

- www.PantryTrak.com – Cloud based online client registration system

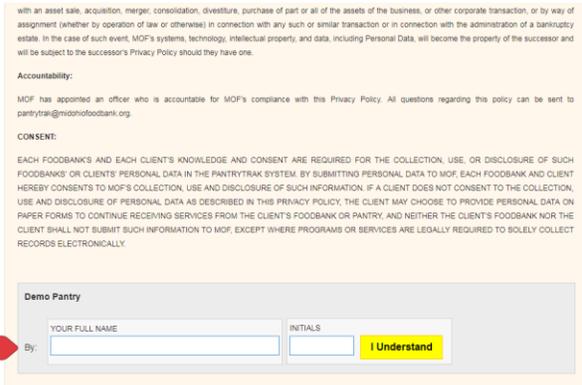


ATTENTION: PantryTrak User

- Effective Monday, March 27th, 2017:
- 1) PantryTrak requires that all users review and acknowledge the following policy before proceeding to use this system and access private client information.
 - 2) System records indicate that you are logging in using a shared account. Every user that logs in using this user name will be required to complete this process every time they log into PantryTrak.
 - 3) Please review all of the information below. At the end of the form, type your full name in the name box, your initials as your electronic signature and click the "I Understand" button.
 - 4) By acknowledging the Privacy Policy below, you understand this is the client's privacy policy to which you must adhere as a system user.

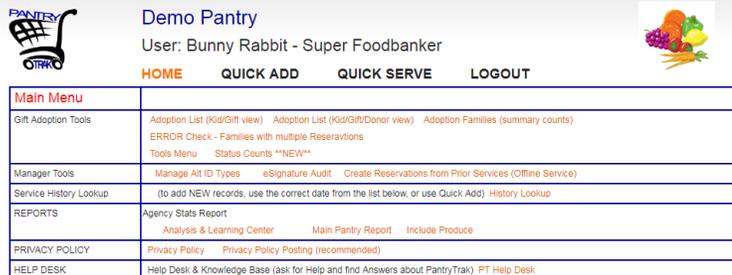


Login to PantryTrak using the given credentials. You will see the Privacy policy. Read it and sign and type your initials at the bottom of the page. Press I understand when you are done.



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Once you have successfully logged in and signed the privacy policy you will be taken to the home screen. To start registration for clients simply press the correct event, which are the yellow buttons.



*** Special Demo System Note: ***
Please use the following zip codes for test entries - 88801, 88802, 88803, 88701, 88702.
Families with these special zip codes are the only ones that will show up when you use the search functions.



Once you have selected the correct event you will be directed to a search log. You may look up clients by last name, first name.



Add New Family & Visit

Service Visit list for Thursday 08/17/2017, Produce Market

Service Visit	Name	Address	City, State	County	Zip	Kid, Adult, Total	Wait Status	Time	Signed	Notes

Wkly - 0

Number of Visits by Time Slot

Date	Family Size
Total Families Served-0	13-0
NEW Families Served-0	44-0
No Show-0	7-0

[Update New Show Counts to Service records](#)

Families without Children-0
Families with Children-0

Total Individuals-0
Children-0
Adults-0
Seniors-0

Use the 3,3 rule to search for a client. Make sure they are not in the system already before you add a new family to the system. If they are in the system already simply click on the correct name. Verify family information is correct and up to date. Capture the e-signature and close the window.

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
3 Families that You Have Served							
Bunny Bags		1234 CARROT LANE	SOHIO/INDIAN, NY	12345	08/02/2017	440-577-7824	<input checked="" type="checkbox"/>
Bunny Bags		1801 Lenny Lane St	Bedford Falls, PT	88801	02/18/2017	555-123-4567	<input type="checkbox"/>
Bunny Bags (Bunny, Jill - HCH)		1024 Fur Ave	FORT CAMPBELL, KY	42223	08/02/2017	555-555-5555	<input type="checkbox"/>
5 Families in Your Area that You Have Not Served							
Bunny Bags		155 Daily Drive	Bedford Falls, PT	88801		none	<input type="checkbox"/>
Bunny Bags		155 Daily Drive	Bedford Falls, PT	88801		none	<input type="checkbox"/>
Bunny Bags		155 Daily Drive	Bedford Falls, PT	88801		none	<input type="checkbox"/>
Bunny Bags		155 Daily Drive	Bedford Falls, PT	88801		none	<input type="checkbox"/>
Bunny Bags (Duck, Daily - HCH)		1456 LUNY TUNNEL LN	COLUMBUS, OH	43211	08/27/2017	440-269-1307	<input checked="" type="checkbox"/>

