

# How to Complete the Primary Cardholder Register

UPDATED 7/15/20

## Form overview

Used to capture the Primary Cardholder's signature when unable to capture an electronic signature in the Information System due to:

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



Before starting, if the Primary Cardholder is **not in clinic**, ask if they currently have access to their email.

## Instructions for Completing Form

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

**NOTE!** This form should be scanned into each currently active household member's participant folder.

## Primary Cardholder is not in clinic and currently does NOT have access to their email

STEP 1: Complete the required fields in the first section of the form.

STEP 2: Click the  **Click if unable to capture Primary Cardholder's signature.** checkbox.

STEP 3: 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 4: Scroll down to the CPA FORM COMPLETION VERIFICATION section at the bottom of the form. Click the **Yes** radio button to the right of the **CPA: I have reviewed this form before submitting.**

STEP 5: Click the  button.



Do **NOT** click the  button yet!

STEP 5: 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 6: Click the  button to close the web page.

STEP 7: Scan the PDF version of the form into each active household member's folder.



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

## Primary Cardholder is in clinic and can access your computer screen

STEP 1: Complete the required fields in the first section of the form.

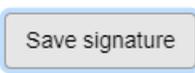
STEP 2: Scroll down to the PRIMARY CARDHOLDER section of the form. Click the  [Add signature](#) link under **Primary Cardholder Signature**.

**NOTE!** The next steps will be completed by the Primary Cardholder.

STEP 3: Have the Primary Cardholder use a mouse, or their finger if your computer screen is a touch-screen, to sign on the signature line on the *Add Signature* pop-up window.



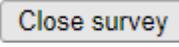
**NOTE!** The next steps will be completed by the CPA

STEP 4: Click the  button on the *Add Signature* pop-up window.

STEP 5: Scroll down to the CPA FORM COMPLETION VERIFICATION section at the bottom of the form. Click the **Yes** radio button to the right of the **CPA: I have reviewed this form before submitting**.

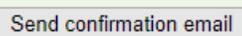
STEP 6: Click the  button.



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  [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.



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

**STEP 9: Scan the PDF version of the form into each active household member's folder.**



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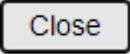
## Primary Cardholder is not in clinic and currently has access to their email

STEP 1: Ask the Primary Cardholder for their Email Address.

STEP 2: Complete the required fields in the first section of the form.

STEP 3: Scroll to the bottom of the form. Click the  button at the bottom of the form.

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

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



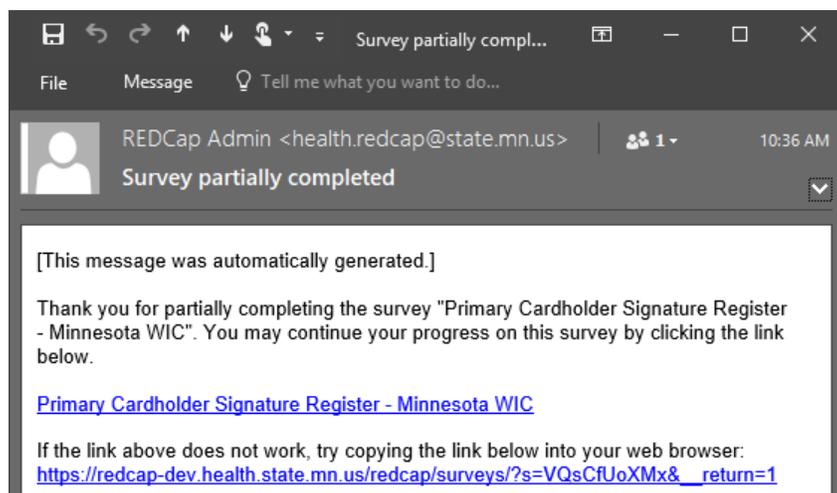
**STEP 6: Do NOT close the “Your survey responses were saved!” web page – KEEP IT OPEN!**

*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 Primary Cardholder.

STEP 7: Ask the Primary Cardholder 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 Primary Cardholder through the following steps:

- Open the email from REDCap Administrator.
- Click the [Primary Cardholder Signature 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 PRIMARY CARDHOLDER section of the form. Click the [Add signature](#) link under **Primary Cardholder Signature**.
- 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. Their signature should now display on the form.
- 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.

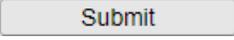
*If you sent an email to yourself and were walking through the form with the Primary Cardholder, you could simply click the **Refresh** icon on the browser window to view the change and complete the form.*

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.

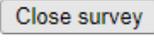
STEP 10: Scroll down to the PRIMARY CARDHOLDER section and verify the Primary Cardholder’s signature now displays on the form.

HOW TO COMPLETE THE PRIMARY CARD HOLDER REGISTER

STEP 11: In the CPA FORM COMPLETION VERIFICATION section at the bottom of the form, click the **Yes** radio button to the right of the **CPA: I have reviewed this form before submitting.**

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 each active household member’s folder.**



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*Minnesota Department of Health - WIC Program 85 E 7<sup>th</sup> Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4444, [health.wic@state.mn.us](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); To obtain this information in a different format, call: 651-201-4444*