Agency Welcome Packet

Link2Feed

For support email: L2F@foodbankrockies.org

Live Link: portal.link2feed.com

Training Link: test-acounts.link2feed.com

Last Updated: 10/04/2018

LINK2FEED

Link2Feed is a Certified B Corporation that believes we can't end hunger if we don't understand it.

Our technology helps organizations around the world feed change, one link at a time.

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About Link2Feed

Link2Feed is certified B Corporation that believes that we can't end hunger if we don't understand it. Their technology helps organizations around the world feed change in their communities. More than 3,100 organizations have used Link2Feed to assist 1.6 million neighbors in need. To learn more about Link2Feed visit www.link2feed.com

(Page 4 Training Handout)

Agency Benefits

Link2Feed is a free easy-to-use client intake software available to all partners of Food Bank of the Rockies. FBR uses Link2Feed to manage the CSFP and TEFAP program. In addition to these federal commodities programs, agencies can also manage their own customized programs all in one place.

- Link2Feed is client intake software developed specifically for food banks and their pantries.
- It's used to collect, manage, and report service data.
- It allows a client to complete one application for service.
- It provides real-time information about your agency.
- Will increase our network's efficiency and communication.
- Allow us to truly understand the need in our area.
- No physical software to install or updated- it's all online!
- Gather all of the information that is needed as a network and store it in a secure online database.
- It's just as secure as the software that your banking institution uses.

What's in it for me?

- Easy Intake - Intuitive step-by-step intake process easy for those with limited computer experience.
- Paperless Process - Eliminate the need for hardcopy client files
- Automated Compliance- TEFAP and CSFP requirements including electronic signatures, eligibility and reporting directly in the software
- Graphic Reporting -Generate custom reports saving hours of manual tabulation and making analysis easy.
- Multi Program Tracking- Track all of your programs from financial assistance to clothing programs in Link2Feed
- Case Management- Tools like notes, referral tracking and messaging allow you to understand and support all of a client's needs.

Hardware and Software Requirements

Hardware Requirements

- Memory (RAM): 512 MB
- Hard Drive Space: 500 MB
- Internet Access: via Ethernet, Wi-Fi, Gobi (4G/4G LTE), Mobile Broadband (4G/4G LTE)

Supported Operating Systems

- Windows (7 or Higher)
- Mac OS X (10.9 or Higher)

Required Software

- Web Browser
- Google Chrome (up to date)
- Mozilla Firefox (up to date)
- Safari 7+ (up to date / OS X only)
- JavaScript must be enabled
- Cookies must be enabled
- SSL must be enabled
- Some reports require Flash (table tools)
- Chrome contains Flash by default
- Firefox and Safari require Flash to be installed

Link2Feed FAQs

Is client data secure? Yes!

- L2F is bound by a detailed licensing and confidentiality agreement that affirms no ownership to your food bank's data or user information. At no point will L2F release your data to the public or sell it to an affiliate.
- L2F's 128-bit security encryption per field is the same level of online banking providers. The L2F system automatically assesses all browser security settings prior to accessing the online system in order to ensure the highest level of data protection.
- Every authorized user is required to read, understand and sign (by logging in) an End User License Agreement (EULA). The system automatically sends an agreement through L2F software that all users must click to accept in order to login.
- All staff and volunteers must have their own login to L2F. Usernames or passwords are not to be shared.
- User roles are assigned to every end user/intake person with varying levels of permissions to access client data. For example: An Agency Manager role has access to set up users, run reports, etc. A Services role would be assigned to a volunteer limiting client information that they can view, no report capability, etc. It is the responsibility of the Agency Manager to conduct regular maintenance of overview of users and roles.
- Two Factor Authentication Code requires all users to type in a secondary password each time they log in from a new device to prevent users from accessing the system outside of permitted locations, an agency manager must also be present for this to function. Example: A volunteer would not be able to log in remotely outside of the hunger relief organization's facility as they wouldn't know the secondary password.
- Client data is more secure in L2F since pieces of paper on a desk or stored in unlocked file cabinets are vulnerable to copying!
- For additional security information: ***http://link2feed.com/security-features/***

Who owns the client data? Your organization does!

- Link2Feed contract directly states (Section 1.4) partner utilizing database is the owner of the data.
- Link2Feed acknowledges Client Data entered into the Software by End Users of Licensee or an End User, and stored and maintained within the Software, is the property of the Licensee or End User as noted in the EULA (section 10)
- For additional contract and agreement information: ***http://link2feed.com/us-contract-and-licensing/***

How is client information shared?

- If a user searches for a client name, and they've received services from other FBR partners, their information will come up. This provides a faster intake process for the client and prevents dual participation for certain commodities programs.
- Users are unable to see the client's visits to other FBR partners.
- Users are unable to create lists of client names from L2F. This provides additional client data security and accessibility.

What if a client doesn't want their information in L2F? They don't have to do so!

- A client who doesn't want their information entered into L2F can still be served via a manual intake process (paper forms). Your agency can still track the service as an "anonymous visit".
- Clients may opt out of answering certain category questions. These fields are then noted as "undisclosed".
- A client's information can be deleted from L2F at their request. Please email the client ID number to L2F@foodbankrockies.org

How will I get support for Link2Feed?

- Link2Feed has a robust searchable user manual within the portal. Upon logging in click on the support menu on the left-hand side and select "User Manual".
- Link2Feed has a YouTube channel for their training videos including several for Intake, CSFP, and Reporting. https://www.youtube.com/user/link2feed

If your clients have questions regarding L2F refer them to Our Data Promise information sheet. These should be available to clients at all times.

Our Data Promise

"Our Data Promise" is a one-page handout for your clients that explains the Food Bank of the Rockies network goals for data collection. It also outlines what information is required to be disclosed for TEFAP and CSFP as well as what information is optional. It also helps the client understand how their aggregate data will be used to better advocate for program funding in their community. The data promise should be given to all new clients who are entered into Link2Feed, and copies should be made available to clients to take at all times.

The full document is available in Appendix 1. Digital copies will be sent at the end of this training

Link2Feed Poster Requirements

At your site please have "What is Link2Feed" Poster posted visually available for all clients to view.

A sample poster can be seen in Appendix 2 of this document.

Posters are provided at training and a digital copy can be requested by emailing l2f@foodbankrockies.org.

Agreements

Understanding the EULA

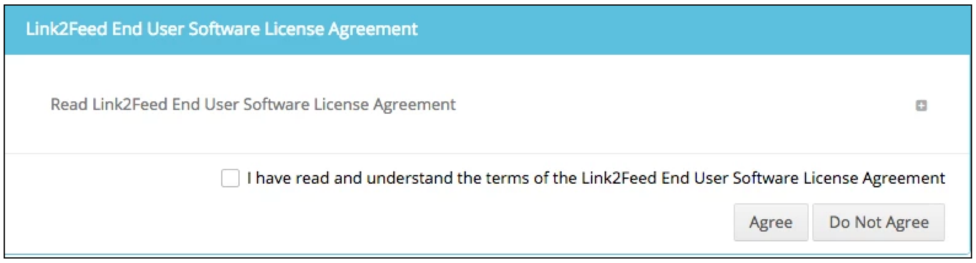
What does EULA mean?

EULA means "End User License Agreement". You can review the entire document EULA when you login or by visiting: http://link2feed.com/us-contract-and-licensing/

All users must approve the EULA before logging into Link2Feed.

Approving the EULA

By logging into the FBR link2feed database, you have checked the “I agree to the Link2Feed End User Software License Agreement”



In a nutshell we have created our Memorandum of Understanding (MOU) of what each user is responsible when having access to L2F.

Memorandum of Understanding

In addition to accepting the end user licensing agreement (EULA) in Link2Feed, all FBR network users will also sign an Memorandum of Understanding (MOU) documenting their understanding of the EULA as well as FBR L2F procedures. This MOU was developed to help users understand their role protecting their user credentials, understanding client confidentiality protocols, and their responsibility in the Data Collection effort.

You will sign your MOU at training and give that copy to FBR.

You will be responsible for collecting MOUs for all agency users you create and periodic monitoring visits will be conducted to reconcile MOUs with existing user accounts. These MOUs must be kept on file in alphabetical order in a binder in a locked cabinet at your agency.

The full MOU is available in Appendix 3.

Security in Link2Feed

The following is a list of security features in Link2Feed:

- All data in L2F is protected by 128-Bit Encryption (The same level of security used in online banking).
- There is currently no way for individuals to easily pull lists of client information as best practices for data management.
- When pulling reports it only shows household information but has no other identifiable information.
- L2F has automatic timeout feature that logs users out after a period of inactivity. With a paper form, could be just sitting on a desk that can be accessed by anyone at any given time.

- All user accounts are fully customized to provide only the relevant information for their job function.
- Agency Managers will create their own Agency-Specific private Two-Factor Authentication Code. This will require all volunteers to have the Agency Manager type in the password each time they log in from a new device. This prevents users from accessing the system outside of the permitted location.

Understanding User Roles

As an Agency Manager you have the ability to create user accounts for your staff and volunteers. Each user account can be customized for the role of the person using the system. The recommended role for most users is "Services Only".

If you're unsure of who your Agency Manager should be, please contact Food Bank of the Rockies.

User Roles	User Type	Person Type	L2F Roles
Agency Manager (2)	• Can add/edit users • Enters Two-Factor Authentication Code • Has access to reports **Only 2 users per organization	• Pantry Manager • Assistant Manager • Director • Full-Time Staff • Long Term Volunteer that manages the pantry. • Bookkeeper	• Agency Manager • Agency Intake • Intake Anonymous • Reporter • CSFP Worker (if applicable) • User (Automatically checked)
Agency Intake with Reports	• Perform client intake / access client profiles • Record visit info • Edit/delete visits in 24 hours • Delete notes across network • Run Reports ** Any user who needs to access client data must have this role.	• Volunteer that manages pantry • Food Access Coordinator • Program Coordinator	• Agency Intake • Intake Anonymous • CSFP Worker (If applicable) • Reporter • User (Automatically checked)
Agency Intake Without Reports	• Perform client intake / access client profiles • Record visit info • Edit/delete visits in 24 hours	• Regular volunteer • Intake Specialist • Front Desk Personnel	• Agency Intake • Intake Anonymous • CSFP Worker (If applicable)

	• Delete notes across network • NO access to reports ** Any user who needs to access client data must have this role.	• Customer Service Rep • Leads • Community Service Intake • AARP/Goodwill Volunteer	• User (Automatically checked)
Services Only	• Will only be able to enter services for each client.	• Occasional Intake Volunteer • Regular Volunteer • Community Service Intake	• Agency Intake • Intake Anonymous • User (Automatically checked

Practice Scenarios

Collecting Client Consent

Every time a new client comes in you must inform them that we are collecting service insights and entering the client's information into our L2F Database. Partner Agencies should never deny services to any client who declines to give authorization for the information to be recorded in Link2Feed.

Intake Person: Hi, I'm (name). We're so glad you came to Agency (Agency Name) today and we're here to help you!

First, I'd like to get some information from you to add to our Link2Feed Database so the next time you come in, your visit will be faster. Would that be OK?
Client: Why?

Intake Person: This information is only shared with Food Bank of the Rockies' partner pantry network to help us get service insight and more resources for the people we help.

The data uses security similar to a bank and your information is kept confidential.

If you have any questions, here's a form to get some answers. –Refer Clients to "Our Data Promise" Form.

What to do when their self-declared income is too high for TEFAP

Assume this is a household with 2 or fewer people
Intake Person: What is your household's monthly income?

Client: We make $(2,600) a month.

Intake Person: OK, thank you. Is there anything going on at home that has brought you into the pantry today?

Client: Yes, we're having a really hard time right now. My child had a major surgery and we had a flood at home. We had to replace everything. Money is very tight and we're barely making it.

Intake Person: I'm so sorry to hear that. Your household income is higher than allowable for TEFAP, but since you're experiencing an emergency we can serve you today. We'll check in to see how things are going on your next visit.
<u>You would serve client TEFAP product and document in the notes section why the income exception was permitted.</u>

What to do when a client declares their income is $0 for TEFAP

Intake Person: What is your household's monthly income?

Client: We don't have any income.

Intake Person: Ok, I'm going to record $0 for your monthly household income.
<u>You would serve client TEFAP product.</u>

What to do when a client declines to provide information outside of what's required for TEFAP

Intake Person(housing type question) Do you rent or own your home?

Client: I don't want to tell you that.

Intake Person: Ok no problem.
<u>Mark the question as undisclosed. This applies to any question outside of Name, Address, Date of Birth for the head of household, and income.</u>

What to do when a client declines to provide their ethnicity for CSFP

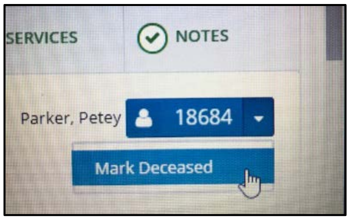
Intake Person (to CSFP client): Are you Hispanic or Latino? What race do you most identify with?

