

GENERATING AN E-SIGNATURE PIN

e-Signature PINs may be issued to those authorised to sign a child in and out of care. There are several types of people who may be issued e-Signature PINs: Parent/Guardian, Partner, Family Contacts and service staff.

e-Signature PINS are sent via email. Therefore a valid email address is required to issue an e-Signature PIN.

You can generate pins individually or we have a feature (Family Pin Management) you can turn on which allows service to enable e-Signature PINs for multiple contacts at a time. This will include Parent/Guardian, Partner, Family Contacts.

This tip sheet will walk you through:

- **Generating individual pins for:**
 - **Registered Parent/Guardian**
 - **Partner of Registered Parent/Guardian**
 - **Family Contacts**
 - **Service Staff**
- **Family Pin Management**
- **e-Signature Audit Log**
- **Troubleshooting**

Summary

Generate Pin for Parent

1. Click on childcare menu
2. Select parent/guardians
3. Use search keyword menu to find the parent
4. Click edit
5. Navigate to the e-Signature tab

Summary cont.

6. Tick enable e-signature access
7. Enter start date
8. Click generate
9. Click save

Generate Pin for Partner

1. Click on childcare menu
2. Select parent/guardians
3. Use search keyword menu to find the parent
4. Click edit
5. Navigate to the partner tab
6. Tick enable e-signature access
7. Enter start date
8. Click generate
9. Click save

Generate Pin for Contact

1. Click on childcare menu
2. Select parent/guardians
3. Use search keyword menu to find the parent
4. Click edit
5. Navigate to the contact tab
6. On each contact, click on the drop down arrow (next to the edit button)
7. Select e-Signature
 - a. Enter an email address
 - b. Tick enable e-Signature access
 - c. Tick authorise for pickup
 - d. Enter start date
 - e. Save
 - f. Click the generate button
 - g. Click ok to the confirmation message
 - h. Click close

Summary cont.

Family PIN management

Turn on feature

10. Click on the settings cog
11. Select Site Settings
12. Tick Enable e-Signature Family PIN Management
13. Click Save

Generate PINS

1. Click on childcare menu
2. Select parent/guardians
3. Use search keyword menu to find the parent
4. Click edit
5. Navigate to the e-Signature tab
6. Click Manage Family Pins button
7. Select contacts
8. Select start date
9. Click generate

GENERATING AN E-SIGNATURE PIN

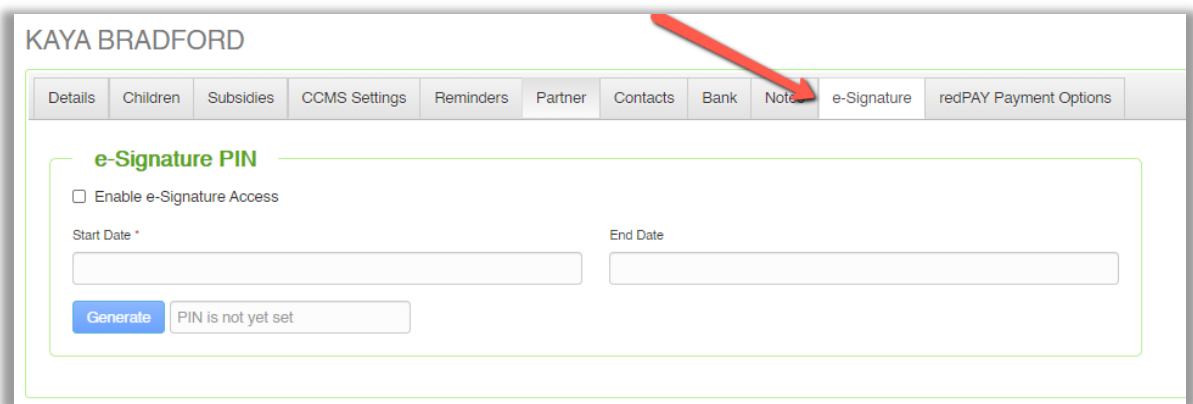
Detailed

Registered Parent/Guardian

To issue a Parent/Guardian with an e-Signature PIN, open the Child Care menu and select Parents/Guardians:

