



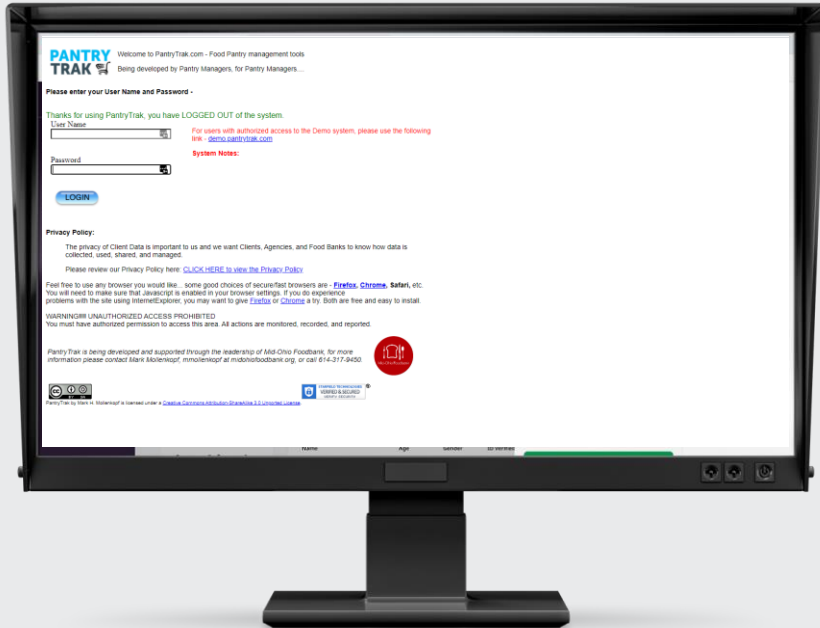
FreshTrak

CSFP: Serving Instructions

Before Serving...

You'll need to have created a distribution list (see previous instructions)

A customer will have to have completed an application and be approved as either “serving” or “waitlisted”



Serving Instructions

- After creating your distribution list, navigate to the "Programs" Tab of the Service Log

The screenshot displays the PantryTrak web application interface. At the top, there is a navigation menu with various tools and reports. Below this, a section titled "Serve Families on 01/19/2021" features a flowchart of service options: Pantry, Pantry Express, CSFP Application (Kroger), CSFP Distribution (Kroger), Drive Thru Shift 1, and Drive Thru Shift 2. A green arrow points from the "Programs" tab in the "Service Log" section to the "Drive Thru Shift 1" option in the flowchart. The "Service Log" section includes a filter for "Current" and a "Programs" tab. The "Service Snapshot" section shows a table of visit records and a line chart for a NEW report.

Event	Date	# Services	Check-in
Drive Thru Shift 1	01/25/2021	1	Check-in
Drive Thru Shift 1	01/19/2021	244	Check-in
Drive Thru Shift 1	01/15/2021	370	Check-in
Drive Thru Shift 2	01/14/2021	97	Check-in
Drive Thru Shift 1	01/14/2021	416	Check-in
Drive Thru Shift 2	01/13/2021	239	Check-in
Drive Thru Shift 1	01/13/2021	495	Check-in
Drive Thru Shift 2	01/12/2021	92	Check-in
Drive Thru Shift 1	01/12/2021	573	Check-in
Drive Thru Shift 2	01/11/2021	77	Check-in
Drive Thru Shift 1	01/10/2021	32	Check-in
Drive Thru Shift 1	01/10/2021	3	Check-in
Drive Thru Shift 1	01/09/2021	550	Check-in
Drive Thru Shift 1	01/08/2021	458	Check-in
Drive Thru Shift 1	01/07/2021	409	Check-in
Drive Thru Shift 2	01/07/2021	61	Check-in
Drive Thru Shift 1	01/06/2021	511	Check-in
Drive Thru Shift 2	01/06/2021	142	Check-in
Drive Thru Shift 1	01/05/2021	545	Check-in

	Visit Records	Served
Today	212	185
This Week	212	185
This Month	5258	5137
This Year	5258	5137

Serving: Choose your date of service

Service Log

Current By Year **Programs**

Select the program distributions:

2020 ▼

CSFP Distribution (Kroger)

Event	Date	# Services	
CSFP Distribution (Kroger)	12/17/2020	1	Check-in
CSFP Distribution (Kroger)	12/04/2020	58	Check-in
CSFP Distribution (Kroger)	10/30/2020	2	Check-in
CSFP Distribution (Kroger)	10/23/2020	3	Check-in
CSFP Distribution (Kroger)	10/16/2020	7	Check-in

- Use the dropdown menu to choose the correct year
- Use the checkbox to select the right program (will be multiple if you have multiple distribution sites)
- Use the “Date” link to choose the MAIN screen.
 - If you serve throughout the month always return to the FIRST date of distribution in that month.
 - This is key for follow up. You can serve multiple days, but always begin from your MAIN distribution list for that month.