Client: I don't want to tell you that.

Intake Person: Ok no problem.
<u>Make a determination of the client's race and ethnicity and record it in the system. A selection is REQUIRED for CSFP.</u>

What to do when you learn a client is deceased

First, unless you have first-hand knowledge of the client's passing, it's always recommended that you try to reach the client using any contact information they've provided. In the upper right-hand corner of the client profile there's a small white arrow that appears in the client ID section. Clicking on this will open a menu to mark the client deceased.



What to do when a client requests their information be deleted from Link2Feed
Client: I don't want my information in your database any longer. Can you remove me?

Intake Person: Yes, I'll put in a request to have your information removed. It could take up to a week for this to be processed.
Send an email immediately to L2F@foodbankrockies.org with the client ID# and first and last name and request they be deleted from the system.

What to do when a client declines to have their information recorded in Link2Feed
Client: I don't want my information in your database.

Intake Person: Ok, no problem. Please complete this paper TEFAP application.
Record the visit as an anonymous visit in Link2Feed. Store the paper application in a locked file cabinet for review during any audits.

Support

If you need any support we are just a phone call or email away. We will even come to your agency! We can be reached at the following places:

L2F@foodbankrockies.org

Maria Esparza 303-375-5830

April Fautsch 720-473-6323 x32

Kelly Bacher 720-473-6323 x 24

You can also access our sample Intake Video on our website. Visit our agency portal at www.foodbankrockies.org/agency-portal, click on "Forms & Documents", then click on "Link2Feed", and select "Intake Video" from the menu.

In addition, Link2Feed has a robust user manual and training videos inside the portal. Just look on the left-hand side in the black rectangle at the bottom. Click on "Support".

Appendix 1- Our Data Promise

FOOD BANK OF THE ROCKIES

Our Data Promise

Food Bank of the Rockies and our partner agencies (your local food pantry) are collaborating to modernize client intake processes by using Link2Feed (L2F) software. All client information will be stored electronically in the L2F database.

What is L2F? L2F is a secured online database for pantries to manage information regarding clients who are served within Food Bank of the Rockies network.

How Does It Help Me? A full intake process will only be done once! From time to time you'll be asked to verify or update your information. This feature creates faster intake during future visits. The collected information helps your food pantry and Food Bank of the Rockies share accurate information for a clearer understanding of hunger in our community.

What Information Do You Collect? You get to choose what information you want to share with us. If you participate in The Emergency Food Assistance Program (TEFAP) and Commodities Supplemental Food Assistance Program (CSFP), some information is required to determine participation eligibility.

Requirements to Receive Assistance	Pantry	TEFAP*	CSFP*	Other Information not required
Name		x	x	Housing Type
Address		x	x	Education Level
Date of Birth			x	Dietary Considerations
# of people in Household		x	x	Household Information
Income		Self-Declared	Self-Declared	

*Requires information to determine program eligibility which may be self-declared.

We respect your right to choose, and hope you'll tell us more about yourself. We collect this additional information in aggregate to help with future advocacy for funding for more appropriate resources for your community. If you would prefer not to provide certain information, just let the intake staff know.

Our Promise to you

- ***We will treat you and your information with dignity and respect.***
  - If you do not want to provide your information or you feel uncomfortable answering any questions, we respect that choice and will do our best to provide services to you no matter what. We will trust your answers and will always provide our best service.
- ***We will keep your information safe and secure.***
  - We will guard the information that you provide us to the best of our ability. We will not share your personal, individual information with anyone outside of this partner network.
  - L2F has a high security standard (similar to the banking industry).
  - Recording information is much safer than recording it on paper!
- **Who can access my information?**
  - Only certain people can log into the system. Your pantry and the Food Bank can run reports to look for trends and learn more about the community. Reports will not be able to identify you.

This institution is an equal opportunity provider.

Appendix 2- Sample Link2Feed Poster

What is Link2Feed?

Link2Feed is a networked client intake software that allows us to safely and privately collect and report on the needs in our communities.

What will I be asked to share?

Basic information about your household to assist us in determining best services to you.

Requirements to Receive Assistance by program	Agency Name	TEFAP*	CSFP*
Name		x	x
Address		x	x
Date of Birth			x
# of people in Household		x	x
Income		Self-Declared	Self-Declared

*Requires information to determine program eligibility which may be self-declared.

<u>All other questions are optional</u>.

No services will be denied if you choose to not to answer the remaining questions.

Will this limit my services?

Information will not be used to limit or deny services at this pantry or any other pantry.

Who can see my information?

- Only authorized users of agencies where you seek service.
- All reporting is <u>ANONYMOUS.</u>
- Link2Feed has high security standards, similar to those used at your banking institute.

Our Data Promise:

- All information will be kept private within Food Bank of the Rockies network.
- No individual/personal information will be shared with the government or any outside parties.
- Recording information on Link2Feed is safer than recording it on paper!

How will my information help?

Increase efficiency: You will only need to go through the intake process one time at any agency using Link2Feed, this will avoid having to fill out multiple applications at every visit.

Help your community: The more information we have, the better the services we can recommend.

Advocate: Link2Feed's up-to-the-minute reporting will allow us to advocate (for the needs of our communities) directly to those who can help us with funding and resources.

Get connected: We believe that we are stronger together. Being connected through Link2Feed helps our network better share resources, provide better referrals, reduce wasted food, and pass those resources on to those who need them.

We respect your privacy, and it's your choice to provide additional information at intake.

If you have any questions please contact Food Bank of the Rockies at:

303-371-9250 or 720-473-6323 or L2F@foodbankrockies.org

For a copy of our Data Promise please ask any staff or volunteer.

~This institution is an equal opportunity provider~

Appendix 3- Memorandum of Understanding

Memorandum of Understanding (MOU) by Link2Feed (L2F), Food Bank of the Rockies (FBR) and

____

Partner Agency Name

______________________________ (referred to as User) will be setup as a

☐ Manager Role Client ☐ Intake ☐ Services

Access Control: User will not permit sharing credentials, passwords, or any other information in the Lini2Feed system to any other users within or outside of organization.

- All assigned users must read, understand and sign MOU prior to receiving L2F password and accessing the data base.
- Partner Agency will retain signed MOUs on file for auditing purposes.
- Partner Agency will maintain users by reviewing users on a regular basis to include but not limited to: reassigning user roles, deleting inactive users, changing Two Factor Authentication password.
- Partner Agency along with User will adhere to any policies and procedures that are put in place by FBR and L2F.
- User will be trained and capable to enter information into L2F correctly following confidentiality protocols.
- User will not access data base outside of Partner Agency's facility and operational hours.

Client Confidentiality Protocols: It is the **policy** that all client information is kept confidential both during services and after services. Confidential client information should never be discussed in the presence of third parties.

- Partner Agency and User will maintain all confidential client information and refuse to share information to non-partner agencies or in the presence of third parties outside of FBR's partner agency network.
- Client data provided by the client and collected by User will be stored and maintained by L2F.
- User will treat all clients and their shared information with dignity and respect.

Data Collection: Partner Agency and User will collect required client data information to ensure eligibility for specific food programs while upholding maximum confidentiality and security.

- Clients will be made aware of FBR & L2F disclosure poster and have access to take away material at their request. Ensuring clients can request to have their information removed and/or deleted.
- Partner Agency and User will receive client consent prior to entering personal information into L2F.
- Client will not be denied services, if they choose to not have their information captured in L2F.
- Clients will be informed of required information needed for program eligibility. Additional client info will be optional and collected as "undisclosed" if not shared.
- If client information is entered incorrectly User will promptly be corrected by Partner Agency or Manager User.
- Partner Agency and User will not enter erroneous, inappropriate or unnecessary data into the software to include but not limited to: Social Security Numbers, Birth Certificate, or Immigration Status of client.
- Partner agency will not enter any profanity, offensive language, malicious or discriminatory comments based on race, ethnicity, religion, national origin, disability, age, gender or sexual orientation, or any other protected class.
- Data and client information will only be used for purposes of increased services for clients.

By Signing this Memorandum of Understanding, you agree to the terms of upholding the highest security and ethical standards in regards to client data.

L2F User: ____ Date Signed:_____________

Email: ____

FBR USE ONLY:
CODE: ____________________

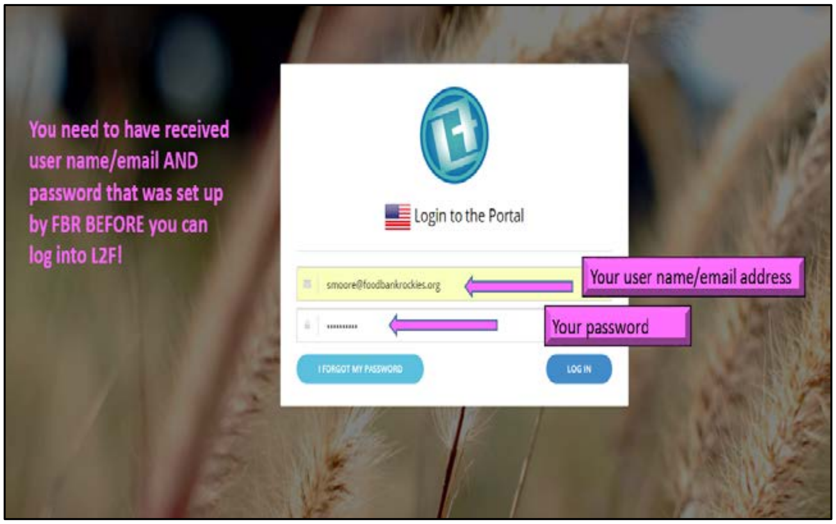
Appendix 4- Select User Manual Pages

Logging In

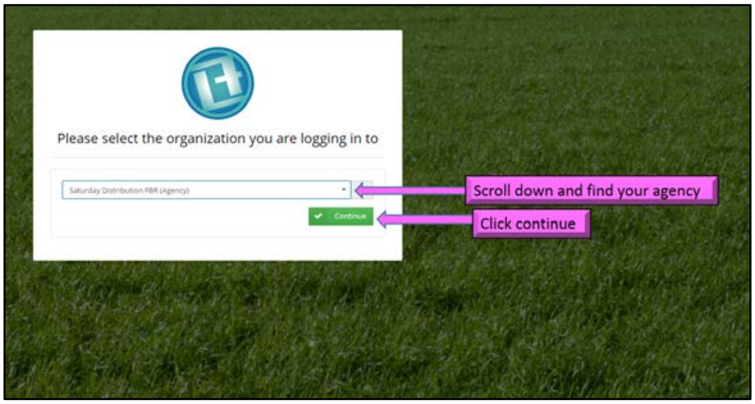
Visit: portal.link2feed.com **or test account:** test-accounts.link2feed.com

Username: Your Email

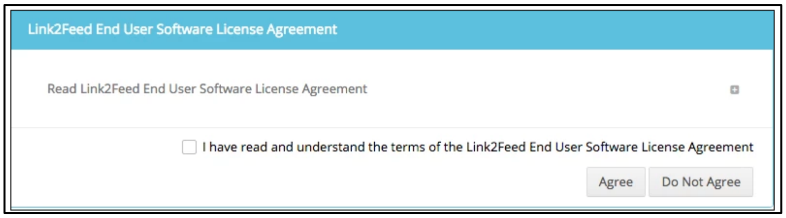
Password: Your Password



Next Screen: If you manage more than one site, will select the appropriate organizations name. Otherwise, click continue.



For the First time you login you will find the EULA (End User Licensing Agreement)



Agreeing to the License Agreement. Read the full version here:

http://link2feed.com/us-contract-and-licensing/

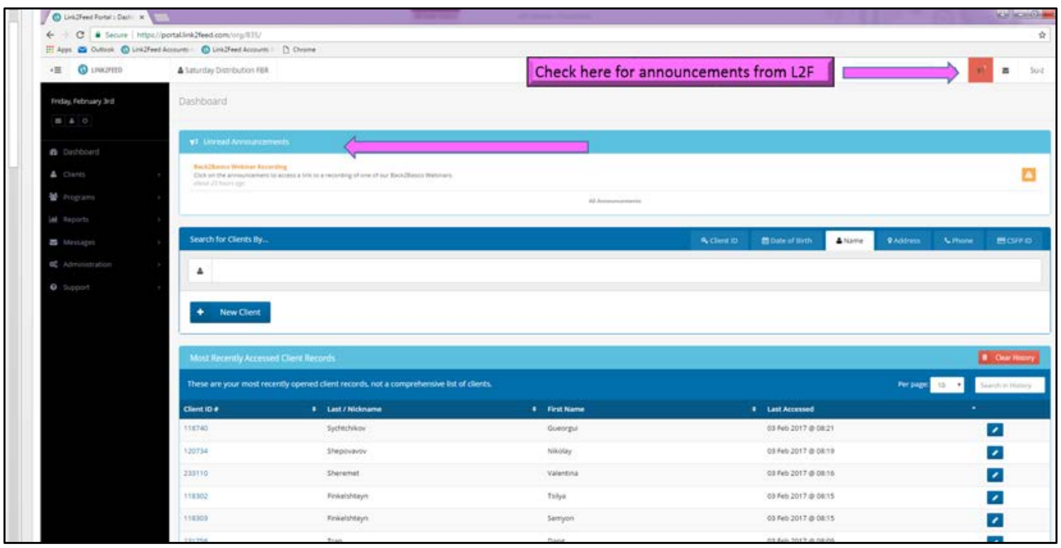
Two Factor Authentication Code

When you are signing in from a device for the first time, you will be prompted to enter an agency password. This is the two-factor authentication code given only to Agency Managers.

