

CD Forms on the IPAD

Table of Contents

Adobe Menu	4
Capture Customer Initials	9
Capturing, Editing Customer Signature	9 - 11
Create a Folder	4
Delete Signature	10
Downloading Files to the IPAD	2
Duplicate a File	6
Email Form	12 -13
Freehand Tool	9 - 10
Format to select after selecting Submit ... "Share Flattened copy"	13
Move a File	7
Open the Form in Adobe Reader	2
Preparing Forms for Use on a Case	6
Printing Forms	13
Rename File	7
Reset One Field	8
Save the Forms to the IPAD	2
Submit Form	12-13
Tabbing on the IPad	8
Where to find the CD Forms	2

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

[Return to the Table of Contents](#)

CD Forms on the IPAD

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 Reader 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 Reader."

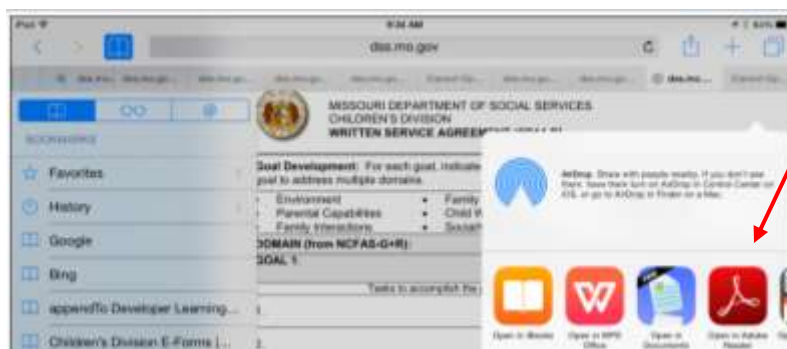


Image 6

[Return to the Table of Contents](#)

CD Forms on the IPAD

Once it opens in Adobe Reader you will see the Main menu for the Forms in Adobe Reader appear at the top in red. If it does not appear there, tap on any blank space at the top of the screen to display toolbar. (Image 7)

Documents or Adobe Main Menu

The screenshot shows a PDF form titled "MISSOURI DEPARTMENT OF SOCIAL SERVICES CHILDREN'S DIVISION WRITTEN SERVICE AGREEMENT (CD14-B)". The form includes a header with the state seal and a page number "Page ___ of ___". Below the header, there is a section for "Goal Development" with instructions: "For each goal, indicate the corresponding domain(s) from the NCFAS-G+R assessment. It is possible for one goal to address multiple domains." This is followed by a list of domains: Environment, Parental Capabilities, Family Interactions, Family Safety, Child Well-Being, Social/Community Life, Self-Sufficiency, Family Health, Readiness for Reunification, and Caregiver/Child Ambivalence. The form then has a section for "DOMAIN (from NCFAS-G+R):" and "GOAL 1:". At the bottom, there is a table with columns: "Tasks to accomplish the goal", "Who will do the task?", "Time frame?", and "Date Completed".

Image 7

From the toolbar indicated above (Image 7) tapping “Documents” will open up the main Adobe Reader menu and you will be able to see the entire list of the forms you have downloaded. (Image 8) Please download them all while you are doing your setup, so that you have them for easy access and won’t require an internet connection to use them.

