**Background:**

Holton Manor has been trying to improve the admission process and the efficiency of documentation during admissions. Since the facility has already diminished paper-charting, the next step was to make majority of the admission paperwork electronic.

It was decided by Carriage Healthcare, Holton Manor’s management company, that Holton Manor would be the one piloting the electronic signing program. If the electronic signing program was to succeed, it would be Holton Manor’s responsibility to train other facilities and help them get going with the new program.

**Importance of Issue:**

The objective of this project was to make the majority of the admission paperwork electronic and easily available to resident/guardian and staff. This leadership project will make the admission process more efficient by making it easier for out-of-state guardians to sign admission paperwork and reduce the time to fill out admission documents.

**Methods:**

The team involved in this project was Administrator in Training (AIT), Nursing Home Administrator (NHA), Transitional Care Coordinator, DocuSign Support Team, and Carriage Healthcare.

**Step 1: Set up meetings with companies providing electronic signing service**

The two companies that Holton Manor set up 30 day trials with were Adobe Document Cloud and DocuSign. AIT will play around with each program to see which one was more user-friendly and met all legal/regulation requirements.

**Step 2: Get admission paperwork electronic**

AIT was responsible for getting all required admission paperwork on electronic format and arranged them in the order that they would be signed with the guidance of the Transitional Care Coordinator. Once all documents were in one document, AIT had to create templates for the necessary admission documents.

**Step 3: Decide on an electronic signing company**

AIT was responsible for informing the Business Development Manager of Carriage Healthcare on opinions between the two electronic signing companies. Carriage Healthcare signed a contract with DocuSign on 1/22/2016.

**Step 4: Develop a policy for electronic signatures**

AIT developed electronic signing policy and it was reviewed and approved by the corporate compliance officer of Carriage Healthcare and NHA.

**Step 5: Train Transitional Care Coordinator and Transitional Care Nurse**

AIT trained the appropriate staff who will be using the program with handouts, training videos, and DocuSign Support. Plan, Do, Check, Act was used in creating the templates for electronic signing. This was also a time, where corrections were made to the templates to make sure that all required fields were in place.

**Step 6: Measure Success**

Measurements collected by AIT were:

- Average length of time to complete admission paperwork non-electronically.
- Average length of time to complete admission paperwork electronically.
- Satisfaction survey given to both resident and staff regarding electronic signing.
- Number of consents & refusal for electronic signing.

**Results:**

**IMPROVEMENT IN DEPARTMENTS**

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<th>Improved</th>
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</thead>
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<td>60%</td>
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**STAFF SATISFACTION**

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<th>Satisfied</th>
<th>Moderately Satisfied</th>
<th>Not Applicable</th>
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</thead>
<tbody>
<tr>
<td>25%</td>
<td>34%</td>
<td>8%</td>
<td>33%</td>
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</table>

**RESIDENT SATISFACTION SURVEYS**

- There were no refusals in signing admission paperwork electronically. As of March 2016, out of 42 residents agreed to sign electronically.
- 12 out of 12 residents want Holton Manor to continue using electronic signing.
- 12 out of 12 residents felt that the electronic signing program was "very efficient" and easy to use.

**STAFF SATISFACTION SURVEYS**

- 9 out of 12 department heads felt the electronic signing program was either very efficient or efficient. The remaining selected "not applicable".
- 12 out of 12 department heads feel that Holton Manor should continue doing admission paperwork electronically.

**Conclusions:**

**SUCCESS:**

- Holton Manor was able to reduce the length of time to complete admission paperwork by 58%.
- Both staff and residents are satisfied with the new program.
- Staff is able to view admission paperwork right after admission, rather than wait for Health Unit Coordinator (HUC) to scan in the documents.
- There have been no refusals for electronic signing even when paper signing was offered.
- Both staff and resident feel that the program is easy or efficient.
- 5 other Wisconsin Illinois Senior Housing Facilities (W.I.S.H) have showed interest in implementing the electronic signing program.

**BARRIERS TO SUCCESS:**

- **Time:** Creating the templates was very time consuming. For every blank that needed to be filled in or signed there needed to be text boxes, check boxes, or drop-down menus needed to be created.
- **Funding:** Since it costs $414 per user/year, it was decided by the NHA to have only one user. There were templates created for the transitional care nurse and the social worker, so they could help the transitional care coordinator or when they are on-call for the weekend.
- **Communication:** DocuSign is located in California so the time difference between the two states does affect communication. It takes about 1-2 days to get a reply from DocuSign support.

**Recommendations:**

- To resolve concerns for future residents and families, Holton Manor should look into purchasing a large tablet with a stylus to use for signing. This will relieve thoughts on the legality of signatures for particular families and residents.
- When AIT leaves, the Transitional Care Coordinator will need to be successfully trained in DocuSign.
- The Transitional Care Coordinator should continue to take advantage of the DocuSign trainings to effectively use the program.

**Acknowledgements:**

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