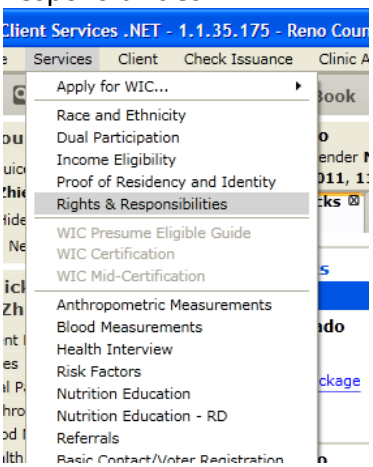
Electronic Signature Training

Signatures may be captured electronically for the following forms:

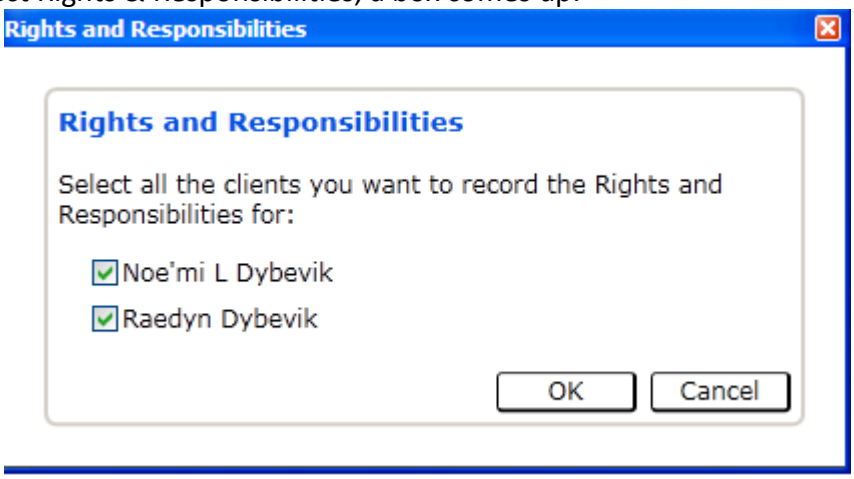
- Rights & Responsibilities (R & R)
- Check stubs
- Self-Declaration of Income (includes Zero Income)
- Breastpump User Agreement

Rights & Responsibilities Form

✓ After opening the family group you are certifying, go to Services and select Rights & Responsibilities.

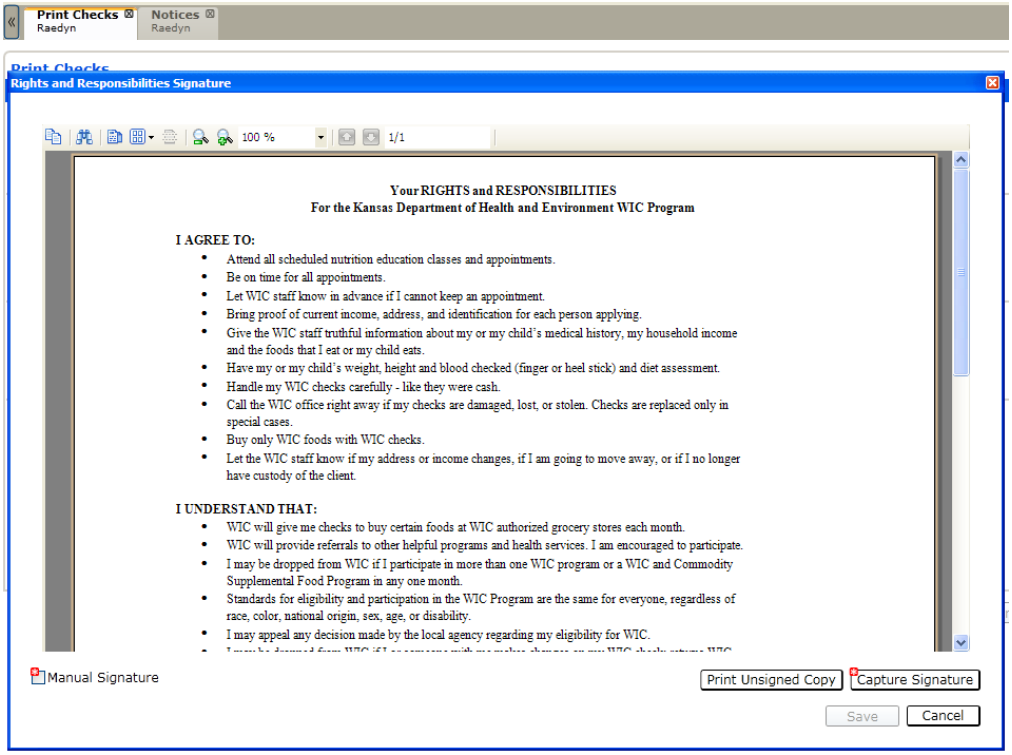


✓ When you select Rights & Responsibilities, a box comes up:

