How to Manage CSFP Clients - Intake Staff

Link2Feed

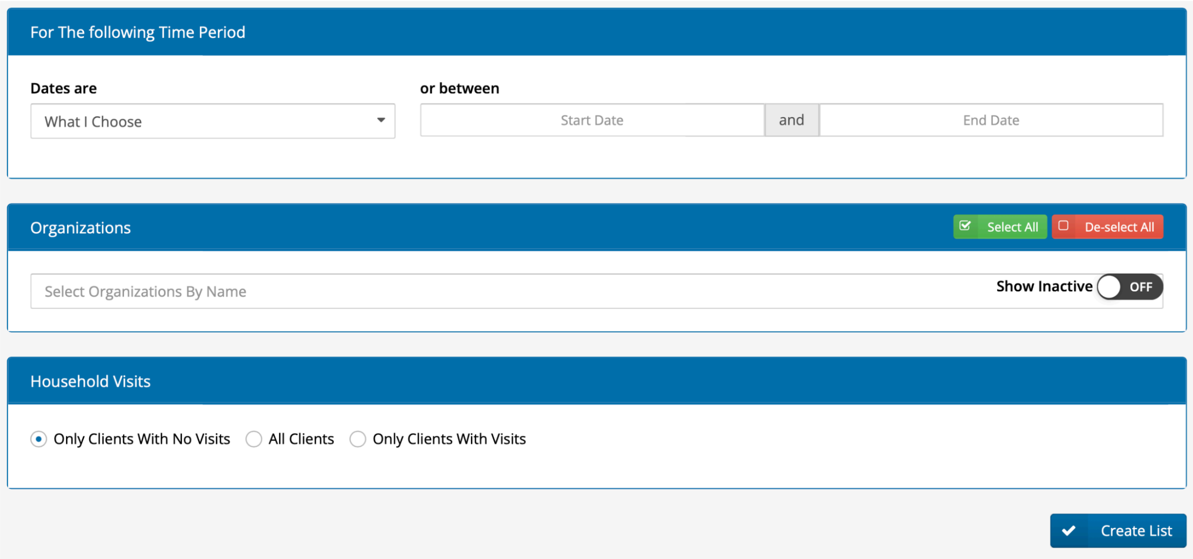
A CSFP Kit Issuance list creates a more detailed list of the client's CSFP ID, Status, Proxy, Kit Size, Last Visit Date and Location, along with the client's contact information.

Access the CSFP Kit Issuance list on the "Clients" heading in the left-hand menu panel. Then click on "CSFP Kit Issuance".

1 Enter Reporting Dates

Enter the dates for the reporting period by clicking on "Start Date" and then enter the "End Date". **Select the organization(s)** you want to report on.

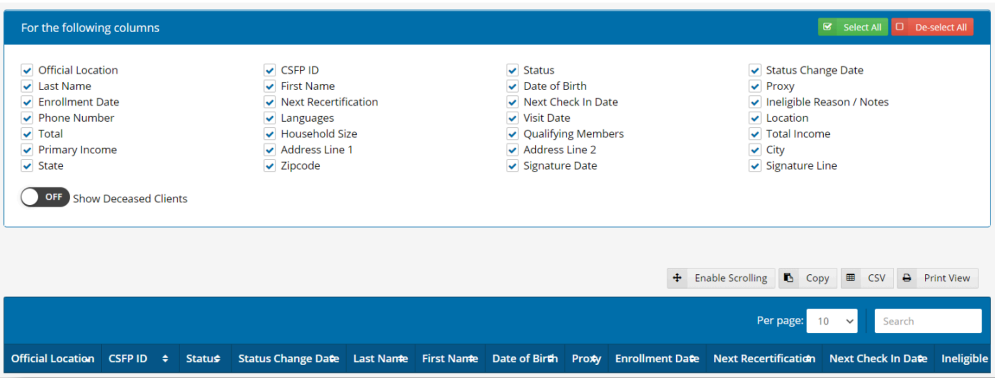
The date range also affects the "Last Visit Date" and "Location" columns in the Kit Issuance List. These columns will only include data if the client had a visit during the selected date range.



2 Select your filter

- **Only Clients With No Visits:** Clients who have not visited between the chosen dates.
- **All Clients:** All CSFP registered clients.
- **Only Clients With Visits:** Clients who have visited between the chosen dates

To pull the list click the "Create List" button.



3 Customize Columns

A list of column options will be shown. Default options will be checked, but you can **check additional sections or uncheck existing ones.**

Create a CSV download or Print View to view or filter through client data

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!