Household Manual Certification Register Form Script

8.11.20

Introduction

This on-demand training module is provided by the MN Department of Health WIC Program. It is an overview of how to use the Household Manual Certification Register Form.

Replace

The Household Manual Certification Register Form is an electronic form that is replacing **this** paper version.

In the same way as we currently use the paper form, we can use this electronic form to obtain a signature after certifying participants when we are unable to collect it in our information system due to either signature pad malfunction or if we were to accidentally cancel out of the Capture Electronic Signature screen at the end of the Certification Guided Script.

It also provides a mechanism for collecting signatures during remote visits if our participant or proxy has access to their email.

Overview

There are three basic scenarios, which we are listing in order of ease with which the form can be completed.

1. The participant/proxy is **not** in clinic and does **not** have access to email;
2. The participant/proxy **is in clinic** and can access your computer screen, whether it is at the time of the cert or at their next in-clinic visit; and
3. The participant/proxy is **not** in clinic but they currently **have access** to their email.

Scan Form

If we do use this register form, we need to remember to scan it into the participant folder for each household member that was certified.

reCAPTCHA

Before we start our form, we have to complete the reCAPTCHA.

Transition Slide

<display> *Transitions from intro slide to reCAPTCHA screen.*

reCAPTCHA1

reCAPTCHA is the “I’m not a robot” checkbox that displays when a form is first opened. It is currently one of the most common methods available for countering cyberattacks on forms.

Clicking the I’m not a robot checkbox…

<no audio> Click the I’m not a robot checkbox.

reCAPTCHA2

…will prompt a display that requires us to select specified images. This allows an analysis of our computer behavior to ensure that we are a human completing the form and not a computer or “bot”.

Starting from the top and moving from left to right, select all images with chimneys.

<no audio – failure hint> Click here.

Image

<no audio – failure hint> Click here.

<no audio – failure hint> Click here.

Once we’ve selected our images, we click Verify.

<no audio> Click **Verify**.

Checkmark

We have our checkmark so we are ready to begin. Click the **Begin Survey** button.

<no audio> Click the **Begin Survey** button.

Transition Slide

<display> *Transitions from reCAPTCHA screen to intro slide.*

No Signature

Of our three scenarios, let’s start with the easiest whereby we are unable to obtain a signature.

Use-Case #1

The use-case for this form would be:

If our sig pad malfunctioned or we canceled out of the signature screen, **and** we were doing a remote visit **and** our participant or proxy doesn’t have access to email, **and** we do **not** intend to have them sign at their next in-clinic visit.

That's a lot of caveats but in general, this would be the set of circumstances whereby we would not be able to obtain a signature in either the system or on this form.

Note

We would not use this form if able to create a signature record in the information system and policy allows us to write "TeleWIC visit" and our initials when performing a remote visit where our participant or proxy doesn't have access to email. Current policy, or procedures, should be verified with our program coordinator or State WIC Consultant.

Transition Slide

<display> *Transitions from into slide to form.*

Section 1

For this scenario, our sig pad has malfunctioned during a TeleWIC visit and our participant or proxy does not have access to email.

In preparation for completing the form, we're going to write down the household ID and State WIC IDs of those we certified.

<display> *HHID: 1357913 SWID: 10358479 - 81*

We begin in the CPA – Section #1 by completing the required fields, denoted with a red "must provide value" statement.

We start with the Household ID. Let's go ahead and type that in.

<no audio> Click into the **Household ID** field.

HHID

<display> *HHID: 1357913 SWID: 10358479 - 81*

<display> *NOTE: We don't have to type preceding zeros (if there are any).*

<no audio> Type the Household ID: **1357913.**

HH Members

The next field allows us to indicate the number of members certified, with the assumption that there won't be more than 6 at one time.

If we select 1…

<no audio> Click the **1** radio button.

1 Mbr

…one State WIC ID field displays and is required to be completed.

If we select 6…

<no audio> Click the **6** radio button.

<display> *State WIC ID fields expand.*

6 Mbrs Scroll

…6 State WIC ID fields display and must be completed.

Scroll

<no audio> Click above the scroll bar to return to the top of the form.

