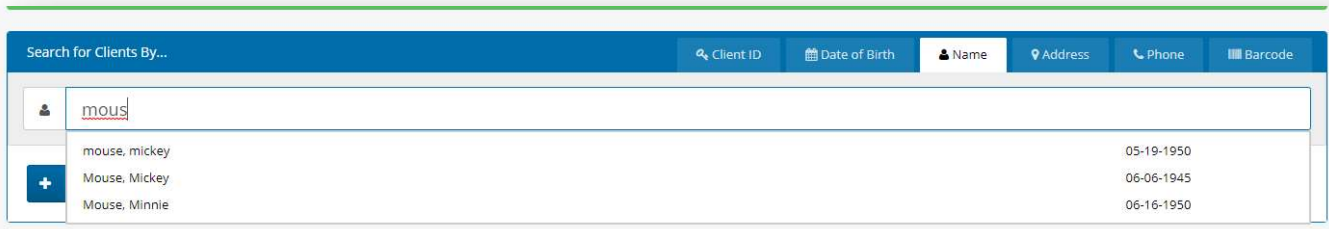


Link2Feed Client Intake Guide: Creating Households and Linking Members

Revised 7/05/2023

Every user at every partner agency is expected to use the system the same way 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. You may also scan their barcode if they have one assigned. If no client match is found, **then** create a new client profile.



Search for Clients By...

Client ID Date of Birth Name Address Phone Barcode

mouse

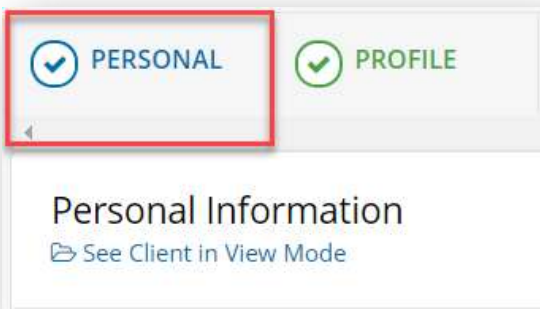
mouse, mickey	05-19-1950
Mouse, Mickey	06-06-1945
Mouse, Minnie	06-16-1950

Entering New Clients

When entering a new client profile, it must be completed within 72 hours or the information will be removed from the system. A profile is not considered “complete” until the first 4 tabs (Personal, Profile, Monthly Income, and Dietary Considerations) are completed and the “Services” tab is accessed.

1. Personal Tab

This is where you will enter the Head of Household’s information, including information on the members in their household.

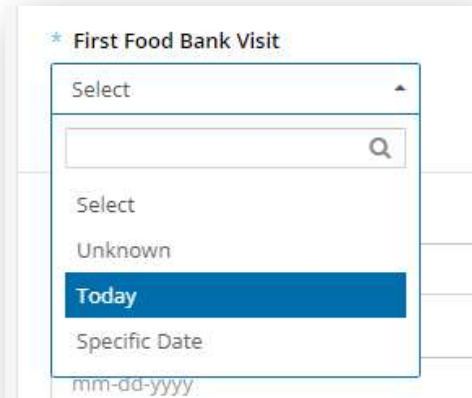


PERSONAL PROFILE

Personal Information

See Client in View Mode

Under **First Food Bank Visit**, please select “Today” if doing live client intake, or “Specific Date” with the date the client filled out the paperwork. This is a required field within Link2Feed that we are unable to remove, it’s best to think of this as the first visit since using Link2Feed.



A screenshot of a dropdown menu titled “* First Food Bank Visit”. The menu is open, showing a search bar at the top with a magnifying glass icon. Below the search bar, the word “Select” appears twice. The options listed are “Unknown”, “Today” (highlighted in blue), and “Specific Date”. At the bottom of the menu, the date format “mm-dd-yyyy” is visible.

The **Last Name** and **First Name** boxes are dynamic, so you can include suffixes such as Jr or nicknames and middle names by entering a space between the last or first name and what you wish to add.

If a client is uncertain regarding their **date of birth**, you may check the “Date of Birth Estimated” box below the date of birth field, but a date must still be entered. The age will automatically populate based on the date of birth entered.



A screenshot of a form with several fields. On the left, there is a “* Last Name” field containing “Baggins” and a “* Date of Birth” field containing “04-05-1950”. To the right of the date field is an “Age” field containing “72”. On the right side, there is a “* First Name” field containing “Bilbo” and a “* Gender Identity” dropdown menu with “Male” selected. At the bottom left, there is a checkbox labeled “Is Date of Birth Estimated?” with a red arrow pointing to it.