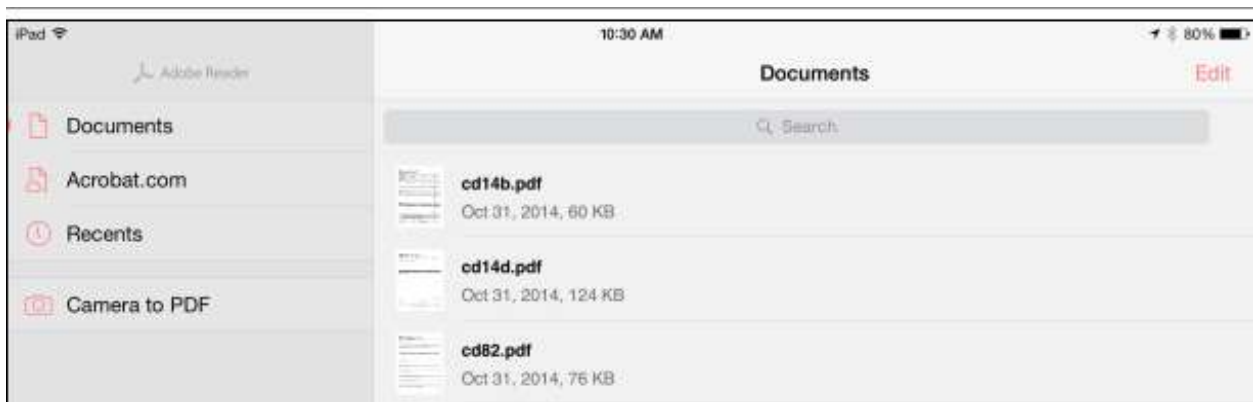


Image 8

Once in Adobe Reader your page will look like the image below perhaps with the little black cloud prompting you to tap there to convert to Word or Excel. You don’t want to do that because secure data would be on the tablet in an unsecure area. Even though you are now working in Adobe Reader the process of submitting them is flowed through Mobile Iron for securing the data that is on the forms.

This is a good time to tell you about the menu at the top of the screen when open in a form. (Image 9) The “Documents” will take you back to the complete listing of your forms. Check out the tools on the

CD Forms on the IPAD

top right. The entire menu collapses to hidden and you have to hold your finger or stylist at the top of the page or where the page “1/1” is on the left side to reopen.

cd14BNCFAS - case#(1).pdf

MISSOURI DEPARTMENT OF SOCIAL SERVICES
CHILDREN'S DIVISION
WRITTEN SERVICE AGREEMENT (CD14-B)

Goal Development: For each goal, indicate the corresponding domain(s) from the NCFAS-G+R a goal to address multiple domains.

- Environment
- Parental Capabilities
- Family Interactions
- Family Safety
- Child Well-Being
- Social/Community Life
- Self-Sufficiency
- Family Health
- Readiness for Reunification
- Caregiver/Child Ambivalence

DOMAIN (from NCFAS-G+R):

GOAL 1:

Tasks to accomplish the goal	Who will do the task?	Time frame?	Date Completed
1.			

Image 9

The center tool (image 10) maybe the most used, it opens another tool menu at the bottom of the page (image 11) that will give you the signature tools that are discussed on pages 8 - 11.

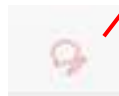


Image 10



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. If using the form directly from the menu will over write the original copy of form. The form would have to be reloaded for additional use.

[Return to the Table of Contents](#)

CD Forms on the IPAD

How to Create a Folder

From the Adobe Main Menu or “Documents” menu select the word “Edit” in the upper right hand of the window. A menu will appear at the bottom (Image 12) of the screen with only one option available unless you had a form selected. That available icon is the make directory or folder button. Select it and a dialog box will appear to name your folder, then select “Create Folder”. (The Help menu below from Adobe says “Tap OK, but it is actually “Create Folder”). Creating Case folders is a good way to separate your forms from the main version you want to maintain on the tablet and from other case forms. The longer your list gets here, the harder to find the correct form back.

