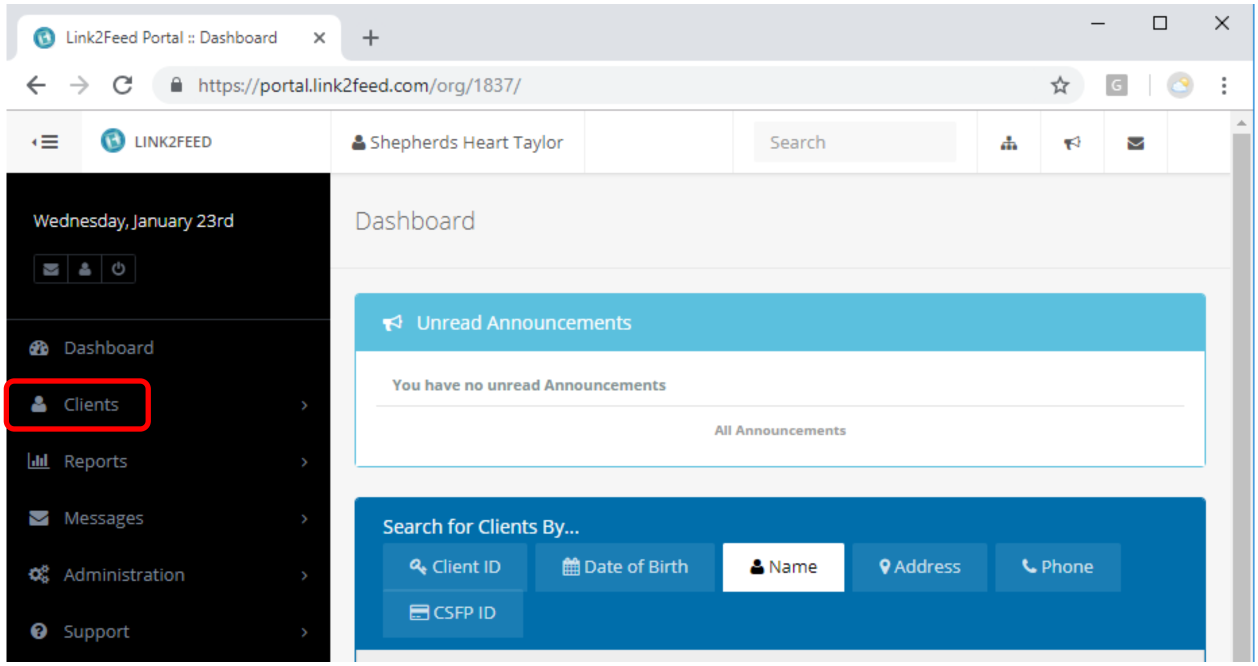
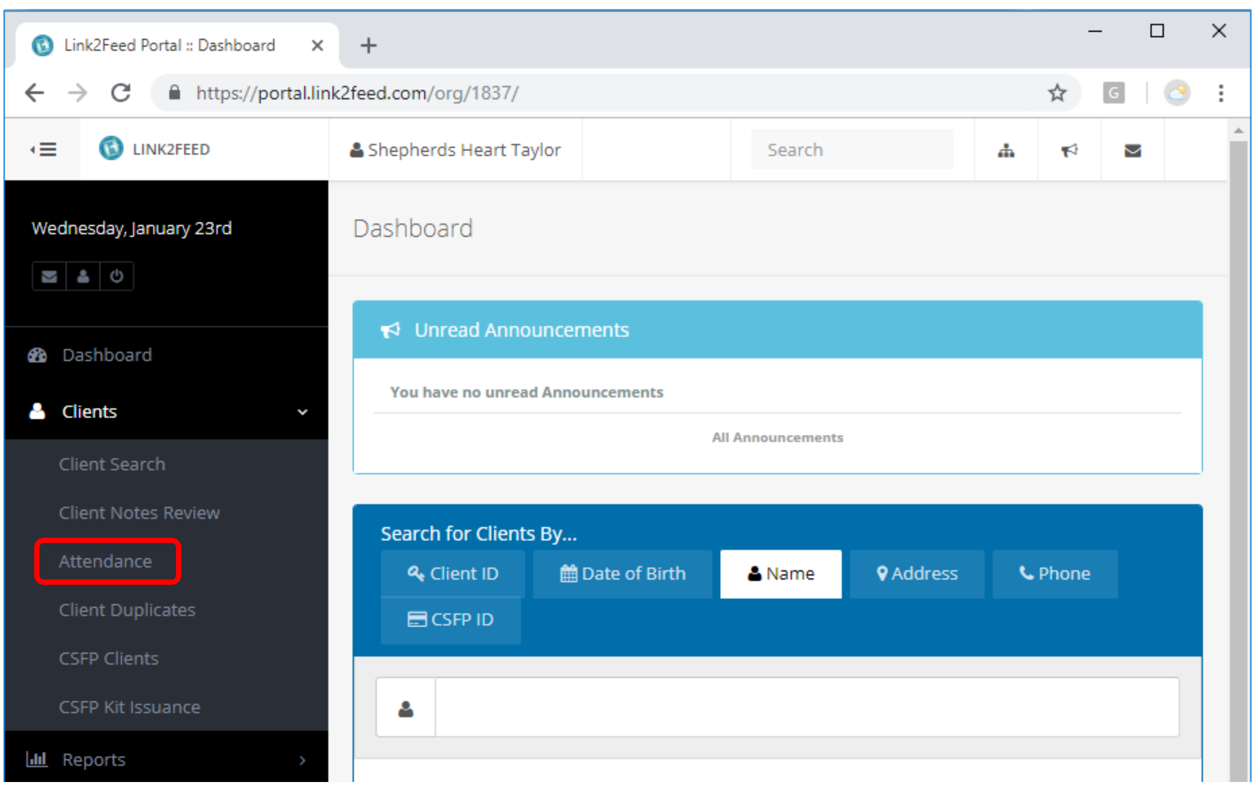
Opening an attendance group

