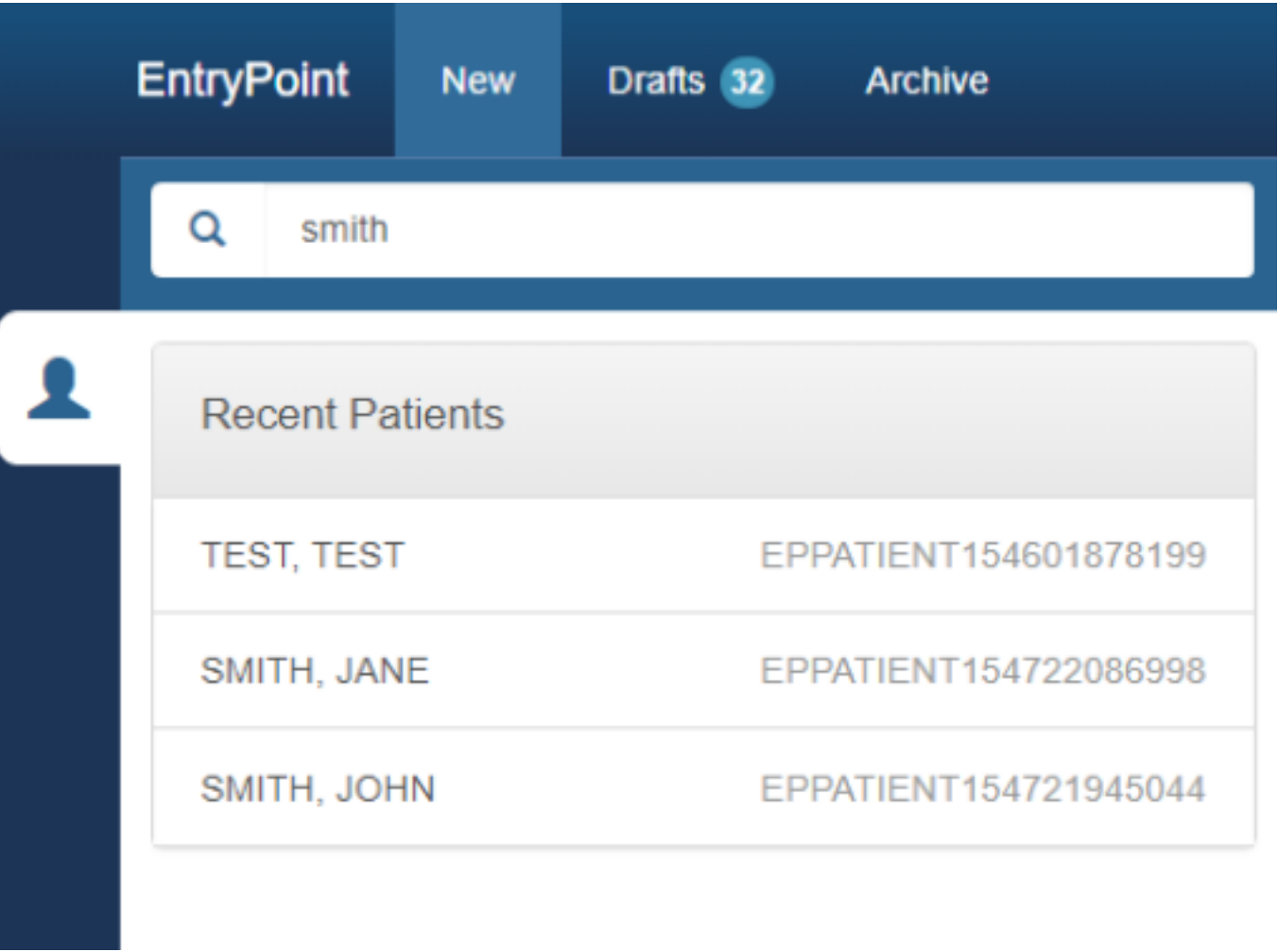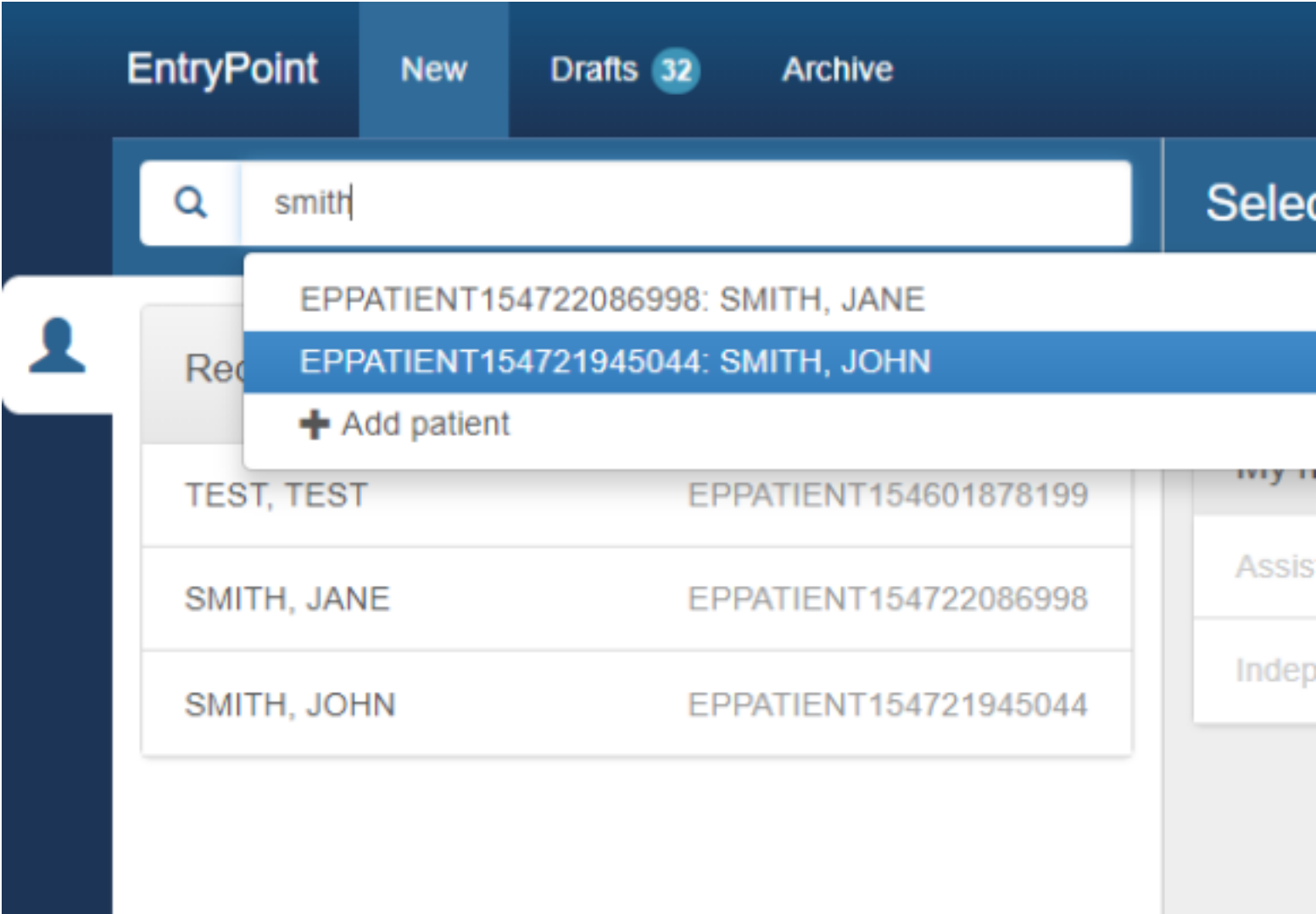
To select a document, you can do <u>any</u> of the