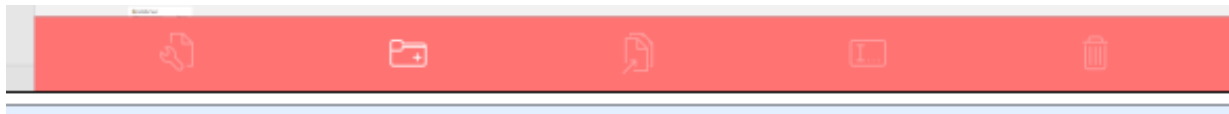


Image 12

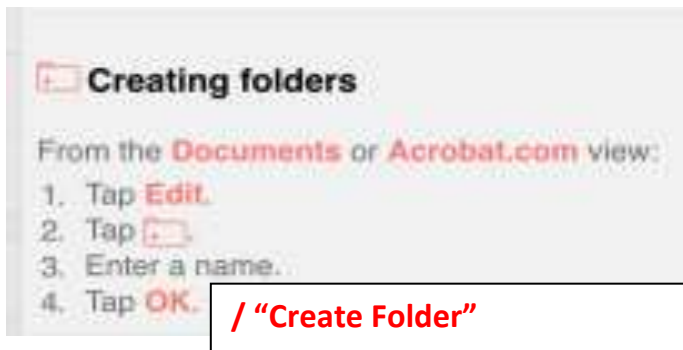


Image 13

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. Once the form has been downloaded and opened in Adobe Reader, go to the Document menu, by selecting the word “Document” at the top of the form. Once in the “Document” menu select the word “Edit” in the upper right hand corner of the screen. This opens a checkbox field next to each form. Select the form you desire to duplicate. Now a menu appears at the bottom (Image 14) of the screen select the image that looks like 2 pages, select "Duplicate" and a duplicate file is created with the same name with (1) incorporated. Example: a duplicated cd14.pdf will display as: cd14(1).pdf It will probably be helpful to rename the duplicate copy of the form you are using. See page 7 (Image 15)

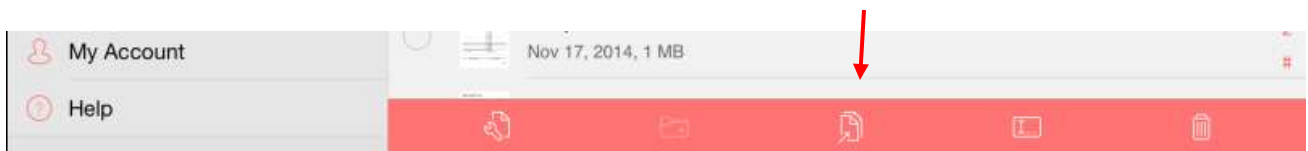


Image 14

[Return to the Table of Contents](#)

CD Forms on the IPAD

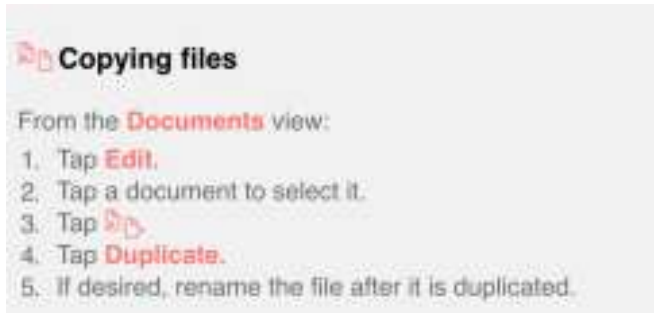


Image 15

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 do that from the "Documents" menu select the word "Edit" from the upper right hand corner of the screen. Now select the duplicate copy of the form that you want to move to the case folder, and then from the menu below select the same double paged icon that you used to make the duplicate file only this time select Move. Another dialog box will open giving you the different folders you have created as options. Select the appropriate case folder. (Image 16)

