Reference Document for Link2Feed Client Intake:
CSFP Certification

This document serves as a best-practice guide for utilizing the Client Intake function within Link2Feed to ensure all our sites are using the software in the same way. This allows us to record the most accurate data.

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Updated: 06/30/2020

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Link2Feed Standard of Use

Every user at every partner agency is expected to use the system <u>the same way</u> in order to preserve the integrity of the data. The following instructions should be provided to everyone at your location that will be utilizing Link2Feed to ensure consistent intake practices and system use.

Always begin by searching through existing clients before entering new data.

Within Link2Feed, you can search by name (first, last, or both), date of birth, address, and phone number. If no client match is found, **then** create a new client profile.
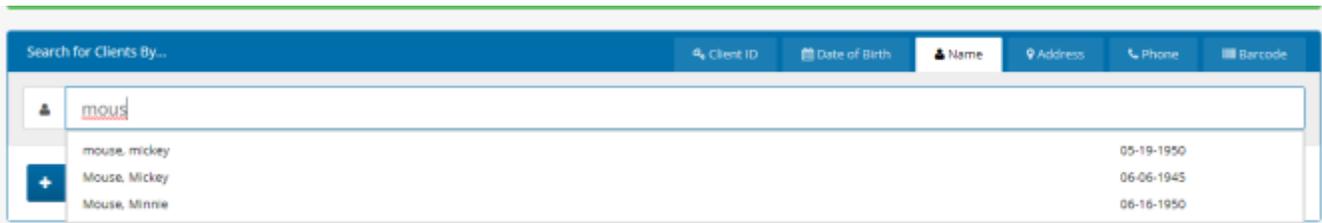
When creating a new client profile, Link2Feed is dynamically comparing the information you enter against information already in the system to avoid duplicate profiles.

CSFP Tab

Link2Feed replaces the CSFP certification (and re-certification) paper forms through the online "CSFP" tab within the client's profile. This tab will only populate if your agency participates in CSFP. There are two steps needed to complete this tab:

- First, make sure the monthly income tab is populated and accurate.
- Second, complete the certification process (covered below).

All of this is based on the information entered within their client intake profile.

Please be sure you are verifying the client's information has not changed with each visit to ensure accuracy here. As a reminder, you should be verifying the client's address, household members, and income each time.

A client must be certified within the CSFP tab prior to receiving a CSFP distribution. To begin the certification process, please click the "CSFP" tab on the client's profile.

The CSFP tab provides an excellent option to manage your active caseload. You may also create profiles for clients that are inactive, on a waiting list, suspended, or deceased. This is based on the extent that you want Link2Feed to be a "one-stop-shop" database.

On the CSFP tab, in the center of the screen, you will see a grid of the **CSFP Eligibility Criteria**. For complete eligibility, all rows must be highlighted green.

If the client's income qualifies for CSFP, the grid will display a green bar where the income falls.

If the client's income is **not** eligible for CSFP, the grid will still display; however, it will display a red bar where the client should fall if eligible.

Household Size	Monthly Income
1	1354
2	1832
3	2311
4	2790
5	3269
6	3748
7	4227
8	4705
Each additional household member	479

If the client does qualify for CSFP, you will need to then certify them in Link2Feed to receive CSFP by clicking the blue "Certify" button at the bottom of the grid.
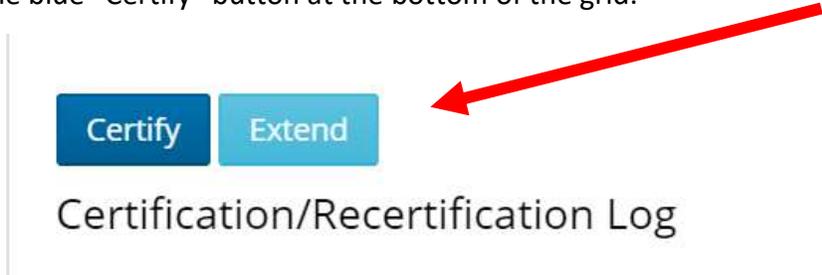
If any of the eligibly criteria are NOT met, when you select certify, you will receive a notification in the upper right-hand corner that says "FAILED." This will prompt you to review the profile and confirm all fields have been properly completed.
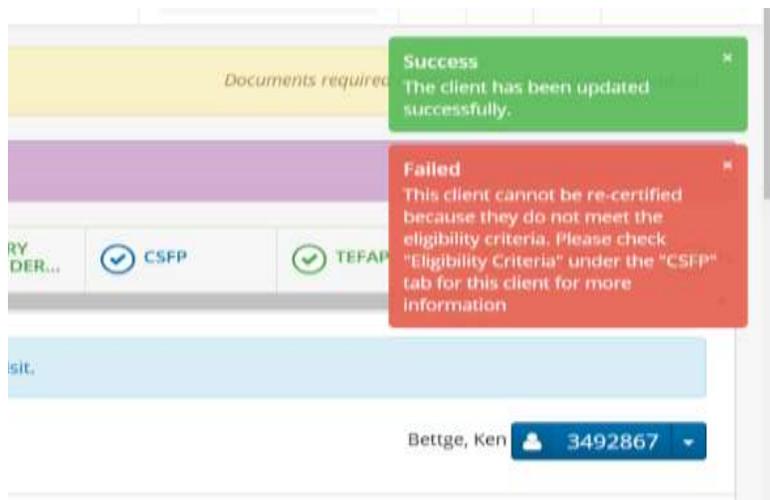
If all edibility criteria is met, when you click on Certify, this will open a new window that displays the CSFP non-discrimination statement and requires the client's signature. The text in this disclaimer is the same text that is available on the paper forms for CSFP. By having the client sign electronically, this eliminates the need for the paper form.

