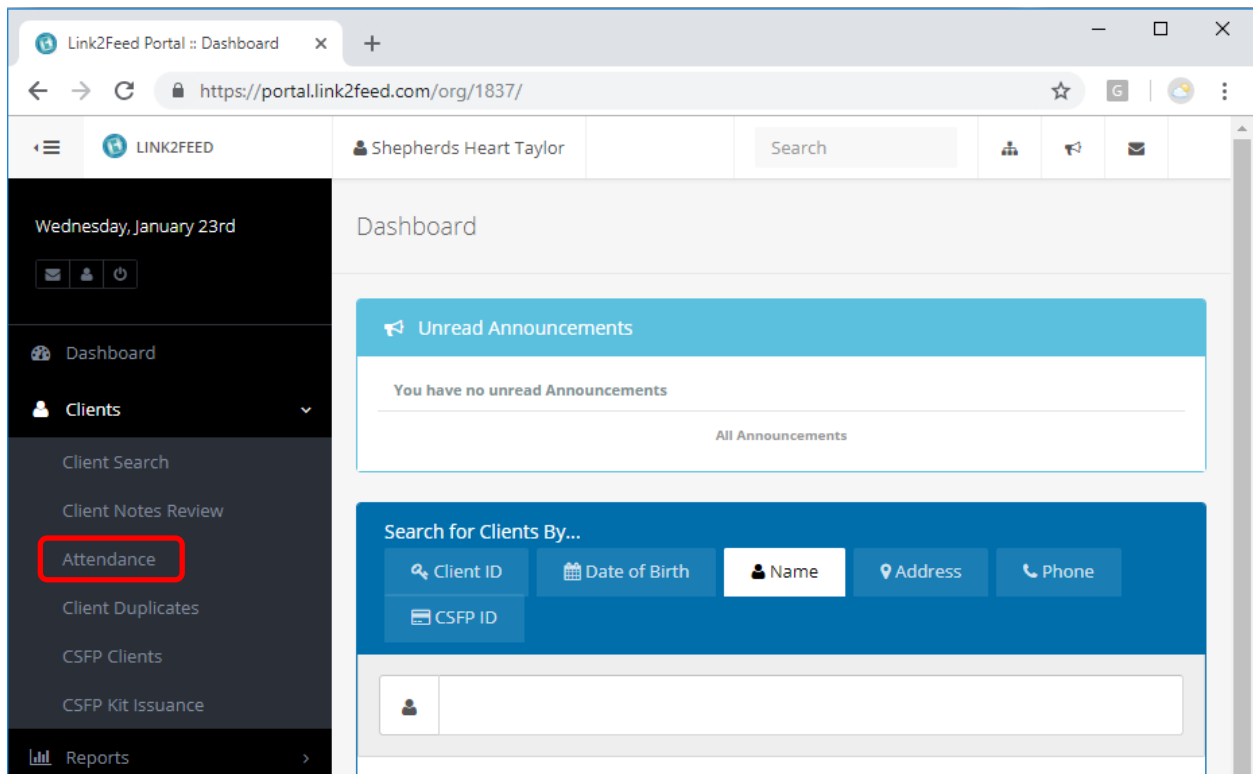
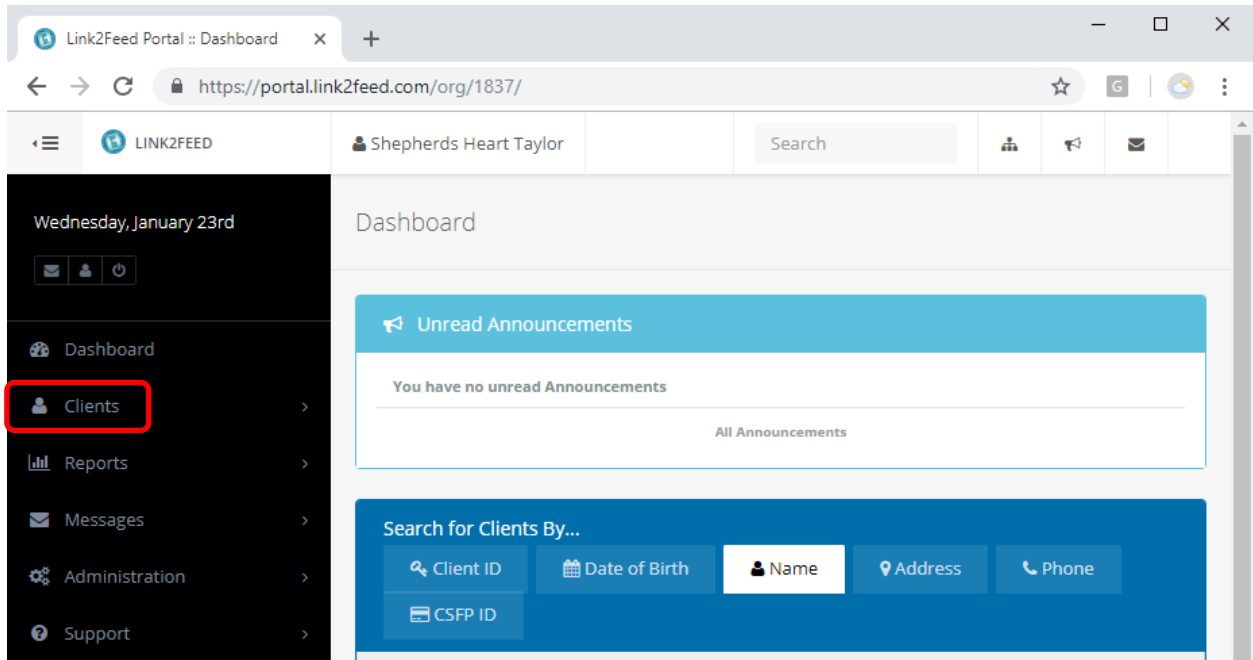


