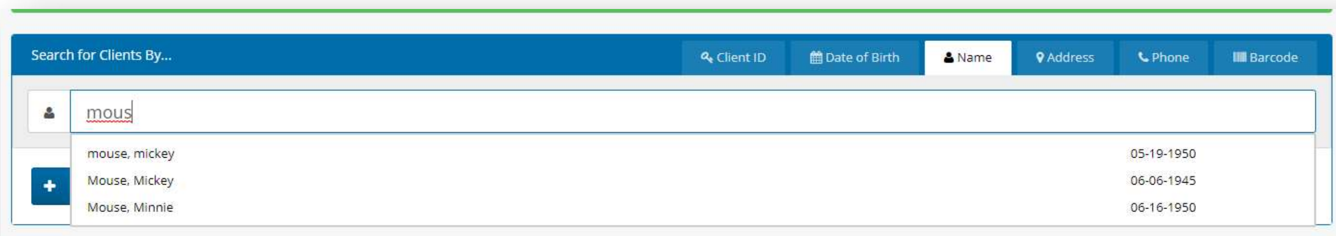
Link2Feed Client Intake Guide: Creating Households and Linking Members

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.

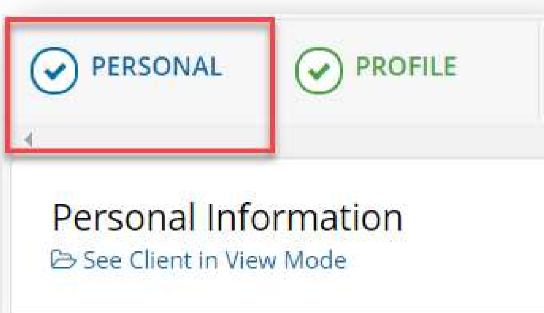


Entering New Clients

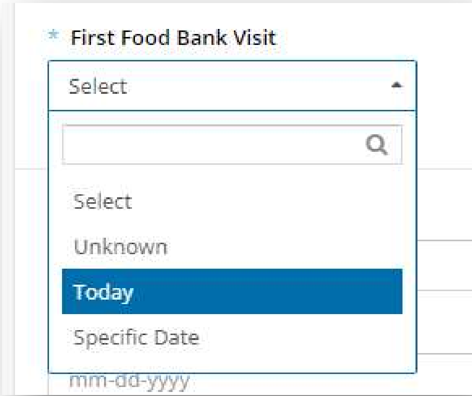
<u>When entering a new client profile, it must be completed within 72 hours or the information will be removed from the system</u>. A profile is not considered "complete" until the first 4 tabs (Personal, Profile, Monthly Income, and Dietary Considerations) are completed and the "Services" tab is accessed.

1. Personal Tab

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



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.



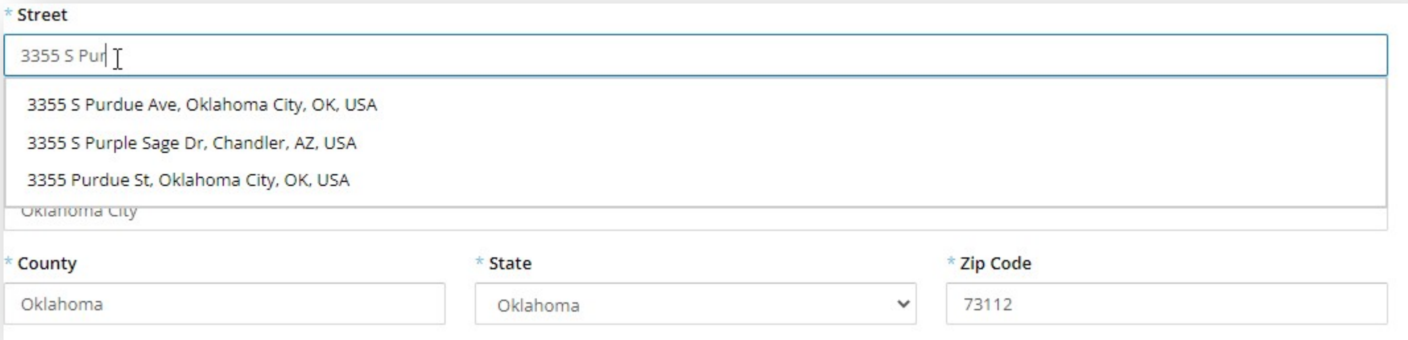
The **Last Name** and **First Name** boxes are dynamic, so you can include suffixes such as Jr or nicknames and middle names by entering a space between the last or first name and what you wish to add.