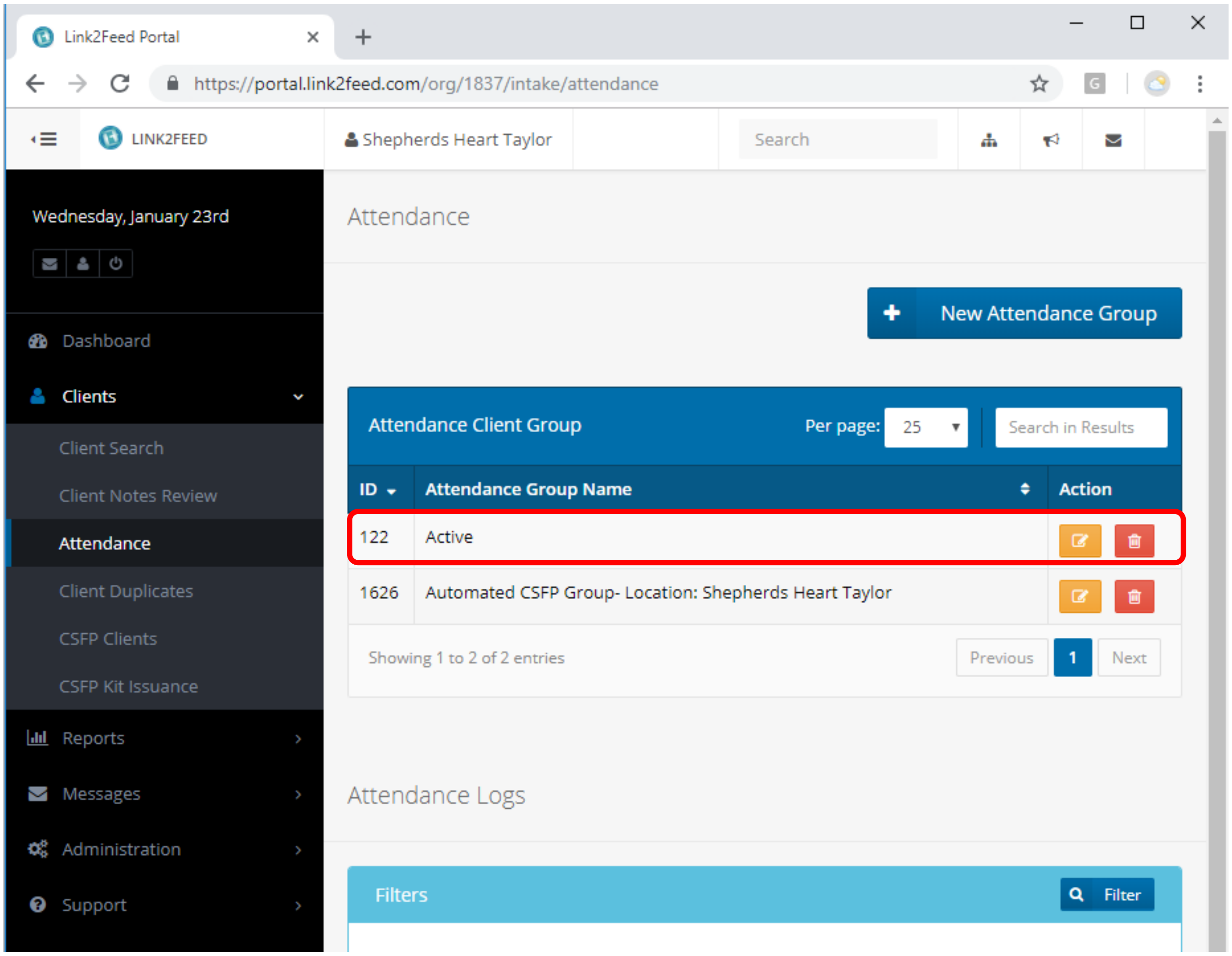
1. Click on "Clients" in the black menu on the left to open a sub-menu, and then click "Attendance."



