



# Link2Feed Intake User Guide

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Your guide to using Link2Feed for client intake,  
TEFAP compliance, and reporting at your  
pantry

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## Link2Feed Live Site Basics

### Login

1. Go to [portal.link2feed.com](http://portal.link2feed.com)
2. You will see a login page displayed.



#### Login to the Portal

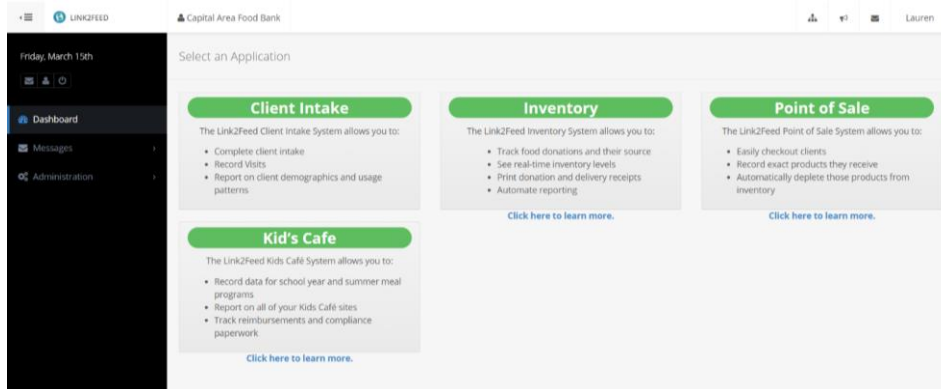
[I FORGOT MY PASSWORD](#)

[LOGIN](#)

3. Enter your email address and password. If you are logging in for the first time, use the password provided to you by your Link2Feed Administrator. the portal will require you to change your password and accept the user agreement.
4. Click on the “Login” button.
5. Use the drop-down menu to select your organization to log into and hit “Continue.” If your organization has multiple locations, select the location you are recording visits for.

## Application Dashboard

Immediately after logging in, you will see the following page. To access the intake portal and to run reports, click “Client Intake.” The Inventory, Point of Sale, and Kid’s Café portals are not available to CAFB partners at this time.



## Link2Feed Menu

This is the menu on the left-hand side of the screen.

Underneath today's date there are (3) icons



The envelope icon will take you to Messages



The person icon will take you to your profile



The power icon will log you out of the system

Beneath these three (3) icons are:

**Dashboard** – this will take you back to the Dashboard/home screen.

**Clients** – Under clients there are three (3) sections:

- 1) Client Search – Search for clients and create new client profiles
- 2) Client Notes Review – Review all notes created for clients, starting with the most recent note created
- 3) Client Duplicates – Review potential duplicates

**Reports** – Under reports there are three (3) sections.

- 1) New Report – Create a new report
- 2) Report Inbox – See all reports you've previously requested.
- 3) Recurring Reports – See all recurring reports you've requested

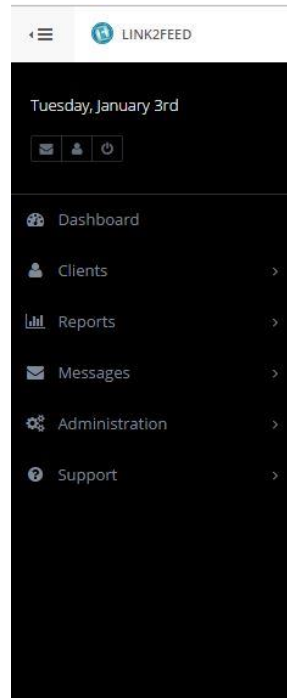
**Messages** – Under messages there are two (2) sections.

- 1) Messages – View any reports in your inbox
- 2) Groups – View and edit any groups you've created

**Administration** – Only CAFB administrators will be able to view this

**Support** – Under support there are two (2) sections.

- 1) User Manual – Searchable page for on-the-spot support
- 2) Support Videos – YouTube videos on basic functions and reports



## Dashboard

On the Link2Feed Dashboard there are three (3) sections:

- 1) Unread Announcements – This section of the Dashboard is where System Wide Announcements are first seen. These announcements can be updates to the system and notices of when the system will be down for maintenance.
- 2) Search for Clients By... - This section of the Dashboard is where you can search for clients by Client ID, Date of Birth, Name, Address, Phone, or Barcode.  
If a client is not found by searching, you can click the “New Client” button to add them to the system.
- 3) Most Recently Accessed Client Records – This section of the Dashboard is where you can see a history of all the client records you have recently accessed. You can click on a client in the Recently Accessed Client List to be taken directly to their Client Profile. You can sort your recently accessed clients by clicking on the headers of each column (Client ID #, Last/Nickname, First Name, Last Accessed). The only way to clear your Most Recently Accessed Client Records list is by clicking on the red “Clear History” Button.

Dashboard

Unread Announcements

You have no unread Announcements.

All Announcements

Search for Clients By...

Client ID Date of Birth Name Address Phone

New Client

Most Recently Accessed Client Records

Clear History

These are your most recently opened client records, not a comprehensive list of clients.

Per page: 10 Search in History

Client ID #	Last / Nickname	First Name	Last Accessed	
11992	Prater	Holly	08 Dec 2016 @ 11:27	
11855	Doe	Jane	16 Nov 2016 @ 14:47	

Showing 1 to 2 of 2 entries

Previous 1 Next

## User Profile

You can access your User Profile by clicking the Person Icon on the menu bar, or by clicking on your name in the top right-hand corner of the screen.

Under your profile you can:

- Edit Your Password
- Update your name and email address
- Set the Preferred Client Tab you start on when accessing a client's record (Personal Information, Profile Information, Monthly Income, Services or Notes).
- Set the Preferred Quick Search you use to search for a client in the database (Client ID, Date of Birth, Name, Address or Phone).

My Profile

Holly Prater

Edit Password

You can now edit your password in your Accounts Profile

Edit Details

You can now edit your name, gender, and time zone in your Accounts Profile

\* Preferred client tab

Personal Information

\* Preferred quick search

Client Name Search

\* Preferred site theme

Default

Cancel

Save



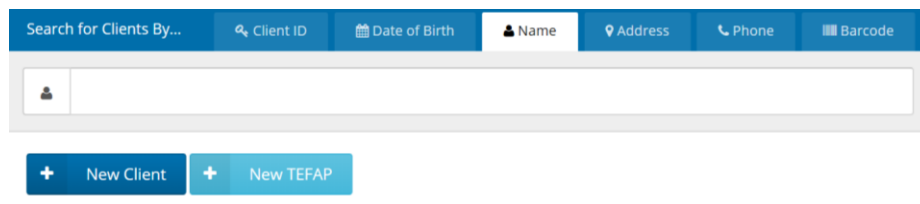
## Client Intake

### Tips and Tricks

1. All required questions in Link2Feed have an asterisk (\*) next to them. **These questions are required because collecting in-depth information about the communities we serve allows us to make better decisions about the food and services we provide.** However, we also recognize that not everyone will want to answer every question. [First Name](#), [Last Name](#), and [Date of Birth](#) are required to prevent duplicates in Link2Feed. Starting with [Gender](#), every required question has an [Undisclosed](#) option for clients who do not want to share that information.
2. Several required questions also have [Other](#) or [None](#) as an option.
  - a. [Other](#): Clients should answer [Other](#) if they identify with an option not included on the list. **If you notice that an option is missing from these lists, email [link2feed@capitalareafoodbank.org](mailto:link2feed@capitalareafoodbank.org) to let our team know what is missing.**
  - b. [None](#): Clients should answer None if they do not identify with any options, whether on the list or not
3. Link2Feed utilizes boxes ☐ for multiple-choice questions and circles ☐ for single-choice questions. Wherever you see a box, you may select as many answers as apply. Wherever you see a circle, you may only select one answer.