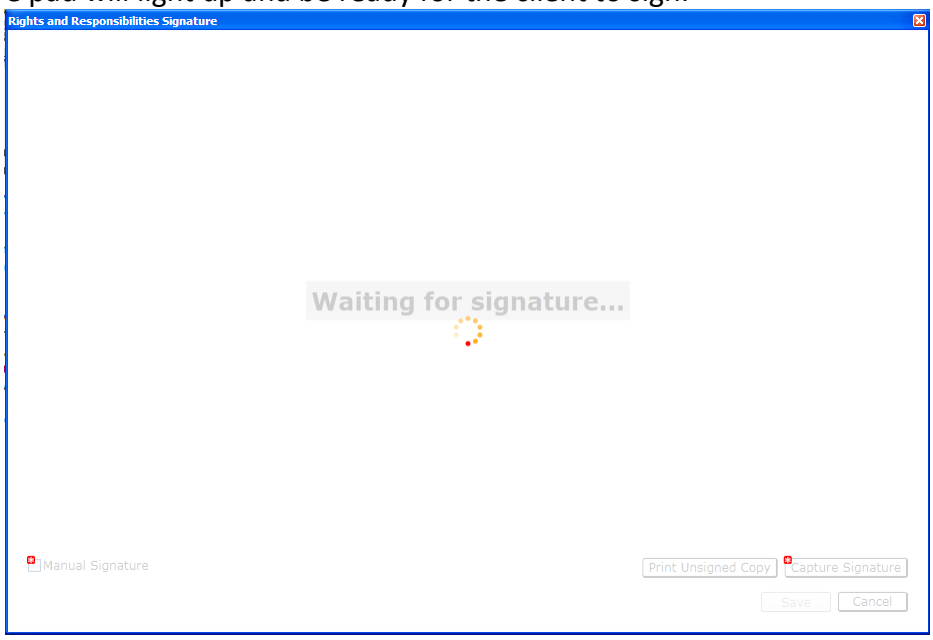


✓ This pop up box defaults to all clients in the family group.

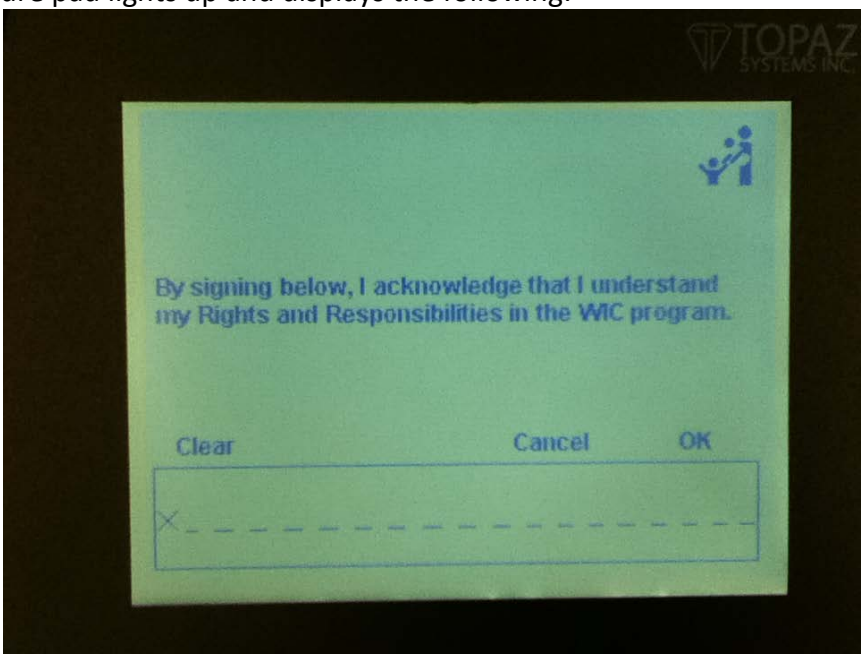
✓ The next screen will let you either capture the client's signature or indicate the form will be signed manually. You have to check either Manual Signature or Capture Signature on this screen.



✓ After clicking Capture Signature, your screen will change to the following display and the signature pad will light up and be ready for the client to sign.



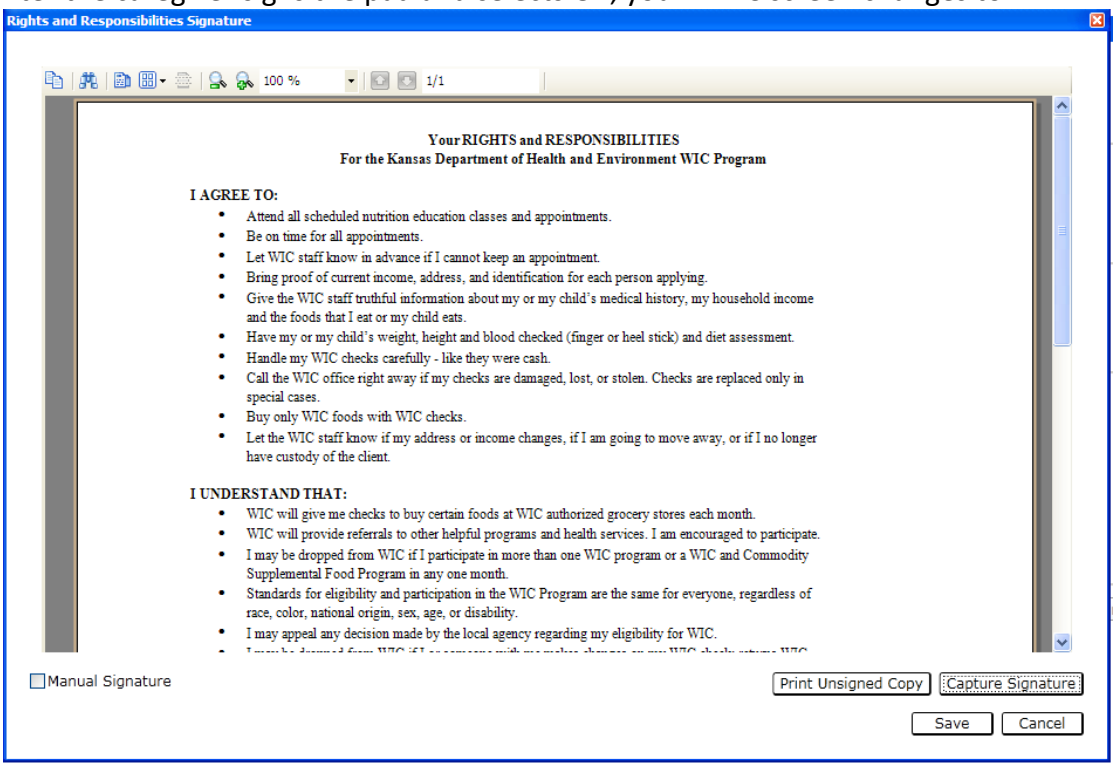
✓ The Signature pad lights up and displays the following:



The Signature Pad displays a Signature Box as well as Clear, Cancel and OK buttons

- Clear – Clears the signature box
- Cancel – Cancels signature and returns computer display to the form
- OK – Accepts signature and displays it on the form on the computer display

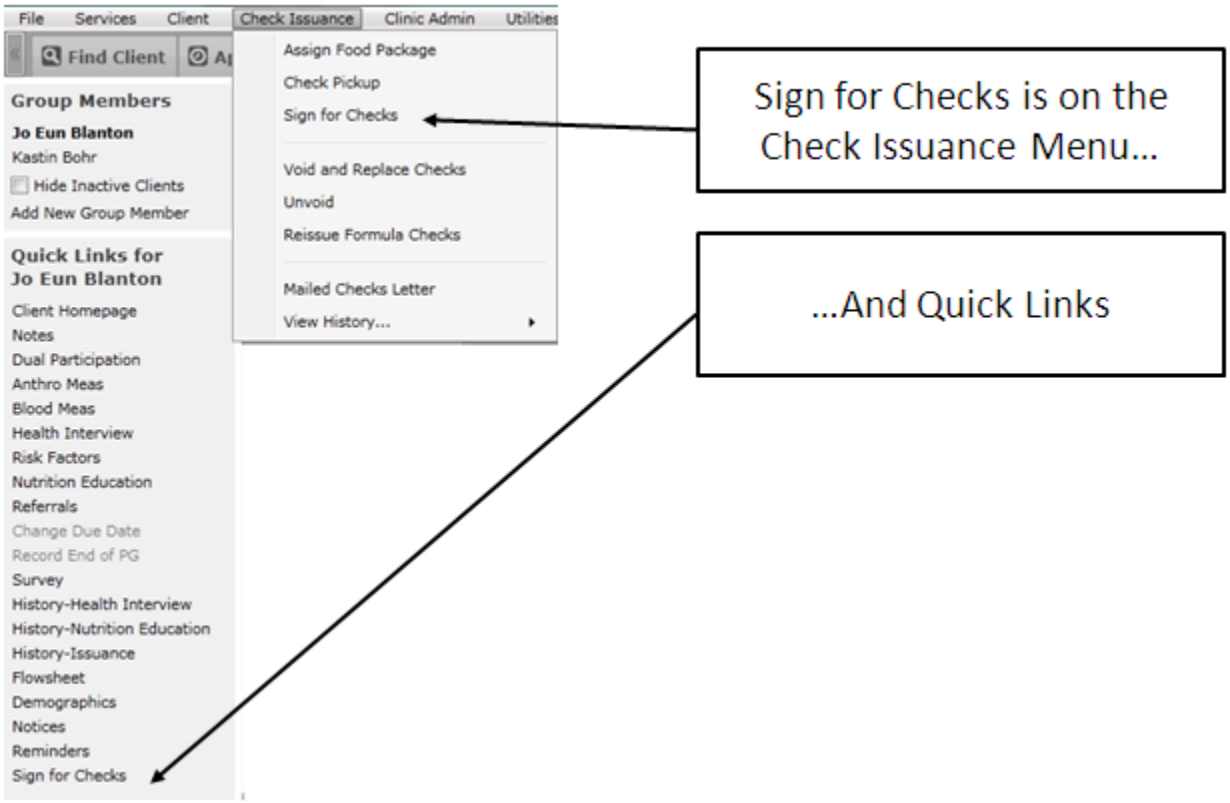
✓ After the caregiver signs the pad and selects OK, your KWIC screen changes to:



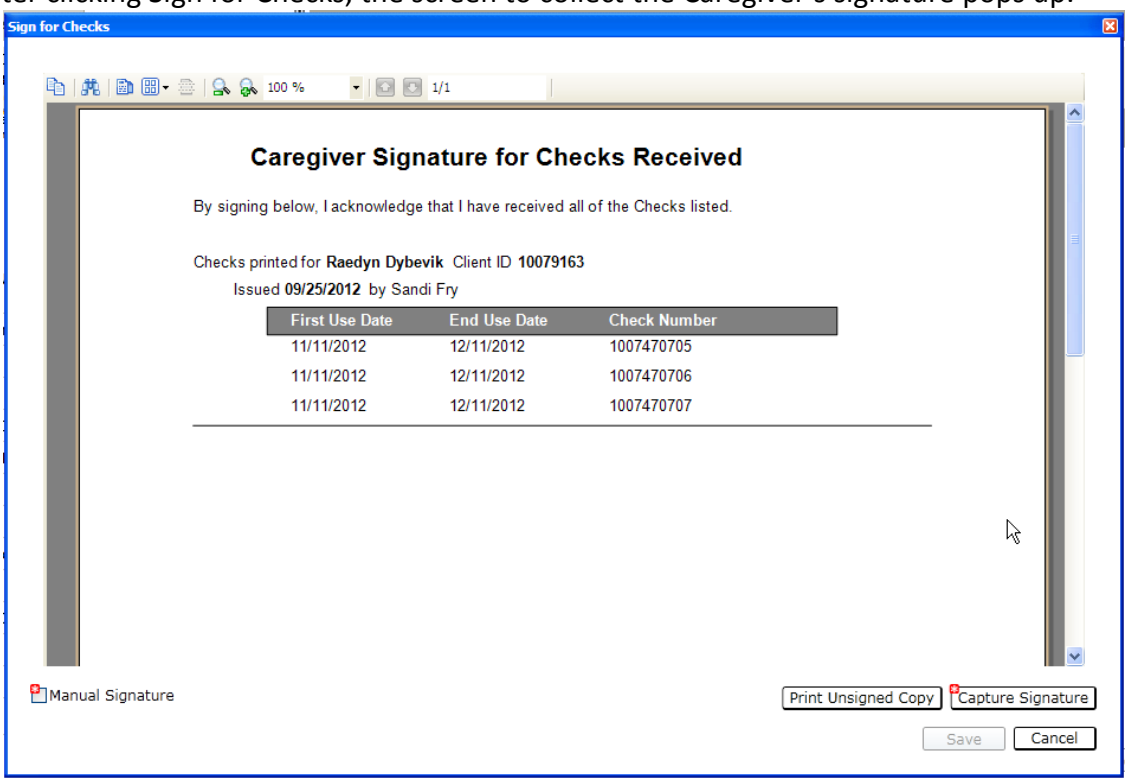
✓ You can scroll down to view the signature and then click "Save" to save the signature.

- ✓ The Rights & Responsibilities form must be signed prior to checks being printed. KWIC won't allow checks to be printed without a signed R & R. Once an R&R has been signed (either manually or electronically) it will allow you to print checks.

- ✓ After printing the checks, the client must **Sign for Checks**, which is located at the bottom of the Quick Links or under the Check Issuance menu.



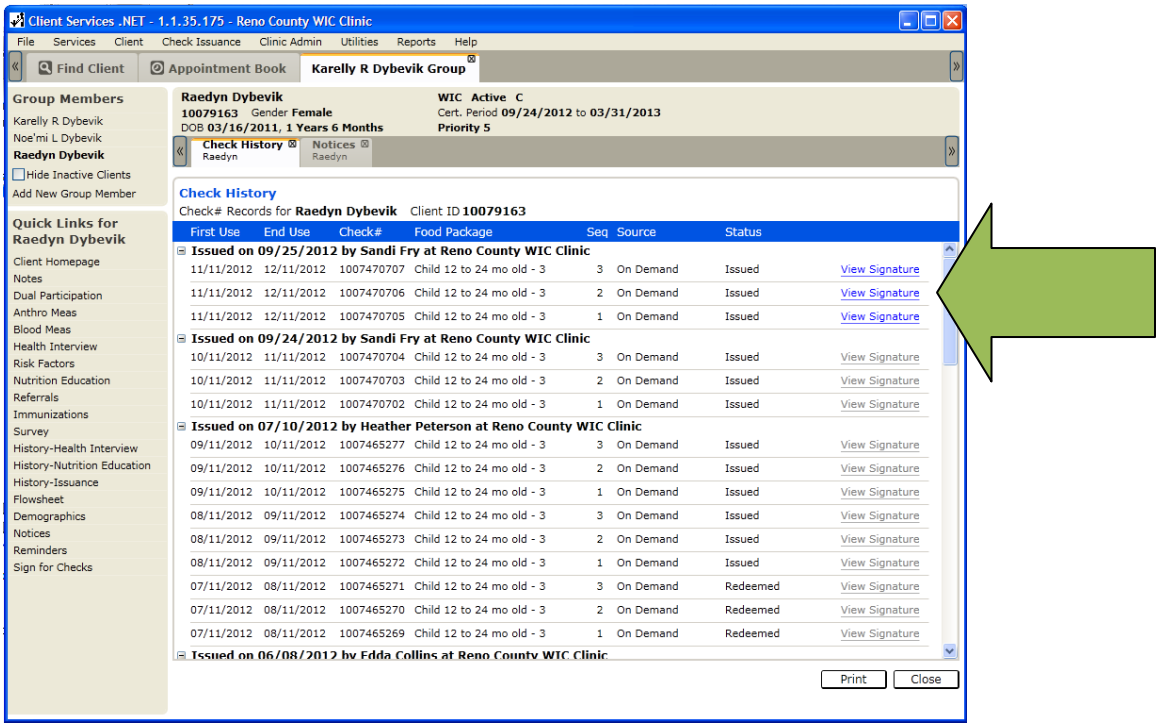
- ✓ After clicking Sign for Checks, the screen to collect the Caregiver's signature pops up.



