

AGENT GUIDE – TAP & SIGN DIGITAL APPOINTMENTS

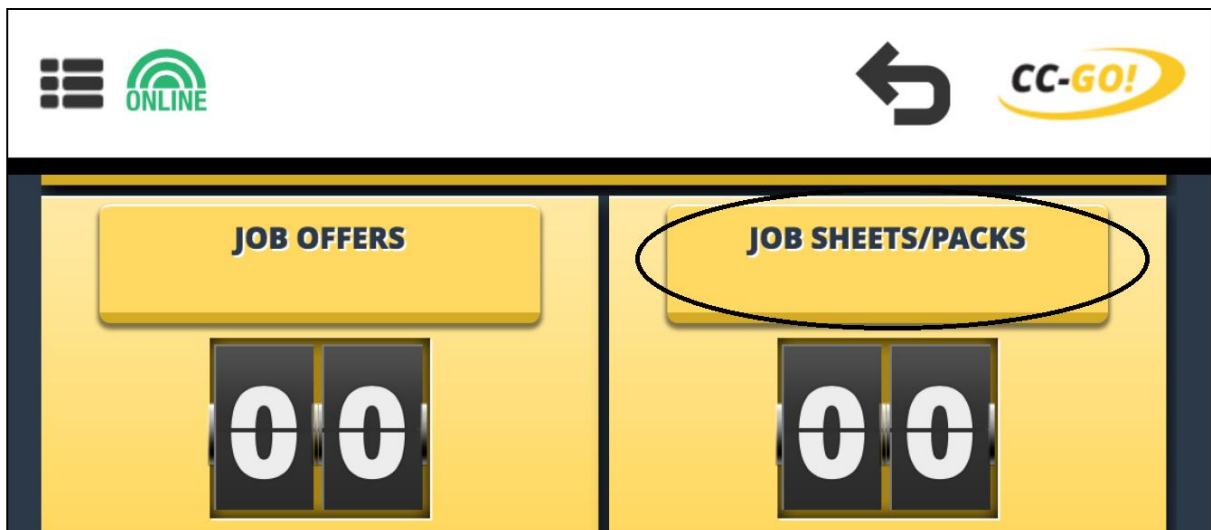
THIS IS A DIGITAL APPOINTMENT AND THEREFORE FIELD AGENTS WHO OWN A TABLET AND ARE TRAINED TO COMPLETE DIGITAL APPOINTMENTS WILL BE ALLOCATED THESE JOBS IN THE FIRST INSTANCE. ****PLEASE PRINT OFF A PAPER PACK & ALSO COMPLETE THIS UNTIL YOU ARE COMFORATBLE WITH THE PROCESS OR CAC CONTACTS YOU TO ADVISE PAPER PACKS ARE NO LONGER REQUIRED****