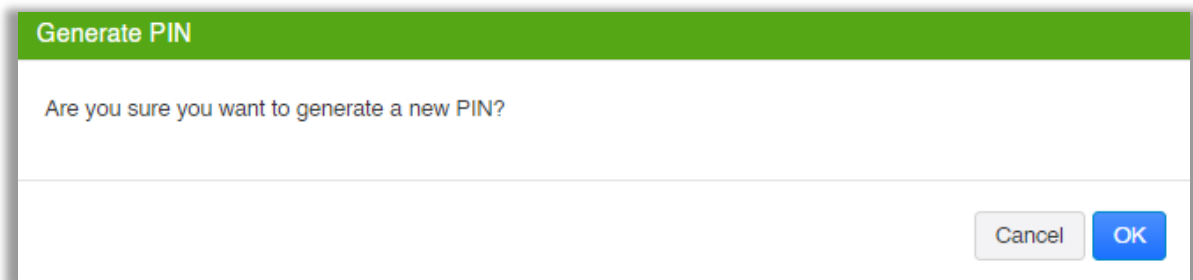


Select a parent and click the Edit button. Next, open the e-Signature tab:



Tick Enable e-Signature Access, enter start date then click the Generate button.

You will then receive a confirmation message, click OK



Detailed cont.

This will send an email to the Parent/Guardian containing their e-Signature PIN and you will receive a successful message:

KAYA BRADFORD

Home Family Guardians Edit

Details Children Subsidies CCMS Settings Reminders Partner Contacts Bank Notes e-Signature redPAY Payment Options

Generate PIN
✓ A new PIN was successfully generated. The guardian will receive an email regarding the new PIN.

e-Signature PIN

Enable e-Signature Access

Start Date * 15/02/2021 End Date

Partner of Registered Parent/Guardian

To issue a PIN to the partner of the registered Parent/Guardian, open the Partner tab:

KAYA BRADFORD

Home Family Guardians Edit

Details Children Subsidies CCMS Settings Reminders Partner **Contacts** Bank Notes e-Signature redPAY Payment Options

Details

Name Damien Bradford

Email support@childcarecentral.com.au

Relationship to Child Father Date Of Birth

e-Signature PIN

Enable e-Signature Access

Start Date * End Date

PIN is not yet set

Tick Enable e-Signature Access, enter start date then click the Generate button.

You will then receive a confirmation message, click OK

Generate PIN

Are you sure you want to generate a new PIN?

This will send an email to the Parent/Guardian containing their e-Signature PIN and you will receive a successful message:

KAYA BRADFORD

Home Family Guardians Edit

Details Children Subsidies CCMS Settings Reminders Partner Contacts Bank Notes e-Signature redPAY Payment Options

Generate PIN
✓ A new PIN was successfully generated. The user will receive an email regarding the new PIN.

Details

Name Damien Bradford

Email support@childcarecentral.com.au

Relationship to Child Father Date Of Birth

e-Signature PIN

Enable e-Signature Access

Start Date * 15/02/2021 End Date

Detailed cont.

Family Contacts

To issue an e-Signature PIN for authorised contacts, open the 'Contacts' tab:

KELLY RODGERS

Details Children Subsidies CCMS Settings Reminders Partner **Contacts** Bank Notes e-Signature redPAY Payment Options

This guardian has 1 contacts [+ Create New Contact](#)

| Type | Name | Home Phone | Work Phone | Mobile Phone |
|-------------|-------------|--------------|------------|--------------|
| Grandparent | Del Rodgers | 07 1234 5678 | | |

[Edit](#)

Click the arrow button and select e-Signature:

This guardian has 1 contacts [+ Create New Contact](#)

| Type | Name | Home Phone | Work Phone | Mobile Phone |
|-------------|-------------|--------------|------------|--------------|
| Grandparent | Del Rodgers | 07 1234 5678 | | |

1

- e-Signature**
- View
- Delete

Tick enable e-Signature access and authorise for pickup. Enter a start date (only include an end date if you wish to end the permission on this date). Save the record:

e-Signature ✕

Name Email *

Enable e-Signature Access Authorise for Pickup

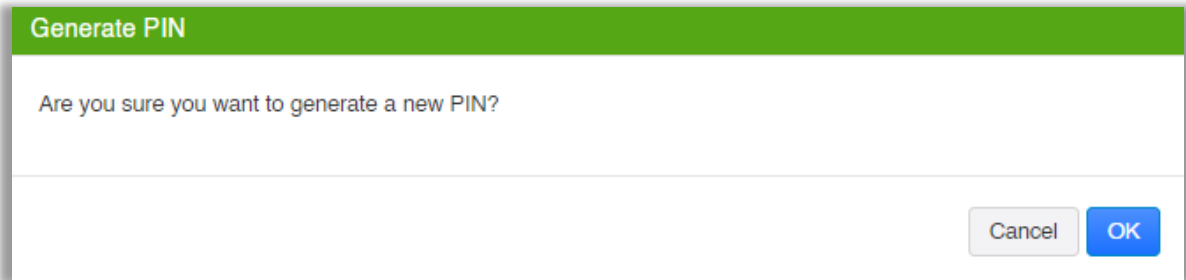
Start Date * End Date

PIN *

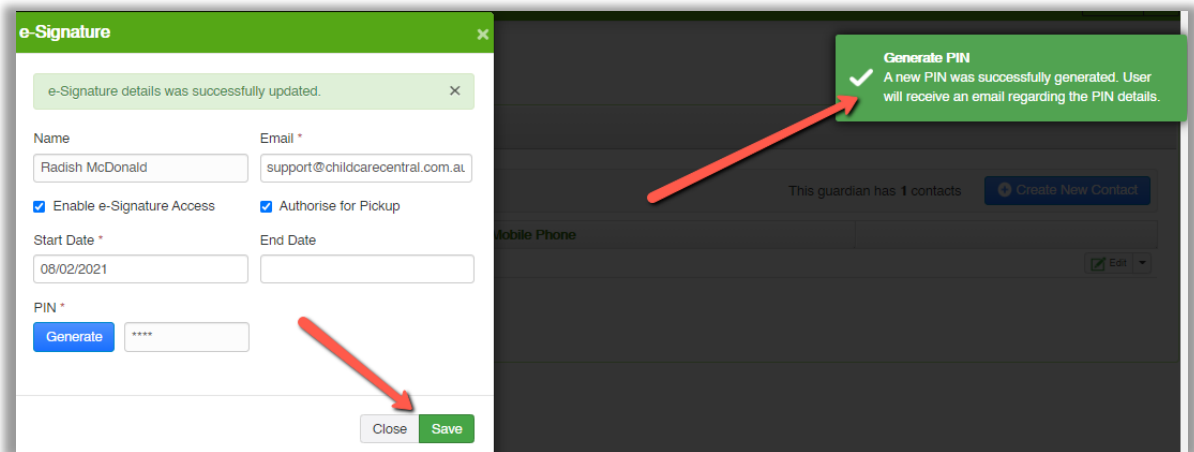
Detailed cont.

You will notice that the **Generate** button may now be clicked. Click this button.

You will then receive a confirmation message, click OK



You will receive a successful message. You may now **save** and **close** the record:



You may repeat this process for as many family contacts as required.

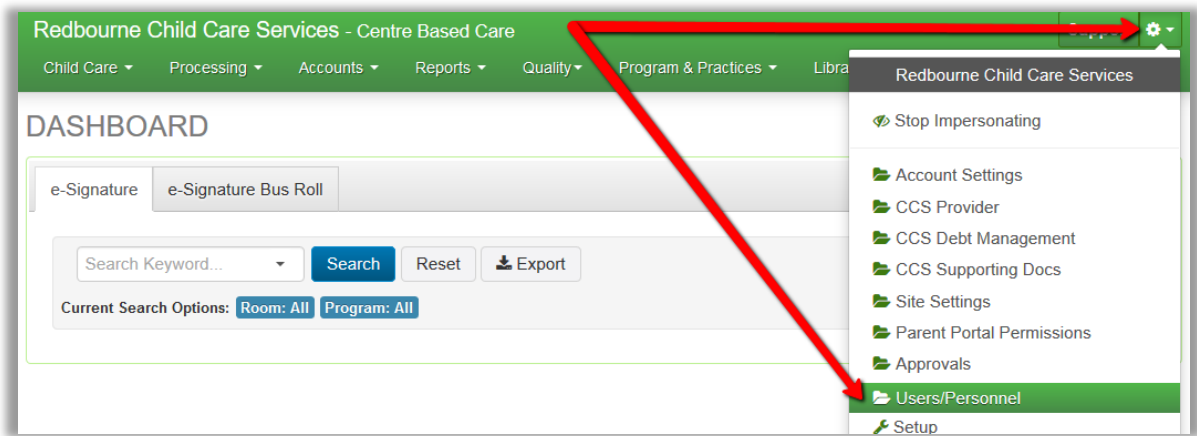
Service Staff

Personnel at your child care service may also be issued e-Signature PINs to sign children in and out with.