### Creating a New Client

Always search for a client before clicking “Add New Client” button.



When searching for a client, as you type in a client’s name (you can also search by Client ID, Date of Birth, Address, Phone Number, or Barcode) a drop-down menu will appear.

The drop-down menu will show you a list of clients with their name and birthdate. Because Link2Feed is networked, some of your clients may be in the system already if they received services at another CAFB partner pantry.

**It is important to remember here that by entering clients into Link2Feed, you are not registering them for your pantry. You are adding them to an online system so they can receive services from any food assistance organization in our network. This is a benefit to everyone- You get a better understanding of your impact in the community and your clients get better access to the services they need!**

If you see the client that you are looking for in the drop-down menu, click on their name and you will be taken to the corresponding client profile. You can then compare the information you have on their intake form to the information that is already in Link2Feed. If there is any contradicting information, make a note on the [Notes](#) tab which information needs to be updated or clarified at that client's next visit.

If the client's name does not appear you need to click on the "New Client" button, located underneath the search field, to create a new profile.

### Client Profile Basics

There are six (6) sections to a client's profile.

1. Personal
2. Profile
3. Monthly Income
4. Services
5. Notes
6. Activity

All the sections in a client profile that have a blue asterisk (\*) next to them are required. If you leave a field blank that has an \* by it, you will not be able to move to the next section of the client's profile.

If you are creating a new client and don't complete all the fields (up to the "Services" page) within 72 hours of the profile's creation, the client's profile will be removed from the system. A notification appears each time a user is adding a new client to remind them of this.

 New client records will be removed in 72 hours if not completed. Complete this record by finishing all steps up to "Services".

## Personal Tab

When adding a new client you will start on the Personal tab.

1 PERSONAL	2 PROFILE	3 MONTHLY INCOME	4 SERVICES	5 NOTES
------------	-----------	------------------	------------	---------

### First Food Bank Visit

The first field is **First Food Bank Visit**. This represents when their profile was created in Link2Feed, so select **Today**. **If you are editing an existing client profile, DO NOT edit the First Food Bank Visit.**

### Personal Information

The next part of the client's Personal Page is where you will enter their:

- \*Last Name
- \*First Name
- \*Date of Birth (MM-DD-YYYY)
- \*Gender
- \*Marital Status

### Entering an Address

Next you will input the client's address. If the client does not provide you with an address there is a check box that says **No Fixed Address/Undisclosed**. Checking this option will gray out the address field. Clients may also select this option if they are homeless or do not want to share their address.

- \*Street
- \*County
- \*City
- \*State
- \*Zip Code
- \*Housing Type (select one option from the list)

\* Street  
3200 Mount Vernon Hwy

\* County

\* City  
Mount Vernon

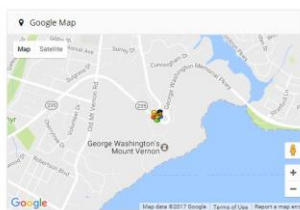
\* State  
Virginia

\* Zip Code  
22309

☐ No Fixed Address / Undisclosed

\* Housing Type

<input type="radio"/> Military Housing	<input checked="" type="radio"/> Own Home	<input type="radio"/> Youth Home / Shelter
<input type="radio"/> Emergency Shelter / Mission / Transitional	<input type="radio"/> Private Rental	<input type="radio"/> Undisclosed
<input type="radio"/> Evacuee	<input type="radio"/> Public (Social) Housing	<input type="radio"/> Other
<input type="radio"/> Unhoused	<input type="radio"/> With Family / Friends	



When typing in the **Street**, a list of suggested addresses will appear. This field uses data from Google Maps to auto-complete the address, ensuring standardization across our network. **Rather than typing the whole address, select the client's address from the drop-down menu.** If the address you're looking for does not appear in the drop-down menu, please double-check

your spelling. If you are certain that the address you're looking for is not in Google Maps, please manually type each address field into the corresponding box.

The map next to the address field will adjust after you've entered the address to show the physical location of the address. This is a good way to double-check that you've entered all the fields correctly.

#### Contact Information

Next you will see fields for:

Email Addresses

Phone Numbers

ID Type

By clicking the "Add" button under any of these fields you can enter as many as the client would like to provide. Please note that these fields are not required.

#### Entering a Barcode

To use Link2Feed's barcoding feature, follow the below steps to enter a client's barcode number.

1. Click "Add" under **ID Type**.
2. Use the drop-down menu to select "Barcode" under **ID Type**. Click inside the **Confirmation** box and use your barcode scanner to scan the sticker on the client's intake form. You can also type the barcode number into the **Confirmation** field but be careful to enter the number correctly. Please note that the **ID Type** field is not required, but if you choose to add an **ID Type** you **must** add a barcode number in the **Confirmation** box. If you click **Add** by accident, you may click the trash can icon to exit that field.

The screenshot shows a web form with three sections: 'Email Addresses', 'Phone Numbers', and 'ID Type'. Each section has a '+ Add' button. The 'ID Type' section is expanded, showing a dropdown menu with 'Barcode' selected. To the right of the dropdown is a 'Confirmation' field with the text '00000' and a trash can icon. Below the dropdown is another '+ Add' button.

#### Languages

Next you will be able to record any languages spoken within the client's household. To do this, start typing in the name of the language and your options will appear automatically. Click on "Enter" on your keyboard or select the language with your mouse. There is also a short list of commonly-used languages at the top of the drop-down menu. **You can select multiple languages in this field.** If a language you need does not appear on the list, please email [link2feed@capitalareafoodbank.org](mailto:link2feed@capitalareafoodbank.org) to let us know that a language is missing from the list!

## Languages

English ✕

### *Ethnicity and Self-Identity*

Next you will see fields for:

\*Ethnicity

\*Self-Identifies As

Please check one (1) or more of the options in these fields. These fields are required, and have the option to answer [Other](#), [None](#), or [Undisclosed](#).

\* Ethnicity

☐ White / Anglo

☐ Black / African American

☐ Hispanic / Latino

☐ American Indian / Native American

☐ Asian

☐ Alaska Native / Aleut / Eskimo

☐ Middle-Eastern / North-African

☐ Pacific Islander

☐ None

☐ Other

☒ Undisclosed

\* Self-identifies As

☐ Military Service - Never Served in the Military

☐ Military Service - Now on Active Duty

☐ Military Service - Only on Active Duty for Training in the Reserves or National Guard

☐ Disability

☐ New Immigrant

☐ Veteran

☐ Refugee

☐ Other

☐ Evacuee

☐ Mental Illness

☐ None

☒ Undisclosed

☐ Pregnant

☐ Postpartum

☐ Breastfeeding

### *Adding Household Members*

Once you have completed all the fields on a client's Personal Page you can add household members. You will do this by clicking the [Add](#) button.