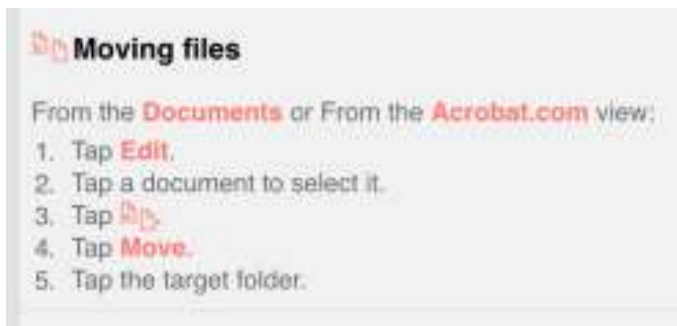


Image 16

How to Rename a files

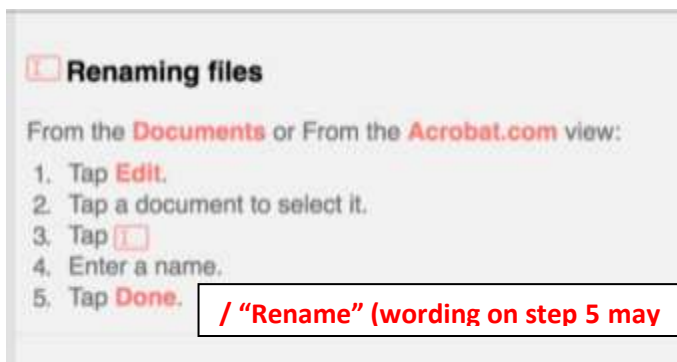


Image 17

[Return to the Table of Contents](#)

CD Forms on the IPAD

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.

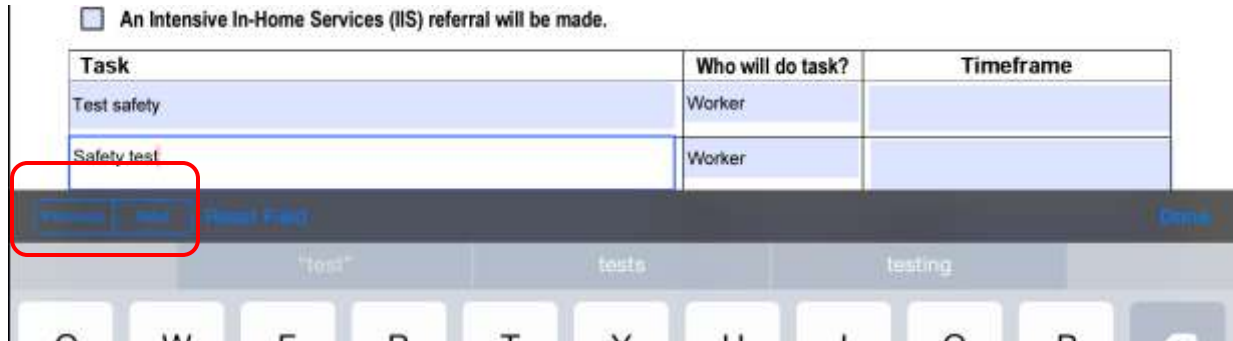


Image 18

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 grey toolbar as indicated in Image 18. Tap on "Reset Field", from the "Reset Field" dialog box you can select "Reset" or "Cancel".

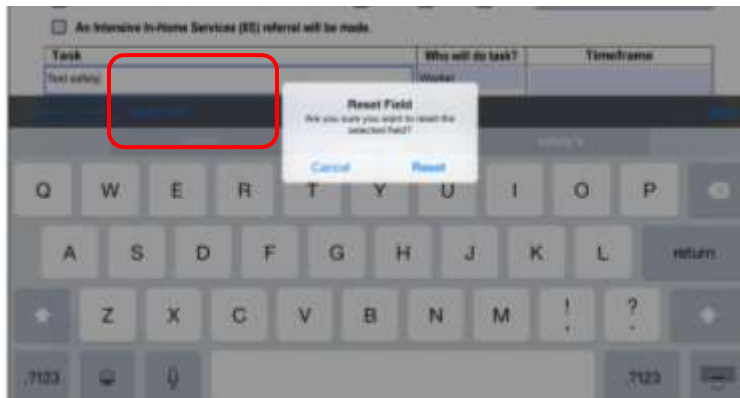


Image 19

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

[Return to the Table of Contents](#)

CD Forms on the IPAD

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 21), select "Freehand". Using the stylist or your finger enter initials, signatures, or other data as required.



Image 21

The "Freehand" tool in the black menu in Image 21 is the same as the inside pencil tool in the menu in image 22. The same is true for the "Signature" tool.



Image 22

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 23) or Redo (Image 24) buttons to erase or put back any pencil marks.



Image 23 Undo

Image 24 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 25.

CD Forms on the IPAD

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.

