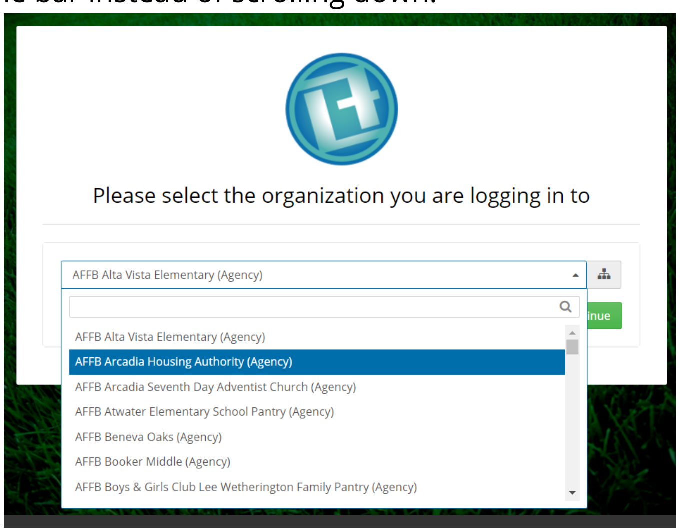
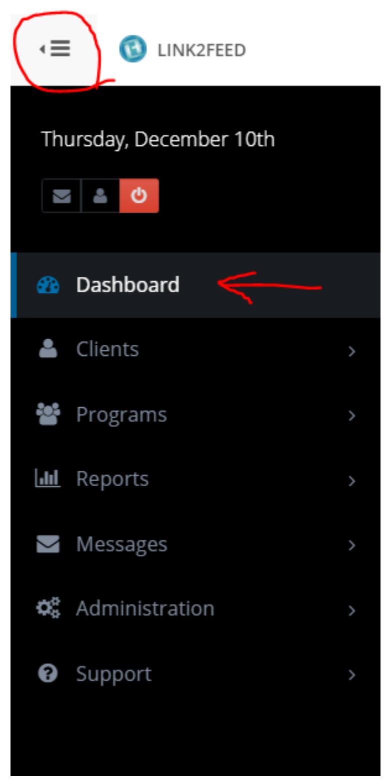
Link2Feed New Client Registration Quick Guide (non-TEFAP)

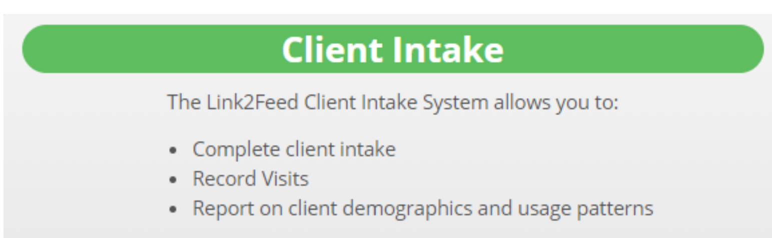
Please call Erin EverGreen at 941.379.6333 x143 if you need help.

1) Log in to Link2Feed.
   - Open either Chrome, Firefox, or Safari (if Mac user) browser (**Internet Explorer will not work!)**
   - Type **portal.link2feed.com** into the address bar
   - Log in using the predefined volunteer account.
      i. You don't need to log in with your email address.
      ii. All tablets have been programmed with usernames
      iii. Log in using the predefined volunteer account and password.
      iv. Please just click the email field to log in.

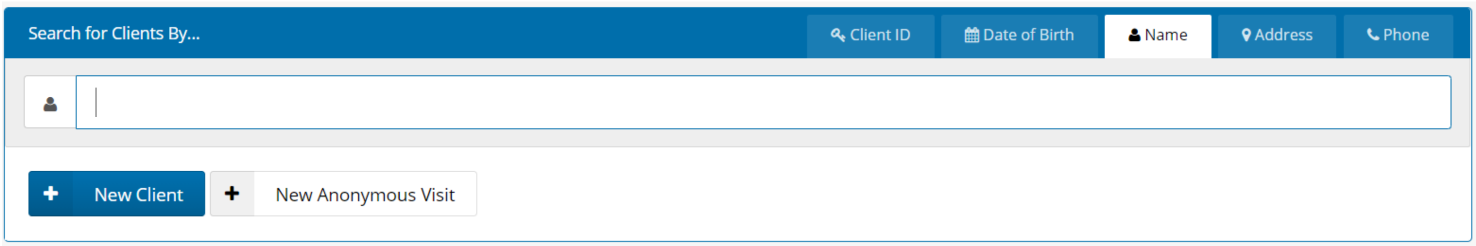
2) Select organization from the dropdown; you can type the name of the organization in the bar instead of scrolling down.







