

CD Forms on the IPAD

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CD Forms on the IPAD

Where to find the CD Forms

If your IPAD has had the CD Forms icon added during setup, it will probably look like (Image 2). If you had an older IPAD and had to add the icon yourself, then the icon looks like (Image 1). If you have either of these icons on your IPAD skip the next section on “Adding an Icon to Your Home Screen” and go directly to “Downloading the Forms to the IPAD”. If you do not see either of these on the IPAD use the instructions under Adding an Icon to Your Home Screen” to set this up.



Image 1



Image 2

Adding an Icon to Your Home Screen

If you would ever need to recreate the link to the CD Forms, open the Safari browser and enter the following URL. <http://dss.mo.gov/cd/info/forms/iforms.htm>

This step should be done for you and this is for future reference if you need to re-bookmark. Once you have selected the link it will open in Safari. See Image 3 below. Use the “Open In” symbol as shown and “Add a Bookmark” and “Add to Home Screen” for future access to the CD Forms for IPad site.



Image 3

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Downloading the Forms to the IPAD

Double click the CD Forms icon. If you select the icon and get the following message, it is because you do not have an active internet connection. You must be connected to get to the forms. Once you go check your connection and you come back to this page, use the Refresh.



Image 4

It is recommended that you open all of the forms in Adobe Acrobat DC once to save them to the iPad for use when you do not have an internet connection. Once the forms are loaded to the iPad you will only have to download a copy when a new version of the form is released or a new form is released for the iPad. As of this release 12/23/2014 there are currently 16 forms and this instruction sheet.

From the list displayed select desired form. Hover at the top of the form until you see “Open in..” (Image 5).

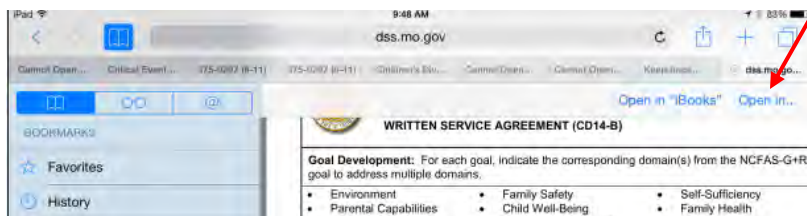


Image 5

When you tap on “Open In” the following box will display. Select the Open in “Adobe Acrobat.”



Image 6

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If you have downloaded the latest version of the Adobe Reader it is now called Adobe Acrobat and the



icon looks like this. Once it opens in Adobe Acrobat you will see the Home. This is where you will see the list of all of the forms and folders that you have. It also opens the new menu for Adobe Acrobat DC. All the tools that were in the previous Adobe Reader are used from Home, Comment and View, the rest of the tools except Help you will not be using until a later date (license required). View is only listed in the menu when you have a file open. (Image 7)

Adobe Main Menu

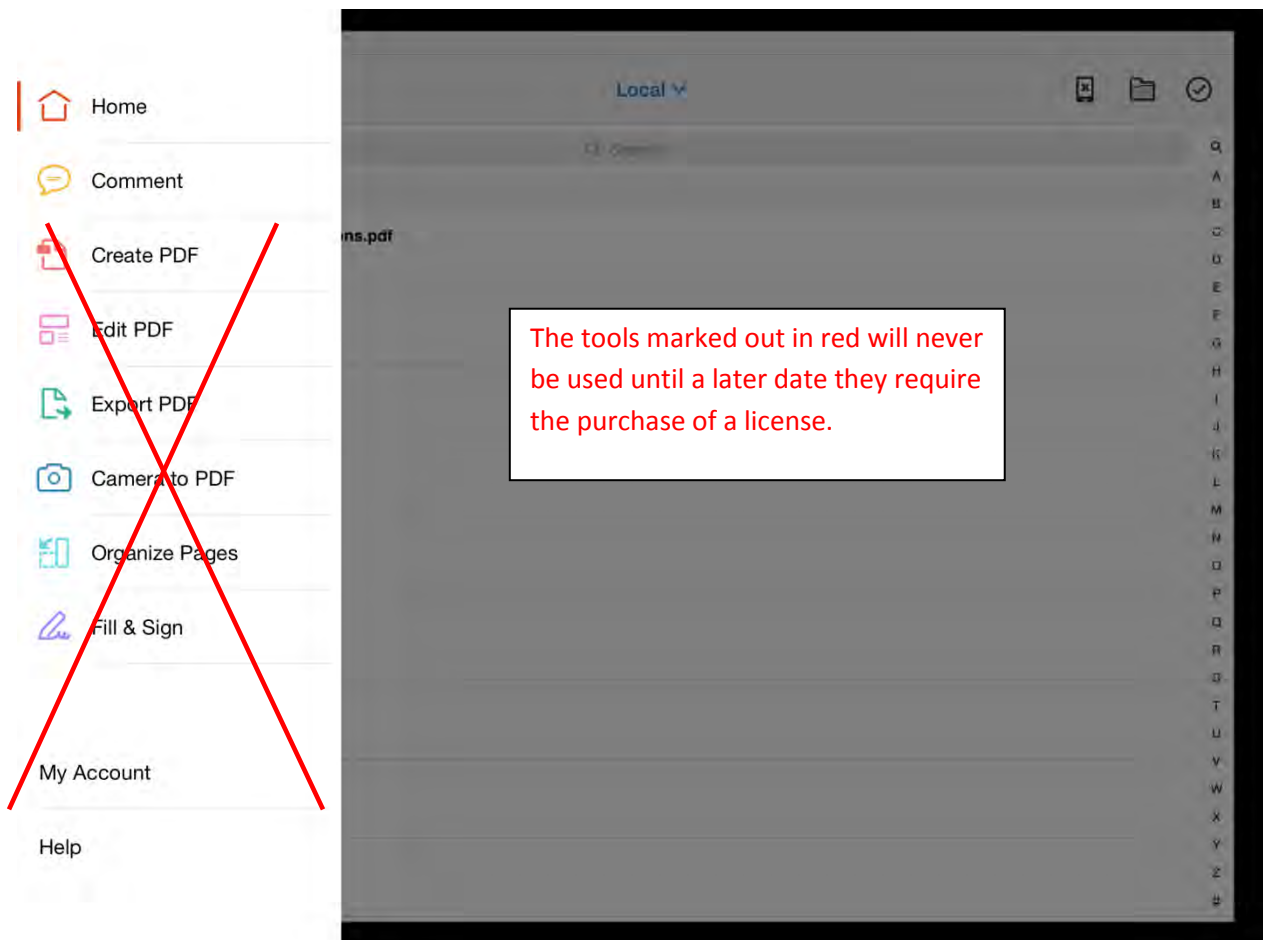


Image 7

From the toolbar indicated above (Image 7) tapping “Home” will open up the main Adobe Acrobat menu.

