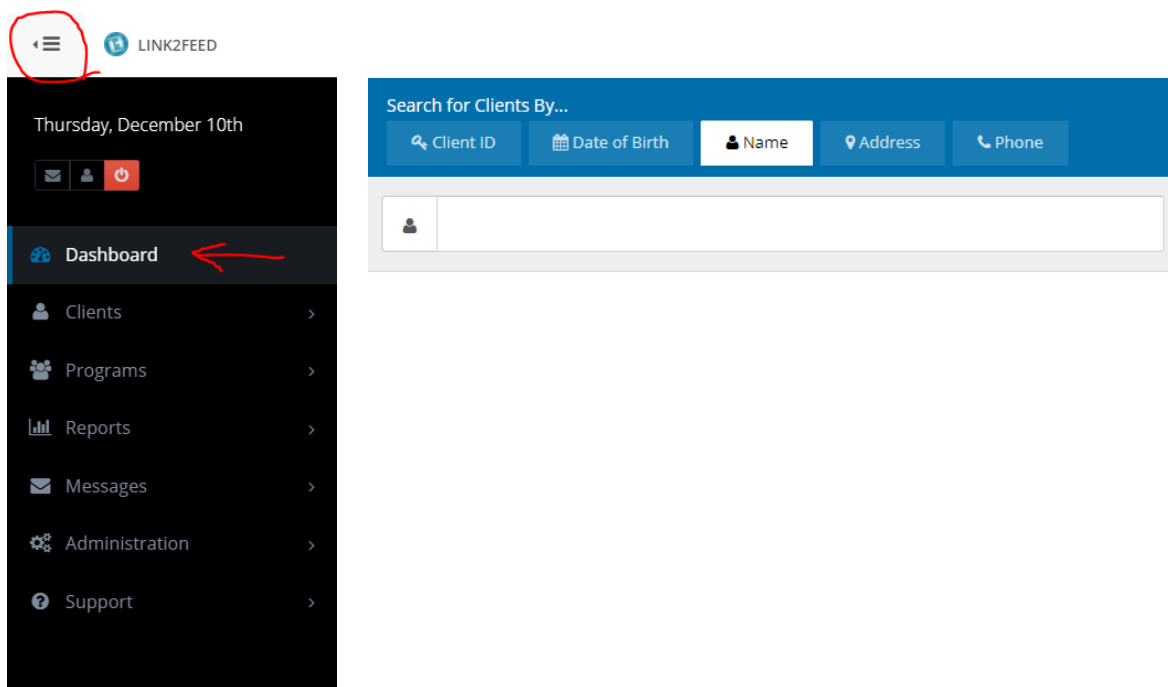




Link2Feed Live Check-in Cheat Sheet (TEFAP)

For any questions not answered in cheat sheets or issues during pantry, please call or text Amber at (703) 283-6379 or Carolina at (727) 631-3509.

- Open either Chrome, Firefox, or Safari (if Mac user) browser (**Internet Explorer will not work!**).
 - Type **portal.link2feed.com** into the URL bar.
 - Log in by using your username and password.
 - i. Username is your personal email address.
 - ii. If you cannot remember your password, you can reset the password through your email or contact Carolina or Amber to reset for you.
- 2) Begin check-in by searching for the client to see whether they are already in the database. You can begin a search for a client by going to Dashboard and using the search bar.



- You can search in multiple ways:
 - i. Client ID number is the best way to search if the client has a card with ID number.
 - ii. By first name, last name, both, or partial words.



