# PURPOSE

This instruction aid covers exception handling during selection and recording of a New TEFAP or New CSFP Visit to a client.

The exceptions that may need to be handled are:

* TEFAP requires certification or recertification
* CSFP requires certification or recertification
* Client has already received TEFAP today
* Client has already received CSFP this month

# AUDIENCE

Agency employees and volunteers who record client visits to a food pantry

# PREREQUISITES

1. Log In & Password Reset
2. Search Client Record
3. Record Services Visit

(K) Modify Client CSFP Status

# INSTRUCTION STEPS

|  |  |  |  |
| --- | --- | --- | --- |
|  | New TEFAP | New CSFP | New Pantry |
| 1. Search Client Record |  |  |  |
| 1. Services: Identify an eligibility exception |  |  |  |
| 1. TEFAP or CSFP: Resolve eligibility exception |  |  |  |
| 1. TEFAP or CSFP: select the client eSignature type |  |  |  |
| 1. TEFAP or CSFP: obtain the client eSignature |  |  |  |
| 1. TEFAP or CSFP: save the record |  |  |  |
| 1. Services: Identify a duplicate visit exception |  |  |  |

## Release History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release

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| 1. **Identify an eligibility exception** | |
| 1. “Recertification Required” will appear in a banner at the top of the screen if the client is eligible for service but their certification has expired | A picture containing logo  Description automatically generated |

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| 1. **Resolve the eligibility exception** | |
| ***TEFAP*** | |
| 1. Click on TEFAP tab at top of page |  |
| 1. TEFAP Client Info screen will appear | Graphical user interface, text, application, email  Description automatically generated |
| 1. Click “Recertify” |  |
| 1. Proceed to Step 5 |  |
| ***CSFP*** | |
| **Proceed to (K) Modify Client CSFP Status, Step 2** | |

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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 | Graphical user interface, text, application, email  Description automatically generated |

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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 exist full screen for 5 seconds”. |  |
| **Hint: DO NOT press the Esc key when you see the message, or you will need to repeat Step 8** |  |
| 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 the client use the stylus to sign the Signature Pad.  You will see the signature in then 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.** | |

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| 1. **Save the record** | |
| ***All Signature Type options*** | |
| 1. Scroll to the bottom of page and click Save |  |

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| 1. **Identify a duplicate visit exception** | |
| 1. Click on SERVICES tab at top of page | A picture containing logo  Description automatically generated |
| **HINT: Last visit to your pantry will appear on the right side of the screen** | Text  Description automatically generated |
| **HINT: Scroll down to view list of past visits to your pantry. This will help avoid a Duplicate Visit Exception** | Graphical user interface  Description automatically generated |
| ***TEFAP*** | |
| 1. TEFAP Services button will not show that a visit has been recorded in the month | Graphical user interface, website  Description automatically generated |
| 1. If you select the TEFAP Service and a TEFAP has already been provided on the same day, an error message will appear in the upper right corner of the screen | Graphical user interface, text, application  Description automatically generated |
| 1. And a message will appear at the bottom of the Household Summary   Inform the client that a visit has already been recorded for the Service today. | Graphical user interface, table  Description automatically generated |
| 1. Click “Back to Services” to select another eligible Service |  |

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| ***CSFP*** | |
| 1. CSFP Services button will show that a visit has been recorded in the month |  |
| 1. If you select the CSFP Service, an error message will appear in the upper right corner of the screen | Text  Description automatically generated |
| 1. And a message will appear at the bottom of the Household Summary   Inform the client that a visit has already been recorded for the Service today. | Table  Description automatically generated with low confidence |
| 1. Click “Back to Services” to select another eligible Service |  |
| ***Pantry*** | |
| 1. New Pantry Services button will not show that a visit has been recorded in the month | Graphical user interface, website  Description automatically generated |
| 1. If you select the TEFAP Service and a TEFAP has already been provided on the same day, an error message will appear in the upper right corner of the screen | Graphical user interface, text, application  Description automatically generated |
| 1. And a message will appear at the bottom of the Household Summary.  Inform the client that a visit has already been recorded for the Service today. | Graphical user interface, table  Description automatically generated |
| 1. Click “Back to Services” to select another eligible Service |  |