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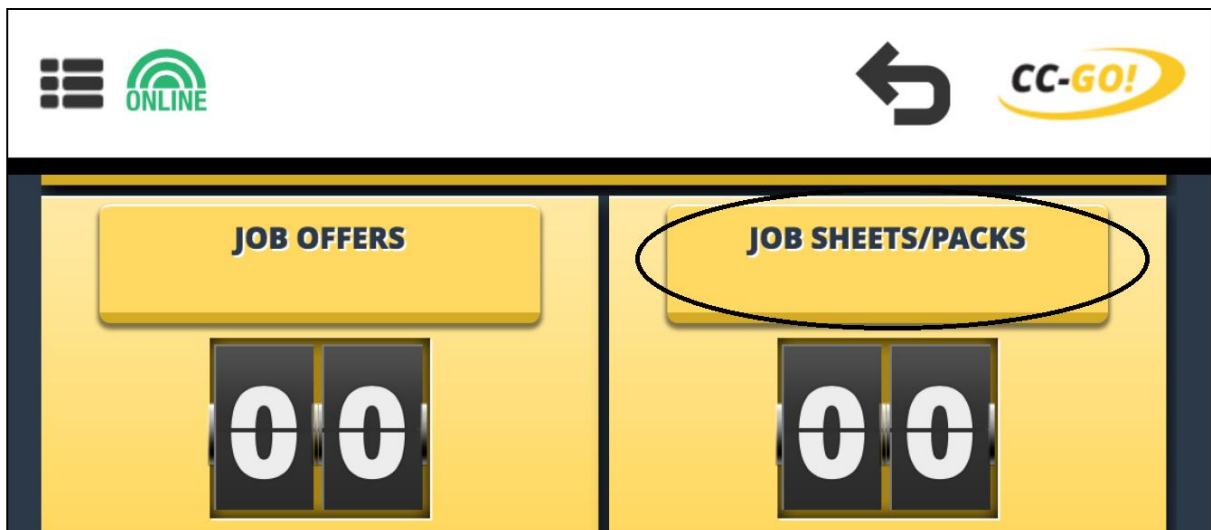
3. Scroll to find the Digital Job in question. Touch the screen to select the PDF's that require download, white ticks will appear in the box to the left as the PDF's are selected.