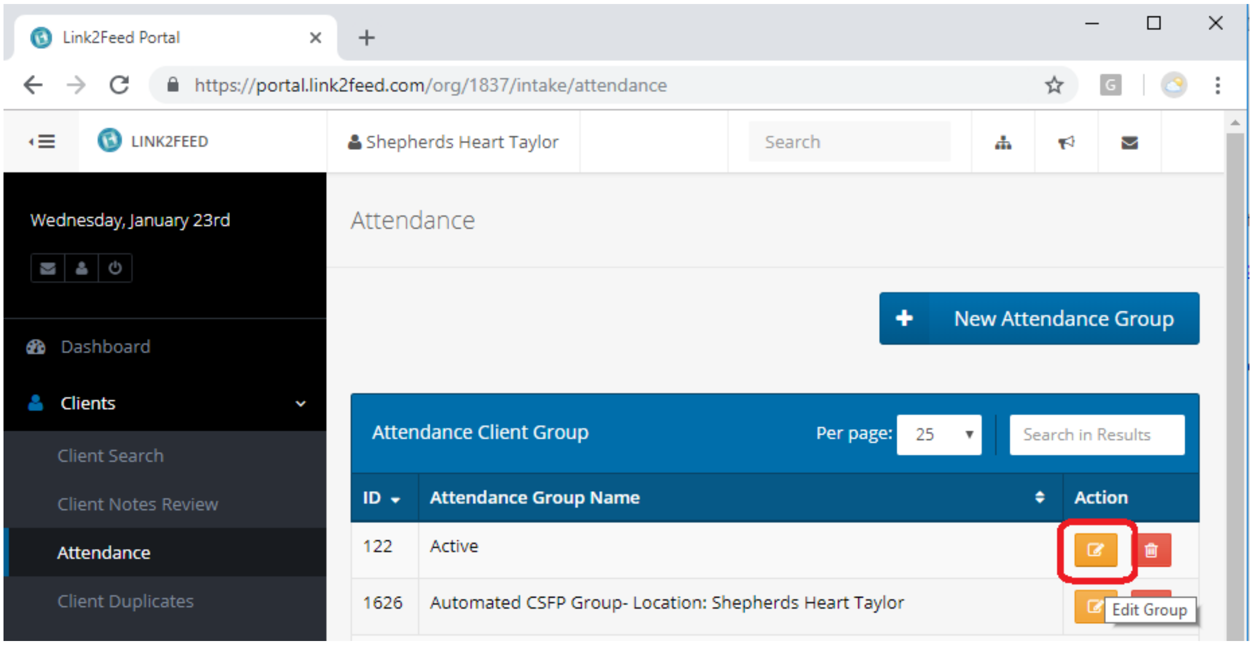


2. On the "Attendance" page, find the attendance group that you want to work with.

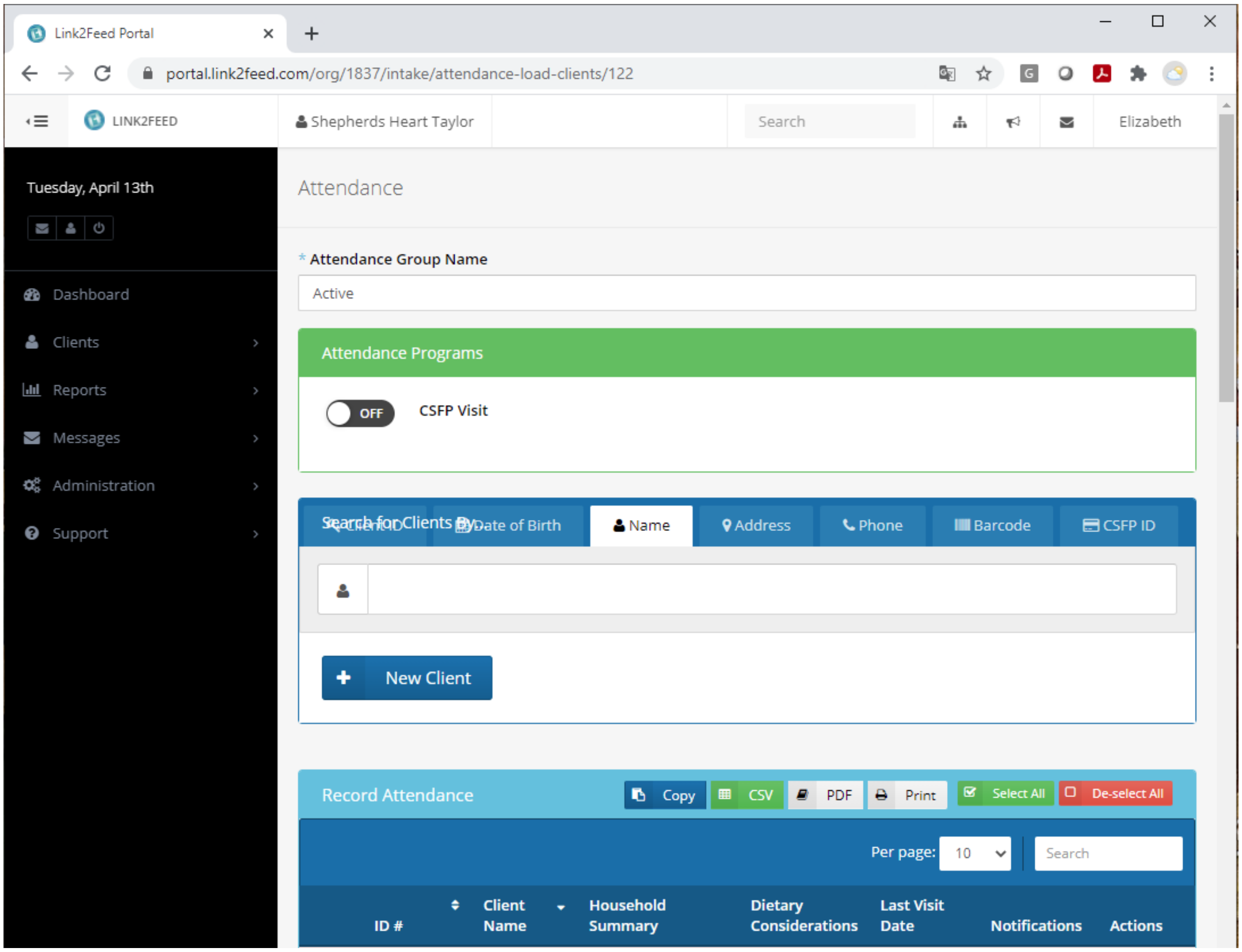
Most sites with fewer than 300 CSFP clients have just one attendance group, usually named "Active." Larger sites may have multiple attendance groups.



