# PURPOSE

This instruction aid covers exception handling during selection of a client.

The exceptions that may need to be handled are:

* Switch to Primary Client (of the Household)
* Profile Review Required
* Merge Review
* Split from Household

# AUDIENCE

Agency employees and volunteers who record client visits to a food pantry and who maintain or update client information

# PREREQUISITES

1. User Log In & Password Reset
2. Search Client Record
3. New Client Entry-New TEFAP
4. New Client Entry-New Client

# INSTRUCTION STEPS

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|  |
| (B) Search Client Record |
| 1. Identify the client data exception
 |
| 1. Resolve the client data exception
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## Release History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release

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| 1. **Identify the client exception**
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| **HINT: There are two types of client exceptions: “not the primary client in the household” and “profile review required”** |  |
| **Not the primary client in household** |
| 1. A message “Click here….” will appear for a client record that is not the primary client of the household
 |  |
| **HINT: Services can be delivered for a client who is not the primary client in the household if Services tab is Green (active)** |  |
| **RULE: Services should only be recorded for the primary client of the household with one exception: a household member eligible for CSFP** |
| 1. Click on “Click here….” to switch to the primary client of the household.

Complete Service Delivery per (1) Service Delivery, Steps 2-7 |  |
| **Profile Review Required** |
| 1. Client records with data exceptions will only have PERSONAL tab active; all other tabs will be shaded (not active)
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| 1. The client data exception will appear on the PERSONAL tab below “Personal Information”
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| **HINT: There are several types of and reasons for client data exceptions, but the steps for resolving them are the same** |  |

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| 1. **Resolve the client data exception**
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| 1. Click on the PERSONAL tab to view the client’s name, address and other personal information
 |  |
| 1. Review required fields to determine if any are not completed and update missing fields
 |  |
| **HINT: The required fields that most often require updating are** **\*Street, City, County, State & Zip****\*Referred By****\*Housing Type****\*Household Members Date of Birth** |  |
| 1. Scroll to the bottom of the screen and click “Save & Next”
 |  |
| 1. The screen will change to MONTHLY INCOME tab.
 |  |
| 1. Review the income and programs for each member of the household and update as needed
 |  |
| 1. Scroll to the bottom of the screen and click “Save & Next”
 |  |
| 1. Scroll to the bottom of the screen and click “Save Changes”
 |  |
| **Profile Review is complete for the client** |