- This code will be required by all users to type in as a secondary password to prevent users from gaining access to the system outside of permitted locations.

Portal Announcements

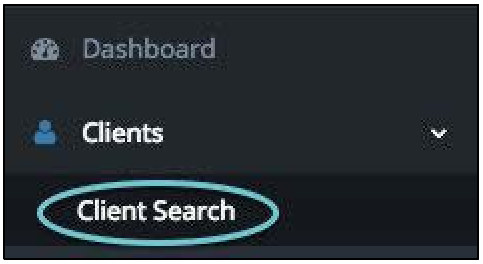
Portal announcements are messages from Link2Feed to users.
Priority vary from high, medium, low. High is a red banner.



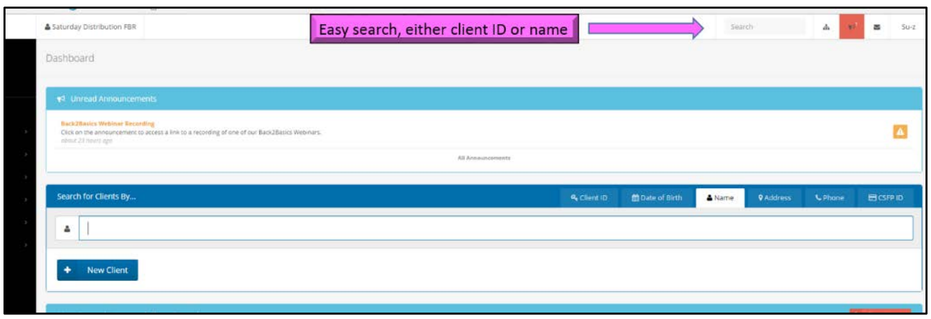
Navigating L2F

Client Search

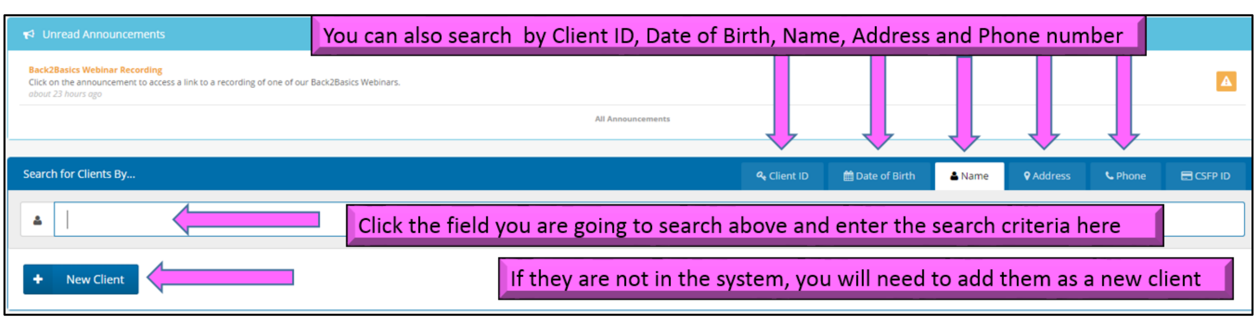
1. Click on the "Clients" heading. Click on "Client Search".



2. Use the search bar to search for your client. You can search using the following characteristics of ANY individual within a household:

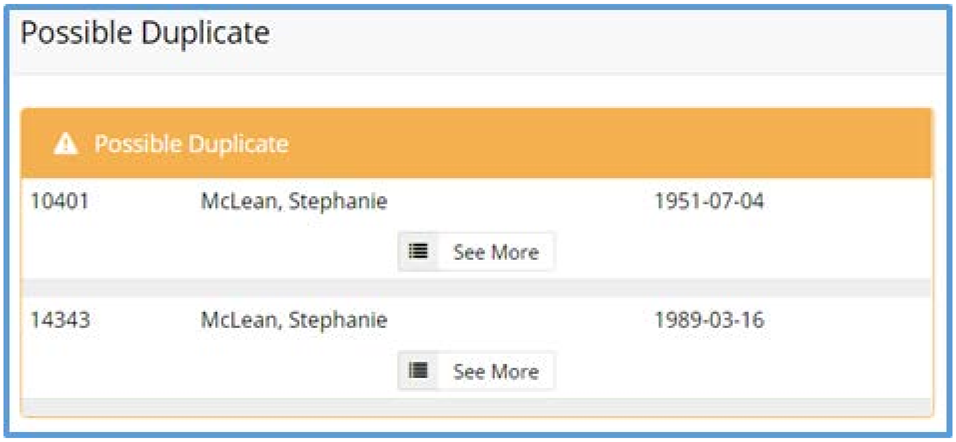


- First Name
- Last Name
- Last Name, First Name
- First Name Last Name
- %(partial word) (e.g. if looking for anything with "rian" anywhere in the first or last name, type "%rian")
- Date of Birth
- Client ID#
- Street or Full Address
- Phone Number

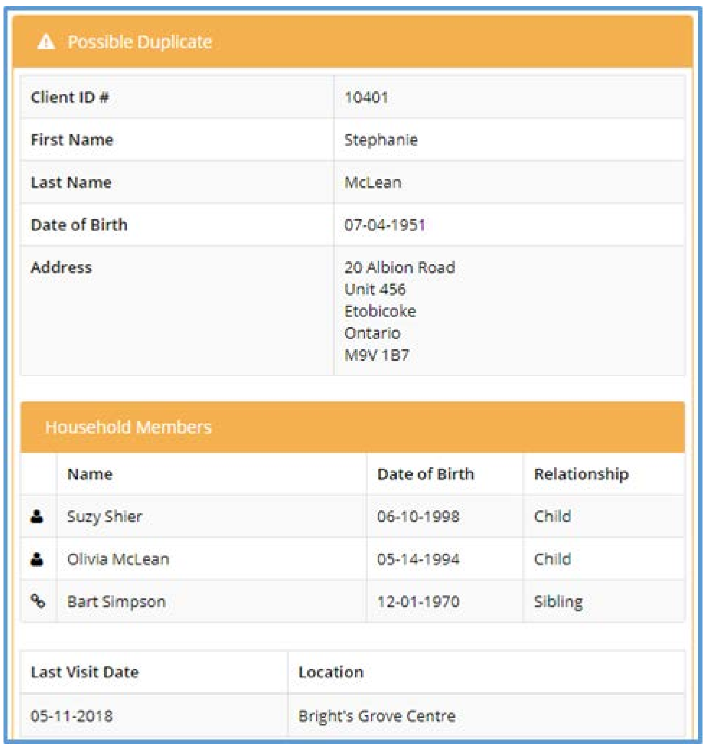


"Possible Duplicate" Pop Up

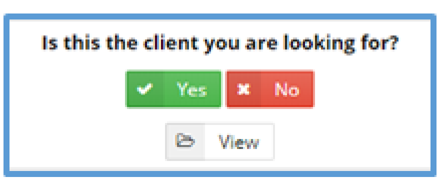
When you add a client with the same first name, last name, or date of birth, an orange “Possible Duplicate” box appears. This will pop up in the middle of the screen.



The system will give you a small preview of the possible duplicate’s information.



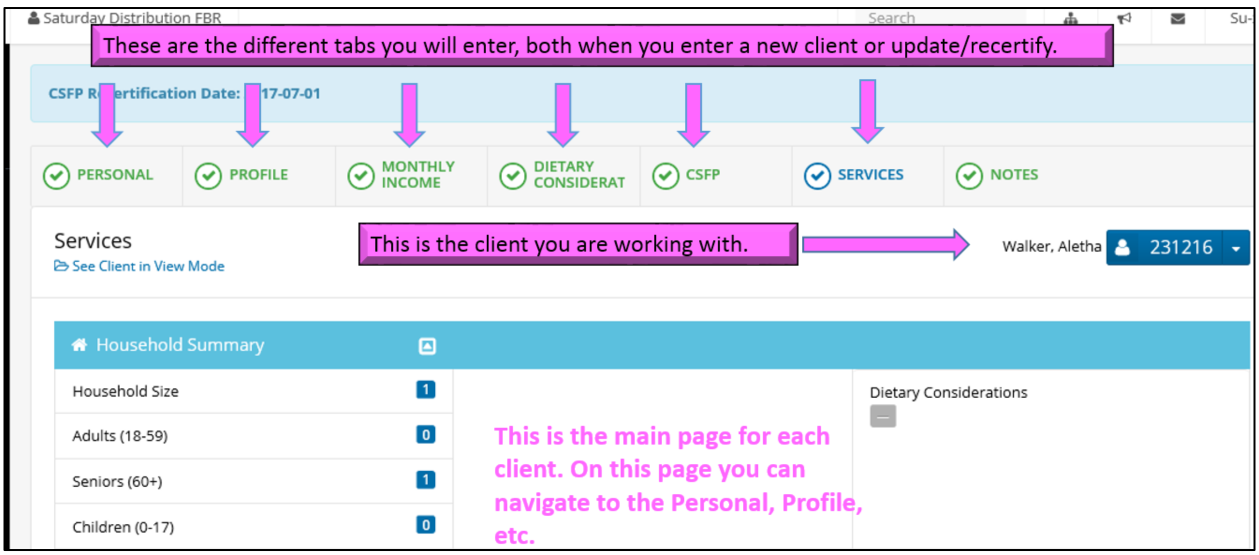
You will need to select “Yes” or “No”. “Yes” will take you to that possible duplicate’s profile. “No” will take you back to the profile you were creating. “View” will you show you a more detailed profile of the possible duplicate if you need more information to verify.



Intake

For each client profile you will see the following screen. Go through each tab:

Personal
Profile
Monthly Income
Dietary Consideration
CSFP (if your organization is a CSFP site)
Services
Notes
The more information that you gather, the better reports you will be able to gather for your partner agency.
*Note if the client does not want to give you the information click on “UNDISCLOSED”

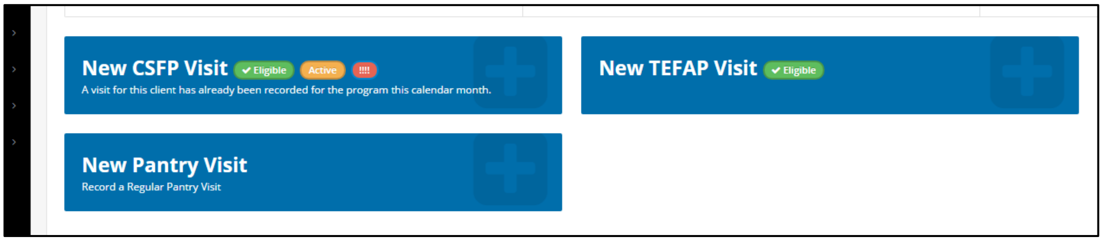


Under the SERVICES tab is will you will record the Pantry Visit or CSFP/TEFAP Visit.

1. Click on the "Services" 

page within your client's profile.
2. The "Eligible Programs" section in the Household Summary box at the top of the screen will indicate what programs the client is eligible for:

3. Click on the services that the client is receiving:



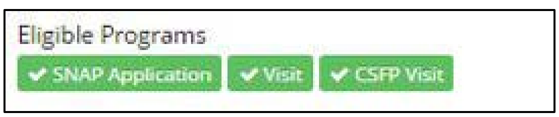
CSFP/TEFAP Visits in Link2Feed:

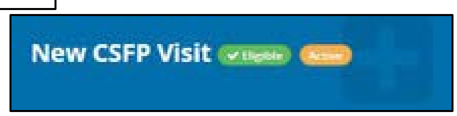
CSFP:

Intake
NOTE: Adding a CSFP Visit is only for this particular individual. This visit does not apply to other household members like in a general emergency food pantry visit. The CSFP Tab for the particular person receiving food needs to be filled out before recording a visit in their profile.

1. Click on the "Services" 

page within your client's profile.
2. The "Eligible Programs" section in the Household Summary box at the top of the screen will indicate if the client is eligible to have a CSFP visit.