3 Mbrs

<display> *HHID: 1357913 SWID: 10358479 - 81*

<display> *NOTE: We don't have to type preceding zeros (if there are any).*

For this scenario, we've certified 3 household members. Go ahead and enter their State WIC IDs.

<no audio> Click the **3** radio button.

<no audio> Click into the first State WIC ID field.

<no audio> Type the first State WIC ID (**10358479**).

Second SWID

<no audio> Click below the scroll bar.

<no audio> Click into the second State WIC ID field.

<no audio> Type the second State WIC ID (**10358480**).

Third SWID

<no audio> Click into the third State WIC ID field.

<no audio> Type the third State WIC ID (**10358481**).

Reason

The next required field is Reason for Register. Click the drop-down.

<no audio> Click the **Reason for Register** drop-down.

There are 5 available options. Signature Pad Malfunction, Exited Capture Signature Screen, TeleWIC Visit, In-clinic Follow-up after TeleWIC Visit and Other.

If we select Other…

<no audio> Select **Other**.

We are required to type a reason.

However, in this scenario, our sig pad has stopped working. Go ahead and select the correct reason.

<no audio> Click the **Reason for Register** drop-down.

<no audio> Select **Signature Pad Malfunction**.

Scroll

We're just going to scroll down a little…

<display> *Screen scrolls down to CPA – Section #2.*

Section #2

CPA – Section #2 allows us to indicate whether the CPA signature was collected, using the signature pad, in the information system.

In this instance, our sig pad isn't working so we click the No radio button.

<no audio> Click the **No** radio button.

Section #2A

The section expands when we click No and we have three new required fields.

The first is the checkbox indicating we have verified the accuracy of the participant's information and have made the final eligibility/ineligibility determination, which is similar to what displays in the information system.

Go ahead and click the checkbox.

<no audio> Click the checkbox.

Section #2B

Next, we, the CPA, need to sign the form.

To open the Signature modal, which is a window that displays on top of this form, we click the Add Signature link.

<no audio> Click the **Add Signature** link.

CPA Sign FN

Using our mouse, or the pad of our finger if we have a touch-screen, we can sign the form.

<display> *Signature: Sue*

CPA Sign LN

<display> *Signature: Shee*

Save CPA Sig

Then click the **Save Signature** button.

<no audio> Click the **Save Signature** button.

CPA Date

Lastly, we click the Today button to indicate the date we are completing the form.

<no audio> Click the **Today** button.

Let’s click the scroll bar to view the next section.

<no audio> Click below the scroll bar.

Section #3 is also for us, the CPA.

In this scenario, our participant or proxy does not currently have access to their email. According to the instructions, we click the checkbox below, provide a reason, and click the Submit button.

Let’s do that.

Select the checkbox next to “Click if unable to capture participant/proxy signature”.

<no audio> Click the checkbox.

Section #3

Second step, select our reason why we were unable to collect their signature.

<no audio> Click the **Reason Unable to Collect Signature** drop-down.

We only have the two options: Participant/proxy does not have access to email or Other.

Again, if we were to select Other, we would be required to enter a reason.

However, our reason is no email…

…so we’ll select that.

<no audio> Select **Participant/Proxy does not have access to email**.

The next section is for the Participant or Proxy to complete.

Since they don't have email, we skip this section of the form. However, we need to note that we still must verbally review the Rights & Responsibilities with the participant or proxy. We're just not going to indicate that on this form since we aren't collecting their signature.

Go ahead and click below the scroll bar.

Verification

Before we can do our third step of submitting the form, we must first complete the CPA Form Completion Verification section.

We can think of this section as part of the final submission process since this radio button should ONLY be selected once the form has been entirely completed and we are officially ready to **submit** the form, which in this instance, we are.

<no audio> Click the **Yes** radio button.

Then go ahead and submit the completed form.

<no audio> Click the **Submit** button.

<display> *Transitions from form slide to intro slide.*

After Submit

After we have completed and **officially submitted** the form, the process is the same regardless of the scenario.

<display> *Transitions from intro slide to Close Survey slide.*

PDF Option #1

Before we close the survey, we need to obtain the PDF version of this form that we will want to scan into each household member's folder that was certified.

There are two options.