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When you are on the Home tab the list of the forms you have downloaded show, but folders do not show until you select the word “Recent” in the center of the page and change it to “Local”. (Image 8) Please download all of the forms while you are doing your setup, so that you have them for easy access and won’t require an internet connection to use them. Local will be the only option you use from this menu at this time.

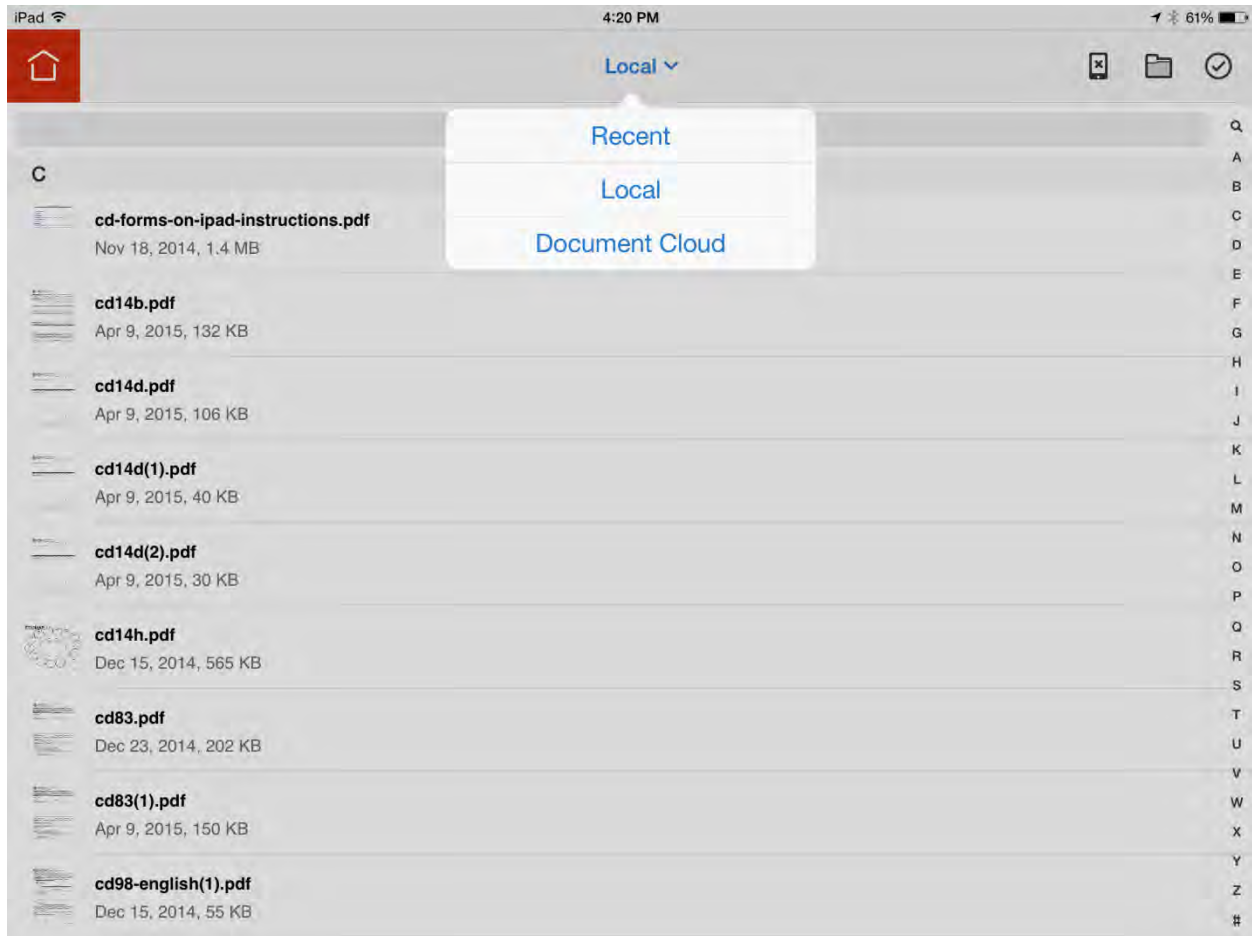


Image 8

In the upper right hand corner when you are in Home and Local you get the tools in image 9. The first Icon “Turn Mobile Link On” you will not be using at this time (License Required). The second icon that looks like a folder is to create a new folder and the third icon, the check box needs to be selected to get the menu at the bottom of image 10 that is used for moving, renaming or deleting files in folders.

