# PURPOSE

This instruction aid covers the selection and recording of a New TEFAP, New CSFP or New Pantry Service that is delivered to an Agency client.

# AUDIENCE

Agency employees and volunteers who schedule and record deliveries to clients

# PREREQUISITES

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

(D) Record Services Visit

# INSTRUCTION STEPS

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|  | New TEFAP | New CSFP | New Pantry |
| ***PANTRIES WITH LARGE NUMBER OF WEEKLY DELIVERIES*** | | | |
| 1. Create Attendance List and add clients |  |  |  |
| 1. Retrieve Attendance List |  |  |  |
| 1. Attendance: search, identify and select client record |  |  |  |
| ***PANTRIES WITH SMALL NUMBER OF WEEKLY DELIVERIES*** | | | |
| 1. Search Client Record |  |  |  |
| ***ALL PANTRIES*** | | | |
| 1. Services: select Service to which the client is eligible | Select a service | | |
| 1. Pantry Distribution: update date and Delivery Required |  |  |  |
| 1. Pantry Distribution: select the reason(s) for the visit |  |  |  |
| 1. Pantry Distribution: select the client eSignature type |  |  |  |
| 1. Pantry Distribution: record the proxy’s signature |  |  |  |
| 1. Pantry Distribution: save the record |  |  |  |

## Release History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release

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| 1. **Create Attendance List and add clients** | |
| 1. Select Clients from the side menu |  |
| **HINT: The side menu will remain visible as you navigate through Link2Feed** |  |
| 1. Select Attendance from Clients sub-menu |  |
| **HINT: If Attendance does not appear in your side menu, contact BRAFB to request it be added to your user role.** |  |
| 1. Click on New Attendance Group |  |
| 1. Enter a name for the Attendance Group |  |
| **HINT: Use a name that describes the delivery date and route or location. Example: 3rd Sat Blue Route** |  |
| 1. Search for each client that you wish to add to the delivery list and select the client record |  |
| 1. The client record will be added to the delivery list |  |
| 1. Repeat steps e. and f. until all clients have been added. Then, click on Create Group |  |
| 1. Delivery List will appear in the Attendance Client Group List |  |

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| 1. **Retrieve Attendance List** | |
| 1. Select Clients from the side menu |  |
| 1. Select Attendance from Clients sub-menu |  |
| 1. Delivery Lists will appear in the Attendance Client Group List. |  |
| 1. Find the desired list and click on the orange Edit icon |  |

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| 1. **Search, identify and select client record** | |
| 1. Scan for the client for whom you wish to record a delivery. Click on their name |  |
| **HINT: Client records can be added to or deleted from Attendance Group from “Record Attendance” 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. |  |
| **RULE: Select New TEFAP Pantry for clients who receive both TEFAP and Pantry food** | |

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| 1. **Update date and Delivery Required** | |
| 1. Update the date (if the delivery was prior to today) and change Delivery Required to “Yes” |  |

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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 10.*** | |
| 1. **Select the client eSignature type** | |
| 1. Scroll down to Client eSignature section and select Signature Type from the pulldown list |  |
| **RULE: Written authorization for an alternate is required from the client to sign for TEFAP or CSFP delivery** | |

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| 1. **Record the proxy’s eSignature** | |
| ***Sign On Screen option*** | |
| 1. Click on Open Signature Canvas |  |
| 1. You will see “Press Esc to exit 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. Sign on the screen using a fingertip or a stylus |  |
| 1. Press Esc key on keyboard |  |
| ***ScripTel Signature Pad option*** | |
| 1. If ScripTel Signature Pad is selected, small signature window will appear |  |
| 1. Use the stylus to sign the Signature Pad.  You will see the signature in the signature window as the proxy 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 |  |
| 1. For clients who are eligible to receive a second Service, Repeat Steps 5-10 |  |
| **RULE: Record two services for TEFAP clients who also receive CSFP and for CSFP clients who also receive Pantry food** | |