# PURPOSE

This instruction aid covers the selection and recording of a New TEFAP, New CSFP or New Pantry Visit to a client. Pantry Delivery is covered in another Instruction Aid

# AUDIENCE

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

# PREREQUISITES

1. User Log In & Password Reset
2. Search Client Record

# INSTRUCTION STEPS

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| --- | --- | --- | --- |
|  | New TEFAP | New CSFP | New Pantry |
| (B) Search Client Record |  |  |  |
| 1. Services: select Service to which the client is eligible | Select a service | | |
| 1. Pantry Distribution: select the reason(s) for the visit |  |  |  |
| 1. Pantry Distribution: select the client eSignature type |  |  |  |
| 1. Pantry Distribution: obtain the client or proxy eSignature |  |  |  |
| 1. Pantry Distribution: save the record |  |  |  |
| 1. Pantry Distribution: communicate Service eligibility |  |  |  |

## Revision History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release; update Dashboard / Case Management screen

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| 1. **Select Service to which the client is eligible** | |
| 1. Click on SERVICES tab at top of page |  |
| 1. Eligible Services appear as Blue boxes. Click in the desired service for this visit. |  |
| **HINT: A message will appear in the New TEFAP Visit button if the client has received services from your pantry in the month** | cid:image001.png@01D4D9A8.25871590 |
| **RULE: Select New TEFAP Pantry for clients who receive both TEFAP and Pantry food.** | |

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| 1. **Select the reason(s) for the visit** | |
| 1. Check the reason or reasons for today’s visit. If client has not stated a reason, check “Ongoing Need” |  |
| ***If NEW PANTRY DISTRIBUTION, skip to Step 6.*** | |

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| 1. **Select the client eSignature type** | |
| 1. Scroll down to Client eSignature section and select Signature Type from the pulldown list |  |

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| 1. **Obtain the client or proxy eSignature** | |
| ***Sign On Screen option*** | |
| 1. Click on Open Signature Canvas |  |
| 1. You will see “Press Esc to exist full screen for 5 seconds”. |  |
| **Hint: DO NOT press the Esc key when you see the message, or you will need to repeat Step 8** |  |
| 1. Request the client sign on the screen using a fingertip or stylus |  |
| 1. When the client has completed their signature, press Esc key on keyboard |  |
| ***ScripTel Signature Pad option*** | |
| 1. If ScripTel Signature Pad is selected, small signature window will appear |  |
| 1. Request client use the stylus to sign the Signature Pad.  You will see the signature in the signature window as the client signs |  |
| **HINT: Request client to click OK on the Signature Pad when done signing to clear the Signature Pad screen** |  |
| ***Hard Copy Signature option*** | |
| 1. Check the “Client has Signed Hard Copy” |  |
| **RULE: A hard copy client signature for the certification must have been obtained and placed on file before selecting this option.** | |

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| 1. **Save the record** | |
| ***All Signature Type options*** | |
| 1. Scroll to the bottom of page and click Save |  |

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| 1. **Communicate Service eligibility** | |
| 1. Use Household Summary information to inform client about Service eligibility |  |
| **HINT: Household size determines number of TEFAP food units.** |  |
| **RULE: Record two services for TEFAP clients who also receive CSFP and CSFP clients who also receive Pantry food** | |
| **HINT: A message will appear in the New TEFAP Visit button noting that the client has received services in the month** | cid:image001.png@01D4D9A8.25871590 |
| 1. For clients who are eligible to receive a second Service, Repeat Steps 2-6 |  |