# 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

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| (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 |

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| 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 |  |

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| 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 |  |

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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 Topic: (D) Services Visit or Topic: (E) Services Delivery** | |