- ✓ If you have a signature pad plugged into your machine, you will be able to choose either Capture Signature or Manual Signature on the screen.

- ✓ Follow the same process as the R & R to collect the electronic signature.

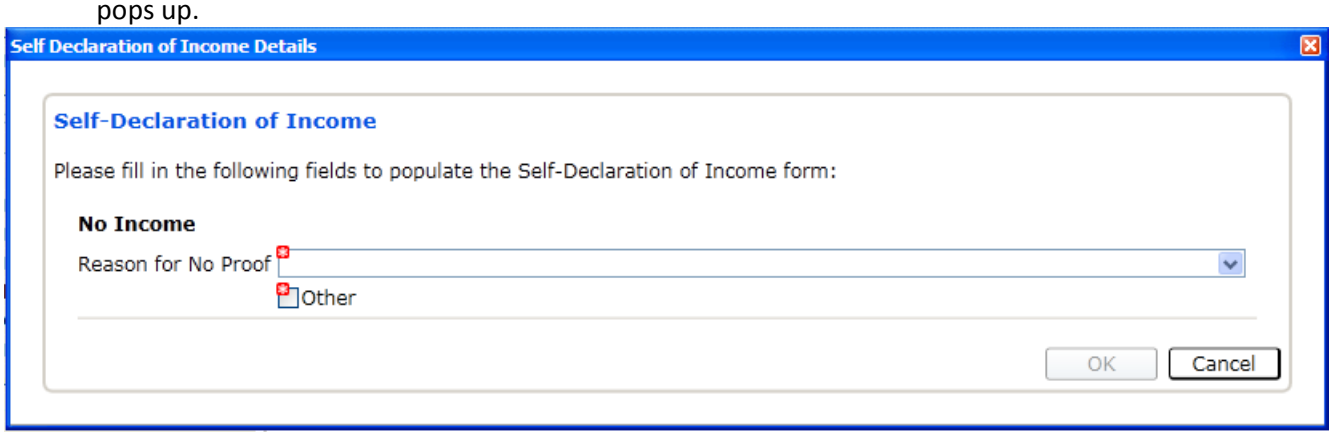
- ✓ To see a history of signed checks go to Check Issuance > View History > Checks



- ✓ If the checks are signed for electronically, you may shred the check stubs. If signed manually, retain the signed stub as you do now.

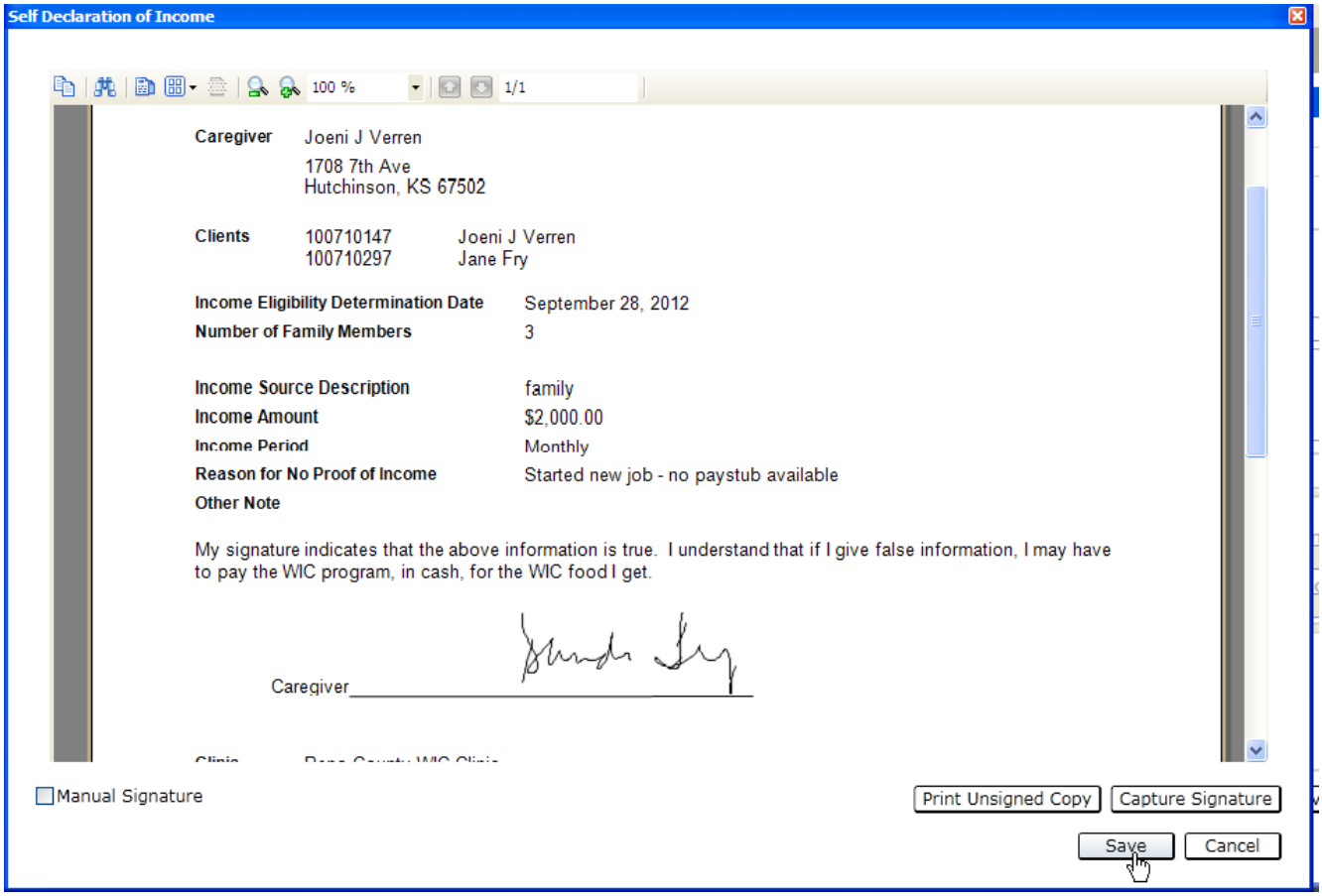
Self-Declaration of Income (includes Zero Income)