Option #1 is to download the survey response right now by clicking the Download button.

<no audio> Click the **Download** button.

Depending on our browser, we will be prompted to download, open and/or save the document.

Go ahead and click the Open button.

<no audio> Click the **Open** button.

We should save the document using the Household ID for quick reference.

The PDF version lists all fields from the form.

<no audio> Click when ready to continue.

<no audio> Click when ready to continue.

<no audio> Click when ready to continue.

<display> Transitions from PDF back to Close Survey window in browser.

PDF Option #2

Option #2 is to enter our email address…

<typing>

…and send a confirmation email to ourselves with the PDF attached.

<no audio> Click the **Send Confirmation Email** button.

Click the Close button on the message indicating the email was successfully sent.

<no audio> Click the **Close** button.

If we selected option #2, we should wait to close the survey until we've verified we've received the email.

<display> *Transitions to Outlook email.*

The email, from the MDH WIC Program should arrive within 5 minutes.

When we open it…

<no audio> Double-click on the email

…we can see that the PDF has been attached.

<no audio> Click when ready to continue.

<display> *Transitions from email to intro slide.*

Signature in Clinic

Our second scenario is based on the participant or proxy being in clinic and able to access our computer screen to sign.

Use-Cases #2

The use-cases for using this form would be:

If our sig pad stopped working, or we accidentally canceled out of either of the capture signature screens at the end of the Cert Guided Script, OR **our agency chooses** to collect the participant or proxy's signature at the next in-clinic visit after a remote visit where the participant or proxy didn't have access to email.

Note 1

If **our agency chooses** to collect the signature at the next in-clinic visit, we should verify what should be written on the sig pad at the time of the remote visit (for example: "TeleWIC visit" and our initials).

Scenario 2

<display> *Transitions to Household Manual Cert Register from – CPA Section #1.*

Our scenario this time is that we are following up a remote visit, and since our agency chooses to do so, collecting the participant/proxy's signature at their next in-clinic visit.

According to the alert in the information system, we should collect the participant/proxy signature on the Manual Cert form for SWIDs: 8874921 and 10384562.

<display> *Pen writes HHID and SWIDs.*

Required Fields

Since we're already familiar with the required form fields in CPA Section #1 we'll just quickly fill those in.

<display> *Household ID = 11348572*

<display> *2 State WIC IDs radio button.*

<display> *State WIC ID 1 = 8879421*

<display> *Scrolls to lower in Section #1 of form.*

<display> *State WIC ID 1 = 10384562*

Now that we've completed the ID fields, let's click the Reason for Register drop-down.

<no audio> Click the **Reason for Register** drop-down.

Our reason is: In-clinic Follow-up after TeleWIC Visit. Go ahead and select it.

<no audio> Select **In-clinic Follow-up after TeleWIC Visit.**

In CPA – Section #2, based on the alert from JD, we can assume the CPA Signature was captured in the Information System at the time of the remote-visit cert, so we can select the Yes radio button.

<no audio> Click the **Yes** radio button.

Section #3_1

The instructions in CPA section #3 don't apply because it doesn't matter if our participant or proxy has access to email.

They can access our screen and use either a mouse designated for participants, or our mouse, either of which we will diligently clean after use. If our screen is a touch-screen, they could also use the pad of their finger to sign.

Let's move further down the form.

<no audio> Click below the scroll bar.

Ppt Signature

<display> Screen scrolls down to PARTICIPANT/PROXY section with Rights & Responsibilities link.

The instructions in the PARTICIPANT/PROXY section of the form are to assist them if we are doing a remote visit.

Since they are in clinic with us, we can walk them through the next step and click on the link ourselves (or we should note, we could show them the R & R in the usual manner, such as a laminated form).

<no audio> Click the **Participant/Proxy Rights & Responsibilities** link.

The web page will open in a new browser window.

R & R

Once the participant/proxy has reviewed the Rights & Responsibilities, we can close the browser tab.

<no audio> Click the X on the tab to close it in the browser.

Next, we would have the participant or proxy read the statement: I have reviewed my rights and responsibilities and to the best of my knowledge the information I have given is true…

<display> *Go ahead and read this statement and click the checkbox if you agree.*

…and select the checkbox.