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



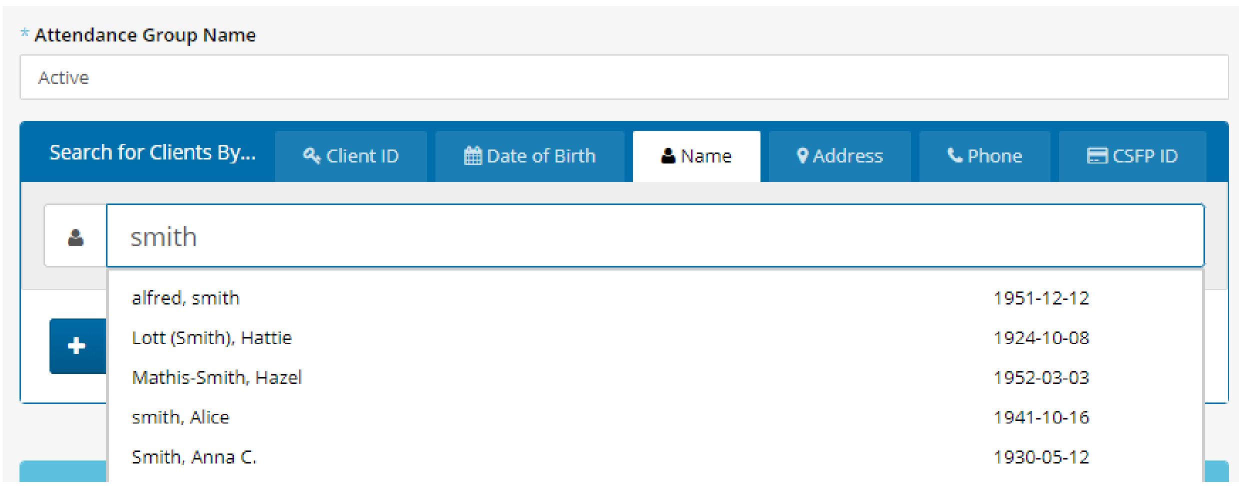
4. You are now working within your chosen attendance group.

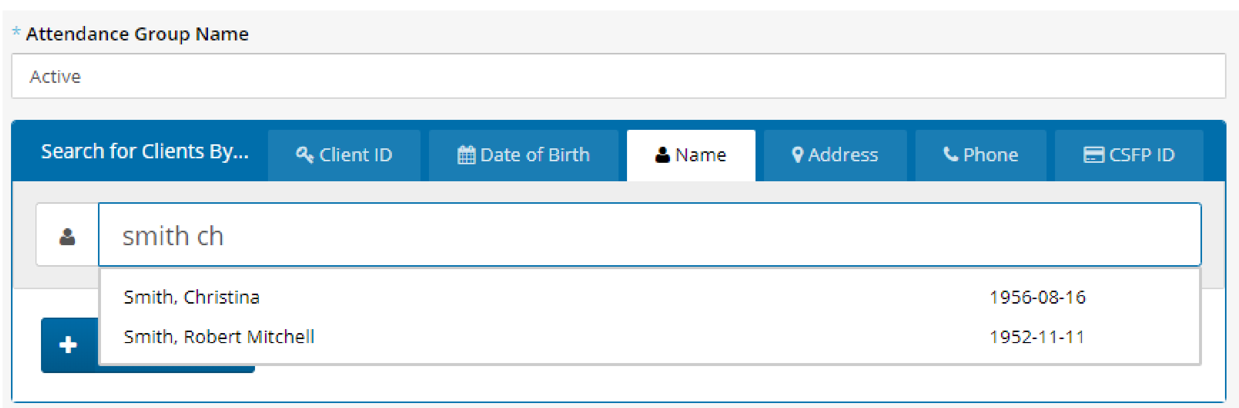

Link2Feed Portal
portal.link2feed.com/org/1837/intake/attendance-load-clients/122
LINK2FEED
Shepherds Heart Taylor
Search
Elizabeth
Tuesday, April 13th
Dashboard
Clients
Reports
Messages
Administration
Support
Attendance
* Attendance Group Name
Active
Attendance Programs
OFF
CSFP Visit
Search for Clients 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

Adding clients to an attendance group

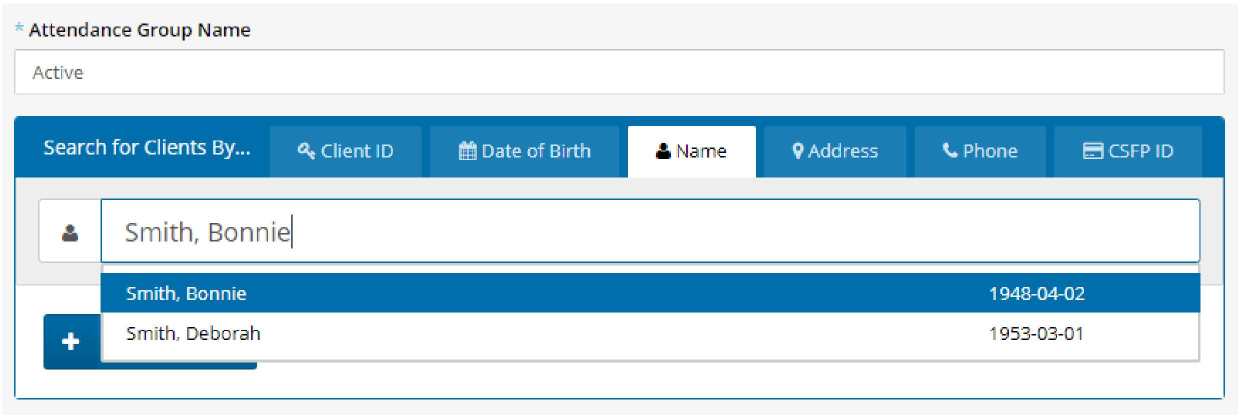
1. You can add clients to an attendance group by searching for them the same way you would search for a client from your dashboard. You can search for clients by their client ID number, date of birth, name, address, phone number, or CSFP ID (which should be the same as their client ID number).

   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.

