

How to Complete the Household Manual Cert Register

7/23/20

Form overview

Used to capture the CPA and Participant/Proxy signatures when unable to capture electronic signatures in the Information System due to:

- Signature pad malfunction;
- Exiting the Capture Electronic Signature screen in HuBERT before Primary Cardholder signs; or
- Performing remote teleWIC visits.



Before starting, if the Participant/Proxy is **not in clinic**, ask if they currently have access to their email.

Instructions for Completing Form

- [Participant/Proxy is not in clinic and currently does NOT have access to their email](#)
- [Participant/Proxy is in clinic and can access your computer screen](#)
- [Participant/Proxy is not in clinic and currently has access to their email](#)

NOTE! This form should be scanned into the Participant Folder of each household member who was certified.

Participant/Proxy is not in clinic and currently does NOT have access to their email

STEP 1: Complete the required fields in CPA – Section #1.

- Enter the Household ID.
- Select the number of household members being certified.
- Enter the State WIC ID for each certified member.
- Select a reason from the **Reason for manual register** drop-down.
 - If Other, type the reason into the **Other reason** text box.

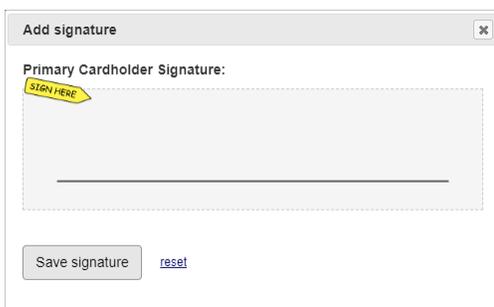
STEP 2: Indicate whether you were able to sign using the signature pad in CPA – Section #2.

I've completed the Capture Staff Electronic Signature portion of the Certification(s) using the signature pad.

* must provide value

Yes No

- If clicked **Yes** radio button – go to STEP 3.
- If clicked **No** radio button, complete STEPS A – E below then continue with STEP 3:
 - STEP A: Click the checkbox to indicate you have determined eligibility/ineligibility:
 I have verified the accuracy of the participant's information and have made the final eligibility/ineligibility determination.
 - STEP B: Click the [Add signature](#) link under **Signature of CPA making final eligibility/ineligibility determination**.
 - STEP C: Use your mouse, or finger if your computer screen is a touch-screen, to sign on the signature line on the *Add Signature* pop-up window.



- STEP D: Click the [Save signature](#) button on the *Add Signature* pop-up window.
- STEP E: Select the [Today](#) button for the **Date**.

STEP 3: Click the [Click if unable to capture participant/proxy's signature.](#) checkbox in the CPA – Section #3.

STEP 4: Select a reason from the **Reason unable to collect signature** drop-down.

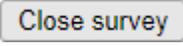
- If **Other** is selected, type a reason into the **Other Reason** textbox.

STEP 5: Scroll down to the **CPA: FORM COMPLETION VERIFICATION** section at the bottom of the form. Click the **Yes** radio button to indicate you've reviewed the form and are ready to submit it.

CPA: I have reviewed this form before submitting. Yes

STEP 6: Click the  button.



Do NOT click the  button yet!

STEP 7: Obtain the PDF version of the form on the "Close Survey" web page:

- Option 1: Click the  button to download a PDF version of the completed form.
- Option 2: You can enter your email address and click the "Send confirmation email" button to receive a confirmation email with the PDF version of the form as an attachment.

STEP 8: Click the  button to close the web page.

STEP 9: Scan the PDF version of the form into the Participant Folder of each household member who was certified.



If you accidentally close the survey before obtaining the PDF, please email Rachel.Hannigan@state.mn.us or Sarah.Mallberg@state.mn.us, provide the form name and the Household ID. You should receive the PDF within 3-5 business days.

Participant/Proxy is in clinic and can access your computer screen

STEP 1: Complete the required fields in CPA – Section #1.

- Enter the Household ID.
- Select the number of household members being certified.
- Enter the State WIC ID for each certified member.
- Select a reason from the **Reason for manual register** drop-down.
 - If Other, type the reason into the **Other reason** text box.

STEP 2: Indicate whether you were able to sign using the signature pad in CPA – Section #2.

I've completed the Capture Staff Electronic Signature portion of the Certification(s) using the signature pad.
* must provide value
 Yes No

- If clicked **Yes** radio button – go to STEP 3.
- If clicked **No** radio button, complete STEPS A – E below then continue with STEP 3:
 - STEP A: Click the checkbox to indicate you have determined eligibility/ineligibility:
 - By signing this I am indicating I have determined the participant's eligibility/ineligibility for the WIC program.
 - STEP B: Click the [Add signature](#) link under **Signature of CPA making final eligibility/ineligibility determination.**
 - STEP C: Use your mouse, or finger if your computer screen is a touch-screen, to sign on the signature line on the *Add Signature* pop-up window.



