Link2Feed CSFP Certification and Services Log

How to Certify or Extend Certification
Every CSFP neighbor must have a full profile within Link2Feed to record their CSFP status. Once you have completed the profile, you may click the "CSFP" tab at the top to open their CSFP profile.

At the top of this page, there is the section to enter the CSFP ID, Status, Enrollment Date and confirm the neighbor has received documentation. The location will default to your organization's name.

Status options include:
- **None –** This is the default option for neighbors who have not been certified or do not qualify.
- **Active –** A neighbor has been certified and picks up every month.
- **Inactive –** A neighbor no longer picks up and may be termed from the program.
- **Waiting List –** A neighbor is approved and is on the wait list.
- **Suspended –** The default option for neighbors who have not picked up in 2 months.
- **Deceased –** A neighbor has passed on.
- **Closed –** An optional status if it applies to your organization's process.

Once you update the status to "Active" or "Waiting List," the system will require you to input their Enrollment Date for the program. You must also confirm that they were notified of their eligibility and the date the notification occurred.

CSFP Information

See Client in View Mode

Client Information

* CSFP ID	* Location	* Status
138561	TRAINING: TEFAP Pantry w/ CSFP ⌄	Active ▾

* Enrollment Date		Last Status Change Date
12-16-2021		12-14-2021

Documentation

* Eligibility Notification Letter Sent

◉ Yes
◯ No

* Eligibility notification letter date

12-16-2021

To add a proxy – or someone who may pick up on behalf of the eligible client – click the "Add Proxy Signatory" button.

Proxy Signatories

+ Add a Proxy Signatory

This will open an option to record the name and phone number of the proxy. The phone number is optional.

Proxy Signatories

* Name	Phone	
Frodo Baggins	(555) 555-5555	🗑

+ Add a Proxy Signatory

A neighbor may have up to **5** proxies listed on their account at one time. To remove a proxy from the account, click the trash can icon to the far right of their name.

Once you have this information filled out, scroll to the bottom and click the "Save Changes" button to update the system before continuing.

↺ Save & Previous	✔ Save Changes	↻ Save & Next

At the bottom of this page, there is the eligibility criteria chart. The system will populate this chart based off of the profile information entered for the neighbor, so be sure to keep their profile up to date.

Eligibility Criteria Save Changes to update criteria

Minimum Age	60
Has CSFP ID	Yes
Has Enrollment DATE (or is on Waiting List)	Yes
Status is Active/Waiting List	Yes
Requires Certification/Recertification	Yes
Has already visited this calendar month	No

Household Size	Monthly Income
1	1396
2	1888
3	2379
4	2871
5	3363
6	3855
7	4347
8	4839
Each additional household member	492

This chart will notify you of any changes as well as if the neighbor qualifies for the program but has not yet been entered into the system.
To certify or extend certification for a neighbor, click the "Certify" or "Extend" button below the chart as is appropriate.

Certify   Extend

Certification/Recertification Log

This will open a pop-up window to collect signatures. The language in this window is the same as the paperwork neighbors used to sign.

On the bottom left, you may record their response to the language by clicking the appropriate circle next to "Yes" or "No."

On the right, you may record the neighbor signature. Under "Signature Type," you may choose between:

- **Sign On Screen –** This records the signature electronically by opening the signature canvas; neighbors may sign by holding down the left mouse button, or by using a stylus on a touch screen device.
- **Hard Copy Signature –** This option notates that the neighbor has signed the traditional paperwork. For this option, be sure to modify the date to the date the neighbor signed the paper.
- **Scriptel e-Signature Pad –** This option allows the system to collect the signature via the provided signature pad.

Under "Signatory," choose either the neighbor or the appropriate proxy if they are completing certification or extension for the neighbor. The date will default to today's date; it only needs to be modified if the neighbor signed a hard-copy paper on an alternate date.