Opening an attendance group

1. Click on “Clients” in the black menu on the left to open a sub-menu, and then click “Attendance.”







2. On the “Attendance” page, find the attendance group that you want to work with.


Most sites with fewer than 300 CSFP clients have just one attendance group, usually named “Active.”
Larger sites may have multiple attendance groups.

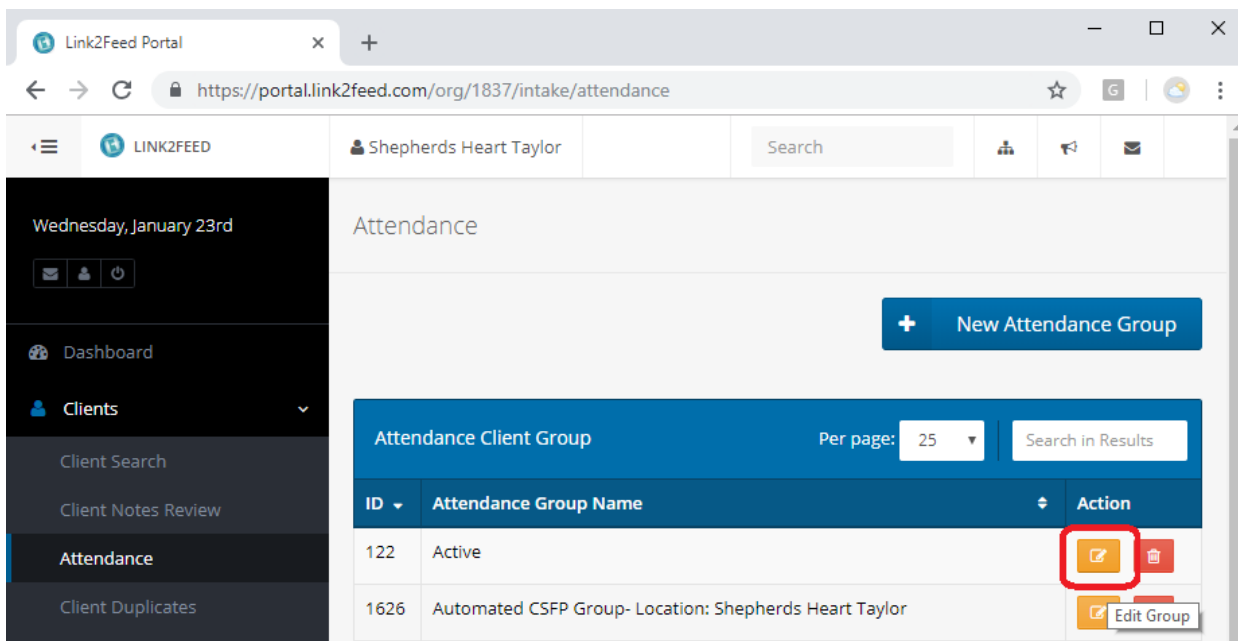
The screenshot shows the Link2Feed Portal interface. The browser address bar indicates the URL: <https://portal.link2feed.com/org/1837/intake/attendance>. The page title is "Attendance" and the organization is "Shepherds Heart Taylor".