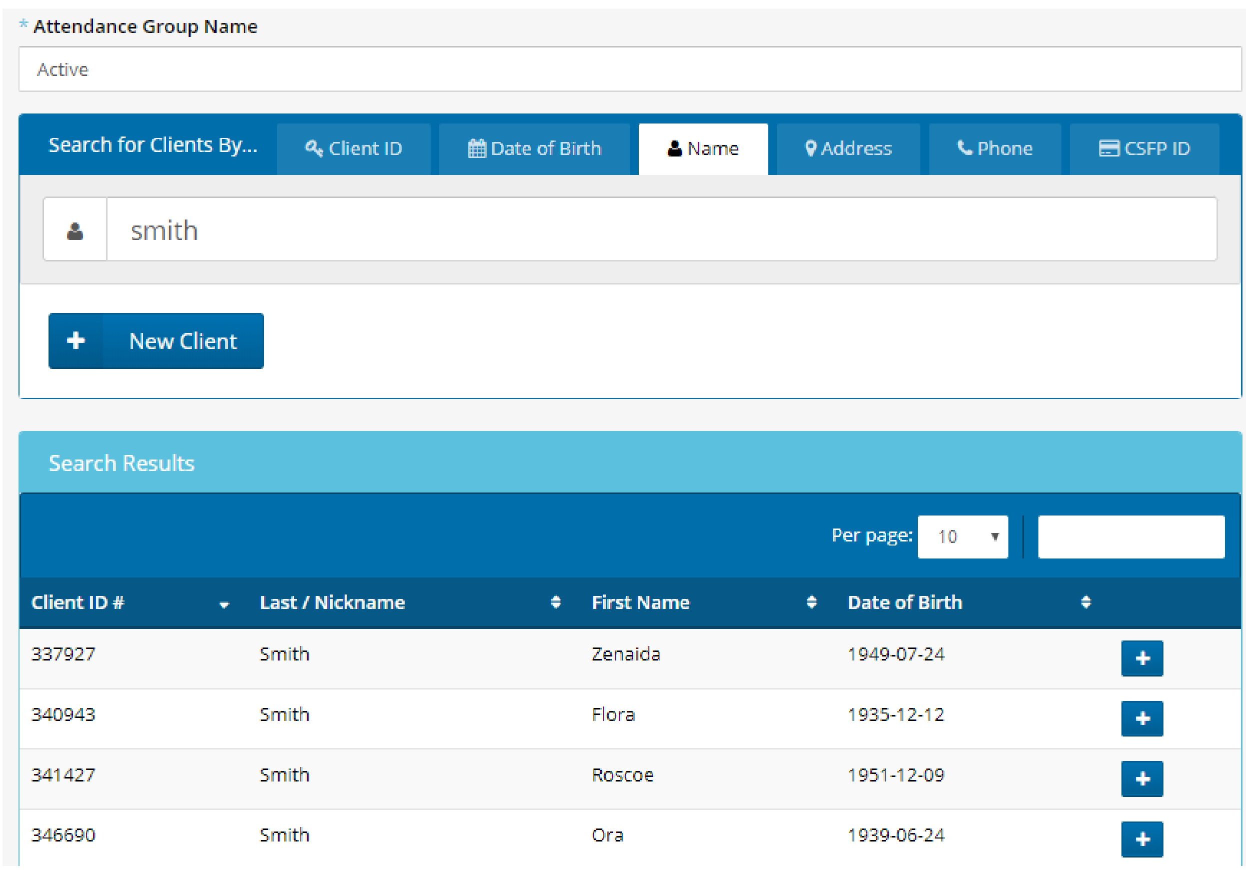




2. If you see the name of the client you want pop up, you can click on the name to add them to the attendance group.

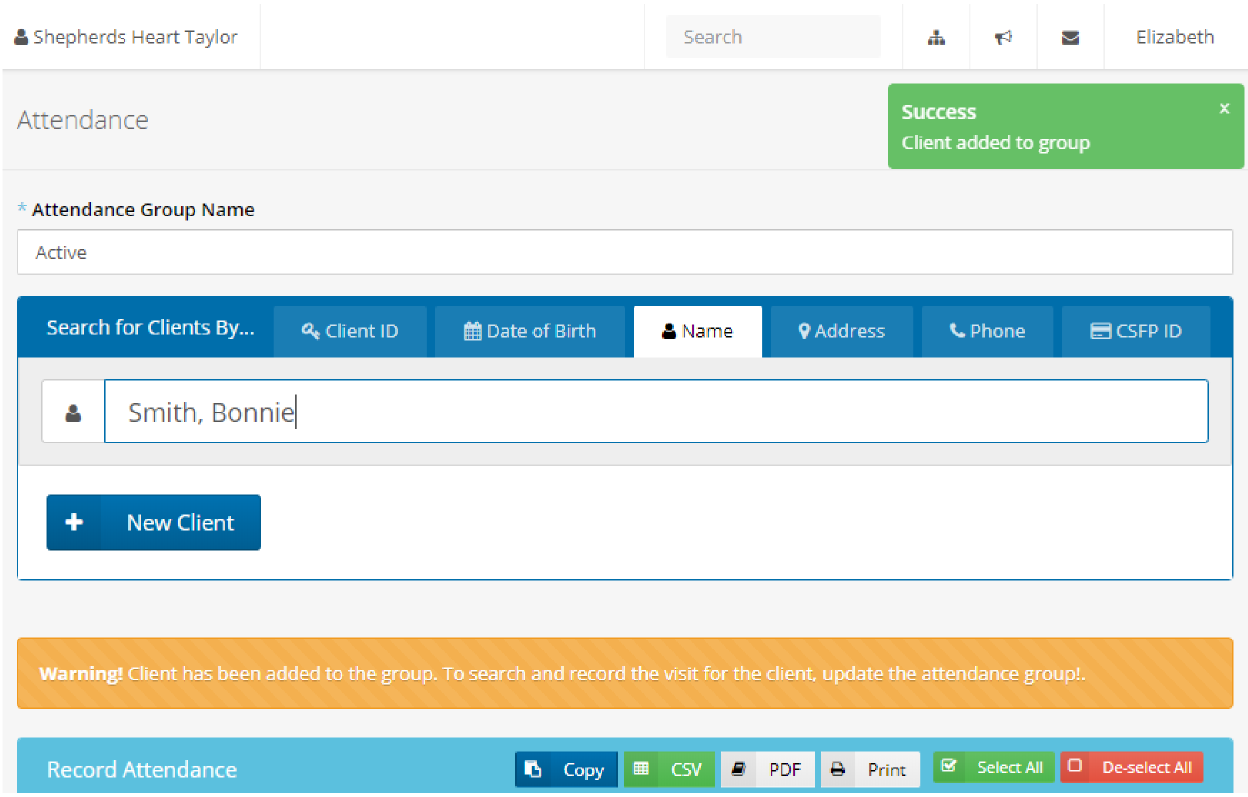


3. Another way to search for a client to add is to type part of their name and hit "Enter" on your keyboard. This will bring up a list of search results that include all possible clients that you want to add.

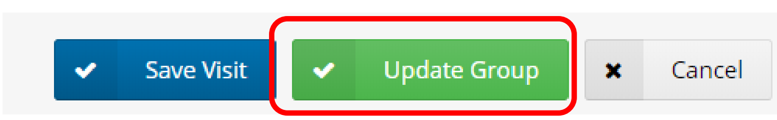


You can then click the blue plus sign button + to add the client to the attendance group.

