PREREGISTRATION

To activate Preregistration, you need to create a code for your site.
 See the section below: **Configuring Pre-Registration:**

The public facing URL is: http://www.pwhdev.net/AngelWebSQL/loginangel.html

When you notify clients that pre-registration is available for Angel Tree, include the unique code for your site.
In the example, 'Large' is the code for the demo site.

After entering the code, the applicant will select either English or Spanish and click on Begin.

If you have selected to assign follow-up appointment times, then they would then select a time from the next screen.

Otherwise, it takes you to the one-page Pre-Registration page.

If follow-up appointment times are published, then the Client would pick from the available times

If the configuration option is turned off for follow-up appointments, then the system would bypass this screen.

LargeCorps

The Salvation Army

DOING THE MOST GOOD

Select and click on the interview date and time to use for your follow-up interview.

(Look thru all pages for open appointment times)

- -
Appointment times

Date / Time / Nbr Available	Date / Time / Nbr Available	Date / Time / Nbr Available
12/12/2020, 09:00 AM, - - 39	12/12/2020, 09:30 AM, - - 40	12/12/2020, 10:00 AM, - - 40
12/12/2020, 10:30 AM, - - 40	12/12/2020, 11:00 AM, - - 40	12/12/2020, 11:30 AM, - - 40
12/12/2020, 12:00 PM, - - 40	12/12/2020, 01:00 PM, - - 40	12/12/2020, 01:30 PM, - - 40
12/12/2020, 02:00 PM, - - 40	12/12/2020, 02:30 PM, - - 40	12/12/2020, 03:00 PM, - - 40

Cancel

Depending on the situation, the interview can be
- Over the phone
- By email
- Via video conference such as zoom
- Drive-by for ID Verification (show the documents thru the closed car window)
- Walk-up ID check (plexiglass and appropriate safety
- In Person Interview

After selecting the interview date and time, the applicant would then fill in the blanks of the one-page form to start the registration process
Note the addition of three new Covid 19 questions:
1. Have you registered for Angel Tree in the past 3 years?
2. Are you adding any new children to the application?
3. Have you moved in the last year?

The intention of these questions is to reduce the number of in-person interviews required. If they have previously registered and are not adding any new children and have not moved, then we might assume that they have already done child verification in the previous years so perhaps you can have a policy for this year to skip ID Validation for this year.

The Pre-Registration screen
There are clickable instructions on the form in both English and Spanish

Preinscripción de Ángel

Haga clic para mostrar / ocultar las instrucciones

Adultos 0   + Niños: 0   = Tamaño de familia: 0

Direccion de casa:

Código postal: (requerido)

None selected

Número de contacto 123-456-7890   Segundo número de contacto: Trabajo: 789-012-3456
                                      456-789-0123

Ciudad: Estado: Seleccionado Ninguno   Condado:

Dirección de correo electrónico

Enter email

Nunca compartiremos su correo electrónico con nadie más. Podemos utilizar esta información para comunicarnos con usted acerca de su solicitud.

Toggle to view/hide the instructions

Preinscripción de Ángel

Fecha / Hora de Cita: None   None

Haga clic para mostrar / ocultar las instrucciones

Complete esta pantalla con información sobre su familia y los niños que solicitan asistencia de Angel Tree.

Haga clic en Enviar preinscripción cuando haya finalizado y recibirá una identificación de preinscripción y la fecha / hora de la cita para completar el proceso de inscripción.

Si se muestran las opciones de Regalo / Necesidad, sugiera hasta 3 ideas: se permiten 15 caracteres para cada categoría por niño.

Si se muestran las opciones de Ropa, seleccione un tamaño y tipo apropiado para cada - (M) Masculino, (F) Femenino, (A) Todos

Si tiene más de 6 hijos de Angel Tree, estos se agregarán durante el proceso de revisión de la solicitud.

Es posible que se le solicite que proporcione una identificación adecuada para cada niño durante esta entrevista (consulte los detalles en la página de preinscripción completada).

NOTA: Si comete un error, no agregue otra Preinscripción. Esto será corregido durante la entrevista.

