# PURPOSE

This instruction aid covers the search and selection of a client record

# AUDIENCE

Agency employees and volunteers who record client visits to a food pantry

# PREREQUISITES

(A) User Log In & PW Reset

# INSTRUCTION STEPS

|  |  |  |  |
| --- | --- | --- | --- |
|  | New TEFAP | New CSFP | New Pantry |
| 1. User Log In
 |  |  |  |
| 1. Search, identify and select client record
 |  |  |  |

## Revision History

Dec 1, 2022 Initial Release

|  |
| --- |
| 1. **Search, identify and select client record**
 |
| 1. If you have just logged in, click Open in the Case Management box
 | Graphical user interface, application  Description automatically generated |
| 1. Select Name as the Search criteria from “Search for Clients By...”
 |  |
| 1. Enter client Last Name followed by First Name
 |  |
| **HINT: Watch for client records to be presented in a list as you type the Last Name and First Name. The desired client record MAY appear before you finish typing** |  |
| 1. Select the desired client record from the list (highlighted in blue) and click on it
 |  |
| **HINT: There may be multiple client records with the same name. Use Date of Birth at the far right to confirm and select the desired client record** |  |
| **HINT: The client record may have a different first name or last name in the system than the first and last name provided by the client.** **Select Date of Birth as the Search criteria from “Search for Clients By...”** |  |
| 1. Select the desired client record from the list (highlighted in blue) and click on it
 |  |
| 1. Check if there is an Alert (at the top of the screen) and review the associated client note
 |  |