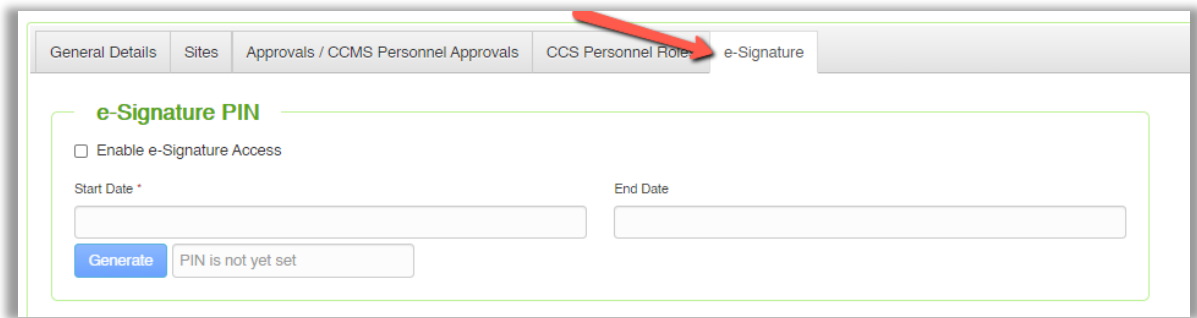
NOTE: You will need to create 'user access' under the general details tab prior to generating a PIN.

To issue a PIN for a service user, open the Settings cog and select Users/Personnel:

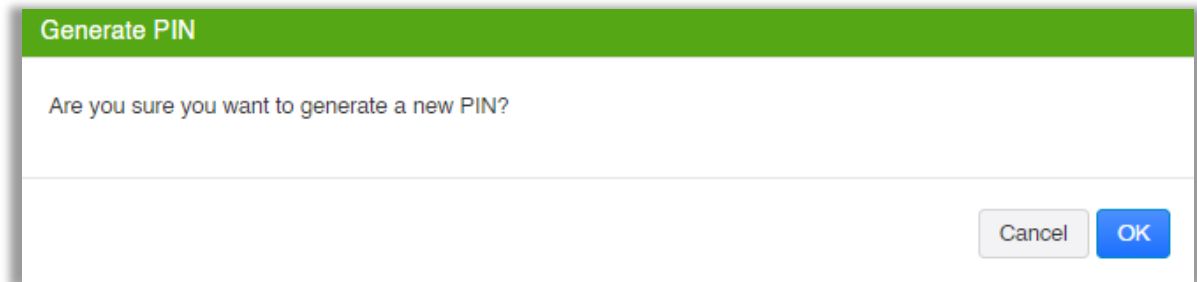
Detailed cont.



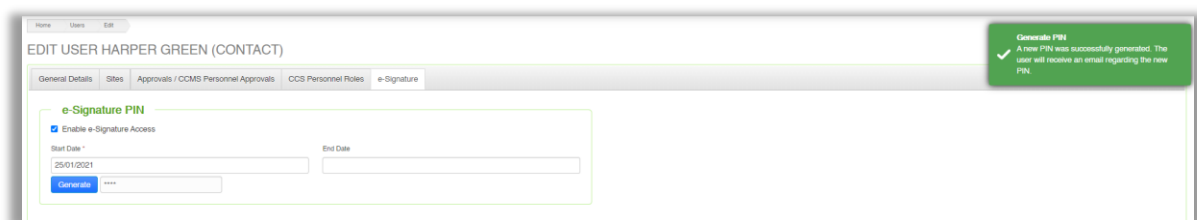
Select a user from the list and click the Edit button. Click on the e-Signature tab:



Click the Generate button. You will then receive a confirmation message, click OK



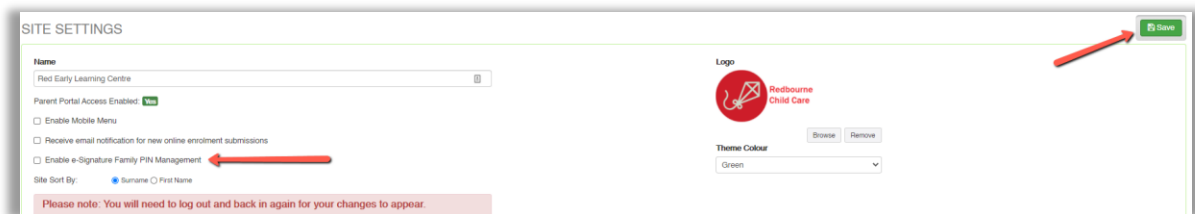
This will send the user an email containing their e-Signature PIN and you will receive a successful message:



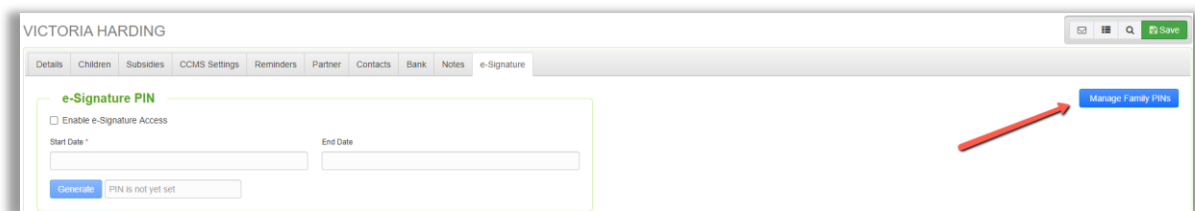
Detailed cont.

Family Pin Management

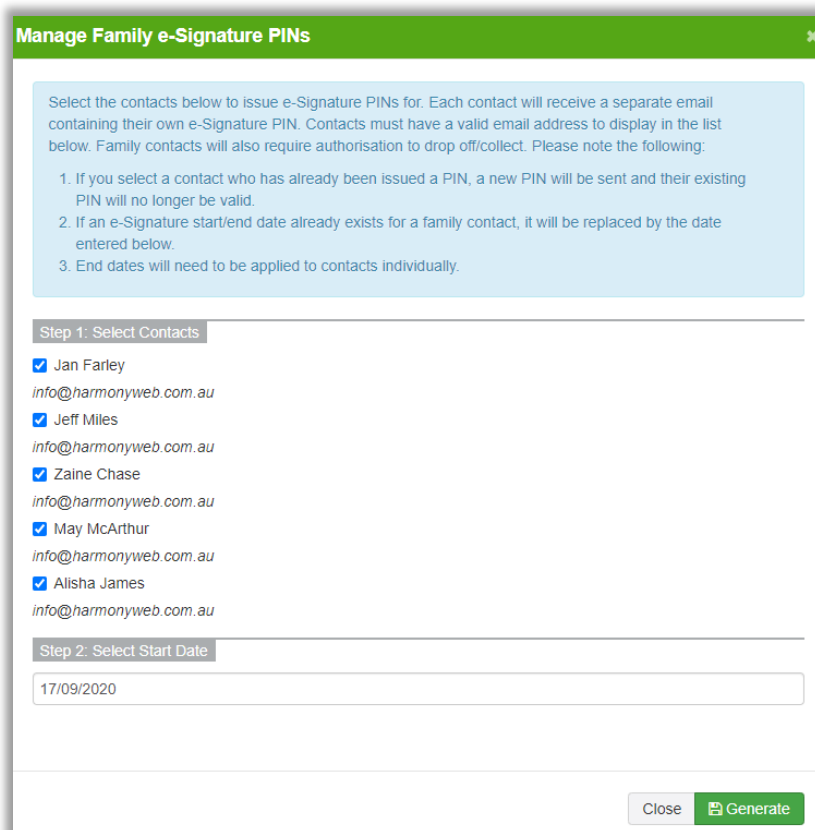
You first need to start by turning on this feature. Click on the settings cog – select site settings and click Enable e-Signature Family PIN Management and click Save



To use this function, navigate to the Parent/Guardian record, and select the e-Signature tab. Within the e-Signature tab click Manage Family PINs button:



The following window will open:

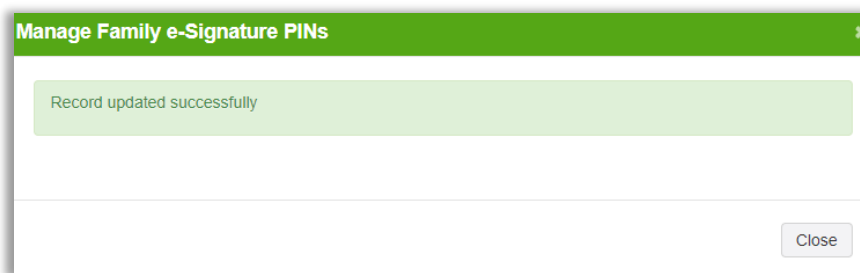


Detailed cont.

NOTE: Parent/guardian, partner and contacts need a valid email address in their record to display in the list.

All records will automatically be selected with the start date as the current date however this can be changed either by unticking records you don't want to generate pins for and/or changing the start date.

Then click **Generate**.