- ✓ After checking the Self-Declared or Zero Income box and saving the income screen the following box pops up.

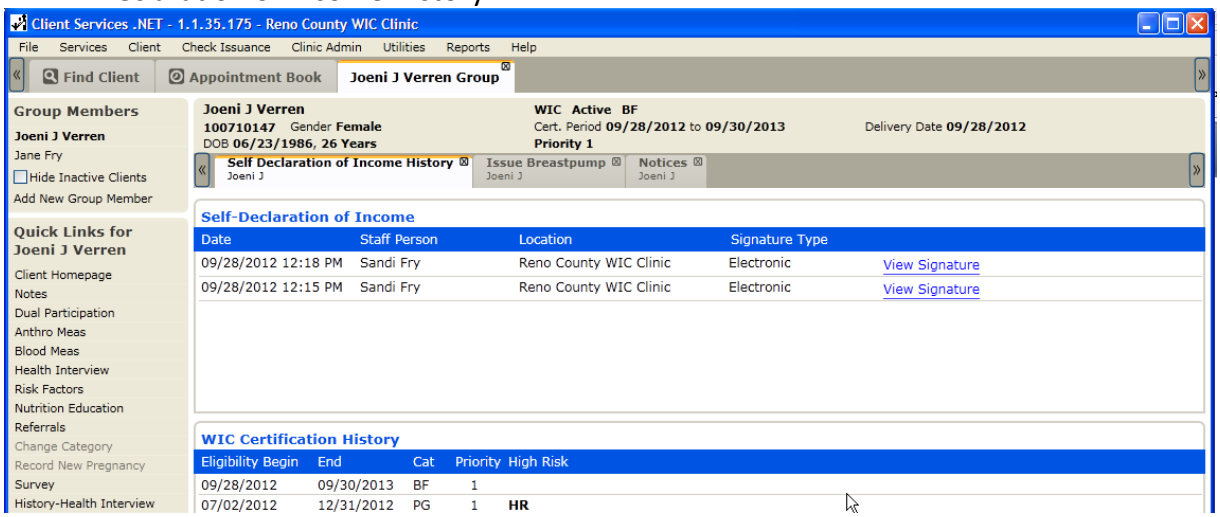


- ✓ You must either select a Reason for No Proof from the drop down or if there is not an appropriate selection in the drop down, you can select other. If you select Other, a note is mandatory.

✓ After collecting the signature, click Save.