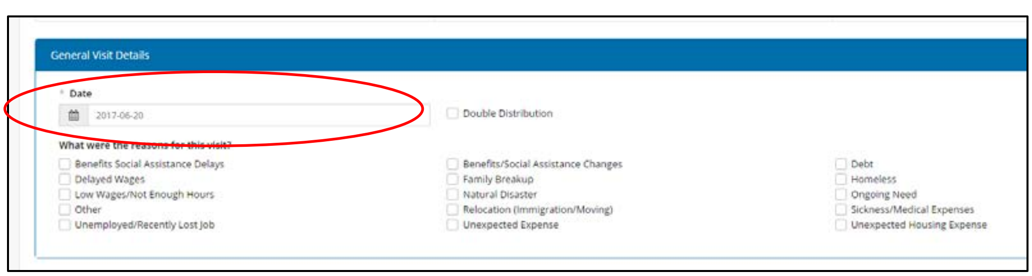


3. Click on the "New CSFP Visit" 

button to add a visit.

Eligibility
NOTE: if the client isn't eligible for a CSFP visit, this button will be greyed out and you will not be able to record a visit.

4. Select the date that client received a food box.
The date will automatically be today's date.



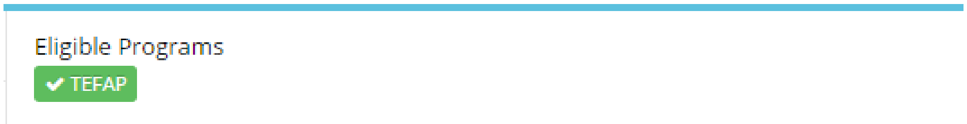
TEFAP:

Intake

The TEFAP tab for the particular person receiving food needs to be filled out before recording a visit in their profile.

1. Click on the "Services" 

page within your client's profile.
2. The "Eligible Programs" section in the Household Summary box at the top of the screen will indicate if the client is eligible to have a CSFP visit.



3. Click on the "New TEFAP Visit" 

button to add a visit.

Eligibility

NOTE: if the client isn't eligible for a TEFAP visit, this button will be greyed out and you will not be able to record a visit.

When you are filling out the client's TEFAP tab in their profile, it will also tell you if they are eligible or not.

- If they are eligible for a criteria, it will be green
- If they are not eligible for a criteria, it will be yellow

Proxy Signatures

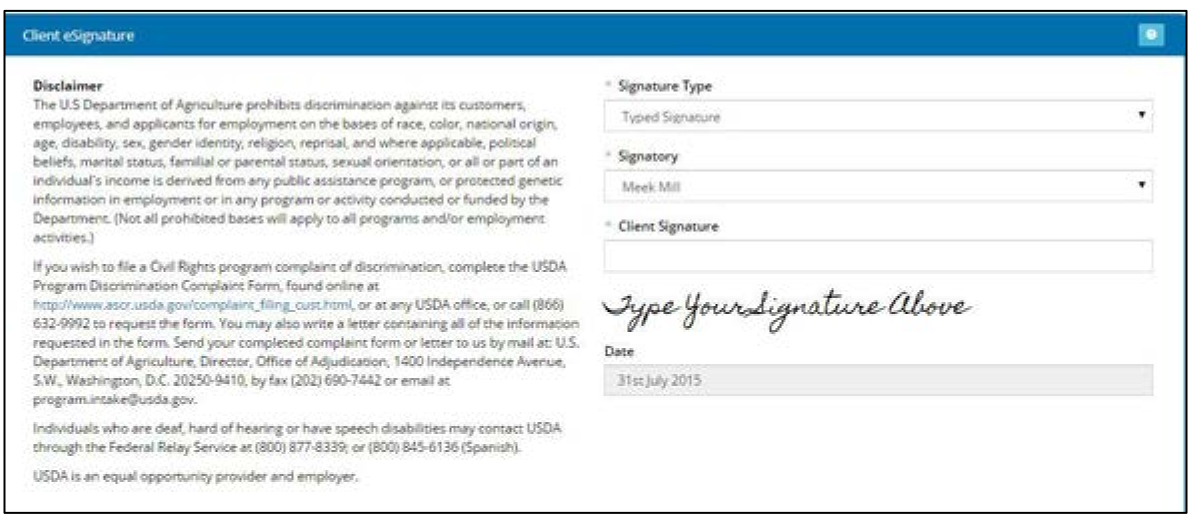
This feature allows users to add up to three proxies to be added to the client's profile. The proxies can pick up CSFP or TEFAP commodities on behalf of the client.

These proxies will also show up on the "New Visit" page in case they pick up food for the client.
On the TEFAP tab number just above the client ID, a notification says "If this client is not a TEFAP client, click on the "Services" tab to record a visit"

The TEFAP tab does not have to be filled out if the client is not a TEFAP client.

Client eSignature:

- Signature Type: Depending on the CSFP/TEFAP site and the type of signatures they allow to be collected, it can include "Typed Signature", "Uploaded Image", "Sign on Screen" or "Hard Copy Signature"
- Signatory: select who this signature belongs to (it could be one of the proxies)
- Client Signature: the signatory's typed name
- Date: the date will automatically be today's date



Click on the "Save" 

button to save changes or "Cancel" 

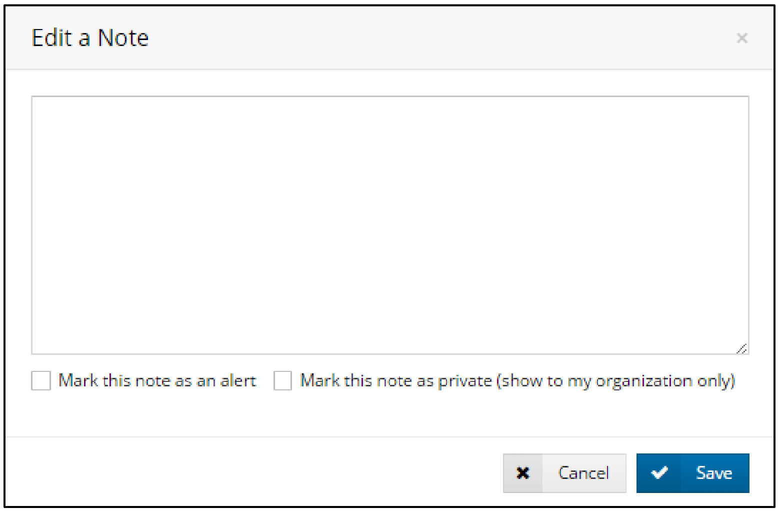
to discard the changes.

See "[How do I Add a Visit]" and click on your appropriate module to learn more details of how to add a visit.

Adding Client Notes

This page allows you to add a new note to the household's profile.

- Click on the "Add a Note" button to create a new note.



- Type your note.
- Check off the checkbox beside "Mark this note as an alert" to set the note as urgent. This will display the note on the top of each page of the client's profile.
- Checking off "Mark this note as private" will restrict the note to be seen only be users within your organization.
- Click on the "Save" button to save changes or "Cancel" to discard the changes.

On the Notes page:

- Information will show indicating who wrote the note and when
- Edit: allows you to edit the note, including the text and alert status
- Delete: allows you to delete the note
- the "!" notification shows that the note has an alert status
- Any notes entered by a user within your distribution network can now be edited or deleted by any other user within your distribution network

  Notes

The "Notes" feature can also be found at the bottom of the page when adding a visit. You can add a note and set it as an alert status in the same way as a regular note. These notes will appear on the Notes page.

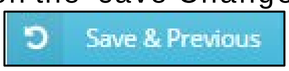
How Do I Update an Existing Client?
Step-by-Step Guide

1. Refer to How Do I Search for Clients? to see two ways how to search for a client.
2. Updating an existing client is very similar to creating a new client.
3. Use the tabs along the top to switch between headings of your client's profile.

4. Click on the "Edit"  icon to edit a household member's information.

5. Click on the "trash"  icon to remove a household member or income type.

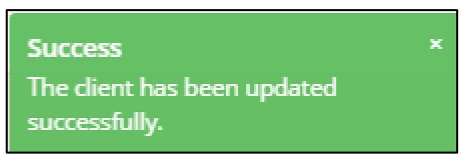
6. Click on the "Save Changes" 

button to save your changes. Click on the "Save & Previous" 

to go to the previous page or the "Save & Next" 

button to move on to the next page.

7. Notifications will appear to let you know when your changes are saving and have been successfully saved.



Forced Review

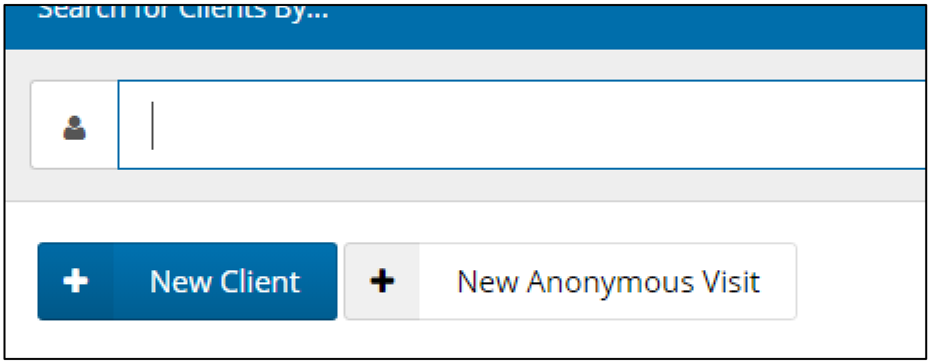
Link2Feed has a "Forced Review” feature that is defaulted to force users to review client profiles at least once a year. Click here to learn more on where that feature can be altered to force users to review files more frequently.

Anonymous Intake

This visit should be used for clients that do not want their information on our database. Your agency is still required to track this visit in L2F as an anonymous visit. Paper applications must be completed by the client in lieu of L2F intake for TEFAP. This is not an option for CSFP.

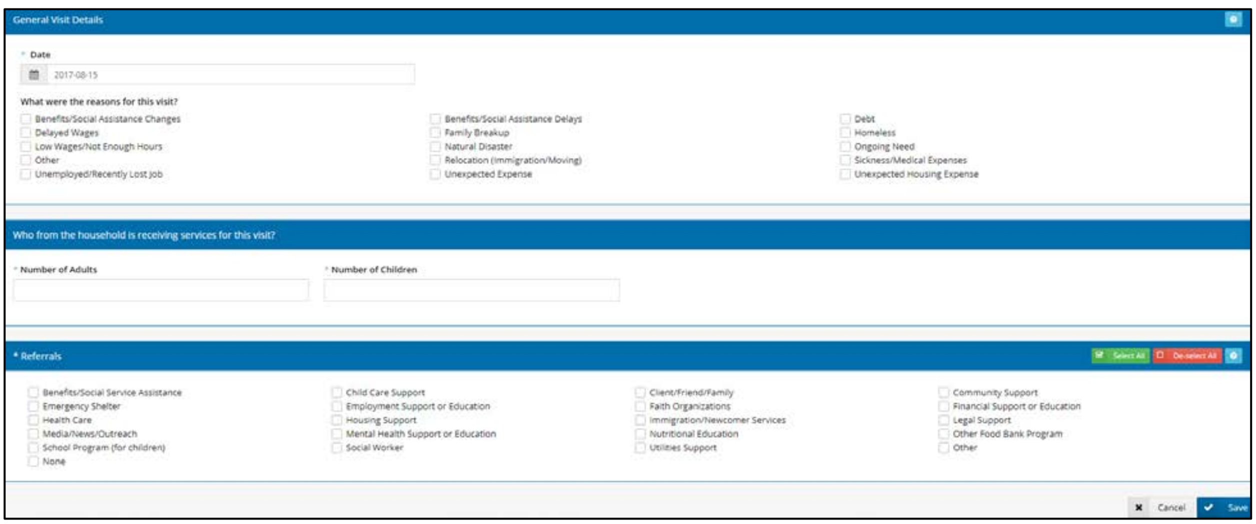
This feature can ONLY be done for a Pantry Visit or TEFAP Visit if the client requests a paper form.

1. Click on New Anonymous Visit



2. Click on New Pantry Visit

3. Fill in the general visit details.
4. Click Save



Adding Users

As we mentioned, the Link2Feed system has several "roles" that can be assigned to a user. These allow access to various features. Some roles have to be granted especially. The following table lists all the roles that are currently in use:

Understanding User Roles

The Link2Feed system has several "roles" that can be assigned to a user. These allow access to various features. Some roles have to be granted specifically. The following table lists all the roles that are currently in use:

The profiles below provide a suggestion of the roles each user should have depending on what they do at the food bank

Intake: Intake

Agency Manager: Agency Manager, Intake, Reporter, Duplicate Checker

Network Administrator - Network Admin, Intake, Reporter, Exporter, Duplicate Checker

When adding roles to a user, it is important to always **only** assign what the user needs to do their job. If someone does not need to run reports, don't assign the Reporter role. Similarly, if someone needs to run reports but does not need direct client access, don't assign the Intake role.

Permissions

- by default all the Manager roles do NOT have access to client data. This is to protect clients.
- by default no one has access to reports.

Link2Feed therefore recommends that there is always at least one Agency Manager who has the Intake permission to aid with intake and to review client information. Agency manager needs to be added by FBR Staff after attending a training. Only 2 persons per program, and only they can pull reports for entire partner agency.

- Agency Manager can add Agency Intake, and below.