🏠 Household Members

+ Add

Name	Relationship	Gender	Age	Date of Birth
------	--------------	--------	-----	---------------

After you hit the [Add](#) button there will be a pop-up that looks like this:

Household Member Info

\* Last Name

\* First Name

\* Date of Birth

mm-dd-yyyy

Age

\* Gender

\* Relationship

Select Type

☐ Is Date of Birth Estimated?

\* Ethnicity

☐ White / Anglo

☐ Black / African American

☐ Hispanic / Latino

☐ American Indian / Native American

☐ Other

☐ None

☐ Undisclosed

☐ Asian

☐ Alaska Native / Aleut / Eskimo

☐ Middle-Eastern / North-African

☐ Pacific Islander

\* Self-Identifies As

☐ Female Head of Household

☐ Military Service - Active Duty

☐ Military Service - National Guard

☐ Military Service - Never served

☐ None

☐ Undisclosed

☐ Pregnant

☐ Postpartum

☐ Military Service - Reserves

☐ Disability

☐ Veteran

☐ New Immigrant

☐ Refugee

☐ Other

☐ Evacuee

☐ Mental Illness

☐ Breastfeeding

ID Type

+ Add

\* Confirmation

Cancel

Save Changes

Fill in all the required fields for all household members. [Gender](#), [Relationship](#), and [Self-Identifies As](#) all have the option to mark undisclosed if a client does not want to share that information about their household member.

[\\*Last Name](#)

[\\*First Name](#)

[\\*Date of Birth \(MM-DD-YYYY\)](#)

[\\*Gender](#)

[\\*Relationship](#)

[\\*Self-Identifies As](#)

You can add as many household members as needed. Each added household member will appear on the client profile as seen below. **Please note that TEFAP clients must provide at least the [Last Name](#), [First Name](#), and [Date of Birth](#) of each member of their household if they want their household size to be counted toward their TEFAP eligibility.**

Household Members					+ Add		
Name	Relationship	Gender	Age	Date of Birth			
Martha Dandridge Custis Washington	Spouse	Female	29	08 Nov 1987	✎	✕	⌵
Jack Custis		Male	16	11 Mar 2000	✎	✕	⌵
Patsy Custis		Female	6	26 Sep 2010	✎	✕	⌵

Once you have completed the [Personal](#) tab, click the [Save & Next](#) button at the end of the page. If you click [Save Changes](#), you will not be prompted to complete the client's profile, and the profile will be deleted if you do not complete it within 72 hours (per the warning at the top of the page).

## Profile Information Tab

After clicking the [Save & Next](#) button you will be brought to the [Profile Information](#) Tab. This page allows you to collect more background information on the client.

### Education

In this section you will indicate the client's:

#### \*Educational Level

##### Profile Information

See Client in View Mode

##### \* Education Level

- ☒ Grades 0-8
 ☐ Grades 9-11
 ☐ High School Diploma
 ☐ Post Secondary (some)
- ☐ Tradeschool / Professional Accreditation
 ☐ 2 Year Degree
 ☐ 4 Year Degree
 ☐ Master's Degree
- ☐ PhD
 ☐ Undisclosed

Once you have completed this section, click the [Save & Next](#) button at the end of the page to proceed to the next tab.

## Monthly Income Tab

In this section you will indicate a client's:

**\*Monthly Income** (This is the only required field on this page and is especially important for determining a client's eligibility for TEFAP).

**Social Programs** – Indicate if the client receives any of the following benefits (check all that apply)

Monthly Income

\* George Washington (30 years old)

Primary

Income Type

Monthly Amount

☒ Social Security

\$ 1000.00

☐ Disability

\$ 500.00

+ Add

George Washington is receiving the following:

☐ Aid to the Aged, Blind, or Disabled

☐ Head Start

☐ Medicare

☐ Children's Health Insurance Program (CHIP)

☐ Housing Assistance (Voucher, Section 8, or other subsidy)

☐ Other

☐ Free- or reduced-price school breakfast

☐ Low-income Home Energy Assistance Program (LIHEAP)

☐ SNAP (Supplemental Nutrition Assistance Program)

☐ Free- or reduced-price school lunch

☐ Medicaid

☐ Social Security for Disabled Persons

☐ Social Security for Retired Persons

☐ WIC (Supplemental Assistance for Women Infants and Children)

☐ Social Security Survivors Benefits

☐ TANF (Temporary Assistance to Needy Families)

☐ Veterans Aid and Attendance Pension Program

The option to add an income source will appear for all household members, but only the Primary Household Member will have an \* by their name for **Monthly Income**. Primary Household Member is determined by who completes the profile information at your pantry.

To add an income source for your client, click the **Add** button.

Once you have clicked the **Add** button you will need to:

1. Click the radio button (circle) under **Primary** to mark that this person's income is the primary source of income for the household.
2. Select an **Income Type** from the drop-down menu.
3. Enter in the **Monthly Amount** (If you selected **Undisclosed** or **No Income** you do not need to do this).

**Monthly Household Expenses** – add expenses by clicking the **Add** button. This is not a required question.

Monthly Household Expenses

Expense Type

Monthly Amount

+ Add

Monthly Gross Income

\$ 2,000.00

Total Monthly Expenses

\$ 0.00

Monthly Net Income

\$ 2,000.00

The system will calculate the household's total income, total expenses, and total net income.



Once you have completed this section, click the [Save & Next](#) button at the end of the page.

## Services Tab

The first item you will see on this page is a [Household Summary](#) for your client and their household.

Household Summary		
Household Size	4	No. Visits (last 30 days)
Adults (18-59)	2	Social Programs
Seniors (60+)	0	Eligible Programs
Children (0-17)	2	✓ TEFAP Visit
Children's Ages	10 4	

The [Household Summary](#) will show you:

[Household Size](#), with a breakdown by age

[Number of Visits](#) made to a pantry or other program in the last 30 days.

[Social Programs](#) - If the client receives SNAP, TANF, etc.

[Eligible Programs](#) - If the client meets the requirements for TEFAP, etc.

Beneath the [Household Summary](#) you will see blue buttons for a variety of services.

**New TEFAP Visit** ✓ Eligible  
Record A New TEFAP Visit

**New Pantry Visit**  
Record A New Pantry Visit

**New Agency Service**  
Record Custom Wrap-Around Services Outside of a Food Visit

- 1) A button to record a TEFAP pantry visit **if you are a TEFAP partner**
- 2) A button to record a regular (Non-TEFAP) food pantry visit
- 3) A button to record other services that are provided by your organization. This button may be customized to reflect the specific name of the service you provide.

**This example shows three buttons, but your pantry may have more or fewer buttons depending on the food and services you provide.**

To record a service provided to your client, pick the service that they are receiving that day. If they are receiving more than one service (such as a TEFAP visit and a general pantry visit) they will have to be logged separately. If the [New TEFAP Visit](#) button is greyed-out, that means that the client either needs to be certified on the [TEFAP](#) tab or they are not eligible for TEFAP.

