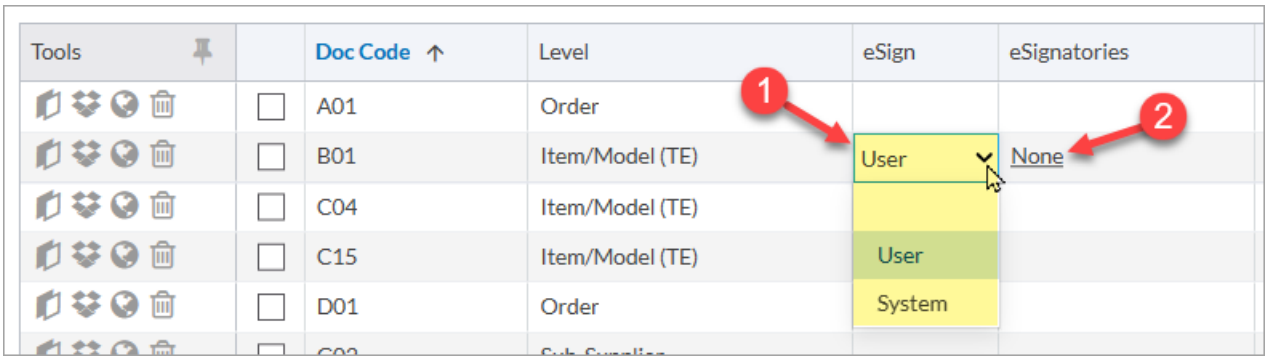
# Set eSignature requirements per Doc Code (or Card)

10/01/2025 4:08 pm MDT

This article explains the second step of the eSign process.

# Set Defaults per Doc Code

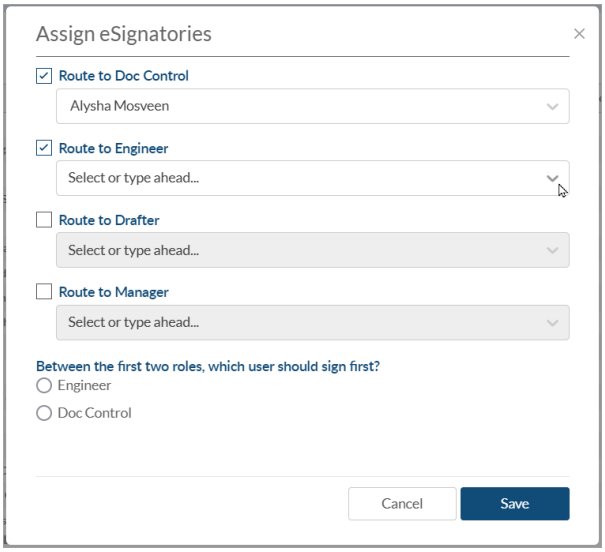
Default eSignature settings can be assigned to each Doc Code via the 2 eSign columns. This is step 2 in the eSign process.




1. Set the Type in the eSign column first.
   - Blank (no eSignature)
   - User - route to each user to apply a stamp
   - System - apply a hidden signature to each file without user input

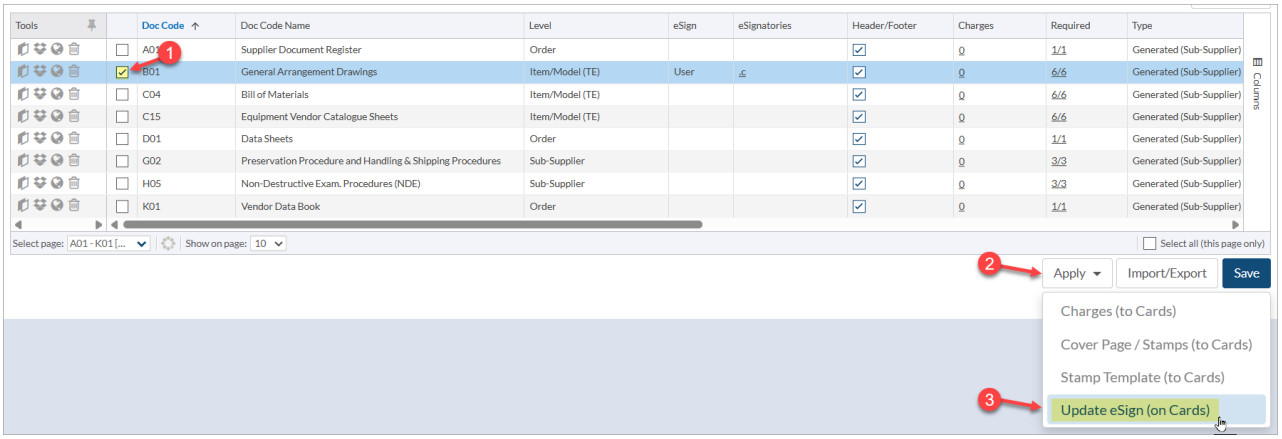
Once you've made your eSign selection, press save on the code list.

2. After saving, you will see the hyperlink to set the default eSignature recipients. Click to set.



# Apply change to cards

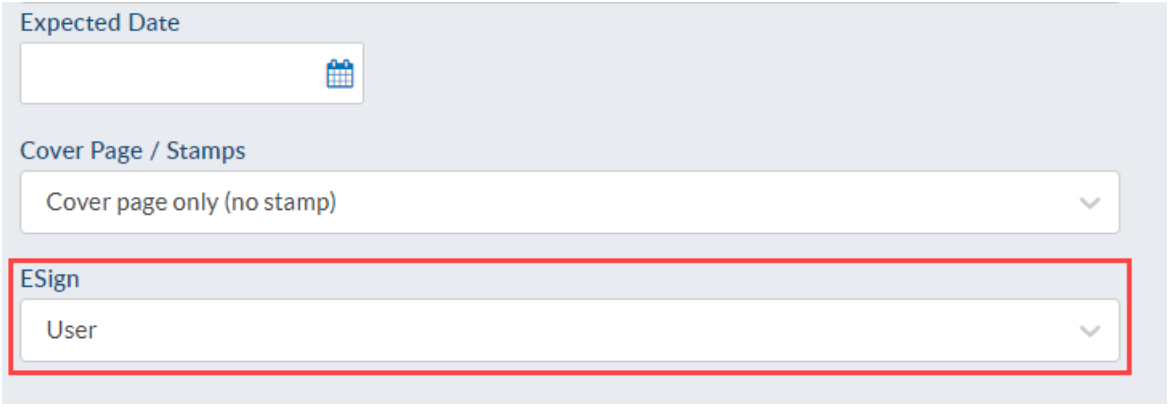
Note that if you change the eSignature settings on the code list AFTER the cards already exist, you must **apply the change** to the cards. This is done by selecting the codes, and clicking the **APPLY** button under the code list grid.




# Change eSignature type for a specific card:

On each card, you can edit ONLY the TYPE of eSignature (User or System). eSignatories (users who will sign the card) are managed via:

- default settings on the doc code, or
- changed during the submittal process.




For information on how to Generate eSignature Certificates (Step 1), see our article here.

For information on Applying eSignatures to Outgoing Submittals (Step 3), see our article here.

For information on Signing files with eSignature (User action) (Step 4), see our article here.