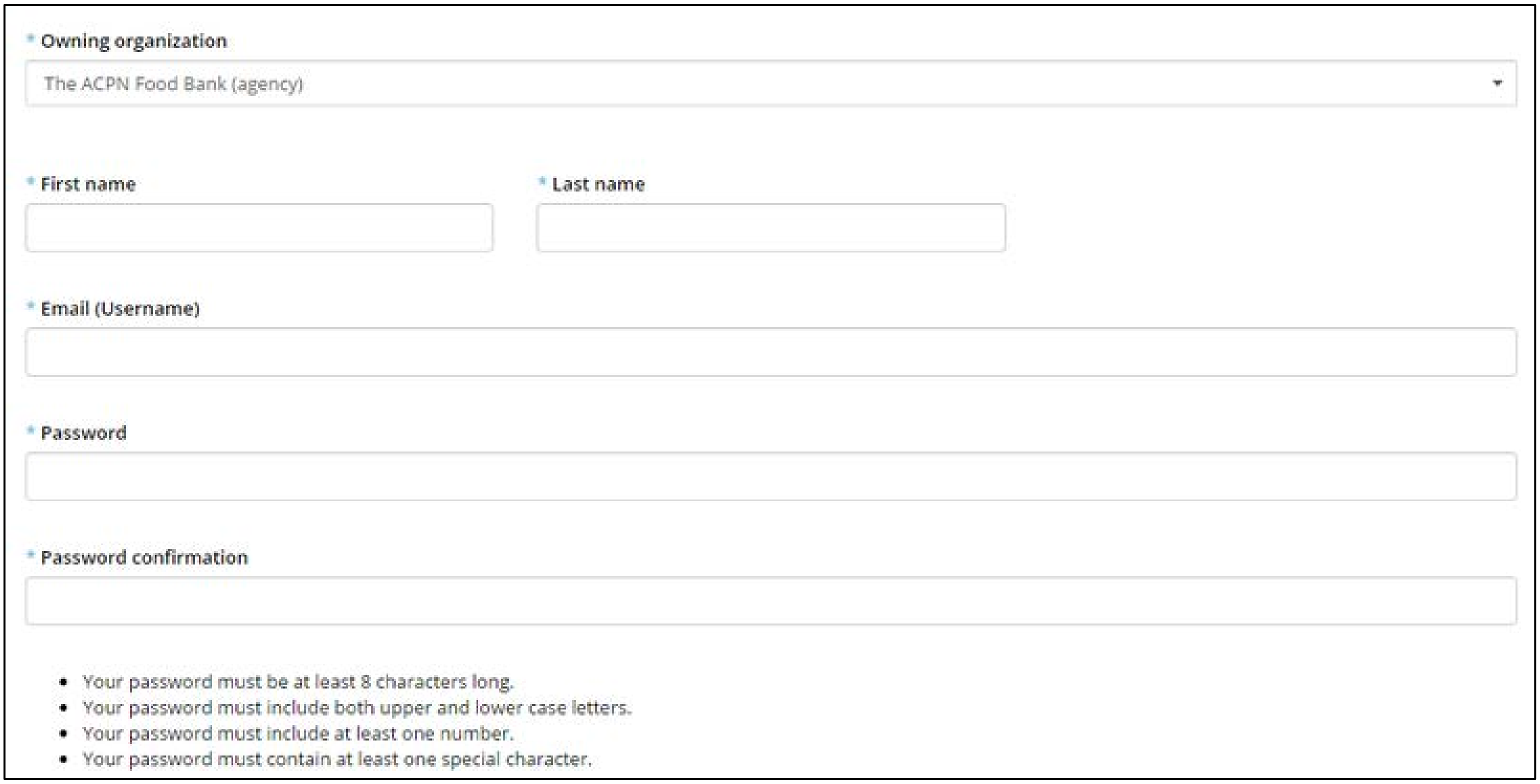
Adding a User:

Only Agency Manager Roles (refer to page 15) will be able to add and edit users.

1. 

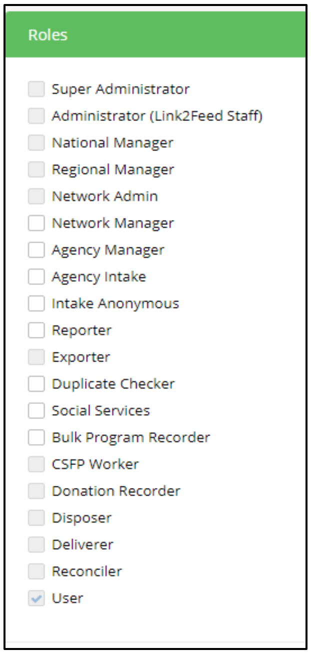
Click on the "Administration" heading. Click "Users".
2. Click on the "New User" 

button.



- Owning organization: the organization the user is primarily associated with
- First name / Last name: the user's first and last name
- Email: the user's email address. This is the information they will use to log into the system. If a valid email is not provided, they will not be able to receive password reset notifications or any other communication from the system.
- Password/Verify Password: the initial password the user will use to sign in for the first time. They will be asked to change their password after logging in.

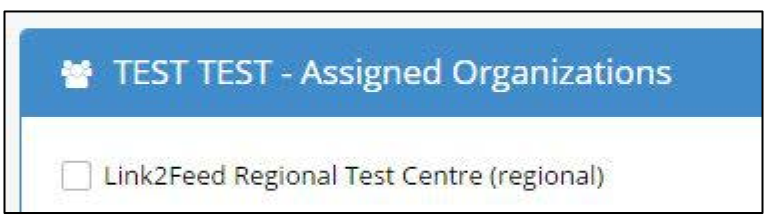
User Details



- Roles: see the definitions of all the roles (pg. 18) to choose which ones are relevant to this user
- Enabled: all new users are defaulted to "Enabled", this means they can access the system. If "Enabled" is unchecked, the user won't be able to log in.
- Click on Save & Next 

.

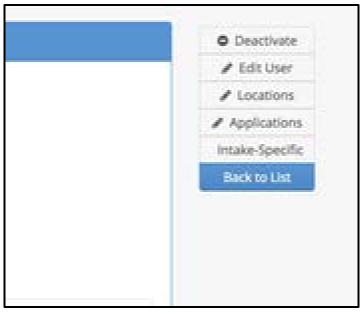
Locations



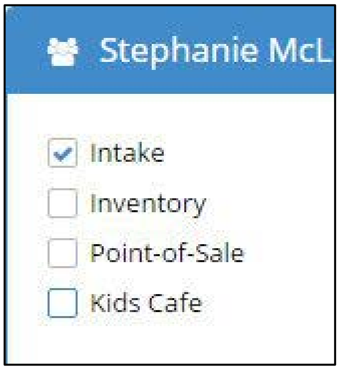
- The Locations page will list all of the organizations you have access to based on the Owning Organization you selected on the previous page, and your role in the system.
- Click on Save & Next 

.

Applications



- This page will display all the applications available in Link2Feed, despite if your organization has access to it or not
- Select Intake

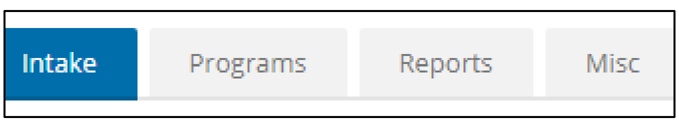


Click on Save & Next 

.

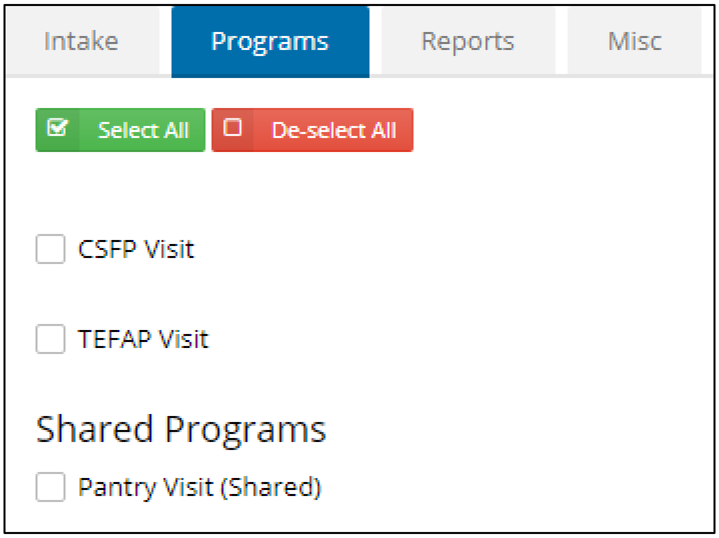
Intake-Specific

These are the tabs you have in your profile related to the client intake system, including Programs, Intake, Reports and Misc.



Programs

This page will display all the programs that are associated with the user. Click on the programs that the user can use to record client intake:

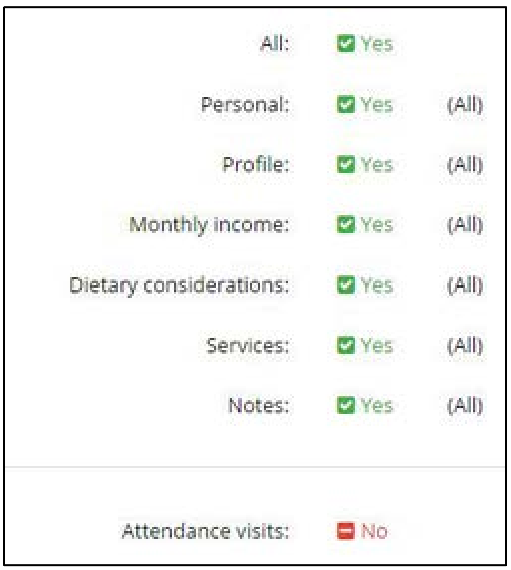


- Click on the "Save & Next" 

button to save changes or "Cancel" 

to discard the changes and return to the Users page.

Intake



- Select the client intake pages the user should have access to
- Click on the "Save & Next" 

button to save changes or "Cancel" 

to discard the changes and return to the Users page.

Reports

- Select the reports the user should have access to

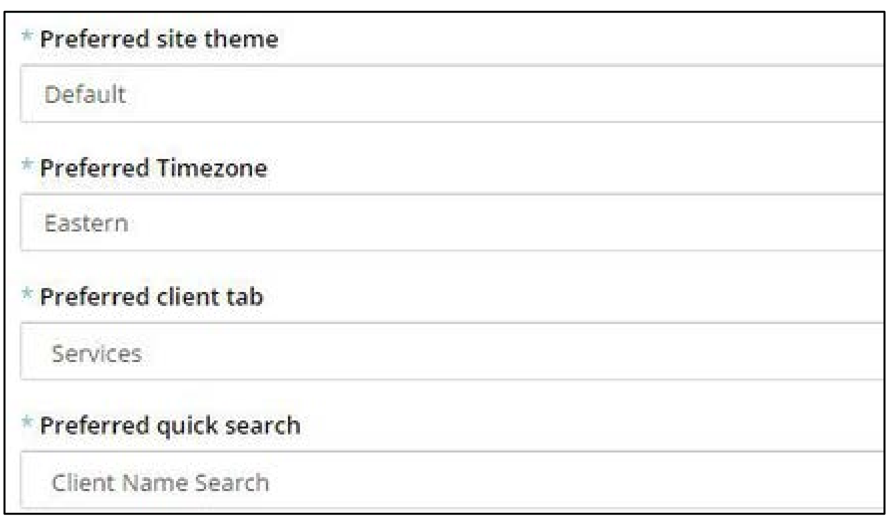
The system will notify if you have forgotten to check off the "Reporter" role. The user would need this role checked off in their profile in order to view any reports you've checked off on this page.

- Click on the "Save & Next" 

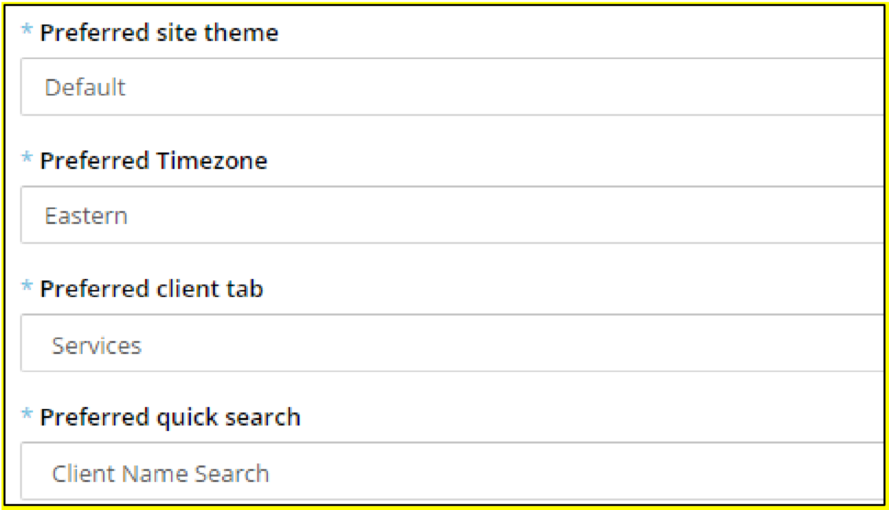
button to save changes or "Cancel" 

to discard the changes and return to the Users page.