1. You can search for a client with the first three letters of the first and last names. For example, if the name is Buffy Williams, search "buf wil" to avoid an overwhelming number of results while also minimizing the chance of a typo.
 - iii. By date of birth; the format must be **mm/dd/yyyy**
 - iv. You *cannot* search by phone number or address.
 - v. To search by name, date of birth, or client ID, make sure to change the tab over the search bar (you can search by ID# under the "Name" tab instead of switching to the "Client ID" tab).
- **If a client does not appear in the drop-down search menu, but indicates they already completed paperwork and should already be in the database, try these tricks:**
 - i. Try searching by **different spellings of name, date of birth or client ID number**. This will be helpful if the name was previously entered into the database incorrectly.
 - ii. Ask client if they signed up by filling out a paperwork, in which case they may not be registered in the database yet.
 - iii. Search by other household members. If there are multiple people in the household, you can search for another member and then open the "Personal" tab and scroll to the bottom to make sure the current client was entered as part of the household.
 - iv. If you are doing *live registration*, please go ahead and register the client directly into L2F.
 - **If you notice that a client's name is spelled incorrectly in the system, please correct it in the "Personal" tab, or ask Amber or Carolina to correct later.**

A screenshot of a web application's search interface. At the top, there is a blue header bar with the text "Search for Clients By..." followed by five tabs: "Client ID", "Date of Birth", "Name", "Address", and "Phone". The "Name" tab is currently selected. Below the header, there is a search input field with a person icon on the left and the text "john doe" inside. Below the input field, a dropdown menu is open, showing three search results. Each result consists of a name "Doe, John" and a date of birth. The first result has a date of "01-02-2015". The second result has a date of "07-01-1990". The third result has a date of "01-01-1990". To the left of the dropdown menu, there is a blue square button with a white plus sign.



LINK2FEED AFFB Alta Vista Elementary Search Carolina

Thursday, December 10th

Alert 1 ✕

Last Updated: 09-16-2020 @ 09:28 AM
TEFAP filed 08/26/2020
No proxy
Please complete this L2F profile after COVID19

PERSONAL MONTHLY INCOME SERVICES NOTES ACTIVITY

- If there are multiple clients listed under the same name, you can identify the correct profile by verifying the date of birth, which will also be listed in the drop-down.
- If the client has already been registered in the database, you can click on their name from the drop-down menu and **proceed to check them in**.
- Once you have selected the client's name from the drop-down menu, you will be sent directly to the **"Services"** tab.
 - i. If you are sent instead to the "Personal" tab and asked to review the profile, please review client address and number of household members, then click "Save & Next" at the bottom of the page until you are directed to the "Services" tab.
- When you are ready to check-in the client's visit, click on the blue, square button for the corresponding pantry*.

***Make sure to select the correct pantry.**

New TEFAP Mobile Pantry ✓ Eligible New Fresh Produce Program

- **Ensure that a red banner appears at the top of the page with the date the TEFAP form was signed.** This is also where a proxy will be listed if one has been designated. **If it has been more than a year since their TEFAP was signed, please fill out a new TEFAP form with updated client information.**



Alert 1 ✕

Last Updated: 2018-01-19 @ 09:02
Form filed: 12/17/17.
Proxy pick up: Ron Howard

✓ PERSONAL

✓ MONTHLY INCOME

✓ SERVICES

✓ NOTES

Personal Information
[See Client in View Mode](#)

Flinstone, Fred 19806

- i. If this banner does not appear, you can check in the “Notes” tab to make sure there is not a TEFAP note there.
- ii. If no red banner appears, **the client will need to fill out the TEFAP form.**
 1. Be sure ALL fields on TEFAP form are completed (including city, zip, and eligibility).
 2. Be sure to ask if they would like to note a proxy to pick up for them, and to mark this at the bottom of the form (proxy must be someone who does not live in the same household as the client).
 3. **If client later wants to add a new proxy for future pick-up, they must sign a new TEFAP form.**
 4. If client is NOT listed as a proxy for someone, they may NOT pick up for that person until the person has signed a TEFAP form designating them as proxy.
- iii. **After filling out the TEFAP form, please add a “New Note” under the “Notes” tab to note the newly filed TEFAP form.** The note in the red banner should always read:
TEFAP filed [Date]; No Proxy or Proxy: [Name]
Please remember to check off “Mark this note as an alert” otherwise the banner will not appear.



Additional Notes / Information

TEFAP form filed 12/10/2020
Proxy: Jane Doe

☒ Mark this note as an alert ☐ Mark this note as private (show to my organization only)

iv. When checking in a TEFAP client, you will need to check the box stating that client has signed the hard copy.

