



# FreshTrak

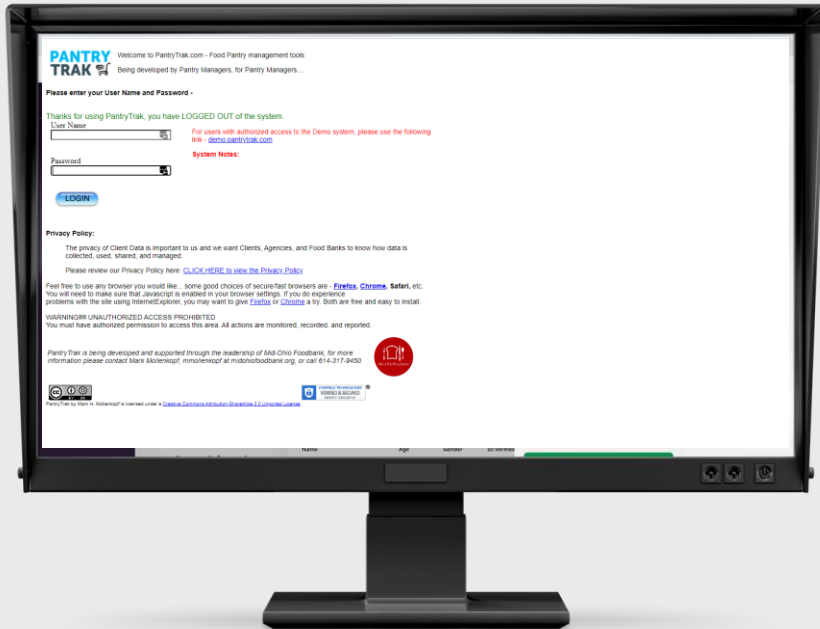
CSFP: Distribution Lists

# CSFP Distribution Lists

These are the lists you will use to manage each month's CSFP distribution.

It is very important to always work off one single list for the month even if you do multiple days of distributions.

These are based on the location of distribution. If you have multiple events, you'll have multiple distribution lists.



# Program Distribution

- Navigate to the "Program Distribution" link

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista

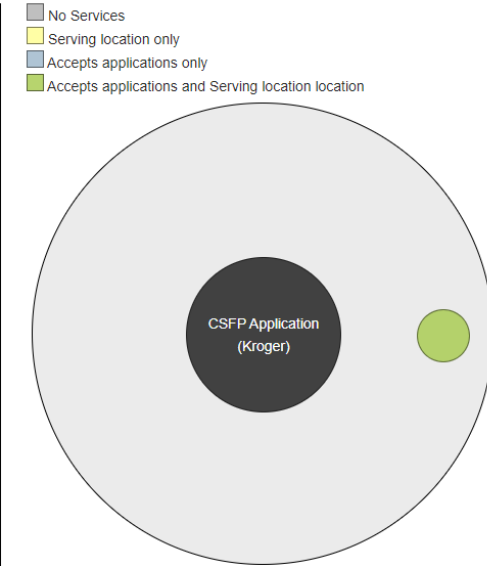
HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants **Program Distribution** Program Letter Templates Reporting

CSFP Application (Kroger)

Mid-Ohio Foodbank CSFP - CSFP Application (Kroger)

Status	Now	Grace No Successor	Grace Has Successor	Future Start Date	Expired	All
<b>Application Status</b>						
Applied	0	0	0	0	3	3
Pending Review	0	0	0	0	0	0
Valid	65	0	0	0	71	136
Incomplete	0	0	0	0	0	0
Not Valid	4	0	0	0	4	8
Enrollee Opt Out	1	0	0	0	2	3
Deceased	0	0	0	0	0	0
<b>Eligibility Status</b>						
Not Eligible	8	0	0	0	8	16
Eligible	62	0	0	0	67	129
Not Determined	0	0	0	0	5	5
<b>Serving Status</b>						
Not Determined	0	0	0	0	3	3
Waitlisted	0	0	0	0	0	0
Serving	58	0	0	0	30	88
Removed	12	0	0	0	47	59
Pending Removal	0	0	0	0	0	0
<b>Notification Letters</b>						
Needs Letter	0	0	0	0	0	0
Letter Generated	0	0	0	0	0	0
Letter Mailed	24	0	0	0	0	24
Letter Returned	0	0	0	0	0	0
Letter Not Required	46	0	0	0	80	126



secure.pantrytrak.com/core/programs\_distribution.php

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista

HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants **Program Distribution** Program Letter Templates Reporting