The **gender** drop-down allows you to select the appropriate option notated by the client.

Marital Status is required and allows you to select the appropriate option notated by the client.



A screenshot of the “* Marital Status” section of a form. It contains nine radio button options arranged in three columns: “Common-Law”, “Divorced”, “Married”, “Separated”, “Single” (which is selected), “Widowed”, “Didn't Ask”, “Don't Know”, and “Prefer Not to Answer”.

When entering the **address**, Link2Feed will begin searching valid addresses that match against what the United States Postal Service has on file. **Please be sure the address that populates exactly matches what the client provides to you**, as other state addresses will begin to populate as well. If the address cannot be found in the system, you can still save it; you will just need to enter it manually.

* Street

3355 S Pur|

3355 S Purdue Ave, Oklahoma City, OK, USA
3355 S Purple Sage Dr, Chandler, AZ, USA
3355 Purdue St, Oklahoma City, OK, USA
Oklahoma City

* County * State * Zip Code

Oklahoma Oklahoma 73112

If your client identifies as having **no fixed address**, please check the box indicating “No Fixed Address.” You may also select “Prefer Not to Answer” if appropriate. This will remove the option to enter an address. In either instance, you will still need to identify the **Housing Type** below.

No Fixed Address Prefer Not to Answer

* Housing Type

Emergency Shelter / Mission / Transitional Public (Social) Housing Other
 Evacuee Unhoused Didn't Ask
 Own Home With Family / Friends Don't Know
 Private Rental Youth Home / Shelter Prefer Not to Answer

Email address and Phone number are not required fields. If you do collect this information, click “Add” to enter the information; there is no limit to how many email addresses or phone numbers you may add for a client. Use the circle on the far left of the entry to notate the Primary contact method.

Email Addresses

+ Add

Phone Numbers

(405) 248-6959 Ext Home

+ Add

ID Type is not required and is solely used to assign a barcode to the client when your agency begins that process. *Please see the Equipment Guide for details on assigning barcodes.*

The screenshot shows a form section with the following elements:

- ID Type:** A dropdown menu currently set to "Link2Feed Barcode ID".
- Confirmation:** A text input field containing the number "531746".
- Buttons:** A blue "+ Add" button on the left, an orange "Scan Barcode" button with a barcode icon, and a trash icon on the right.

Ethnicities is a required section. There is no limit to the number of ethnicities a client may choose.

The screenshot shows the "Ethnicities" section with the following checked options:

- American Indian / Native American
- Black / African American
- Hispanic / Latino
- White / Anglo

Other options include: Alaska Native / Aleut / Eskimo, Asian, Middle-Eastern / North-African, Pacific Islander, None, Didn't Ask, Don't Know, and Prefer Not to Answer.

Household Members

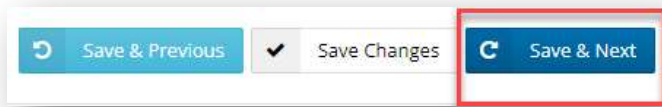
Please enter **any** member associated with your client's household, even if another household may be claiming them. L2F provides a feature to note that members are shared with multiple households. Similar to creating a Head of Household profile, if the information being entered matches a profile already in the system, you will receive the Possible Duplicate pop-up. *Both of these instances are covered in the appropriate "Managing Household Members" and "Managing Potential Duplicates" guides.*

If the client is uncertain of a member's date of birth, please use the "Date of Birth is Estimated" checkbox to indicate this.

The screenshot shows the "Household Member Info" form with the following details:

- Last Name:** Input field with "stewart".
- First Name:** Input field with "eli".
- Date of Birth:** Input field with "05-01-2023".
- Age:** Input field with "0".
- Gender Identity:** Dropdown menu set to "Male".
- Relationship:** Dropdown menu set to "Child".
- Is Date of Birth Estimated?:** Unchecked checkbox.
- Ethnicity:** Multiple checkboxes, with "Middle-Eastern / North-African" checked.
- ID Type and Confirmation:** Section at the bottom with a "+ Add" button.
- Buttons:** "Cancel" and "Save Changes" buttons at the bottom right.