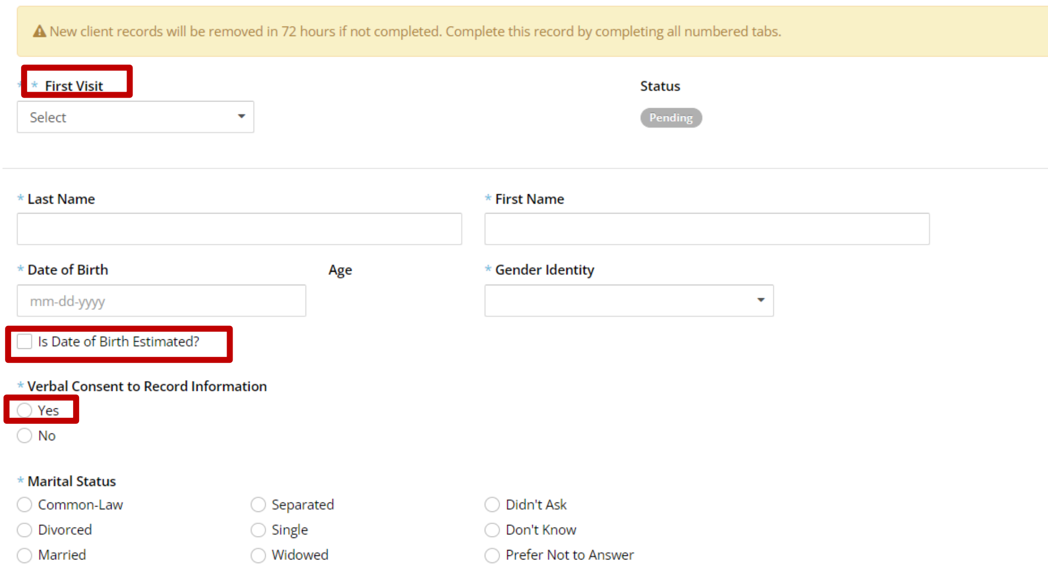
3) Access New Client registry by clicking “Client Intake”, then Dashboard.



→ Before creating a new client, **make sure to first search** for the client by using the **search bar** directly above the New Client button to avoid creating duplicates.

- Try searching by first name, then last. You can also search by partial words. (i.e., if the client’s name is Buffy Williams, type in “buf wil”)
- Or search by date of birth in the following format: mm/dd/yyyy.

4) If the client you are looking for does not come up, click “+ New Client” underneath the search bar.
5) Choose “Specific Date” and enter the date of the pantry where the client attended.
    - If you are registering a client on the same day as the pantry, use “Today**”** option from drop-down for "First Visit”.
6) Then enter client name, date of birth, gender, and marital status.
    - Always click "Yes” for “Verbal Consent to Record Information”.
7) Always click “Yes” for “Verbal Consent to Record Information.”
8) Enter Date of Birth (DOB).
    - If client DOB is unspecified, type in “01/01/[estimated year],” and select the “Is Date of Birth Estimated?” box beneath.



⚠ New client records will be removed in 72 hours if not completed. Complete this record by completing all numbered tabs.

* First Visit
Select

Status
Pending

* Last Name
* First Name

* Date of Birth
mm-dd-yyyy
Age
* Gender Identity

Is Date of Birth Estimated?