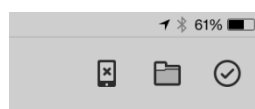


Image 9

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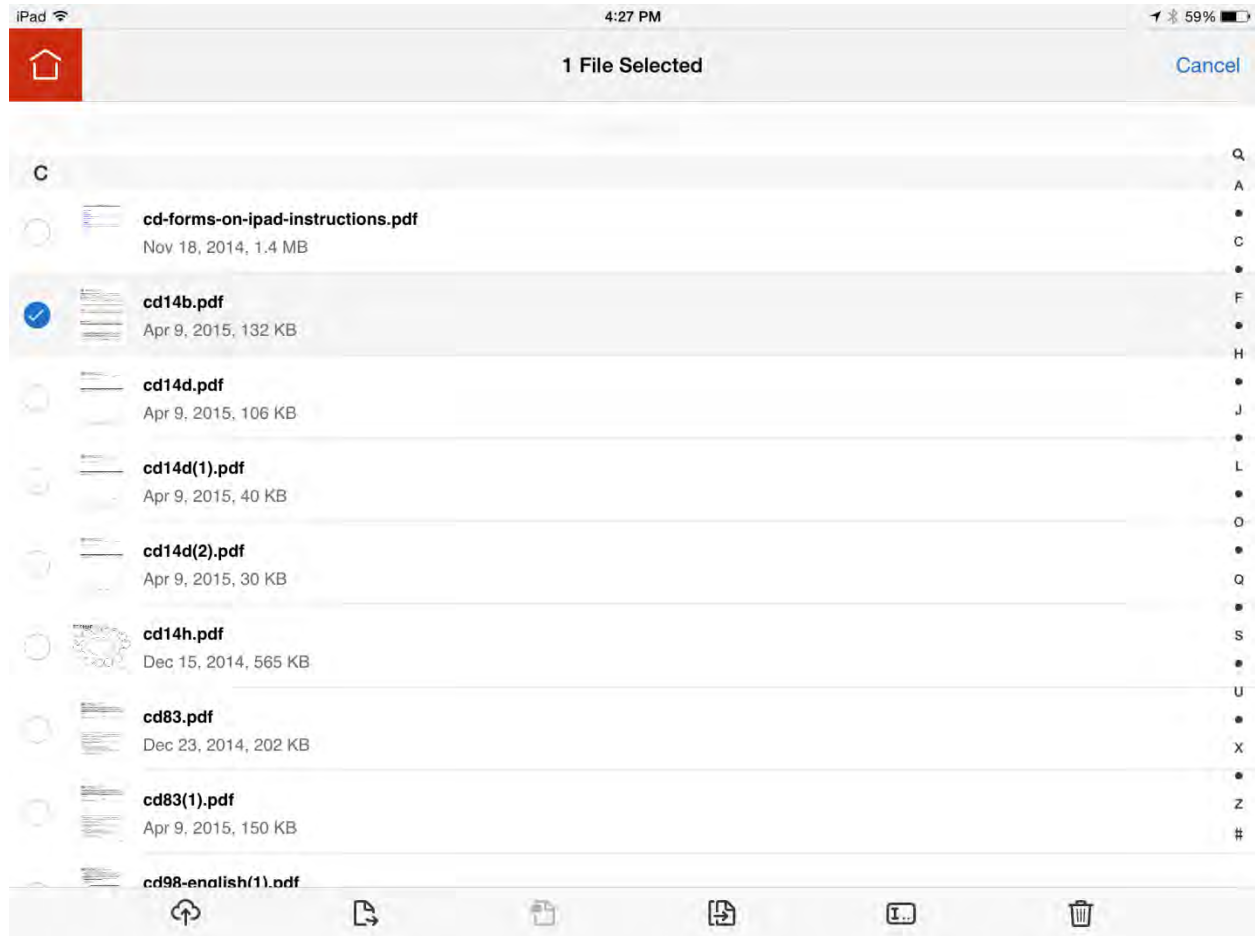


Image 10

Once you have checked the checkbox in upper right (Image 9) then the screen opens as in image 10 and you have to check the file that you want to move, rename or delete on the left as shown above. Once selected use the Move, Rename or Delete key as needed. (Image 11) The Cloud and Export icon will not be used at this time. (License Required)

Move/Duplicate

Rename

Delete

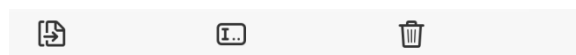


Image 11

Preparing Forms for Use on a Case

You can use the form directly from the main Adobe menu, however you should make a duplicate and rename the form to be case specific. See page 6 - 8. Using the form directly from the menu will overwrite the original copy of form. The form would have to be reloaded for additional use or if you fill a form out before remembering to make a duplicate, make your duplicate saved as another name, then open that form and use the RESET on that form to start new.

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How to Create a Folder:

- Select the Home icon 
- Make sure the center is set to “Local” 
- Select the folder icon  and a dialog box to name the new folder is opened. Type the name, then tap Create folder (Image 12). Folders are shown at the bottom of the Home page only when in Local.