Adultos + Niños = Tamaño de familia

English version:

Angel PreRegistration

Click to show/hide Instructions

Adults: 0   + Children: 0   = Family Size: 0

Home Address:

Zip: (required)

None selected

Contact number: 123-456-7890   Secondary contact number: 456-789-0123   Work: 789-012-3456

City: State: None selected   County:

Instructions:

Angel PreRegistration

Appointment Date/Time: None   None

Click to show/hide Instructions

Please complete this screen with information about your family and the children that are applying for Angel Tree assistance.
Click on Submit Pre-Registration when completed, and you will receive a pre-registration ID and appointment date/time to complete the registration process.
If Gift/Need options are shown, suggest up to 3 ideas - 15 characters allowed for each category per child.
If Clothing options are shown, select an appropriate size and type for each - (M)Male, (F)Female, (A)All
If you have more than 6 children of Angel Tree age, these will be added during the application review process.
You may be asked to provide appropriate identification for each child during this interview (See details on Pre-Registration Completed page).
NOTE: If you make a mistake, please don't add another Preregistration. This will be corrected during the interview.

Adults+Children=Family Size:

0   0   0

Home Address:

The client competes the form for up to 6 children.
If configured, there will be areas for up to 3 sets of Gift and need suggestions.
It displays the Label you have setup for the 'Angel' type application.
There can also be up to 5 Clothing suggestions with Size and Type for each. The list of Clothing
Types also comes from how you configure that option on the Corps/Unit Setup page.
Note, Spanish types are shown when that language option is selected. The values stored are the
matching English types.

After completing the form, they click on Submit Pre-Registration.

If the configuration option for uploading documents is disabled, then the Client is all done and it completes the pre-registration process and gives them their preregistration ID and appointment time (if configured).

These messages are configurable in AngelWeb so you can customize what is shown to the applicant. There is a set of English and a set of Spanish to configure.

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Preinscripción de Ángel Completada.

Gracias por completar el proceso de preinscripción de Angel Tree.

El siguiente paso es una revisión realizada por el asistente social de Angel Tree   **Print**

Su código de preinscripción es: **LG0228**

Jefe de hogar Apellido: **Fernandaze, Jose2**

Lleve los siguientes artículos cuando complete su solicitud: Identificación válida con foto 2. Tarjeta de Seguro Social / Tarjeta del Consulado o comprobante de identificación fiscal. Número 3. Factura actual de servicios públicos o correo recibido de la escuela / gobierno en agosto o septiembre.

Para cada niño que se está registrando: 1. Certificados de nacimiento Y tarjetas de seguro social / tarjeta del consulado. 2. Tallas de ropa y calzado para cada niño. 3. Documentos oficiales de custodia o tutela si el solicitante no es el padre biológico.

Prueba de necesidad: debe traer UNO de los siguientes en el nombre del solicitante. - Sección 8 o documentos de arrendamiento de HUD - Carta de elegibilidad para Medicaid o SNAP. Si no recibe la asistencia gubernamental anterior , traiga comprobante de sus ingresos y gastos mensuales.

Si tiene alguna pregunta, póngase en contacto con la oficina._ Por correo electrónico: Sal.Army@uss.salvationarmy.org por teléfono: 800-555-1212

Done

============

Thank you for completing the Angel Tree PreRegistration process..

The next step is a review by with the Angel Tree Case Worker.   **Print**

Your PreRegistration code is: **LG0241**

HOH Name: **Fernandaze, Jose**

Please bring the following items with you when you come into complete your application: Valid Photo ID 2. Social Security Card / Consulate Card or proof of Tax I.D. Number 3. Current utility bill or mail received from school/government from July or August.

