# PURPOSE

This instruction aid covers adding a new client record, either from a paper form or in person, for an agency that offers USDA TEFAP.

# AUDIENCE

Agency employees and volunteers who perform client intake for a food pantry or who enter client data as part of Link2Feed implementation

# PREREQUISITES

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

# INSTRUCTION STEPS

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| (B) Search Client Record |
| 1. Add new record |
| 1. Perform TEFAP Screening |
| 1. Enter Client Personal information |
| 1. Update Household Members |
| 1. Enter Monthly Income information |

## Release History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release

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| 1. **Add new record** | |
| 1. Click New TEFAP |  |
| **RULE: New TEFAP is required for in-person clients by Virginia Department of Agriculture and Consumer Services (VDACS) to establish TEFAP eligibility before collecting remaining info** | |

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| 1. **Perform TEFAP Screening** | |
| 1. Enter client Last Name and First Name. Confirm spelling with client. |  |
| **HINT: Names should have first letter capitalized and all other letters in lower case** |  |
| **HINT: Suffix (Jr, III) should be at end of Last Name with no punctuation** |  |
| **HINT: Last Names may be two names and may or may not be hyphenated.** |  |
| 1. Begin typing client Address in Address line 1 |  |
| 1. A list of address choices will appear. Continue typing until the correct address appears in the list. Confirm address with client |  |
| 1. Select the correct address. The software will auto-fill the county, city, state and zip code fields |  |
| 1. Enter apartment or unit in “Address Line 2”, if applicable |  |
| **HINT: If the client does not have an address or declines to disclose their address, click “No fixed address / Undisclosed”** |  |
| 1. Enter total number of people in the Household including the primary client 2. Enter the estimated monthly income for all members of the Household |  |
| 1. Click the Social Programs that apply for the Household |  |
| 1. Read disclaimer to client before asking them to sign |  |
| 1. Scroll down to Client eSignature section and select Signature Type from the pulldown list |  |
| ***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 g.** |  |
| 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 |  |

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| ***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.** | |
| ***All Signature Type options*** | |
| 1. Scroll to the bottom of page and click Confirm Eligibility |  |
| 1. TEFAP eligibility message “TEFAP Eligible” or TEFAP Ineligible” will appear.   Inform client of eligibility by reading the message text |  |
| 1. Click Continue Intake |  |

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| 1. **Enter Client Personal information** | |
| 1. Personal Information screen will display a reminder that client profile must be created within 72 hours |  |
| **HINT: Required fields are marked with an asterisk (\*). They must be completed before pressing “Save & Next” or an error message will appear at the top of the screen** |  |
| 1. Select one value for “First Food Bank Visit” from list of choices |  |
| **HINT: Select “Unknown” for existing client whose data is being entered from paper records** |  |
| 1. Client Last Name and First Name that were entered in TEFAP screening will be visible |  |
| 1. Enter Date of Birth using format MM-DD-YYYY |  |
| **HINT: If Date of Birth is not known, estimate YYYY from person’s age, enter 01-01-YYYY and check “Is Date of Birth Estimated?”** |  |
| 1. Select one value from list of choices |  |
| 1. Scroll down to Marital Status. Select one value from list of choices |  |
| 1. Scroll down to Housing Type. Select one value from list of choices |  |
| 1. Scroll down to ID Type. Click “ADD” if an ID is required to obtain Services |  |
| **RULE: An ID is only required for clients over the age of 60 who wish to receive CSFP** | |
| 1. Select one value from list of choices |  |
| 1. Verify ID and enter your initials in the Confirmation field |  |
| **RULE: ID numbers shall not be recorded in the Confirmation field** | |
| 1. Scroll down to Languages. Click on the appropriate values from the list of choices |  |
| 1. Scroll down to “Referred By”. Select one value from list of choices | Text  Description automatically generated |
| 1. Scroll down to “Ethnicity”. Click on the appropriate values for from the list of choices | Text  Description automatically generated |
| **HINT: Clients may self-identify as more than one Ethnicity type** | Text  Description automatically generated |
| 1. Scroll down to “Self-Identifies As”. Click on the appropriate values from the list of choices |  |
| **If there are Household Members, proceed to Step 5.**  **Otherwise, Jump to Step 6.** | |
| 1. Scroll to the bottom of the screen and click “Save & Next” |  |

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| 1. **Update Household Members** | |
| 1. Scroll down to Household Members. “Anonymous Client” records will have been created from Household Size entered in TEFAP Screening |  |
| 1. Click on the Edit icon (pencil) for an “Anonymous Client” record |  |
| 1. Enter Last Name and First Name in Household Member info |  |
| 1. Enter Date of Birth using format mm/DD/YYYY or MM-DD-YYYY |  |
| **HINT: If Date of Birth is not known, estimate YYYY from person’s age, enter 01-01-YYYY and check “Is Date of Birth Estimated”** |  |
| 1. Select one Gender value from list of choices |  |
| 1. Select one Relationship value from list of values |  |
| 1. Scroll down to “Ethnicity”. Click on the appropriate values for from the list of choices | Text  Description automatically generated |
| 1. Scroll down to “Self-Identifies As”. Click on the appropriate values from the list of choices |  |
| 1. Scroll to the bottom of the screen and click “Changes” |  |
| 1. Repeat Steps a. through g. for each “Anonymous Client” record |  |
| **HINT: Anonymous Client records must be completed or deleted before pressing “Save & Next” or an error message will appear at the top of the screen** |  |
| 1. Click “Save & Next” |  |

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| 1. **Enter Monthly Income information** | |
| 1. The screen will change to MONTHLY INCOME tab. | Graphical user interface, text, application, chat or text message  Description automatically generated |
| 1. Monthly Income and Expenses screen will display a reminder that client profile must be created within 72 hours | Graphical user interface, application  Description automatically generated |
| 1. Scroll down to “Household Social Programs”. Values selected during TEFAP qualification will be populated | Graphical user interface, text, application, email  Description automatically generated |
| 1. Scroll down to “Monthly Income”. Re-enter the total monthly income from TEFAP qualification | Graphical user interface, text, application, email  Description automatically generated |
| **NOTE: Monthly Income is NOT populated from TEFAP qualification screen** | |
| **HINT: Monthly Household Expenses is an option available to agencies that do case management with their clients.** | Graphical user interface, text, application  Description automatically generated |
| 1. Review the income and programs for each member of the household and update as needed | Graphical user interface, text, application, email  Description automatically generated |
| 1. Click “Save Changes” |  |
| **New TEFAP Entry is Complete** | |