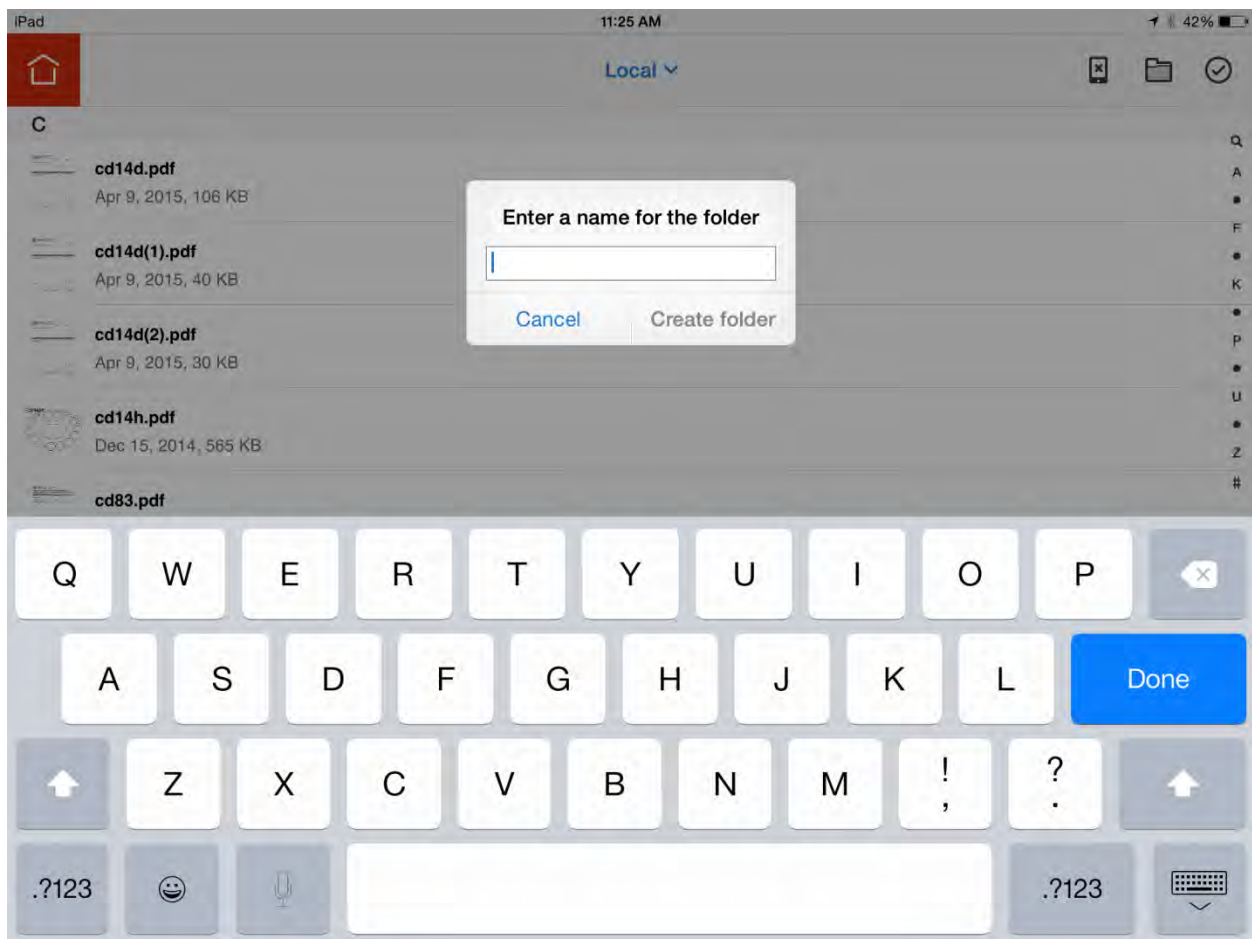


Image 12

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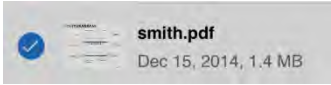
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How to Duplicate a Form

It is recommended that you always create a duplicate of your form for use on a case. That way you still have an original downloaded and won't require internet access to download it again.

To Duplicate a form:

- Select the Home icon 
- Make sure the center is set to "Local" 
- Select the checkbox icon upper right hand 
- Select the file you want to rename 

Select the Duplicate/Move icon , select duplicate and a copy with the same name and an incrementing number will appear in the list. (Image 14)

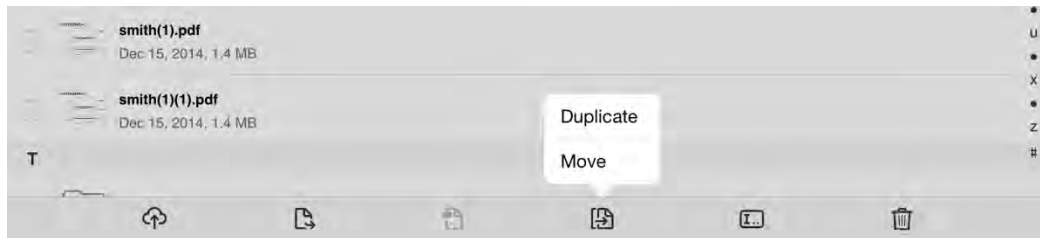


Image 13

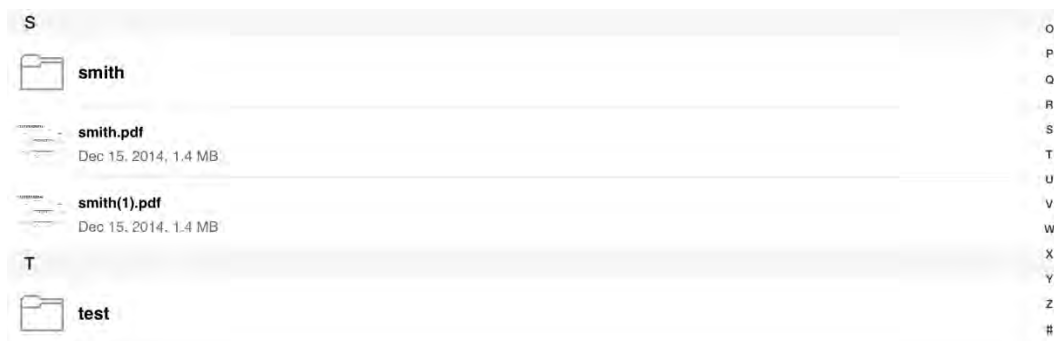


Image 14

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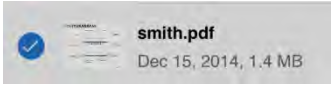
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How to Move a file to another Folder

It may be most appropriate to keep all the forms related to a case in a folder. To move a copy to a case folder the folder and the duplicate form has to be created first. (See page 7 & 8 above)

How To move a file:

- Select the Home icon 
- Make sure the center is set to "Local" 
- Select the checkbox icon upper right hand 
- Select the file you want to rename 
- Select the Duplicate/Move icon , then select Move. Once Move has been selected a dialog box to select the appropriate folder will open (Image 15).

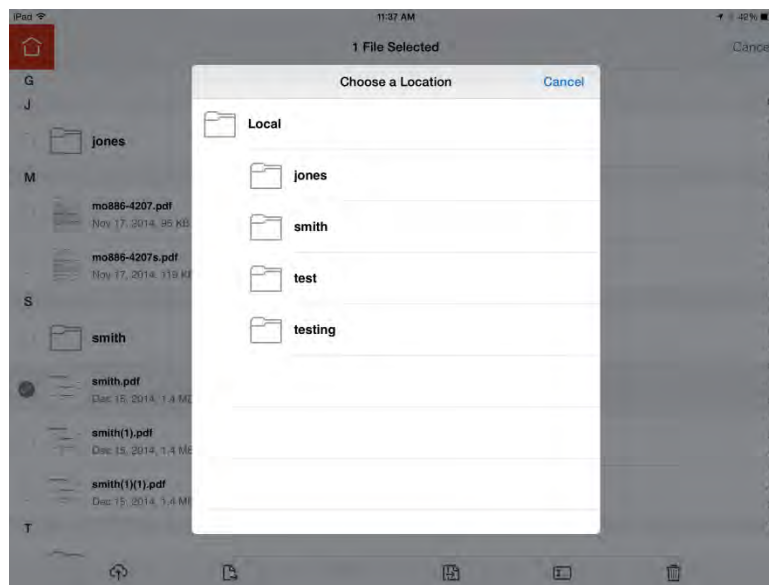


Image 15

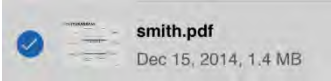
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How to Rename a files

Renaming a file is done the same as duplicating a file.

- Select Home icon 
- make sure the center is set to "Local" 
- select the checkbox icon upper right hand 
- select the file you want to rename 
- Select the Rename Icon  at the bottom of page, and the dialog box to give the new name opens.