Misc.



Misc.



- Preferred client tab: what page of the client's profile would you like to see first after clicking on their name to access their profile
- Preferred quick search: what search tab would you like to see first on the dashboard when searching for a client

How Do I Remove/Unlink a Household Member?

Removing a household member DOES NOT delete them from the system. Clients cannot be removed from the system for data integrity purposes. Removing them from a household separates them from the one they're in and creates a new household for them.

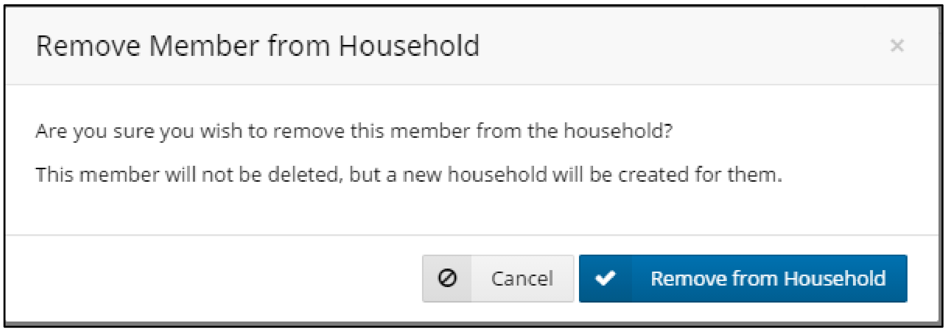
Step-by-Step Guide

1. Refer to How Do I Search for Clients? to see two ways how to search for a client.
   You'll want to search for another person in the household of the person you want to delete. For example, if Bill and Sue live together and you want to delete Sue, go to Bill's profile.
2. Go to the Personal page of the client's profile.

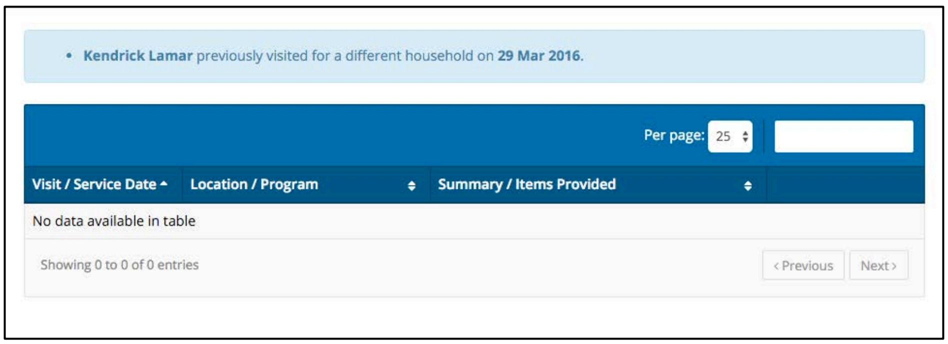
4. Go down to the "Household Members" section.

5. Click on the "trash"  icon beside the household member's name to remove it. 

6. A notification will appear asking you to confirm if you'd like to remove this member from the household. It also clarifies that the member is not being deleted, but put into a new household.

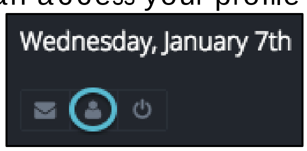


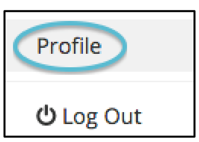
When someone is removed from the household, a notification will appear on the Services page of their new household, indicating the most recent date of their visit in their previous household. All their visits from their previous household are still in the system, but not visible. The notification of the last visit date from the previous household lets the user know the client was in a previous household and when that last visit was.



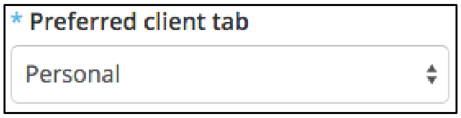
How Do I Set My Preferred Client Tab?

Step-by-Step Guide

1. You can access your profile two ways:
   1. 

      Click on the "Profile" button underneath the date on the left sidebar.
   2. 

      Click on your name on the top right of the page; click on "Profile".

2. 

Locate the "Preferred client tab" section below the Preferred Timezone field. Choose from the drop-down list what tab you would prefer to be directed to when first accessing a client's profile.
3. Click on the "Save" 

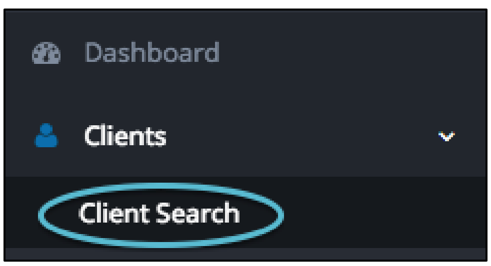
button to save changes or "Cancel" 

to discard the changes.

How Do I Add a New Client?

If you are creating a new client and don't complete all of the fields (up to the "Services" page) within 72 hours of the profile's creation, the client's profile will be removed from the system. A notification now appears each time a user is adding a new client to remind them of this.

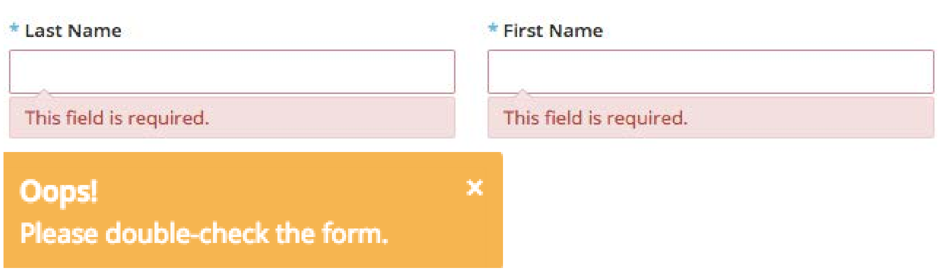
Step-by-Step Guide

1. 

Click on the "Clients" heading. Click on "Client Search".
2. To add a new client, click on the "Add New Client" button under the search bar.

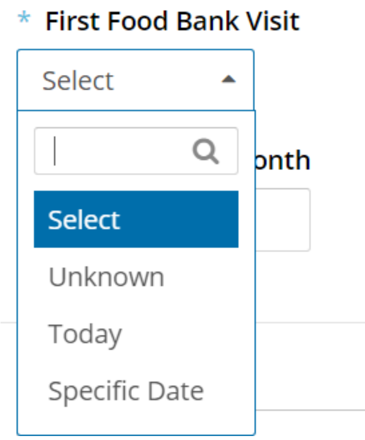

Fill in the fields under each of the tabs listed in the profile.

Required fields are starred with blue asterisks. If a required field is left blank when attempting to proceed to the next category, you will be prompted to fill in the required information.



Personal Information

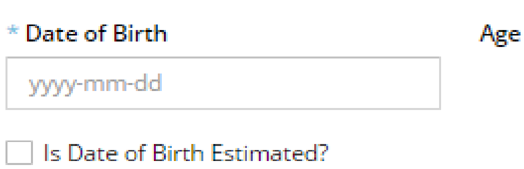
This page allows you to collect personal information about all individuals within the household. This includes, but is not limited to, first and last names, date of birth and residential information.



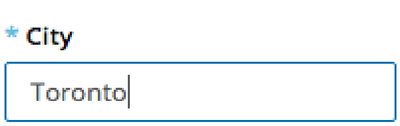
You will be prompted to select the estimated month and year of the first food bank visit. There are three options:

- Unknown: the first food bank visit within that household will be saved in the back end as the client's first visit to the food bank
- Today: the present date this profile is being created
- Specific Date: allows the user to enter the approximate year and month the client actually started attending the food bank, not just within Link2Feed.

A client's "Status" will be set to inactive if they have not visited the food bank in six months. If they are to return, their status will be set back to active after a visit has been recorded.



By entering the date of birth, the age will automatically calculate. If this date is estimated, you can check off the "Is Date of Birth Estimated" checkbox underneath this field.



- When typing in a name of the city, suggestions will come up based on the cities you already have in your list and auto complete the name for you.
- If the city you have typed in is not listed, the system will still accept what you have typed

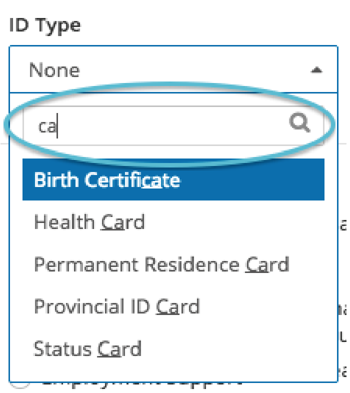
- Click on the "Add" button to add email addresses and phone numbers of the client.
- The drop-down list on the right allows you to choose the category.
- The red "X" icon allows you to delete the item.
- The radio button to the left allows you to choose the primary method of contact.

Primary Option

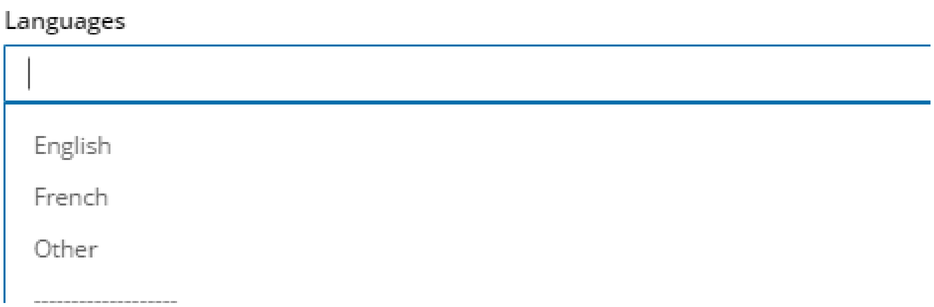
Both the phone and email options automatically choose the first entry if there is only one entered. So, for example, if one phone number and one email address were entered without clicking on the "primary" option, it would allow the user to continue. This is saved in the back end.

- The word "Confirmation" will appear beside an individual's "ID Type" to allow you to type in a validation to confirm the piece of ID has been seen.
- Examples include: yes/no, the user's initials or the expiry date on the ID.

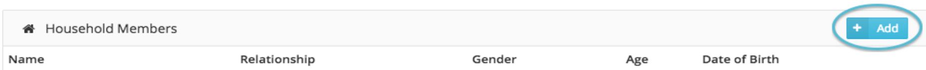
Drop Down List



If you have a drop-down list with several options, you can use the search bar at the top of the list to type in the first few letters of the word(s) you're looking for. This will narrow down your options and help you to sooner find the list item.

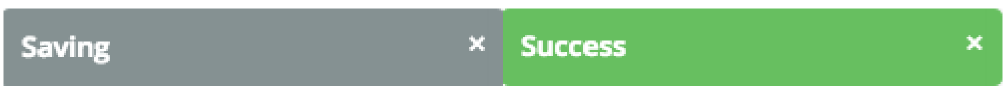


To record languages spoken within this household, start typing in the name of the language and your options will appear automatically. Click on "Enter" on your keyboard or select the language with your mouse to select it.



- Click on the "Add" button to add information about other members in the household.

A notification will show at the top right of the screen indicating that your changes are being saved (whether you clicked the "Save" or "Next" button). The notification will turn green when your changes have been successfully saved.



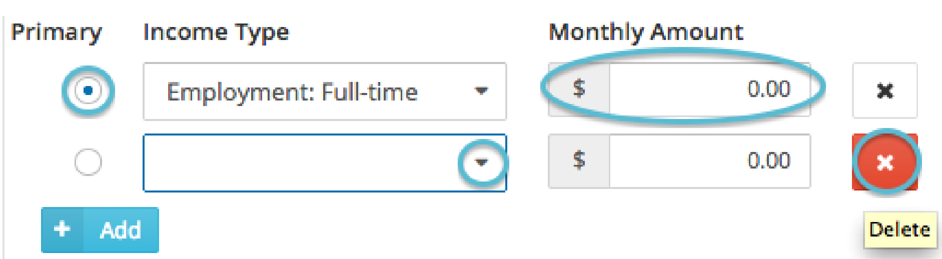
Profile Information

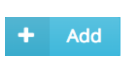
This page allows you to collect more background information on the client first listed on the "Personal" page.

Monthly Income and Expenses

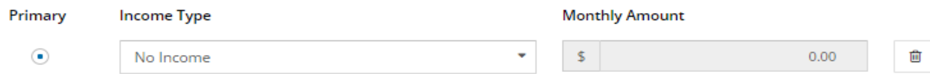
This page requires you to collect income information about the adults in the household.

- Check off the checkbox beside "Show all household members" to collect income information on all individuals within the household.



- Click on the "Add"  button to add an income source.