Serve:

Enrolled Customer

- The customers will show up on this list.
 - Click the link in the "Service Visit #" column to open the customer and serve
- Served customers will turn Green

secure.pantrytrak.com/core/program_reservation_list.php?date=2020-12-04&event_id=4831

HOME Lists: Regular Serving/Check-In Offline Store Reload Page

Search for a Family... Type abbreviated name here
Ex. Search for George Washington by typing "was.geo" View Help RESET

Name Address DOB Phone Alt ID Expand

Enrolled Program Service Visit list for Friday 12/04/2020, CSFP Distribution (Kroger)

Show 500 entries Search:

Service Visit #	Name	Address	City, State	County	Zip	Kids, Adults, Total	Visit Status	Time	Signed	Notes
27682244			GROVE CITY, OH	FRANKLIN	43123	0 + 2 = 2	Reserved CSFP	03:00 PM		
27682243			COLUMBUS, OH	FRANKLIN	43207	0 + 5 = 5	Reserved CSFP	03:00 PM		
27682218			COLUMBUS, OH	FRANKLIN	43201	0 + 1 = 1	Reserved CSFP	03:00 PM		
27682250			COLUMBUS, OH	FRANKLIN	43204	0 + 1 = 1	Reserved CSFP	03:00 PM		
27682257			COLUMBUS, OH	FRANKLIN	43228	0 + 1 = 1	Reserved CSFP	03:00 PM		
27682223			COLUMBUS, OH	FRANKLIN	43204	0 + 2 = 2	Reserved CSFP	03:00 PM		
27682234			COLUMBUS, OH	FRANKLIN	43204	0 + 2 = 2	Reserved CSFP	03:00 PM		
27682251			GROVE CITY, OH	FRANKLIN	43123	0 + 1 = 1	Served CSFP	03:00 PM	e	

Serve Enrolled Customer: Sign service event

- During Covid-19 waivers, you can simply click the "Serve this Customer" button to sign for the customer.

The screenshot shows a web browser window with the URL `secure.pantrytrak.com/core/reservation_edit2.php?service_event_id=28309271`. The browser tabs include 'Main', 'E-Signature', 'Served Last on: 12/17/2020', 'Additional Info', 'Notes', 'Family Members', 'Referrals', 'Close Window', and 'Reload'.

The main content area is titled 'Ryan, James T' and contains a form with the following fields:

- LAST: Ryan, FIRST: James, MIDDLE: T, SUFFIX: [dropdown]
- Homeless
- Home Address: STREET ADDRESS: 3960 BROOKHAM DR, APT., LOT#, ETC OR LEAVE BLANK.: APT 101
- CITY: GROVE CITY, STATE: OH
- ZIP CODE: 43123
- COUNTY: FRANKLIN County
- Address Verified (optional): NO YES
- MAIN PHONE: 614-317-9773, 2ND PHONE: [empty], NO PHONE NUMBER:

Family Information:

Family Size	3	Children	1	Adults	1	Seniors	1
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Family Notes: [empty text area]

Proxy: [empty text area]

A yellow box highlights the 'SERVE THIS CUSTOMER' button with a green arrow pointing to it. The text inside the box reads: '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.' Below the button, it states: 'Clicking this button will Sign and Serve this customer. This indicates that the customer is eligible for this service. Your name, Amanda Porter, will go onto the electronic signature as a member of the Program Staff.'

