

Sending Documents to the Sign Queue of a Document Contributor or Principal

Purpose

This guide outlines the steps on how to complete a document and send it to the Sign Queue of a document contributor or document principal, only **when required**.

When Does this Apply?

Standard documentation practice is that the user who is completing a document on Expanse, is the only user selected as the document contributor and document principal.

The pathway detailed below only applies when documents require consultants/other users to electronically sign as a contributor. **The document principal should only be changed to another user, if that document is to be filed as documented by them, and they are informed of this by the user in advance.**

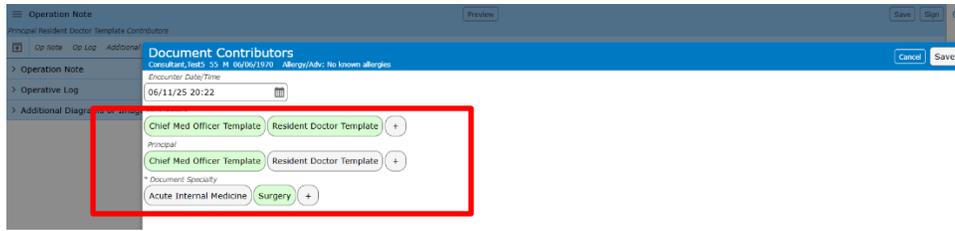
Documents **will not** be complete as Signed until **all** named document contributors and document principal have signed their documents. All users will be directed to their sign queue automatically, for any documents requiring their signature, generated over >24hrs ago.

Audience

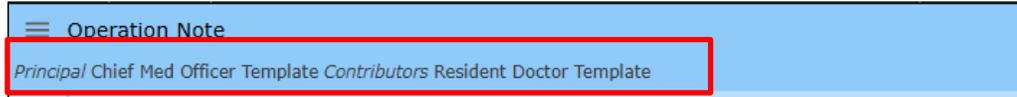
Resident Doctors, Surgical Fellows (HCA), Surgical CNSs

Version Control

Version	Date	Author	Changes Made
1.0	6/11/25	E Dhillon, Medical Services	



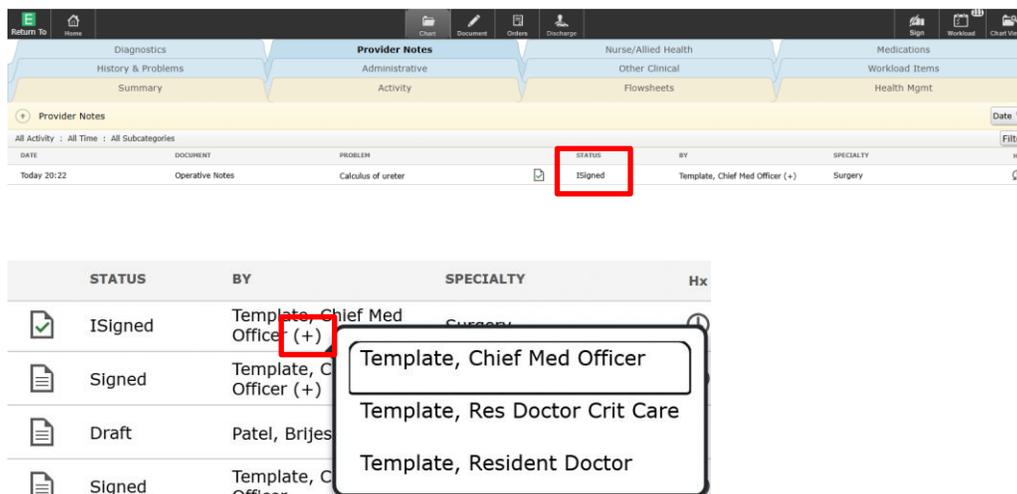
A document principal, will be auto populated as a document contributor



If a consultant is a **contributor** to this document, add them as a **contributor**. This may occur in scenarios like a procedure completed by you and the consultant. *Any users added as contributors will be required to sign the document, and it will be sent to their Sign queue. Until they do so, the document remains available to edit.*

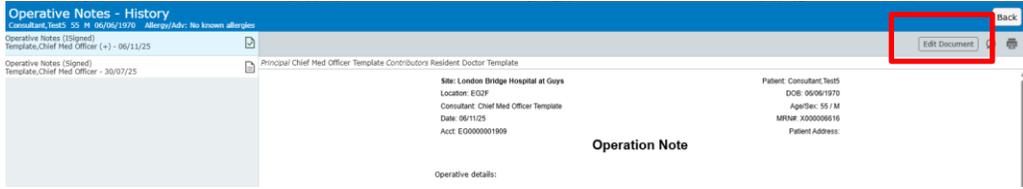
If the consultant is the **principal** of the document, i.e. you are writing this document entirely on their behalf, such as selected scenarios in theatres, add them as the **principal** of that document. There can only be **one** document principal. **The document principal represents who this document is by.** *Any users who are selected as the document principal will be required to sign the document, and it will be sent to their Sign queue. Until they do so, the document remains available to edit.*

1. Click **Sign**, to complete your document. This will bring up the '**Document Contributors**' overlay.
2. Add additional document contributors, if required. This will mean they will be required to sign the document too, for it to file as **Signed**.
3. In rare circumstances, where the document principal is not you, but is the consultant, amend them as the document principal. **You must ensure that the consultant is aware that the document will be filed as completed by them.**
4. Click **Save** on the *Document Contributors* overlay.
5. You can change this if required by clicking underneath the name of the document, where the selected principal and document contributors are shown.
6. Now sign the document using your PIN.



Your document will now appear in the Provider Notes tab as '**ISigned**' – indicating you have now signed the document, but other signature/s are pending. These are required for the document to reach a complete **Signed** status.

Note: The '**BY**' column in **Provider Notes** will reflect who the document **principal** is. When there is (+) icon, this indicates multiple contributors – click on it to see the names.



Note:
Until all named document contributors/principal sign the document, you can edit your document.

(If other users edit the same document, they are automatically added as document contributors upon saving or signing)

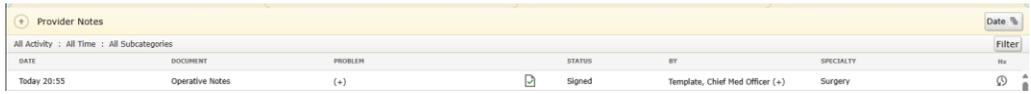
You can do this in a few ways, including selecting the document from the **Provider Notes** tab, and then clicking **Edit Document**.

Additional document contributors/principal can sign the document, by going to their sign queue, accessible via this icon:



Once all document contributors/principal have signed the document, the document will appear as **Signed**.

Users are force-taken to their sign queue when trying to order/ document, if there are documents generated >24hrs requiring their signature. This is to ensure documents are signed within a safe window.



Documented by:	Chief Med Officer Template	06/11/25 2055
Signed by:	<Electronically signed by Chief Med Officer Template>	06/11/25 2104
	<Electronically signed by Resident Doctor Template>	06/11/25 2100

When you view the signed document, you can see

1. Who the document is by (i.e. the document principal)

2. Who has signed the document (i.e. all document contributors)

The **date/time** of the 'document by' field reflects the **time that this document was initially generated**.

The **date/time of the e-sign** reflects the times the **document was signed by each user**.