

Primary Card Holder Register Form Script

7.28.20

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 Primary Card Holder Register Form.

Replace

The Primary Card Holder 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 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 Signature for Card screen.

It also provides a mechanism for collecting signatures during remote visits if our participant 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 Primary Cardholder is **not** in clinic and does **not** have access to email;
2. The Primary cardholder **is in clinic** and can access your computer screen, whether it is at the time the card is issued or at their next in-clinic visit; and
3. The Primary Cardholder 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 each currently active household member's participant folder.

reCAPTCHA

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

Transition Slide

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

Overview 1

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.

reCAPTCHA1

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 mountains and hills.

<no audio – failure hint> Click here.

Image

<no audio – failure hint> Click here.

Image 1

<no audio – failure hint> Click here.

Verify

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 Primary Cardholder 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 Primary Cardholder doesn't have access to email. Current policy, or procedures, should be verified with your program coordinator or State WIC Consultant.

Scenario 1

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

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

We have written down the information we need to complete the form: Household ID, the last 10 digits of the Card Number and the name of the Primary Card Holder.

<display> *HHID: 13579135*

<display> *Card: 9300000123*

<display> *PCH: Rose Dale*

Required Fields

We begin by completing all of the required fields, which are denoted with a red "must provide value" statement.

Click the Today button to indicate the date we completed the form.

<display> *Today is July 1, 2020.*

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

HHID

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

HHID1

Next, we type the Household ID, and like in our information system, we don't have to enter preceding zeros if there are any.

<no audio> Type the Household ID: **13579135**.

Card

<no audio> Click or tab into the **Card Number** field.

Card #1

Like the Mobile App, we only type in the last 10 digits of the WIC Card number.

<no audio> Type the last 10 digits of the Card Number: **9300000123**

PCH

<no audio> Click or tab into the **Name of Primary Cardholder** field.

PCH 1

And type the Primary Cardholder's name: Rose Dale.

<no audio> Type: Rose Dale into the **Name of Primary Cardholder** field.

Next Section

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**.

Other

We are required to type a reason.

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

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

No Email

In this scenario, our Primary Cardholder 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.

Click the "Click if unable to capture Primary Cardholder's signature" checkbox.

<no audio> Click the checkbox.

Reason

Second step, select our reason why we were unable to collect the Primary Cardholder's signature.

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

Other Reason

We only have the two options: Primary Cardholder 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...

Reason 1

...so we'll select that.

<no audio> Select **Primary Cardholder does not have access to email**.

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.

So, click the Yes radio button indicating, as the CPA: we have reviewed this form before submitting.

Submit

Go ahead and submit the form by clicking the Submit button.

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

Transition Slide

<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.

Transition Slide

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

PDF Option #1

Before we close the survey, we have two options for obtaining the PDF version of this form that we will want to scan into each household member's folder.

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.

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.

Email Confirmation

The email should arrive within 1 to 5 minutes.

When we open it...

<no audio> Double-click on the email
...we can see that the PDF has been attached.

Transition Slide

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

Signature in Clinic

Our second scenario is based on the Primary Cardholder 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 the capture signature screen, **OR our agency chooses** to collect the Primary Cardholder's signature at the next in-clinic visit after a remote visit where the Primary Cardholder 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 visits (for example: "TeleWIC visit" and our initials).

Scenario 2

For this scenario, we are going to follow-up a remote visit and, because our agency chooses to do so, collect the PCH's signature at their next in-clinic visit.

<display> *Alert: Please collect PCH sig on manual register form at next in-clinic visit. - JD*

Date

The date for the form should still be the current date, since that is the date we are collecting the signature.

<display> Today is July 1, 2020.

Go ahead and click the Today button.

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

<display> *Date = 7/1/20*

Required Fields 1

Since we're already familiar with the other required form fields we'll just quickly fill those in.

<display> *Household ID = 12378945*

<display> *Card Number = 9300000137*

<display> *Primary Cardholder = Cari Bou*

<display> *transitions to next section of form.*

Let's click the Reason for Register drop-down.

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

Follow-up

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**.

The instructions in the CPA section don't apply because it doesn't matter if our primary cardholder has access to email.

They can access our screen and using 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.

Signature

<display> *Screen scrolls down to Primary Cardholder section with Add Signature link.*

The instructions in the Primary Cardholder 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 ourselves.

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.

Sign Guidance

<display> *I am going to have you sign your name, as the Primary Cardholder for this WIC Card, on my computer using this mouse.*

<no audio> Click when ready to continue.

Sign FN

<display> *Signature: Cari*

Sign LN

<display> *Signature: Bou*

Save Signature

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

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

Verification 1

<display> *Screen scrolls to display both Submit and Save & Return Later button.*

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

Go ahead and complete it.

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

Submit 1

And we can submit the form.

<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> *PDF displays.*

PDF

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

<no audio> Click when ready to continue.

<display> *Bottom half of first page of PDF displays.*

<no audio> Click when ready to continue.

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

<no audio> Click when ready to continue.

Transition Slide

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

Remote Signature

Our last scenario occurs when the Primary Cardholder 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 PCH currently has access to their email, which means we can actually obtain the PCH's signature during the appointment.

Best Practice

Before assigning the Primary Cardholder, 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.

Transition Slide

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

Scenario #3

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

<display> *Screen scrolls down to Reason for Register field.*

Reason 2

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**.

The directions in the next section, CPA, read: if the Primary Cardholder currently has access to their email, click the "Save & Return Later" button.

<display> *Form scrolls to bottom.*

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 Primary Cardholder'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 Primary Cardholder 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 Primary Cardholder'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.

Close Email Sent

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 Primary Cardholder through.

Transition Slide

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

Instructions

For this, let's use the instruction document...

We want to let our Primary Cardholder 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's 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.

PCH Form

Once the Primary Cardholder has received the email, have them open it.

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

Have them click (or tap) the **Primary Cardholder Signature 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 "Primary Cardholder Signature Register – Minnesota WIC".*

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

Next, have them scroll down and click or tap the **Add Signature** link.

<display> *Now, scroll down to the Add Signature link and click or tap on it.*

Add Signature

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> *Using your mouse, or finger, sign your name on the line.*

Next, have them scroll to the very bottom of the form and click the Save & Return Later button.

<display> *Done? Super. Go ahead and click or tap the Save Signature button.*

<display> *Next, I'm going to have you scroll to the very bottom of the form...*

<display> *...and click or tap the Save & Return Later button.*

Message

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.

<display> *Oh! No worries! Just click the Okay button...*

<display> *...and scroll to the bottom of the form and click the **Save & Return Later** button this time.*

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

<display> *And your part is done! Thank you! You can close the browser window.*

Transition Slide

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

Continue Survey

<display> *I'm just going to quickly finish my part of the form.*

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

Refresh Email

We should note, if we sent an email to ourselves and were walking through the form with our Primary Cardholder, 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

Scrolling down, we can see the form now has the Primary Cardholder's signature.

To complete the form, we simply click the **Yes** radio button 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...

<display> *Top-half of page 1 of form.*

<display> *Bottom-half of page 1 of form.*

<display> *Top-half of page 2 of form.*

Transition Slide

<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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