At the bottom of this window is the space for the intake worker's signature. The same options exist for this as for the neighbor's signature above.
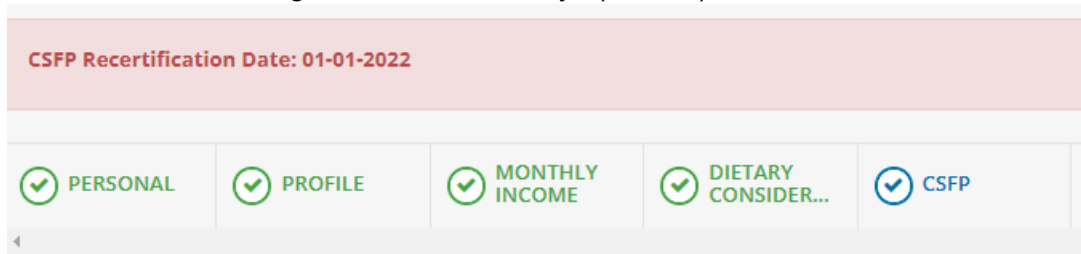

When finished, click "Save."

This will take you back to the original CSFP tab. The system will keep a record of certification and extensions, as well as the date each was completed and the option to view the signature within the system.

Certification/Recertification Log

| Certification | 12-16-2021 | | View Signature |

At the top of the CSFP tab, a banner will now appear to notate the neighbor is certified. This banner will change color:

- **Blue –** The neighbor has a current certification.
- **Yellow –** The neighbor is within 60 days of extension.
- **Red –** The neighbor is within 30 days (or after) of extension.

CSFP Recertification Date: 01-01-2022

| ✓ PERSONAL | ✓ PROFILE | ✓ MONTHLY INCOME | ✓ DIETARY CONSIDER... | ✓ CSFP |

How to Create a CSFP-Specific Note for a Neighbor Profile

To create a CSFP-specific note for a neighbor, click on the "Notes" tab.

| ✓ CSFP | ✓ SERVICES | ✓ NOTES |
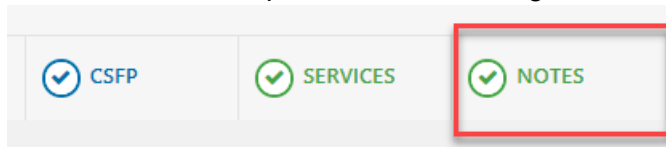
To create a note, click on the blue "New Note" button on the right side of the screen. This will open a pop-up window to create the note. The system will automatically record the date, time and person recording the note.

Edit a Note

☐ Mark this note as an alert   ☐ Mark this note as private (show to my organization only)
☐ CSFP Only Note

✗ Cancel   ✓ Save

Documents required at next visit   Record Client Notified

Baggins, Bilbo 👤 138561 ▾

+ New Note

09-22-2021 @ 11:51 AM
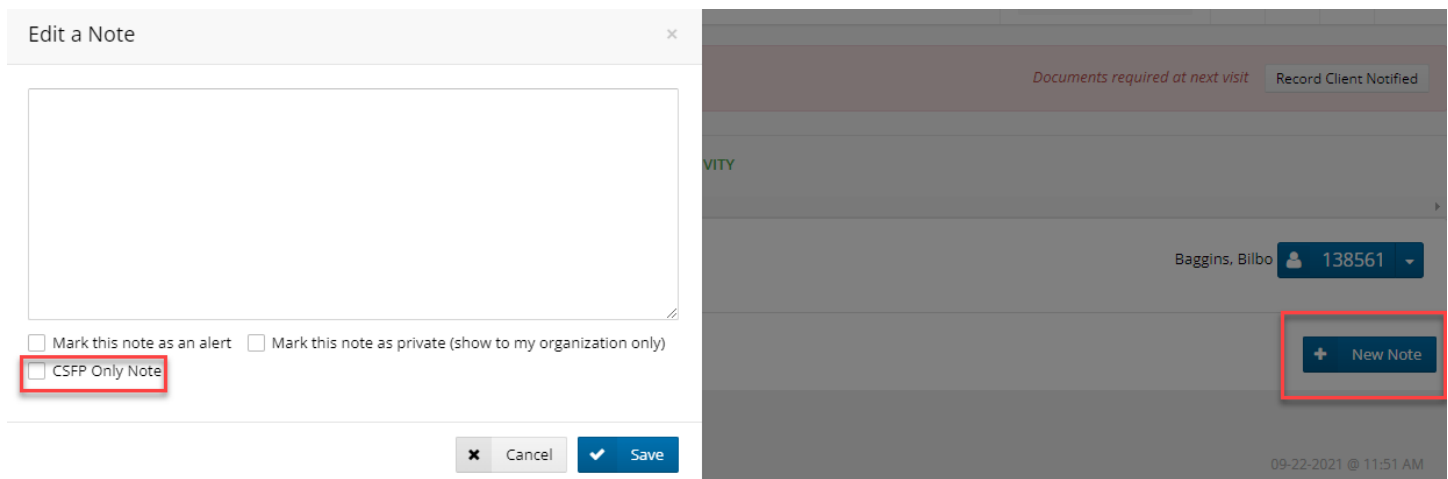
The options at the bottom of this window include:

- **Mark as an alert –** This will create a banner at the top of the neighbor's profile with this information.
- **Mark as private –** This will limit the notation to your agency only and hide it from network partners.
- **CSFP Only –** This limits the note to the CSFP tab.

Be sure to click the "CSFP Only Note" option at the bottom of the Note box and then click "Save."

After creating the note, it will display on the "Notes" tab, listing the creator, date, and time the note was created. There will also be the options to Edit or Delete the note as needed.

The note will also display on the "CSFP" tab at the bottom of the page.

How to Record a CSFP Box Pickup

To record a client picking up their CSFP box, click on the "Services"

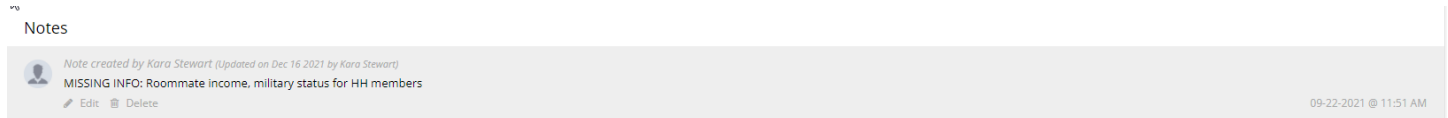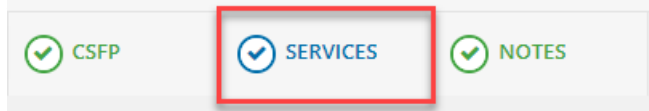On this page, you will see a Household Summary that details the household size, age groups present in the household, the number of visits a neighbor has had to our partner network within the last 30 days (**not** only your agency) and any eligible programs or dietary considerations.
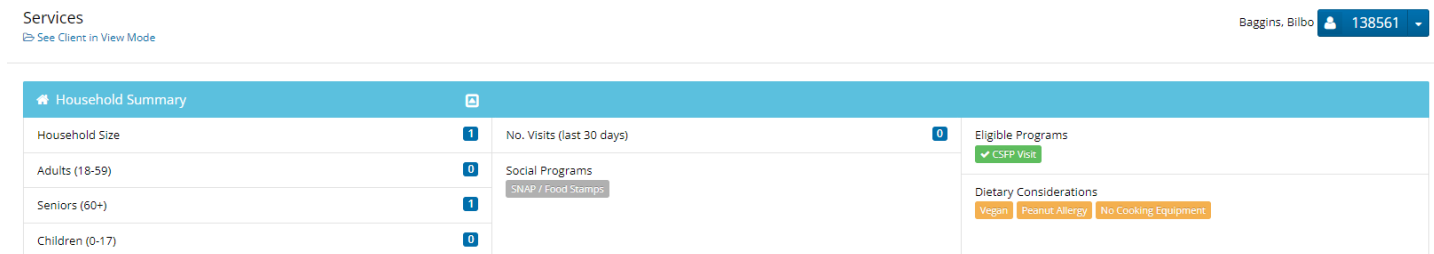
Below that, you will have a "New CSFP Visit" button. If the button is greyed out, the neighbor is either not certified, not eligible or not active to receive CSFP.
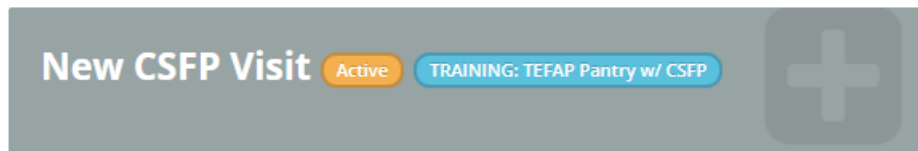
If the neighbor is eligible and has been certified, the button will be blue and notate "Eligible," their status and the agency they are certified to pick up from.
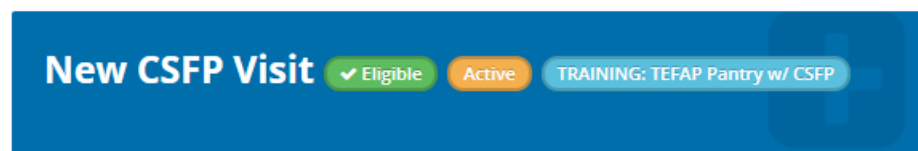
When the button is blue, click it to record a pick-up. This will open a new screen that will contain the Household Summary again at the top. Under the "General Visit Details," the date will default to today's date. Under "Who from the household is receiving services for this visit?" the appropriate neighbors will automatically display and be selected.