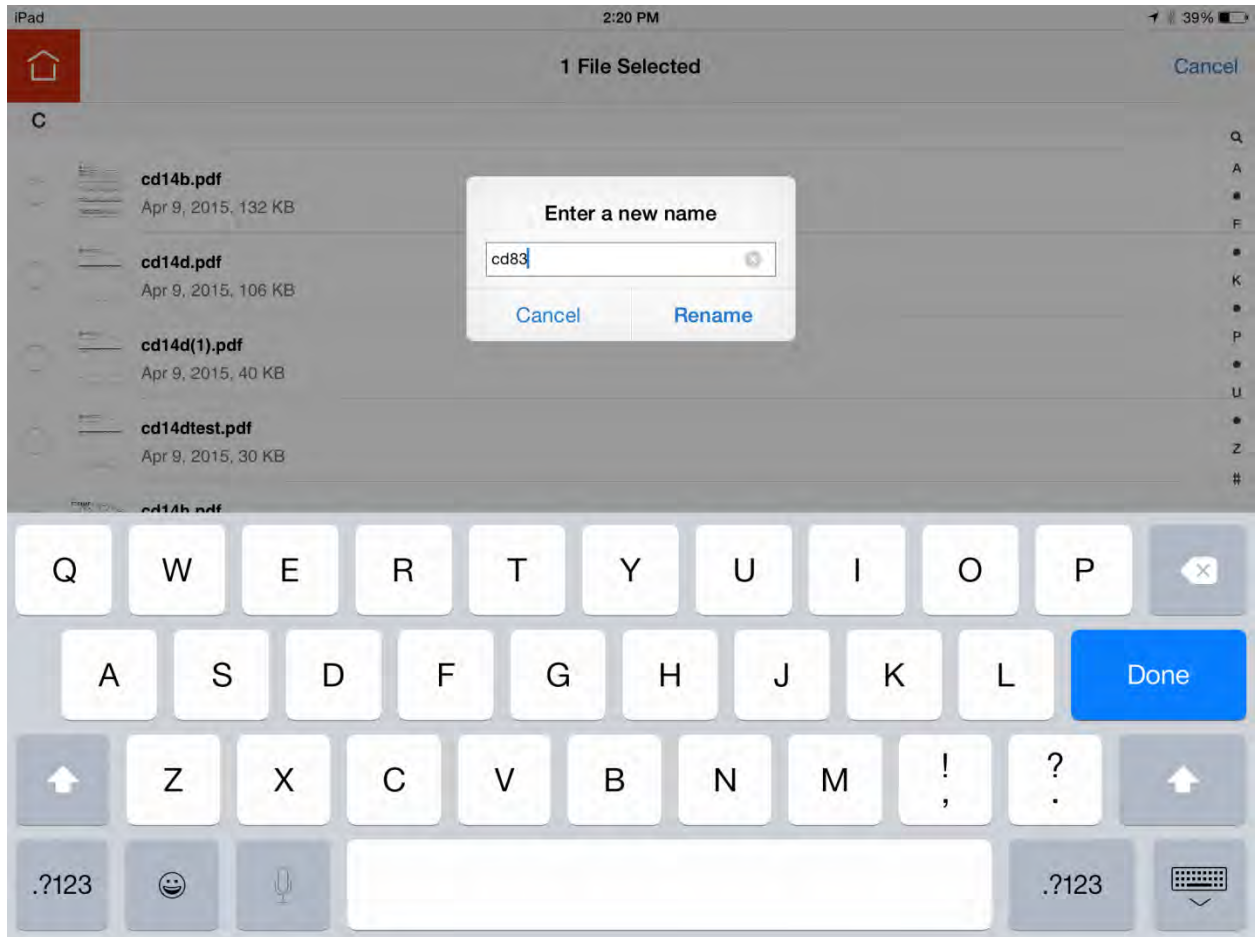


Image 17

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Tabbing through Fields

In order to tab using the screen keyboard, tap on a blank field on the form to get the grey toolbar to display. The Previous and Next buttons (image 15) on the gray menu do the tabbing. The attached keyboard must be turned off to use on screen keyboard tabbing.

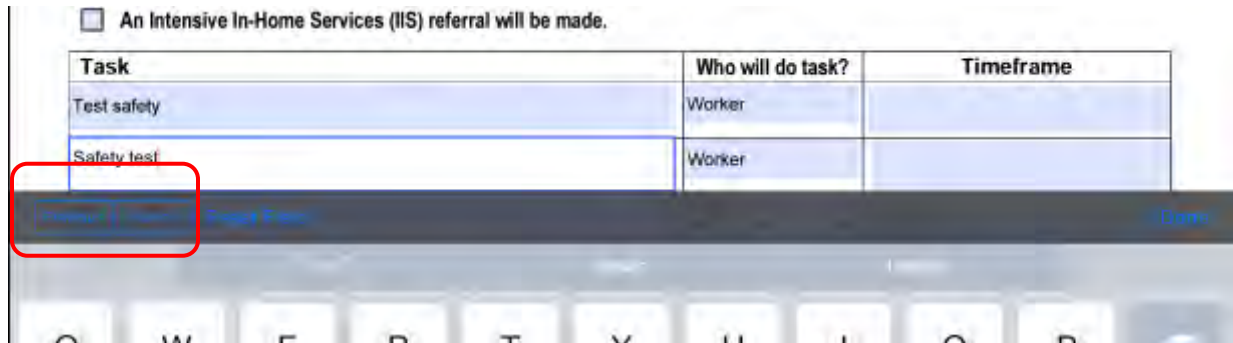


Image 18

Reset One Field (Image 19)

If you have entered incorrect date or content into a field by mistake or the field should be left blank, there is a way to “Reset” just one field. Tap on a blank field on the form to display the gray toolbar as indicated in Image 18. Tap on “Reset Field”, from the “Reset Field dialog box you can select “Reset” or “Cancel”.

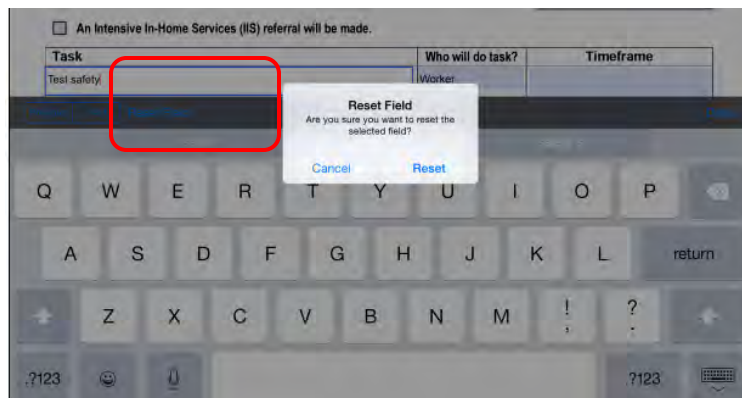


Image 19

The Form RESET button is located in the top right hand corner of the form. When tapped, this will remove all data in fields except for information entered in “Freehand” format such as signatures. Removal of signature fields maybe reset as indicated above or see also page 10.