Commented [LS1]: TBD

## Recording Services

### TEFAP Pantries

#### *Certifying Clients for TEFAP*

After you've entered a client into Link2Feed for the first time, they will need to be certified for TEFAP. **You must do this in person, as you need to confirm the client's income and social program information before certifying them.**

Certification occurs on the [TEFAP](#) tab.

1. Ask the client if any of their information has changed since the last time they came to your pantry. If they say yes, review their profile with them (Starting on the [Personal](#) tab) and make the necessary changes.

#### *Decoding the TEFAP Eligibility Criteria*

Below is a helpful guide for determining if a client is eligible for TEFAP:

	Social Program Eligibility is Green	Social Program Eligibility is Yellow
Household Size/Monthly Income is Green	Client is eligible	Client is eligible
Household Size/Monthly Income is Yellow	Client is eligible	Client is NOT eligible

2. Before you certify, you may add a [Proxy Signatory](#). This option is helpful if someone else is picking up the food for the client. To add a [Proxy Signatory](#), click [Add a Proxy Signatory](#). You will need to enter that person's [Name](#) and [Phone Number](#). If necessary, you may add multiple [Proxy Signatories](#).
3. If a client is eligible to receive TEFAP, click the [Certify](#) button. The below pop-up will appear (Note that this pop-up should reflect the exact Disclaimer and Statement of Non-Discrimination that are on the paper SDI form):

**Client eSignature**

**Disclaimer**  
I affirm that neither I nor any other household member has received any other TEFAP foods from this or any other pantry within the last 30 days. I certify the above information is true and correct and all income is considered. I understand misrepresentation of eligibility and the sale, exchange or misuse of commodities is prohibited and could result in a fine, imprisonment or both.

**Statement of Non Discrimination**  
In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form (AD-3027) found online at: [http://www.ascr.usda.gov/complaint\\_filing\\_cust.html](http://www.ascr.usda.gov/complaint_filing_cust.html), and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

1. mail: U.S. Department of Agriculture  
Office of the Assistant Secretary for Civil Rights  
1400 Independence Avenue, SW  
Washington, D.C. 20250-9410;
2. fax: (202) 690-7442; or
3. email: [program.intake@usda.gov](mailto:program.intake@usda.gov).

This institution is an equal opportunity provider.

**Signature Type**  
Typed Signature

**Signatory**  
Lauren Sauder

**Client Signature**  
*Type Your Signature Above*

**Date**  
06-20-2019

4. If you are located in Maryland or DC, change the [Signature Type](#) to [Sign on Screen or Scriptel Signature Pad](#) (if you have one plugged into your computer). If you are located in Virginia, you may use the [Typed Signature](#) option.
5. Under [Signatory](#) select the name of the person who is signing for the certification.
6. If you are collecting an electronic signature, click [Open Signature Canvas](#). There are two ways to collect an electronic signature:
  - a. Have the client use your mouse to sign on screen. They will need to press and hold the clicker to sign their name. If you have a touchscreen laptop or tablet, the client may use their finger to sign their name.
  - b. Have the client sign on a signature pad that is plugged into your computer. The signature should appear on the screen as the client signs.
7. Press [Save](#) to exit the [Signature Canvas](#) and save the signature.
8. Scroll down and click [Save](#) to complete the certification.

After you've certified the client, the [New TEFAP Visit](#) button should be blue and you can record a TEFAP Visit for that client.

#### [Recording a TEFAP Visit](#)

To record a TEFAP visit click on the blue [New TEFAP Visit](#) button. If this button is gray, return to the [TEFAP](#) tab to certify the client.

After clicking the [New TEFAP Visit](#) button you will be taken to a page where you can log information about the client's visit.

The [Household Summary](#) will also be on this page. Beneath the [Household Summary](#) you will see a section titled [General Visit Details](#).

Under General Visit Details there are two (2) fields.

**Date** – The date your client received this service. This is a required field. **For TEFAP visits in MD and DC, this should be the same day you are recording the service since you need to collect a signature from the client in person.**

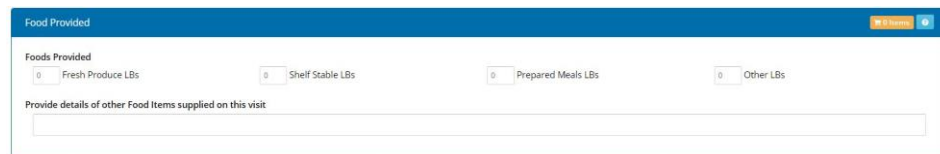
**Delivery Requested** – This field will default to **No**, but you may change it to **Yes** if you did deliver the food for this service.

**What were the reasons for this visit?** This field can be a difficult and awkward question, but it helps us understand why clients are accessing your services. This is not a required field.

Beneath **General Visit Details** is **Who from the household is receiving services for this visit?** This will default to everyone in the household, because we assume that everyone in the household is benefitting even if they do not come to the pantry to receive the food. This function will record a visit for each household member, preventing any other household members from receiving food from your pantry more than once per day.

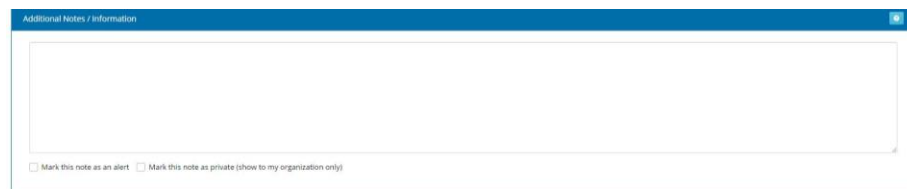


The next field you will see is **Food Provided**. This field is optional, but you may use it to record the quantities of food that the person receives. You may also provide other details of the food provided if you wish to do so. **This field can be helpful to track the food you distribute. For example, if you want to know how many vegetarian bags you distributed in a month, you would track that here. We can customize this field per your program specifications.**



You can add notes at the end of recording your client's visit if you wish to. There are two options for Notes:

1. **Mark this note as an alert:** This makes the note visible to any Link2Feed user in the CAFB network (Think: Other CAFB partner pantries)
2. **Mark this note as private (Show to my organization only):** This makes the note visible only to users at your pantry. Other CAFB partner pantries will not be able to see this note.



At the bottom of the Visit page you will again collect the client's signature. Follow the same signature process that you followed to certify the client.

A screenshot of a web form titled "Client eSignature". On the left, there is a "Disclaimer" section with a "Disclaimer" label. On the right, there are two dropdown menus: "Signature Type" (set to "Typed Signature") and "Client Signature". Below these is a text input field containing the handwritten text "Type Your Signature Above". At the bottom right, there is a "Date" field with the value "2017-01-03".

Once you have entered in all the information for a client visit, click [Save](#) at the bottom of the page. You will return to the [Services](#) tab and a green box will appear at the top of the page confirming that the visit was recorded.

### Recording a Regular Pantry Visit

To record a [Regular Pantry Visit](#) click on the [New Regular Pantry Visit](#) button.

After clicking the program button you will be taken to a page where you can log information about the client's visit.