You should not need to make any changes to these boxes.

New CSFP Visit
Baggins, Bilbo 👤 138561 ▾
🖙 See Client in View Mode

🏠 Household Summary   🏠

Household Size	1	No. Visits (last 30 days)	0	Eligible Programs

Household Size — 1
No. Visits (last 30 days) — 0
Eligible Programs
✔ CSFP Visit

Adults (18-59) — 0
Social Programs
SNAP / Food Stamps

Dietary Considerations
Vegan Peanut Allergy No Cooking Equipment

Seniors (60+) — 1

Children (0-17) — 0

General Visit Details   ❓

* Date
📅 12-16-2021   ☐ Double Distribution

Who from the household is receiving services for this visit?   ☑ Select All ☐ De-select All ❓

☑ Bilbo Baggins

Below that, there is an **optional** "Food & Items / Services Provided" box to record additional details about items this neighbor received during this visit. The "Provide Details" box is a text box to add any additional detail regarding the items needed. While this information is optional, it can be used to record and run reports on later if needed.

Food & Items / Services Provided   ☑ Select All ☐ De-select All ❓

Foods Provided
☐ Bread   ☐ Household Items (light bulbs, toilet paper, etc)   ☐ Produce / Perishables (# of items)

Provide details of other Food Items supplied on this visit
[   ]

Items Provided
☐ Home Delivery

Provide details of the other Non-Food items supplied on this visit
[   ]

Next, you will have the option to add a note to this visit. This note is specific **to this visit**, not just the neighbor itself (as the Notes tab previously covered was). For example, if Mr. Baggins informed the intake personnel that he would not be able to pick up next month due to surgery, it could be notated here.

Additional Notes / Information   ❓

[   ]

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

Finally, there is the signature box, which replaces the paper form neighbors previously signed when picking up their box.
On the right, you may record the neighbor signature. Under "Signature Type," you may choose between:

- **Sign On Screen –** This records the signature electronically by opening the signature canvas; neighbors may sign by holding down the left mouse button, or by using a stylus on a touch screen device.
- **Hard Copy Signature –** This option notates that the neighbor has signed the traditional paperwork. For this option, be sure to modify the date to the date the neighbor signed the paper.
- **Scriptel e-Signature Pad –** This option allows the system to collect the signature via the provided signature pad.

Under "Signatory," choose either the neighbor or the appropriate proxy if they are completing certification or extension for the neighbor. The date will default to today's date; it only needs to be modified if the neighbor signed a hard-copy paper on an alternate date.

When finished, click "Save."

This will return you to the "Services" tab. At the bottom of this page, you will now see a record of service, including the date, organization recording service, type of service and any additional details.