* Verbal Consent to Record Information
Yes
No

* Marital Status
Common-Law
Divorced
Married
Separated
Single
Widowed
Didn't Ask
Don't Know
Prefer Not to Answer

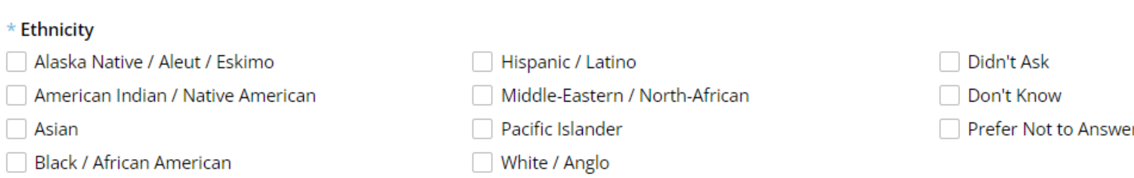
9) Enter address as listed.
   - Once you begin entering the address, suggested addresses will appear in a drop-down. If you can find the correct address from the drop-down list, go ahead click on it. You will see that the information fields for address are automatically populated*. Occasionally you may need to manually enter information for an address the database cannot locate.

   *When the database automatically populates an address, it sometimes inputs incorrect city names (e.g., "North Sarasota", "Kensington Park" as opposed to "Sarasota").
     - If no address is listed, check the box underneath the address field that says

No Fixed Address
Prefer Not to Answer

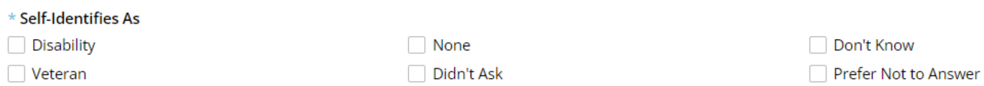
10) Ignore fields for "Email Address" and "Phone Number".

11) Complete "Referred By" and "Ethnicity" sections as listed.
     - For "Ethnicity", you can select as many options as applicable.

