How to Record a TEFAP Visit - Intake Staff

Link2Feed

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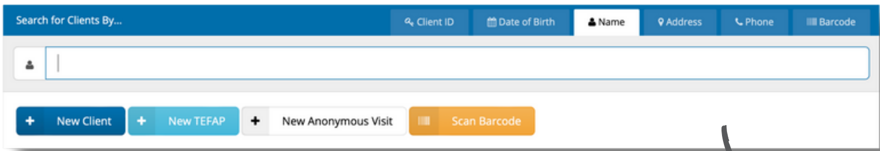

In the Dashboard, use the search bar to search for your client. You can search using the following characteristics of ANY individual within a household: First & last name, date of birth, client ID #, address or phone number.

Select the client, and view their **Service tab**, and Select the **TEFAP Visit** button within the center of the screen,

You can also create a new client by clicking the + Add New TEFAP button under the search bar!

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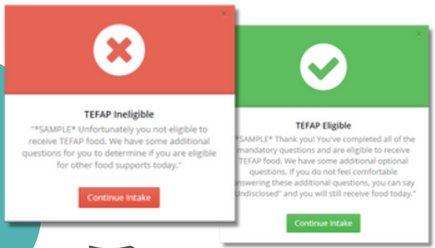
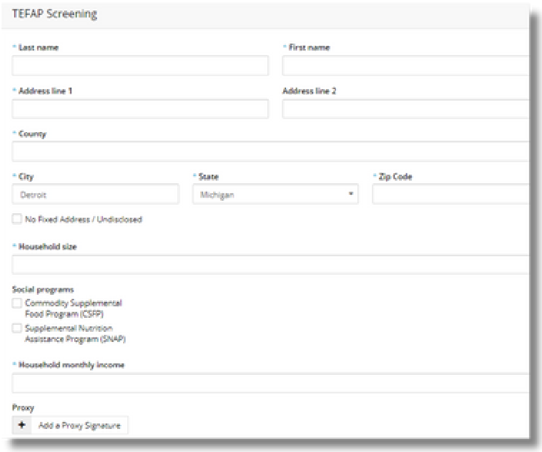
You will be led to a screening page before the intake process begins. The system will tell you if, based on the household income and/or social programs if the client is eligible for the program or not.

If a client does not meet the eligibility requirements, the fields on the TEFAP tab will be greyed out and the status will be automatically set to "Denied" or "None".





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If eligible, 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.

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

To see who picked up TEFAP on a particular visit day, click on the blue Folder icon to open up the details of the visit; scroll to the bottom to see who signed for the visit.

Certification/Recertification (If Required)

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**.

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.**

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!