If they are not in the system you may add them by clicking on the red words that say “Add New Family & reservation”. Fill out all the family information and follow the prompts as suggested to complete the registration.

Name	Info	Address	City, State	Zip	Last Served	Phone	Merge?
3 Families that You Have Served							
James, Lebron		1234 G STREET	CLEVELAND, OH	44110	02/06/2020	216-452-7895	<input checked="" type="checkbox"/>
James, Lebron		1234 SOUTH ST	HOMELESS Bedford Falls, PT	88801	02/18/2020	444-444-4444	<input checked="" type="checkbox"/>
James, Lebron		123 SOUTH MAIN STREET	CLEVELAND, OH	44108	03/04/2020	123-456-5372	<input checked="" type="checkbox"/>



[Add New Family & Visit](#)
 Service Visit list for Friday 03/30/2020 - Food Pantry

If they are in the system, open their client profile by click their name in orange.

Phone Updated

Hopkins, Brittney R

LAST: Hopkins FIRST: Brittney MIDDLE: R SUFFIX:

Homeless

Home Address

STREET ADDRESS: 5510 Baumhart Rd

APT#, LOT#, ETC OR LEAVE BLANK.

CITY: LORAIN STATE: OH

ZIP CODE: 44052

COUNTY: LORAIN County

Address Verified (optional): NO YES

MAIN PHONE: 440-960-2265 2ND PHONE: NO PHONE NUMBER

Family Size	2	Children	1	Adults	1	Seniors	0
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Family Notes

Proxy

In response to Covid-19, Program Staff (including Volunteers) in OHIO are permitted to complete this service **WITHOUT a signature by the Customer**. You simply need a verbal confirmation from the customer that their information is correct and that they meet the eligibility requirements.

SERVE THIS CUSTOMER

Clicking this button will Sign and Serve this customer. This indicates that the customer is eligible for this service. Your name, Brittney Hopkins, will go onto the electronic signature as a member of the Program Staff.

After opening the client profile, confirm family size & personal information quickly. Click on the blue button that says serve this customer. Once electronic signature is captured select the yellow close window button at the top of you screen & reload your search page.

Waiver of e-signature requirements due to Covid-19. (click here to view) ▼

In response to Covid-19, Program Staff (including Volunteers) in OHIO are permitted to complete service visit records **WITHOUT a signature by the Customer**. You simply need a verbal confirmation from the customer that their information is correct and that they meet the eligibility requirements.

You will see a new button appear below the Proxy box that when clicked, will mark the service visit as both Signed and Served. When you view the resulting e-signature audit details you will see that the Users name will be in the Signature Name field and Program Staff will be in the Household Position field.

This new process is designed to provide agencies with a way to continue serving hungry families, maintain program compliance, and most importantly eliminate close contact between customers and agency staff or volunteers.

This Record has been Electronically Signed:
 Signed by: **Brittney Hopkins**
 Position of: **Program Staff**
 Signed on: 2020-03-16 22:48:48
 Household Size: 2
 Form Signed: PS-04-021 - ELIGIBILITY TO TAKE FOOD HOME - English
 Form Revision: Valid From 02/01/2018 Through 06/30/2020

Check your daily log frequently throughout your distribution to ensure there are no missing signatures as you go. If you check it through out the process you may be able to catch and fix any mistakes that may have occurred. Use the reload Page button at the top of your log screen as well . It will help you to show you the most accurate client information and e-signatures.