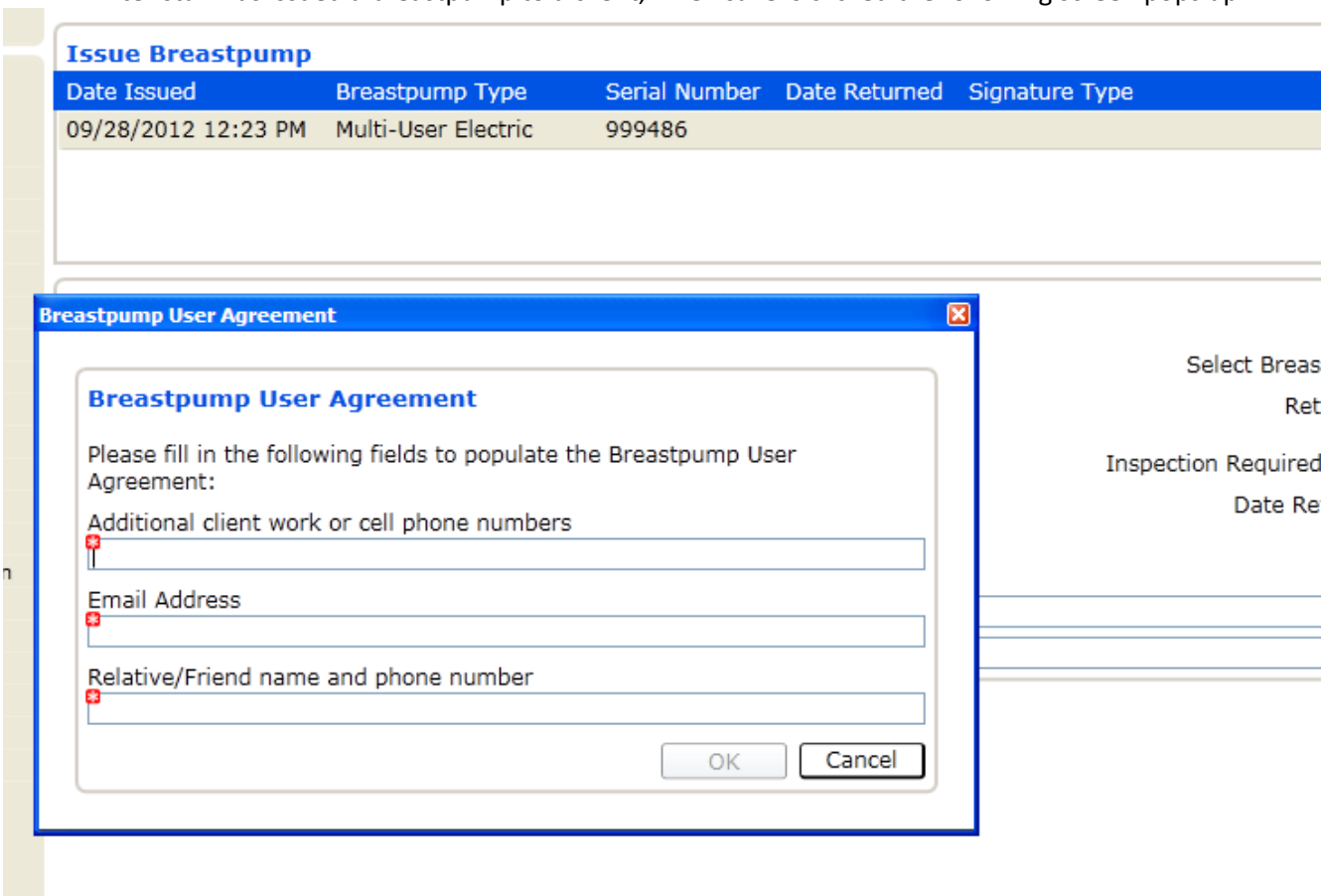


✓ To see past signed Self-Declaration of Income forms go to Client > View History> Self-Declaration of Income History