<display> *Red cursor selects the checkbox.*

Then they can click the Add Signature link to open the modal.

<display> *And click the Add Signature link…*

<no audio> Red cursor clicks the **Add Signature** link.

<display> *…and sign your name*

PPT Sign FN

<display> *Signature: Moe*

PPT Sign LN

<display> *Signature: Beal*

Save Signature

Once they've signed, they can click the Save Signature button and close the modal.

<display> *That's great! Go ahead and save it.*

<display> *Red cursor clicks the Save Signature button.*

PPT Date

The next field…

<no audio> Click below the scroll bar.

…is the date, which should still be the current date since that is the date we are collecting the signature.

<display> *Last thing, go ahead and click the Today button for the date.*

<display> *Today is July 23, 2020.*

Go ahead and click the Today button.

<no audio> Click the **Today** button.

<display> *Date = 7/23/20*

The next section is our form completion verification indicating we have collected the signatures and are officially ready to submit it.

Complete the form and submit it.

<no audio> Click the **Yes** radio button.

<no audio> Click the **Submit** button.

Options

The same options are available: Download the PDF or send it in an email to ourselves.

<no audio> Click when ready to continue.

<display> *Top portion of first page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Middle portion of first page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Bottom portion of first page and top portion of second page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Top half of second page of PDF displays.*

<no audio> Click when ready to continue.

Remote Signature

<display> *Transitions from PDF to intro slide.*

Our last scenario occurs when the participant or proxy is **not** in clinic and **does have** access to their email.

Use-Case #3

Our use-case for this form would be if we were performing a remote or TeleWIC visit where the participant or proxy currently has access to their email, which means we can actually obtain their signature during the appointment.

Best Practice

Before starting the form, best practice would be to ask if they currently have access to their email.

And if so, whether they would be OK with a link to a form being sent via email in order to get their signature, explaining that because this is a remote appointment, we can’t use the signature pad.

If they are OK with it, write down the email address they currently have access to.

Required Fields 1

<display> *Transitions from best practices slide to top of form.*

For this scenario, once again we’ll quickly complete the required fields.

<display> *Household ID: 13572894*

<display> *2 State WIC IDs*

<display> *First State WIC ID: 10394572*

<display> *Screen scrolls down.*

<display> *Second State WIC ID: 10394573*

Go ahead and select our reason for the register.

<no audio – failure hint> Click the **Reason for Register** drop-down.

<no audio – failure hint> Select **TeleWIC Visit.**

Section #2_1

In CPA – Section #2, since we are performing a remote-visit cert, and our sig pad is functioning just fine, we were able to capture our signature in the Information System, so we click Yes.

<no audio> Click the **Yes** radio button.

The directions in CPA-Section #3 also address this scenario.

If the participant or proxy currently has access to their email, click the Save & Return Later button.

OK then. We need to scroll to get to the button.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

Submit Button

Remember, the Yes radio button in the CPA Form Completion Verification section is only selected once the necessary signatures have been collected.

We have yet to collect the participant or proxy's signature, so we don't select it now.

If we were to accidentally click the Submit button…

Error

…an error displays since the Yes radio button must be selected to actually submit the form, which means we can't accidentally submit it before it's ready.

Scroll

<display> Form scrolls back to bottom.

Save & Return

As the form directed, let's click the Save & Return Later button.

<no audio> Click the **Save & Return Later** button.

We don't want to close this tab because once the participant or proxy signs, we will need access to the Continue Survey Now button, which allows us to return to the same form.

Enter Email

In the Enter Email Address field, type the participant or proxy's email…

<no audio> Type the PCH's email address.

Send Email

…and click the **Send Survey Link** button.

<no audio> Click the **Send Survey Link** button.

Go ahead and click Close on the Email Sent message.

<no audio> Click the **Close** button.

Email to Ourselves?

If we have access to our own email, we can also send the link to the form to ourselves. That way, we can guide them through the next steps by walking through it with them.

And, if we were to close our browser window, we'd be able to re-open the same form.

If we don't have access to email, the instruction document for this form includes each step we will want to guide the participant or proxy through.

Instructions

<display> *Transitions from form and instructions doc to instructions screen*.