The [Household Summary](#) will also be on this page. Beneath the [Household Summary](#) you will see a section titled [General Visit Details](#).

Under General Visit Details there are two (2) fields.

**Date** – The date your client received this service. This is a required field. **For TEFAP visits in MD and DC, this should be the same day you are recording the service since you need to collect a signature from the client in person.**

**Delivery Requested** – This field will default to [No](#)

**What were the reasons for this visit?** This field can be a difficult and awkward question, but it gives us a better picture of food insecurity in our region. This is not a required field.

Beneath [General Visit Details](#) is [Who from the household is receiving services for this visit?](#) This will default to everyone in the household, because we assume that everyone in the household is benefitting even if they do not come to the pantry to receive the food. This function will record a visit for each household member, preventing any other household members from receiving food from your pantry more than once per day.

A screenshot of a web form titled "Who from the household is receiving services for this visit?". At the top right, there are two buttons: "Select All" (green) and "Deselect All" (red). Below these buttons is a list of names with checkboxes: "George Washington", "Martha Dandridge Custis Washington", "Jack Custis", and "Patty Custis". All four checkboxes are checked.

The next field you will see is [Food Provided](#). This field is optional, but you may use it to record the quantities of food that the person receives. You may also provide other details of the food provided if you wish to do so. **This field can be helpful to track the food you distribute. For**

example, if you want to know how many vegetarian bags you distributed in a month, you would track that here. We can customize this field per your program specifications.

You can add notes at the end of recording your client's visit if you wish to. There are two options for Notes:

1. [Mark this note as an alert](#): This makes the note visible to any Link2Feed user in the CAFB network (Think: Other CAFB partner pantries)
2. [Mark this note as private \(Show to my organization only\)](#): This makes the note visible only to users at your pantry. Other CAFB partner pantries will not be able to see this note.

You will return to the [Services](#) tab and a green box will appear at the top of the page confirming that the visit was recorded.

### Recording Non-Food Program Visits

To record any non-food related services provided to the client simply click on the blue button that corresponds with that program.

After clicking the program button you will be taken to a page where you can log information about the client's visit.

The [Household Summary](#) will also be on this page. Beneath the [Household Summary](#) you will see a section titled [General Visit Details](#).

Under General Visit Details there are two (2) fields.

**Date** – The date your client received this service. This is a required field. **For TEFAP visits in MD and DC, this should be the same day you are recording the service since you need to collect a signature from the client in person.**

**Delivery Requested** – This field will default to [No](#)

**What were the reasons for this visit?** This field can be a difficult and awkward question, but it gives us a better picture of food insecurity in our region. This is not a required field.

Beneath [General Visit Details](#) is [Who from the household is receiving services for this visit?](#) This will default to everyone in the household, because we assume that everyone in the household is benefitting even if they do not come to the pantry to receive the food. This function will record a visit for each household member, preventing any other household members from receiving food from your pantry more than once per day.

The next field you will see is [Food Provided](#). This field is optional, but you may use it to record the quantities of food that the person receives. You may also provide other details of the food provided if you wish to do so. **This field can be helpful to track the food you distribute. For example, if you want to know how many vegetarian bags you distributed in a month, you would track that here.** *We can customize this field per your program specifications.*

You can add notes at the end of recording your client's visit if you wish to. There are two options for Notes:

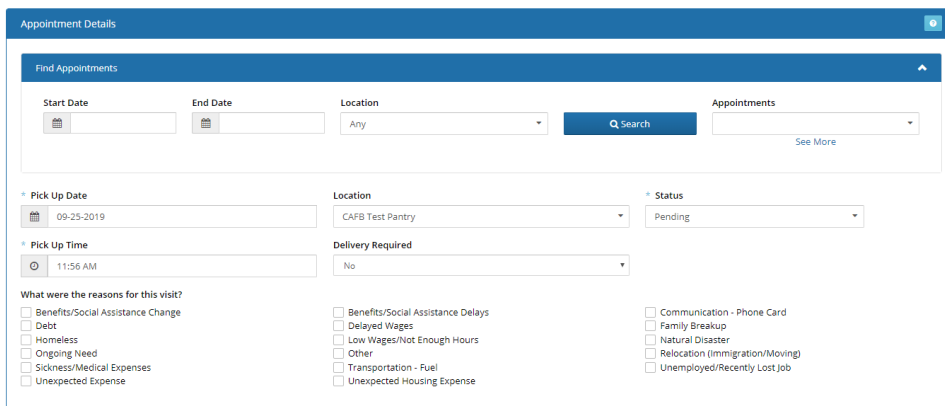
1. [Mark this note as an alert](#): This makes the note visible to any Link2Feed user in the CAFB network (Think: Other CAFB partner pantries)
2. [Mark this note as private \(Show to my organization only\)](#): This makes the note visible only to users at your pantry. Other CAFB partner pantries will not be able to see this note.

You will return to the [Services](#) tab and a green box will appear at the top of the page confirming that the visit was recorded.

## Scheduling an Appointment

To schedule an appointment for a client, click the [New Appointment](#) button for the services the client will receive (If the client will receive TEFAP, click the New TEFAP Appointment button. If the client is not eligible for TEFAP and will receive regular pantry food, click the New Pantry Appointment button).

This will open a page that looks like this:



The screenshot shows the 'Appointment Details' form. At the top is a 'Find Appointments' section with fields for 'Start Date', 'End Date', 'Location' (a dropdown menu), a 'Search' button, and an 'Appointments' dropdown menu with a 'See More' link. Below this is a section for appointment details with fields for 'Pick Up Date' (09-25-2019), 'Pick Up Time' (11:56 AM), 'Location' (CAFB Test Pantry), 'Status' (Pending), and 'Delivery Required' (No). At the bottom is a section titled 'What were the reasons for this visit?' with a grid of checkboxes for various reasons: Benefits/Social Assistance Change, Debt, Homeless, Ongoing Need, Sickness/Medical Expenses, Unexpected Expense, Benefits/Social Assistance Delays, Delayed Wages, Low Wages/Not Enough Hours, Other, Transportation - Fuel, Unexpected Housing Expense, Communication - Phone Card, Family Breakup, Natural Disaster, Relocation (Immigration/Moving), and Unemployed/Recently Lost Job.

The top section allows you to search for available appointments within a given time frame.

Enter the start date and end date of the timeframe you'd like to search for available appointments.

From the [Appointments](#) drop-down menu, select the date and time you'd like to schedule the client for. Select your pantry as the [Location](#) for the appointment. This menu will update automatically once an appointment is saved.

Once you select an appointment from the drop-down menu, the [Pick Up Date](#), [Location](#), [Status](#), and [Pick Up Time](#) will update.

If the client volunteers the information, record their reason(s) for creating the appointment.

Keep all other information on the screen as is. Scroll to the bottom of the page and select [Save](#).

To record that the client showed up for their appointment and collected their food, navigate to their [Services](#) tab.

Scroll to the bottom of the page, where their visits are listed, and find the appointment.

Click the [Edit](#) button, and change the status of the Visit from [Pending](#) to [Collected](#).

If this is a TEFAP visit, collect the client's signature, scroll to the bottom of the page, and click [Save](#).