Browse

following:

1. Search for a document.

2. Select a document from the "Most

   Frequently Used" List.

3. Select a document from the "My

   Organization's Featured Documents"

   list.

4. Browse for a document.
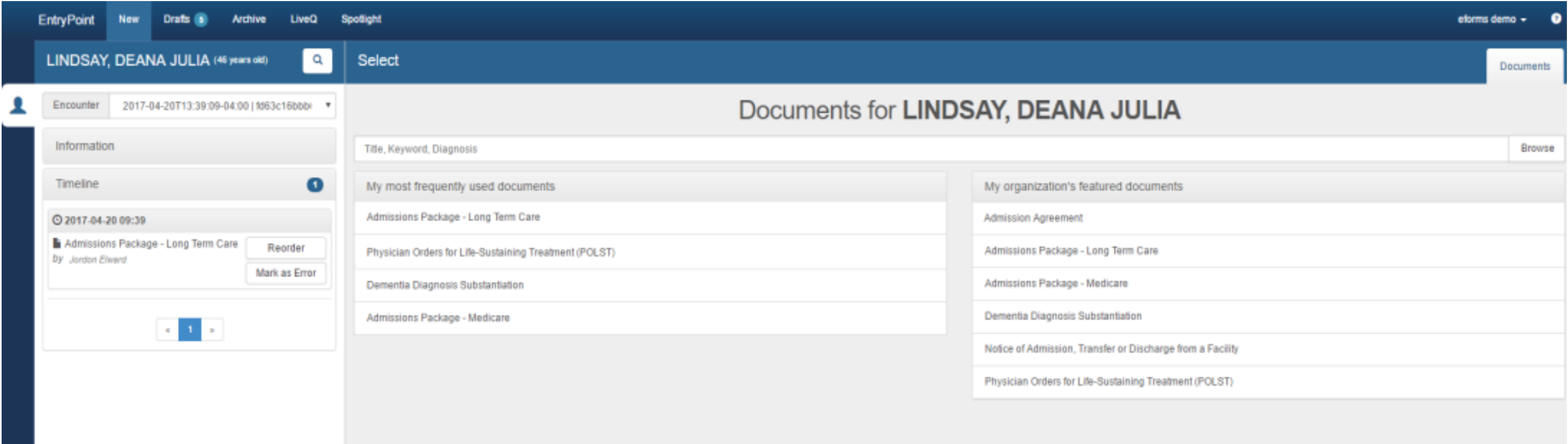
My most
frequently used
documents

My organization's
featured documents

6. Completing a document

To enter information into a document:

✓ Enter text into the text fields, as required.

✓ Select the applicable check boxes and radio buttons.

✓ Continue to fill in patient information as needed until the

   document has been

   completed.

Note: EntryPoint will
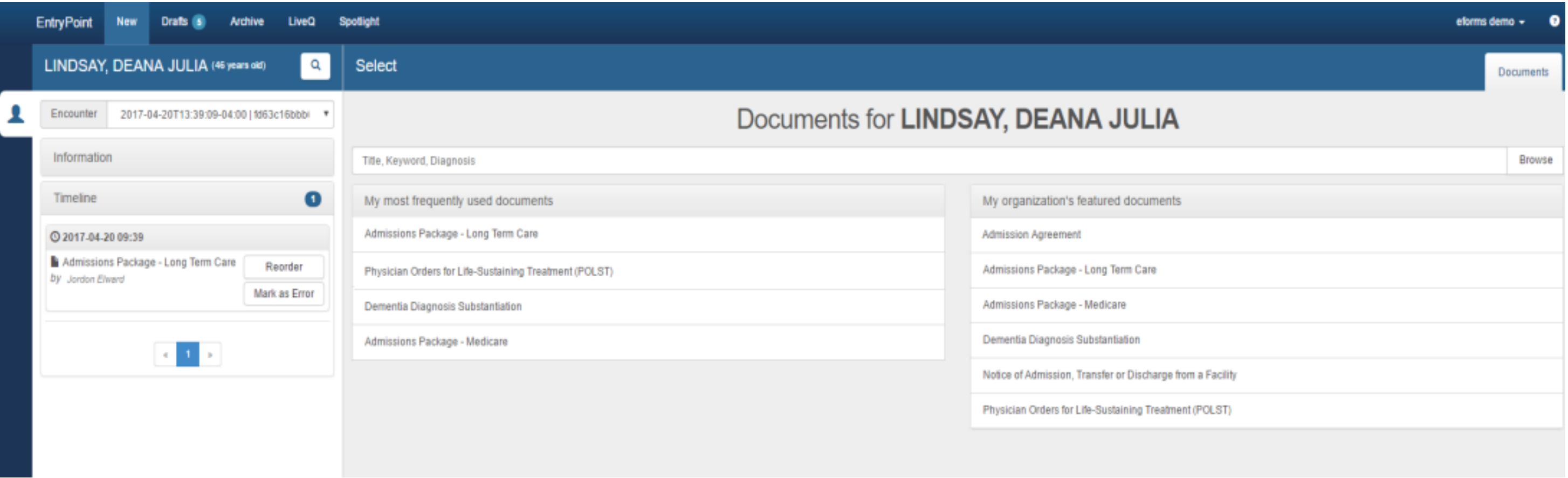
automatically save the draft of the document you are working on

at every instance that a change is made to it to ensure that you

do not lose any information you have entered.

Drop down menu

Editable text fields

Check boxes

7. Saving a document as draft

Click the Save Draft button above the document.

This can be done on any page within the document. You can then

continue to work on it or exit.

If you continue to work on the document, and decide to save as a

draft again, the new draft replaces the old version.

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8. Submitting a document

To submit a document:

1. Click Submit.

The document is submitted.

Your final document will appear in a preview window.