On the left sidebar, the "Attendance" menu item is selected. The main content area shows a "New Attendance Group" button and a table of "Attendance Client Group" entries. The table has columns for ID, Attendance Group Name, and Action. The first row, with ID 122 and name "Active", is highlighted with a red border. The second row has ID 1626 and name "Automated CSFP Group- Location: Shepherds Heart Taylor".





ID	Attendance Group Name	Action
122	Active	 
1626	Automated CSFP Group- Location: Shepherds Heart Taylor	 

Below the table, it says "Showing 1 to 2 of 2 entries" and includes "Previous", "1", and "Next" navigation buttons. At the bottom, there is a "Filters" section with a "Filter" button.

3. For the group that you want to work with, click the yellow “edit” button  to open the group.



The screenshot shows the Link2Feed Portal interface. The browser address bar displays the URL <https://portal.link2feed.com/org/1837/intake/attendance>. The page title is "Attendance". A sidebar on the left contains navigation options: "Wednesday, January 23rd", "Dashboard", "Clients" (with a dropdown arrow), "Client Search", "Client Notes Review", "Attendance" (highlighted), and "Client Duplicates". The main content area features a "New Attendance Group" button and a table titled "Attendance Client Group". The table has columns for "ID", "Attendance Group Name", and "Action". The "Action" column contains a yellow "edit" button (highlighted with a red box) and a red "delete" button. A tooltip labeled "Edit Group" is visible over the yellow button. The table data is as follows:

ID	Attendance Group Name	Action
122	Active	 
1626	Automated CSFP Group- Location: Shepherds Heart Taylor	 

4. You are now working within your chosen attendance group.

Link2Feed Portal

portal.link2feed.com/org/1837/intake/attendance-load-clients/122

LINK2FEED | Shepherds Heart Taylor | Search | Elizabeth

Tuesday, April 13th

- Dashboard
- Clients
- Reports
- Messages
- Administration
- Support

Attendance

* Attendance Group Name

Active

Attendance Programs

OFF CSFP Visit

Search for Clients by

- Date of Birth
- Name
- Address
- Phone
- Barcode
- CSFP ID

+ New Client

Record Attendance

Copy CSV PDF Print Select All De-select All

Per page: 10 Search

ID #	Client Name	Household Summary	Dietary Considerations	Last Visit Date	Notifications	Actions
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Adding clients to an attendance group

1. You can add clients to an attendance group by searching for them the same way you would search for a client from your dashboard. You can search for clients by their client ID number, date of birth, name, address, phone number, or CSFP ID (which should be the same as their client ID number).