- Choose the income source from the drop-down list.
- Add as many sources that apply.
- You must select the radio button beside the income type that the household or individual considers to be the primary income source



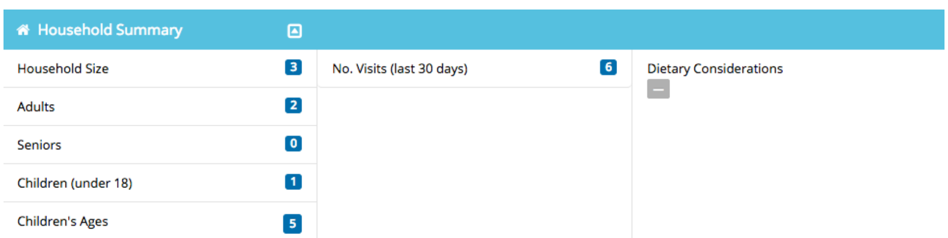
If you select an Income Type of "No Income", you won't be able to enter a monthly amount or add any other income types for this individual.

- The system will automatically add up the total income amounts of each individual.
- Use the radio button to the left of the income source to choose which type is the main primary source for that individual.
- Monthly expenses can be added in the same way as income sources.
- The system will calculate the household's total income, total expenses and total net income.

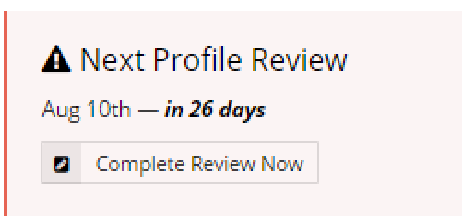
Dietary Considerations

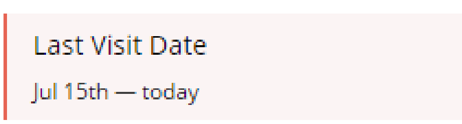
Check off any dietary considerations that the individuals of the household feel should be known and noted in their profile.

Services

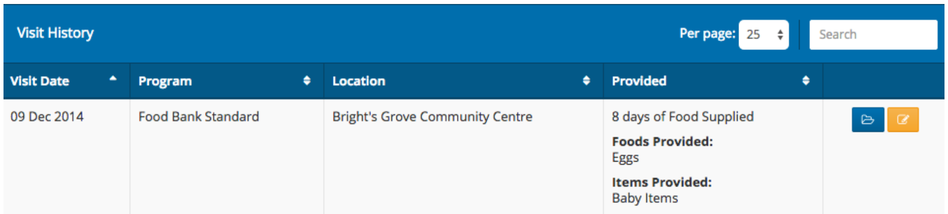


This page provides you with a summary of the household's information. This is the page used to add a visit.





The Personal and Services page will always indicate when the client's next profile review is scheduled for and their last recorded visit date.



Visit History — Per page: 25 — Search

Visit Date	Program	Location	Provided	
09 Dec 2014	Food Bank Standard	Bright's Grove Community Centre	8 days of Food Supplied **Foods Provided:** Eggs **Items Provided:** Baby Items	

Search

The "Search" text box can be used to filter visits on the client's Services page. For example, you can search for visits when particular programs were accessed or particular provisions were provided. Type in part of the program or food/item provided in the search box to filter your results.

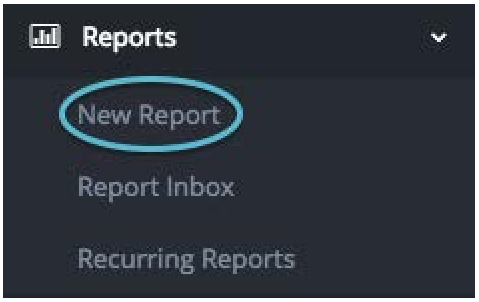
You can also see a list of the client's previous visits and its details

- Visit Date: the date of the visit
- Program: they type of service accessed
- Location: the location of the visit
- Provided: amount of food provided, including specific foods and/or items, if applicable
- Click on the "View" (folder) icon to see details on a particular visit
- Click on the "Edit" (pencil) icon to make any changes to the provisions or quantity of food provided to the household

Permissions:

Not all users will have permission within their security profile to edit a visit. If you do not have access to edit a visit, please contact your food bank administrator to edit the visit or provide you with the access to do it.

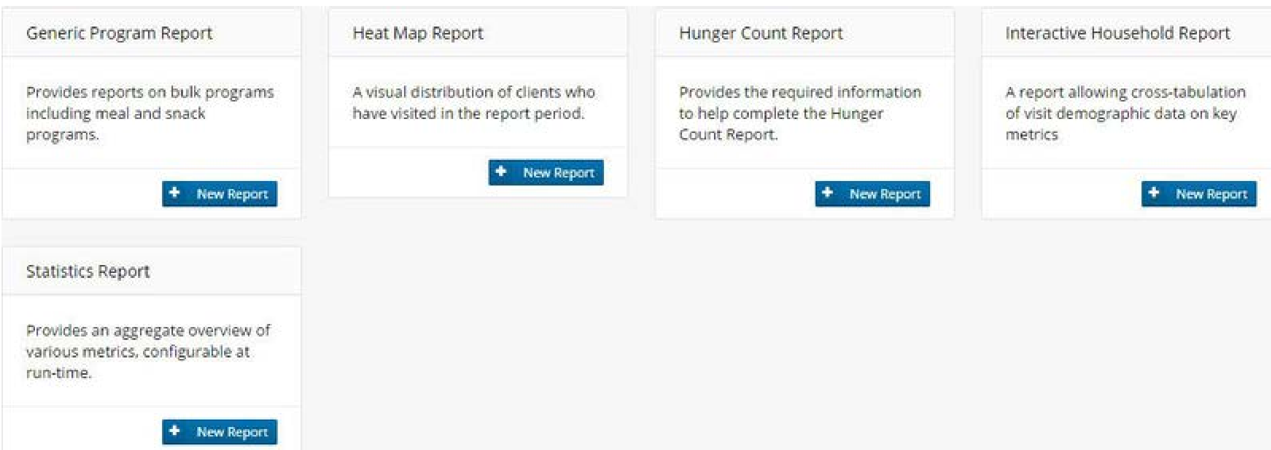
Reports



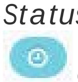
The "Reports" heading can be found underneath the "Clients" heading.

New Report: click on the "New Report" button. A list of reports available will appear. Each report contains a description. Click on the "New Report" 

button under the report's description.



Report Inbox: all reports created will be filed in the "Report Inbox" section. It lists the following:

- *Title:* the title of the report
- *Requested:* the date and time the report was requested
- *Status*: the report can have one of four statuses
-  Queued/Scheduled: your request has been received and is being arranged

- Completed: this report can be viewed now
- Refreshing: this report is currently rendering
- Expired: this report was requested more than 72 hours ago and needs to be refreshed to be viewed

Reports can be run at any time, including on a schedule to recur. To keep the amount of data Link2Feed has to manage at reasonable levels, compiled report data will be deleted after three days. The report will still be available, but will need to be refreshed to retrieve the data. The refresh will use the same settings that were first requested on that report.

- Click on the "View" icon to view the report
- Click on the "Refresh" icon to refresh the report
- Click on the "Trash" icon to delete the report from your inbox

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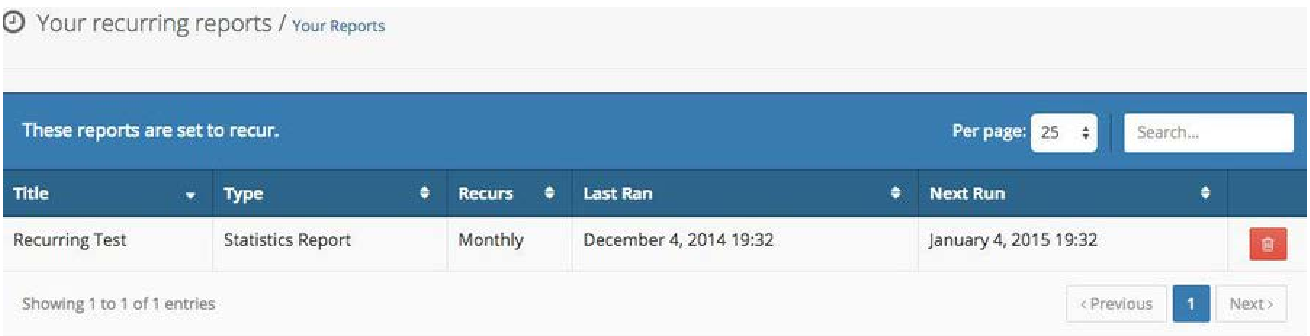

Recurring Reports: all reports set to recur will be listed in the "Recurring Reports" section . It lists the following:

- *Title:* the title of the recurring report
- *Type:* the type of report that was created
- *Recurs:* how often the report was requested to recur
- *Last Ran*: when the report was last run
- *Next Run:* when the report is next scheduled to run
- Click on the "Trash" icon to delete the report from your inbox

When your recurring report is ready, you will get an email from Link2Feed with the link to the report. Make sure to check your spam/junk folders if you are unable to see it.

Statistics Report

Provides an aggregate overview of various metrics, configurable at run-time.
Step-by-Step Guide

1. 

Click on the "Reports" heading. Click on "New Report".

2. Click on the "New Report" 

button underneath the Statistics Report description.

- Enter a title for your report
- Choose if this report is just for you or if it can be shared with other users in your network

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- Choose the date and time you want to start running the report

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- For recurring reports, you can choose when the recurrence will begin or between what dates the reports will recur

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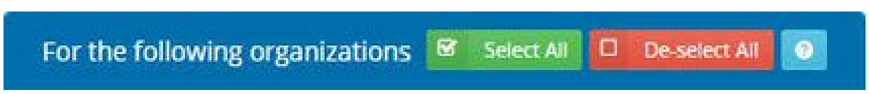
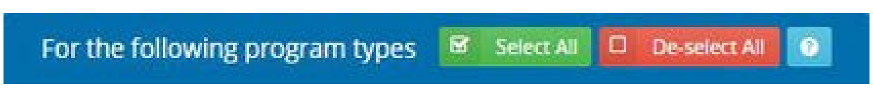


- Choose the organization(s) you want to report on

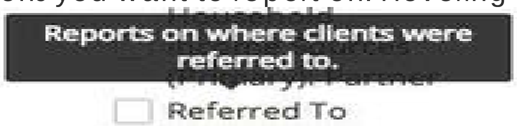


- Choose the program type(s) you want to report on

Sections

"Employment Type" for Canadian Food Banks: there is no section in client intake to record employment type. The system is saving employment type as "Full Time" or "Part Time" if the income type is selected either as Full Time or Part Time, irrespective of whether it is the primary income source or not. If the income type selected is neither of those, then it keeps the employment type as either student or none based on the option selected. It is a Student if "Yes" was selected for the "Post Secondary Student" question.

"Self-Identity" will only count "In Canada 10 Years or Less" if it was checked off. It does not verify if the year is indeed within 10 years or less of the date you're reporting on.

- Choose the sections you want to report on. Hovering over a particular section will give more information on it 

- Clicking on the "Client"  , "Household"  or "Visit"  buttons will automatically check off sections related to those categories
- Click on the "Create Report"  button
- Your report will be found in your "Report Inbox".

Tips

 You can find blue question marks at the top of certain sections. Clicking on it will provide more information on how to complete the area you are filling out.

Statistics Report

Table

Age Group: Household

Tools

Gives a break down of the all household members age in groups.

Per page: 10 Search...

	LFBA	Total
0-18 years	12	12
19-24 years	2	2
25-35 years	18	18
36-50 years	13	13
51-59 years	3	3
60+ years	2	2
Total	50	50

Showing 1 to 6 of 6 entries ‹ Previous 1 Next ›

- The light blue heading represents the title of the section that was chosen to be reported on.
- The dark blue heading describes the section.
- The list items appear on the leftmost column and the totals for each organization are listed in sequential columns.
- The rightmost column will be the total of all columns combined

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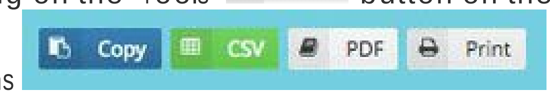
Clicking on the "Tools" 

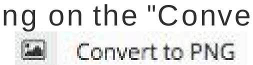
button on the right side of each section will reveal other options 

- Copy: this copies the table
- CSV: this exports the table into a CSV file, generally viewed with Microsoft Excel
- PDF: this exports the table into a PDF
- Print: this presents a printer-friendly version of the table (press "Esc" on your keyboard to return to the report)

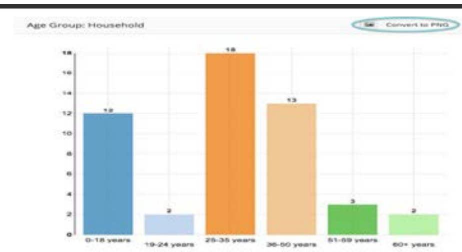
Clicking on "Enable Scrolling" 

will allow you to scroll to the right if there are more items in the table that cannot currently be seen.