Tick the pdf document that you want to download
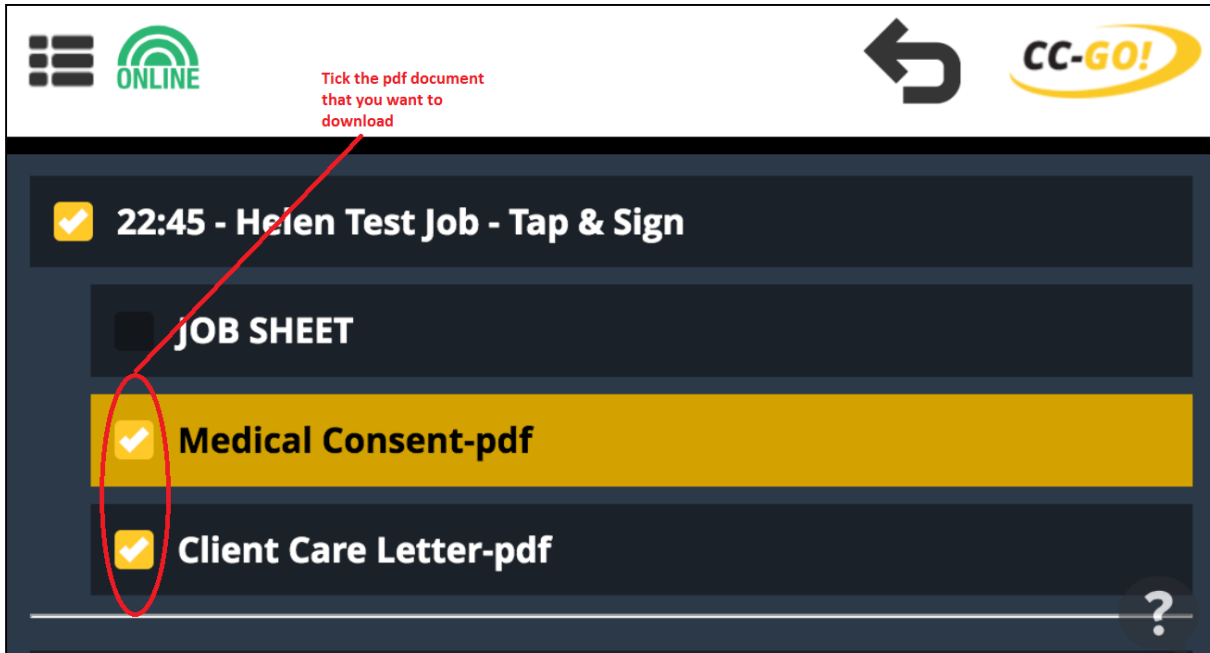
4. Scroll to the bottom of the screen
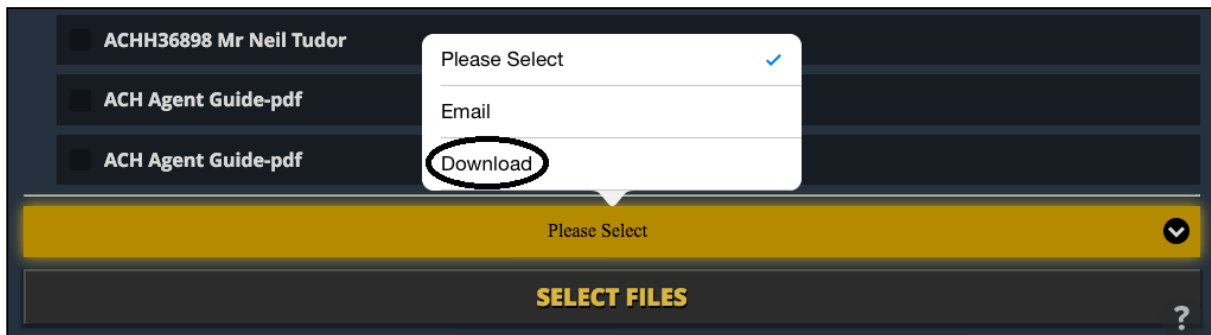
5. At the bottom of the screen, press on the "Please Select" bar which will then provide an option to Email or Download. Select "Download"
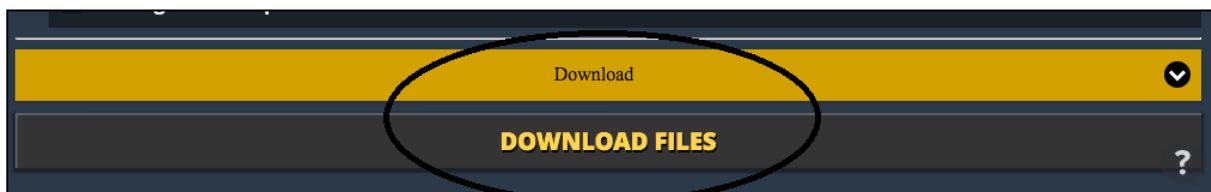

