LINK2FEED

User Manual

FEBRUARY 10, 2021

GOLDEN HARVEST FOOD BANK

feeding lives together

Contents

How Do I Log In?

Web Browsers

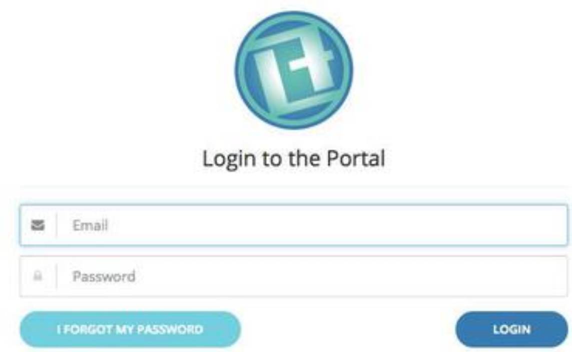
Link2Feed is only compatible with Google Chrome, Mozilla Firefox, or Apple Safari internet browsers. Link2Feed is NOT compatible with Internet Explorer. DO NOT use Internet Explorer to log into Link2Feed.

For testing purposes, please go to: https://test-accounts.link2feed.com

DO NOT enter any test clients into the actual database.

To enter clients into database:

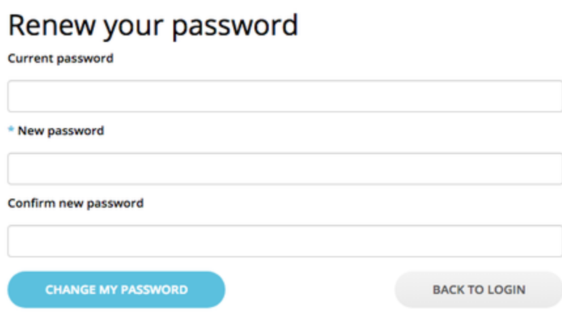
1. Go to: http://portal.link2feed.com
2. You will see a login page displayed on your screen (like below).
3. Enter your email address and password in the spaces provided by your organization.
4. Click on the "Login" button to proceed.



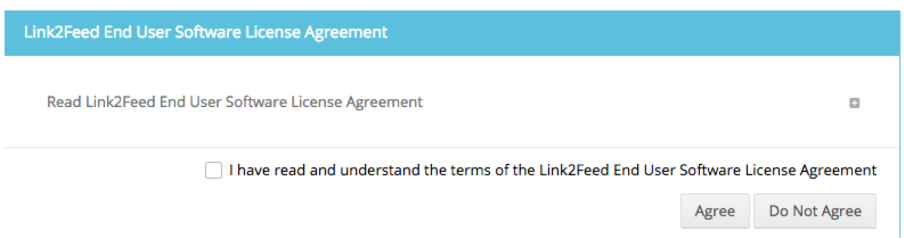
Select Organization

Changing your password on first log in

1. Login to Link2Feed (see above directions)
2. You will then be asked to change your password.
    - Enter that same password again in the "Current password" text box.
    - Type in your new password in the "New password" text box.
    - Re-type your new password in the "Confirm new password" text box.
    - Click "Change password" to save your changes.



3. After logging in, you will be prompted to agree to a disclaimer.



Check off the check box and click on the "Agree" button.

What Are My Password Requirements?

Your password:

- must include at least 8 characters
- must include both upper and lower case letters
- must include at least one number
- must include at least one special character

The better the phrase the stronger it is.

- "houseflies" is weak
- "Hou$eFlies" is stronger
- "Hou$eFlies395" is very strong

Expired Password

Your password will expire every six months and will need to be reset.

The same requirements above apply, but you cannot use the same previous password.

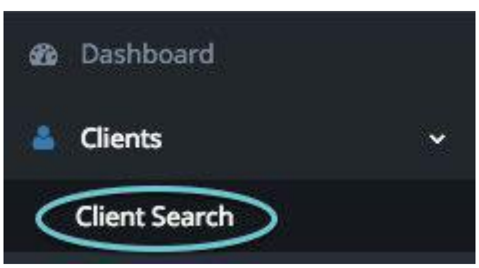
What is a CSRF Token?