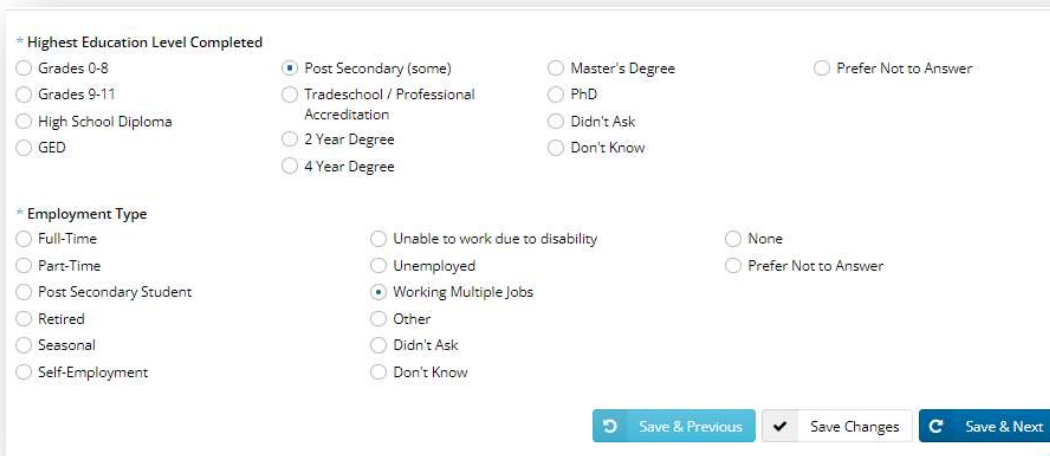
When you have finished adding household members, they will populate in the profile with a base summary of their information. Click “Save & Next” to continue entering the client’s profile. ***Use “Save & Next”** wherever possible to ensure information is saved.



2. Profile Tab

This information pertains **only** to the Head of Household. The Education and Employment information **is required** to save a client’s profile.

When finished, click “Save & Next” to continue to the next page of the client profile.



* Highest Education Level Completed

Grades 0-8

Post Secondary (some)

Master's Degree

Prefer Not to Answer

Grades 9-11

Tradeschool / Professional Accreditation

PhD

High School Diploma

2 Year Degree

Didn't Ask

GED

4 Year Degree

Don't Know

* Employment Type

Full-Time

Unable to work due to disability

None

Part-Time

Unemployed

Prefer Not to Answer

Post Secondary Student

Working Multiple Jobs

Retired

Other

Seasonal

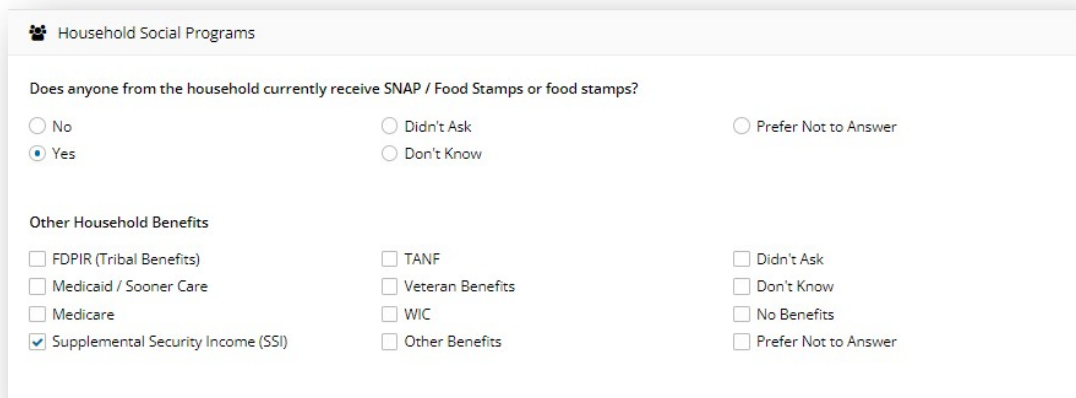
Didn't Ask

Self-Employment

Don't Know

3. Monthly Income

Household Social Programs references any additional benefit programs anyone in the household may be enrolled in. This is a required question and can be used to help determine additional resources the household may benefit from.



Household Social Programs

Does anyone from the household currently receive SNAP / Food Stamps or food stamps?