For each child being registered: 1. Birth Certificates AND Social Security Cards / Consulate Card. 2. Clothing and shoe sizes for each child. 3. Official custody or guardianship papers if applicant is not the biological parent. There will be a Drive-Thru day on Friday and Saturday, September 11-12 between 8:30 AM and 4 PM to safely display the ID cards thru the car window.
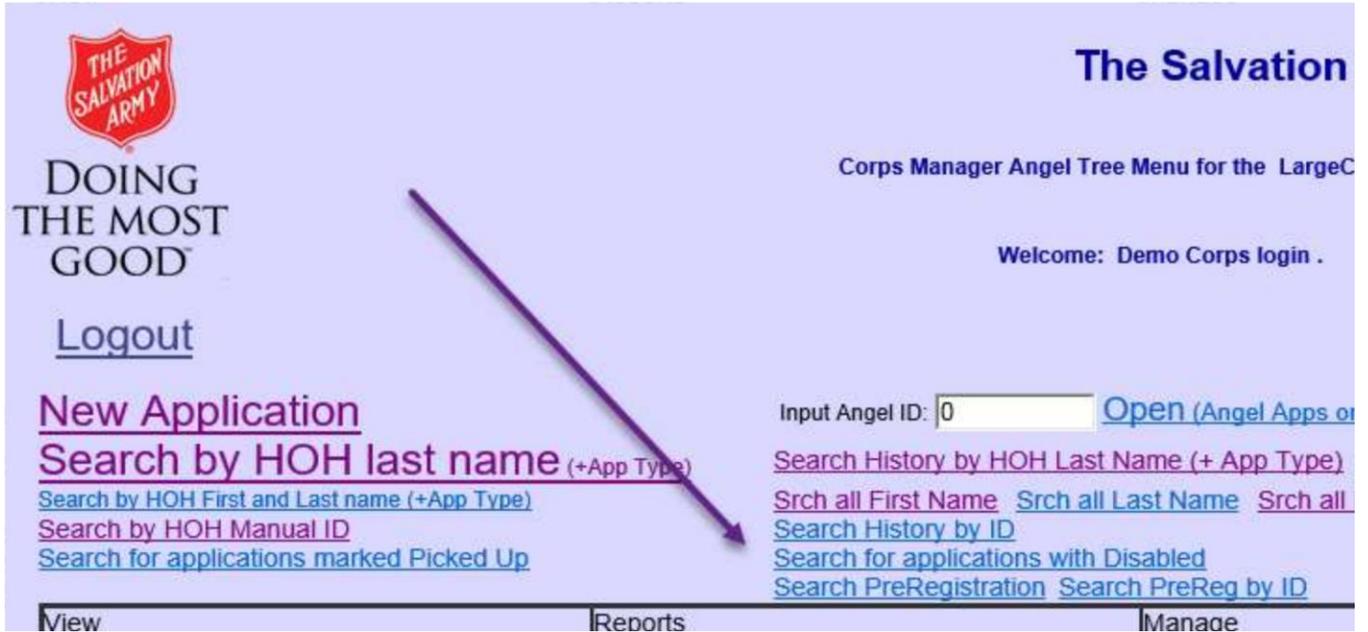
Proof of Need: Must bring ONE of the following in the applicants name. - Section 8 or HUD lease documents - Medicaid or SNAP eligibility letter. If you do not receive the above government assistance, bring proof of your monthly income and expenses

If you have questions, please contact the office. Email: Sal.Army@uss.salvationarmy.org Phone: 800-555-1212

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Done

Enhancement for 2020 – Allow the Client to upload documents.

One thing that most sites have done in the past during the in-person interview is to verify children qualification such as birth certificate / income / other details. It is typically a 'yes I saw the ID' type of verification – not actually capturing an image of the document. This is important to be aware of the responsibility for securing sensitive information such as Driver's License, birth certificate and the such that might be used for identity theft.
NOTE: Please do not request Social Security Number if you upload documents.

However, if you are not doing in-person applications, then how to verify documents without keeping a copy on the Hosted Website Server that could be used for identity theft?
Some of the ideas that have been discussed:
1. Setup a separate TSA email address just for sending in photos of documents
2. Have a 'drive by' event to hold the documents up to the inside of the window so that you can check them off.
3. Have a Walk-up station with plexiglass and appropriate safety measures.
There is a spreadsheet report that makes it easy to check-off the family ID check has been checked. You could then take the spreadsheet and update the status on the Pre-Registration screen or just import the into a full AngelWeb application.
4. Some other way to view the information like zoom where you don't have to hold the document image in a file since THQ has said to not store things like Social Security numbers.

An enhancement has been completed to allow the Client to securely upload ID documents.
If this is active in the Pre-Registration configuration page, then the Client will be directed to a new page that allows them to upload the (Required) documents.
For HOH there are both an ID and Proof of residency documents to upload (two uploads)
For each Child, there is an ID document to upload

There are Message fields on the Pre-Registration Configuration screen where you can describe what documents are acceptable – See Below. This is available to the Client in the form of help text.

Page 2 – Document Upload

After completing the first page, if Document Upload is enabled, a second page will display that allows the Client to upload the required documents.

If working on a mobile phone or tablet the Client can use the camera to take a picture and upload. If the client selects a non-image file, it prevents if from being uploaded.

Note that there is a warning at the bottom of this page suggesting that if they take hi-res pictures, there may be a long time to upload the very large files, or a website timeout.

Once the Client has selected all of the required files, the upload completes and the Success page is displayed. These messages are configurable on the Pre-Registration setup page.