If you leave the Link2Feed login page open on your computer for a certain period of time, you may notice that you have to log in twice. The first error says "CSRF Token".

How Do I Add a New Client?

If you are creating a new client and don't complete all of the fields (up to the "Services" page) within 72 hours of the profile's creation, the client's profile will be removed from the system. A notification appears each time a user is adding a new client to remind them of this.

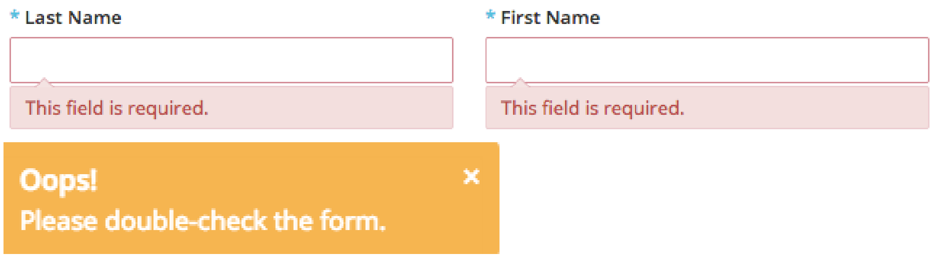
Step-by-Step Guide

1. 

   Click on the "Clients" heading. Click on "Client Search".
2. To add a new client, click on the "Add New Client" button under the search bar.

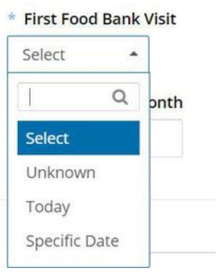

Fill in the fields under each of the tabs listed in the profile.

Required fields are starred with blue asterisks. If a required field is left blank when attempting to proceed to the next category, you will be prompted to fill in the required information.



Personal Information

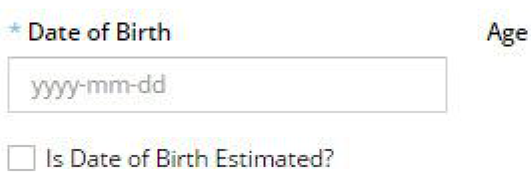
This page allows you to collect personal information about all individuals within the household. This includes, but is not limited to, first and last names, date of birth and residential information.



You will be prompted to select the month and year of the first food bank visit.

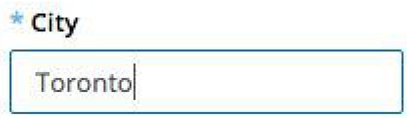
While we still have use of the old database, the EFP receptionist will provide the date of the client's first visit to you to enter. This information will be written in the top center of the USDA form. If the client is new to the food bank, the first visit date will be today. We will not use the "Unknown" option. Once we lose access to the old database, we will use the estimation feature.

A client's "Status" will be set to inactive if they have not visited the food bank in six months. If they are to return, their status will be set back to active after a visit has been recorded.



By entering the date of birth, the age will automatically calculate. Date of Birth is not an optional category for our pantry. Do not estimate the Date of Birth. DOB will be in MM-DD-YYYY.

When entering the address, put the unit and suite numbers on "Line 2".

- 

- When typing in a name of the city, suggestions will come up based on the cities you already have in your list and auto complete the name for you.
- If the city you have typed in is not listed, the system will still accept what you have typed. Please double check this section to make sure you have spelled the city correctly if it is not in the pre-populated list.

- Click on the "Add" button to add email addresses and phone numbers of the client.
- The drop-down list on the right allows you to choose the category.
- The red "X" icon allows you to delete the item.
- The radio button to the left allows you to choose the primary method of contact.