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 <u>date must still be entered</u>. The age will automatically populate based on the date of birth entered.

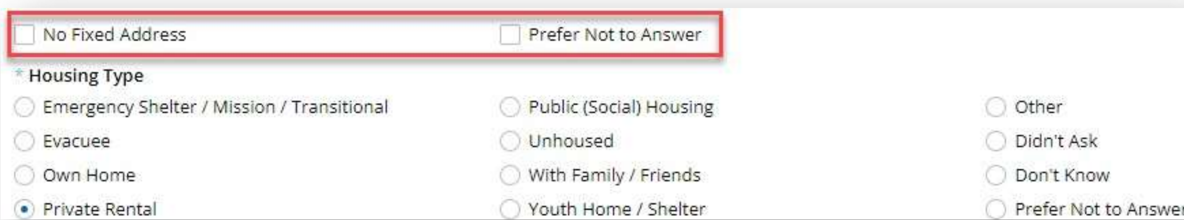
The **gender** drop-down allows you to select the appropriate option notated by the client.

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

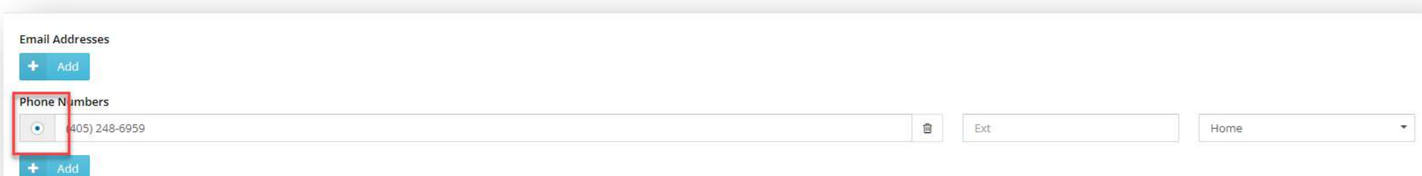
When entering the **address**, Link2Feed will begin searching valid addresses that match against what the United States Postal Service has on file. **Please be sure the address that populates exactly matches what the client provides to you,** as other state addresses will begin to populate as well. If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



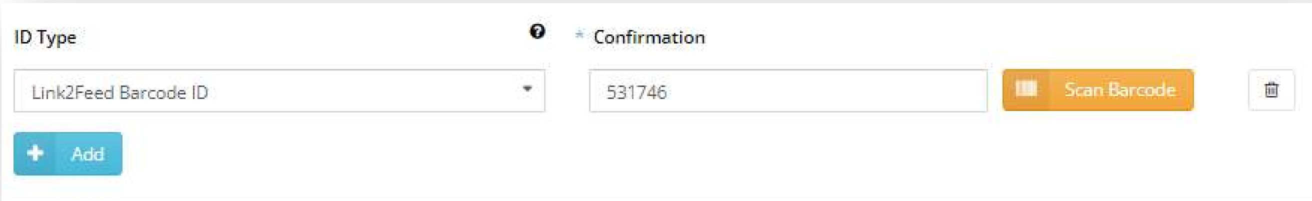
If your client identifies as having **no fixed address**, please check the box indicating "No Fixed Address." You may also select "Prefer Not to Answer" if appropriate. This will remove the option to enter an address. In either instance, you will still need to identify the **Housing Type** below.