## Notes Tab

The next section of the Client Profile is the [Notes](#) tab. All notes entered on visits will also appear on this tab.



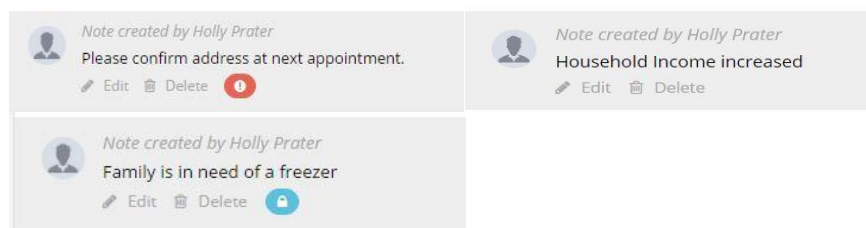
To add a Note or Alert to the client profile click on the “New Note” button at the top of the screen and a pop up will appear.

A screenshot of the 'Edit a Note' pop-up form. It has a title bar 'Edit a Note' with a close button. Below the title is a large text area for writing the note. At the bottom, there are two checkboxes: 'Mark this note as an alert' and 'Mark this note as private (show to my organization only)'. At the very bottom are 'Cancel' and 'Save' buttons.

Once you’ve typed in your note you have three (3) ways in which it can be saved.

1. Click the [Save](#) button to save your note as a normal note.
2. Select whether you want to [Mark this note as an alert](#) or [Mark this note as private \(show to my organization only\)](#).

Below are examples of how these three (3) options will appear on a client’s page.



## Activity Tab

The last tab of a client's profile is the [Activity](#) tab. At the top of the tab, you will see when the profile was first created and when it was last updated.

## Change Log

The [Change Log](#) shows the historical activity on a client's profile and allows you to track when and by who changes were made. You can use the arrows by each column header to sort the table by that column, either alphabetically or chronologically depending on whether the column contains text or numbers.

The [Change Log](#) will allow you to see profile changes made by users across our partner network. This allows for better communication across our network when we see information changes that we don't understand. If you have questions about something you see on this tab, email [link2feed@capitalareafoodbank.org](mailto:link2feed@capitalareafoodbank.org).

Details						
Date of Creation		Date of Last Update				
03-07-2018 @ 11:05 AM		07-16-2019 @ 10:54 AM				

Change Log						
<div>Copy CSV PDF Print</div> <div>Per page: 10 Search in History</div>						
Date	Worker	ID (Client or Household)	Field	Previous Value	New Value	
07-16-2019 @ 10:54 AM	Lauren Sauder	Client ID: 22043	Income Amount		1000.00	
07-16-2019 @ 10:54 AM	Lauren Sauder	Client ID: 22043	Income Type		General Income	
02-13-2019 @ 11:48 AM	Paul Kugler	Client ID: 22054	Marital Status		Undisclosed	
03-07-2018 @ 11:25 AM	Sasha Hollister	Client ID: 22054	Gender		female	

## Duplicate Clients

Link2Feed will give you warning messages for possible duplicate clients while you are entering a client's information in the system.

When entering client's information on the Personal Page, after you've put in their Last Name & First Name, you may see a message like this:

Last Name

Washington

First Name

George

Date of Birth

Age

Gender

Is Date of Birth Estimated?

Possible Duplicate

11861 Washington, George 1986-02-04

View Ignore Dismiss

If you are alerted to a possible duplicate, always click View/See More and review the person's profile. This is the only way to ensure that you are not entering a client who has already been given a profile in the system by another pantry.

## Barcoding

### Introduction

#### Why Barcoding?

We know that the transition to an electronic intake system can be challenging, and we want to help make the transition as smooth as possible. Link2Feed's barcoding system, once implemented, shortens the intake process and reduces user error, allowing pantry managers and volunteers to focus on what matters most: feeding their community members.

#### How Does it Work?

CAFB will provide you with a barcode scanner and barcoded key cards to distribute to your clients. If a client has a key card when they arrive at your pantry, you can use the barcode scanner to scan their card rather than searching for their name in the system.

### Implementing Barcoding...

#### If you're just getting started on Link2Feed

Use the paper intake forms provided to you by the Service Insights Specialist. These forms should have a dedicated space at the top right of the front page for a barcode sticker. CAFB will provide you with barcoded key cards as well as stickers that correspond to the barcoded key cards. As clients complete and return their intake form, you will follow this process:

1. Read over the intake form to ensure that it is complete, focusing on required questions (marked with an asterisk \*). If a client does not want to answer a question, make sure they understand that they can answer "Undisclosed."
2. Remove a barcode sticker from the roll provided to you and attach it to the intake form in the designated box in the upper right-hand corner of the front page. Detach the corresponding barcoded key card (making sure the numbers on the card match the numbers on the sticker you attached to the form) and give the card to the client.

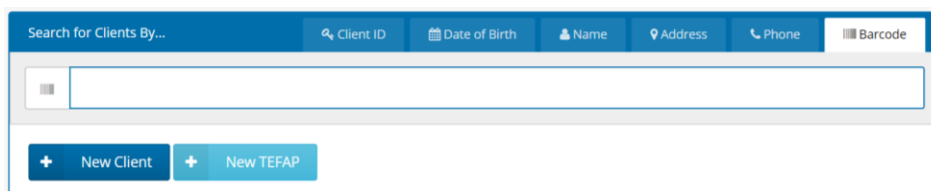
**Please note that Link2Feed will not recognize the barcode until you have entered it into the client's profile (after Email Address and Phone Number). You will need to wait until your live distribution to scan clients' key cards.**

#### *Recording Visits with Barcodes Via QuickClick*

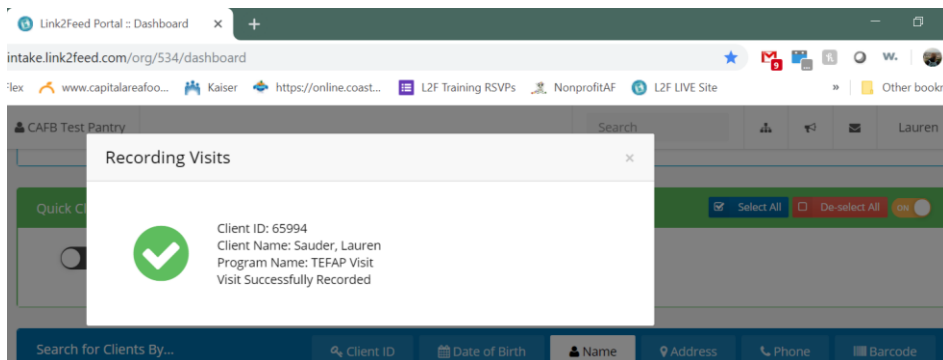
1. Toggle Quick Click Programs to "On" and toggle on the program you wish to record visits for (see below).