Primary Option

Both the phone and email options automatically choose the first entry if there is only one entered. So, for example, if one phone number and one email address were entered without clicking on the "primary" option, it would allow the user to continue. This is saved in the back end.

Drop Down List

If you have a drop-down list with several options, you can use the search bar at the top of the list to type in the first few letters of the word(s) you're looking for. This will narrow down your options and help you to sooner find the list item.

To record languages spoken by this client, start typing in the name of the language and your options will appear automatically. Click on "Enter" on your keyboard or select the language with your mouse to select it.

When reporting on languages, it is done by client and not by household. So if Mr. Smith's profile says he speaks English, Mrs. Smith's profile could have another language listed. You would have to add that language to her profile.

- Click on the "Add" button to add information about other members in the household.

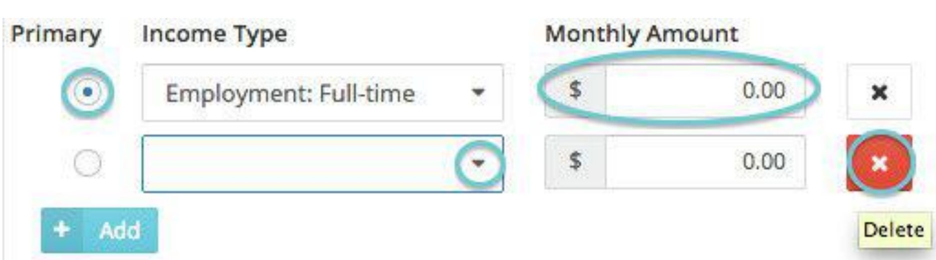
A notification will show at the top right of the screen indicating that your changes are being saved (whether you clicked the "Save" or "Next" button). The notification will turn green when your changes have been successfully saved.

Profile Information

Monthly Income

This page requires you to collect income information about the adults in the household.

- Check off the checkbox beside "Show all household members" to collect income information on all individuals within the household.



- Click on the "Add" 

button to add an income source.
- Choose the income source from the drop-down list.
- Add as many sources that apply.
- You must select the radio button beside ONE income type that the household considers to be the primary income source
- Supplemental Security Income (SSI) will no longer be counted under income. It is only considered an automatic qualifier for USDA.

If you select an Income Type of "No Income", you won't be able to enter a monthly amount or add any other income types for this individual.

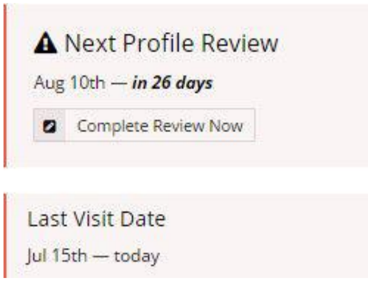
- The system will automatically add up the total income amounts of each individual.
- Use the radio button to the left of the income source to choose which type is the main primary source for that individual.
- We are not collecting Expense information

Dietary Considerations

Check off any dietary considerations that the individuals of the household feel should be known and noted in their profile but please let the client know that their package might still contain these foods.

Services

This page provides you with a summary of the household's information. This is the page used to add a visit.



The Personal and Services page will always indicate when the client's next profile review is scheduled for and their last recorded visit date.

Search

The "Search" text box can be used to filter visits on the client's Services page. For example, you can search for visits when particular programs were accessed or particular provisions were provided. Type in part of the program or food/item provided in the search box to filter your results.