CSFP Application (Kroger)

1 Start 2 Locations 3 Statuses 4 Applicants 5 Distributions

Select a Program to Begin Creating Distribution Reservations

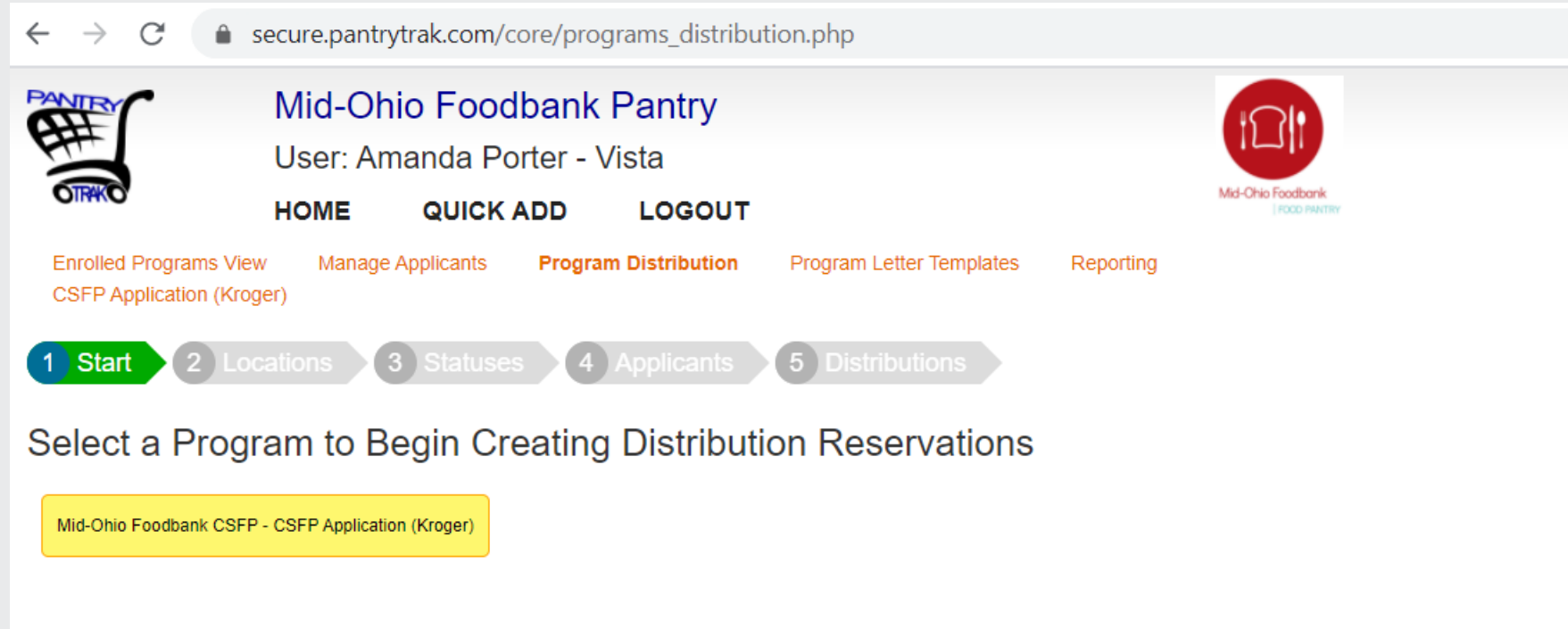
Mid-Ohio Foodbank CSFP - CSFP Application (Kroger)

PantryTrak will walk you through the FIVE steps required to create a distribution list.

