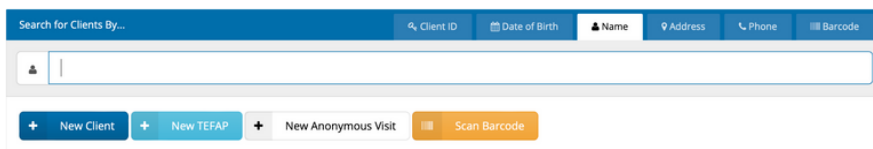


How to Record a TEFAP Visit - Intake Staff

1



Search for Clients By... Client ID Date of Birth Name Address Phone Barcode

+ New Client + New TEFAP + New Anonymous Visit Scan Barcode

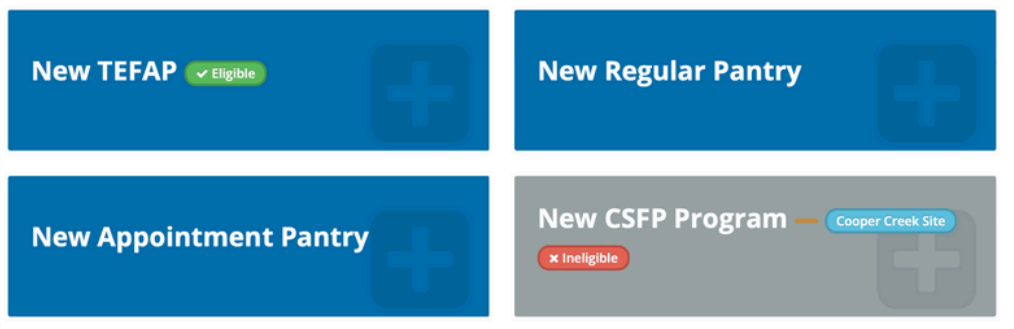
In the Dashboard, use the search bar to search for your client. You can search using the following characteristics of ANY individual within a household: First & last name, date of birth, client ID #, address or phone number.

2



You will be directed to the clients profile where you will find the Client tabs run across the top of the screen! You'll be guided to fill out all required information here if anything is missing.

Select tab Service once all the other tabs are complete, and scroll to the center of the page to **select the TEFAP Program button** to begin intake. **Select Save on the bottom right once required information is filled in.** It's that simple!



New TEFAP ✓ Eligible

New Regular Pantry

New Appointment Pantry

New CSFP Program — Cooper Creek Site
✗ Ineligible



If a client does not meet the eligibility requirements, the TEFAP program will be greyed out.

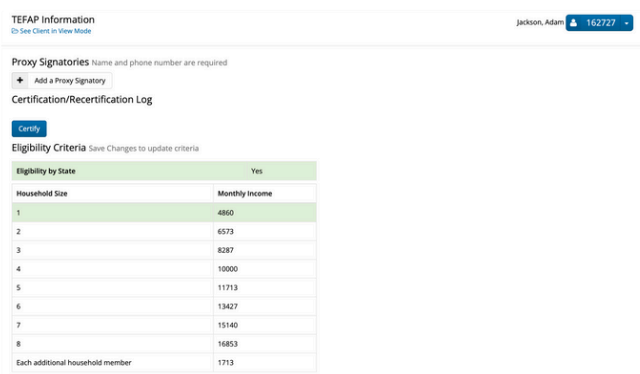
Certifying Eligibility



Some states require clients to certify eligibility before service.

To certify a client **click** the dark blue **Certify** button; this will open up the Certify canvas with a **Client eSignature** disclaimer. Capture the client's certification using one of the drop-down Signature Types, then scroll to the bottom of the page and **click Save**.

Or if the TEFAP Tab is not visible, a message will pop up before intake.



TEFAP Information
To See Client in View Mode

Proxy Signatories Name and phone number are required
+ Add a Proxy Signatory

Certification/Recertification Log

Certify

Eligibility Criteria Save Changes to update criteria

Eligibility by State	Yes
Household Size	Monthly Income
1	4860
2	6573
3	8287
4	10000
5	11713
6	13427
7	15140
8	16853
Each additional household member	1713

Recertification (If Required)

To recertify a client, click the dark blue **Recertify** button; this will open up the Recertify canvas with a **Client eSignature** disclaimer. Capture the client's recertification using one of the drop-down **Signature Types**, then scroll to the bottom of the page and click **Save**.



Recertify



Have additional inquiries?

Ask the chat bot, just click the Link2Feed logo on the bottom right corner of the screen.

For other questions, please reach out to your manager for further assistance!