****IT IS NOT OPTIONAL WHETHER THE JOB IS COMPLETED DIGITALLY****

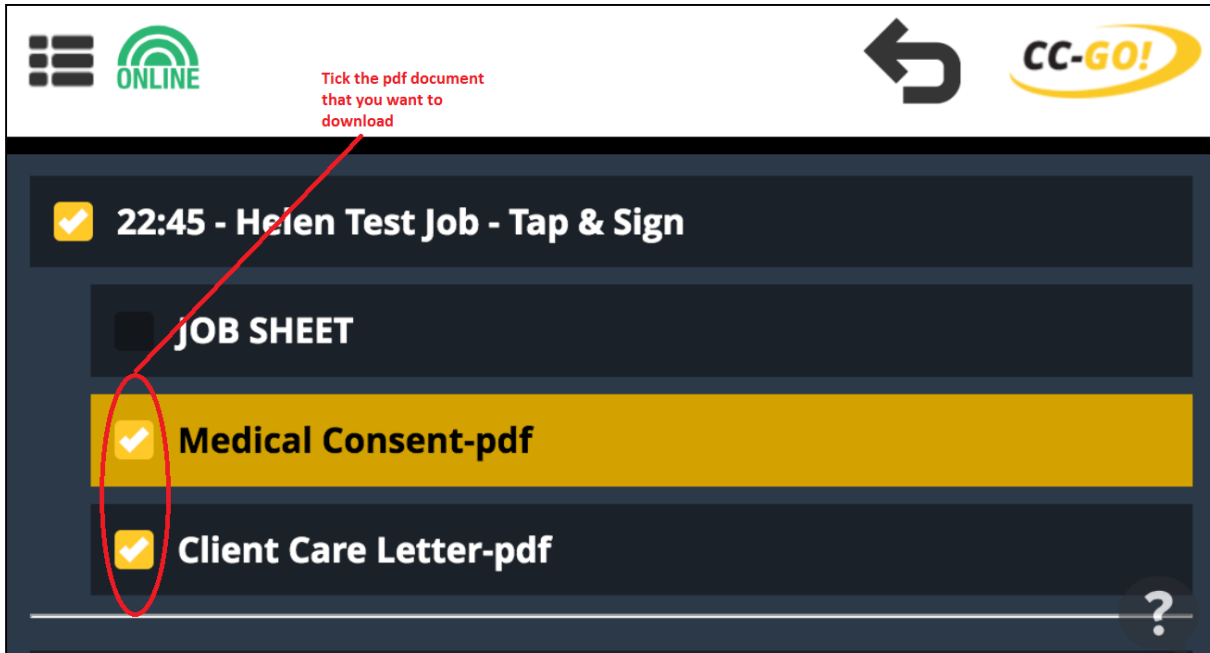
ANDROID DEVICE USERS MUST BE USING KITKAT OR LOLLIPOP VERSIONS OF ANDROID, ANYTHING OLDER WILL NOT ALLOW YOU TO DOWNLOAD THE PDF'S REQUIRED FOR THESE JOBS

IF YOU EXPERIENCE ANY TECHNICAL DIFFICULTIES, PLEASE CONTACT THE CAC OFFICE ASAP BEFORE PROCEEDING ON PAPER.

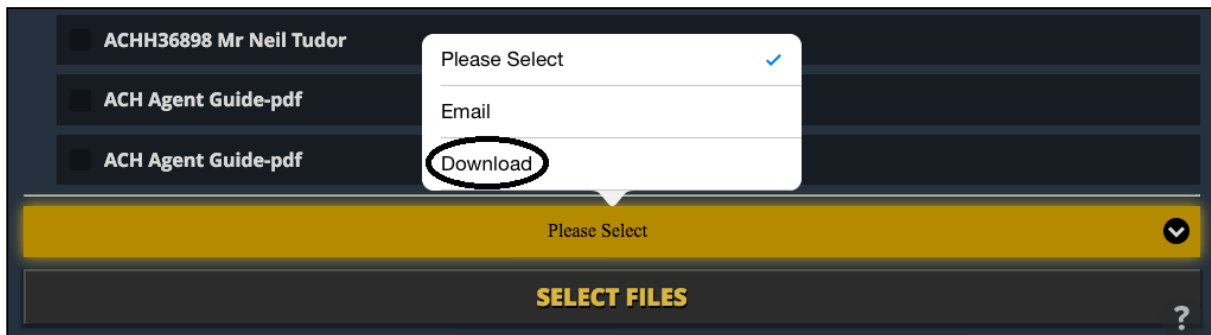
- 1. Firstly make sure you refer to the “GET TEMPLATES - AGENT GUIDE” If you have not already downloaded templates.**
- 2. Go to your Home Screen & select JOB SHEETS / PACKS**



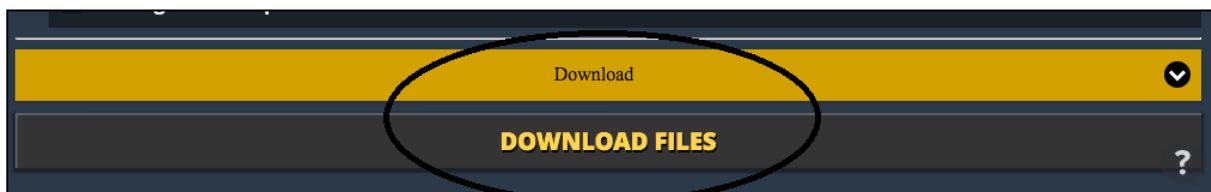
- 3. Scroll to find the Digital Job in question. Touch the screen to select the PDF's that require download, white ticks will appear in the box to the left as the PDF's are selected.**