You can sign or print the document by clicking the Sign

Document or Print button above it.

9a. Signing locally – entering signers' names

& roles

To sign the document with the patient present:

1. Click Sign Document.

2. Enter the names of all of the signers in the Name of Signer fields. 3. Assign each signer their respective Signer Role using the drop-down menu.

Note: The order in which the signers are listed is the order in which they will sign the document. Ensure you are always listed last.

Note: In the event where there are both local and remote signers, EntryPoint will collect local signatures first.

4. When all signers' names and roles are entered, click Sign Document, and pass control of the device (laptop, tablet or computer mouse) to the first signer.

9b. Signing locally – signing the document

1. Click the checkbox to indicate that you agree to use electronic records and signatures.

2. Click Continue.

3. Click Start to begin signing. You will be directed to every signature in the document.

9b.

Sig

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nin

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4. To start

signing,

click SIGN

and the

eSignature

will ask for

you to select the generated signature or create your own. a) To adopt the

generated signature, simply click Adopt and Sign.

b) To create your own signature, click the Draw button and draw your signature.

c) Click Adopt and Sign.

To remove a signature, simply click on the signature again. To skip over a

signature, either scroll past it or click the yellow flag on the left.

9b. Signing locally – signing the document

6. Click the Finish button.

Repeat steps 1 through 6 for the remaining signers.

5. Continue clicking Sign until all mandatory and applicable optional signatures and initial fields have been filled.

10. Printing a hard copy of the document

document

To print a hard copy of the document:

1. Click the Print button at the top of your submitted document.

2. Select the correct printer under Destination by clicking the

Change... button.

3. Click the blue Print button to print the document.

11. Saving the document as a PDF file

To save the document as a PDF file:

1. Click the Print button at the top of your submitted document.

2. Under Destination, select Change..

3. Select Save as PDF.

11. Saving
the document

as a PDF file

4. Click the Save button.

5. Select the location on your computer or network you want to

save the document in.

6. Click Save.

12. Mark as Error &

Reorder

You can discard a document while in the process of filling it out, but you cannot discard or delete once it has been submitted.

In the event a document has been submitted in error, you can use the Mark as Error function.

Once a document has been marked as error, no additional changes can be made to it.

Note: You can only mark your own submitted documents as error.

The Reorder button allows the user to duplicate a previously submitted document and make necessary changes.

12. Mark as Error

You can mark a document as error through one of the following ways: From the Archive Tab:

1. Click on the arrow next to the View button of the document

you would like to mark as error. Click Mark as Error.

2. Enter your password.

3. Click Mark as Error.

Note: The entry in the Status column will now change from

Submitted to Error.

No more actions can be carried out on this document.

12. Mark as Error

From the patient's timeline:

1. In the patient's timeline, identify the document you would like

   to mark as error.

2. Click Mark as Error. Type in your password and click Mark as Error.

The document will now include a red flag reading "Document

marked as error" in the patient's timeline.

12. Mark as Error

After marking a document as error, a red watermark reading "Error –

Do Not Take Action" will appear on every page.

The status of the document in the Archive tab now appears as "Error".

13. Reorder a document

You can reorder a previously submitted

document from your patient's

timeline which appears on the left side of the page.

If you Reorder a document, you can make modifications to it and

submit as an updated or corrected document.

Note: You can only Reorder a document if it is the most updated

version.

If there are any content changes, the Reorder button will not appear.

This ensures that you are using the most up-to-date version of the

document.

14a. Signing remotely –

entering
signers' names
& roles

The remote signing feature is used when one or more signers are unable to sign a document in person. EntryPoint will send a secure email to the remote signer in order for them to review and sign from a computer or tablet.

Note: All signers following the remote signer must also sign remotely. Local signatures will be collected before remote signatures.

To send a document using remote signatures:

1. Click the Sign Document button.

2. Enter the names of all the signers and assign them a signer role. 3. Check the Sign Remotely box for all signers. Type in their email addresses.

14a. Signing remotely – entering signers' names & roles

Note: The order in which the signers are

listed is the order in which they will sign the document. Ensure you are always listed last.

4. Delete all unused signer lines.

5. Click Sign Document.

14b. Signing remotely – signing the document

6. The first remote signer will receive an

email (as shown in the image). They must click the Review Document button to view and sign the document.

Note: From this point on, remote signing follows the same steps as

local signing.

7. Once all remote signers have finished signing, you will receive an email from EntryPoint asking you to sign the document. Click Review

Document.

8. Select the checkbox to indicate that you agree to use electronic records and signatures. Click Continue.