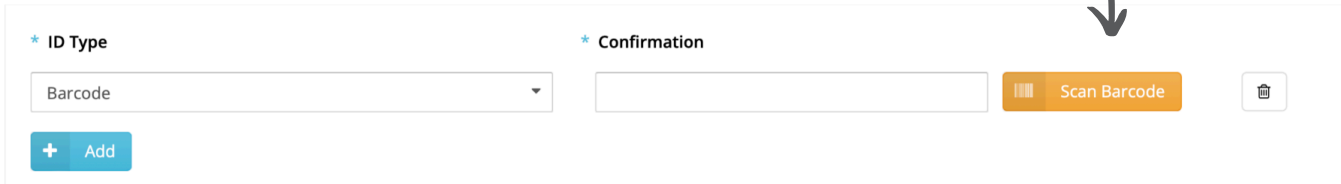


How to Set Up & Use Barcode Scanning - Intake Staff

How to Add a barcode to a Client

Within the **Personal tab** of a client's profile, **find the ID Type field** and select the Barcode ID type.

Click the orange “Scan Barcode” button to enable the camera feature on your device. From there, scan a new barcode to activate it and attach it to the client’s profile. Once entered, save your changes!



The screenshot shows a form with two main sections: "ID Type" and "Confirmation". The "ID Type" section has a dropdown menu currently set to "Barcode" and a blue "+ Add" button below it. The "Confirmation" section has an empty text input field. To the right of the "Confirmation" field is an orange "Scan Barcode" button with a barcode icon, and further right is a trash can icon. A curved arrow points from the text above to the "Scan Barcode" button.

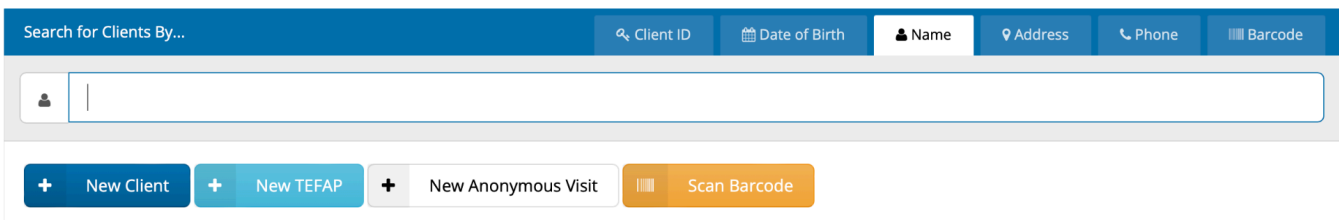
- If using a scanner, scan the barcode. The numbers will automatically be entered into that field.
- If using a camera, you can also manually enter the numbers.



How do I record a Visit using Barcode Scanning

Select the **Barcode** search option with the “Search for Client’s By...” bar within the dashboard.

- **If you are using a Barcode Scanner:** Place the mouse in the text box, then scan the client's barcode, and you will be brought directly to their profile.



The screenshot shows the top of a dashboard with a search bar labeled "Search for Clients By...". Below the search bar are several tabs: "Client ID", "Date of Birth", "Name", "Address", "Phone", and "Barcode". The "Barcode" tab is selected. Below the tabs is a large text input field. At the bottom of the dashboard are four buttons: "New Client", "New TEFAP", "New Anonymous Visit", and "Scan Barcode".

- **If you are using a Camera Scanner:** Click on Scan Barcode. This will turn on your device camera. Hold the barcode in front of the camera to complete the scan.



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!