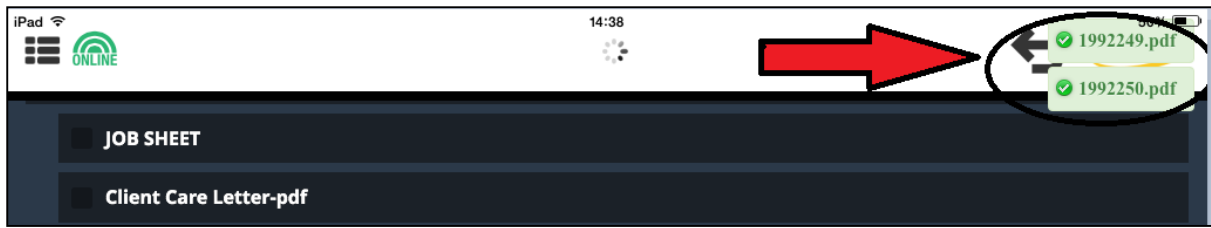
4. Scroll to the bottom of the screen



5. At the bottom of the screen, press on the "Please Select" bar which will then provide an option to Email or Download. Select "Download"



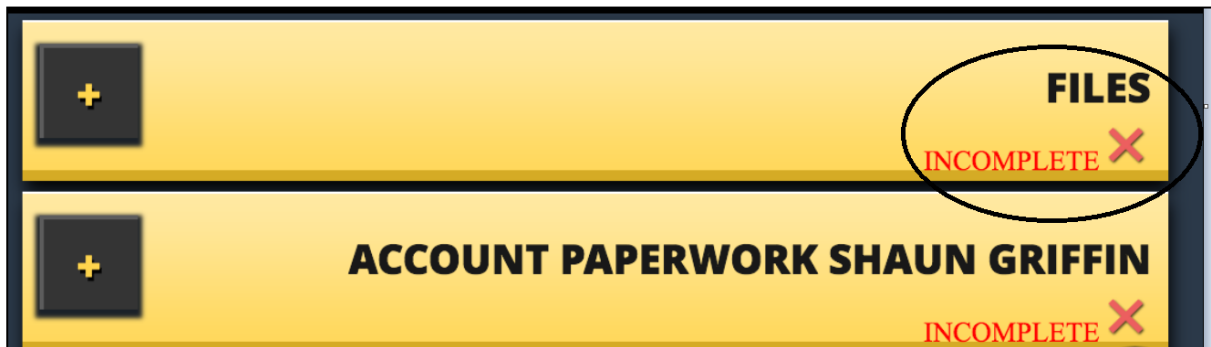
6. You will now see that the grey bar beneath states DOWNLOAD FILES. Press this button and it will turn yellow. The CC-GO! App will then download the selected PDF's for the Tap & Sign Digital job In question



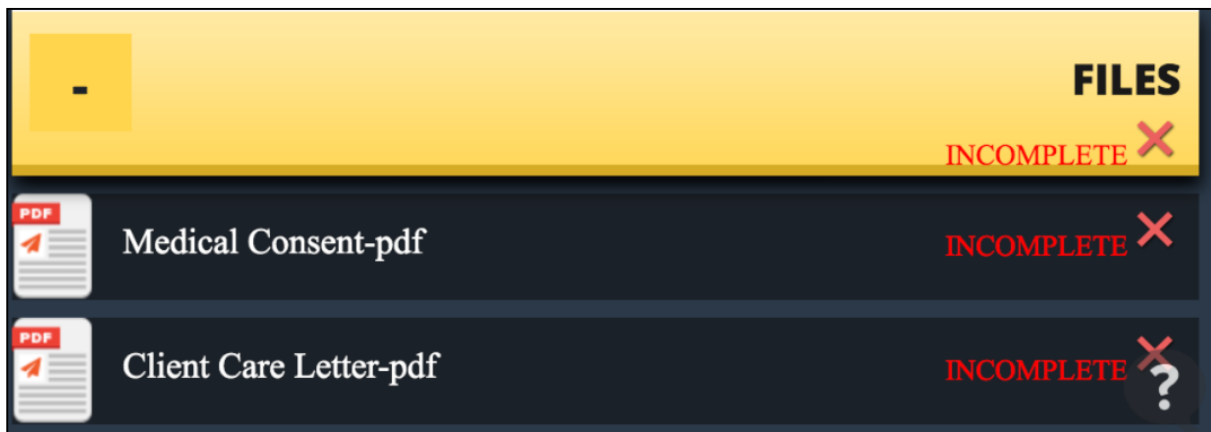
7. The PDF's you have downloaded will then appear in green in the top left hand corner of the screen. ENSURE YOU WAIT FOR ALL OF THE PDF'S TO DOWNLOAD, IF YOU SELECTED 4 DOCUMENTS MAKE SURE YOU WAIT FOR THEM ALL TO APPEAR – This may vary due to the size of each PDF. Once you are satisfied that all of the selected PDF's have downloaded, go back to your Home Screen.