If you have multiple events, you will need to complete ALL steps for ALL events.

# Step One: Select a Program

- Select the Program that you'd like to work with (you will likely only have one, depending on your application model)



The screenshot shows a web browser window with the URL `secure.pantrytrak.com/core/programs_distribution.php`. The page header includes the PantryTrak logo, the user name "Amanda Porter - Vista", and navigation links for "HOME", "QUICK ADD", and "LOGOUT". A secondary navigation bar contains links for "Enrolled Programs View CSFP Application (Kroger)", "Manage Applicants", "Program Distribution" (highlighted in orange), "Program Letter Templates", and "Reporting". A progress bar at the bottom of the header shows five steps: "1 Start" (highlighted in green), "2 Locations", "3 Statuses", "4 Applicants", and "5 Distributions". The main content area displays the heading "Select a Program to Begin Creating Distribution Reservations" and a single yellow button labeled "Mid-Ohio Foodbank CSFP - CSFP Application (Kroger)".

# Step 2:

## Select the Location

- Select the correct location (you may have multiple depending on your distribution model)
  - Once selected it will highlight yellow.
- Set the date of your distribution
  - If you distribute on a single date, set your date
  - If you distribute throughout the entire month, just select the first of the month.

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista

HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants **Program Distribution** Program Letter Templates Reporting  
CSFP Application (Kroger)

1 Start 2 **Locations** 3 Statuses 4 Applicants 5 Distributions

Select the location.

Clear

Search:

Select	Serving Event	Service Capacity	Enrolled	Serving	Waitlisted	Date/Time
<input type="checkbox"/>	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)	999	57	57	0	12/14/2020 03:00 PM

Showing 1 to 1 of 1 entries

Previous 1 Next

Enrolled Programs View Manage Applicants **Program Distribution** Program Letter Templates Reporting  
CSFP Application (Kroger)

1 Start 2 **Locations** 3 Statuses 4 Applicants 5 Distributions

Select the location.

Clear Next Step

Search:

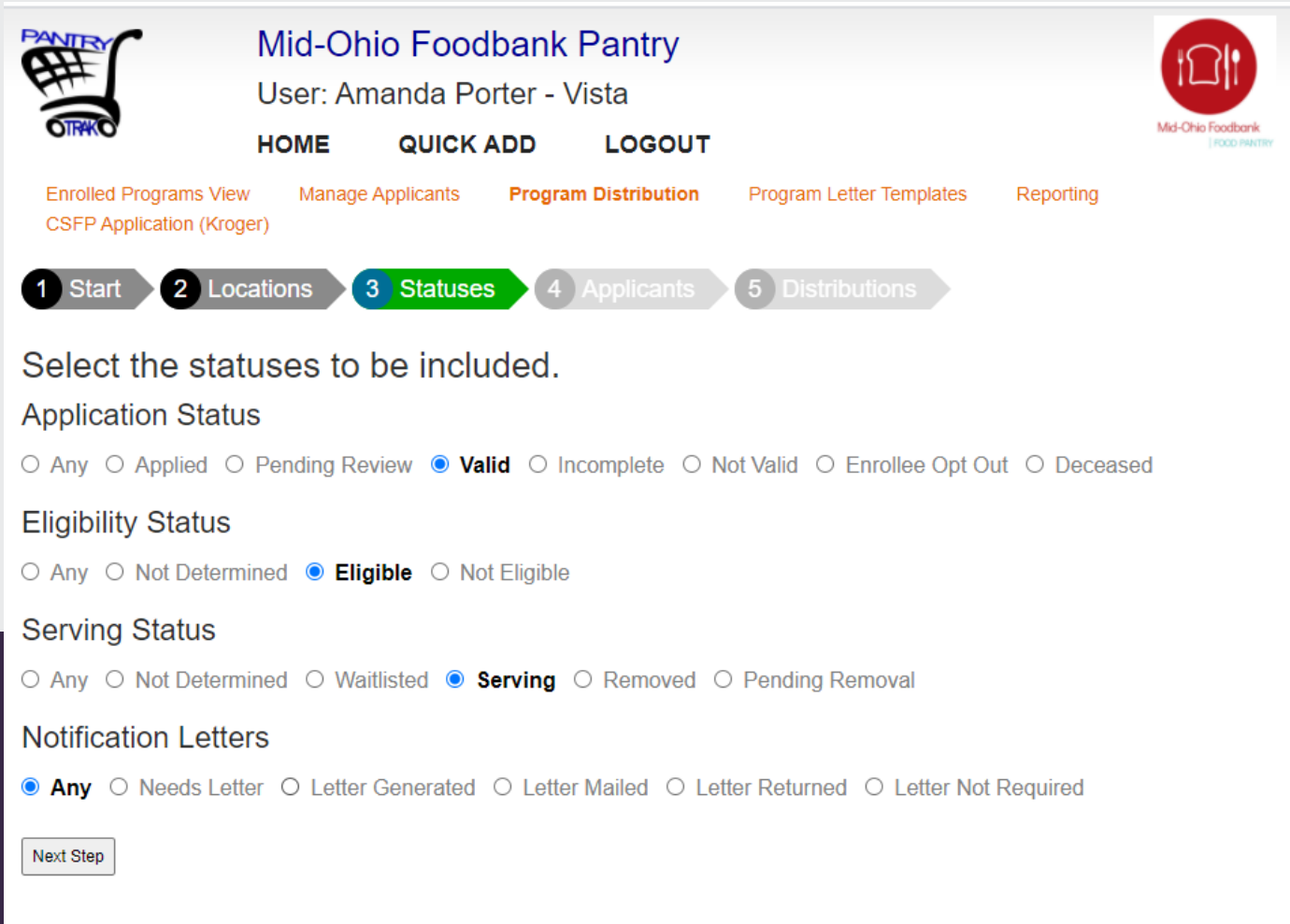
Select	Serving Event	Service Capacity	Enrolled	Serving	Waitlisted	Date/Time
<input checked="" type="checkbox"/>	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)	999	57	57	0	01/01/2021 10:00 AM

Showing 1 to 1 of 1 entries

Previous 1 Next

Next Step

# Step 3: Statuses



The screenshot shows the 'Statuses' step in a web application. At the top left is the 'PANTRY' logo with a shopping cart icon. The user is identified as 'Amanda Porter - Vista'. Navigation links include 'HOME', 'QUICK ADD', and 'LOGOUT'. A menu bar contains 'Enrolled Programs View', 'Manage Applicants', 'Program Distribution' (highlighted), 'Program Letter Templates', and 'Reporting'. A progress bar shows five steps: '1 Start', '2 Locations', '3 Statuses' (highlighted), '4 Applicants', and '5 Distributions'. Below the progress bar, the instruction 'Select the statuses to be included.' is followed by four sections of radio button options: 'Application Status' (Any, Applied, Pending Review, Valid, Incomplete, Not Valid, Enrollee Opt Out, Deceased), 'Eligibility Status' (Any, Not Determined, Eligible, Not Eligible), 'Serving Status' (Any, Not Determined, Waitlisted, Serving, Removed, Pending Removal), and 'Notification Letters' (Any, Needs Letter, Letter Generated, Letter Mailed, Letter Returned, Letter Not Required). A 'Next Step' button is at the bottom left.

**Mid-Ohio Foodbank Pantry**  
User: Amanda Porter - Vista

HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants **Program Distribution** Program Letter Templates Reporting  
CSFP Application (Kroger)

1 Start 2 Locations 3 **Statuses** 4 Applicants 5 Distributions

Select the statuses to be included.

