# PURPOSE

This instruction aid covers adding a new client record, either from a paper form or in person, for an agency that does not offer TEFAP.

# 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. User Log In & Password Reset
2. Search Client Record

# INSTRUCTION STEPS

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| (B) Search Client Record |
| 1. Add new record |
| 1. Enter Client Personal information |
| 1. Add Household Members |
| 1. Enter Monthly Income information |

## Release History

Nov 19, 2018 Initial Release

Dec 1, 2022 Re-release

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| 1. **Add new record** | |
| 1. Click New Client |  |

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| 1. **Enter Client Personal information** | |
| 1. Personal Information screen will display a reminder that client profile must be created within 72 hours |  |
| **HINT: Required fields are marked with an asterisk (\*). They must be completed before pressing “Save & Next” or an error message will appear at the top of the screen** |  |
| 1. Select one value for “First Food Bank Visit” from list of choices |  |
| **HINT: Select “Unknown” for existing client whose data is being entered from paper records** |  |
| 1. Enter client Last Name and First Name |  |
| **HINT: Names should have first letter capitalized and all other letters in lower case** |  |
| **HINT: Suffix (Jr, III) should be at end of Last Name with no punctuation** |  |
| **HINT: Last Names may be two names and may or may not be hyphenated.** |  |
| 1. Enter Date of Birth using format MM/DD/YYYY or MM-DD-YYYY |  |
| **HINT: If Date of Birth is not known, estimate YYYY from person’s age, enter 01-01-YYYY and check “Is Date of Birth Estimated?”** |  |
| 1. Select one value from list of choices |  |
| 1. Scroll down to Marital Status. Select one value from list of choices |  |
| 1. Scroll down to Address line 1. Begin typing client Address in Address line 1 |  |
| 1. A list of address choices will appear. Continue typing until the correct address appears in the list |  |
| 1. Select the correct address. The software will auto-fill the county, city, state and zip code fields |  |
| 1. Enter apartment or unit in “Address Line 2”, if applicable |  |
| **HINT: If the client does not have an address OR declines to disclose their address, click “No fixed address / Undisclosed”** |  |
| 1. Scroll down to Housing Type. Select one value from list of choices |  |
| 1. Scroll down to ID Type. Click “ADD” if an ID is required to obtain Services |  |
| **RULE: An ID is only required for clients over the age of 60 who wish to receive CSFP** | |
| 1. Select one value from list of choices |  |
| 1. Verify ID and enter your initials in the Confirmation field |  |
| **RULE: ID numbers shall not be recorded in the Confirmation field** | |
| 1. Scroll down to Languages. Click on the appropriate values from the list of choices |  |
| 1. Scroll down to “Referred By”. Select one value from list of choices |  |
| 1. Scroll down to “Ethnicity”. Click on the appropriate values for from the list of choices |  |
| **HINT: Clients may self-identify as more than one Ethnicity type** |  |
| 1. Scroll down to “Self-Identifies As”. Click on the appropriate values from the list of choices |  |
| **If there are no Household Members, Jump to Step 5** | |
| 1. Scroll to the bottom of the screen and click “Save & Next” |  |
| 1. **Add Household Members** | |
| 1. Scroll down to Household Members |  |
| 1. Click Add |  |
| 1. Enter Last Name and First Name in Household Member info |  |
| 1. Enter Date of Birth using format MM/DD/YYYY or MM-DD-YYYY |  |
| **HINT: If Date of Birth is not known, estimate YYYY from person’s age, enter 01-01-YYYY and check “Is Date of Birth Estimated”** |  |
| 1. Select one Gender value from list of choices |  |
| 1. Select one Relationship value from list of choices |  |
| 1. Scroll down to “Ethnicity”. Click on the appropriate values from the list of choices |  |
| 1. Scroll down to “Self-Identifies As”. Click on the appropriate values from the list of choices |  |
| 1. Scroll to the bottom of the screen and click “Changes” |  |
| 1. Repeat Steps b. through g. for each Household Member |  |
| 1. Scroll to the bottom of the screen and click “Save & Next” |  |

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| 1. **Enter Monthly Income information** | |
| 1. The screen will change to MONTHLY INCOME tab. |  |
| 1. Monthly Income and Expenses screen will display a reminder that client profile must be created within 72 hours |  |
| 1. Scroll down to “Household Social Programs”. Click on the appropriate values from the list of choices for the Household | Graphical user interface, text, application, email  Description automatically generated |
| **NOTE: Client is eligible for TEFAP if SNAP = Yes OR Medicaid, SSI or TANF are checked** | |
| 1. Scroll down to “Monthly Income”. Enter the total monthly income for the Household |  |
| **NOTE: Monthly Income should be entered IF SNAP = No AND No Household Social Programs are checked** | |
| **HINT: Monthly Household Expenses is an option available to agencies that do case management with their clients.** |  |
| 1. Review the income and programs for each member of the household and update as needed |  |
| 1. Click “Save Changes” |  |
| **New Client Entry is Complete** | |