# PURPOSE

This instruction aid covers CSFP Certification after adding a New CSFP client or during a Service Visit for an existing client.

# AUDIENCE

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

# PREREQUISITES

(A) Log In & Password Reset

(G) New Client Entry-New TEFAP

OR

(H) New Client Entry-New Pantry

# INSTRUCTION STEPS

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|  |
| (B) Search Client Record |
| 1. CSFP: Complete CSFP Certification |
| 1. CSFP: select the client eSignature type |
| 1. CSFP: obtain the client eSignature |
| 1. CSFP: save the record |
| 1. CSFP: Review Certification Log |

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| 1. **Complete CSFP Certification** | |
| 1. Click on CSFP tab at top of page |  |
| 1. CSFP Client Info screen will appear |  |
| 1. Enter the Client ID in the CSFP ID field |  |
| **HINT: Client ID appears in the blue box to the right of the Client Last Name, First Name** |  |
| 1. The Location will default to the Agency you selected at login. |  |
| 1. Select Status “Active” or “Waiting List” from the list of choices |  |
| **HINT: Select “Active” if your agency has CSFP Senior boxes available.**  **Select “Waiting List” if your agency has reached their prescribed CSFP Senior box caseload.** |  |
| 1. Enter Enrollment Date |  |
| **HINT: Enrollment Date is a required field and usually the date you are entering CSFP Certification** |  |
| 1. Scroll down to Proxy Signatories |  |
| **HINT: A proxy is someone authorized by the client to obtain Services and provide an eSignature on the client’s behalf** |  |
| **If client does not name a Proxy, Skip to step j.** | |
| 1. If client wants to authorize a proxy, click “Add a Proxy Signature”. |  |
| 1. Enter the Full Name and Phone Number of the Proxy. |  |
| 1. Click either “Certify” or “Recertify” (only one button will be present) |  |
| 1. Read disclaimer to client before asking them to sign |  |

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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 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 3** |  | |
| 1. Request the client sign on the screen using their fingertip |  | |
| 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.** | | |
| ***All Signature Type options*** | | |
| 1. Scroll to the bottom of page and click Save | |  |

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| 1. **Review Certification/Recertification Log** | |
| 1. The Certification or Recertification and the date will appear on the log |  |
| **CSFP Certification complete**  **Proceed with (D) Services Visit or Topic: (E) Services Delivery** | |