Application Status

Any  Applied  Pending Review  **Valid**  Incomplete  Not Valid  Enrollee Opt Out  Deceased

Eligibility Status

Any  Not Determined  **Eligible**  Not Eligible

Serving Status

Any  Not Determined  Waitlisted  **Serving**  Removed  Pending Removal

Notification Letters

**Any**  Needs Letter  Letter Generated  Letter Mailed  Letter Returned  Letter Not Required

Next Step

- Select which customers should be included on the list based on their statuses.
- Generally recommended are
  - Application Status = valid
  - Eligibility Status = Eligible
  - Serving Status = Serving
  - Notification Letters = Any

**It is not recommended to include waitlist in the initial program distribution list as it's easy to accidentally serve.**

# Step 4: Applicants

- You will get a list of every applicant who meets the requirements of the statuses.
- To Select All, check the box under "Select" in the black bar.

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista

HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants Program Distribution Program Letter Templates Reporting  
CSFP Application (Kroger)

1 Start 2 Locations 3 Statuses 4 Applicants 5 Distributions

Here is your event. Select the applicants to be served.

Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger) on Friday January 1, 2021 at 10:00am

Service Capacity for this location is 999.  
0 of 999 reservations for this event.  
Show All entries

Select	Application Date Enrollment Period	Currently Serving Month	Serving Statuses	Service History	Last Service	Applicant Name	Street Address	City	State	Zip	County	Enrollment ID	Application Service Event	Serving Location
<input type="checkbox"/>	09/07/2019 1:26pm 10/30/2020 - 10/31/2021	2 of 12	Statuses Okay	2 Reservation 1 Served	27105511 10/09/2020 Reserved,27105533	[REDACTED]	[REDACTED]	COLUMBUS	OH	43223	FRANKLIN	57146	24285415 Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
<input type="checkbox"/>	01/03/2020 2:32pm 01/03/2020 - 01/31/2021	12 of 13	Statuses Okay	4 Reservation 1 Served 1 No Show	25309769 07/01/2020 No Show,25439424	[REDACTED]	[REDACTED]	COLUMBUS	OH	43213	FRANKLIN	57226	24288185 Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
<input type="checkbox"/>	01/13/2020 2:03pm 01/13/2020 - 01/31/2021	12 of 12	Statuses Okay	5 Reservation 1 Served 1 No Show	24974160 06/08/2020 Served,25309770	[REDACTED]	[REDACTED]	COLUMBUS	OH	43206	FRANKLIN	57196	24287699 Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
<input type="checkbox"/>	01/19/2020 2:22pm 01/19/2020 - 01/31/2021	12 of 12	Statuses Okay	4 Reservation 1 Served 1 No Show	25309771 07/01/2020 No Show,25439426	[REDACTED]	[REDACTED]	COLUMBUS	OH	43220	FRANKLIN	57219	24288247 Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
<input type="checkbox"/>	01/28/2020 2:06pm 01/28/2020 -	11 of 12	Statuses Okay	4 Reservation	25309772 07/01/2020	[REDACTED]	[REDACTED]	COLUMBUS	OH	43201	FRANKLIN	57202	24287818 Audit View	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)

# Step 4: Continued

- Select: Allows you to Select all or specific applicants
- Applicant Date Enrollment Period: tells you the application period for this applicant
- Current Serving Month: Tells you how close you are to Renewing
- Serving Statuses: Alerts you if there's a problem with one of the Statuses
- Service History: Quick visual of the overall service history for this customer
- Last Service: Tells you the last service and what the type was.

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista  
HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants Program Distribution Program Letter  
CSFP Application (Kroger)

1 Start 2 Locations 3 Statuses 4 Applicants 5 Distribution

Here is your event. Select the applicants to be served.  
Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger) on 10/09/2020  
Service Capacity for this location is 999.  
0 of 999 reservations for this event.  
Show All entries