1. If the client has a red banner with “form filed” date within the last year, they do NOT need to fill out a new form.

Client eSignature

The client must sign the form before you can save the changes.

Disclaimer
I certify that my yearly household gross income is at or below the income listed on this form for households with the same number of people OR that I participate in the program(s) that I have checked on this form. I also certify that as of today, I reside in the State of Florida. This certification is being submitted in connection with the receipt of Federal assistance. Program officials may verify what I have certified to be true. I understand that making a false certification may result in having to pay the State agency for the value of the food improperly issued to me and may subject me to civil or criminal prosecution under State and Federal law.

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

* Signature Type
Hard Copy Signature

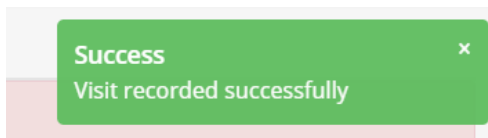
* Client Signature
☒ Client has Signed Hard Copy

Date
2018-01-19

Who from the household is receiving services for this visit?

☒ Carolina Test ☒ Loulou Test ☒ Test Account

- 3) Leave all names checked for the question about which household members are receiving services for the visit and mark **“Client has Signed Hard Copy”**.
- 4) **Log the visit by clicking “Save” in the bottom right-hand corner of the page.** A green pop-up will appear in the top right-hand corner informing you that the visit has been logged successfully.

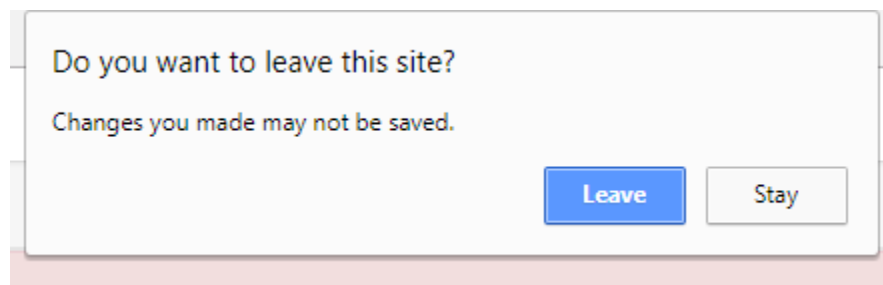




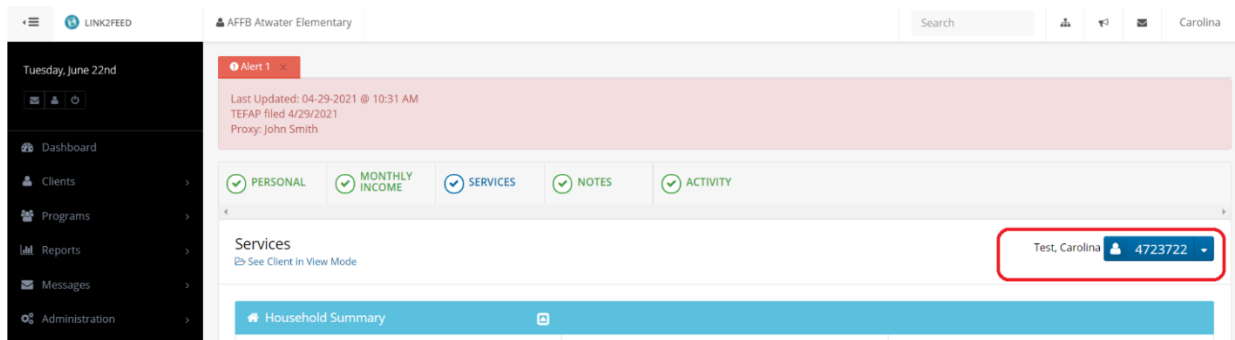
- 5) You can verify that you successfully logged the visit by scrolling down to the bottom of the “Services” tab. The visit(s) you recorded will appear on the log.