To search by name, simply begin typing the name of the client you want to add to the attendance group, and names should begin to pop up. For example, if you type “Smith,” everyone with “Smith” in their name will pop up. The more you type of a person’s name, the more Link2Feed will narrow down their name.

* Attendance Group Name

Active

Search for Clients By... Client ID Date of Birth Name Address Phone CSFP ID

smith

	alfred, smith	1951-12-12
	Lott (Smith), Hattie	1924-10-08
	Mathis-Smith, Hazel	1952-03-03
	smith, Alice	1941-10-16
	Smith, Anna C.	1930-05-12

* Attendance Group Name

Active

Search for Clients By... Client ID Date of Birth Name Address Phone CSFP ID

smith ch

	Smith, Christina	1956-08-16
	Smith, Robert Mitchell	1952-11-11

- If you see the name of the client you want pop up, you can click on the name to add them to the attendance group.

* Attendance Group Name

Active

Search for Clients By... Client ID Date of Birth Name Address Phone CSFP ID

Smith, Bonnie

	Smith, Bonnie	1948-04-02
	Smith, Deborah	1953-03-01

- Another way to search for a client to add is to type part of their name and hit “Enter” on your keyboard. This will bring up a list of search results that include all possible clients that you want to add.

* Attendance Group Name

Active

Search for Clients By... Client ID Date of Birth Name Address Phone CSFP ID

smith

New Client

Search Results

Per page: 10

Client ID #	Last / Nickname	First Name	Date of Birth	
337927	Smith	Zenaida	1949-07-24	
340943	Smith	Flora	1935-12-12	
341427	Smith	Roscoe	1951-12-09	
346690	Smith	Ora	1939-06-24	

You can then click the blue plus sign button to add the client to the attendance group.

- When you add a client, a green notice will appear in the top right corner saying: "Success: Client added to group." Another notice will appear below the search bar that says "Warning! Client has been added to the group. To search and record the visit for the client, update the attendance group."

The screenshot shows the 'Attendance' section of a software interface. At the top left, it says 'Shepherds Heart Taylor'. There is a search bar and a user profile for 'Elizabeth'. A green success message in the top right corner reads: 'Success Client added to group'. Below this, the 'Attendance Group Name' is set to 'Active'. A search bar for clients is active, with 'Smith, Bonnie' entered. Below the search bar is a '+ New Client' button. At the bottom of the interface, there is a blue bar with 'Record Attendance' and several utility buttons: Copy, CSV, PDF, Print, Select All, and De-select All. A yellow warning message is displayed in the center: 'Warning! Client has been added to the group. To search and record the visit for the client, update the attendance group!'.

- Scroll to the bottom of the page and click "Update Group" to finalize the addition of the client to the group. You do not have to do this after adding every client, but it's best to do it every few minutes to guarantee that your work is saved by Link2Feed.

A close-up of the bottom of the interface showing three buttons: 'Save Visit' (with a checkmark), 'Update Group' (with a checkmark and highlighted by a red box), and 'Cancel' (with an 'x').

When you have clicked "Update Group," a green notice will appear in the top right corner saying: "Success: Group updated successfully!"