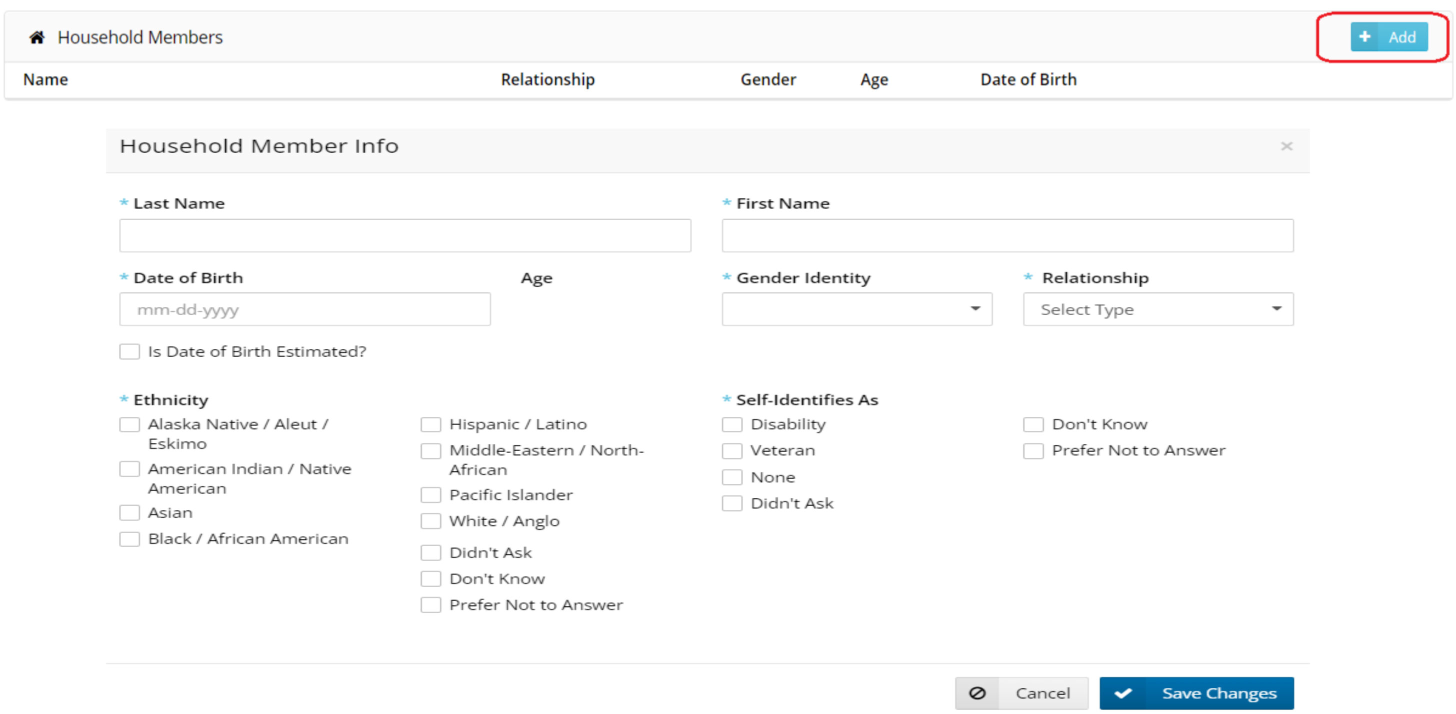


* Ethnicity
Alaska Native / Aleut / Eskimo
American Indian / Native American
Asian
Black / African American
Hispanic / Latino
Middle-Eastern / North-African
Pacific Islander
White / Anglo
Didn't Ask
Don't Know
Prefer Not to Answer

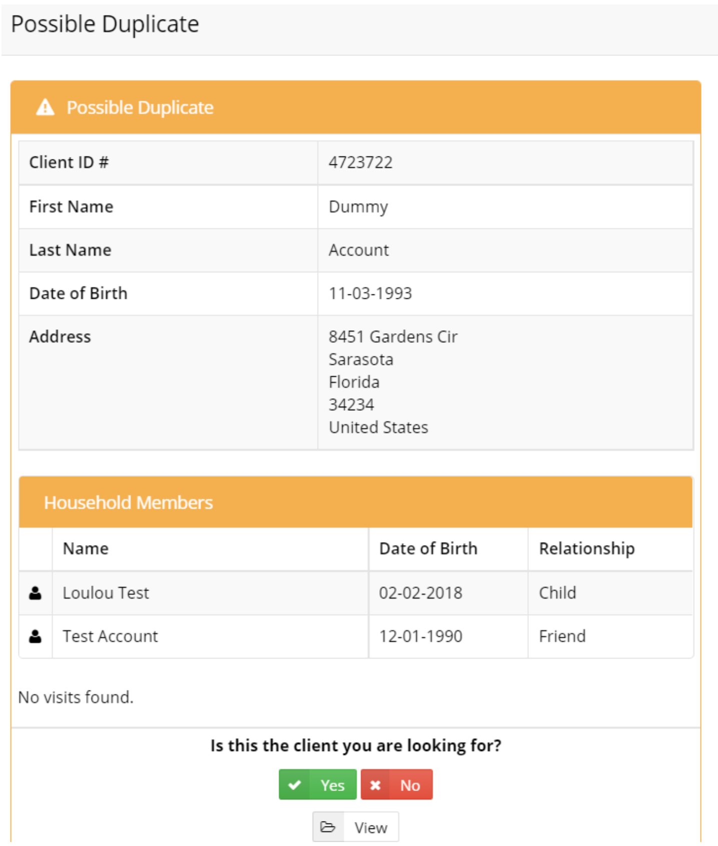
12) “Self-Identifies as” section should only be used to note whether the client is a **“Veteran " or has any disability.** If the client is not a Veteran or is not disabled, select “None.”.