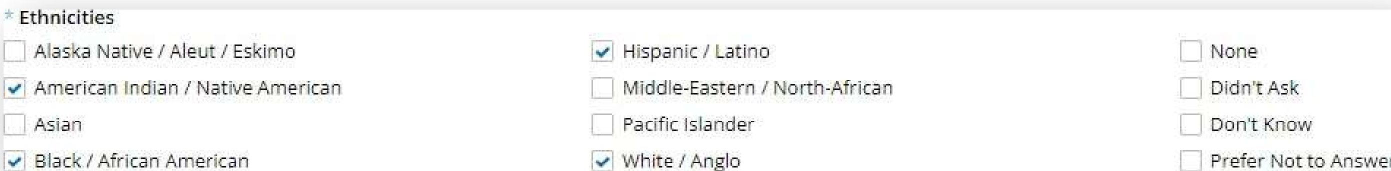
Email address and Phone number are not required fields. If you do collect this information, click "Add" to enter the information; there is no limit to how many email addresses or phone numbers you may add for a client. Use the circle on the far left of the entry to notate the Primary contact method.



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.*



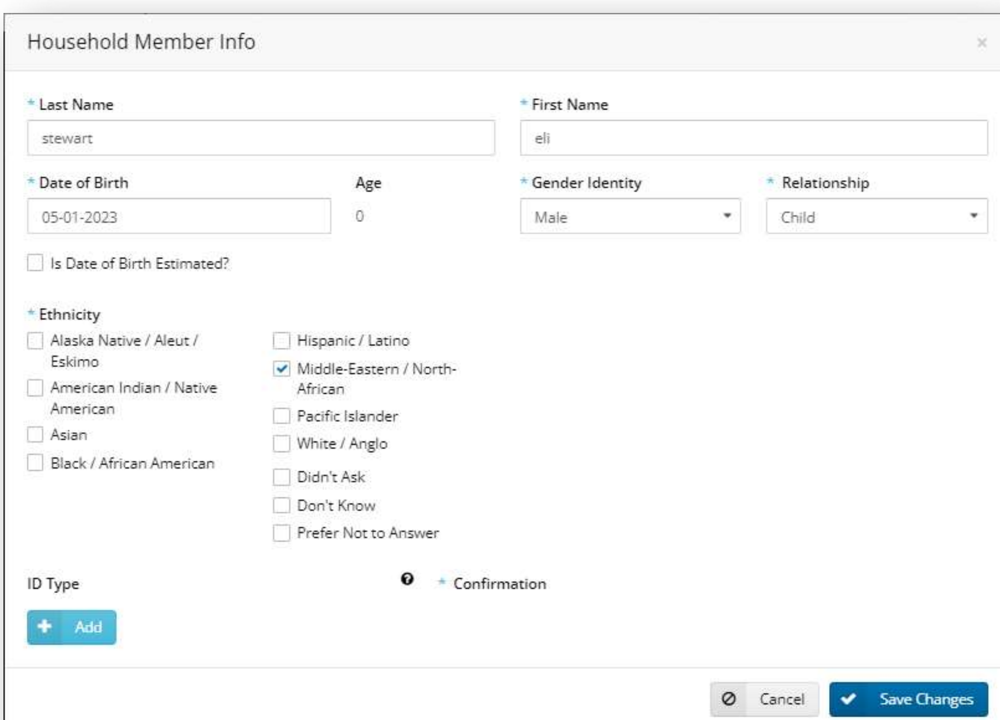
Ethnicities is a required section. There is no limit to the number of ethnicities a client may choose.



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.