Select	Application Date Enrollment Period	Currently Serving Month	Serving Statuses	Service History	Last Service
<input type="checkbox"/>	09/07/2019 1:26pm 10/30/2020 - 10/31/2021	2 of 12	Statuses Okay	2 Reservation 1 Served	27105511 10/09/2020 Reserved,27105533
<input type="checkbox"/>	01/03/2020 2:32pm 01/03/2020 - 01/31/2021	12 of 13	Statuses Okay	4 Reservation 1 Served 1 No Show	25309769 07/01/2020 No Show,25439424
<input type="checkbox"/>	01/13/2020 2:03pm 01/13/2020 - 01/31/2021	12 of 12	Statuses Okay	5 Reservation 1 Served 1 No Show	24974160 06/08/2020 Served,25309770
<input type="checkbox"/>	01/19/2020 2:22pm 01/19/2020 - 01/31/2021	12 of 12	Statuses Okay	4 Reservation 1 Served 1 No Show	25309771 07/01/2020 No Show,25439426
<input type="checkbox"/>	01/28/2020 2:06pm 01/28/2020 -	11 of 12	Statuses Okay	4 Reservation 1 No Show	25309772 07/01/2020



# Step 4: Continued

Mid-Ohio Foodbank  
FOOD PANTRY

Templates Reporting

ions

Friday January 1, 2021 at 10:00am

Search:

Applicant Name	Street Address	City	State	Zip	County	Enrollment ID	Application Service Event	Serving Location
[REDACTED]	[REDACTED]	COLUMBUS	OH	43223	FRANKLIN	57146	<a href="#">24285415</a> Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
[REDACTED]	[REDACTED]	COLUMBUS	OH	43213	FRANKLIN	57226	<a href="#">24288185</a> Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
[REDACTED]	[REDACTED]	COLUMBUS	OH	43206	FRANKLIN	57196	<a href="#">24287699</a> Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
[REDACTED]	[REDACTED]	COLUMBUS	OH	43220	FRANKLIN	57219	<a href="#">24288247</a> Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)
[REDACTED]	[REDACTED]	COLUMBUS	OH	43201	FRANKLIN	57202	<a href="#">24287818</a> Audit View	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)

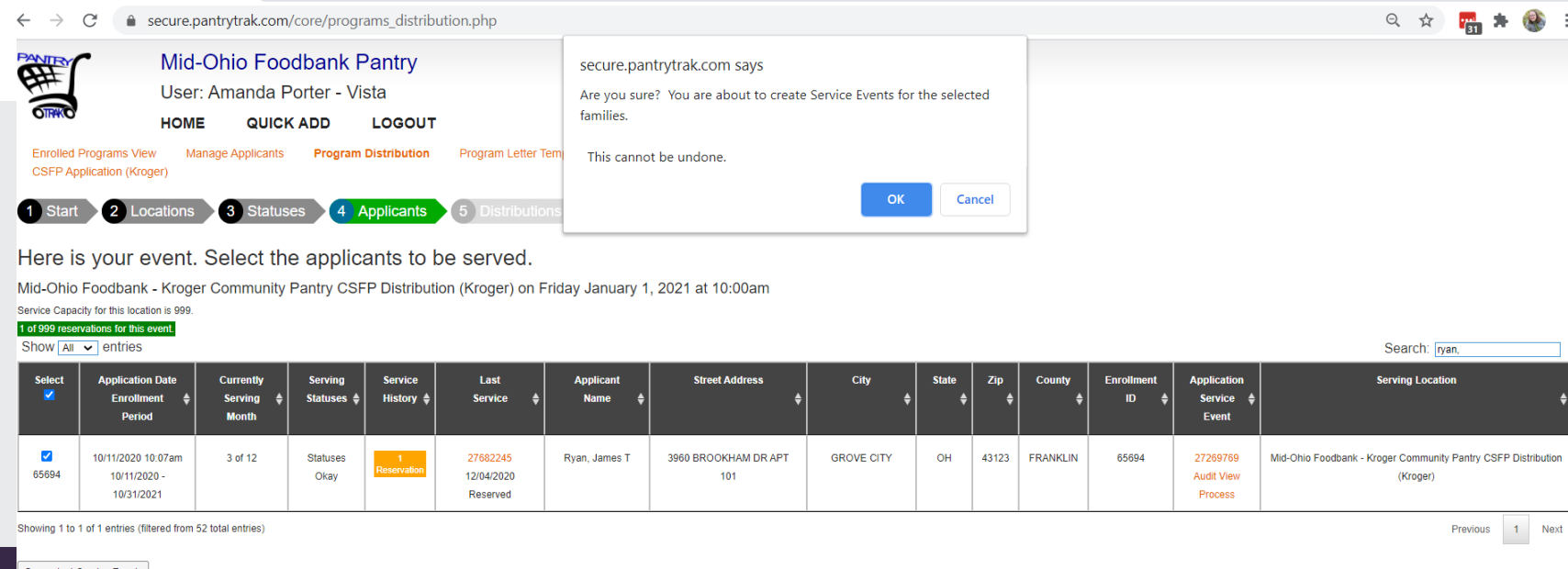
- Applicant Name, Street Address, City, State, Zip County: The household information for this customer (covered here for customer privacy)
- Application Service Event Id: Use to navigate back to the application service event
- Serving Location: The selected serving location.

