# PURPOSE

This instruction aid covers changes to CSFP Status 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

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

(G) New Client Entry-New TEFAP OR (H) New Client Entry-New Client

(I) CSFP Client Certification

# INSTRUCTION STEPS

|  |
| --- |
|  |
| (B) Search client record |
| 1. CSFP: Review CSFP Status
 |
| 1. CSFP: Modify CSFP Status
 |
| 1. CSFP: select the client eSignature type
 |
| 1. CSFP: obtain the client eSignature
 |
| 1. CSFP: save the record
 |
| 1. CSFP: Review Certification Log
 |

|  |
| --- |
| 1. **Review CSFP Status**
 |
| 1. Click on SERVICES tab at top of page
 |  |
| **HINT: Determine client’s CSFP eligibility from New CSFP Visit button color. Blue is Eligible; Gray is Ineligible** |  |
| 1. If Status is “Active” and Service button (on SERVICES tab) is Gray: Perform Client Review and update Monthly Income
 |  |
| 1. If Status is “Inactive”, proceed to Step 3 and change Status to “Closed”
 |  |
| 1. If Status is “Waiting List” Service button (on SERVICES tab) is Gray:Perform Client Review and update Monthly Income
 |  |
| 1. If Status is “Suspended”: Perform Client Review
 |  |
| 1. If Status is “Closed” and client wants CSFP: Perform Client Review and update Monthly Income
 |  |

|  |
| --- |
| 1. **Modify CSFP Status**
 |
| 1. Click on CSFP tab at top of page
 |  |
| 1. CSFP Client Info screen will appear
 |  |
| 1. Select Status from the list of choices
 |  |
| **Hint: If Status was “Suspended”, select “Active,” “Waiting List,” or “Closed”** |  |
| **Hint: If Status was “Closed”, select “Active” or “Waiting List”** |  |
| **HINT: Status should be “Active”, “Waiting List”, “Suspended” or “Closed”. No other Status should be used.** |  |
| 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
 |  |

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

|  |
| --- |
| 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
 |  |

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