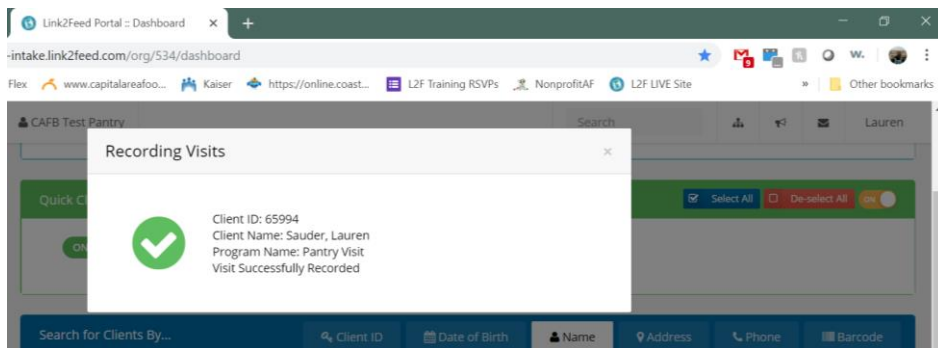
2. Ensure that your search term is set to [Barcode](#). Your Agency Manager can set this as your default search function in your User Profile under [Misc](#).



3. Click inside the search bar to ensure that your cursor is blinking inside the box.
4. Make sure your barcode scanner is plugged into your computer and then scan the client's key card.
5. If you are recording a TEFAP visit, an additional box will pop up, required a signature from the client. Use your screen or your signature pad to collect the signature from the client and select [Save](#) at the bottom left-hand corner of the signature canvas. Then scroll down and click [Save](#) at the bottom right-hand corner of the pop-up box. You will see the following confirmation that the visit was recorded:



6. If you are recording a Regular Pantry visit or a visit for another program, the visit will automatically save. You will see the following confirmation that the visit was saved:



If the client is in profile review, you will instead be taken to the client's profile to review their information. After you have clicked through each tab, you will be able to record a visit on the Services tab.

If you attempt to record a TEFAP visit for a client who needs to be certified or recertified, you will be taken to their profile to review their information and then certify them on the TEFAP tab. After you have successfully certified them, you will be able to record a visit on the Services tab.

### If you've already gone live in Link2Feed

If you have already begun using Link2Feed, you will need to assign clients' their barcode numbers as they check in for your distribution. This will take extra time, but CAFB staff will be available to provide support to minimize disruptions to your distribution.

1. As each client comes to check in, pull up their profile in Link2Feed.
2. Navigate to their [Personal](#) tab and scroll down to the [ID](#) section (this is right below [Email Address](#) and [Phone Number](#)).
3. Click [Add](#) to add a new ID Type.
4. Select [Barcode](#) from the drop-down menu and click inside the text box so that your cursor is blinking.
5. Separate a barcoded key card from the sheet provided to you and scan it with your barcode scanner.
6. Confirm that the number in the text box matches the key card in your hand and then hand the card to the client.
7. Click [Save and Next](#) and then navigate to the client's Services tab.
8. Record the appropriate visit for the client, collecting a signature if recording a TEFAP visit.

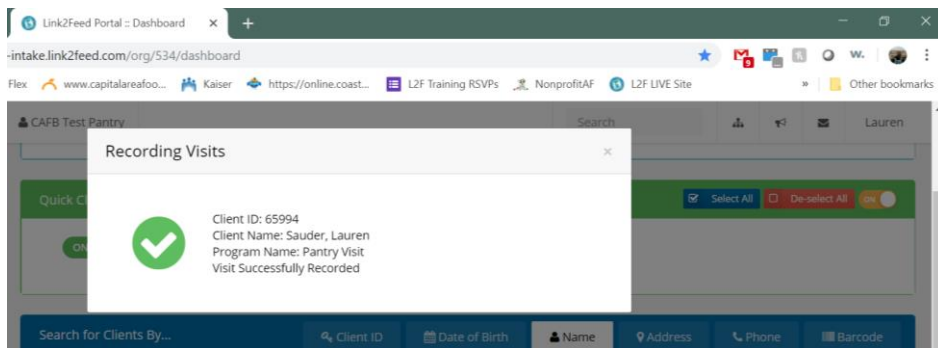
### Recording Visits with Barcodes Via QuickClick

1. Toggle Quick Click Programs to "On" and toggle on the program you wish to record visits for (see below).

2. Ensure that your search term is set to [Barcode](#). Your Agency Manager can set this as your default search function in your User Profile under [Misc](#).

3. Click inside the search bar to ensure that your cursor is blinking inside the box.
4. Make sure your barcode scanner is plugged into your computer and then scan the client's key card.
5. If you are recording a TEFAP visit, an additional box will pop up, required a signature from the client. Use your screen or your signature pad to collect the signature from the client and select [Save](#) at the bottom left-hand corner of the signature canvas. Then scroll down and click [Save](#) at the bottom right-hand corner of the pop-up box. You will see the following confirmation that the visit was recorded:

6. If you are recording a Regular Pantry visit or a visit for another program, the visit will automatically save. You will see the following confirmation that the visit was saved:

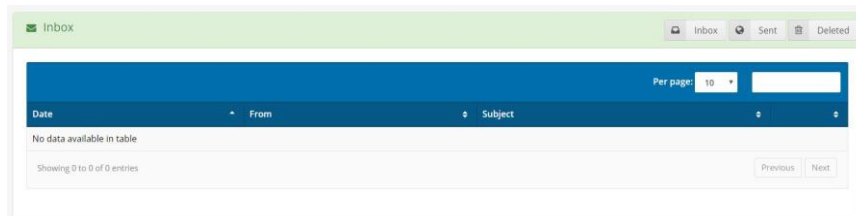


If the client is in profile review, you will instead be taken to the client's profile to review their information. After you have clicked through each tab, you will be able to record a visit on the Services tab.

If you attempt to record a TEFAP visit for a client who needs to be certified or recertified, you will be taken to their profile to review their information and then certify them on the TEFAP tab. After you have successfully certified them, you will be able to record a visit on the Services tab.

## Message Center

Link2Feed offers the ability to send messages. To send a message go to "Messages" in the menu on the left hand side of the screen. **If you do not see this option, email [link2feed@capitalareafoodbank.org](mailto:link2feed@capitalareafoodbank.org) to have this feature enabled for your user account.** You will be brought to your Link2Feed User Inbox. Click on the "New Message" button at the top of the screen to send a message.



There are a few options when sending a message:

Importance – Rank the level of importance of your message (low, normal, high, or urgent).

Recipients – Select those that you want to receive this message. Send a message to a specific Organization, User or Group.

Subject – Title your message.

