HOPE INTAKE

The purpose of this document is to solidify HOPE intake procedures in an effort to ensure HOPE partners are on the same page with what is required for the intake and proxy processes. As a reminder, HOPE uses TEFAP (The Emergency Food Assistance Program) product and therefore must align with TEFAP procedures. TEFAP is through the USDA, which is why there are requirements associated with the product.

Onboarding New Client with HOPE Intake Form

When onboarding a new client into the HOPE program, please use the English Form or Spanish Form. You must also provide a copy of the Written Notice of Beneficiary Rights in either English or Spanish. You can laminate a copy and display it during onboarding. Below is the information gathered from clients on the intake form:

- Participant Name *
- Number of People in Household
- Date of Birth (not required; clients must disclose they are 55 or older)
- Address
- Proxy & Address * (if applicable)
- Eligibility
- Certification Period
- Certifier Signature & Date *
- Basis of Eligibility
- Site Name *

Information from Client (* = Required by TEFAP)

Notes about Onboarding Process

- Each qualifying senior can be a HOPE client, it is broken down by individual not household

Checking In Existing Client for HOPE Pick Up

Logging a HOPE visit looks different from site to site. The Central Texas Food Bank has developed tips to improve the check in process to reduce the time spent for our clients and partners. We have evaluated three processes and the capacity needed to prepare for check-in, during check-in, and processing check-ins to aid in deciding which method best suits your agency. We used green, yellow, and red to identify if the part of the process requires low, medium, or high effort, respectively.

	Sign-In Sheet	Pre-Print HOPE Client List	Logging Visits in Oasis Insights with a Barcode Scanner
Prepare for Check-In	Print Off Sheet Prior to Distribution	Print Off Sheet Prior to Distribution	Gather Materials (Scanner)
During Check-In	Each Client Must Write Out Name, Age, ZIP Code Each Visit	Intake Volunteer or Client Checks Off Name	Client Provides ID or Card to be Scanned
Processing Check-In	Manually Count Each Entry	Log Each Visit & Check Totals in Spreadsheet	Each Visit is Logged with a Scan
Analyzing Check-In Data	With Only Physical Copies of Sign-In Sheets, Nearly Impossible to Evaluate	Functions Available to Create Charts and Derive Information	Reports Available to Create Charts and Derive Information

Sign-In Sheet

CTFB has created a sign-in template for partners to use, access it using this link: HOPE Client Sign-In Sheet. Partners are not required to use this template, you just need a process for recording visits.

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Pre-Print HOPE Client List

Tracking your HOPE clients in a spreadsheet, like Excel, allows you and others at your agency to quantify visits and print out the client list prior to a HOPE distribution. With a pre-printed client list, you can include proxy names on the list. As you recertify clients, changes should be reflected in the spreadsheet, as well. Make sure to create a process for adding new clients to this spreadsheet, it is helpful to schedule time each month to check for new applicants. For more information and tips on how to manage a spreadsheet like this, please contact us at distributionprograms@centraltexasfoodbank.org.

Logging Visits in Oasis Insights with a Barcode Scanner

Utilizing Oasis Insights and a barcode scanner requires investing time and resources but greatly reduces the time before, during, and after the check-in process. This tool allows you to track clients' and proxies' data *with a click of a button*. Similar to the pre-printed list method, you want to create a process for adding new clients to Oasis. For more information and tips on how to manage your client list in Oasis, please contact us at distributionprograms@centraltexasfoodbank.org.

Notes about Recertifying Process

- You can recertify a HOPE client over the phone

Proxy Process

TEFAP Proxy Process

A proxy is a person designated by a participant to act for the participant as necessary throughout every process of TEFAP. Proxies may also act for the participant at application, certification, food package distribution, and recertification. A proxy must provide proof of identification before picking up a food package. A participant may designate as many proxies as necessary to ensure that the food package is picked up. Likewise, a single proxy can be designated by multiple participants.

Requirements - Partners must collect at least the following information:

1. Participant's name
2. Name of site
3. Authorization, including proxy name
4. Duration of proxy

The Partner must maintain each written proxy designation on file. Proxy identification must be reviewed at each application, certification, food package distribution, and recertification.

There are two ways to change a proxy:

1. In a written statement
2. In-person at the Food Bank or site, where proxy changes are noted and maintained in the participant file

Notes about Proxy Process

- There needs to be a process for verifying that a client is still eligible when a proxy is picking up
- Each proxy needs to have permission from the client they are picking up for and an ID
- Looks different at each site
    - Attach proxy form or note to client application
    - Have proxy bring the form or note to each distribution
    - Track proxies through Oasis or Excel
- A proxy can only pick up for 3 clients per month, including themselves

Additional Notes

- If you'd like to talk through your current process and strategize improvements, reach out to us!

  Partner Agencies: Talk to Relationship Manager (agencies@centraltexasfoodbank.org)

  Not Partner Agencies: Talk to Special Populations Team (distributionprograms@centraltexasfoodbank.org)