For this, let's use the instruction document…

We want to let our participant or proxy know that we've sent a link to the form to capture their signature in an email they should receive pretty quickly (usually within 1-3 minutes). And that it will be from REDCap Administrator with a subject of "Survey partially completed".

<display> *OK. I've sent a link to the form to capture your signature in an email, which you should receive pretty quickly.*

<display> *It'll be from the REDCap Administrator and will have a subject of "Survey Partially Completed".*

Unfortunately, we can't change who the email is from, or the content of the email, for a partially completed form. REDCap is simply the software used to create the form.

Phone Form

Once the participant or proxy has received the email, have them open it.

<display> *Got it? Great! Go ahead and open it.*

Have them click (or tap) the **Household Manual Certification Register – Minnesota WIC** link. If it doesn't open the form in a browser they can also copy and paste the second link into a browser.

<display> *OK. Now open the link that says "Household Manual Certification Register – Minnesota WIC".*

<display> *It's going to open online or in a browser window.*

Next, have them scroll down to the PARTICIPANT/PROXY section of the form…

<display> *Now, scroll down to the participant/proxy section of the form…*

R & R on Phone

… and click or tap the **Participant/Proxy Rights & Responsibilities** link, which will open in a new tab.

<display> *Click on tap the Participant/Proxy Rights & Responsibilities link,*

Have them review the Rights & Responsibilities and ask them to let you know when they are done.

<display> *Go ahead and review them and just let me know when you're done.*

<display> *Done? Great! Any questions? OK. Go ahead and close that and return to the form.*

Sign on Phone

Have them click the checkbox next to the **I have read my rights and responsibilities…** statement.

<display> *See the checkbox that says you reviewed the Rights & Responsibilities? Click or tap that.*

The green Add Signature link will now display. Have them open it.

<display> *OK. So now a green Add Signature link should be showing. See it? Great! Click or tap that.*

Ask them to use their mouse, or finger if using a touch-screen, to sign their name on the line, then to click or tap the Save Signature button.

<display> *Just use your mouse, or finger if you have a touch-screen, and sign your name on the line.*

<display> *Once you're done, click the Save Signature button.*

Date on Phone

Next, have them click the Today button for the date.

<display> *Next, click the Today button just below your signature to record the date you signed the form.*

Last step is to have the participant or proxy scroll to the very bottom of the form, if necessary, and click the Save & Return Later button.

<display> *Lastly, do you see a Save & Return Later button at the bottom of the form? If not, just scroll down to it.*

<display> *Go ahead and click the Save & Return Later button.*

Submit Instead?

What if they hit the Submit button instead?

The same message displays indicating they can't submit until all required fields are completed.

If that occurs, simply have them click Okay on the message, scroll to the very bottom again, and correctly click or tap the Save & Return Later button.

Thank them for completing their part and let them know they can close the browser window.

Continue Survey

<display> *Transitions from instructions slide to Survey Partially Completed browser window.*

We can return to the survey by clicking the **Continue Survey Now** button on our still-open browser window.

We should note, if we sent an email to ourselves and were walking through the form with our participant or proxy, we could simply click the refresh icon on the browser window to view the change and complete the form.

Since we used the instruction document, we'll click the Continue button.

<no audio> Click the **Continue Survey Now** button.

Submit Form

Let's click below the scroll bar…

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

…and we can see the form now has the participant or proxy's signature.

Click one more time to reach the bottom of the form.

<no audio> Click below the scroll bar.

Last step to complete the form? We click **Yes** in the Completion Verification section to indicate we have reviewed the form before submitting it.

<no audio> Click the **Yes** radio button.

And then submit it.

<no audio> Click the **Submit** button.

Options 1

And we have the same options…

<no audio> Click when ready to continue.

<display> *Top portion of first page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Middle portion of first page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Bottom portion of first page and top portion of second page of PDF displays.*

<no audio> Click below the scroll bar.

<display> *Top half of second page of PDF displays.*

<no audio> Click when ready to continue.

<display> *Transition from PDF to exit slide.*

End Slide

Thank you for reviewing this on-demand training module presented by the Minnesota Department of Health – WIC Program.

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