MANAGE FAMILY
E-SIGNATURE PINS

This option allows service to enable e-Signature PINs for multiple contacts at a time. This will include Parent/Guardian, Partner, Family Contacts

- **Family Pin Management**
- **Important Notes**
- **e-Signature Audit Log**
- **Troubleshooting**

Summary

Turn on feature

1. Click on the settings cog
2. Select Site Settings
3. Tick Enable e-Signature Family PIN Management
4. 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

MANAGE FAMILY E-SIGNATURE PINS
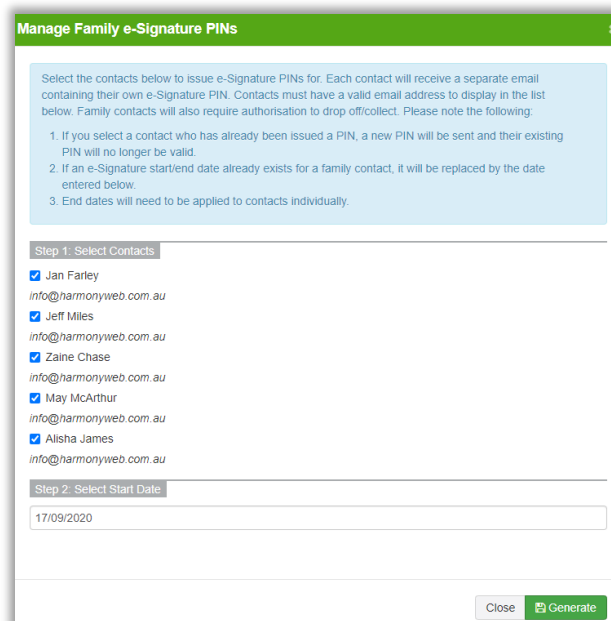
Detailed

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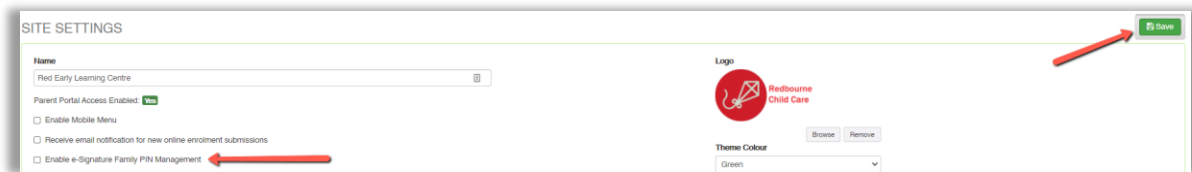
To use this function, navigate to the **Parent/Guardian** record, and select the **e-Signature** tab. Within the e-Signature tab click **Manage Family PINs** button:
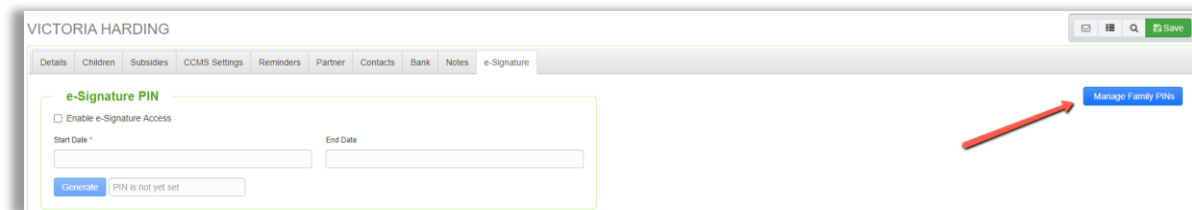

The following window will open:

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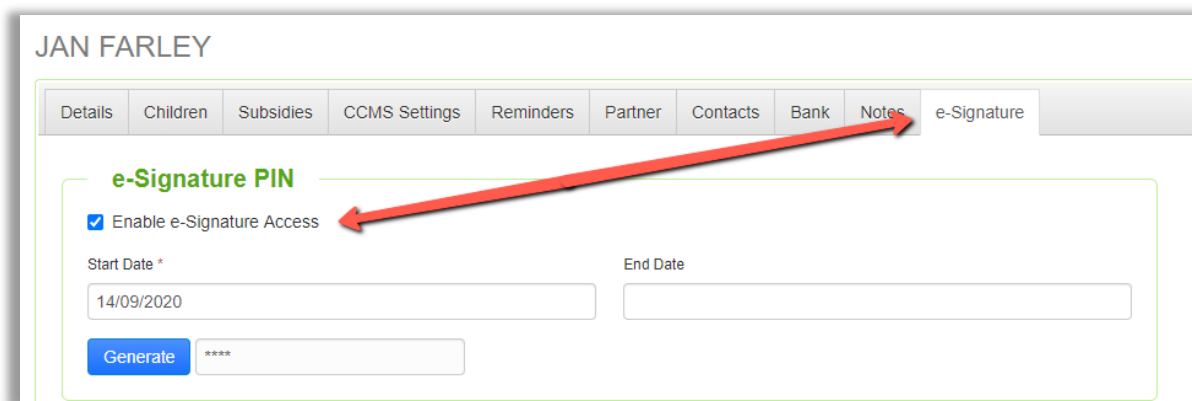
Then click **Generate**.
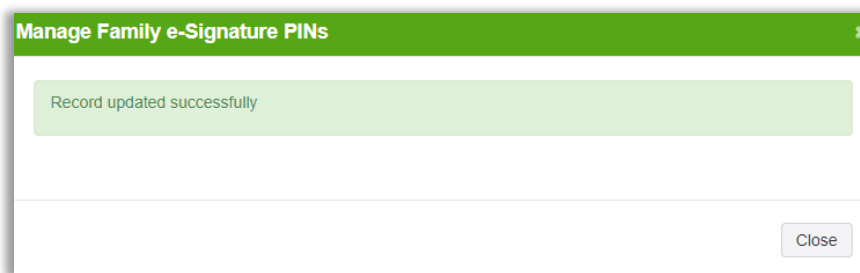
The parent/guardian, partner and contacts will all now receive separate emails with the e-Signature PIN number.