You can also see a list of the client's previous visits and its details

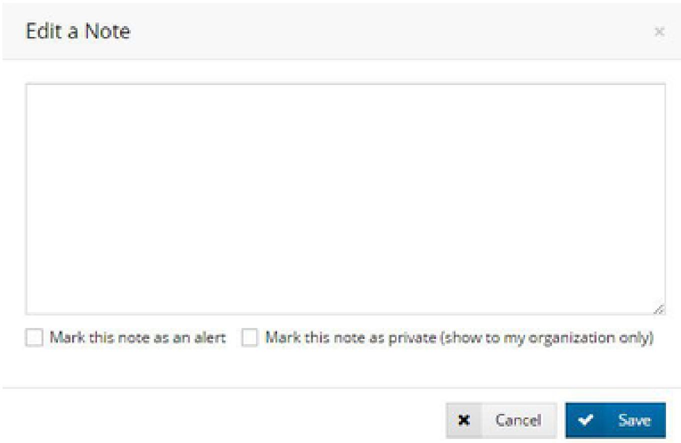
- Visit Date: the date of the visit
- Program: they type of service accessed
- Location: the location of the visit
- Click on the "View" (folder)  icon to see details on a particular visit

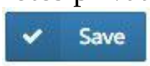
Notes

This page allows you to add a new note to the household's profile.

- Click on the "Add a Note" 

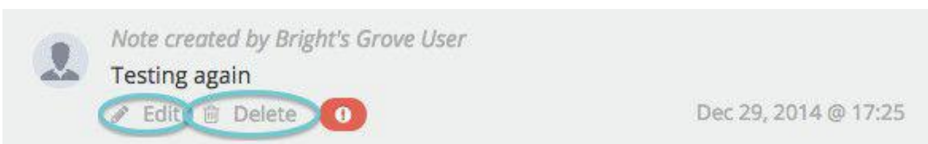
 button to create a new note.



- Type your note.
- Check off the checkbox beside "Mark this note as an alert" to set the note as urgent. This will display the note on the top of each page of the client's profile.
- Please do not make notes private.
- Click on the "Save" 

 button to save changes or "Cancel" 

 to discard the changes.



On the Notes page:

- Information will show indicating who wrote the note and when
- Edit: allows you to edit the note, including the text and alert status
- Delete: allows you to delete the note
- the "!" notification  shows that the note has an alert status
- Any notes entered by a user within your distribution network can now be edited or deleted by any other user within your distribution network.

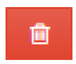
Notes

The "Notes" feature can also be found at the bottom of the page when adding a visit. You can add a note and set it as an alert status in the same way as a regular note. These notes will appear on the Notes page.

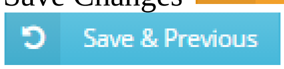
Intake for Existing Client

1. Search for the client
2. Starting with the Personal information tab, use the tabs along the top to switch between headings of your client's profile. Please make sure to go through each tab to verify information.
3. Update information (see more instructions below)

4. Click on the "Edit"  icon to edit a household member's information.

5. Click on the "trash"  icon to remove a household member or income type.

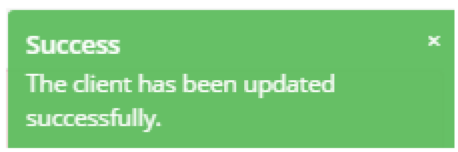
6. Click on the "Save Changes" 

button to save your changes. Click on the "Save & Previous" 

to go to the previous page or the "Save & Next" 

button to move on to the next page.

7. Notifications will appear to let you know when your changes are saving and have been successfully saved.



Forced Review

Link2Feed has a "Forced Review" feature that is defaulted to force users to review client profiles. Ours is set for once per year.

Services

1. Click on the "Services" 

page within your client's profile.
2. Click on the "New Visit Food Bank" (Our Button will say USDA and Donated) 

button to add a visit.

- **Date:** automatically set to the current date. This can be changed manually if the pick up or delivery date has passed.

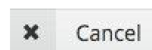
Tips

You can find blue question marks at the top of certain sections. Clicking on it will provide more information on how to complete the area you are filling out.

Signatures

We will be using a hard copy signature option until the electronic option is approved. If the client is receiving USDA, Please collect the appropriate COMPLETED DSS Form 16112 and have the client sign the TEFAP log on the desk. The client must fill out the form except the optional data section. Complete pick up slip and send client back to waiting room.

Click on the "Save" 

button to save changes or "Cancel" 

to discard the changes.