- STEP D: Click the [Save signature](#) button on the *Add Signature* pop-up window.
- STEP E: Select the [Today](#) button for the **Date**.

STEP 3: Scroll to the PARTICIPANT/PROXY section of the form.

NOTE! The next steps will be completed by the Participant/Proxy.

STEP 4: If they haven't already, have the Participant/Proxy view the Rights & Responsibilities.

- Option to click the [Participant/Proxy Rights & Responsibilities:](#) link to open the Rights & Responsibilities page on the MDH WIC website.

STEP 5: Provide a mouse for the Participant/Proxy to use (or they can use their finger if you have a touch-screen) and guide them through the following steps on your computer:

- Have the Participant/Proxy read and click the checkbox for the following statement:

I have reviewed my rights and responsibilities and to the best of my knowledge the information I have given is true.

- Have the Participant/Proxy click the [Add signature](#) link under **Signature of participant/proxy.**
- In the *Add Signature* pop-up window, have the participant/proxy use the mouse, or their finger if you have a touch-screen, to sign their name on the line provided.

- Have the Participant/Proxy click the [Save signature](#) button on the *Add Signature* pop-up window.

- Have the Participant/Proxy click the [Today](#) button for the **Date.**

NOTE! The next steps will be completed by the CPA.

STEP 6: Scroll down to the **CPA: FORM COMPLETION VERIFICATION** section at the bottom of the form. Click the **Yes** radio button to indicate you've reviewed the form and are ready to submit it.

CPA: I have reviewed this form before submitting. Yes

STEP 7: Click the [Submit](#) button.



Do **NOT** click the [Close survey](#) button yet!

STEP 8: Obtain the PDF version of the form on the "Close Survey" web page:

- Option 1: Click the [Download](#) button to download a PDF version of the completed form.
- Option 2: You can enter your email address and click the "Send confirmation email" button to receive a confirmation email with the PDF version of the form as an attachment.

HOW TO COMPLETE THE HOUSEHOLD MANUAL CERT REGISTER

STEP 9: Click the button to close the web page.

STEP 10: Scan the PDF version of the form into the Participant Folder of each household member who was certified.



If you accidentally close the survey before obtaining the PDF, please email Rachel.Hannigan@state.mn.us or Sarah.Mallberg@state.mn.us, provide the form name and the Household ID. You should receive the PDF within 3-5 business days.

Participant/Proxy is not in clinic and currently has access to their email

NOTE! Before beginning, ask the participant/proxy for their email address (and write it down). Ensure that it is OK to send a link to a form to their email in order to get their signature.

STEP 1: Complete the required fields in CPA – Section #1.

- Enter the Household ID.
- Select the number of household members being certified.
- Enter the State WIC ID for each certified member.
- Select a reason from the **Reason for manual register** drop-down.
 - If Other, type the reason into the **Other reason** text box.

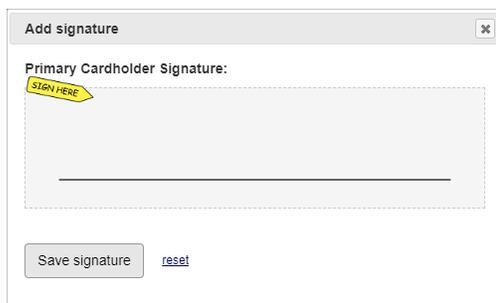
STEP 2: Indicate whether you were able to sign using the signature pad in CPA – Section #2.

I've completed the Capture Staff Electronic Signature portion of the Certification(s) using the signature pad.

* must provide value

Yes No

- If clicked **Yes** radio button – go to STEP 3.
- If clicked **No** radio button, complete STEPS A – E below then continue with STEP 3:
 - STEP A: Click the checkbox to indicate you have determined eligibility/ineligibility:
 By signing this I am indicating I have determined the participant's eligibility/ineligibility for the WIC program.
 - STEP B: Click the [Add signature](#) link under **Signature of CPA making final eligibility/ineligibility determination.**
 - STEP C: Use your mouse, or finger if your computer screen is a touch-screen, to sign on the signature line on the *Add Signature* pop-up window.



- STEP D: Click the  button on the *Add Signature* pop-up window.

HOW TO COMPLETE THE HOUSEHOLD MANUAL CERT REGISTER

- STEP E: Select the **Today** button for the **Date**.

STEP 3: Scroll to the bottom of the form and click the **Save & Return Later** button.

STEP 4: On the “Your survey responses were saved!” web page, enter the Participant/Proxy’s email address and click the “Send Survey Link”.

STEP 5: Click the **Close** button on the “Email sent!” message.



