# Link2Feed Live Check-in (non-TEFAP)

**Please call Amber at (703) 283-6379 or Carolina at (727) 631-3509 if you need help.**

1) For check-in, log in to Link2Feed.
   - Open either Chrome or Firefox browser (**Internet Explorer will not work!)**
   - Type http://portal.link2feed.com into the URL bar
   - Log in using your username and password
       i. Username is likely your personal email address
       ii. If you cannot remember your password, try: **Data2020!**
       iii. If this does not work, you can reset the password using your email, or call Alex to reset for you.
2) Begin check-in by searching for the client to see whether they are already entered into the system. You can begin a search for a client by clicking Dashboard, and entering into the search bar there.
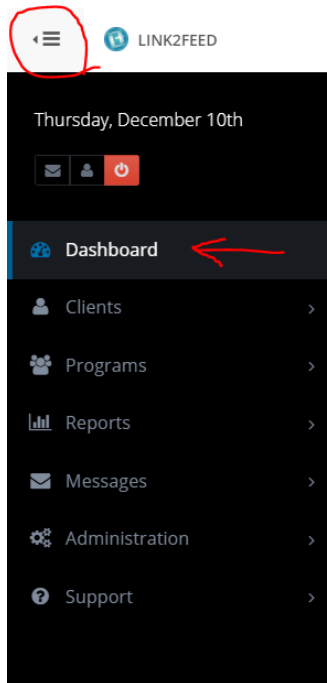


   - You can search in multiple ways:

i. Client ID number is by far the best way to search if the client has a card with their ID number on it.

ii. By first name, last name, both, or partial word.

1. It is often easiest to search with the first three letters of the first and last name. For example, if client is named 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, using this format: mm/dd/yyyy

iv. By address

v. You cannot search by phone number.

vi. To search by address, name, date of birth, or client ID, make sure to change the tab over the search bar. Be sure to change it back afterward if you wish to resume searching by name.

- **If a client does not appear in the drop-down search menu, but appears sure that they are already in the system, try these tricks:**

  i. Try spelling the name differently, or **search by address, date of birth, or Client ID number**. This will be helpful if the name was previously entered into the system incorrectly.

  ii. Ask client if they signed up within the past two weeks, in which case they will likely not be in the system yet. Let the client pass but inform that if they are not in the system by next week they may need to do the paperwork again.

  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.

- **If you notice that a client's name is spelled incorrectly in the system, please correct it or write a note for someone (Amber or Carolina) who can fix it later**.

| Search for Clients By... | 🔍 Client ID | 📅 Date of Birth | 👤 Name | 📍 Address | 📞 Phone |
|---|---|---|---|---|---|
| 👤 john doe | | | | | |
| Doe, John | | | | | 01-02-2015 |
| Doe, John | | | | | 07-01-1990 |
| Doe, John | | | | | 01-01-1990 |

3) If there are multiple clients listed under the same name, you can verify which is correct by inquiring about client's date of birth, which will also be listed in the drop-down.

4) If the client has already been registered in the system, you can click on their name from the drop-down menu and proceed to **check them in. [NOTE: PLEASE REVIEW QUICKCLICK PROCEDURE OUTLINED ON LAST PAGE.]**

- Once you have selected the client's name from the drop-down menu, you will be sent directly to the Service tab.
  - i. If you are sent instead to the Personal tab and asked to review a merged record, please review client address and number of household members, then click "Save & Next" at the bottom of this page and the next page before proceeding with check-in.
- After selecting their name from the drop-down, click the blue button that says "Partner Agency Pantry."



- Leave all names checked for the question about which household members are receiving services for the visit.
- **The visit is logged by clicking "Save" in the bottom right-hand corner of the page**. A green pop-up should 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:**

| 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 tab to check in a new client, a dialog box may appear asking if you are sure you want to leave the page. This likely means that you have forgotten a step in logging the visit. If you have already Saved the visit, choose "Leave." If not, choose "Stay."



Do you want to leave this site?

Changes you made may not be saved.

| Leave | Stay |
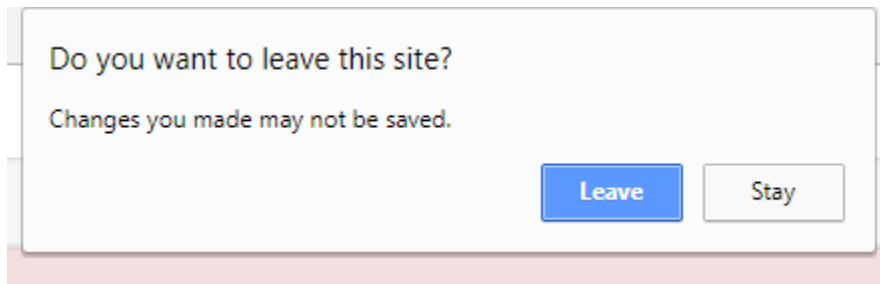
7) If client does not have an ID card, you can make one for them. Write in their name (make sure to spell correctly) and Client ID. Client ID is in the top right-hand corner of the Services tab.



⊙ PERSONAL    ⊙ MONTHLY INCOME    ⊙ SERVICES    ⊙ NOTES

Services
📂 See Client in View Mode

Flintstone, Fred  👤  19806  ▾

🏠 Household Summary    ⬚

| Household Size | 3 | No. Visits (last 30 days) | 21 | Eligible Programs ✔ TEFAP Mobile Pantry  ✔ TEFAP Partner Agency Pantry |
| Adults (18-59) | 2 | | | Dietary Considerations — |
| Seniors (60+) | 0 | | | |
| Children (0-17) | 1 | | | |
| Children's Ages | 9 | | | |

**New TEFAP Mobile Pantry**    **New TEFAP Partner Agency**    Last Profile Review

8) Check-in is complete!

**QUICK CLICK INSTRUCTIONS**

An easier way to check clients in is to use the Quick Click feature. However, using Quick Click does not allow you to easily review a client's recent visits, so do not use this feature if you are limiting client visits to your site.

1) Begin by locating the green Quick Click banner above the client search bar, and shift the button in the right-hand corner to "On."



2) Then shift the button labeled "Partner Agency Pantry" to "On."



3) Search for clients in the same process listed on pg. 1, then click on the correct client's name in the drop-down.
   a. Make sure to **click** on the client's name. **Do not press enter.**

4) You will receive the following pop-up informing you that the client's visit has been registered. To check-in the next client, simply close the box.