In your software the following will now be updated:

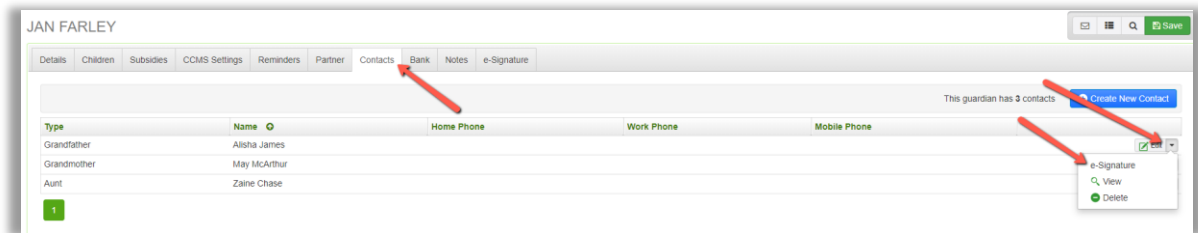## Parent

The e-Signature tab is updated.

Detailed cont.

Partner:

Partner tab updated:

Contacts

Contact e-Signature data is updated:

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:
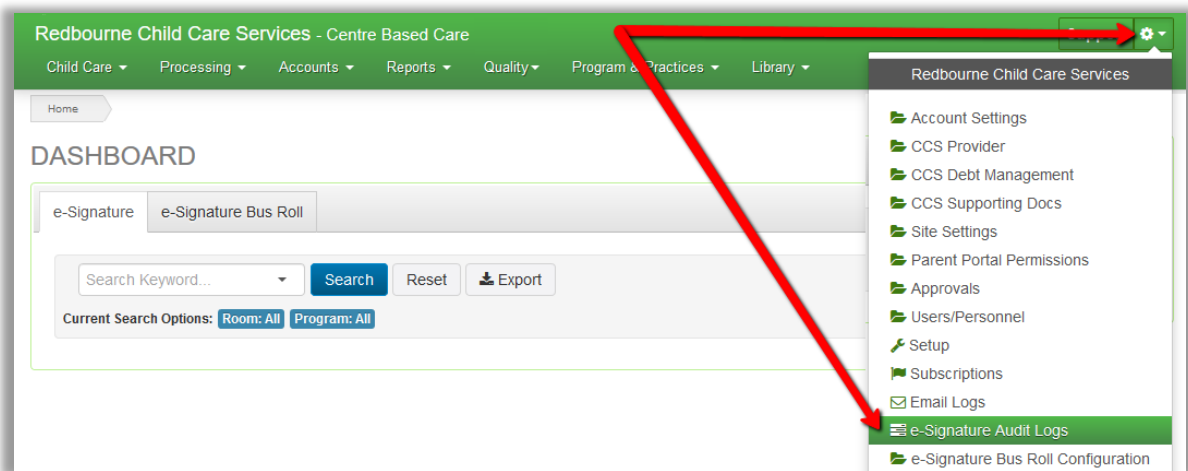
Detailed cont.

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:

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.

MANAGE FAMILY E-SIGNATURE PINS

Troubleshooting

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.

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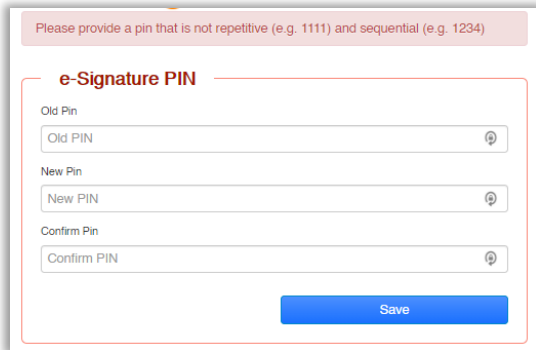
Issue: I'm trying to change my pin but I'm getting an error saying my old pin is incorrect and I don't remember my old pin

Old pin is incorrect

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

Troubleshooting cont.

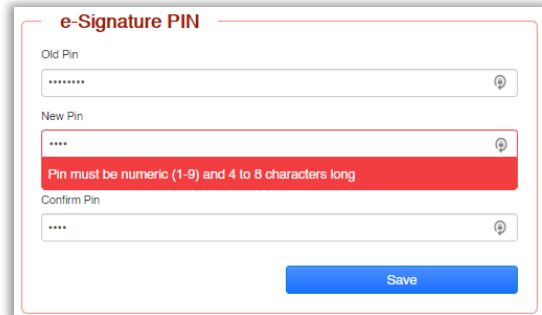Issue: I'm trying to change my pin but I'm getting an error:

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.