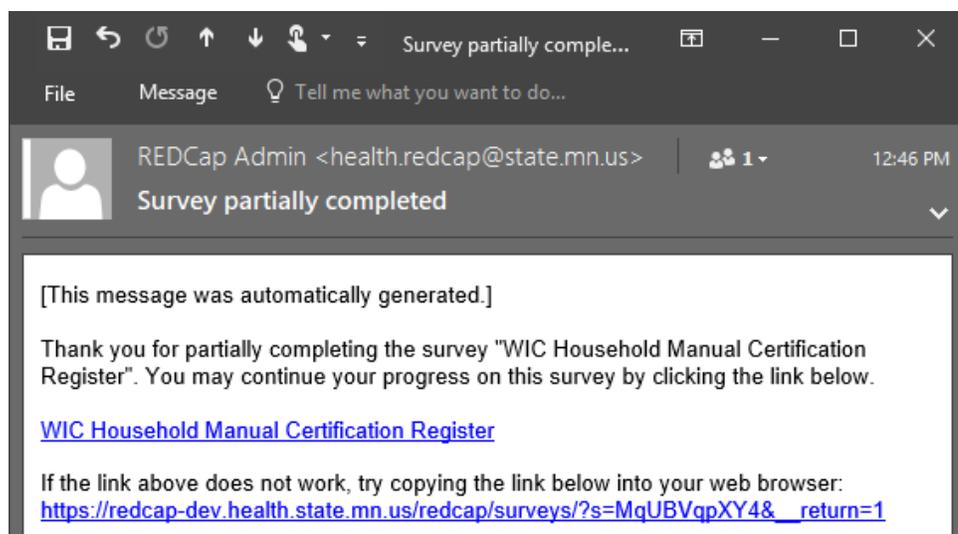
STEP 6: Do NOT close the “Your survey responses were saved!” web page – KEEP IT OPEN!

If you have access to your own email, you can email the link to the form to yourself as well. This may make it easier to walk through the next steps with the Primary Card holder. Otherwise, the steps are listed below for your reference.

If you close the web page, and haven’t sent the link to the form to yourself, you will need to start over with a new form.

NOTE! The next steps will be completed by the Participant/Proxy.

STEP 7: Ask the Participant/Proxy to open their email and let them know that they should receive an email within 1 – 5 minutes from **REDCap Administrator** with the subject of “Survey partially completed”.



STEP 8: Walk the Participant/Proxy through the following steps:

- Open the email from the REDCap Administrator.
 - Click the [Household Manual Certification Register - Minnesota WIC](#) link on the email (if the form doesn't open in a web page, they can copy and paste the second link listed into their browser).
- Scroll down to the PARTICIPANT/PROXY section of the form.
- Click the [Participant/Proxy Rights & Responsibilities:](#) link to open the Rights & Responsibilities page on the MDH WIC website. This will open in a new tab. Ask the Participant/Proxy to review them.
- Close the Rights & Responsibilities window, which should return to the tab/window that displays the form.
- Read and click the checkbox for the following statement:

I have reviewed my rights and responsibilities and to the best of my knowledge the information I have given is true.
- Click the [Add signature](#) link under **Signature of participant/proxy**.
- In the *Add Signature* pop-up window using their mouse, or finger if a touch-screen, sign their name on the line provided
- Click the [Save signature](#) button on the *Add Signature* pop-up window.
- Click the [Today](#) button for the **Date**.
- Scroll to the bottom of the form. Click the [Save & Return Later](#) button. (Clicking the "Submit" button will result in a "NOTE: Some fields are required!" message. If this displays, have them click **Okay** on the message and correctly click the **Save & Return Later** button instead.)
- Close the "Your survey responses were saved!" web page in their browser.

NOTE! The next steps will be completed by the CPA.

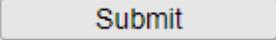
*If you sent an email to yourself and were walking through the form with the Participant/Proxy, you could simply click the **Refresh** icon on the browser window to view the change and complete the form.*

STEP 9: Click the [Continue Survey Now](#) button On the "Your survey responses were saved!" web page open in your browser, which you kept open in STEP 6.

STEP 10: Scroll down to the PARTICIPANT/PROXY section of the form. Verify the Participant/Proxy's signature and date now display.

STEP 11: Scroll down to the **CPA: FORM COMPLETION VERIFICATION** section at the bottom of the form. Click the **Yes** radio button to indicate you've reviewed the form and are ready to submit it.

CPA: I have reviewed this form before submitting. Yes

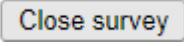
STEP 12: Click the  button.



Do NOT click the  button yet!

STEP 13: Obtain the PDF version of the form on the "Close Survey" web page:

- Option 1: Click the  button to download a PDF version of the completed form.
- Option 2: You can enter your email address and click the "Send confirmation email" button to receive a confirmation email with the PDF version of the form as an attachment.

STEP 14: Click the  button to close the web page.

STEP 15: Scan the PDF version of the form into the Participant Folder of each household member who was certified.



If you accidentally close the survey before obtaining the PDF, please email Rachel.Hannigan@state.mn.us or Sarah.Mallberg@state.mn.us, provide the form name and the Household ID. You should receive the PDF within 3-5 business days.

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