Image 20

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How to Open the File to use the Prebuilt Fields

- Select Home 
- Make sure the center is set to "Local" 
- Select the form you want to work in and it will open in View Mode. You will know it is in View Mode because this icon will be in upper left corner.  Now you should be able to type in fields.

How to get to the Freehand and Signature Tools

- Select Home 
- Make sure the center is set to "Local" 
- Select the form you want to work in.
- Select the Comment Icon , select Home again to see it. Now you should have the Comment Menu at the bottom of the page. (Image 21)

Comment	Highlight	MarkThrough	Underline	Type Text	FreeHand	Signature
						

Image 21

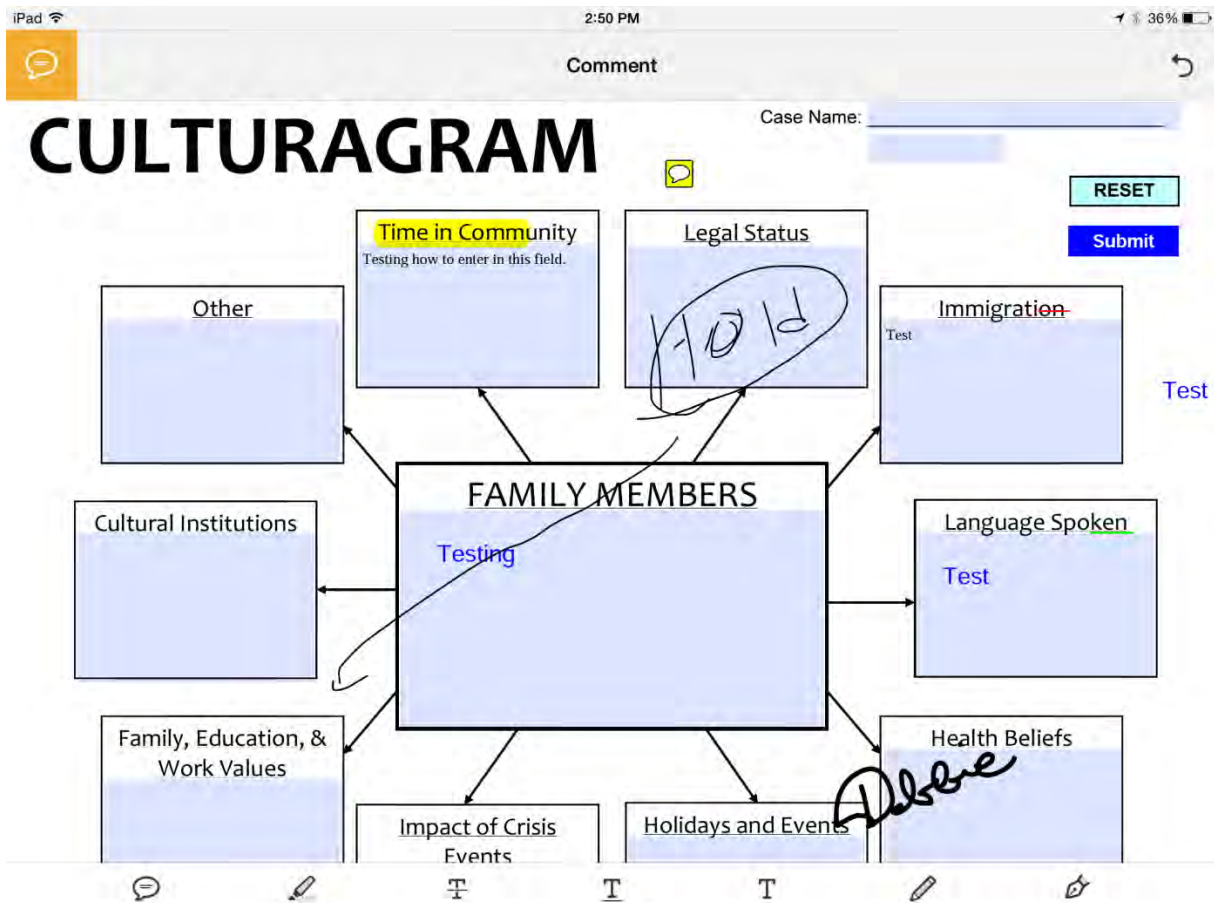
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What you can do with the Comment Tools. In the example page below, I used all of the tools.

-  **Note:** If you want to put a small note in your file that has to be selected to view use. 
The image below is just an image so does not display note when selected.
-  **Highlight:** Used below on "Time in Comm".
-  **StrikeThrough:** Used below at the end of Immigration.
-  **Underline:** Used below at end of Spoken.
-  **Typing or Text:** Used below everywhere you see the blue word Test. Can position anywhere on page not just in blue boxes. To type in the blue boxes, smaller fonts you need to be in View Mode.
-  **Freehand:** This is the tool used to draw or for capturing customer signatures. Shown below Hold circled with arrow.
-  **Signature:** This always retains the last signature entered and inserts wherever indicated. Best used for worker signature.



iPad 2:50 PM 36%

Comment

Case Name: _____

CULTURAGRAM

RESET Submit

Time in Community
Testing how to enter in this field.

Legal Status
Hold

Immigration
Test

Language Spoken
Test

Health Beliefs

Holidays and Events

Impact of Crisis Events

Family, Education, & Work Values

Cultural Institutions

Other

FAMILY MEMBERS
Testing

Image 22

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How to collect a group of the customer's initials or Signatures

Select and hold with your finger or stylist on an area that is not shaded in blue. A toolbar will display (Image 23), select "Freehand". Using the stylist or your finger enter initials, signatures, or other data as required.

