

LINK2FEED INSTRUCTION AID

TOPIC: (10) Client CSFP Certification

PURPOSE

This instruction aid covers CSFP Certification after adding a New CSFP client or during a Service Visit for an existing client.

AUDIENCE

Agency employees and volunteers who perform client intake for a food pantry or who enter client data as part of Link2Feed implementation

PREREQUISITES

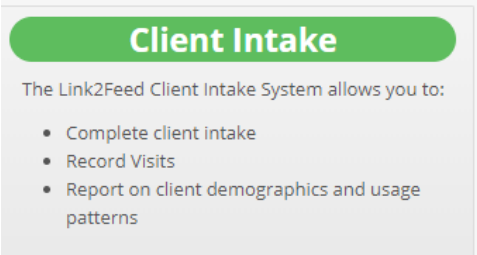
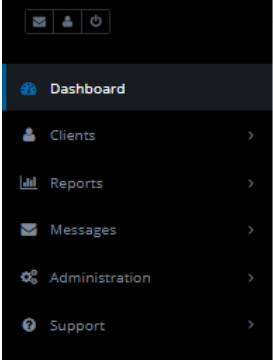

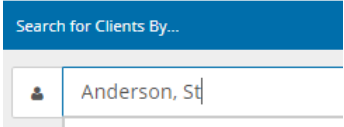
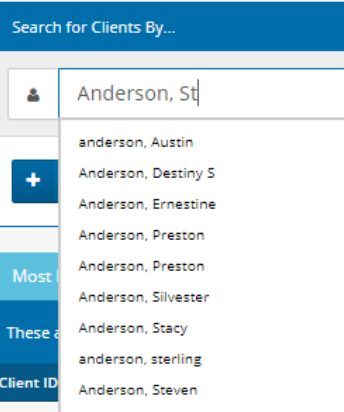
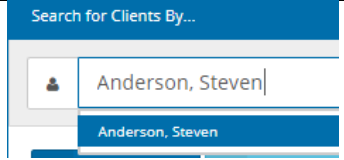
- (1) Log In & Password Reset
- (7A) New Client Entry-New TEFAP
- OR
- (7B) New Client Entry-New Pantry

INSTRUCTION STEPS

1. Dashboard: search, identify and select client record
2. CSFP: Complete CSFP Certification
3. CSFP: select the client eSignature type
4. CSFP: obtain the client eSignature
5. CSFP: save the record
6. CSFP: Review Certification Log

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1. Search, identify and select client record	
<p>a. If you have just logged in, Select Client Intake from Select an Application</p>	
<p>b. Select Dashboard from the side menu</p>	
<p>c. Select Name as the Search criteria from "Search for Clients By..."</p>	
<p>d. Enter client Last Name followed by First Name</p>	
<p>HINT: Watch for client records to be presented in a list as you type the last Name and First Name. The desired client record MAY appear before you finish typing</p>	
<p>e. Select the desired client record from the list (highlighted in blue) and click on it</p>	

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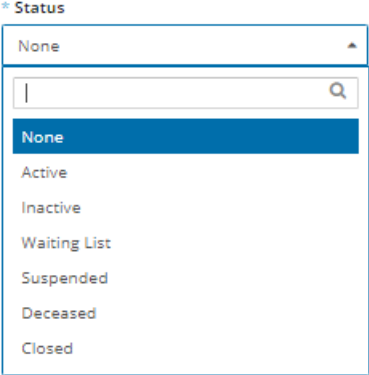
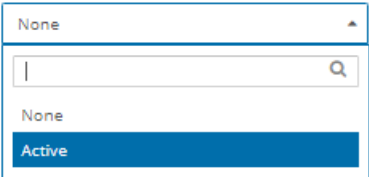


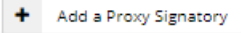
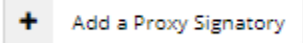


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<p>HINT: There may be multiple client records with the same name. Use Date of Birth to select the desired client record</p>	
<p>HINT: The client record may have a different first name or last name in the system than the first and last name provided by the client.</p> <p>Select Date of Birth as the Search criteria from "Search for Clients By..."</p>	
<p>f. Select the desired client record from the list (highlighted in blue) and click on it</p>	
<p>g. Check if there is an Alert (at the top of the screen) and review the associated client note</p>	