6. You will now see that the grey bar beneath states DOWNLOAD FILES. Press this button and it will turn yellow. The CC-GO! App will then download the selected PDF's for the Tap & Sign Digital job In question
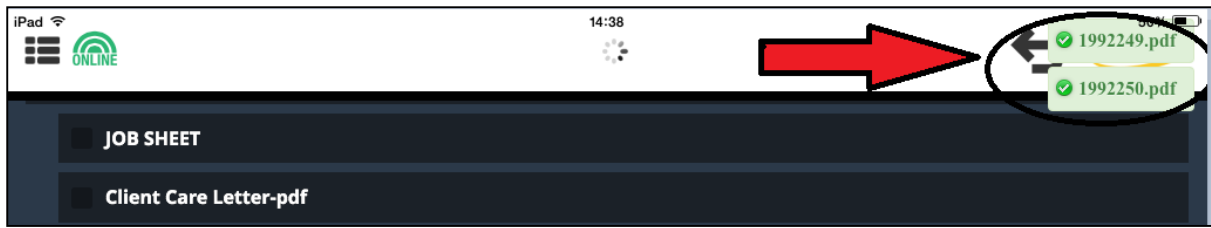
7. The PDF's you have downloaded will then appear in green in the top left hand corner of the screen. **ENSURE YOU WAIT FOR ALL OF THE PDF'S TO DOWNLOAD, IF YOU SELECTED 4 DOCUMENTS MAKE SURE YOU WAIT FOR THEM ALL TO APPEAR** – This may vary due to the size of each PDF. Once you are satisfied that all 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.
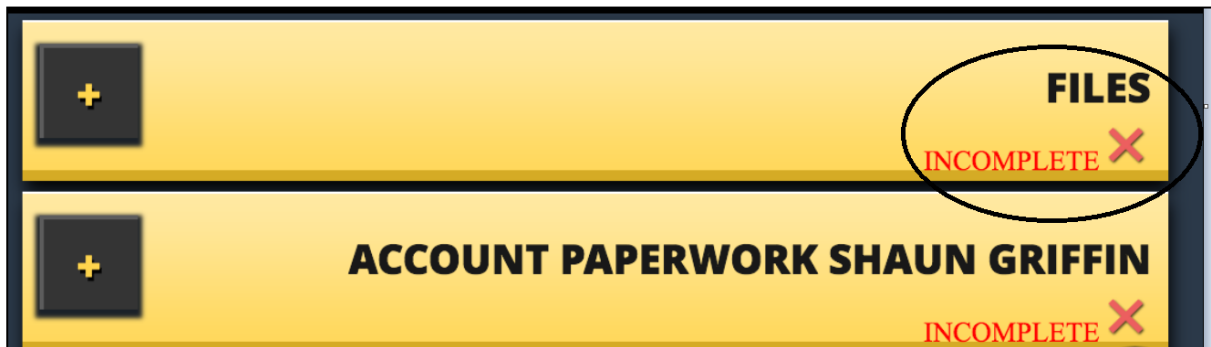
2. When you go into FILES you will see the PDF's you have downloaded (below)
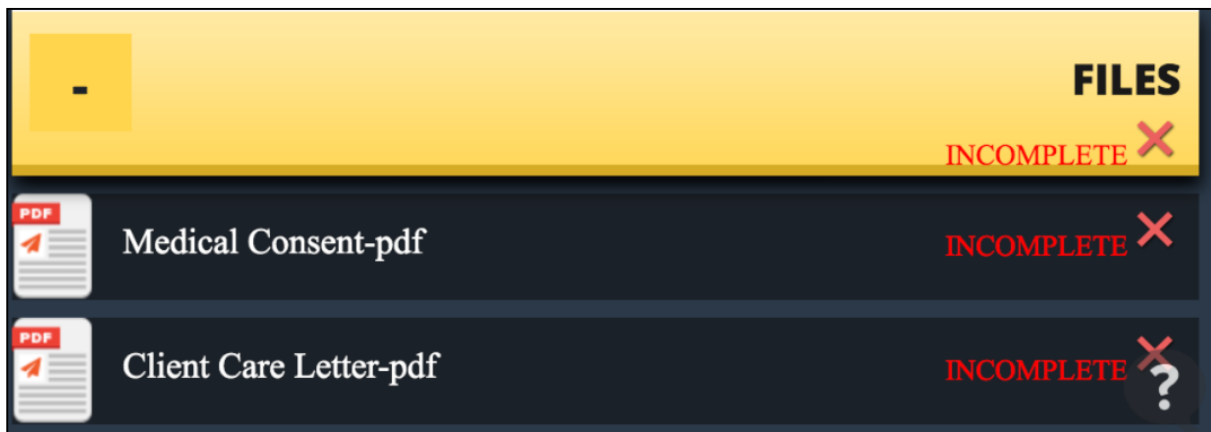
3. When you select one of the PDF's by touching the screen the PDF will open for you to complete with the Customer.

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. <u>DO NOT TAP ON TEXT, TAP IN THE SPACE ABOVE THE LINE)</u> & 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.

4. **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.**

5. **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.**

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

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.**

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.**

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.**

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.
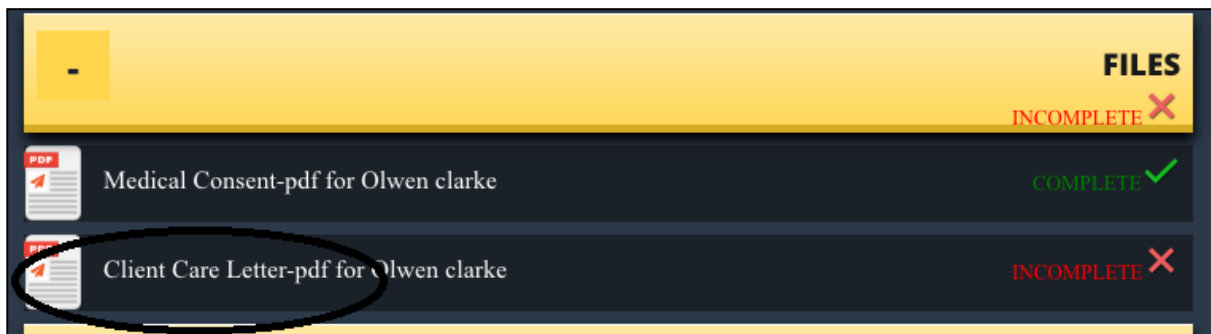
HOW TO DELETE:

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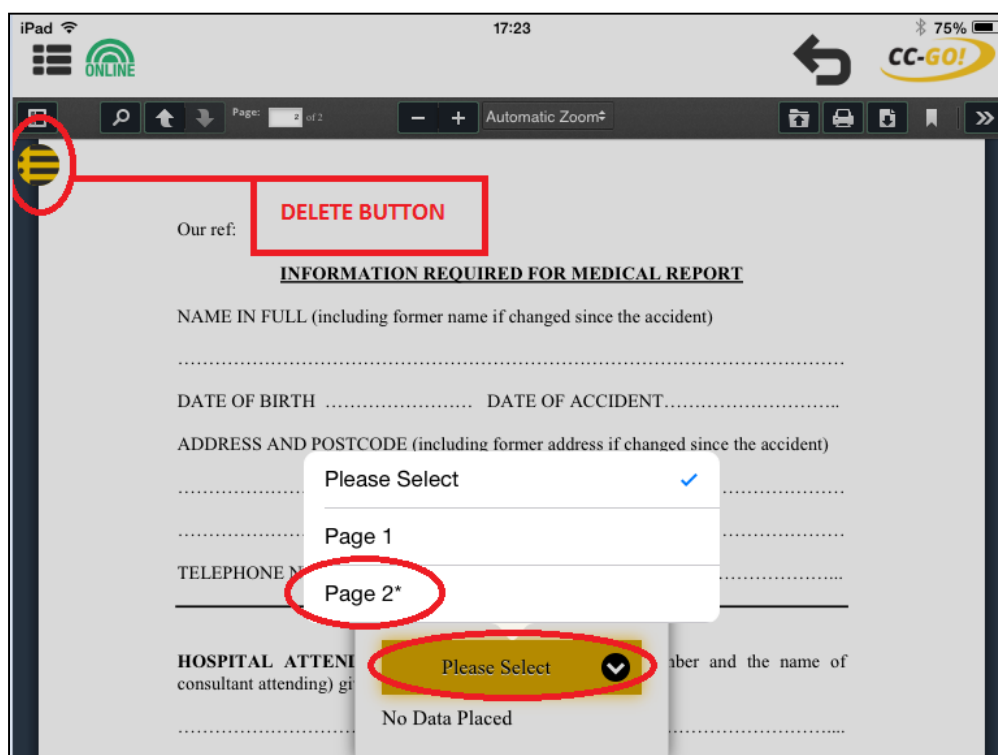
2. **If you select the page with the *(star) then a list of all of the data will appear. You are able to select the data you'd like to delete using the minus buttons that appear to the left of the text**
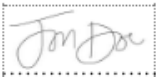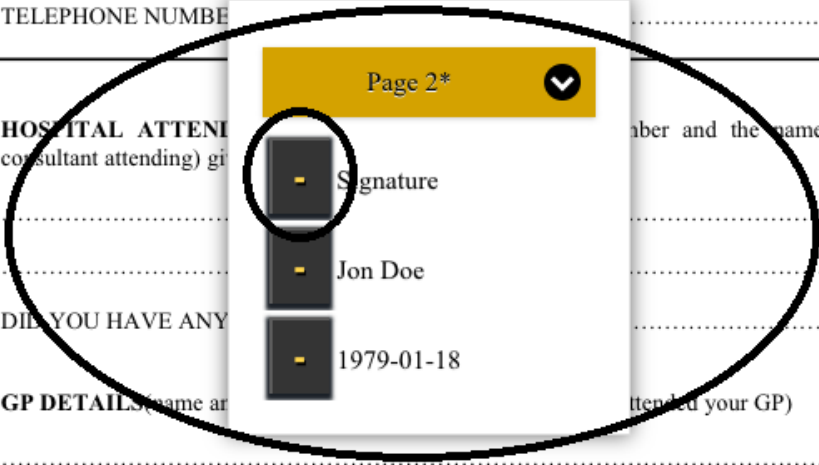
3. **The selected data then disappears**