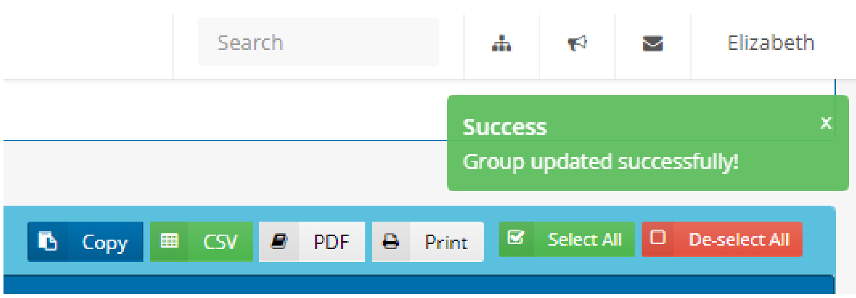
4. When you add a client, a green notice will appear in the top right corning saying: "Success: Client added to group." Another notice will appear below the search bar that says "Warning! Client has been added to the group. To search and record the visit for the client, update the attendance group."



5. 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.



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

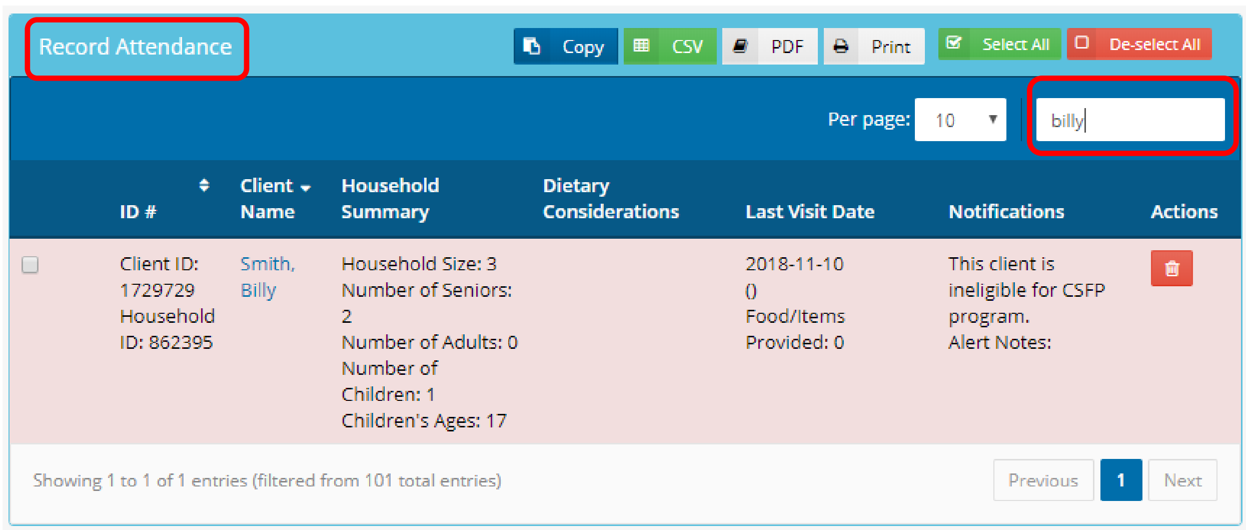


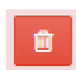
Removing clients from an attendance group