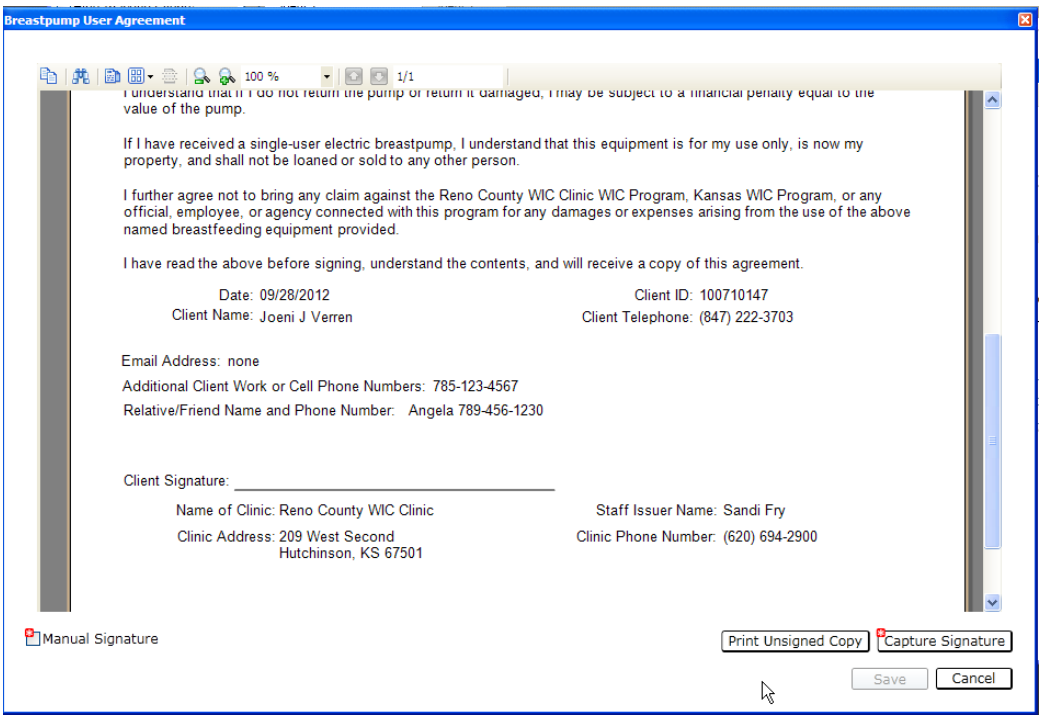


Breastpump User Agreement

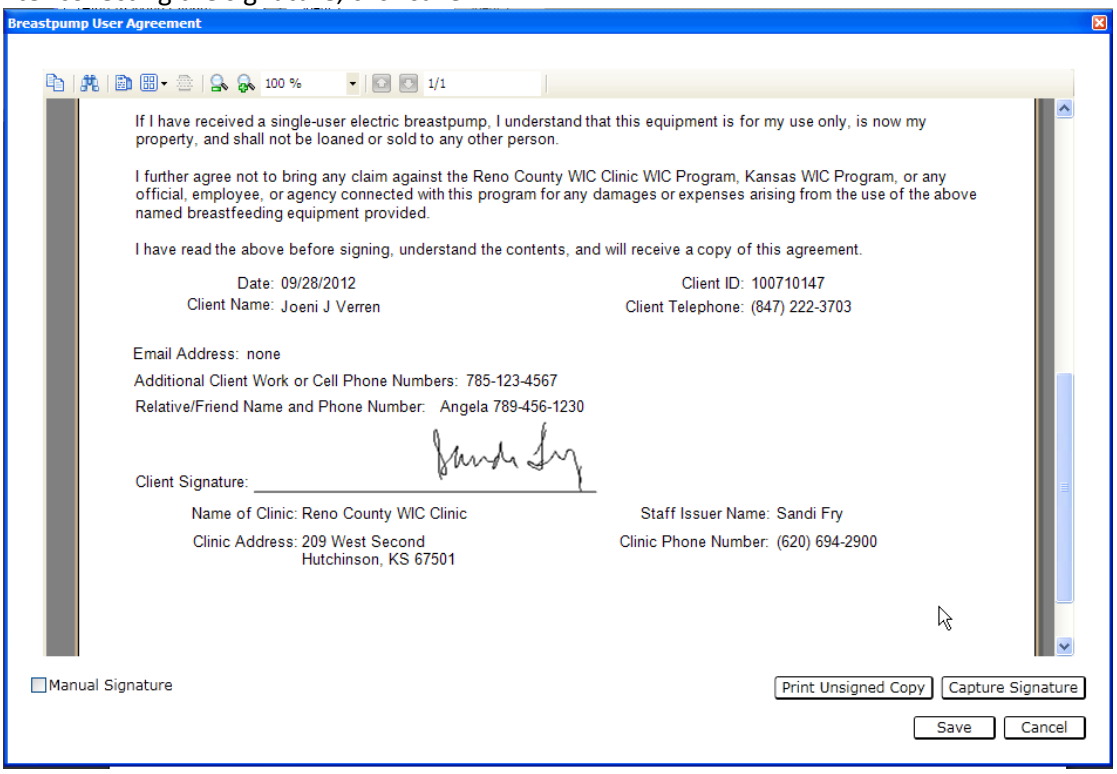
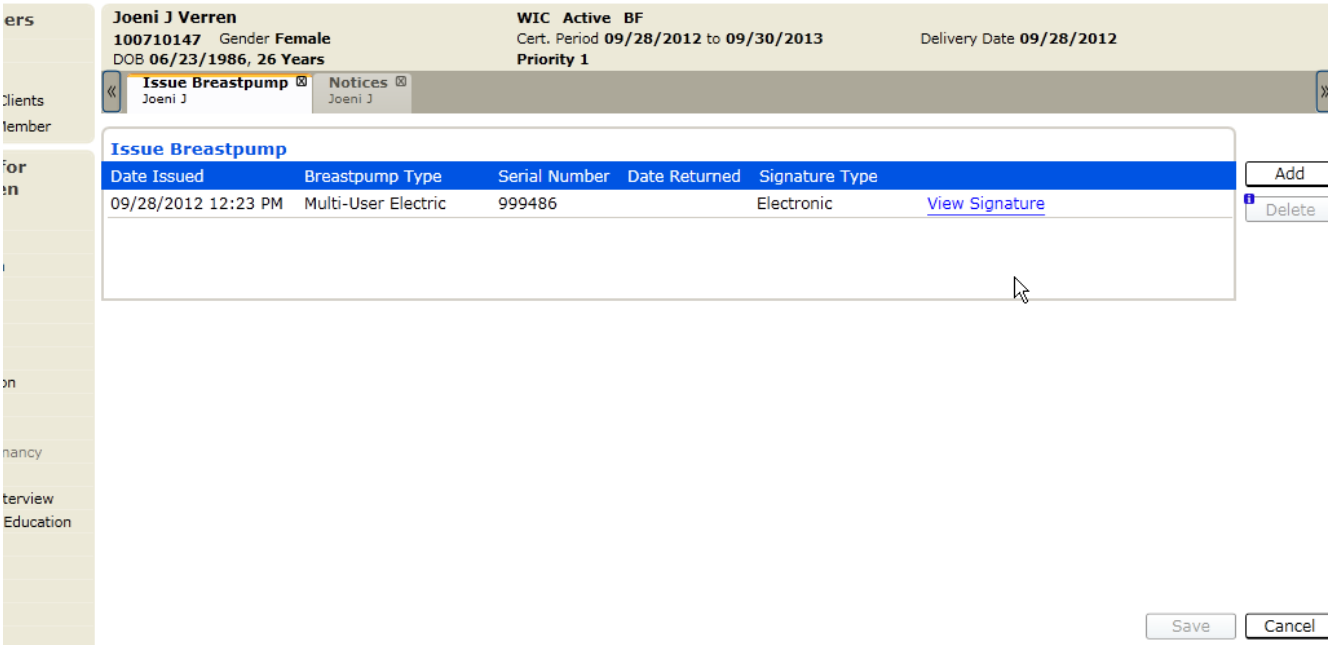
- ✓ After staff has issued a breastpump to a client, when save is clicked the following screen pops up.



After filling in the pop up screen, OK is enabled and the completed agreement pops up and you can scroll to see the information you typed in. All fields are required so if the Client does not have an email address, write none.



✓ After collecting the signature, click save



✓ If you want to see the signed Breastpump User Agreement form, go to Client > Issue Breastpump and you can view the signed agreement from that screen.