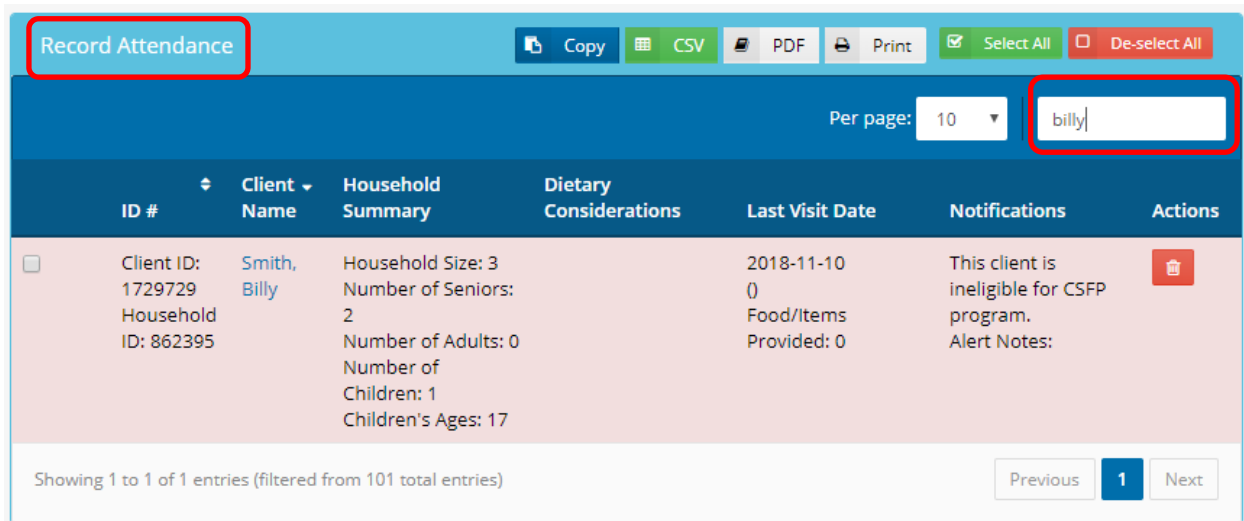
The screenshot shows the same interface as before, but with a green success message in the top right corner that reads: 'Success Group updated successfully!'. The utility buttons at the bottom are also visible.

Removing clients from an attendance group


If a client will no longer be picking up at your CSFP site for any reason, the client should be removed from your attendance group to prevent it from becoming cluttered with names you are not using.


Deleting a client from an attendance group does NOT delete them from Link2Feed, and they can easily be added back to the group again if need be.

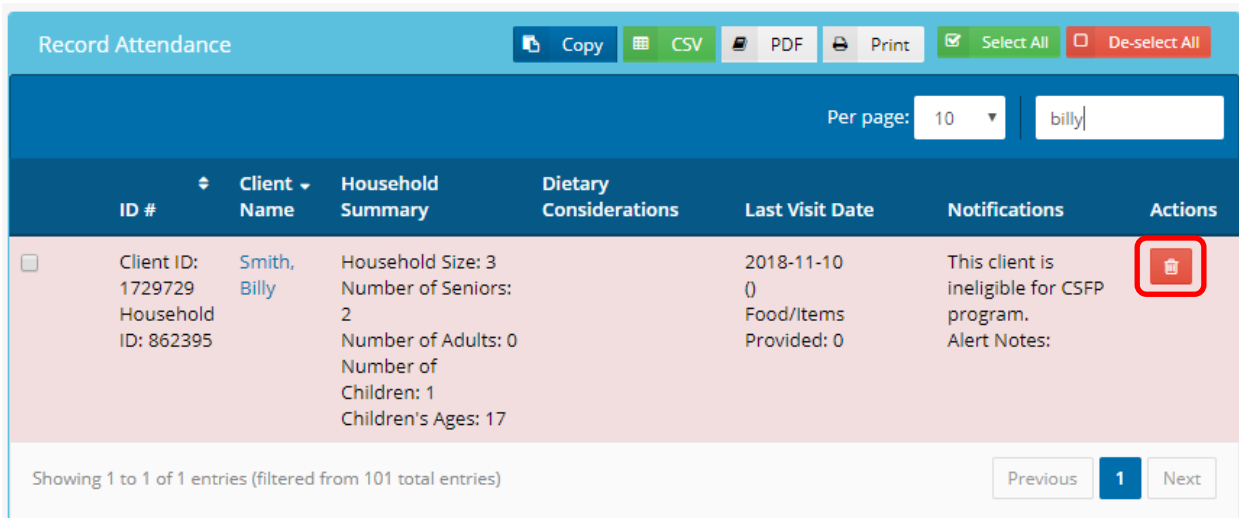
1. Scroll down to “Record Attendance” and type part of the name of the client you wish to remove into the search bar on the right.