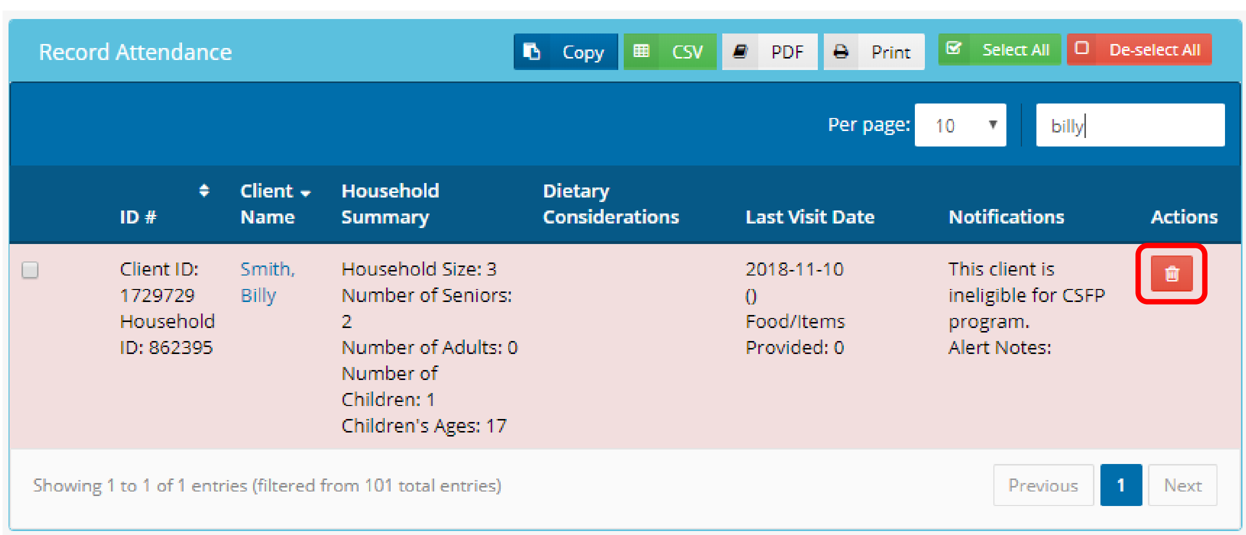
If a client will no longer be picking up at your CSFP site for any reason, the client should be removed from your attendance group to prevent it from becoming cluttered with names you are not using.

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.



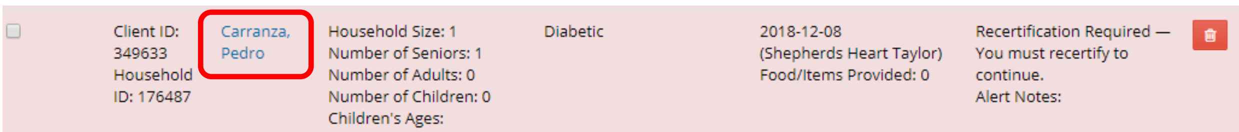
2. Click the trash can button  to remove the client from the attendance group. The client will instantly be removed from the group.

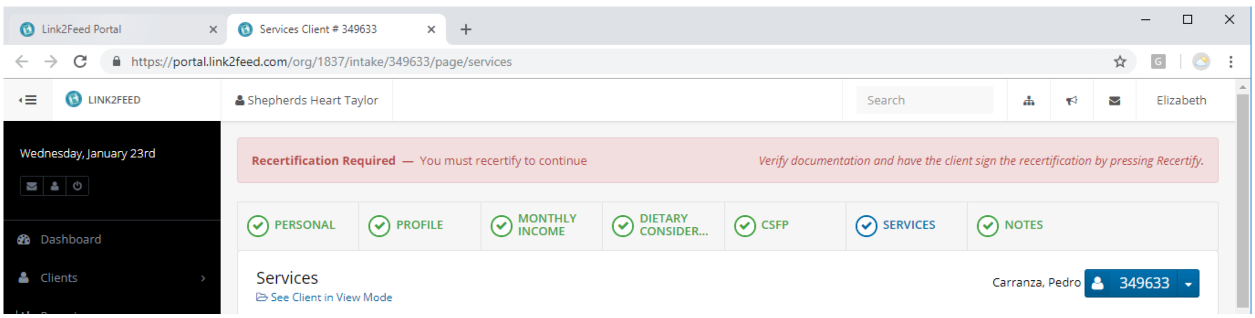


Editing a client's profile from the attendance group

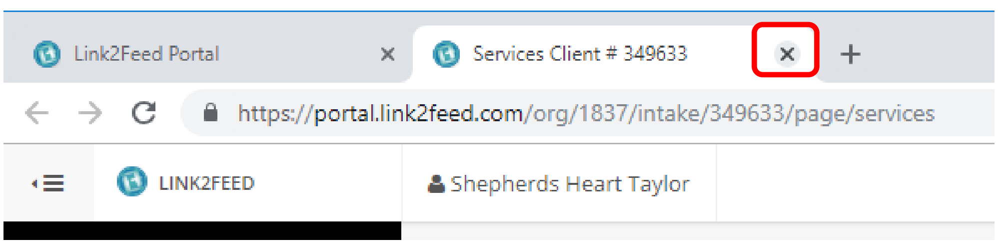
The attendance group is a great place to review all of your CSFP clients and make updates to their profiles as needed, as you can see a summary of everyone's information at a glance.

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.





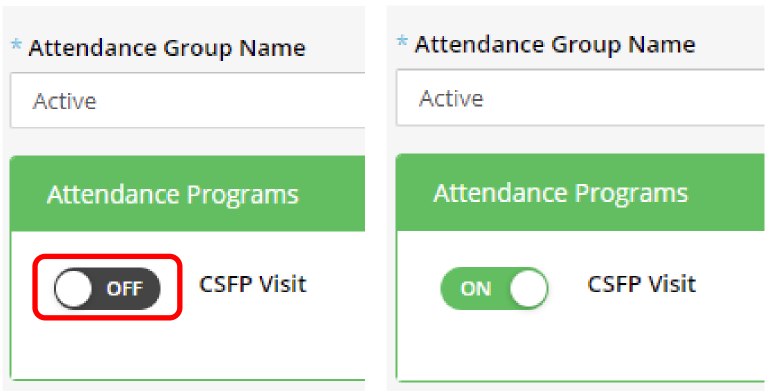
2. When you are finished editing the client's profile, you can simply close the tab to return to the attendance group.



