Link2Feed Instructions
Central Texas Food Bank
Commodity Supplemental Food Program (CSFP)

In order to simplify and streamline the intake process for the Commodity Supplemental Food Program, the Central Texas Food Bank and its CSFP Partners are utilizing Link2Feed. Link2Feed is an online system that allows us to complete client intake, record visits, and report on client demographics and usage patterns. These instructions will detail how to conduct the Initial Client Intake Process for CSFP participants.

<u>To Log-In to Link2Feed:</u>

1. Enter the following web address in your web browser: https://accounts.link2feed.com/users/sign_in
2. Enter you username and temporary password provided by Food Bank staff
    a. Username: your email address
    b. Temporary password: Link2Feed!
3. Click "**Log In**"
4. Select your CSFP Site from the drop down menu and press "**Continue**"
5. Select "**Client Intake**" on the Select an Application screen
    a. The Client Intake screen will allow you to add new clients, search for clients by name, date of birth, address, phone number, of CSFP ID. It will also show you a list of most recently accessed client records.

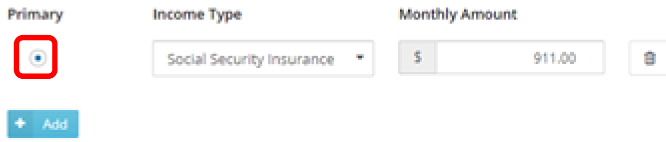
<u>To use Link2Feed to add a new client:</u>

The home screen of Link2Feed is called your *Dashboard.* Press the **Dashboard** button on the left-hand side of the screen at any time to come back to this screen. To conduct initial client intake, follow these steps:

1. Press the " **+ New Client**" button
2. Link2Feed will open a new client application. You will see a series of tabs along the top of the application. You must complete each tab in order. The system will not allow you to move to the next tab until all information is entered correctly on the previous tab.
3. Complete the *Personal* tab using the CSFP applicant's personal information.
    a. The following fields are required on the CSFP application and must be completed:
        i. Last Name
        ii. First Name
        iii. Date of Birth

    iv. Address (Street, City, State, Zip Code) (Note: only for clients who are currently unhoused, you can check the "No Fixed Address/Undisclosed" box)
    v. ID Type and Confirmation (Note: write "verified by [name]," and do NOT record the client's ID number)
    vi. Ethnicity (if provided by client)
  b. All other fields are optional, so if the client has not shared the information, mark "undisclosed":
    i. First Food Bank Visit (first time receiving CSFP)
    ii. Gender
    iii. Marital Status
    iv. Housing Status
    v. Email Addresses
    vi. Phone Numbers
    vii. Languages
    viii. Self-Identifies As
    ix. Household Members (Note: if another person in the same household also has a CSFP application to enter, add them here as a household member)
  c. When all of the information on the *Personal* tab is complete, press "**Save and Next**"
    i. Link2Feed will not allow you to move on to the next tab if any part of the Personal tab is left uncompleted.

4. Complete the *Profile* tab of the application. These fields are optional, so if the client has not shared the information, mark "undisclosed":
  a. Highest Education Level Completed
  b. Employment Type
  c. When all of the information on the *Profile* tab is complete, press "**Save and Next**"
5. Complete the *Monthly Income* tab of the application
  a. Press the "**+Add**" button to enter information on the applicant's monthly income.
    i. Clients are required to provide the amount of money but do not have to show proof of income.
    ii. Clients do not have to provide the source of their income (e.g. social security, pension, etc.). If the client has not shared their source of income, mark "undisclosed" for "Income Type"
    iii. Click on the circle under "Primary" to select a primary form of income for the client.



   b. When all of the information on the *Monthly Income* tab is complete, press “**Save and Next**”

6. Complete the information on the *Dietary Considerations* tab of the application. This section is optional, so if the client has not shared the information or has said that they have no special dietary considerations, do not select any boxes.
   a. When all of the information on the Dietary Considerations tab is complete, press “**Save and Next**”
7. Complete the *CSFP* tab of the application
   a. Enter the CSFP ID of the applicant. The CSFP ID tab can be found highlighted in blue on the upper right-hand corner of the application, next to the applicant’s name.
   b. Confirm that the location selected is correct
   c. Select “Active” from the Status drop-down menu.
      i. Assuming that the applicant meets all of the eligibility requirements to participate in the program, and your site has not yet reached the allocated number of CSFP participants.
      ii. Select “Waiting List” if the applicant meets all of the eligibility requirements, but you have already reached your allocated number of CSFP participants.
   d. If the applicant has designated a Proxy, press the “**+add a Proxy Signature**” button and enter the Proxy’s information
   e. Press the “**Certify**” button and enter the date on which the client completed their application
   f. Press “**Save and Next**”
8. The *Services* tab will appear, and you will be able to view the Household Summary of the new CSFP client
9. The CSFP Application is complete. To view or edit the client’s profile, Select “Client Search” from the Client drop-down menu on the left-hand side of the screen and select the client.
10. To add a new client, return to the Dashboard, and repeat these instructions.