<h3>2. Complete CSFP Certification</h3>	
<p>a. Click on CSFP tab at top of page</p>	
<p>b. CSFP Client Info screen will appear</p>	
<p>c. Enter the Client ID in the CSFP ID field</p>	
<p>HINT: Client ID appears in the blue box to the right of the Client Last Name, First Name</p>	
<p>d. The Location will default to the Agency you selected at login.</p>	

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<p>e. Select Status “Active” or “Waiting List” from the list of choices</p>	
<p>HINT: Select “Active” if your agency has CSFP Senior boxes available.</p> <p>Select “Waiting List” if your agency has reached their prescribed CSFP Senior box caseload.</p>	
<p>f. Enter Enrollment Date</p>	
<p>HINT: Enrollment Date is a required field and usually the date you are entering CSFP Certification</p>	
<p>g. Scroll down to Proxy Signatories</p>	<p>Proxy Signatories Name and phone number are required</p> 
<p>HINT: A proxy is someone authorized by the client to obtain Services and provide an eSignature on the client’s behalf</p>	
<p>If client does not name a Proxy, Skip to step j.</p>	
<p>h. If client wants to authorize a proxy, click “Add a Proxy Signature”.</p>	
<p>i. Enter the Full Name and Phone Number of the Proxy.</p>	<p>Proxy Signatories Name and phone number are required</p> <p>* Name Phone</p> 
<p>j. Click either “Certify” or “Recertify” (only one button will be present)</p>	
<p>k. Read disclaimer to client before asking them to sign</p>	

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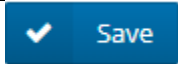
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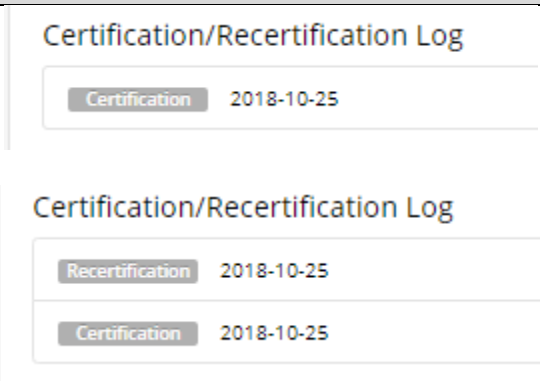
3. Select the client eSignature type	
<p>a. Scroll down to Client eSignature section and select Signature Type from the pulldown list</p>	

4. Obtain the client eSignature	
Sign On Screen option	
<p>a. Click on Open Signature Canvas</p>	
<p>b. You will see “Press Esc to exit full screen” for 5 seconds.</p>	
<p>Hint: DO NOT press the Esc key when you see the message, or you will need to repeat Step 3</p>	
<p>c. Request the client sign on the screen using their fingertip</p>	
<p>d. When the client has completed their signature, press Esc key on keyboard</p>	
ScripTel Signature Pad option	
<p>e. If ScripTel Signature Pad is selected, small signature window will appear</p>	<p>* Client Signature</p> <p>Have the client sign on the signature pad. Press "Cancel" on the signature pad or click "Clear" below to clear signature and re-take it.</p>
<p>f. Request client use the stylus to sign the Signature Pad.</p> <p>You will see the signature in the signature window as the client signs</p>	<p>* Client Signature</p> <p>Have the client sign on the signature pad. Press "Cancel" on the signature pad or click "Clear" below to clear signature and re-take it.</p>

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<p>HINT: Request client to click OK on the Signature Pad when done signing to clear the Signature Pad screen</p>	
<p>Hard Copy Signature option</p>	
<p>g. Check the “Client has Signed Hard Copy”</p>	<p>* Signature Type <input type="text" value="Hard Copy Signature"/></p> <p>* Signatory <input type="text" value="Preston Anderson"/></p> <p>* Client Signature <input checked="" type="checkbox"/> Client has Signed Hard Copy</p>
<p>RULE: A hard copy client signature for the certification must have been obtained and placed on file before selecting this option.</p>	
<p>All Signature Type options</p>	
<p>h. Scroll to the bottom of page and click Save</p>	

<p>4. Review Certification/Recertification Log</p>	
<p>a. The Certification or Recertification and the date will appear on the log</p>	
<p>CSFP Certification complete Proceed with Topic: (2) Services Visit (Steps 3-7) or Topic: (3) Services Delivery (Steps 5-10)</p>	