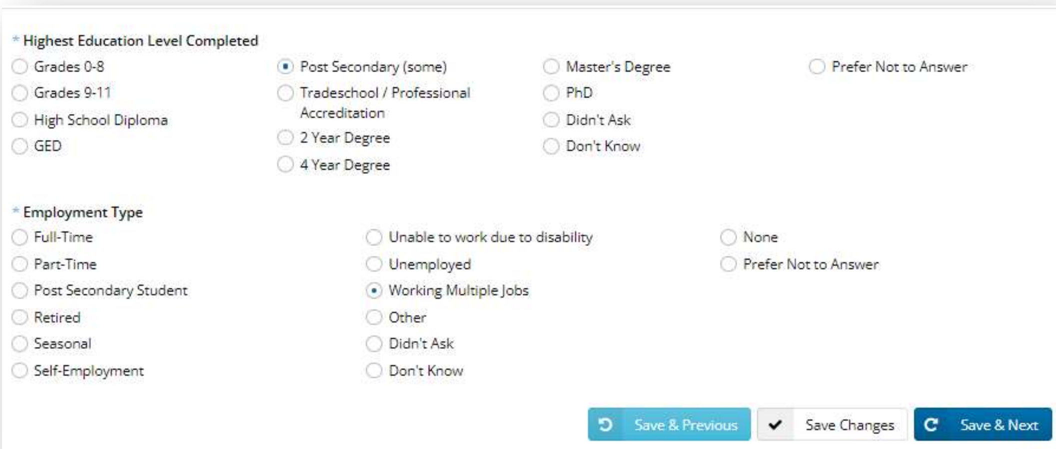


When you have finished adding household members, they will populate in the profile with a base summary of their information. Click “Save & Next” to continue entering the client’s profile. ***Use “Save & Next”*** wherever possible to ensure information is saved.

2. Profile Tab

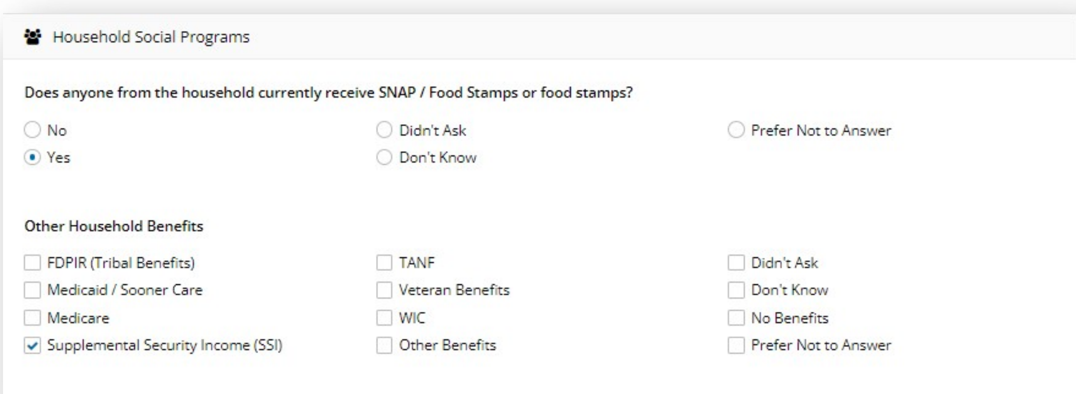
This information pertains **only** to the Head of Household. The Education and Employment information **is required** to save a client’s profile.

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



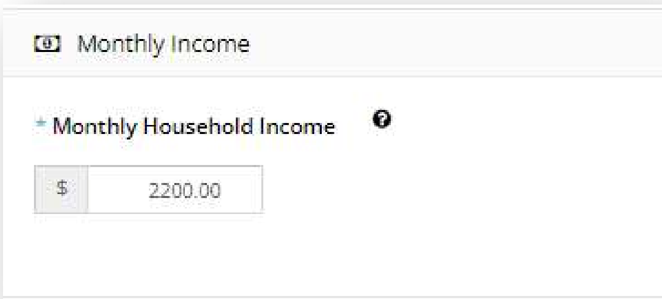
3. Monthly Income

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.



