Link2Feed Data Entry Cheat Sheet

1) Access New Client registry by clicking Client Intake, then Dashboard. Then:
   • Before entering a new client, make sure to first search for them as an existing client by using the search bar directly above the New Client button, in order to avoid creating duplicates.
     i. Try searching first name, then last. You can also search for partial words.
   • If client is not already registered, click New Client.
   • If client is a duplicate but you have concerns about the accuracy of the information, simply add them again as a new client and choose no/dismiss any messages asking whether the client is a duplicate.

2) Click New Client underneath the Search Bar. Choose “Specific Date” and enter the date of the pantry where the client collected. Then enter client name, date of birth, gender, and marital status.
   • If entering data live or on the same day of the pantry, use Today option from drop-down for First Food Bank Visit section.

3) Always click Yes for verbal consent to record information. Click No for Written Consent.

4) Enter address as listed.
   • Once you begin entering the address, suggestions will appear in a drop-down. If you can find the correct address in the list, all other address information will be automatically generated. Occasionally you may need to manually enter information for an address the system cannot locate.
   • If no address is listed, check the box underneath the address field that says, “No fixed address/undisclosed.”

5) Ignore fields for Email Address/Phone Number.

6) Complete Referred By and Ethnicity sections as listed.
   • Can check as many options for Ethnicity as apply.
• “Current Client” in the Referred By section applies to a client that has been coming to your pantry for awhile, but has not yet been entered into Link2Feed.

7) “Self-Identifies As” section should only be used to note whether or not the client is a veteran. If paper registration states Yes, click “Veteran” in Self-Identifies Box. If paper states “No,” click “None.” Disregard all other choices.

8) Before moving on to the next page, add other household members one at a time using the blue “Add” button at the bottom of the first page.
   • Additional household member information is located on the back of the page and/or other “additionals” forms that will be stapled on. (They are organized for ease of use for clients during the intake process, but when inputting data you will need to refer back and forth across multiple pages, as demographics and income sections are separated in Link2Feed.)
   • A pop-up will appear requiring a limited number of demographic details, including the “self-identifies” sections again.
     i. If the DOB calendar blocks the sections underneath it, click inside the field and press “Tab.”
   • If the additional household member already exists in the system, you will receive an alert stating that a possible duplicate has been found. Click ignore – duplicates will be reviewed by AFFB staff later.

9) Click Save & Next.
   • If you missed any required fields, you will be required to complete them before moving forward.

10) Complete income information and check applicable services for EACH HOUSEHOLD MEMBER.
   • You may need to go out of order again to locate income information for different household members.
• Click Add under the household member’s name to add a source of income. Then add income type and monthly amount received. **If none, choose No Income. Do not leave any adult’s income section blank.**
• Whichever income source is highest should be designated “Primary.”
• Check if clients are receiving listed services or resources. If not, choose “None.”
• **Never write “0.00” for an income estimation, even if no amount is listed (unless client’s income type is “No Income.”)** **If client’s income type is listed without a specific amount, we use the following estimations:**
  
  i. Disability: $733.00
  ii. Part Time Employment: $499.00
  iii. Full Time Employment: $999.00
  iv. Social Security: $999.00

11) Click Save & Next. The final tab is the Services page, **where you should register a visit for the client whose intake you have completed.**
• Beneath the Household Summary, you will find one or more blue boxes with program names. Click the box with the name of the program that the client is eligible for (either “New Partner Agency Pantry” for non-USDA clients, or “New TEFAP Partner Agency Pantry” for clients who have filled out the TEFAP eligibility form.)
  
  i. At the bottom of the Services page, you can see a list of previously recorded visits, in case you need to double-check whether you already recorded one.
• Under General Visit Details, **adjust the date to match the date the client registered.**
  
  ![General Visit Details](image)
  
  * Date
  
  [2018-01-19]

• Leave all names checked for the question about household members receiving services for the visit.

12) Click Save to log the visit. Registration is complete!