# Step 4: Generate Service Events

65694	10/11/2020 - 10/31/2021	Okay	Reservation	12/04/2020 Reserved	101							Audit View Process	(Kroger)
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Showing 1 to 1 of 1 entries (filtered from 52 total entries)

Previous 1 Next



secure.pantrytrak.com/core/programs\_distribution.php

Mid-Ohio Foodbank Pantry  
User: Amanda Porter - Vista  
HOME QUICK ADD LOGOUT

Enrolled Programs View Manage Applicants Program Distribution Program Letter Term  
CSFP Application (Kroger)

1 Start 2 Locations 3 Statuses 4 Applicants 5 Distributions

Here is your event. Select the applicants to be served.

Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger) on Friday January 1, 2021 at 10:00am  
Service Capacity for this location is 999.  
1 of 999 reservations for this event.  
Show All entries

Select	Application Date Enrollment Period	Currently Serving Month	Serving Statuses	Service History	Last Service	Applicant Name	Street Address	City	State	Zip	County	Enrollment ID	Application Service Event	Serving Location
<input checked="" type="checkbox"/>	10/11/2020 10:07am 10/11/2020 - 10/31/2021	3 of 12	Statuses Okay	1 Reservation	27682245 12/04/2020 Reserved	Ryan, James T	3960 BROOKHAM DR APT 101	GROVE CITY	OH	43123	FRANKLIN	65694	27269769 Audit View Process	Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)

Showing 1 to 1 of 1 entries (filtered from 52 total entries)

Previous 1 Next

- Select all of the appropriate applicants
- Scroll to bottom of screen and click button "Generate Service Events"
- PantryTrak will prompt you to be sure this is your intended action. This cannot be undone.

# Step 5: Distribution List

- You have now created a distribution list
- You can either serve from your main check in screen or you can print the list and give to another distributor.



The screenshot displays the user interface for the Mid-Ohio Foodbank Pantry. At the top left is the logo, which features a shopping cart with the word "PANTRY" above it and "OTRKR" below it. To the right of the logo, the text "Mid-Ohio Foodbank Pantry" is displayed in blue, followed by "User: Amanda Porter - Vista" in black. Below this, there are three navigation links: "HOME", "QUICK ADD", and "LOGOUT".

Underneath the navigation links, there are several menu items: "Enrolled Programs View CSFP Application (Kroger)", "Manage Applicants", "Program Distribution" (highlighted in orange), "Program Letter Templates", and "Reporting".

A progress bar is located below the menu items, consisting of five steps: "1 Start", "2 Locations", "3 Statuses", "4 Applicants", and "5 Distributions". The "5 Distributions" step is highlighted in green, indicating the current active step.

At the bottom of the screenshot, there is a table with the following data:

Event	Date	Created Reservations	All Reservations	
Mid-Ohio Foodbank - Kroger Community Pantry CSFP Distribution (Kroger)	01/01/2021	1	408	<a href="#">Check-in</a>

Questions?