The Salvation Army

Angel PreRegistration Complete.

Thank you for completing the Angel Tree PreRegistration process..

The next step is a review by with the Angel Tree Case Worker. **Print**

Your PreRegistration code is:	**LG0271**
HOH Name:	**Smith, William**

Please bring the following items with you when you come into complete your application: Valid Photo ID 2. Social Security Card / Consulate Card or proof of Tax I.D. Number 3. Current utility bill or mail received from school/government from July or August.

For each child being registered: 1. Birth Certificates AND Social Security Cards / Consulate Card. 2. Clothing and shoe sizes for each child. 3. Official custody or guardianship papers if applicant is not the biological parent. There will be a Drive-Thru day on Friday and Saturday, September 11-12 between 8:30 AM and 4 PM to safely display the ID cards thru the car window.

Proof of Need: Must bring ONE of the following in the applicants name. - Section 8 or HUD lease documents - Medicaid or SNAP eligibility letter. If you do not receive the above government assistance, bring proof of your monthly income and expenses

If you have questions, please contact the office. Email: Sal.Army@uss.salvationarmy.org Phone: 800-555-1212

Done

Working with Pre-Registration applications – Verifying Documents.

In the AngelWeb application, when the case worker wants to review the Pre-Registration Application, they can search by name or ID:

Click on the Search Preregistration or Search PreReg by ID links:

Locate and select the application. It shows you weather the applicant chose English or Spanish during the entry process. You can also organize your work by selecting a particular status.

The Salvation Army - PreRegistration Applications.

- LargeCorps [0188] Duncan, Mary (3 in family) 143 Kent Drive Smallville Appt: 10/19/2020 At 12:30 PM (English) [Available]
- LargeCorps [0174] Dunkleberger, Lisa (5 in family) Po Box 27 Smallville Appt: 10/19/2020 At 12:00 PM (English) [Available]
- LargeCorps [0190] Eaves, Gina (3 in family) 236 Westview Avenue Smallville Appt: 10/19/2020 At 12:30 PM (English) [Available]
- LargeCorps [0133] Elliott, Jennifer (4 in family) 218 Walnut St Smallville Appt: 10/19/2020 At 11:00 AM (English) [Available]
- LargeCorps [0128] Epperson, Belinda (3 in family) 3639 Rocky Branch Rd Smallville Appt: 10/19/2020 At 11:00 AM (English) [Available]
- LargeCorps [0011] Farmer, Claudia (5 in family) P O Box 6 Smallville Appt: 10/19/2020 At 9:00 AM (English) [Available]
- LargeCorps [0121] Farmer, Jessica (4 in family) Fork Ridge P O Box 6 Smallville Appt: 10/19/2020 At 11:00 AM (English) [Available]
- LargeCorps [0227] Fernandaze, Bianca (2 in family) 123 my street Large Appt: 10/19/2020 At (Spanish) [Imported]
- LargeCorps [0230] Fernandaze, Jose (2 in family) 123 my street Large Appt: 10/19/2020 At (Spanish) [Imported]
- LargeCorps [0226] Fernandaze, Jose (2 in family) 123 my street Large Appt: 10/19/2020 At 08:15 AM (Spanish) [Available]
- LargeCorps [0243] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0244] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0245] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0246] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0251] Fernandaze, Jose (2 in family) 123 Large Appt: (English) [Available]
- LargeCorps [0252] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0249] Fernandaze, Jose (2 in family) 123 my street Large Appt: (English) [Available]
- LargeCorps [0263] Fernandaze, Jose (2 in family) 123 Large Appt: (English) [Available]
- LargeCorps [0264] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [Available]
- LargeCorps [0265] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [Available]
- LargeCorps [0266] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [Available]
- LargeCorps [0267] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [ID Check]
- LargeCorps [0268] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [ID Check Returned by Client]
- LargeCorps [0269] Fernandaze, Jose (2 in family) 1 Large Appt: (English) [Available]
- LargeCorps [0270] Fernandaze, Jose (2 in family) 123 Large Appt: (English) [Available]

Previous   1 2 3 4 5 6 7 8 9 10   Next

Limit to this Pre-Reg Status: [ALL ⌄]   [   ]   [Search]

ALL
(Enter 1 or more letters of H(Available
- - - - - - - - - - - - - - - Approved, Ready to Import
Search by ID   Imported
                               Rejected
Return to Main Menu   Duplicate
                               Cancelled
                               ID Check
                               History
                               Review
                               Has More Children
                               ID Check Returned by Client

Importing a Pre-Registration application into a completed AngelWeb application is similar to importing from History. The screen lists the HOH and children names and ages.
There is a Status screen that can be set as you work to verify the information.
Each Child also has a status that can be set. Click on Update Status. (#1)

This screen also looks for potential matches in history so you can review previous historical applications before importing the pre-registration. (#2)

You can click on the link to copy/paste to email to open a new window that will allow you to copy the information to your email and interact with the Client in this way. (#3)

If there are documents uploaded, you can see the count for each Child.