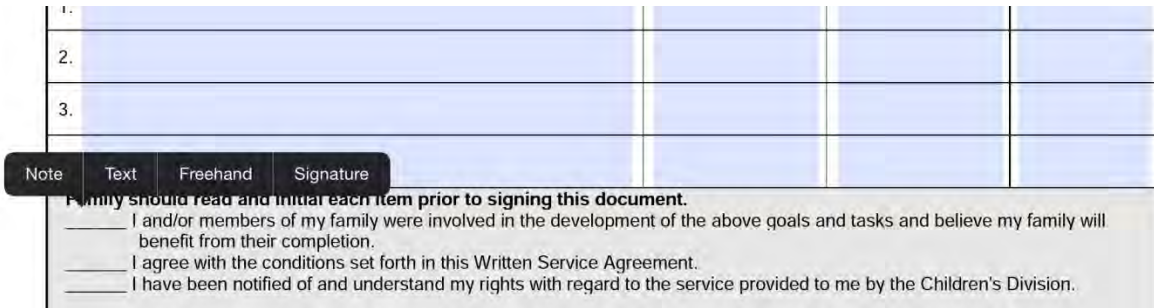


Image 23

The "Freehand" tool in the black menu in Image 23 is the same as the inside pencil tool in the menu in image 24. The same is true for the "Signature" tool.

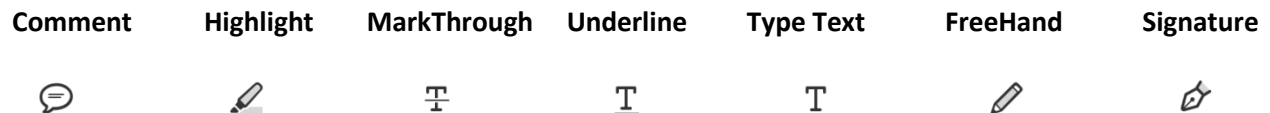


Image 24

Helpful Hints "Freehand" Editing

When in freehand style mode, trying to scroll down the page or tapping any area of the form may leave unintended marks on the screen. You can use the Undo (Image 25) or Redo (Image 26) buttons to erase or put back any pencil marks.

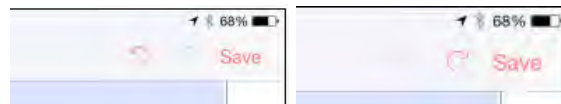


Image 25 Undo

Image 26 Redo

To save the "Freehand" information tap on "Save".

You should be careful not to overlap signatures with date fields. If you cannot select a date field it could be because the signature field is overlapping it. Use the select to modify box to move the signature. See image 27.

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Modifying or Deleting a Signature or Anything done with “Freehand”

In order to delete or change the color of a signature that is already on the form select the signature you want to change. It will create a blue select box around the signature. If you do not get the menu for Delete, Thickness, Color and Opacity, select the right corner dot (Image 25). These settings are saved to last used and carry over from form to form. So I would set the color and thickness I want to normally use and leave it.

4.

Family should read and initial each item prior to signing this document.

☐ I and/or members of my family were involved in the development of the above goals and tasks and believe my family will benefit from their completion.

☐ I agree with the conditions set forth in this Written Service Agreement.

☐ I have been notified of and understand my rights with regard to the service provided to me by the Children's Division.

Delete Thickness... Color... Opacity...

Family Signature Date

Worker Signature Date

Supervisor Signature Date

Submit

DISTRIBUTION: ORIGINAL - FAMILY COPY - CASE FILE

CD-14B (REV 10/1)

Image 27

Using the “Signature” tool

3.

Note Text Freehand Signature

Family should read and initial each item prior to signing this document.

☐ I and/or members of my family were involved in the development of the above goals and tasks and believe my family will benefit from their completion.

☐ I agree with the conditions set forth in this Written Service Agreement.

☐ I have been notified of and understand my rights with regard to the service provided to me by the Children's Division.

Image 28

Your Worker's signature can be retained in the signature tool for use on any form. To create your signature tap and hold on signature field of form until menu above appears. Select “Signature”. A blank box will appear which allows you to enter your freehand signature. (Image 29) Tap Save in top right hand corner of screen.

To use this signature in the future, tap and hold signature field until toolbar displays as indicated in image 28. Select “Signature”, then menu to “Add Signature”/Edit Signature” displays, selecting “Add Signature” will place your signature in field. NOTE: If you select “Edit Signature” it will take you back to your signature box if needed.

Signature

Clear Thickness

Image 29

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Submit Your Forms

There are actually two ways to submit your form; both are sending an email to yourself. Because the Email uses CDS Sentry and Adobe Acrobat that run through the Mobile Iron for security this is a secure method of sending to your work email account. Forms should not be sent to a personal email accounts as data would not be secure.

The “Share File” icon is now found at the bottom of the page when you have a form open in Viewer Mode. The rest of the tools in the pop up menu below will not be used at this time. The “Open In” you shouldn’t have a reason to use. Print Document we are not supporting currently Save to the Adobe Document Cloud is not a feature we will be using and of course Share Public Link gives you the option to create a Free Cloud Account. This is not a secure environment for your documents. (Image 31)



Image 30 “Open In”