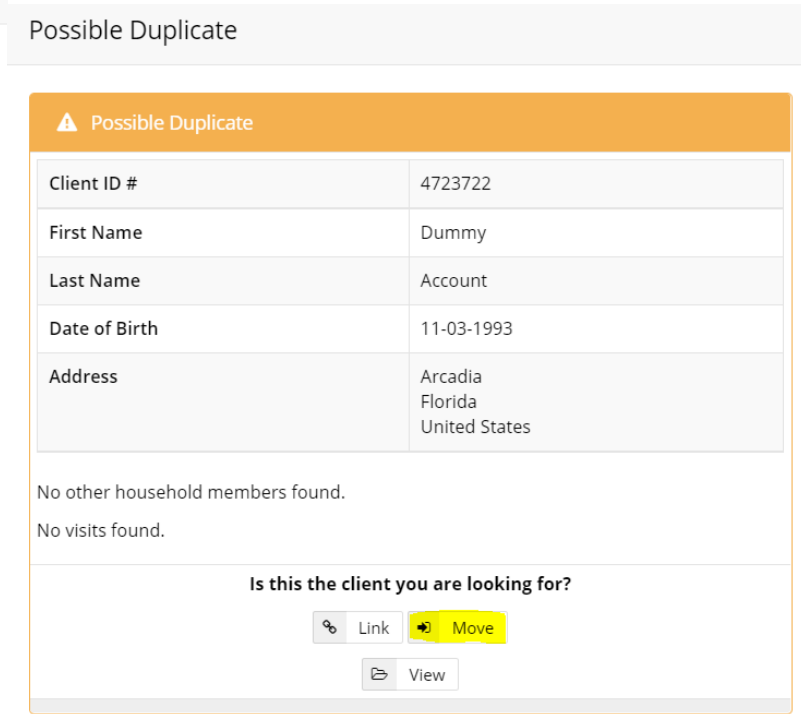


13) **Before moving on to the next page**, add other household members one at a time using the blue “+ Add” button at the bottom of the first page.



- If you are doing paper registration, additional household member information is located on the back of the registration form.
- A pop-up will appear requiring more details.

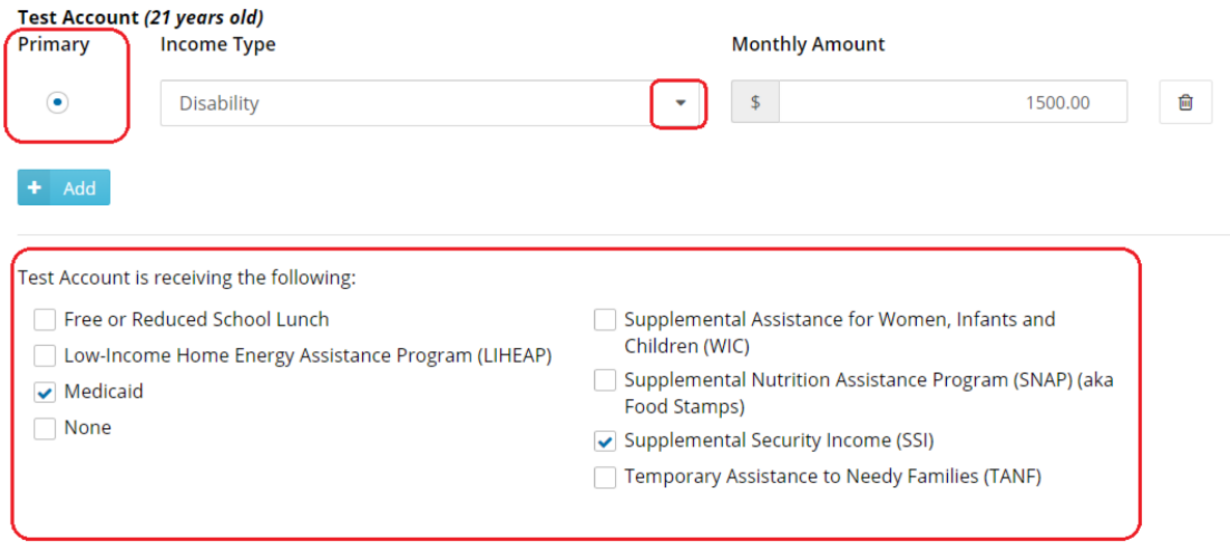




- If the additional household member already exists in the database, you will receive an alert stating that a "Possible Duplicate" has been found. Click to view the profile.
    i. If multiple names show up, you will need to review each possible duplicate.
- If the client information matches, click "Yes" to select the client and click "Move" to add client to the household.
- If the information does not match, click "No" and it will dismiss and close out the client profile.

14) Click Save & Next.
- If you missed any required fields, you will be required to complete them before moving forward.

15) Complete income information and check applicable services for **each household member**.

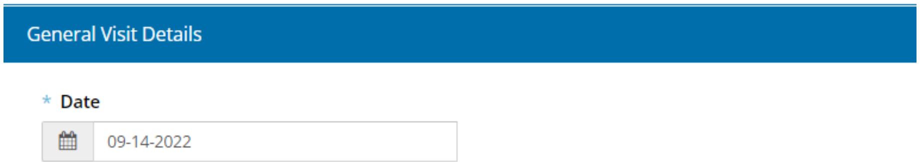


- Click "Add" under the household member's name to add a source of income. Then select "Income Type" from the drop-down.
- Add monthly amount received after tax.
- Whichever income source is **the highest** should be designated "**Primary**." You can select **only one income source as the "Primary."**
- Check if household members receive any of the listed benefits. Please make sure to select "None" to indicate no benefits are received.