Click on Update Status to work with the Application status as well as the status of each Child.

You can change the overall status of the Application and also the status of each child.
If you review the documents and decide that different document is required for one or more children, then you can check the box and set the status to ID Check. This will enable sending a link to the Client and have them upload new documents just for those children.

PreRegistration ID: (LG0252) NOTE: App Type: (Angel)

PreReg Status:	ID Check ⌄ [View Uploaded Documents]
Comments (80 Characters allowed)	Billy OK, Requesting new Doc for Sally
HOH: (William)	Request New HOH ID Document ☐
	Request New Residency Doc ☐ Uploaded Documents for HOH: 2
Child 01 Status (Billy - Age: 5):	ID check Completed OK ⌄
	Request New Child Document ☐ Uploaded Documents: 1
Child 02 Status (Sally - Age: 1):	ID Check Requested ⌄
	Request New Child Document ☑ Uploaded Documents: 1
Child 03 Status:	Not Available
Child 04 Status:	Not Available
Child 05 Status:	Not Available
Child 06 Status:	Not Available

NOTE: Setting child status to ID Check Requested will automatically save the PreReg Status to: **ID Check.**
This will also activate the URL for requesting a new document upload in copy/paste (if actve on your site).
To change the PreReg Status to something else, make sure to change all Child status to something else as well.
To request either of the HOH documents, check the box and change the status of the application to: **ID Check**

The Salvation Army	[Return to Search] [Return to Menu]	[Save and Return]

If the User has security to view documents, the button is enabled. You can click on the button and view the list of documents.

You can click on any document and view the uploaded document.

The documents are protected by a 30-character token key. The documents are stored ONLY in the database – not in any directory.

- You can view and delete the uploaded document from this screen.
- As Pre-Registration applications are imported to live AngelWeb applications, any uploaded documents associated with it are deleted automatically.
- After a 45 days, documents are also automatically deleted.

Requesting more information from the Client

There is also a link that you can use to copy/paste a plain-text version into email if you need to communicate with the client before importing the application.

If Document Upload is active and the user has security, then there also English and Spanish text and links to allow the Case Worker to copy the Client information into an email and then customize what they want from that Client.

When ready, you can complete the application process, filling in any details needed for the HOH and each child.

If completing via Phone or email, you would just fill in the required information not captured from the preregistration process and verifying ID Documents if needed.
Then during the interview process, the case worker / volunteer / school admin would confirm the rest of the details – income verification (if needed), answering any Family or child questions that are configured. During this process, the family Angel ID would be assigned as well as the date and time to pick up the toys.

Your intake person would be able to select the preregistration form and begin a new application. You would still step thru the application like you were doing in in person, but some of the fields would be automatically filled in from the preregistration form. Other questions like: 'Birth Certificate Y/N' would need to be answered as you process thru the application process. That is where the ID verification policy would come in.

NOTE: You may choose to disable some of these questions for this year to streamline the application process.

There is no connection between the previous year's application history and the simple one-page preregistration form so if you needed to look that up you would follow the link to History or go to the main menu and search history directly

Either approach can be used to create a new AngelWeb application – starting from history or starting from preregistration – but the two cannot be automatically merged.

If they have not completed the form, then you may need to do the interview (over the phone / email / zoom / …)

Configuring Pre-Registration:

Start with Manage Corps/Unit setup and then click on Setup Pre-Registration Messages.
To activate Preregistration, you need to create a code for your site:

The Pre-registration display is going to show the Angel questions (the 3 wishes) and the clothing questions configured for the site.

You can turn on or off options. At the moment they are tied together so having them on for applications means they show up in Pre-Registration.

If you want to enable them for applications later – after pre-registration is done, then you can do that and they will be available again.

See the screen shots below.

