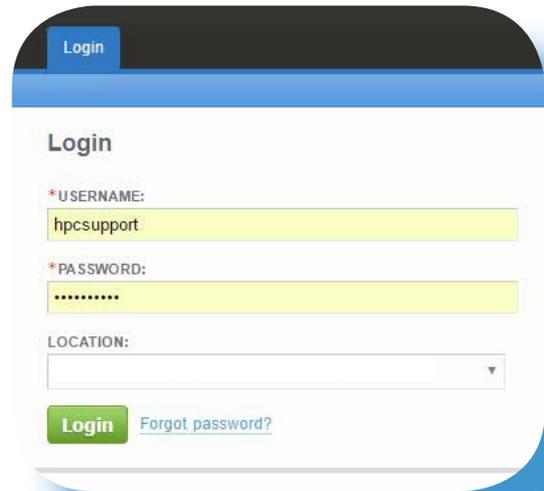


FoodBank MANAGER REFRESHER FOR CLIENT INTAKE

Login to FoodBank Manager using your Username and Password.



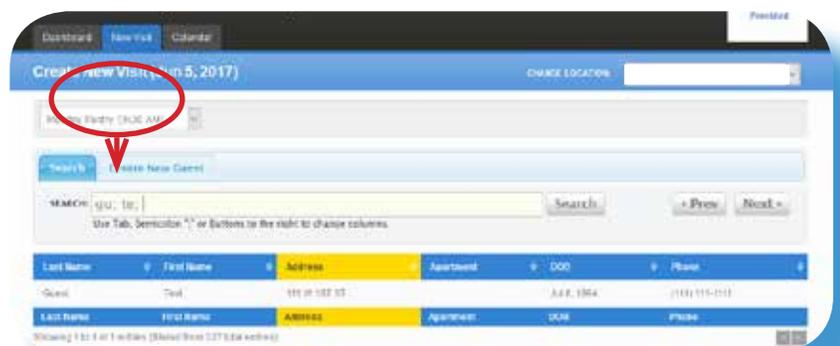
Click in the 'New Visit' tab and 'Select an Outreach'. Your selection for the Outreach is easily identified by day of the week.



Search for a guest by:
*typing in 2/3 letters of the last name,
*hitting the tab key
*then typing in 2/3 letters of the first name,
*then hitting the tab key again.

You can use the address to narrow the search even more if needed.

Click on the guest you want to give a visit to.



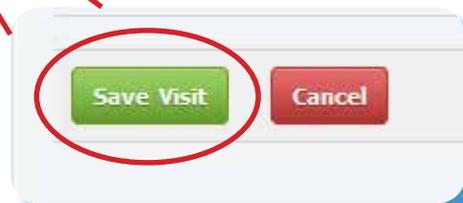
Fill in the information needed for the visit. Start from the top of the page and work your way down. Make sure to answer each question appropriately.

The screenshot shows a web form titled "Create New Visit - #344 - Test Guest". At the top, there are buttons for "Edit Guest", "Save Visit", and "Cancel". Below this are tabs for "General", "Create New Visit", and "Visit History". The form contains the following fields:

Last Visit	No Visits available
Certification Date	
Certification Good Until - enter 2017-10-01	Oct 1, 2017
Household Total	2
Physical Address	111 W 1ST ST Phoenix, AZ 85301
Phone Number(s):	Home: (111) 111-1111
Is this your first visit to this pantry ever?	<input type="radio"/> NO <input checked="" type="radio"/> YES
Food Pounds	<input type="text"/>
Milk Coupon	<input checked="" type="radio"/> NO <input type="radio"/> YES
Help Desired	<input checked="" type="checkbox"/> Food <input type="checkbox"/> Emergency Food
ID Presented	<input checked="" type="checkbox"/> Photo ID <input checked="" type="checkbox"/> Residence

At the bottom of the form, there are buttons for "Save Visit" and "Cancel".

Click 'Save Visit'.



Click 'Done'.



Now search for you next guest

The screenshot shows the 'Create New Visit (Jun 5, 2017)' page. At the top, there is a dropdown menu for 'Monday Pantry (9:30 AM)'. Below it are 'Search' and 'Create New Guest' buttons. A search bar is present with a 'Search' button and navigation arrows. Below the search bar is a table with columns: Last Name, First Name, Address, Apartment, DOB, and Phone. The table contains the message 'No matching records found'. At the bottom, it says 'Showing 0 to 0 of 0 entries (filtered from 277 total entries)'.

If you have a new client, make sure to look for them in your system before making a new account. Once you agree that they are new, click on 'Create New Guest'.

This is a close-up of the 'Create New Visit (Jun 5, 2017)' page. The 'Create New Guest' button is circled in red. The search bar below it is empty.

Fill in the information from top to bottom and 'Save' the record.

The screenshot shows the 'Create Guest' form. At the top, there are 'Save', 'Reset', and 'Cancel' buttons. The 'Save' button is circled in red. The form fields are: First Name (Test), Middle Name, Last Name (Guest), Allowed to receive help? (Banned), Has Residence? (No Residence), Household Total, All others living in home, Physical Address: (Suite, Apartment # etc., City/Town, State, Zip, County), Home Phone, Gender (Select), Date of Birth, and Language Spoken (English).

Saving the guest record will automatically take you to the visit page, where you can process the visit as usual.

The screenshot shows a web application window titled "Create New Visit - #344 - Test Guest". At the top, there are buttons for "Edit Guest", "Save Visit", and "Cancel". Below the title bar are tabs for "General", "Create New Visit", and "Visit History". The main content area is a form for "Test Guest - #344".

Last Visit	No Visits available
Certification Date	
Certification Good Until - enter 2017-10-01	Oct 1, 2017
Household Total	2
Physical Address	111 W 1ST ST Phoenix, AZ 85301
Phone Number(s):	Home: (111) 111-1111
Is this your first visit to this pantry ever?	<input type="radio"/> NO <input checked="" type="radio"/> YES
Food Pounds	<input type="text"/>
Milk Coupon	<input checked="" type="radio"/> NO <input type="radio"/> YES
Help Desired	<input checked="" type="checkbox"/> Food <input type="checkbox"/> Emergency Food
ID Presented	<input checked="" type="checkbox"/> Photo ID <input checked="" type="checkbox"/> Residence

At the bottom of the form are buttons for "Save Visit" and "Cancel".

You may receive some red alerts in the 'Help Desired' section. Each alert will tell you why the alert is there.

If you are unsure how to proceed, seek out your supervisor for help.

This close-up shows the "Help Desired" section of the form. It contains two unchecked checkboxes with red text next to them:

- Food (Not Qualified: Re-Certification Required)
- Emergency Food (Not Qualified: Re-Certification Required)

(Exceeded Uses)