## Message – Type in the body of your message

Compose New Message

From

Holly Prater

\* Importance

Normal

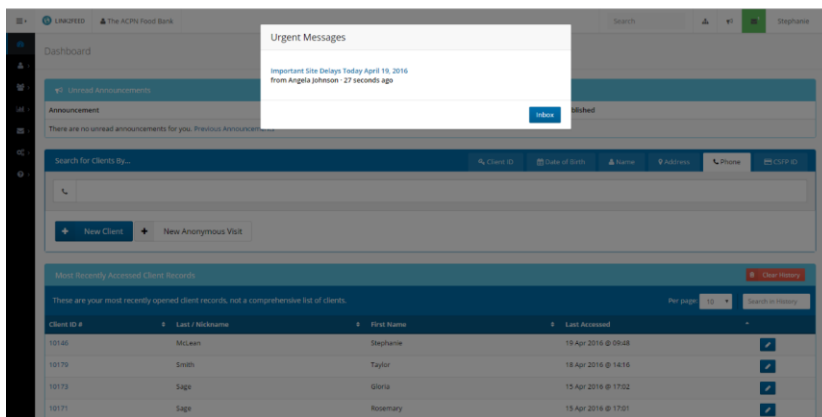
\* Recipients

Select recipients

\* Subject

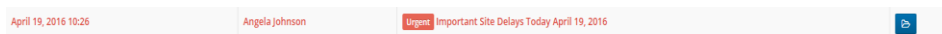
\* Message

A Message can be sent with low, normal, high, or urgent importance. Sending a message out as urgent will result in the person(s) receiving this message seeing this popup on every screen they click in Link2Feed.



The recipient(s) of this message will be unable to enter in client data, run reports, etc. until they have read and acknowledged the urgent message, by clicking the [Acknowledge this Message](#) button.

In the [Message Inbox](#) an urgent message will appear as it does below. This message must be viewed by clicking the blue icon of an open folder on the right side.

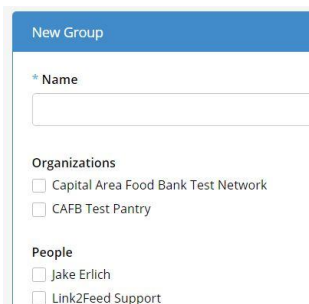




You can create Message Groups in Link2Feed. In the menu on the left hand side of the screen, under [Messages](#) click [Groups](#). To create a new group click on the [New Group](#) button in the top right hand side of the screen.



You can name your group and select as many users listed as you would like to include in your group. Once you've finished selecting all those you wish to include in your group, click the [Save](#) button at the bottom of the screen.



## Reporting

Link2Feed's robust reporting system offers a wide variety of reports to fit your needs. When you are pulling reports, it's important to understand the difference between [Unique](#) and [Duplicated](#) data.

1. [Unique](#) = Each client is counted once regardless of how many times they visited during the time period (e.g. Mary Smith visited 3 times in May but is only counted once in the unique count)
2. [Duplicated](#) = Each client is counted for every time they visited during the time period. (e.g. Mary Smith visited 3 times in May and is counted 3 times in the duplicated count)

Link2Feed also distinguishes between [Clients](#), [Individuals](#), and [Households](#).

1. [Client](#) = The person who comes to your pantry to receive the food. This is the person whose profile you pull up to record a service.
2. [Individual](#) = Members of a client's household. These are the people who are not coming into the pantry to receive the food but are benefitting from a family member or friend who is coming into the pantry to receive the food.
3. [Household](#) = Includes both clients and individuals.

## Report Basics

All reports have the same basic set-up functions:

1. [Titled](#)
2. [That is](#)
  - a. [Just for me](#) (this report will only be visible in your report inbox)
  - b. [Shared with people from \(Agency Name\)](#) (this report will be visible in the report inbox of every user at your organization)
3. [To be run](#) – You can schedule report to run on a regular (weekly, monthly, yearly) basis.

4. **Starting on** – Be mindful of the date and time you set the report to start recurring. For example, if you want to receive the report by 5:00 PM at the end of each month, set the time for 5:00 PM. You (and any other users who this report is shared with) will receive an email (at the email you have registered with Link2Feed) when your report is ready.
5. **For the following time period** – You can select a fixed time period or select your own dates. **If this will be a recurring report, select a fixed time period from the drop-down menu or else the report you receive in the future will always be for the same dates you defined. (e.g. If Sue wants a report on the previous month at the start of each month, she'll select Last Month from the drop-down menu)**
6. **For the following** – You will only be able to report on your organization's data. Type your organization's name into the **Organizations** search bar and hit enter when the correct agency is highlighted.

Below is a summary of each report and the metrics it provides:

## Generic Program Report

Reports on all programs **except** Regular Pantry, TEFAP, and CSFP.

Provides information on:

- Total people served by program name (duplicated)
- Total visits by program name (duplicated)

## Heat Map Report

This *mapped* report shows heat signatures that represent the concentration of different groups in relation to CAFB pantries using Link2Feed. This report can help you see where clients are traveling from to visit your pantry.

Groups you can report on:

- Household age group
- Undisclosed clients
- Female clients
- Unique households
- Male clients
- Students
- Transgender clients
- Total visits

## Interactive Household Report

This report allows you to play with the data and filter for specific groups.

You can pivot the data from this report based on:

- Age group: Individuals (Unique)
- City of Residence: Individuals (Unique)
- County: Individuals (Unique)
- Dietary considerations: Individuals (Unique)
- Education (Country): Individuals (Unique)- CAFB does not currently collect this information
- Highest education level attained: Individuals (Unique)
- Employment: Individuals (Unique)- CAFB does not currently collect this information
- Ethnicity: Individuals (Unique)
- Gender: Individuals (Unique)
- Housing status: Individuals (Unique)
- Income (Net): Individuals (Unique)
- Income sources (Primary): Household (Unique)
- Individuals in a Household of "x" size
- Languages: Individuals (Unique)
- New vs Existing: Individuals (Unique)
- Referred by: Individuals (Unique)- CAFB does not currently collect this information
- Referred to: Individuals (Unique)- CAFB does not currently collect this information
- Self identifies as: Individuals (Unique)
- Visits: Number of visits: Individuals (Duplicated)
- Zip/Postcode: Individuals (Unique)

*For example:*

John wants to know the dietary considerations of seniors served at his pantry. To find this information, John will:

1. Pull an [Interactive Household Report](#)
2. Navigate to the [Age Group: Individuals \(Unique\)](#) section of the [Interactive Household Report](#) and click [Pivot](#) next to [60+ Years](#)
3. John can then scroll down to the [Dietary Considerations: Individuals \(Unique\)](#) section of the report to see the specific dietary considerations of seniors served at his pantry.

To return to the main page of the report, click [Remove All](#) under any of the section headings.

## Pantry Report

This report provides a donut chart and bar graph for each data point.

- Age Group: Individuals (Duplicated & Unique)
- Served: Household/Individuals (Duplicated & Unique)
- Visits: Quantity of Food Provided (Duplicated)

## Statistics Report

This report provides a summary chart, donut chart, and bar graph for each data point collected in Link2Feed.

## Client Status Report

This report provides insights into client and household activity during a specific time period.

- Historical average rate of visits per household served in time period
- Historical total visits per household served in time period
- Household status over time period (active, inactive)
- Inactivity frequency
- Inactivity length

## Support

If you have any questions or run into any issues, you may contact the following people:

### Rollout & User Support

Lauren Sauder- Service Insights Specialist

[lsauder@capitalareafoodbank.org](mailto:lsauder@capitalareafoodbank.org)

202-644-9832

### MD/DC TEFAP

Camille Murphy

[cmurphy@capitalareafoodbank.org](mailto:cmurphy@capitalareafoodbank.org)

202-644-9820

## MD Region

Jeovanny Paz

[jpaz@capitalareafoodbank.org](mailto:jpaz@capitalareafoodbank.org)

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## DC Region

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