For example, if you only wanted to ask for a single Gift Wish and no clothing so that Pre-Registration showed only this, then you would make these configuration updates:

And set all of the clothing options to NO (at least temporarily to hide on thePre-Registration form.

On the Pre-Registration setup screen, fill in both the English and Spanish messages

Use Clothing 5	(Coat) Yes ▾

Pre-Registration Msg 1

Please bring the following items with you when you come into complete your application: Valid Photo ID 2. Social Security Card / Consulate Card or proof of Tax I.D. Number 3. Current utility bill or mail received from school/government

[ ] characters left

from July or August.

[ ] characters left

Pre-Registration Msg 2

For each child being registered: 1. Birth Certificates AND Social Security Cards / Consulate Card. 2. Clothing and shoe sizes for each child. 3. Official custody or guardianship papers if applicant is not the biological parent.

[ ] characters left

[ ] characters left

Pre-Registration Spanish Msg 1

Lleve los siguientes artículos cuando complete su solicitud: Identificación válida con foto 2. Tarjeta de Seguro Social / Tarjeta del Consulado o comprobante de identificación fiscal.

[ ] characters left

 Número 3. Factura actual de servicios públicos o correo recibido de la escuela / gobierno en agosto o septiembre.

[ ] characters left

Pre-Registration Spanish Msg 2

Para cada niño que se está registrando: 1. Certificados de nacimiento Y tarjetas de seguro social / tarjeta del consulado. 2. Tallas de ropa y calzado para cada niño. 3. Documentos oficiales de custodia

[ ] characters left

o tutela si el solicitante no es el padre biológico.

[ ] characters left

Setting up follow-up appointments for Pre-Registration.
If you wish to configure appointment times to follow-up with the Clients,
follow these steps.
Activate the option for appointments on the Pre-Registration Messages page.
Now, on the main menu, you will find a link to configure the appointment
times.

This is the time for the Client to work with the case worker to complete the
application. .

From the menu, go to Prereg Appt. Setup to create the time slots available for
Pre-Registration:

Click on Add a Series:

Generate a number of appointments for a date. Select a starting and ending time.

Generate Appointments.

Appointment Date: (mm/dd/yyyy) * `11/15/2018`

Appointment Start Time: *
Make sure your start time is LATER
than the previous start time (or the zero record). `9:00 AM ⌄`

Appointment End Time: * `11:30 AM  ⌄`

Increment Time: `15 Minutes ⌄`

How many appointments for each time block? `25`

Appointments for this Corps: LargeCorps

Application Type: * `Appointment  ⌄`

| **The Salvation Army** | Menu | | Generate New Appointments |

Generate Prereg Appointment Instructions
Prereg appointments (for 2018) use a different method of assiging appointment times that what is used for Client Appointments.

Select how many to assign for each time.
If you want to block out a time for Lunch, submit morning first, then afternoon.
When clients are filling out their Preregistration form, they will view the available appointments and select one of the times that has available time slots
If no time slots are defined, an error message will be shown. As each Pre-Registration appointment is completed, it will reduce by 1 the appointments available for that time slot.
You can edit the number available on a particular time by clicking on the time below.
If you add a block and an existing time is found, it will add to the current number.

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- [Nbr] Corps Name -- Appt Date - Time -- Apt Count.
- LargeCorps, Appointment, **11/2/2018**, 01:45 PM, -- **50**
- LargeCorps, Appointment, 11/2/2018, 02:00 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 02:15 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 02:30 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 02:45 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 03:00 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 03:15 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 03:30 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 03:45 PM, -- 50
- LargeCorps, Appointment, 11/2/2018, 04:00 PM, -- 50
- LargeCorps, Appointment, **11/15/2018**, 09:00 AM, -- **25**
- LargeCorps, Appointment, 11/15/2018, 09:15 AM, -- 25
- LargeCorps, Appointment, 11/15/2018, 09:30 AM, -- 25
- LargeCorps, Appointment, 11/15/2018, 09:45 AM, -- 25

The system also supports online adoption where the public can register and adopt angels.

You may have already explored the help & FAQ – but here is the link to a couple of introductory videos that you may find interesting:

https://www.pwhdev.net/AngelWebSQL/angelwebfaq.html#6-1

Below is some information you can use to introduce new users to AngelWeb.

The Help and FAQ pages may be interesting:
http://www.pwhdev.net/AngelWebSQL/angelwebfaq.html

Here is a video introducing AngelWeb:
http://www.pwhdev.net/AngelWebSQL/helpfiles/videointroductionangelweb.html