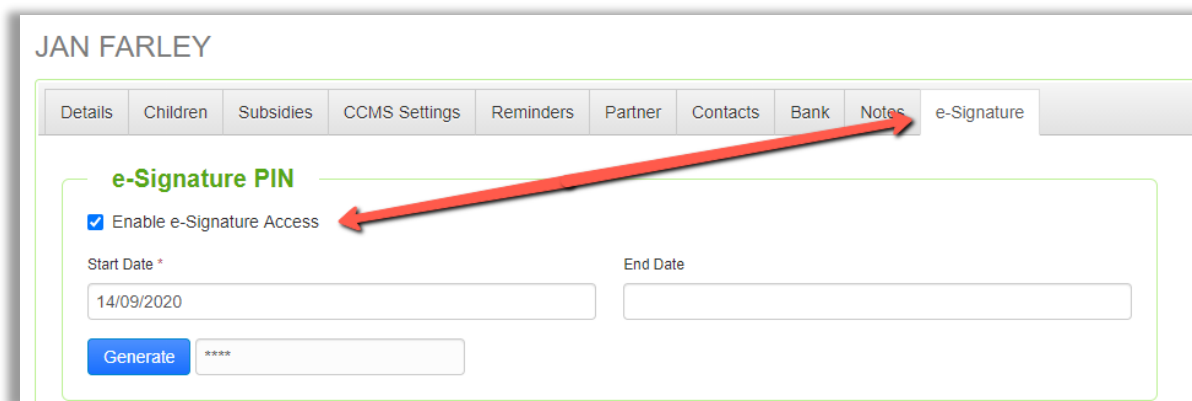


The parent/guardian, partner and contacts will all now receive separate emails with the e-Signature PIN number.

In your software the following will now be updated:

Parent

The e-Signature tab is updated.



Detailed cont.

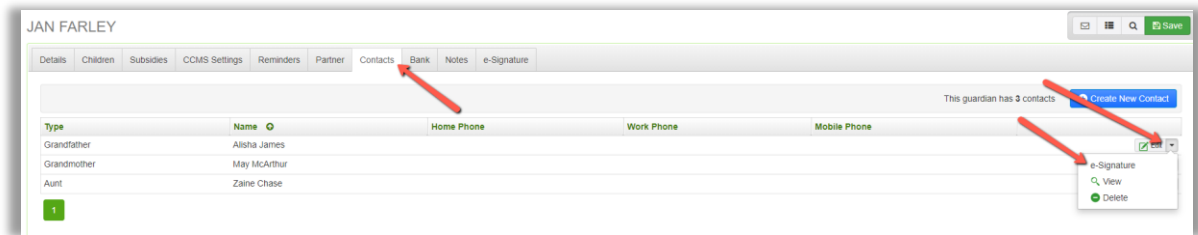
Partner:

Partner tab updated:



Contacts

Contact e-Signature data is updated:



e-Signature ✕

Name

Email *

Enable e-Signature Access

Authorise for Pickup

Start Date *

End Date

PIN *

Generate

Close
Save

Detailed cont.

Important Notes

- If you select a contact who has already been issued a PIN, a new PIN will be sent and their existing PIN will no longer be valid.
- If an e-Signature start/end date already exists for a family contact, it will be replaced by the date entered below.
- End dates will need to be applied to contacts individually.

Parent/guardian, partner and contacts need a valid email address in their record to display in the list.

In addition the contact also requires the authorisation to drop off/collect:

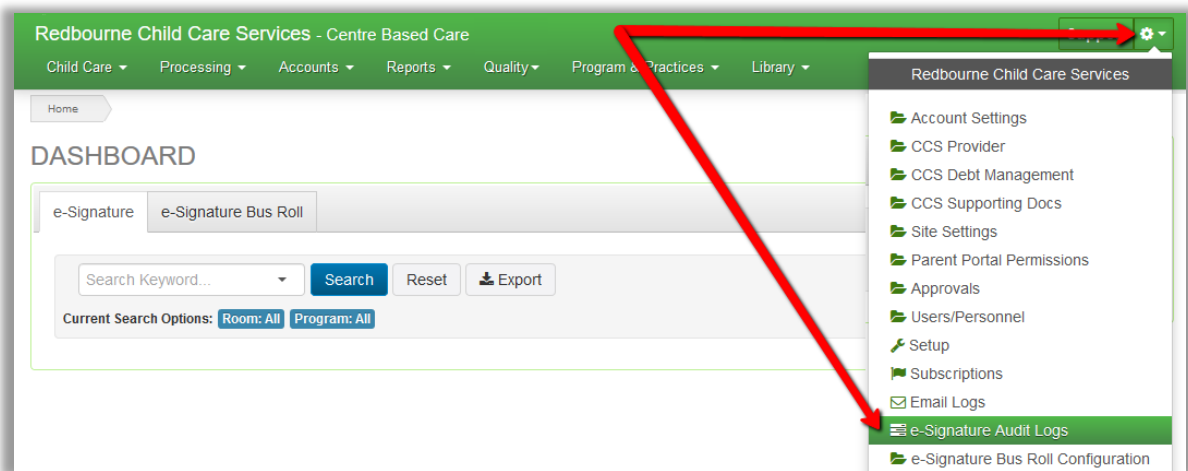
| | | |
|---|--------------|------------------------|
| Type | Name | Email |
| Grandfather | Ricky Benton | info@harmonyweb.com.au |
| Home Phone | Mobile Phone | Work Phone |
| | | |
| Address | | |
| Address Line 1 | | |
| | | |
| Suburb | | |
| | | |
| State | Postcode | |
| Select... | | |
| Authorisations | | |
| <input checked="" type="checkbox"/> Do you authorise this person to drop off and collect your child/ren on your behalf? | | |
| <input type="checkbox"/> Do you authorise this person to consent to medical treatment and/or authorise administration of medication to your child on your behalf? | | |

Detailed cont.

e-Signature Audit Log

The e-Signature Audit Log will display updates made to data relating to e-Signatures.

To open the e-Signature Audit Log, click the **settings cog** and select **e-Signature Audit Log**:



This will open the Audit Log screen:

The screenshot shows the 'E-SIGNATURE AUDIT LOGS' screen. It features a search bar and a table with the following columns: Date Created, Updated By, User Type, User, Action Type, and Active. The table displays 20 entries, with a 'View Data' button next to each row.

| Date Created | Updated By | User Type | User | Action Type | Active |
|--------------|------------|-----------------|------------------|--------------------------------|--------|
| 16/02/2021 | G Kylie | User/Personnel | Green Harper | Update e-Signature Permissions | Yes |
| 16/02/2021 | G Kylie | User/Personnel | Green Harper | Update e-Signature Permissions | Yes |
| 16/02/2021 | G Kylie | Guardian Family | Radhah McDonald | Update e-Signature PIN | Yes |
| 16/02/2021 | G Kylie | Guardian Family | Radhah McDonald | Update e-Signature Permissions | Yes |
| 16/02/2021 | G Kylie | Guardian Family | Radhah McDonald | Update e-Signature PIN | Yes |
| 16/02/2021 | G Kylie | Guardian | Bradford Kaya | Update e-Signature PIN | Yes |
| 15/02/2021 | Moyer K | User/Personnel | Henderson Indigo | Update Email Address | Yes |
| 15/02/2021 | G Kylie | User/Personnel | G Kylie | Update Bus Roll Configuration | Yes |
| 24/11/2020 | G Kylie | User/Personnel | G Kylie | Update Bus Roll Configuration | Yes |
| 20/11/2020 | M Clare | Guardian Family | Sarah Connor | Update e-Signature PIN | Yes |
| 20/11/2020 | M Clare | Guardian Family | Sarah Connor | Update e-Signature Permissions | Yes |

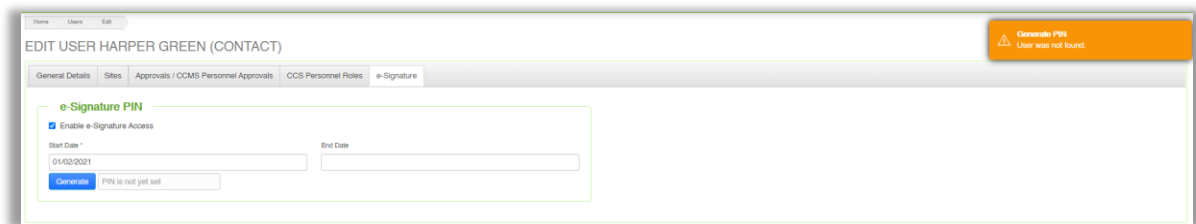
To view further details, click the **View Data** button.

Please note that this option will not be available for PIN updates, as the PIN value is confidential.

GENERATING AN E-SIGNATURE PIN

Troubleshooting

Issue: I'm trying to generate pin for a staff member and getting error:



Why? The staff user needs to have user access enabled in order for you to generate a pin. You do not need to give the user their log in details, it just needs to be enabled.