NEW SECTION - FILES:

1. Go into APPOINTMENT OUTCOME and then into the Digital job in question, you will see a new section named FILES.



2. When you go into FILES you will see the PDF's you have downloaded (below)



3. When you select one of the PDF's by touching the screen the PDF will open for you to complete with the Customer.

TO COMPLETE A DIGITAL TAP & SIGN JOB:

1. Go in to a PDF via the FILES section on the Tap & Sign job. The PDF will appear as a digital version of the Account Paperwork.
2. Tap the screen where you want to add data. **DO NOT TAP ON TEXT, TAP IN THE SPACE ABOVE THE LINE** & a pop up will appear headed DATA TYPE.
3. If you press the yellow box named "Please Select" a further pop out will appear with different data type options; Text, Number, Date, Signature & Placed Data.

The image shows a digital form with a pop-up menu for selecting data types. The background form has the following fields:

- Our ref: []
- NAME IN FULL: [IN] [] [RT] (with a small input box containing "Helen")
- DATE OF BIRTH: []
- ADDRESS AND (e the accident): []
- TELEPHONE N (506870): []
- HOSPITAL ATTEN (consultant attending) gi: []
- DID YOU HAVE ANY: []
- GP DETAILS(name and address, required even if you have not attended your GP): [South Park surgery]

The pop-up menu is titled "Please Select" and has a blue checkmark icon. It lists the following options:

- Text
- Number
- Date
- Signature
- Placed Data

Below the pop-up menu, there is a yellow button labeled "Please Select" with a downward arrow, and a black button labeled "PLACE".

- As you type in the text box, the text appears where you originally tapped the screen. Once you have completed the text, press the PLACE button. The pop up will then disappear & the text will remain on the screen. The text can then be positioned onto the line as required. **DO NOT PLACE TEXT OVER TEXT AS IF THE TEXT IS OVERLAYED IT CANNOT BE MOVED & YOU WILL HAVE TO DELETE THE TEXT & START AGAIN.**

A screenshot of a form with several text input fields. The first field is labeled "NAME IN FULL (including former name if changed since the accident)" and contains the text "Mr Jon Doe", which is circled in black. Below it are fields for "DATE OF BIRTH" and "DATE OF ACCIDENT". The next field is "ADDRESS AND POSTCODE (including former address if changed since the accident)". Below that is "TELEPHONE NUMBER". The next field is "HOSPITAL ATTENDANCE (including name of consultant attending) given by" and contains "Mr Jon Doe". Below that is "DID YOU HAVE ANY". A pop-up menu titled "DATA TYPE:" is overlaid on the form. It has a yellow bar with "Text" and a dropdown arrow. Below the bar is a text input field containing "Mr Jon Doe". At the bottom of the pop-up is a dark grey button with the word "PLACE" in yellow.

- If you want to add data that you have already input, select the data type "Placed Data". A pop up will then produce a yellow "Please Select" bar, press this bar and a list will pop out with the data you have already placed on that particular PDF. If you select the data that you want to place again i.e. the Customers address & then press place, the data will be duplicated without the need to retype the information.

- To add a date, tap the screen as before. This time select the data type "Date".