No

Yes

Didn't Ask

Don't Know

Prefer Not to Answer

Other Household Benefits

FDPIR (Tribal Benefits)

TANF

Didn't Ask

Medicaid / Sooner Care

Veteran Benefits

Don't Know

Medicare

WIC

No Benefits

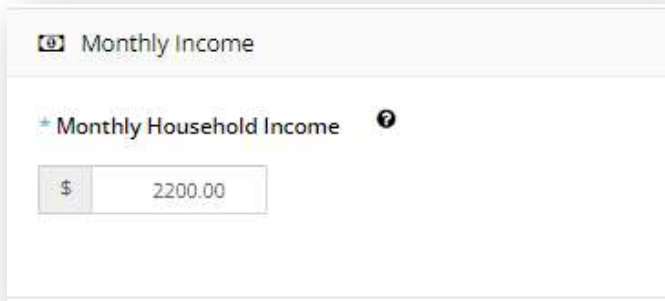
Supplemental Security Income (SSI)

Other Benefits

Prefer Not to Answer

Monthly Household Income will be used to determine TEFAP eligibility, and to provide better data on the current needs of the household. If your agency distributes USDA commodities, you will have a separate TEFAP tab. *Please note that this is the income amount for the entire household on a monthly basis.*

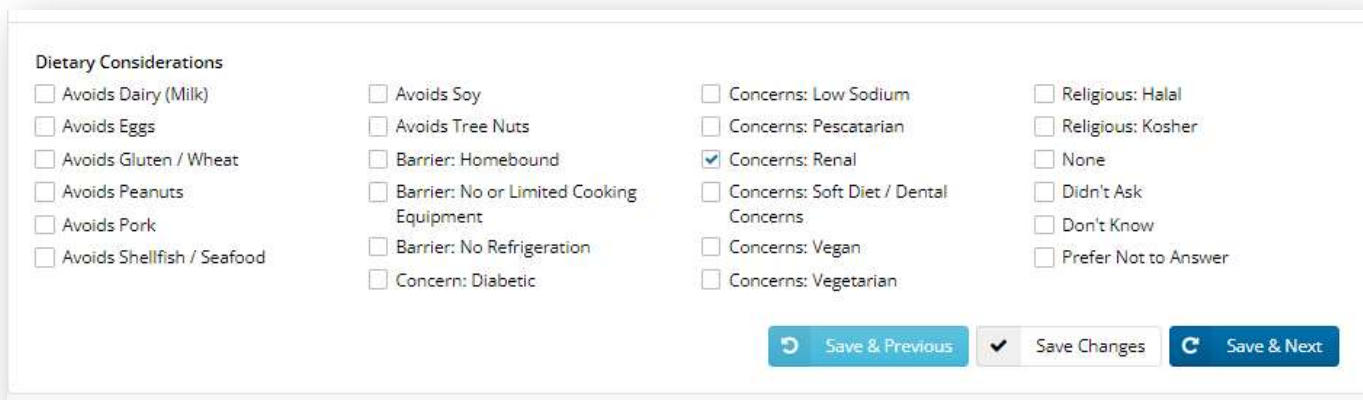
- As a reminder, **Oklahoma is a self-declare state**, meaning proof of income is **not** required and **cannot** be requested.
- This is only meant to track **gross** income; please **do not** count other benefits such as SNAP as a source of income. SNAP is awarded based on income and **cannot** be included as income.



The screenshot shows a form titled "Monthly Income". Below the title, there is a section labeled "* Monthly Household Income" with a help icon. A text input field contains the value "2200.00" with a dollar sign (\$) to its left.

4. Dietary Considerations Tab

This tab is meant to list any dietary preferences, concerns or barriers a client or their household member(s) may have. Click "Save & Next" to be taken to the next tab.



The screenshot shows the "Dietary Considerations" tab with a grid of checkboxes. The "Concerns: Renal" checkbox is checked. At the bottom, there are three buttons: "Save & Previous", "Save Changes" (which is active), and "Save & Next".

Dietary Considerations			
<input type="checkbox"/> Avoids Dairy (Milk)	<input type="checkbox"/> Avoids Soy	<input type="checkbox"/> Concerns: Low Sodium	<input type="checkbox"/> Religious: Halal
<input type="checkbox"/> Avoids Eggs	<input type="checkbox"/> Avoids Tree Nuts	<input type="checkbox"/> Concerns: Pescatarian	<input type="checkbox"/> Religious: Kosher
<input type="checkbox"/> Avoids Gluten / Wheat	<input type="checkbox"/> Barrier: Homebound	<input checked="" type="checkbox"/> Concerns: Renal	<input type="checkbox"/> None
<input type="checkbox"/> Avoids Peanuts	<input type="checkbox"/> Barrier: No or Limited Cooking Equipment	<input type="checkbox"/> Concerns: Soft Diet / Dental Concerns	<input type="checkbox"/> Didn't Ask
<input type="checkbox"/> Avoids Pork	<input type="checkbox"/> Barrier: No Refrigeration	<input type="checkbox"/> Concerns: Vegan	<input type="checkbox"/> Don't Know
<input type="checkbox"/> Avoids Shellfish / Seafood	<input type="checkbox"/> Concern: Diabetic	<input type="checkbox"/> Concerns: Vegetarian	<input type="checkbox"/> Prefer Not to Answer