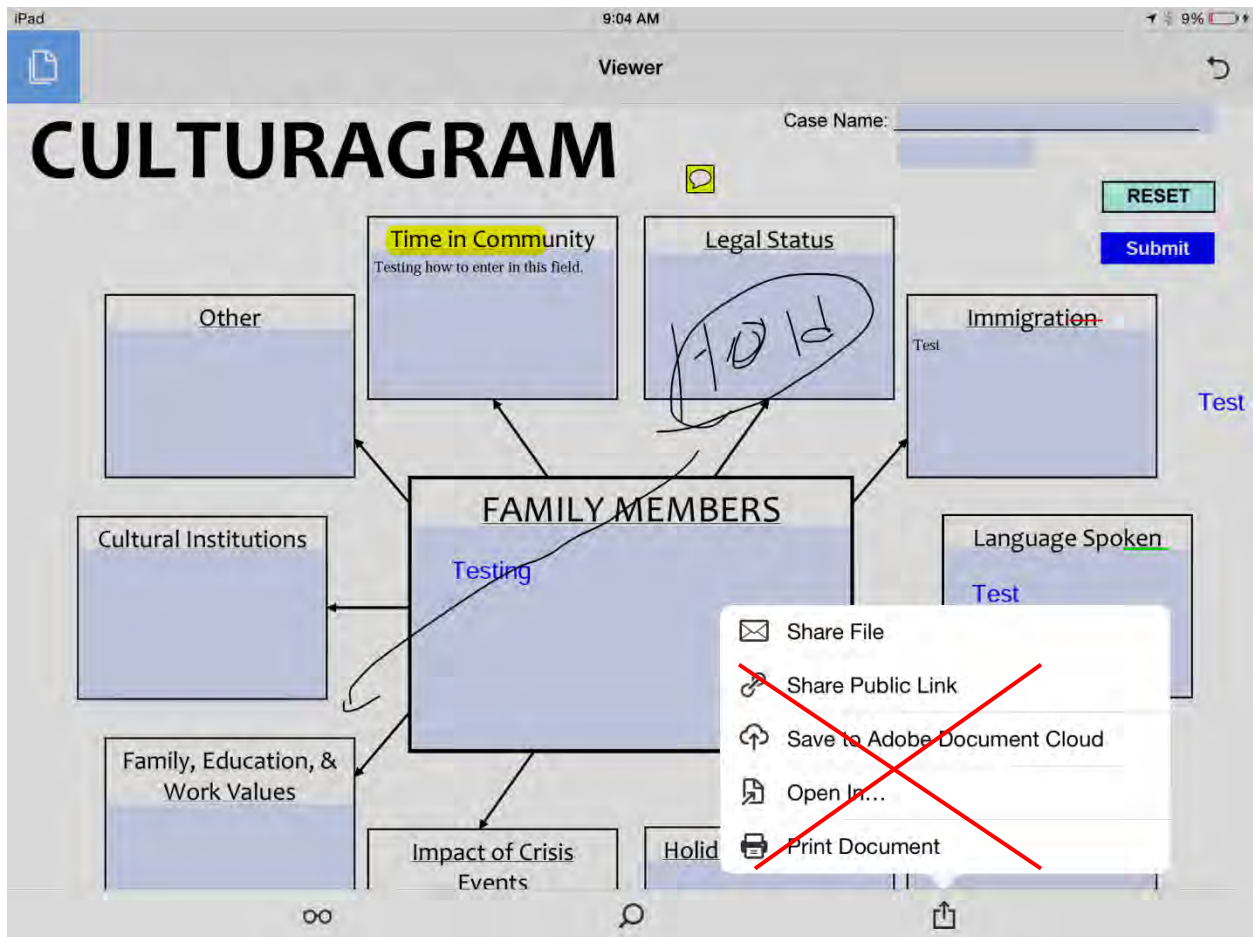
The screenshot shows the 'CULTURAGRAM' form in 'Viewer' mode on an iPad. The form is a central box labeled 'FAMILY MEMBERS' with arrows pointing to several surrounding boxes: 'Time in Community', 'Legal Status', 'Immigration', 'Language Spoken', 'Impact of Crisis Events', 'Family, Education, & Work Values', 'Cultural Institutions', and 'Other'. The 'Legal Status' box contains the handwritten text 'H-1B'. The 'Time in Community' box has a yellow highlight and the text 'Testing how to enter in this field.' The 'Immigration' box has the word 'Test' and a red line through it. The 'Language Spoken' box has the word 'Test' and a green underline. The 'FAMILY MEMBERS' box has the word 'Testing' in blue. At the top right, there is a 'Case Name:' field, a 'RESET' button, and a 'Submit' button. A context menu is open over the 'FAMILY MEMBERS' box, showing options: 'Share File', 'Share Public Link', 'Save to Adobe Document Cloud', 'Open In...', and 'Print Document'. A large red 'X' is drawn over the entire context menu. The iPad status bar at the top shows '9:04 AM' and '9%' battery.

Image 31

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The second way would be to select the Submit button located at the bottom of each form. Either method will display a message as indicated in image 32.



Format to send E-mail Document

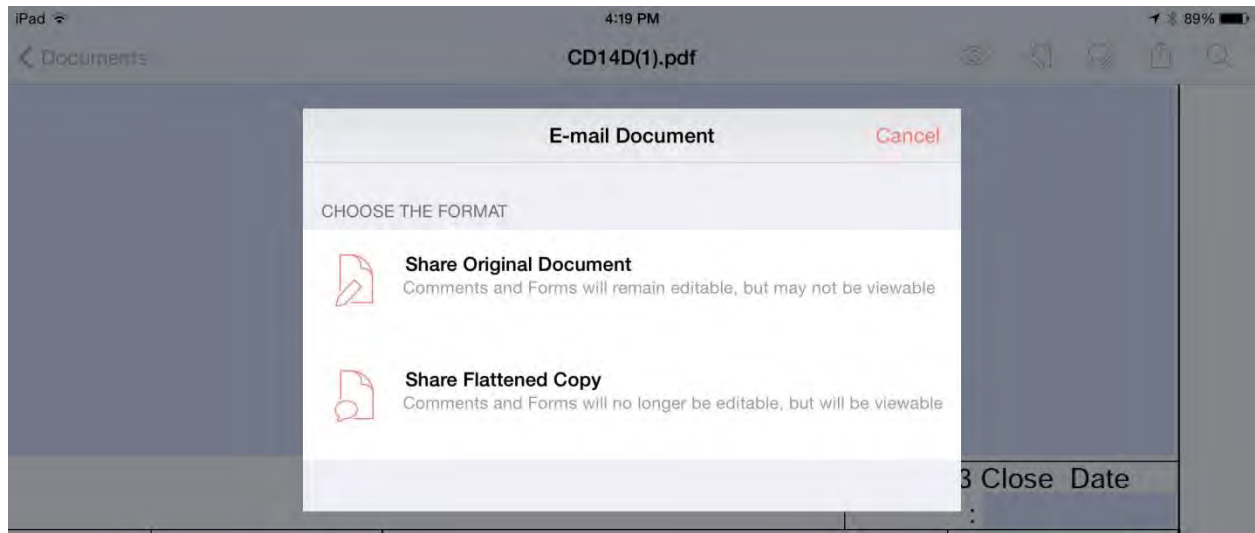


Image 32

In order for all signatures and form content to be captured for printing it requires that you use the **“Share Flattened Copy”**. If you need to continue to collect signatures, wait until you have finished all signatures on the iPad before emailing to yourself.

Printing Forms

Printing forms from the IPAD is not something that is going to be supported at this time, because it requires wireless printing. So if you have the need to print the form that will be done after it has been emailed back to yourself and opened in the office environment. In order for all signatures and form content to be captured for printing it requires that you use the “Share Flattened Copy” when emailing.

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