A screenshot of a form with several text input fields. The first field is labeled "Collect a Case" and contains the date "2015-04-15". Below it are fields for "TELEPHONE NUMBER" and "HOSPITAL ATTENDANCE (including name of consultant attending) given by". The next field is "DID YOU HAVE ANY". Below that is "GP DETAILS (name and address of GP who attended your GP)" and contains "South Park Surgery". A pop-up menu titled "Please Select" is overlaid on the form. It has a yellow bar with "Please Select" and a dropdown arrow. Below the bar is a list of options: "Please Select", "2015-04-18", and "Collect a Case". The "Collect a Case" option is circled in red. At the bottom of the pop-up is a dark grey button with the word "PLACE" in yellow.

7. A scroll bar will appear allowing you to pick the correct date. Once you have the correct date, press PLACE & the pop up will disappear allowing you to position the date on the appropriate line.

Our ref:

INFORMATION REQUIRED FOR MEDICAL REPORT

NAME IN FULL (in nt)
Mr Jon Doe Clear

DATE OF BIRTH
15 October 1976
16 November 1977
17 December 1978
18 January 1979
19 February 1980
20 March 1981
21 April 1982

ADDRESS AND PC (since the accident)

TELEPHONE NUM
.....

HOSPITAL ATTEN (number and the name of
consultant attending) gi
.....
.....

DID YOU HAVE ANY

18 Jan 1979

PLACE

8. If the PDF requires a signature, tap the screen where you want the Customer to sign & select Signature as the data type. A large rectangular box will then appear & you will be asked to rotate your tablet to landscape. The Client is to sign within the box and fill the box as best they can. If the signature isn't acceptable, press RESET, if it is acceptable press ACCEPT.

Signature

Jon Doe

RESET **ACCEPT**

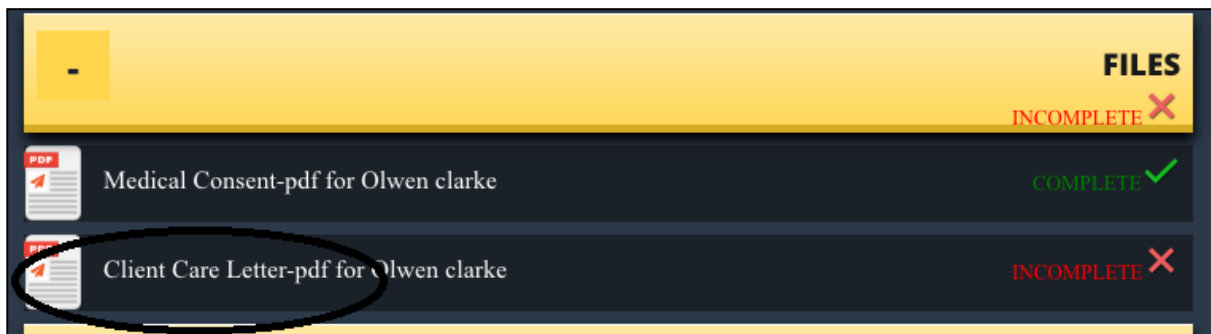
HOSPITAL ATTENDED (if known please give record number and the name of

9. The signature will appear where you originally tapped the screen & as before you can position it. As you have added a signature, a green box at the top of the screen will appear to state "Click to place date or click CANCEL". If you'd like to add an associated date to the signature you have just added, tap the screen where you'd like to place the date. If you do not want an associated date with the signature, press the cancel button within the green pop up at the top of the screen.

10. If you do not press the CANCEL button the date appears where the screen was tapped. This date is now associated to the signature you added.