Program Timeline (Experimental):

Enrollment Start: Oct 11, 2020

Jan 19, 2021: You are Here

Reapply Zone: [shaded area]

Oct 16, 2021: Followup

Enrollment End: Oct 31, 2021

Service Provided: Add-Pantry Service

Date & Time: 12/04/2020 at 01:00 PM

Optional Reporting: (Show)

Reporting Event: CSFP Distribution (Kroger)

This Service Visit is Linked to a Primary Service - 27269769 - CSFP Application

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Military Service	Gender	Identification	Status	Serving	
James	T	Ryan		11/07/1958	62	Veteran	OF	OM	Needed	Verified	<input checked="" type="checkbox"/>

Serve: Waitlist Customer

HOME Lists: Regular Serving/Check-In Offline Store Reload Page

rya.jame Found 9 matches - Hover over the info icon to see more information. Clicking the link will add the visit immediately. RESET Expand

Search Results

Actions	Client	Enrollment	Info	Address	City, State	Zip	Last Served	Phone	Merge?
New Visit	Ryan, James November 07, 1988	Active Enrollment Oct 11, 2020 - Oct 31, 2021 CSFP Distribution (Kroger)	i	3980 BROOKHAM DR APT 101	GROVE CITY, OH	43123	12/17/2020 CSFP	614-317-9773	<input checked="" type="checkbox"/>
Audit View New Visit	Ryan, James November 07, 1980	Enrollment Not Approved	i	3980 BROOKHAM ST	MIDDLETOWN, OH	45044	10/17/2019 5	none	<input checked="" type="checkbox"/>
New Visit	Ryan, James November 07, 1985	Not Enrolled	i	3980 BROOKHAM DR HOMELESS	GROVE CITY, OH	43123	07/25/2020	614-292-6446	<input checked="" type="checkbox"/>

- From your distribution list, search using the top search box
- Click “New Visit” to serve this customer

Blue: customers who are approved

Serve with no problems

Gray: customers who have an application, but are not enrolled

Double check before serving

Red: customers who do not have an application

Do not serve until you have completed an application and approved it.

Serve Waitlist Customer: Sign Service Event

- During Covid-19 waivers, you can simply click the "Serve this Customer" button to sign for the customer.

The screenshot shows a web browser window with the URL `secure.pantrytrak.com/core/reservation_edit2.php?service_event_id=28309271`. The page title is "Ryan, James T".

Customer Information:

- LAST: Ryan, FIRST: James, MIDDLE: T, SUFFIX: [dropdown]
- Homeless:
- Home Address: 3960 BROOKHAM DR, APT. 101, GROVE CITY, OH, ZIP: 43123, COUNTY: FRANKLIN County
- Address Verified (optional): NO YES
- MAIN PHONE: 614-317-9773

Family Information:

Family Size	3	Children	1	Adults	1	Seniors	1
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Family Notes: [Text area]

Proxy: [Text area]

COVID-19 Waiver: 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 (highlighted with a green arrow)

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

Program Timeline (Experimental):

- Enrollment Start: Oct 11, 2020
- Jan 19, 2021: You are Here
- Reapply Zone: [shaded area]
- Enrollment End: Oct 31, 2021
- Oct 16, 2021: Followup

Service Event Table:

Service Provided	Date & Time	Optional Reporting	Reporting Event
CSFP Box	12/04/2020 at 01:00 PM	(Show)	CSFP Distribution (Kroger)

Customer List Table:

First Name	Middle	Last Name	Suffix	Date of Birth	Age	Military Service	Gender	Identification	Status	Serving	
James	T	Ryan		11/07/1958	63	Veteran	OF	OM	Needed	Verified	<input checked="" type="checkbox"/>

Serve: Add Secondary Event (part 1)

secure.pantrytrak.com/core/reservation_edit2.php?service_event_id=28309271

Main E-Signature Served Last on: 12/17/2020 Additional Info Notes Family Members Referrals Close Window Reload

Ryan, James T

LAST: Ryan FIRST: James MIDDLE: T SUFFIX:

Homeless

Home Address

STREET ADDRESS: 3960 BROOKHAM DR

APT#, LOT#, ETC OR LEAVE BLANK: APT 101

CITY: GROVE CITY STATE: OH

ZIP CODE: 43123

COUNTY: FRANKLIN County

Address Verified (optional): NO YES

MAIN PHONE: 614-317-9773 2ND PHONE: NO PHONE NUMBER

Family Size: 3 Children: 1 Adults: 1 Seniors: 1

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.

This Service Visit has been marked as **NO SHOW**

Program Timeline (Experimental)

Enrollment Start: Oct 11, 2020

Jan 19, 2021: You are Here

Reapply Zone

Enrollment End: Oct 31, 2021

Oct 16, 2021: Followup

Service Provider	Date & Time	Optional Reporting	Reporting Event
<input type="text" value="Add-Pantry Service"/>	12/04/2020 at 01:00 PM	(Show)	CSFP Distribution (Kroger)

This Service Visit is Linked to a Primary Service - 27269769 - CSFP Application

- From inside the CSFP distribution event, click the button “Add-Pantry Service”
- If you don’t see this button reach out to your Food bank coordinator, they can set it up for you.