16) Click "Save & Next" at the bottom of page.
The final tab is the "**Services**" page **where you should record a visit for the client whose intake you have just completed.**

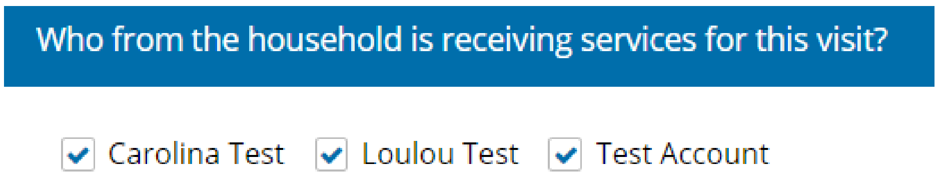
- Beneath the "Household Summary", you will find one or more blue boxes with pantry names. Click the name of the corresponding pantry.

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



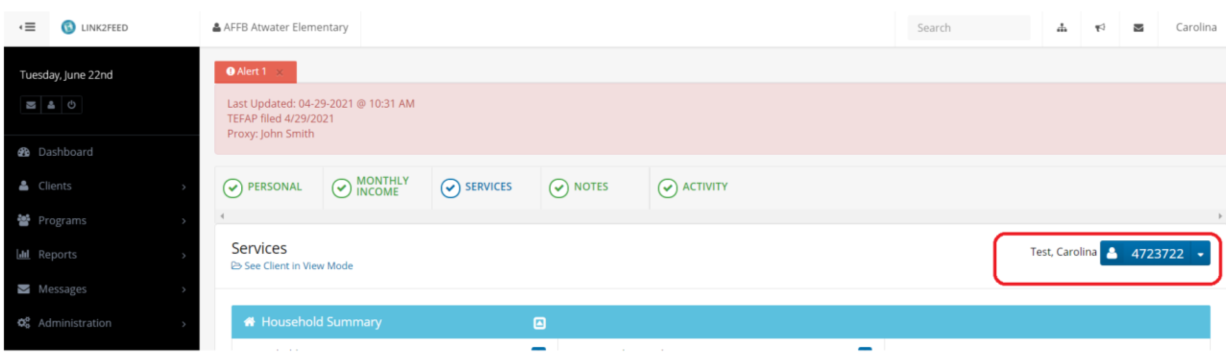
- **If backdating a visit entry,** under "General Visit Details", adjust the date to match the date the client visited the pantry.

- Always leave all names checked for household members receiving service for the visit.

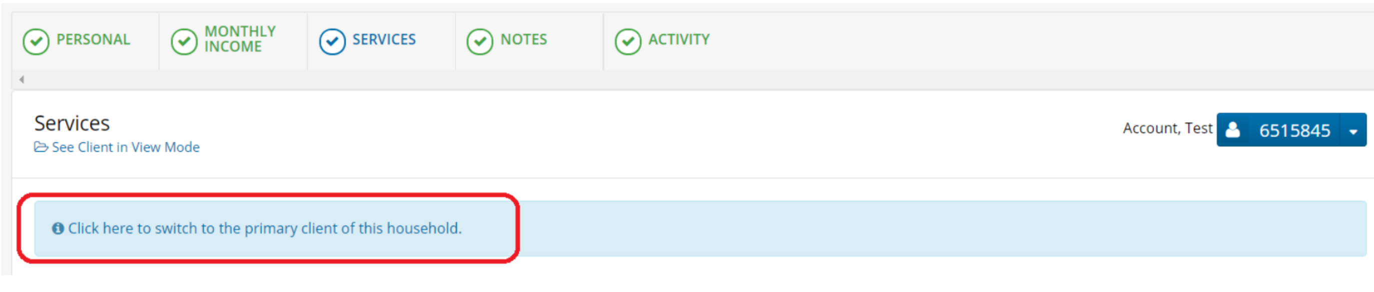


17) Click 'Save" at the very bottom of the page to log the visit.
    - At the bottom of the "Services" page, you will see a list of previously recorded visits, in case you need to double-check whether you already recorded one.

18) Issue a client card* on the spot if you are doing live registration. Client name and ID number can be found in the upper right corner of the profile.



*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."

19) Registration is complete!