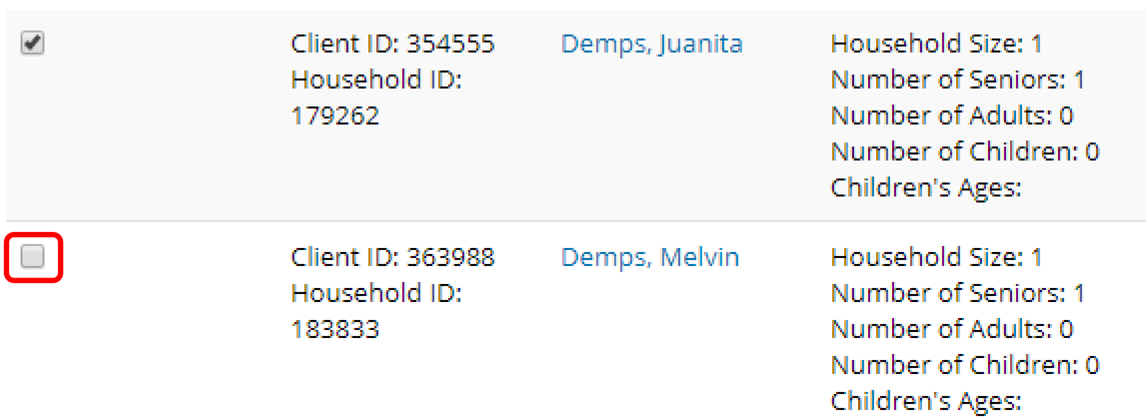
Recording a visit from the attendance group

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."

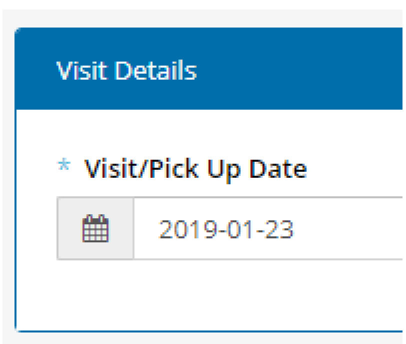


2. For each client who had a visit, click on the little box to the left of a client's name to "check" the box.

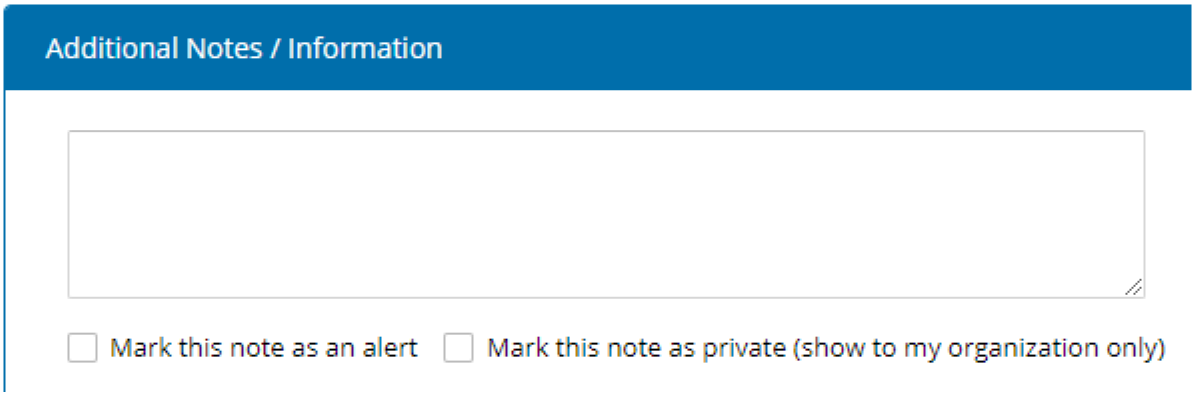


3. When you have checked about 10 names, we recommend that you save the visit before checking any other boxes. That way your work is not lost if something happens with the computer.
4. Scroll to the bottom of the page and click "New CSFP Visit."

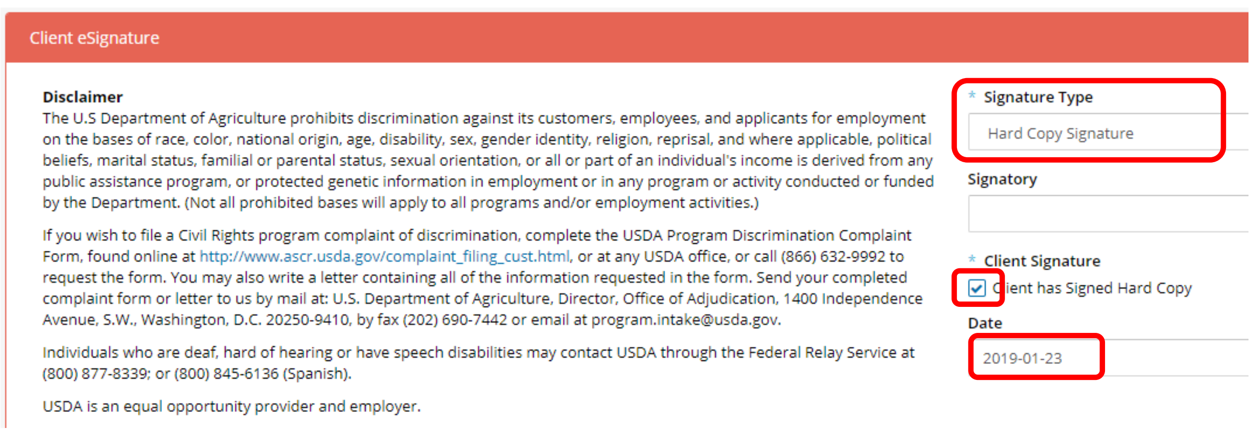
5. A new set of boxes will open. Edit the "Visit/Pick Up Date" to match the date that these clients picked up their box.



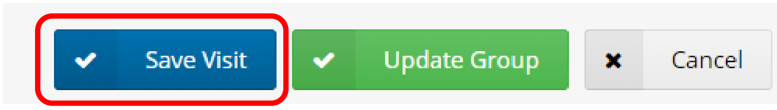
6. You may record a note with this visit or leave the "Additional Notes/Information" section blank.



7. 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.



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.