Serve: Add Secondary Event (part 2)

- A new service event will be created
 - Follow the link to sign for the second service event

secure.pantrytrak.com/core/reservation_edit2.php?service_event_id=28309271

Address Verified (optional): NO YES

MAIN PHONE: 614-317-9773

2ND PHONE:

NO PHONE NUMBER:

SERVE THIS CUSTOMER

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

Program Timeline (Experimental)

Enrollment Start: Oct 11, 2020

Enrollment End: Oct 31, 2021

Jan 19, 2021: You are Here

Reapply Zone

Oct 16, 2021: Followup

Service Provided	Date & Time	Optional Reporting	Reporting Event
CSFP Box	12/04/2020 at 01:00 PM	(Show)	CSFP Distribution (Kroger)

This Service Visit is Linked to a Primary Service - 2726876 - CSFP Application

There are Secondary Services linked to this Service - 28309848 - Pantry - Prepack - 7 day

First Name	Middle	Last Name	Suffix	Date of Birth mm/dd/yyyy	Age	Military Service	Gender	Identification	Status	Serving
James	T	Ryan		11/07/1958	62	Veteran	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified		<input checked="" type="checkbox"/>
Senior1A		Ryan		11/01/1978	42	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	<input type="checkbox"/>
Child1A		Ryan		12/01/2005	15		<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	<input type="checkbox"/>
Senior1A		Ryan			65	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>
SARAH		Ryan			40	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>
Child1A		Ryan			10		<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>

HOW DID THEY SIGN?

Signed Paper Form | Signed Electronic Form | Not Required | Required, NOT Signed


SERVICE VISIT STATUS:

Reserved | Served | No Show | Cancelled by Client | Cancelled internal | Duplicate void

Be sure to capture a signature for BOTH services

List Management: No Shows

- At the end of the month, it's worth your time to go through the list and mark any non served customers

28309271	Ryan, James	3960 BROOKHAM DR APT 101	GROVE CITY, OH	FRANKLIN	43123	1 + 2 = 3	Reserved 	01:00 PM		
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secure.pantrytrak.com/core/reservation_edit2.php?service_event_id=28309271

Enrollment Start Oct 11, 2020 | Jan 19, 2021 You are Here | Reapply Zone | Enrollment End Oct 31, 2021

Oct 16, 2021 Followup

Service Provided	Add-Pantry Service	Date & Time	Optional Reporting	Reporting Event
CSFP Box		12/04/2020 at 01:00 PM	(Show)	CSFP Distribution (Kroger)

This Service Visit is Linked to a Primary Service--27209709 - CSFP Application

First Name	Middle	Last Name	Suffix	Date of Birth	Age	Military Service	Gender	Identification	Status	Serving
James	T	Ryan		11/07/1958	62	Veteran	<input checked="" type="radio"/> F <input type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified		<input checked="" type="checkbox"/>
Senior1A		Ryan		11/01/1978	42	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	<input type="checkbox"/>
Child1A		Ryan		12/01/2005	15		<input checked="" type="radio"/> F <input type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input checked="" type="radio"/> Active <input type="radio"/> Inactive	<input type="checkbox"/>
Senior1A		Ryan			65	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>
SARAH		Ryan			40	Please Choose	<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>
Child1A		Ryan			10		<input type="radio"/> F <input checked="" type="radio"/> M	<input checked="" type="radio"/> Needed <input type="radio"/> Verified	<input type="radio"/> Active <input checked="" type="radio"/> Inactive	<input type="checkbox"/>

Add Family Member

HOW DID THEY SIGN?
 Signed Paper Form Signed Electronic Form Not Required Required, NOT Signed Face Sheet

SERVICE VISIT STATUS:
 Reserved Served No Show Cancelled by Client Cancelled internal Duplicate void

Alt IDs

"Take-a-Number" tracker (optional) Client's # in line -0 (The next number to use should be 1) Choose Serving Status

Close Window Reload

Close Window & Add ANOTHER Service for this same family

Family Status
 New Family Previously Served

- Click on the link in "service event #"
- Scroll to the bottom of the service event and choose the correct "Service Event Status"
- The service event will turn orange on your distribution list

28309271	Ryan, James	3960 BROOKHAM DR APT 101	GROVE CITY, OH	FRANKLIN	43123	1 + 2 = 3	No Show	01:00 PM		
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Questions?