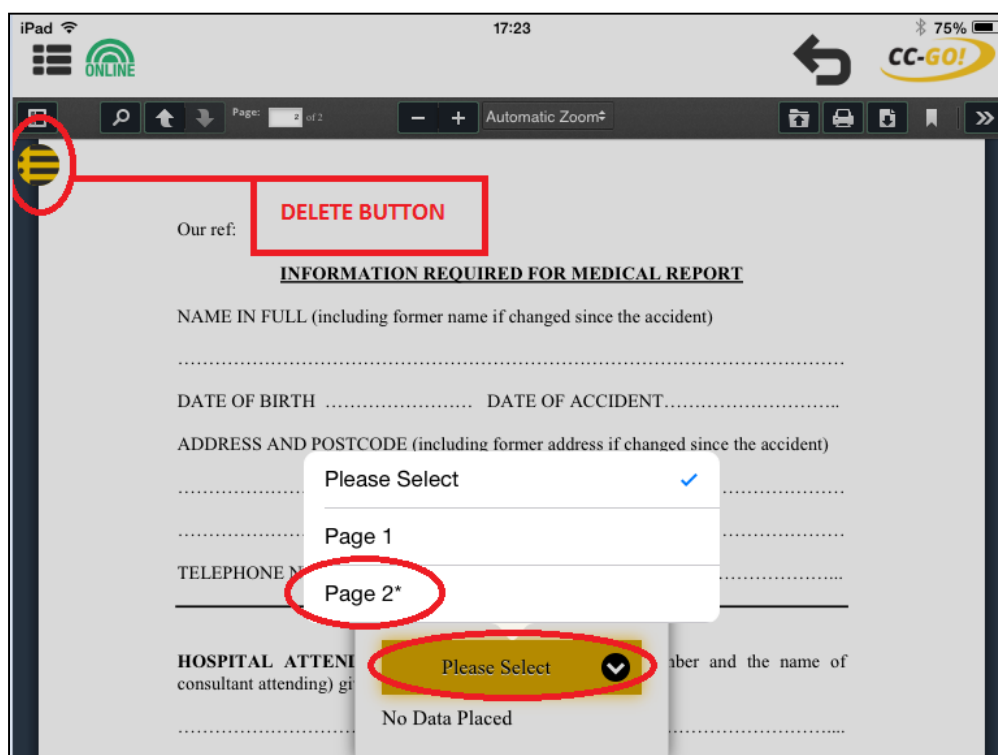
SIGNED DATE.....

11. Once you are satisfied that you have completed all of the required fields on the PDF, press the back button on your CC-GO! App / tablet which will take you back to your Document Request screen. Go back into FILES & complete any other PDF's associated with the Tap & Sign job.



HOW TO DELETE:

1. On the top left of your screen you can see a yellow & black circle, this is the Delete button. If you press this, a pop up will appear which states in yellow "Please Select". If you press "Please Select" another pop up will appear advising how many pages there are to this particular pdf, In this case the Medical Consent has 2 pages. The first page of the pdf didn't require data to be added but the second did. As there is data on page 2, a * (star) appears next to the page number.



2. If you select the page with the *(star) then a list of all of the data will appear. You are able to select the data you'd like to delete using the minus buttons that appear to the left of the text

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TELEPHONE NUMBER

HOSPITAL ATTENDING (name and the name of consultant attending) given

DID YOU HAVE ANY

GP DETAILS (name and

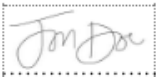

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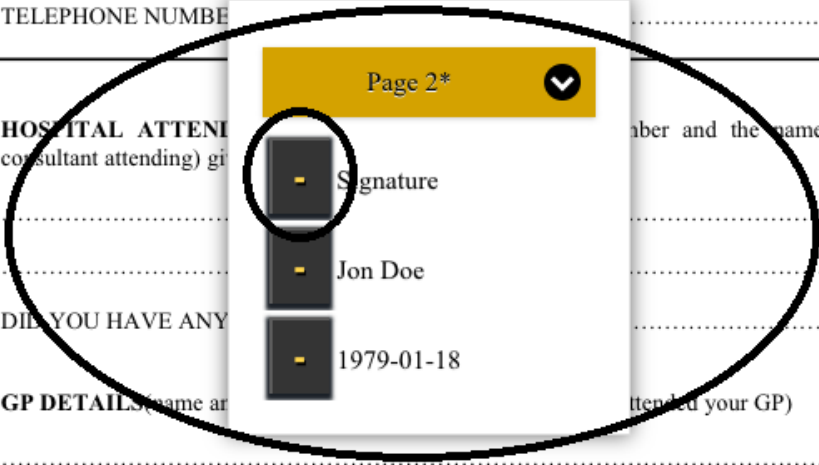
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CONSENT FOR RECORDS

I consent to the release to my Hospital records, GP records and X-rays

I confirm that no legal proceedings are intended against my G.P. or the Hospital in respect to this request

SIGNED  DATE 



3. The selected data then disappears

CONSENT FOR RECORDS

I consent to the release to my Hospital records, GP records and X-rays

I confirm that no legal proceedings are intended against my G.P. or the Hospital in respect to this request

SIGNED DATE.....