You may record the client's signature in this window by choosing one of the following options from the drop-down:

- **Sign on Screen** – If you are using a computer or touch screen device, the client can sign electronically on the screen via mouse or touchpad with this option. You will need to choose this option, and then click the "Open Signature Canvas" button to record the signature.
- **Hard Copy Signature** – If a client has filled out hard-copy paperwork for this certification period, you may select this option to notate this. Remember, you must keep hard files on hand for a minimum of four years.
- **Scriptel Signature Pad** – If your agency has Scriptel signature pads, you may select this option and prompt the client to sign using the electronic signature pad. No further action is required.
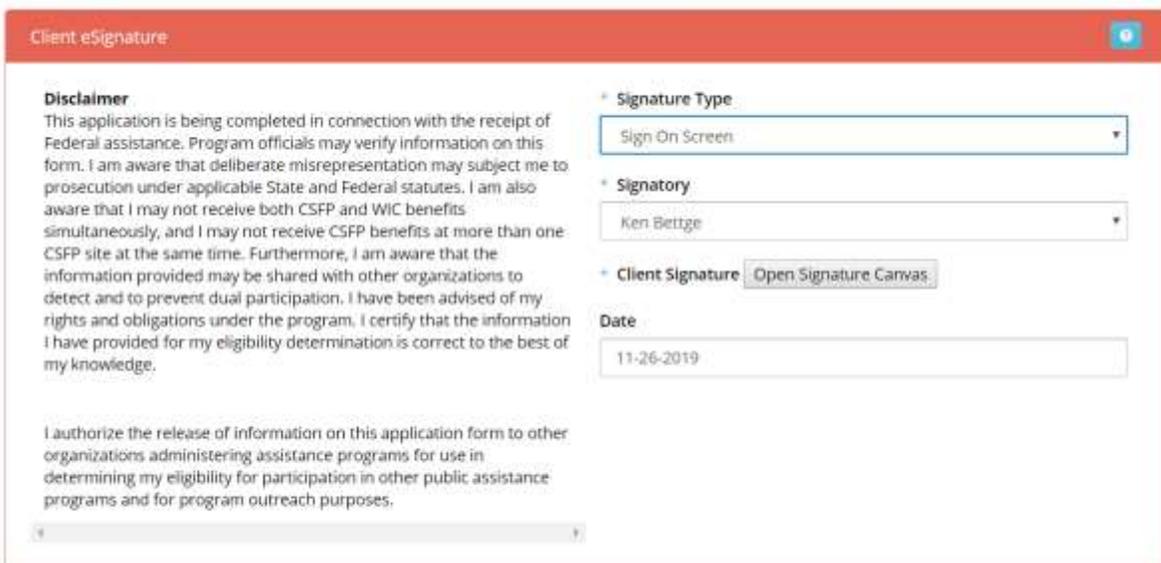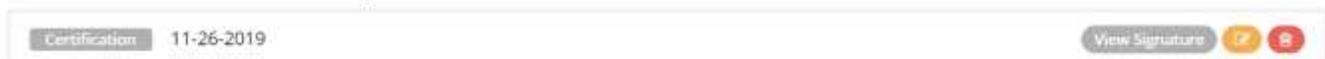

After the client has signed, please remember to click "Save" at the bottom of this screen to save their signature.

Once certified, the certification log will populate with the date and signature of the client.

A banner will also appear at the top of the client's profile with the date of recertification (January 1st).


To Record a new CSFP Visit, on the Services tab, please click the "New CSFP Visit" button to record that the client is receiving a CSFP distribution. This will open a new window with the same client household summary listed at the top.

When recording a CSFP visit, you have the option to note additional items provided:
- Bread
- Produce/Perishables
- Home Delivery
- Household Items

At the bottom of the CSFP visit screen, there is an additional area for the client to sign electronically using a touchscreen, a mouse, or a signature pad. This replaces the hard-copy paper log that your agency used previously to record CSFP distributions, although there is still the option to retain hard-copy paper signatures. If you **do not** have your client sign electronically, you **must** keep your paper records for at least four years.
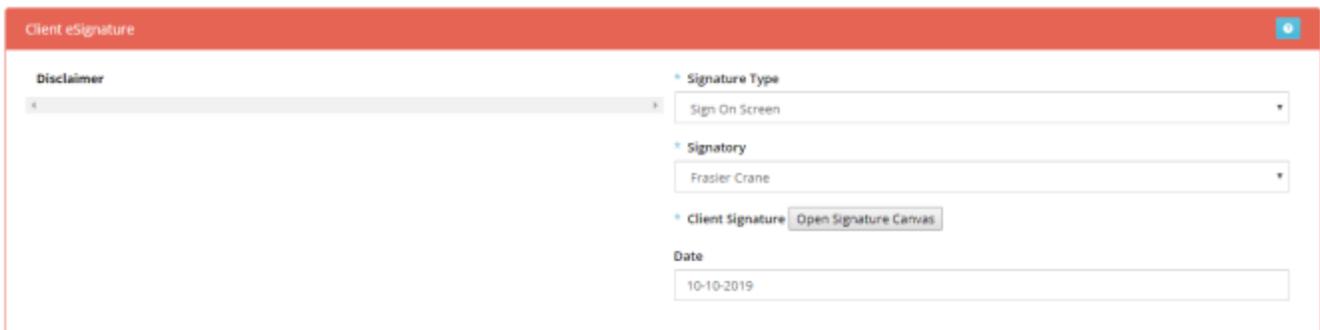
To finish recording this visit, please be sure to click the "Save" button at the bottom of this screen.

Re-Certification (every January)
Every January, Link2Feed will automatically post a banner at the top of the client's profile that will prompt you to review their information for re/certification extension. The re/certification extension process is the same as the certification process through the CSFP tab.