The screenshot shows the 'Record Attendance' interface. At the top, there is a search bar containing the text 'billy'. Below the search bar is a table with the following columns: ID #, Client Name, Household Summary, Dietary Considerations, Last Visit Date, Notifications, and Actions. The table contains one entry for a client named 'Smith, Billy'. The 'Actions' column for this entry contains a trash can icon. The interface also includes a 'Per page' dropdown set to 10, and buttons for 'Copy', 'CSV', 'PDF', 'Print', 'Select All', and 'De-select All'.

ID #	Client Name	Household Summary	Dietary Considerations	Last Visit Date	Notifications	Actions
Client ID: 1729729 Household ID: 862395	Smith, Billy	Household Size: 3 Number of Seniors: 2 Number of Adults: 0 Number of Children: 1 Children's Ages: 17		2018-11-10 (Food/Items Provided: 0	This client is ineligible for CSFP program. Alert Notes:	

2. Click the trash can button  to remove the client from the attendance group. The client will instantly be removed from the group.



This screenshot is identical to the previous one, but the trash can icon in the 'Actions' column of the table is highlighted with a red box, indicating the step to click it to remove the client.

ID #	Client Name	Household Summary	Dietary Considerations	Last Visit Date	Notifications	Actions
Client ID: 1729729 Household ID: 862395	Smith, Billy	Household Size: 3 Number of Seniors: 2 Number of Adults: 0 Number of Children: 1 Children's Ages: 17		2018-11-10 (Food/Items Provided: 0	This client is ineligible for CSFP program. Alert Notes:	

Editing a client's profile from the attendance group

The attendance group is a great place to review all of your CSFP clients and make updates to their profiles as needed, as you can see a summary of everyone's information at a glance.

1. Click on the name of the client whose profile you want to edit. This will open the client's profile in a new tab. From there you can easily make any changes you need to.

<input type="checkbox"/>	Client ID: 349633 Household ID: 176487	Carranza, Pedro	Household Size: 1 Number of Seniors: 1 Number of Adults: 0 Number of Children: 0 Children's Ages:	Diabetic	2018-12-08 (Shepherds Heart Taylor) Food/Items Provided: 0	Recertification Required — You must recertify to continue. Alert Notes:	
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The screenshot shows the Link2Feed Portal interface. The browser tab is titled 'Services Client # 349633'. The URL is <https://portal.link2feed.com/org/1837/intake/349633/page/services>. The page features a dark sidebar with navigation options: 'Dashboard' and 'Clients'. The main content area has a top navigation bar with the user's name 'Elizabeth' and a search bar. Below the navigation bar, there is a red warning banner that reads 'Recertification Required — You must recertify to continue. Verify documentation and have the client sign the recertification by pressing Recertify.' Below the warning, there is a row of tabs: 'PERSONAL', 'PROFILE', 'MONTHLY INCOME', 'DIETARY CONSIDER...', 'CSFP', 'SERVICES', and 'NOTES'. The 'SERVICES' tab is currently selected. Below the tabs, the 'Services' section is visible, showing the client's name 'Carranza, Pedro' and the ID '349633'.

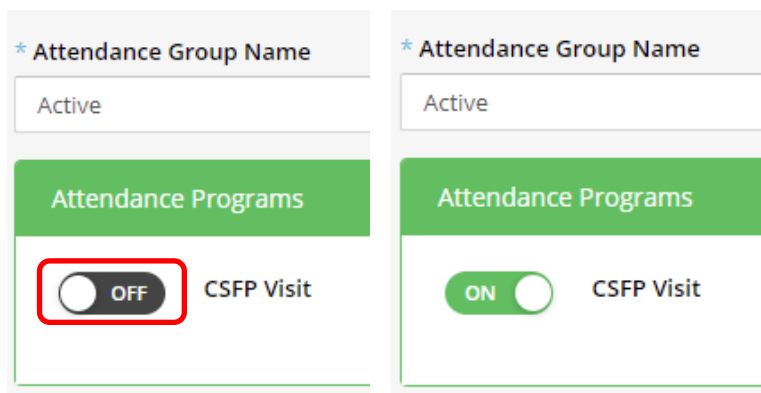
2. When you are finished editing the client's profile, you can simply close the tab to return to the attendance group.