Resolution:

1. Go back to the general details tab
2. Tick Grant system access
3. Enter a username
4. Tick Active
5. Save.

If you are giving the user log in details, complete the process by clicking on on Send Password reset email and applying a site role.

For further instructions on how to set up a user please see the tip sheet called **User, User Permissions & CCS Personnel**.

Issue: I want to change my pin number; how do I do this?

Resolution: When receiving a Pin via email, the email will contain a link to reset the PIN. This link is active for 72 hours. If the PIN is not reset, the PIN on the email will need to be used or a new PIN will need to be issued to provide the person with a new reset PIN link.

Troubleshooting cont.

Issue: A parent/guardian, partner or family contact, service user forget their PIN, how can I help them?

Resolution: You may issue the person a brand new PIN by following the below processes – clicking the **Generate** button for the parent/guardian, partner etc. The new PIN may then be used to sign in and out with.

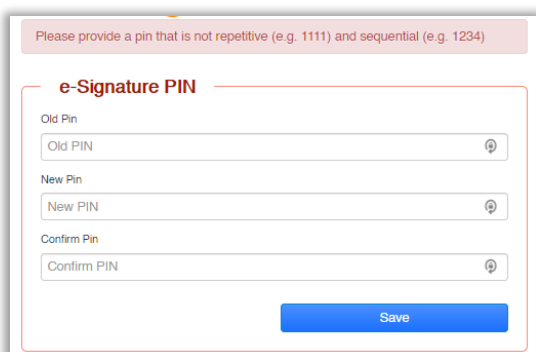
Issue: We are getting an invalid error when trying to sign in a child

Resolution: The invalid message is a true error and can happen for a few reasons:

1. The internet has dropped out for a few seconds and not connected properly.
2. The person isn't selecting their own name (maybe accidentally selecting a parent/partner's name) before trying to sign in, therefore the PIN doesn't relate to the person selected.
3. User may have accidentally entered the wrong PIN. If a PIN is entered incorrectly 5 times consecutively, it will become locked and the user will receive a message stating that their PIN is now invalid. If this occurs, a new PIN may be issued by clicking the **Generate** button for the parent/guardian, partner etc.
4. Auto fill may be turned on in your web browser settings therefore prefilling a incorrect PIN. We highly recommend turning this off in your web browser.

If the PIN has been locked due to too many incorrect attempts, please contact your service as they will need to generate a new PIN to the family

Issue: I'm trying to change my pin but I'm getting an error:



Please provide a pin that is not repetitive (e.g. 1111) and sequential (e.g. 1234)

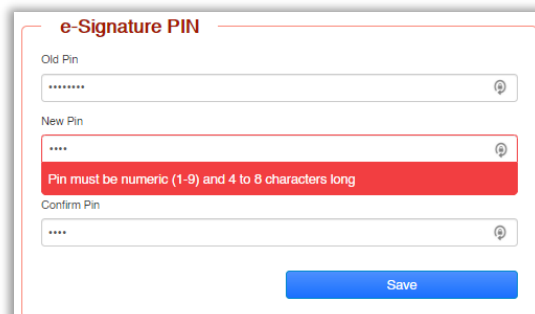
e-Signature PIN

Old Pin

New Pin

Confirm Pin

Save



e-Signature PIN

Old Pin

New Pin

Pin must be numeric (1-9) and 4 to 8 characters long

Confirm Pin

Save

Resolution: There are some rules around creating a new pin: PINs may be 4 - 8 digits long, may not contain sequential or repeated numbers (eg 1234 or 1111) and must not contain a zero.

Troubleshooting cont.

Issue: I'm trying to change my pin but I'm getting an error saying my old pin is incorrect and I don't remember my old pin

Old pin is incorrect

Resolution: The old pin we are referring to here is the PIN you just received in the email.

Q: Are PINs confidential?

A: PINs are secured using encryption technology. Your PIN should never be shared with anyone else to ensure fraudulent data is not being submitted to the government.

Q: What does the PIN email look like?

A:

Hi Kaya ,

Your Service has implemented a new technology platform designed to streamline communication and administration processes with families. One of the important components of this is the introduction of electronic signatures (or e-Signatures).

You have been given access to e-Signature for Red Early Learning Centre.

PIN: 29483671

Start Date: 16/02/2021

End Date:

Click on the following to [Reset PIN](#)

Please note that PINs may be 4 - 8 digits long, may not contain sequential or repeated numbers (eg 1234 or 1111) and must not contain a zero.

The Reset PIN link is active for 72 hours.

Your PIN should never be shared with anyone else.

Regards,
Red Early Learning Centre