Bar Graph

Clicking on the "Convert to PNG" 

button will allow you to save this graph as a PNG (image) file onto your device.



Donut Chart

Variables can be removed from the donut chart by deselecting a list item. The percentages will re-adjust automatically to still represent a total of 100%. In the second chart, 0-18 years and 60+ have been removed.

Clicking on the "Convert to PNG" 

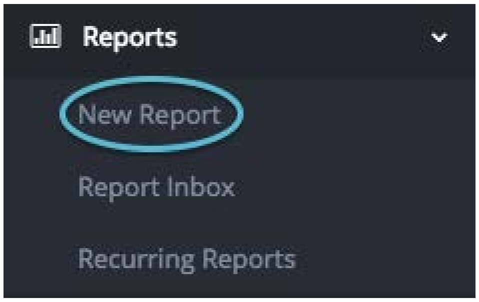
button will allow you to save this graph as a PNG (image) file onto your device.

Click on the "Print View" 

button at the top of the page to see the printer-friendly version to print the entire report.

Heat Map Report

A visual distribution of clients who have visited in the report period.

1. 

   Click on the "Reports" heading. Click on "New Report".

2. Click on the "New Report" 

button underneath the Heat Map Report description.

- Enter a title for your report
- Choose if this report is just for you or if it can be shared with other users in your network

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- Choose the date and time you want to start running the report

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- For recurring reports, you can choose when the recurrence will begin or between what dates the reports will recur

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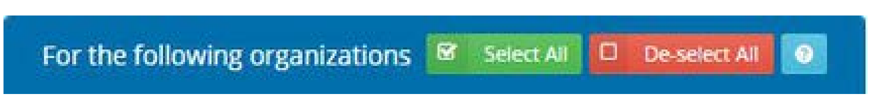


- Choose the organization(s) you want to report on

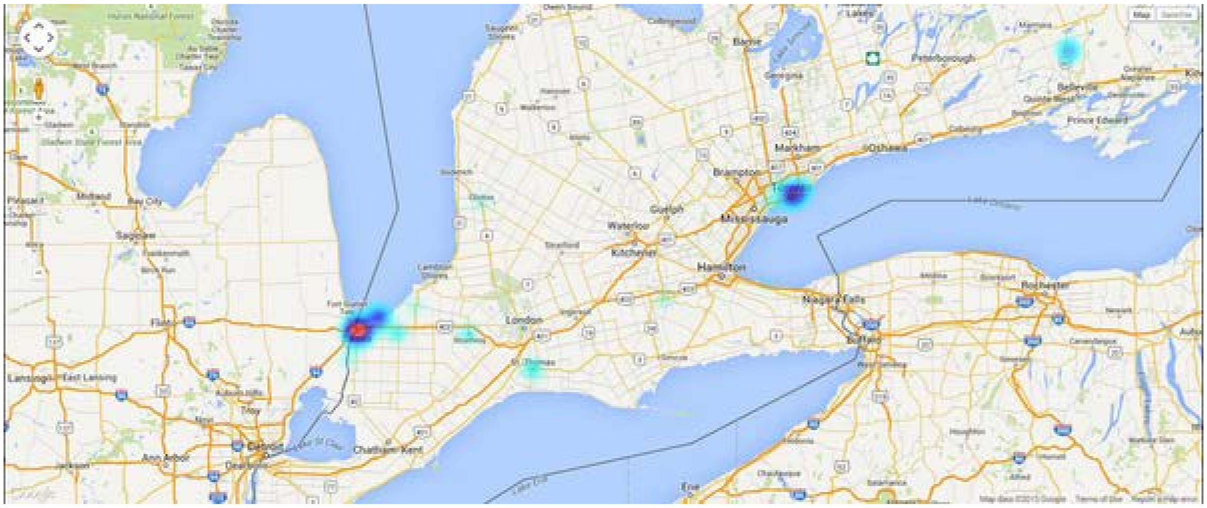
- Choose the program type(s) you want to report on

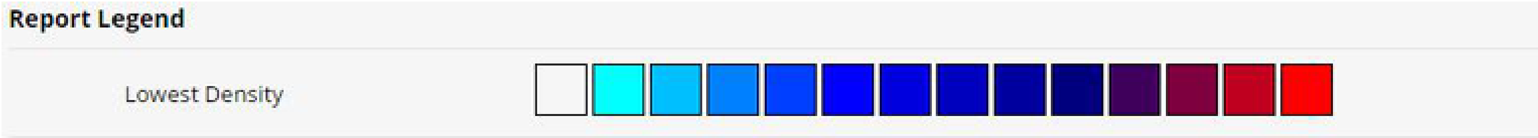
- Choose what type of data you want shown on the heat map you want to report on.
- Click on the "Create Report" 

button
- Your report will be found in your "Report Inbox".

Tips

 You can find blue question marks at the top of certain sections. Clicking on it will provide more information on how to complete the area you are filling out.





The Heat Map colors now range from white to red. It also includes a legend for the colors.

Click on the "Print View" 

button to see the printer-friendly version to print the report.

Interactive Household Report

A report allowing cross-tabulation of visit demographic data on key metrics

Step-by-Step Guide

1. 

Click on the "Reports" heading. Click on "New Report".

2. Click on the "New Report" 

button underneath the Interactive Report description.

- Enter a title for your report
- Choose if this report is just for you or if it can be shared with other users in your network

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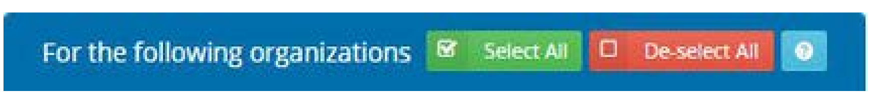
- Choose the date and time you want to start running the report

---

- For recurring reports, you can choose when the recurrence will begin or between what dates the reports will recur

---



- Choose the organization(s) you want to report on

- Choose the program type(s) you want to report on
- Click on the "Create Report" 

button
- Your report will be found in your "Report Inbox".

Tips

You can find blue question marks at the top of certain sections. Clicking on it will provide more information on how to complete the area you are filling out.

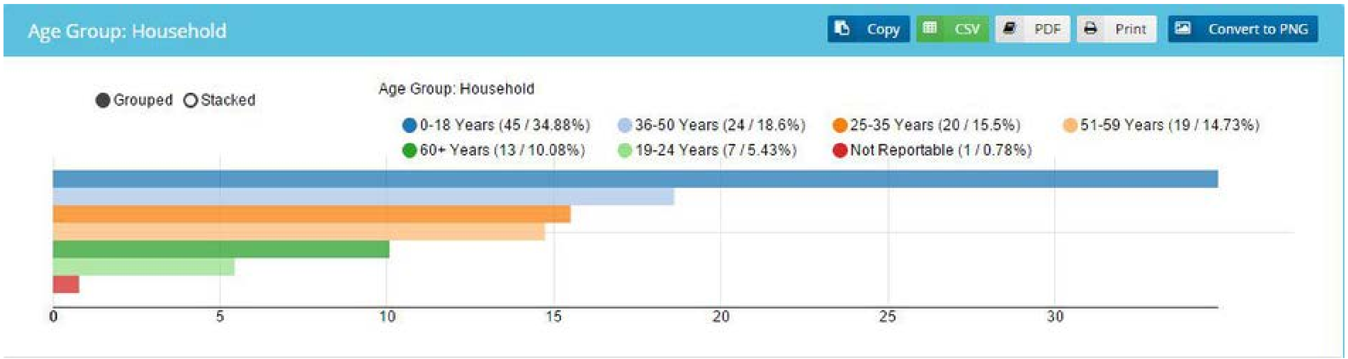
Interactive Report

The Interactive Report includes a data table with counts and percentages. The graph only includes the top 8 items, while the table includes all of the items in the field. The graph will only total up the percentages of the top 8 items; this may not equal 100%.

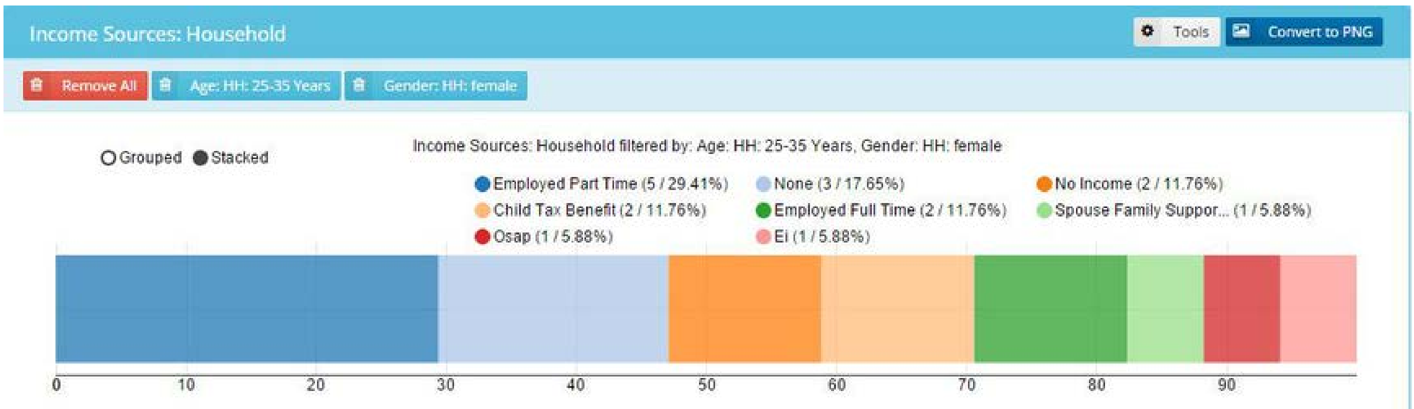
The percentage calculations are rounded to 2 decimal places which may result in a percentage total a little above or below 100%. The results for the graph and data table are ordered by count (highest to smallest), not alphabetical order. If two items have the same count, it is then listed alphabetically.

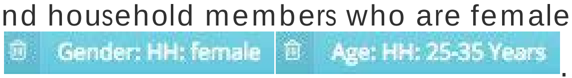
You can click on "Pivot" Pivot at the end of the row to isolate that item, in the same way as if you clicked on a section in the graph.

The report is divided by each key metric. It can be shown as grouped, as shown above, or stacked, as shown below.



When starting to cross-tabulate, each key metric's title will adjust to show what the section has been filtered by.

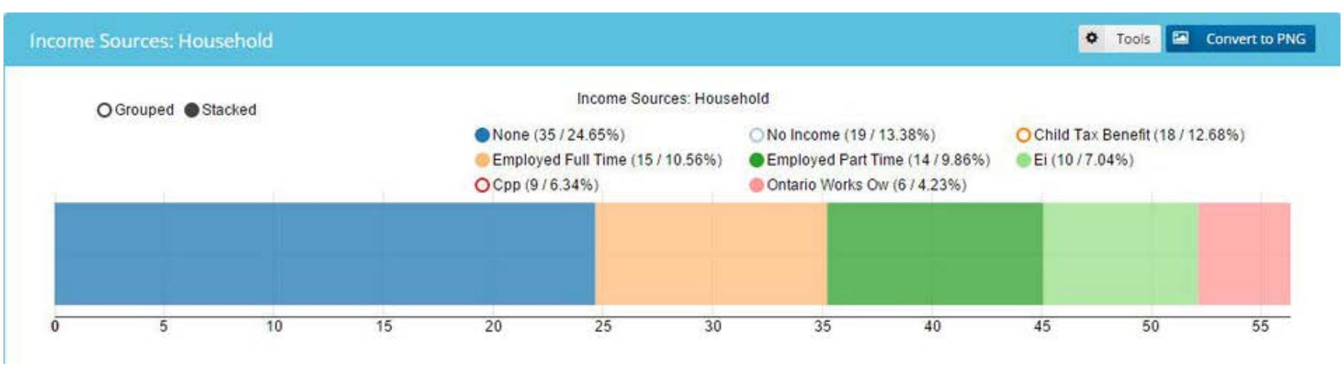


In case this, the income sources has been filtered by household members between the ages of 25-35 and household members who are female. To remove a filter, click on the blue button with its title on it 

. To remove all filters, click on the "Remove All" 

button.

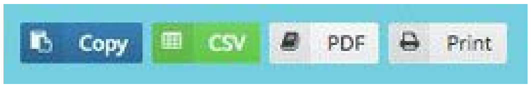
Hovering over a certain list item within the report will indicate the name of the item and how many people fit within that category. 



Certain list items can also be removed as a variable. Click on the circle beside the list item to remove it from the report In the example above, Child Tax Benefit, No Income and CPP have been removed.

Clicking on the "Tools" 

button on the right side of each section will reveal other options



- Copy: this copies the table
- CSV: this exports the table into a CSV file, generally viewed with Microsoft Excel
- PDF: this exports the table into a PDF
- Print: this presents a printer-friendly version of the table (press "Esc" on your keyboard to return to the report)

Click on the "Convert to PNG" 

button to save the particular section as a PNG (image) file on your device.