The screenshot shows the browser tab bar for the Link2Feed Portal. The tab is titled 'Services Client # 349633'. The URL is <https://portal.link2feed.com/org/1837/intake/349633/page/services>. The tab bar shows the 'Link2Feed Portal' icon, the tab title, and a red box around the close button (X). The main content area below the tab bar shows the 'LINK2FEED' logo and the user's name 'Shepherds Heart Taylor'.

Recording a visit from the attendance group

The biggest time-saving feature of the attendance group is the ability to record multiple clients' visits simultaneously rather than recording each client's visit separately.

1. At the top of the page, under "Attendance Programs," click the "OFF" button by "CSFP Visit" to toggle it to "ON."



2. For each client who had a visit, click on the little box to the left of a client's name to "check" the box.

<input checked="" type="checkbox"/>	Client ID: 354555 Household ID: 179262	Demps, Juanita	Household Size: 1 Number of Seniors: 1 Number of Adults: 0 Number of Children: 0 Children's Ages:
<input type="checkbox"/>	Client ID: 363988 Household ID: 183833	Demps, Melvin	Household Size: 1 Number of Seniors: 1 Number of Adults: 0 Number of Children: 0 Children's Ages:

3. When you have checked about 10 names, we recommend that you save the visit before checking any other boxes. That way your work is not lost if something happens with the computer.
4. Scroll to the bottom of the page and click "New CSFP Visit."

The screenshot shows a client record interface. At the top, there is a light pink header area with the following information: a checkbox, Client ID: 347111, Filla, Helen, Household ID: 175085, and Children's Ages: Household Size: 2, Number of Seniors: 2, Number of Adults: 0, Number of Children: 0, Children's Ages: Below this is a white bar with the text "Showing 21 to 30 of 100 entries". A large blue button with the text "New CSFP Visit" and a white plus icon is highlighted with a red rounded rectangle.

5. A new set of boxes will open. Edit the "Visit/Pick Up Date" to match the date that these clients picked up their box.

The screenshot shows a "Visit Details" form. The title "Visit Details" is in a blue header. Below it, the field "* Visit/Pick Up Date" is highlighted. The date "2019-01-23" is entered in the field, which includes a calendar icon on the left.

6. You may record a note with this visit or leave the "Additional Notes/Information" section blank.

Additional Notes / Information

- Mark this note as an alert Mark this note as private (show to my organization only)

- In the “Client eSignature” section, click the drop-down menu under “Signature Type” to select what type of signature you collected. If your clients signed the hard copy sign-in sheet, select “Hard Copy Signature.” Skip the “Signatory” box. Click the box next to “Client has Signed Hard Copy” to check the box, and make sure the “Date” matches the date of the actual visit.

Client eSignature

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* Signature Type

Hard Copy Signature

Signatory

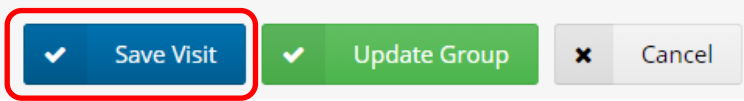
* Client Signature

Client has Signed Hard Copy

Date

2019-01-23

8. Click “Save Visit” at the bottom of the page to record a visit for all the clients you checked off.



9. A new page will open with a “Visit Summary” listing every client for whom you just recorded a visit. Click “Back to List” to return to the attendance group.