____ service Agreement.

____ with regard to the service provided to me by the Children's Division.

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

Family Signature	Date	Family Signature	Date
Worker Signature	Date	Supervisor Signature	Date

Submit

DISTRIBUTION: ORIGINAL - FAMILY COPY - CASE FILE

CD-14B (REV 10/11)

Image 25

CD Forms on the IPAD

Using the “Signature” tool

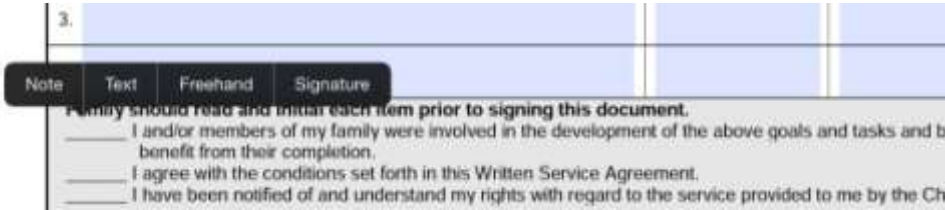


Image 27

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 28) 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 27. 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.



Image 28

[Return to the Table of Contents](#)

CD Forms on the IPAD

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 Reader 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.

With your form open in the main Adobe Menu, select the “Open In” button (Image 32), then select “E-mail Document”. (Image 33)



Image 32 “Open In”

SS-63 Close Date

Date	Family Signature	Date
Date	Supervisor Signature	Date

Distribution: Original-Case File Copy-Family CD-14D (REV 10-13)

1 / 1

Image 33

[Return to the Table of Contents](#)

CD Forms on the IPAD

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 33.



Format to send E-mail Document

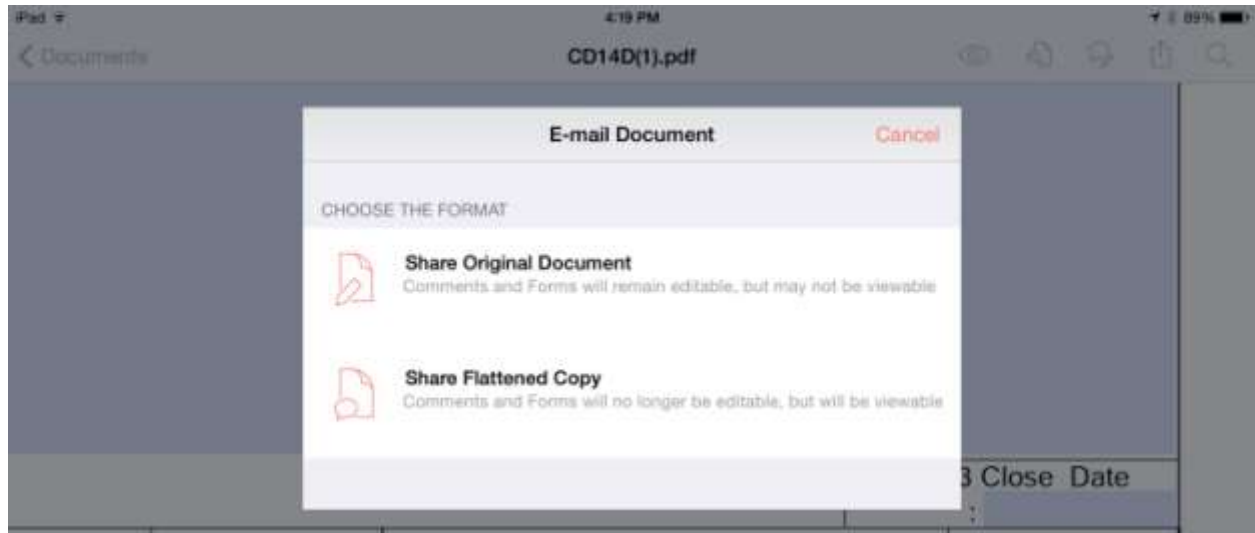


Image 33

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.

[Return to the Table of Contents](#)