Once you have completed these four intake tabs and are able to access the "Services" tab, your client's profile is considered complete. You will now be able to search for this client as well as any of their household members.

If you are a TEFAP or CSFP agency, the appropriate program certification tab will populate; otherwise, you will be taken to the "Services" tab. *Information on certification is located in the TEFAP or CSFP guides as appropriate.*

Linking Household Members and Managing Potential Duplicates

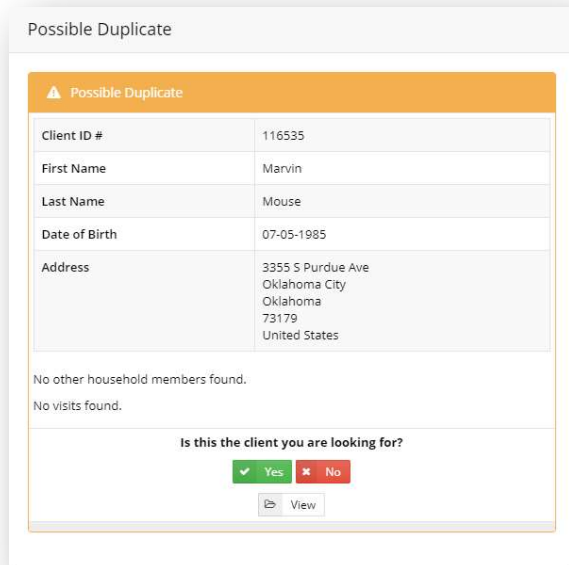
When creating a new client profile, Link2Feed is dynamically comparing the information you enter against information already in the system.

In instances where separate households are claiming a single client, it is possible to associate the client with each household to avoid duplication. Most commonly, this will become evident when a new client entering information during intake lists a member that is already within the Link2Feed system. **When this happens, a “Possible Duplicate” pop-up will appear.**

- First, verify whether the information entered matches the possible duplicate listed and is in fact the same person. You may do this by clicking the “See More” button.



- This will generate a new window with additional information for you to compare against the information entered for the potential duplicate profile.

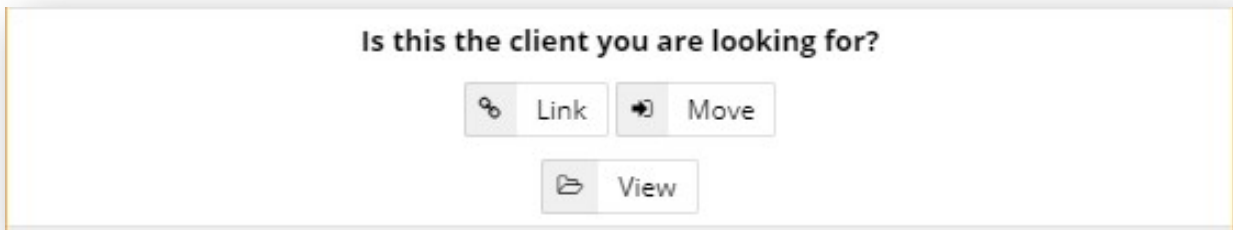


- **If the information does not match**, please click the “No” button to dismiss the duplicate. This instance of possible duplication will still be recorded and can be reviewed or modified later, if necessary.

- **If the information matches**, please click the “Yes” button to confirm that this is the same person.

If this client is associated with another household, this will populate a new option:

- Choose “**Link**” if this member belongs to more than one household. This may be the case for grandparents who take care of grandchildren during the summer, other custody arrangements, et cetera.
- Choose “**Move**” if the member has completely vacated the other household and now solely resides in the household being entered.



As you may notice, the system **does not** allow for duplicate accounts to be created. Every instance of possible duplication, and possible duplications that have been marked as dismissed, are recorded for review by your agency manager and Regional Food Bank. This is to help ensure and maintain the integrity of unduplicated data regarding the clients we serve.