Visit / Service Date	Location / Program	Summary / Items Provided	
2018-01-19	Location Partner Agency Training Program Mobile Pantry		
2017-12-19	Location Partner Agency Training Program TEFAP Mobile Pantry		

- 6) When navigating away from the services page to check in a new client, a dialog box may appear asking if you are sure you want to leave the page. If you have already Saved the visit, choose “Leave.” If not, choose “Stay.”



- 7) Ask client if they have already received an ID card*. To issue a card, write in their name (make sure to spell correctly) and client ID number. Client ID is in the top right-hand corner of the Services tab.

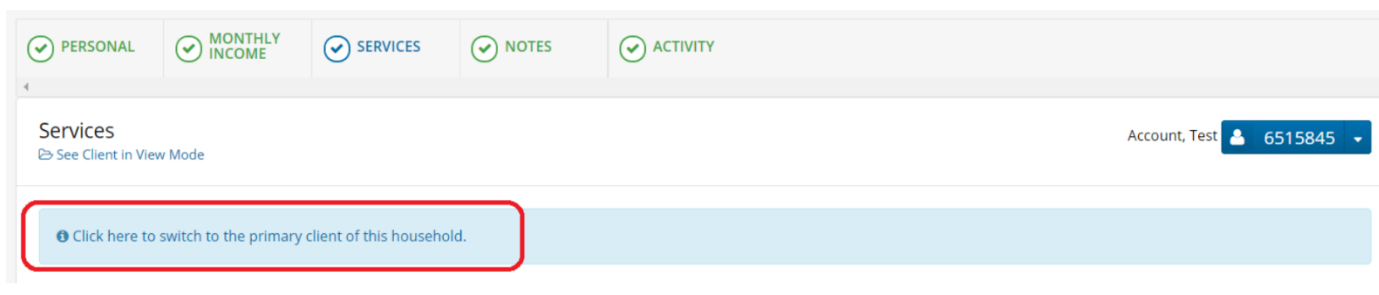


*Only the “primary client” can receive a client card.



If the client is **not** a “primary client,” you will see the indicator appear underneath the client’s name and ID.

Please click on the blue banner to switch to the “primary client.”



8) Check-in is complete!

Alert Features in Link2Feed

Profile Review

When a client has not visited a pantry in more than 180 days, Link2Feed will automatically flag the client’s profile for a review to help ensure that client information stays up to date.

Profile Review Required — This client has not visited in over 180 days. You must review the profile.

You must click "Save" or "Next" on each page in order to continue.

You will see an alert that says, “Failed” – sounds ominous but you haven’t failed anything!

Failed
The requested page "services", cannot be accessed until a profile review has been completed.

This alert is to notify you that you will not be able to record a visit in the “Services” tab until you review “Person” and “Monthly Income” tabs.

During check-in, please check for **changes in these four fields**: address, total number of household members, receipt of benefits such as SNAP (food stamps) and Medicaid, and income.

Go ahead and click **Save & Next** at the bottom of each page until you reach the “Services” tab for recording a visit.



Duplicate Visit Alert

Link2Feed will not allow you to record more than one visit per household at TEFAP pantries. In other words, if more than one person from the same household tries to pick up at the *same pantry on the same date*, Link2Feed will alert you.

This alert is unique to only TEFAP pantries.

⊘ A visit for this clients household has already been recorded for the program today.

You can also check the client visit log in the “Services” tab underneath the check-in button to see if a visit has already been recorded for a given pantry.

New TEFAP Mobile Pantry ✓ Eligible

Last Profile Review
Jul 26th — 51 days ago
☒ Review Profile On Next Visit

Last Visit to Agency
Sep 15th — today

Visit / Service Date	Location / Program	Summary / Items Provided
09-15-2021	Location AFFB Booker Middle Program TEFAP Mobile Pantry	

Showing 1 to 1 of 1 entries

Per page: 25

Previous 1 Next

You can review additional household members at the bottom of the “Personal” tab to clue in clients on who from the household could have visited the same pantry already.

Household Members

Name

Elmo Muppet

Fake Account