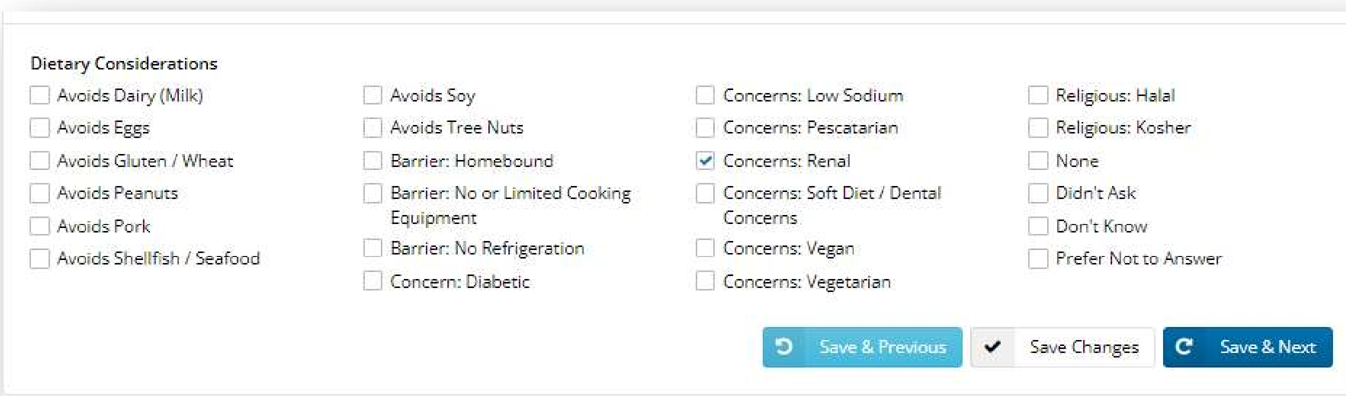
Monthly Household Income will be used to determine TEFAP eligibility, and to provide better data on the current needs of the household. If your agency distributes USDA commodities, you will have a separate TEFAP tab. *Please note that this is the income amount for the entire household on a <u>monthly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



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.



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.*

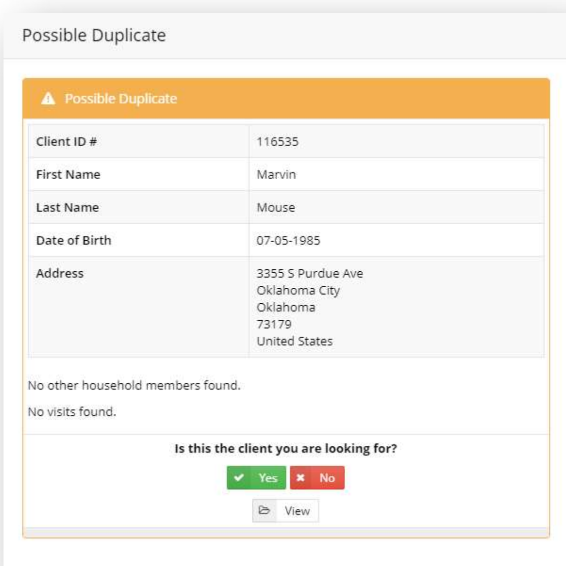
Linking Household Members and Managing Potential Duplicates

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.

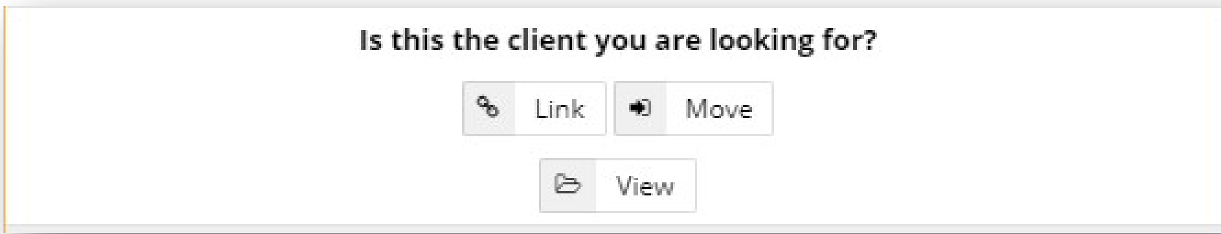


    - **If the information does <u>not</u> match,** please click the "No" button to dismiss the duplicate. This instance of possible duplication will still be recorded and can be reviewed or modified later, if necessary.

- **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.